**Our Budget:**

| **Upfront/ Installation** | **Hardware (One-time)** | **Software (Monthly)** | **Payment Processing** |
| --- | --- | --- | --- |
| $ | $ | $ |  |

**POS Demo Information:**

System Name: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Demo Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Sales Representative: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ Contact Info:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Our Must-have Features:**

|  | **Included free** | **Included for a fee** | **Requires integration** | **Not available**  |
| --- | --- | --- | --- | --- |
| Feature 1:  |  |  |  |  |
| Feature 2: |  |  |  |  |
| Feature 3: |  |  |  |  |
| Feature 4 |  |  |  |  |
| Feature 5:  |  |  |  |  |

* Does the POS fit in our budget?
	+ Yes
	+ No
	+ Does it include our must have features?
	+ Yes
	+ No
		- Does the POS integrate with other software we already use?
		- Yes
		- No
	+ Does it offer additional attractive features we hadn’t thought about?
	+ Yes
	+ No
* Can it grow with our business if our needs change?
	+ Yes
	+ No
	+ Are there installation or implementation fees?
	+ Yes
	+ No
* What is the lead time for installation? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Available Features:**

* Free Trial
(length: \_\_\_\_\_\_\_\_\_\_\_\_\_ )
* Table management
* Coursing
* Seat numbers
* Pre-authorized tabs
* Check splitting
* Re-open closed checks
* Handheld order and payment devices
* Offline payments
* Speed order screens
* Forced/ unforced modifiers
* Combo building
* Online ordering
* Delivery management
* Digital receipts
* Digital signatures
* Offline functionality
* Ingredient-level inventory
* Recipe database
* Vendor management
* Purchase order management
* Physical count app
* Time clock
* Employee scheduling
* Enforced clock-ins
* PTO tracking
* Payroll integration
* Tip pool management
* Templated reports
* Customizable reports
* Reporting app
* Detailed analytics
* Forecasting tools
* Digital Manager log
* Email/ text marketing
* Loyalty
* Customer support hours: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

**Businesses that use this POS:**

| Business name: Owner/ Manager: Contact info:  | Comments:  |
| --- | --- |
| Business name: Owner/ Manager: Contact info:  | Comments:  |
| Business name: Owner/ Manager: Contact info:  | Comments:  |

**Final Decision:**

* Estimate Received (Date: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_)
* Is this system our final selection, or a pass?
	+ Final Selection
	+ Pass
* Contact Sales Representative with final decision