

Beyond the Register

Choosing a Point-Of-Sale System



About Lisa Burnett



- Business Development Manager & Consultant at Ability Business
- 14+ years helping retailers streamline operations with POS and QuickBooks
- QuickBooks Solution Provider, Lightspeed Partner, Shopify Partner
- Recipient of the 2026 Top Niche Practice Advisor by Insightful Accountant

Today's Agenda



By the end of this webinar you'll be able to:

- A better set of questions to ask yourself — and any vendor — before you buy
- A clear picture of the major POS platforms on the market today and who each one tends to fit best
- An understanding of how POS data should (and shouldn't) flow into QuickBooks

Don't start with the software. Start with your business.



1. Ask yourself & your team questions



2. Understand how your business uses software today



3. Jot down your goals for the next year, 5 years, etc



Why Retail Businesses Still Need a POS

Ability
BUSINESS

A POS doesn't just process sales, it helps you run your business.



Your Reality



The story....Monday Morning

You arrive.

Inventory needs ordered.

Weekend sales reviewed.

Employee hours checked.

Returns processed.

Customers call asking if items are in stock.

An online order comes in.

Accounting needs accurate sales.

Every one of those tasks depends on the POS.



Why Invest in a POS

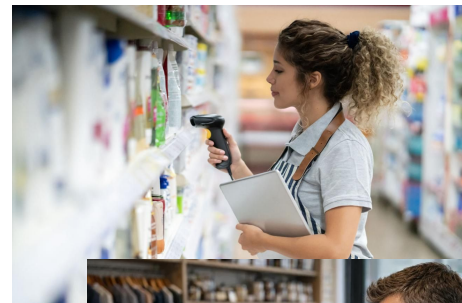


I Want To...

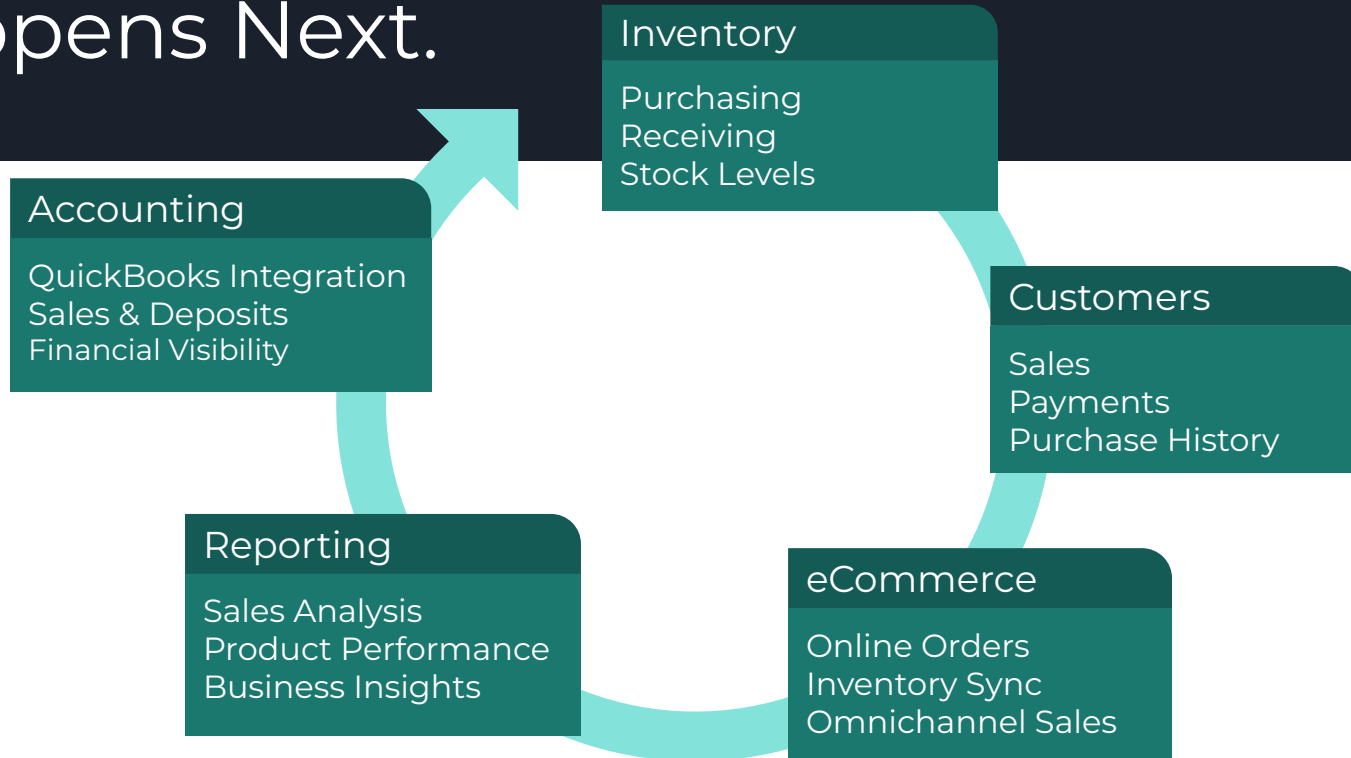
- Save time
- Reduce mistakes
- Know inventory
- Serve customers faster
- Grow
- Make better decisions

A POS Helps By...

