




INDITION COMMERCE

Point of Sale

Go-Live Checklist — confirm every part is configured and tested before you take real money. Work top to bottom, tick each box, and sign off at the end.

Point of Sale Module · Version 1.2 · June 2026

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How to use this checklist

Go through the phases in order. Do **everything in Stripe test mode first** (Phases A–H), then switch to live keys and re-test (Phase I). Don't go live until every **launch-blocker** below passes and the sign-off is complete.

Each row tells you *what to do* and *how to confirm it worked*. Use the right-hand column to record Pass / Fail / N/A. Items marked **(M)** need a Manager or Admin login.

🚫 Launch-blockers — these must pass before live money flows

1. StripeTerminal installed and its webhook endpoint live, reachable, delivering **200 OK**.
2. A **real card reader paired against test mode** and a full test sale completed end-to-end.
3. **One live \$1 sale and immediate refund** on a production-paired reader.
4. Webhook **signing-secret rotation** procedure known and recorded (so a leaked secret can be replaced without downtime).
5. Store flagged *Is POS Location* with its correct (live) Stripe Terminal Location ID.

Phases

- | | |
|--------------------------------------|-------------------------------------|
| 1. A — Software install & enable | 6. F — Register computer |
| 2. B — Store & staff | 7. G — Functional test sales |
| 3. C — Stripe account & keys | 8. H — Reports & data checks |
| 4. D — Card reader hardware | 9. I — Switch to live & final test |
| 5. E — Cash drawer & receipt printer | 10. J — First 30 days (post-launch) |

A Software install & enable

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	POS module installed	The POS menu appears in the back office (Indition installs this during provisioning).	
<input type="checkbox"/>	StripeTerminal module installed	StripeTerminal shows in the module manager (Indition installs this during provisioning).	
<input type="checkbox"/>	Webhook endpoint live	The webhook URL (your-site/StripeTerminal/Webhook/receive) is registered with Stripe; proven by the Stripe test event in Phase C.	
<input type="checkbox"/>	InStorePickup current (POS-location fields)	Store record shows <i>Is POS Location</i> and <i>Stripe Terminal Location ID</i> fields.	
<input type="checkbox"/>	(M) Turn on POS Module Enabled	Master switch on in POS → Settings; <code>/pos/</code> loads a sign-in page (not a "not enabled" page).	
<input type="checkbox"/>	(M) Select at least one Store	Store appears selected in Settings; save succeeds.	
<input type="checkbox"/>	(M) Set tax mode	Live quoting left on, OR override on with a correct flat <i>Default Tax Rate</i> .	
<input type="checkbox"/>	(M) Confirm payment methods	Only the methods you intend (Cash/Card ± Check/Split) are on.	
<input type="checkbox"/>	(M) Decide the card processing fee	Off, OR on with the right percent/fixed (default 2.9% + \$0.30). Cash/check never charged.	
<input type="checkbox"/>	(M) Set receipt header/footer	Text saved; will show on printed receipts.	

B Store & staff

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	(M) Flag store Is POS Location = ON	Saved on the store record (InStorePickup → Stores).	
<input type="checkbox"/>	(M) Assign each employee a POS role	Staff & Store Access shows Cashier / Manager / Admin as intended.	
<input type="checkbox"/>	(M) Multi-store: set stores + home store per user	Each user has the right stores ticked and one home store.	
<input type="checkbox"/>	Cashier can sign in to <code>/pos/</code>	A real cashier account signs in and reaches the Open Shift / register screen.	
<input type="checkbox"/>	A no-role user is blocked	An account with no POS role cannot reach the register.	

c Stripe account & keys (test mode first)

