



THE ULTIMATE GUIDE TO Switching POS Providers



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Not all relationships are meant to last forever – and your restaurant POS might be one of them. If you've weathered connectivity issues, shelled out for expensive repairs, and spent hours on hold with customer support, it may be time to say goodbye and officially start looking at switching your POS provider.

But your POS is responsible for managing many aspects of your business. How do you start looking when your business is already set up with your current system? When is it time to start looking? Will it impact your business?

That's where this guide comes in. Whether you're switching from a legacy system or a cloud-based system, we'll walk you through the entire process of switching POS providers – from start to finish.

This guide will cover:

- [The different types of POS systems](#)
- [10 signs it's time to switch POS providers](#)
- [Questions to ask when shopping for a new provider](#)
- [How to switch from one modern POS system to another](#)
- [How to switch from a legacy system to a cloud or hybrid POS](#)
- [Tips for a smooth transition](#)

MYTH: You need to shut down your restaurant to switch POS systems.

FACT: You can make the switch without any service interruptions!

Legacy, Cloud, and Hybrid POS Systems

Before you can consider switching POS providers, it's important to distinguish between three different types of restaurant POS systems, so you understand what your options are. The three most common types of systems are: legacy, cloud, and hybrid.

Legacy POS Systems

Legacy POS systems store all your POS hardware and software on site. This means that all your sales data is stored on local servers and the system runs on a closed internal network. With this type of system, your data can only be accessed from the on-site system and a technician must be brought in each time a repair or upgrade is needed.





Modern POS Systems

Cloud POS Systems

With a cloud-based system, your data is stored on remote servers (“the cloud”), and you can access it via the Internet. This means that you can log into the system from any device as long as you have an Internet connection. Of course, the downside of a strictly cloud-based system is that if your Internet goes out, all your POS functions go out with it.

Hybrid POS Systems

A hybrid POS system is a bit like the best of both worlds. A hybrid POS is still a cloud-based platform, but it also has a hardwired, local connection in the restaurant. This setup means that you get all the convenience and flexibility of a cloud-based POS, but you also have a local connection to keep you up and running if the Internet goes down.

MYTH: Switching from a legacy system to the cloud means that you have to start from scratch.

FACT: You can migrate data from your old system and integrate existing setups with third-party vendors.

10 Signs It's Time to Switch

Whether you're currently on a legacy or a cloud-based system, there are usually a few issues that will cause you to start considering a switch. Here are 10 signs that your current POS system just isn't cutting it:

1. It's complicated to use

If your POS makes basic tasks (like placing orders and splitting checks) a major hassle, it's time to look for a more user-friendly system.

2. It slows down service

A POS that lags and slows down service can ruin a diner's experience and make life tougher for your whole team.

3. It can't be accessed remotely

If your POS data can only be accessed on site, you aren't able to make important business decisions when you're off site.

4. It requires a multi-year contract

If your provider requires you to sign a multi-year contract to continue using their system, you won't be able to change your mind if your business needs change.

5. It's too expensive

A POS that requires pricey hardware or maintenance cuts into your bottom line.

6. It has limited integrations

If your POS can't be integrated with third-party applications for functionalities like inventory tracking, employee scheduling, and online ordering aggregators, you'll have to juggle multiple tools instead of one central tool.

7. It can't scale with your business

If your current POS has limited capabilities, it will hinder your ability to expand and grow your business.

8. It's a security risk

If your POS has an outdated security system, it puts your data and your customer's data at risk.

9. It can't take payments offline

A POS system with no offline mode means that you can't complete sales if your Internet goes down – a major problem for busy restaurants.

10. Its customer support is lacking

A POS provider with limited support hours or unhelpful representatives means precious time and money is wasted when issues pop up – and you can't afford to be on hold for a long time when you're having issues at your restaurant.

MYTH: Only large venues need POS systems.

FACT: Today's POS systems come in all shapes and sizes, and are designed to scale with your business as it grows.

Shopping for a New POS Provider: What to Ask

If these warning signs feel a little too familiar, you might be ready to shop for a new POS provider. But switching systems can be a big change and you want to make sure you find the right partner before you decide to make things official.

To ensure that you're not just trading one imperfect POS system for another, here are some key questions to ask to ensure you're making an upgrade:

1. What type of hardware is required?

Find out what type of hardware you'll need and whether you can reuse your existing hardware or you need to purchase new devices.