- Automating sales and inventory
- Barcode scanning & pricing
- Real-time stock visibility
- Faster checkout & multiple payment options
- Multi-location and online selling
- Reporting & analytics



A POS Doesn't Just Record What Happened...It Helps Determine What Happens Next.



Every Business Isn't the Same



Business	Needs
Clothing Boutique	Matrix Inventory (Variants: style/color/size)
Grocery & Produce	Sell by Weight, Units of Measure, EBT (SNAP), Age Verification
Specialty & Gift Shop	Curated Inventory
Consignment & Resale	Tracking Consigned Inventory & Payouts
Service + Retail	Scheduling, Tipping, Inventory
Garden & Nurseries	Seasonal Inventory, Tree Tags, Bulk - Random Weight
Coffee Shops	Quick modifiers, Station ticket routing, Inventory
Restaurants	Kitchen workflow, Table Seating, Multiple Menus, Tipping, Split Bill

Popular POS Platforms at a Glance



Platform	Best for	QuickBooks Online Integration	eCommerce
Shopify	Omnichannel Retail	Connector App	Native
Square	Small retailers & service	Connector App	Square Online
Lightspeed (X-Series)	Inventory-Heavy Retail	Native, Post register close	Built-in Lightspeed eCommerce
Clover	Payment-First Retail	Connector App	Clover Online Store
Toast	Restaurants & Hybrid	Connector App	Toast Sites & Ordering, Retail: Shopify or other Apps
Revel (Shift4 Dine)	Enterprise Retail & Restaurant	Native, Daily Sync, Sent at a specific time - set in the settings.	Restaurant: Native Online Ordering Retail: Third Party
register by ability business	QuickBooks Online Small Retailers	Native, Automatically, Real-Time	Third-Party, QuickBooks Online Side

Shopify POS

Good Fit If: Great for businesses where online sales are a priority. Be sure to discuss how inventory and accounting data will flow into QuickBooks before implementation.

Best for Omnichannel Retail

Ideal For

- Retailers selling both in-store and online
- Businesses with a strong eCommerce presence
- Multi-location retailers
- Brands with online fulfillment

Standout Features

- Native Shopify eCommerce
- Inventory across online and retail
- Product variants (size, color, style)
- Gift cards
- Customer profiles
- Shipping & fulfillment
- Mobile POS

QuickBooks Online Connection

- Typically requires a third-party connector or middleware
- Can sync: Sales, Payments, Products, Inventory (connector dependent), Customers
- Most integrations post summarized daily sales, though some offer more detailed options.

Considerations

- ✓ Excellent omnichannel experience
- ✓ Strong online tools
- ⚠ Accounting workflow depends heavily on the integration selected.

Square POS

Good Fit If: A great entry point for smaller businesses, but ask about future growth. Switching POS systems later can be much more disruptive than choosing the right one from the start.

Best for Small Retailers & Service Businesses

Ideal For

- Small retail
- Pop-up shops
- Mobile businesses
- Service providers
- New businesses

Standout Features

- Easy setup
- Built-in payment processing
- Inventory tracking
- Customer directory
- Employee management
- Gift cards
- Online store

QuickBooks Online Connection

- Connects through Square's integration ecosystem
- Typically syncs: Daily sales summaries, Deposits, Fees, Taxes
- Inventory synchronization capabilities vary by integration.

Considerations

- ✓ Simple to implement
- ✓ Affordable
- ⚠ Growing retailers may eventually require more advanced inventory functionality.

Clover

Good Fit If: Ask who is providing the Clover solution. Features and available integrations can vary depending on the reseller and app ecosystem.

Best for Payment-Centric Retailers

Ideal For

- Retail stores
- Convenience stores
- Specialty shops
- Businesses purchasing POS through a payment providers

Standout Features

- Touchscreen terminals
- Built-in payments
- App Marketplace
- Customer loyalty
- Employee permissions
- Inventory
- Reporting

QuickBooks Online Connection

- Uses third-party connectors
- Can sync:
 - Sales
 - Deposits
 - Fees
 - Taxes
- Available detail depends on the connector chosen.

Considerations

- ✓ Excellent hardware
- ✓ Flexible hardware options
- ⚠ Features and integrations vary by reseller and app ecosystem.

Toast

Good Fit If: Think beyond restaurants. Hybrid businesses such as cafés, bakeries, wineries, and specialty food retailers may also be a good fit.

