

Toast Exit Kit Checklist

Early termination notice · 30-day data export · Square / Clover switcher playbook
Independent guide for restaurant operators. **Not affiliated with Toast, Inc.** · Not legal advice.

Confirm against your paperwork. Fees, notice periods, and data rules depend on *your* Order Form and the current Toast Merchant Agreement (pos.toasttab.com/merchant-agreement; research notes cite update 2025-09-10). This PDF is a checklist, not a Toast quote or legal advice.

1. Early-termination fee (Merchant Agreement §8.4)

How the public agreement describes ETF:

- **Software Subscription:** remaining Software Subscription Fees for the term.
- **Pay-as-you-go:** \$150 × months remaining.
- A **software-financing processing fee** may also apply if you financed software.

Use the free calculator on the kit site with numbers from your Order Form only — never from a scrape.

- ☐ Find your Order Form: monthly Software Subscription Fee *or* Pay-as-you-go flag.
- ☐ Count months remaining in the current term.
- ☐ Run the ETF estimate; note financing fee separately if applicable.
- ☐ Decide: pay ETF and exit early vs. non-renew at term end (§8.1: typically ≥30 days written notice to non-renew; auto-renew often 1-year periods).

2. Early-termination / non-renewal notice steps

- ☐ Re-read your Order Form cancellation / notice clause (channel, address, email, required lead time).
- ☐ Draft written notice: legal entity name, Toast location IDs, desired end date, whether early termination or non-renewal.
- ☐ Send via the method Toast / your Order Form requires (and keep a copy).
- ☐ Save proof of delivery (email sent folder, certified mail receipt, portal ticket ID).
- ☐ Ask Toast in writing for: final ETF amount, last service date, hardware return / buyout terms, data export instructions.
- ☐ Calendar the **30-day data retrieval window** starting from termination (§8.5).

3. 30-day Merchant Data export checklist (§8.5)

After termination, you may request data retrieval within **30 days**. Toast may **irretrievably delete** Merchant Data after that window. Export early; do not wait until day 29.

Menus & catalog

- ☐ Menus / dayparts / channels (dine-in, online, catering).
- ☐ Items, SKUs/PLUs if used, prices, tax categories.
- ☐ Modifiers, modifier groups, nested options.
- ☐ Photos / descriptions you want to reuse (export or screenshot where UI allows).
- ☐ Out-of-stock / 86 lists and prep notes you rely on.

People & permissions

- ☐ Employee roster notes (names, roles) — rebuild permissions on the next POS; do not assume a clean export of credentials.
- ☐ Job codes / tip pooling rules written down outside Toast.
- ☐ Manager override PIN policy documented for the new system.

Sales & reporting history

- ☐ Export sales / labor / menu mix reports available in Toast's UI for the periods you need (tax, investors, bookkeeping).
- ☐ Store CSVs / PDFs in a dated folder you control (cloud drive + local backup).
- ☐ Confirm with your accountant what date range they need before cutover.

Hardware inventory

- ☐ List every terminal, handheld, printer, KDS, scanner, cash drawer — serials if possible.
- ☐ Mark owned vs leased / financed; note return shipping deadlines.
- ☐ Photograph cable layouts and network ports before tear-down.

Loyalty, gift cards, online ordering

- ☐ Gift card liability balance and how open cards migrate (or don't).
- ☐ Loyalty points / tiers — export or communicate wind-down to guests.
- ☐ Online ordering / third-party integrations: turn-down order and DNS / link updates.
- ☐ Payroll / tip integrations: last export before disconnect.

4. Square / Clover switcher playbook (high level)

Non-scraping. Build the new catalog from *your* exports and notes.

- ☐ **Week -3:** Pick Square or Clover (or other); open merchant account; order hardware with spare lead time.
- ☐ **Week -2:** Rebuild menu from your export checklist; map taxes, modifiers, and service charges.
- ☐ **Week -1:** Train one shift lead on the new POS; run a soft open for staff meals / closed-door tickets.

- ☐ **Cutover night:** Final Toast exports; switch guest-facing ordering links; test card payments end-to-end.
- ☐ **Day +1 to +7:** Watch tips, refunds, and online channels; keep Toast read-only access until data window work is done.
- ☐ **Before day 30:** Confirm all needed Merchant Data is saved offline; then close the Toast chapter.

5. Quick reference — agreement points cited

- §8.1 — Term / auto-renew / notice to non-renew (commonly ≥ 30 days written notice; 1-year renewals).
- §8.4 — Early Termination Fee (remaining subscription fees, or $\$150 \times$ months for pay-as-you-go; financing fee may apply).
- §8.5 — Data retrieval within 30 days after termination; possible irretrievable deletion afterward.

Source: <https://pos.toasttab.com/merchant-agreement>

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This document is a practical checklist for operators. It is not legal, tax, or accounting advice. Confirm every action with your Order Form, counsel if needed, and Toast support.