2. What are the basic software capabilities?

Ask about the different functionalities to make sure that your new provider can support all the features you currently use (and the new ones that you need).

3. What integrations can the POS system support?

Make sure your new POS system can directly support the integrations you're currently using or if there are other integration partners you can use that offer similar functionalities.

4. What payment processors are supported?

Find out whether your current payment processor is supported by your new system. Or, if you're looking to make a switch, ask about whether your new POS provider offers integrated payment processing.

5. How much does the system cost?

Ask for the total costs of your new system, including both hardware and software to make sure the new system is more economical than your old solution.

6. How and when can you access customer service?

Find out if your new provider offers 24/7 customer service and whether there are any hidden fees for speaking to customer service reps.

7. How long does it take to go live with the new system?

Find out the full timeline for switching systems, including hardware setup, menu migration, and staff training.

8. Is there any downtime involved in switching POS systems?

Find out whether there's downtime involved in switching POS systems and if there is, ask how long that downtime will be.

MYTH: Your hardware needs to be “restaurant grade.”

FACT: “Restaurant grade” is not an official term. Both Apple and Android hardware is tough enough to withstand the spills, drops, and heat of a restaurant environment.



How to Switch POS Providers

So you've done your shopping, asked all the right questions, and think you may have found the perfect POS provider. But switching such a huge part of your business can seem daunting – how do you get through it successfully?

No matter what kind of system you're currently using, switching POS providers is actually pretty simple. Here are the steps you need to take to implement a new POS system:

Switching from a Legacy System to a Cloud or Hybrid POS

If you're switching from a legacy system – like a cash register – to a modern POS, here are the six steps you need to take.

1. Start with Menu Migration

When switching from a legacy system to a hybrid or cloud-based POS, the first step is to migrate your menu. In most cases, restaurateurs have programmed their entire menu into their POS, including modifiers.

In order to transfer all of this data to your new POS system, you'll need to export your old menu from your legacy system. Quite often, this is as simple as exporting a PDF or spreadsheet from the legacy system.

However, if your menu could use an update anyway, you might skip this step entirely and build your menu from scratch in your new POS system. For instance, TouchBistro offers a menu inputting service to help restaurateurs clean up and simplify their menu when switching over to a new POS system.

