Retail POS switching checklist

Compare the full cost, protect your data, and plan a controlled move from Square to another POS.

Business: _____ New POS: _____

Owner: _____ Target launch: _____

1. Confirm what the new plan includes

- [ ] List your SKU count, locations, registers, employees, monthly card volume, transaction count, and online sales share.
- [ ] Confirm plan access for stock by location, purchase orders, transfers, barcode labels, returns, and staff permissions.
- [ ] Get a written quote covering every location and register, processing rates, billing term, renewal terms, and cancellation fees.
- [ ] List paid apps, integrations, support packages, and any features that require a higher plan.

2. Calculate recurring and switching costs

- [ ] Calculate processing as card volume x percentage rate + transaction count x fixed fee. Model online and keyed payments separately.
- [ ] Add software, paid apps, equipment leases, and any payout fees you plan to use.
- [ ] Inventory each device by model. Confirm which tablets, printers, scanners, and drawers can be reused. Budget for replacement payment readers.
- [ ] Budget for data cleanup, import assistance, staff training, overlapping subscriptions, and contract exit costs. Separate estimates from vendor fees.

Monthly operating cost: $_____ One-time switching cost: $_____

First-year cost = 12 x monthly operating cost + one-time switching cost.

Prepare, verify, then switch

3. Back up and map your data

- [ ] Export Square items, customers, inventory by location, transaction reports, and tax reports. Store secure backup copies.
- [ ] Map SKUs, barcodes, variants, prices, tax settings, costs, suppliers, and location names to the new import format.
- [ ] Confirm separately how historical orders, gift cards, store credit, loyalty balances, saved payment cards, and open orders will be handled.
- [ ] Import a small sample first. Review errors, duplicate records, product status, and quantities before importing the full catalog.

4. Prepare each store

- [ ] Complete payment approval, bank account verification, tax setup, and hardware setup for both locations.
- [ ] Create five individual employee logins and check permissions for refunds, discounts, cash drawers, and reports.
- [ ] Train staff on checkout, receiving inventory, transfers, returns, and the outage procedure supported by the selected equipment.
- [ ] Verify a sale, refund, receipt, barcode scan, inventory adjustment, location transfer, and payout reconciliation before launch.

5. Control the launch and retain records

- [ ] Choose a quiet launch window. Freeze catalog changes, count stock at each location, and load final opening quantities.
- [ ] Assign one system to record live sales during the transition. Reconcile any transactions recorded after the final export.
- [ ] Confirm how to handle old Square refunds, disputes, gift cards, and outstanding balances before canceling services or deactivating the account.
- [ ] Reconcile sales, fees, payouts, and stock after launch. Keep historical exports and the records needed for taxes and disputes.

Launch approved by: _____ Date: _____

Reference guides

Shopify: migrate from Square

Lightspeed X-Series: import request guide