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Create a Terminal Location	Stripe → Terminal → Locations shows it; <code>tml_...</code> copied.	
<input type="checkbox"/>	(M) Paste <code>tml_...</code> into the store record	Store's Stripe Terminal Location ID saved.	
<input type="checkbox"/>	(M) Save Secret key (<code>sk_test_...</code>)	Saved in POS Settings; field masks on reload.	
<input type="checkbox"/>	(M) Save Publishable key (<code>pk_test_...</code>)	Saved in POS Settings.	
<input type="checkbox"/>	Create the webhook endpoint	URL <code>https://YOUR-DOMAIN/StripeTerminal/Webhook/receive</code> added with the six required events (reader action succeeded/failed/updated; payment_intent succeeded/failed/canceled).	
<input type="checkbox"/>	(M) Save Webhook signing secret (<code>whsec_...</code>)	Saved in POS Settings.	
<input type="checkbox"/>	Confirm the webhook is reachable	Stripe → Webhooks → "Send test event" returns 200; no proxy strips <code>Stripe-Signature</code> .	
<input type="checkbox"/>	Connect stores only: account approved	Each store's connected account is approved to accept card payments; "Events on connected accounts" enabled.	

D Card reader hardware (Stripe S700)

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Power on the reader	Screen lights; reaches the status bar after ~30 s.	
<input type="checkbox"/>	Join store Wi-Fi (passcode <code>07139</code>)	Status bar shows Wi-Fi icon + Online . Not a captive-portal/guest network.	
<input type="checkbox"/>	(M) Pair the reader in POS → Card Readers	Generate the 3-word code on-device, add it within ~30 s; reader shows green Active and a <code>tmr_...</code> ID, serial, and device type <code>stripe_s700</code> .	
<input type="checkbox"/>	(M) Set the reader as default for the store	★ Default badge on the reader.	
<input type="checkbox"/>	Register connects to the reader	Reload <code>/pos/</code> ; on the payment screen the reader shows as connected/ready and a test charge reaches it.	

No physical test card? Ask Indition support to enable Stripe's simulated reader for your account, then pair it as a non-default reader to run the full flow without tapping.

E Cash drawer & receipt printer (if used)

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Drawer agent running on the register PC	Agent responds to the configured URL (e.g. <code>http://127.0.0.1:9100</code>) with permissive CORS.	
<input type="checkbox"/>	(M) Enable Drawer Kick + set Agent URL	Saved in POS Settings → Cash Drawer.	
<input type="checkbox"/>	Test Open Drawer (no sale)	Cash panel → Open Drawer pops the physical drawer.	
<input type="checkbox"/>	Receipt printer set as default with paper	A test print produces a clean receipt; store name/logo/address and your header/footer appear.	

F Register computer

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Up-to-date browser, full-screen/kiosk	<code>/pos/</code> loads clean and full-screen.	
<input type="checkbox"/>	Barcode scanner connected	A scan on the Products tab adds the item automatically.	
<input type="checkbox"/>	Internet reliable for register + reader	Both reach their services; a mid-charge drop recovers automatically.	
<input type="checkbox"/>	Bookmark <code>/pos/</code> ; "keep me signed in"	Cashiers can return quickly.	

G Functional test sales (test mode)

Run each transaction end-to-end on the real register. These prove the whole pipeline — pricing, tax, payment, inventory, and receipts — not just the configuration.

	Test	Confirm / expected result	Result
<input type="checkbox"/>	Open a shift with a drawer count	Opening float recorded; "Shift opened" toast.	
<input type="checkbox"/>	Cash sale + change due	Tender > total shows correct change; sale completes; drawer kicks (if enabled).	
<input type="checkbox"/>	Card sale on the reader	"Approved"; receipt screen appears; sale recorded.	
<input type="checkbox"/>	Card fee shows (if enabled)	Card screen shows "Subtotal ... + card processing fee ..."; cash sale shows no fee.	
<input type="checkbox"/>	Tax is correct	Tax line matches the expected rate; tax-exempt customer zeroes it (green badge).	
<input type="checkbox"/>	Discount (order + line)	Discount shows in red; tax recalculates on the discounted amount.	
<input type="checkbox"/>	Tip prompt (if enabled)	Preset/custom/no-tip all work; tip adds to the card charge.	
<input type="checkbox"/>	Split payment (if enabled)	Cash + card combine; Remaining reaches \$0; sale completes.	
<input type="checkbox"/>	Save card on file (if enabled)	Saved card appears as a one-tap button on the customer's next sale.	
<input type="checkbox"/>	Serialized item sale	Serial validated (✓ Available); flips to sold after the sale.	
<input type="checkbox"/>	Fractional / by-the-unit item	Quantity box accepts fraction/decimal; line total correct.	
<input type="checkbox"/>	Oversell block (if on)	Cashier is stopped at payment; Manager sees "Authorize & Continue".	
<input type="checkbox"/>	Hold & recall	F7 holds; F8 brings it back into an empty cart.	
<input type="checkbox"/>	Refund (cash & card)	Items return to stock; card refund settles to the original card.	
<input type="checkbox"/>	Exchange (even / owed / due)	Even completes with no money; owed refunds the difference; due takes	

