Installation Questionnaire

Please complete this questionnaire before your installation discovery call. Select all applicable options and enter short responses where requested. Attach photos or supporting files when noted.

1. Store & Installation Contacts

Store Information: Enter Store Name, Store Address, and Store Number

Property Expert Information: Enter Name, Role / Title, Phone Number, and Email

Property Expert: the point of contact who provides or verifies store information, pay rates, and other setup details.

Target Installation Date MM/DD/YYYY

Target Go-Live Date MM/DD/YYYY

2. Hours & Order Types

Hours of operation

Day	Open	Lunch	Close
Monday	Time / Open	Lunch Time	Time / Close
Tuesday	Time / Open	Lunch Time	Time / Close
Wednesday	Time / Open	Lunch Time	Time / Close
Thursday	Time / Open	Lunch Time	Time / Close
Friday	Time / Open	Lunch Time	Time / Close
Saturday	Time / Open	Lunch Time	Time / Close
Sunday	Time / Open	Lunch Time	Time / Close

Order Types - select all that apply.

☐ Quick Sale ☐ Dine In ☐ Takeout ☐ Delivery

☐ Drive Thru ☐ Catering ☐ Refund

(If Applicable) Delivery Charge/Minimum Order: Charge $___ | Minimum $___

3. Menu & Reporting Setup

Report Groups (Reporting/QuickBooks Alignment) - select all that apply.

☐ Food ☐ Beer ☐ Wine ☐ Liquor ☐ Retail ☐ Other

Other Group Specification: Enter other report group

I confirm that the actual menu/menu copy has been provided so the team can create menu categories and sales groups.

☐ Confirmed ☐ I have not sent over a copy of the menu

Are menus limited by specific days/times?

☐ Yes ☐ No

(If Applicable) Menu Schedule Details (Example: Lunch Menu / Happy Hour): Enter response:

_____

Do prices change by day/time?

☐ Yes ☐ No

Pricing Schedule Details: Enter applicable days, times, items, and prices

4. Taxes, Payments & Pricing Programs

Sales Tax Rate (%) Enter %

Liquor Tax Rate (%) If applicable, enter %

Other Tax Rate (%) If applicable, enter %

Other Tax Description Enter tax name/type

Are Menu Items Tax Inclusive?

☐ Yes ☐ No

Payment Methods - select all that apply.

☐ Cash ☐ Credit/Debit ☐ Check ☐ Coupon

☐ Tonic Gift Card ☐ External Gift Card ☐ House Account/Tab ☐ Other

(If Applicable) Provider/Method for Other Payment: Enter details

Is dual pricing used?

☐ Yes ☐ No

(If Applicable) Dual-pricing percentage (Example: 4%): Enter response: _____

5. Discounts, Comps, Gratuity & Tips

Apply Discounts

☐ Yes ☐ No

Discount Details (Example: Employee Discount - 20%): Enter response: _____

Apply Comps

☐ Yes ☐ No

Comp Details (Example: Manager Comp - 100%): Enter response: _____

Automatic Gratuity

☐ Yes ☐ No

Automatic Gratuity Details: Party size and %

Tip Pooling

☐ Yes ☐ No

Tip Pooling Details: Rules / Participants / Division

Credit-card tip payment method

☐ Cashout ☐ Payroll ☐ Other

6. Cash Handling

Cash drawers used?

☐ Yes ☐ No

Will employees/servers use personal cash banks?

☐ Yes ☐ No

Do servers cash themselves out?

☐ Yes ☐ No

Do bartenders cash themselves out?

☐ Yes ☐ No

Will employees optionally declare cash tips?

☐ Yes ☐ No

Is petty cash used?

☐ Yes ☐ No

Petty cash reasons/categories (Example: Supplies, produce, change fund): Enter response:

_____

7. Integrations

Tonic Integrations - select all that apply.

☐ House Accounts ☐ Tonic Gift Cards ☐ Customer Loyalty ☐ Time & Attendance

☐ Inventory ☐ None

(If Applicable) Tonic Native OLO Schedule

☐ Yes ☐ OLO Schedule is the same as store hours

Operating hours for OLO (Monday to Sunday): Enter operating hours by day

Third-party Integrations - select all that apply.

☐ Payroll (ADP) ☐ Inventory ☐ Delivery (Orderhub/Chowly)

☐ Accounting/Billing (QuickBooks) ☐ Gift Cards ☐ Other ☐ None

Provider Notes (Example: DoorDash, QuickBooks, ADP): Enter response: _____

8. Floor Charts & Service Areas

Will the store use a full-service table/floor chart?

☐ Yes ☐ No

Service Areas Description (Example: Main Dining, Patio, Bar): Enter response: _____

9. Printer & KDS Areas

Examples: Bar - beer, wine, liquor, no non-alcoholic beverages; Fry - french fries, nuggets

Printer/KDS Areas: Enter response: _____

_____

_____

_____

10. Customer Receipt

Enter two footer lines (maximum 42 characters per line).

Footer line 1: Enter first receipt footer line

Footer line 2: Enter second receipt footer line

11. Attachments & Final Confirmation

Email Attachments Checklist - select all that apply.

☐ Current menu/menu copy with prices ☐ Modifier/preparation details

☐ Floor-chart photos/diagrams ☐ Printer Station/KDS routing notes

☐ Other supporting files ☐ No attachments required

Final Confirmation

☐ I confirm that all information provided is accurate.