2. Loyalty Data Migration

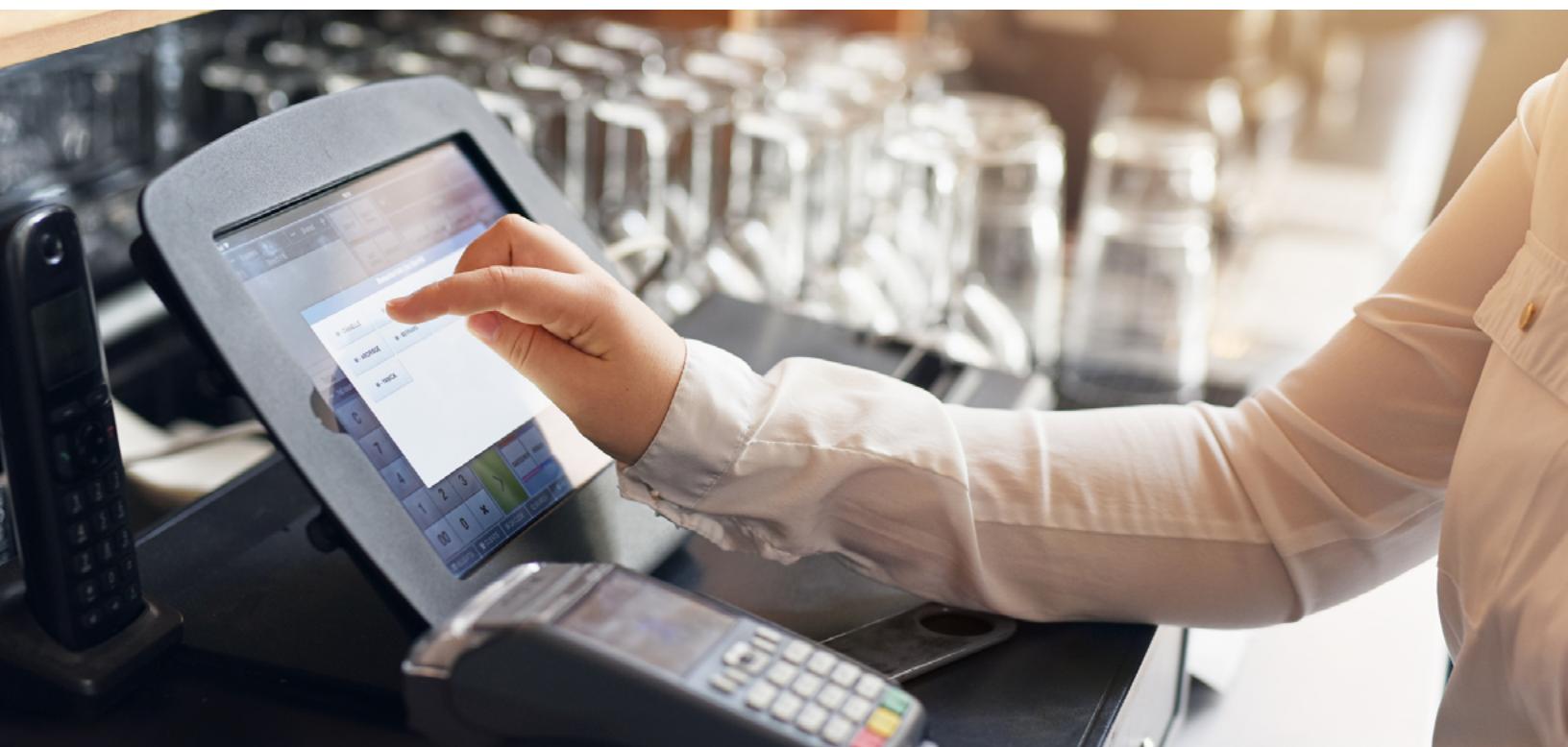
If your restaurant has a loyalty program or gift cards, this is an important step. To ensure that you don't lose any important loyalty data, you'll need to contact your current gift card provider to download your records. Your new provider will need these records in order to create new gift cards for your restaurant.

Of course, if your restaurant doesn't use an integrated loyalty program or gift cards, you can skip this step entirely.

3. Review Your Payment Processor

With data migration out of the way, the next step is to address the issue of your payment processor. Some POS systems are compatible with nearly all major processors, while others have a more limited list of compatible processors. In some cases, the POS provider may even require you to use its integrated payment processing services.

Let your new POS provider know which payment processor and payment devices you currently use – especially if you are already under contract with a specific payment processor. This is also a great opportunity to look at new payment processing partners, as integrated payments can be a huge time-saver when running your restaurant.



4. Order and Set Up New Hardware

If you're currently using a legacy system, hardware will be one of the biggest changes for you and your staff.

Instead of the clunky, oversized monitors that you're used to, hybrid and cloud-based systems are largely run off of iPads or other tablets. These tablets and other hardware – such as printers and Internet routers – can be ordered directly through your new POS provider. Though you may be able to use some of your existing hardware, it's generally recommended to purchase new hardware through your provider to ensure compatibility and make the onboarding process even easier – think of it as a one-stop shop!

Once your hardware arrives, your new POS provider should provide you with a startup guide and best practices to help get you started. However, many cloud-based POS systems are so intuitive that the hardware setup can be completed on your own or with remote training from your POS provider.

5. Organize Team Training

After your hardware has been set up, it's time to learn how to use it. It may seem intimidating to learn a whole new system, but most modern POS systems are fairly straightforward to learn and understand. In most cases, you can set up remote training sessions with specialists who will walk you through all the major functions.

Of course, you probably have quite a few staff members who need to get up to speed on the new system. In this case, most providers will offer flexible training options, such as webinars, videos, or even remote training sessions, so staff can train at their preferred speed.



6. Install the New System

You've migrated your menu, you've swapped your clunky monitors for tablets, and you've learned how to use your new system – the only thing left to do is have the full setup installed! And contrary to what you might have heard, the installation process can take place without ever interrupting service, so there's no need to shut down your restaurant for even an hour.

Once the installation is fully complete and you're ready to flip the switch, your new POS system can go live.