		payment.	
<input type="checkbox"/>	Void permissions	Cashier blocked (unless self-void on, own open shift); Manager can void.	
<input type="checkbox"/>	Receipt delivery	Print, Email, and Text each work (Email/Text need a customer on file).	
<input type="checkbox"/>	Cash movements	Pay-in/out, drop, pickup each record and (if enabled) kick the drawer.	
<input type="checkbox"/>	Close shift (Z report)	Count entered; expected vs counted variance shown; Z report prints; session closes.	

H Reports & data checks

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Sale recorded correctly	The test sale appears under POS → Recent Sales and in POS → Reports (Daily Summary & Sessions) with the card payment and correct total.	
<input type="checkbox"/>	Webhook delivery healthy	Stripe → Webhooks → recent deliveries all 200 OK.	
<input type="checkbox"/>	(M) Sessions report	Your test shift appears with correct float, sales count, total, and reconciliation.	
<input type="checkbox"/>	(M) Cash Movements report	Your test movements appear, colour-coded, with reasons.	
<input type="checkbox"/>	(M) Daily Summary + Excel export	Today shows sales/refunds/net; Export Excel downloads.	
<input type="checkbox"/>	(M) Sales Analytics	Cards, daily-gross trend, and top SKUs populate.	
<input type="checkbox"/>	Connect routing (if used)	Stripe → Developers → Logs show the right <code>Stripe-Account</code> on payment-intent creation, not just reader processing.	
<input type="checkbox"/>	Clean up test data	Refund/void test transactions; agree whether test orders are purged before launch.	

I Switch to live & final test

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Create live Terminal Location	New <code>tml_...</code> from Stripe live mode.	
<input type="checkbox"/>	Create live webhook (same six events)	Live endpoint added; new <code>whsec_...</code> copied.	
<input type="checkbox"/>	(M) Replace all keys with live values	<code>sk_live_...</code> , <code>pk_live_...</code> , live <code>whsec_...</code> , and live <code>tml_...</code> saved.	
<input type="checkbox"/>	(M) Re-pair the reader against live keys	Reader shows Active with a live <code>tmr_...</code> (test-mode pairing won't carry over; no simulated reader in live).	
<input type="checkbox"/>	Live \$1 sale + immediate refund	Real card approved; refund settles. (Launch-blocker.)	
<input type="checkbox"/>	Record the webhook-secret rotation steps	A written one-paragraph procedure exists so the <code>whsec_...</code> can be rotated without downtime. (Launch-blocker.)	

J First 30 days (post-launch)

	Do this	Confirm / expected result	Result
<input type="checkbox"/>	Monitor webhook delivery	Alert if the failure rate exceeds ~1%.	
<input type="checkbox"/>	Reconcile Z reports vs deposits daily	Variances are small and explained.	
<input type="checkbox"/>	Spot-check refunds & voids	They match Stripe and inventory.	
<input type="checkbox"/>	Confirm tax on real receipts	Rates correct for the store's jurisdiction.	
<input type="checkbox"/>	Keep the reader on Wi-Fi for firmware updates	Reader stays current.	
<input type="checkbox"/>	Train staff on refunds, exchanges, end-of-day	Each cashier has run them once supervised.	

Production sign-off

By signing, the people below confirm all launch-blockers and the phases above have passed for this store, and the register is approved to take live payments.

Store / location: _____ **Date:** _____

Installer / technician

Store manager

Owner / approver

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