Built Specifically for Restaurants, growth expansion restaurant + retail (2023); food and beverage retail (2024), retail (2025)

Ideal For

- Restaurants
- Bars
- Cafes
- Food Trucks
- Quick Service
- Food & Beverage Retail
- Retail

Standout Features

- Kitchen Display System (KDS)
- Table management
- Online ordering
- Delivery
- Tip management
- Menu management
- Courses & modifiers

QuickBooks Online Connection

- Third-party integrations available
- Commonly sync: Daily sales, Tips, Taxes, Deposits
- Restaurant accounting requirements often require customized mappings.

Considerations

- ✓ Outstanding restaurant workflow
- ✓ Excellent labor management
- ⚠ Not designed for traditional retail.

Lightspeed X-Series

Good Fit If: Excellent for retailers with complex inventory, purchasing, or multiple locations. Spend time upfront discussing the integration strategy and reporting expectations.

Best for Inventory-Intensive Retailers

Ideal For

- Retail stores with large inventories
- Sporting goods
- Bicycle shops
- Pet stores
- Garden centers
- Specialty retailers
- Multi-location retailers

Standout Features

- Advanced inventory management
- Purchase orders
- Vendor management
- Matrix inventory
- Multi-location inventory tracking
- Customer loyalty
- Detailed reporting
- eCommerce capabilities
- Built-in analytics

QuickBooks Online Connection

- Sync Sales by Summary or by Product Categories
- Upon register close, sales, payments, discounts, Cost of Goods, Purchase Orders, Store Credit, Gift Card totals, On account Sales

Considerations

- ✓ Strong inventory capabilities
- ✓ Excellent purchasing workflows
- ✓ Well suited for growing retailers
- ✓ Multi-store functionality

⚠ Integration strategy should be discussed before implementation.

Revel (Shift4 Dine)

Good Fit If: Best suited for businesses with more complex operations. Make sure the client is prepared for a more involved implementation.

Best for Enterprise Retail & Restaurant

Ideal For

- Larger retailers
- Franchises
- Multi-location businesses
- Enterprise restaurant operations

Standout Features

- Advanced inventory
- Purchasing
- CRM
- Loyalty
- Enterprise reporting
- API integrations
- Centralized management

QuickBooks Online Connection

- Native & other Integration available through connectors and APIs
- Can sync: Sales, Customers, Inventory, Payments, Taxes
- Configuration is more customizable than many entry-level systems.

Considerations

- ✓ Highly customizable
- ✓ Scales well
- ⚠ Higher investment and implementation effort.

register by ability business

Good Fit If: If the client's priority is keeping inventory and accounting together in QuickBooks Online with real-time visibility, this is where register shines.

Best for retailers using QuickBooks Online

Ideal For

- Entrepreneurs
- Brick-and-mortar retailers
- Retailers already using QuickBooks Online
- Hybrid Retail + Service
- Businesses wanting accounting and inventory in one ecosystem

Standout Features

- Real-time QuickBooks Online synchronization
- Line Item Detail Receipts
- Sell by Weight, Random-weight barcode support
- Inventory managed directly in QuickBooks Online

QuickBooks Online Connection

- Unlike most POS systems, register was designed around QuickBooks Online.
- It syncs in real time: Sales with Line-item detail, Customers, Payments, Taxes
- Inventory remains in QuickBooks Online, providing immediate visibility without waiting for end-of-day updates.

Considerations

- ✓ Purpose-built for QuickBooks Online
- ✓ Real-time accounting visibility
- ✓ Minimal reconciliation
- ⚠ Designed specifically for retailers using QuickBooks Online rather than restaurant or service industries.

What Should Flow from the POS to QuickBooks?



	Summary	Detail
Sales Transactions	Daily Totals	Individual Transactions
QuickBooks Activity	Less Data	More Data
Reconciliation	Simpler	More Detailed
Reporting	Financial-Level	Transaction-Level
Inventory Visibility	Depends on Integration	Greater Visibility
Audit Trail	Limited	Complete
Best For	Financial Reporting Focus	Operational & Financial Visibility

When Summary May Make Sense

Typical Scenarios

- Client primarily reviews financial statements
- Minimal inventory complexity
- High transaction volume
- Focused on daily sales totals
- Simpler accounting workflow preferred



When Detail May Make Sense



Typical Scenarios

- Inventory is managed in QuickBooks
- Product-level visibility is important
- Customer purchase history matters
- Detailed reporting is desired
- Visibility is a priority
- Other Apps



Before Discussing Integrations, Ask: "What do you want to see when you open QuickBooks?"

"What do you want to see in QuickBooks?"

Because that answer often determines:

- Which POS is appropriate
- Which integration should be used
- How sales should sync
- How inventory should be managed
- What reports will be available
- How much reconciliation is required



Thank You



Contact us to start the conversation!

Helping Retail Clients Choose the Right POS

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