MYTH: There's a steep learning curve switching from legacy to the cloud.

FACT: Modern POS systems are designed to be intuitive and user-friendly enough for virtually anyone to use.

Switching from a Legacy System to a Cloud or Hybrid POS

If you're switching from a legacy system – like a cash register – to a modern POS, here are the six steps you need to take.

1. Start with Menu Migration

If you're already using a cloud-based POS, migrating your menu couldn't be easier. Depending on the type of system you're currently using, your new provider may be able to go in and extract all your menu information – you won't have to lift a finger.

Even if your new provider is unable to go in and retrieve your information for you, your current provider should be able to export your data. This data can then be migrated to your new platform, and your menu can be set up with little hassle.

2. Review Your Payment Processor

Following your menu migration, the next step is finding out whether your current payment provider integrates with your new POS system. In some cases, your new POS provider may offer a direct integration with your payment provider. In other cases, an indirect integration may be possible through a gateway, but this comes with additional fees. This is also a great time to investigate your payment processor options and ensure that you're getting the best deal instead of bringing over what you've been using up until this point.

3. Connect Integrations

If you currently use a cloud POS system, you may already have third-party app integrations set up to do inventory tracking, scheduling, accounting, and more. You'll need to check with your new provider to see if these integrations are supported directly or look at new integrations partners with the same or similar functionalities.

In some cases, you may be able to use programs that facilitate an indirect connection. For instance, Shogo can be used to seamlessly connect your POS system to accounting software such as Xero, QuickBooks, and Sage.

4. Changing or Adjusting Hardware

If you're already using iPads or other tablets in your restaurant, hardware will be the least of your worries. In some cases, you can use the same tablets you're already using and simply load a new provider's app onto your devices. Just make sure that the devices you have are new enough to support your POS software.

However, if you're switching from an Android operating system to iOS (or vice versa), you'll need to order new tablets. If this is the case, you can order the necessary hardware right through your new provider to make things easy.

5. Organize Staff Training

If you already have iPads or other tablets in your restaurant, training can start right away. Simply upload your new software and set aside time at your restaurant to let staff get familiar with it. Provide them with resources – like webinars or training videos – or talk to your new POS provider about remote training options.

If you already have a cloud-based POS, training should be fairly straightforward and familiar for most staff.

6. Install the New System

With training complete, installation is the final step. In addition to your POS hardware, you'll want to set up a kitchen display system or self-ordering kiosks if those systems are part of your setup.

Once everything is in place, you can go live with your new system without ever interrupting service.

Tips for a Smooth Transition

Here are the top tips for making sure it's a seamless transition – for you and your team.

- Give yourself a reasonable timeline for switching POS systems so you don't need to rush the training and installation process.
- Take time to play with your new POS system prior to training so that you can ask pointed questions during implementation.
- Carry out training sessions in offline mode so that staff know how to use the system if the Internet goes down.
- If you have multiple locations, carry out a pilot test at one restaurant so that you can iron out any issues before rolling out the POS across all your restaurants.

Make the Switch Now

Switching your POS doesn't have to be scary – with the right research and new partner, it can actually be a pretty painless transition. From menu migration to training your team, your new POS provider should work with you every step of the way to make sure that your new POS system makes running your restaurant easier and more successful.



Why Switch to TouchBistro?

TouchBistro is an iPad POS and integrated payments solution **built for restaurant people, by restaurant people** – with every feature designed to meet the unique needs and fast pace of the foodservice industry. Used in more than 100 countries, TouchBistro has powered over 25,000 restaurants worldwide.

TouchBistro **makes running a restaurant easier** by streamlining and simplifying all aspects of restaurant management – so restaurateurs have **more time to focus on their passion** and the reason they opened their business in the first place.

Designed to help restaurateurs **run a better and more successful business**, TouchBistro's hybrid system enables restaurants to make more money, deliver a great guest experience, and take the guesswork out of making business decisions.

TouchBistro also offers **in-depth training** and **free 24/7 technical support** provided by POS specialists who have worked in the restaurant industry as former managers, servers, and chefs.

“We used a different system before, but switching over to TouchBistro really helped speed up our service. We can serve more customers and more importantly, keep them happy!”

David Atkinson, The Drake Pub, Canmore, AB

Interested in switching to TouchBistro?

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