

THE RESTAURANT VENDOR SETUP MASTER CHECKLIST

INTRODUCTION: WHAT THIS REALLY TAKES

Setting up vendors is where operators go to die.

It sounds easy — “Just call Sysco and a linen guy.” — but this phase can destroy timelines and budgets if you don’t know what you’re doing.

Every vendor contract, every delivery schedule, every service frequency connects to another system.

You’ll have overlapping invoices, multiple reps calling you, deliveries stacking up, and nobody taking ownership.

This guide lists *everything* you’ll need — and what ROI Restaurant Consulting usually takes off your plate so you don’t lose your mind.

SECTION 1: FOOD & BEVERAGE VENDORS

These are your core suppliers — the lifeblood of your operation. Screw these up, and your margins are toast.

Broadline Distributor

- National providers like **Sysco, US Foods, PFG, Cheney Brothers, or Gordon Food Service**.
- Requires credit application, trade references, and signed pricing agreement.
- Negotiate **weekly order minimums, delivery days, split-case fees, and return policies**.
- Establish **dedicated delivery times** that don’t interfere with service hours.
- Set up **par sheets** tied to your ordering schedule.
- Track **pricing fluctuations** on key items weekly.

Produce Vendor

- Use a **local/regional produce supplier** for freshness and flexibility.
- Check **truck refrigeration logs** for compliance.

- Confirm **delivery frequency** (most produce is M/W/F).
- Ask for **seasonal availability chart** and backup item list.

Meat & Seafood Vendors

- Source at least **two vendors** for price comparison.
- Require **cut sheets, catch dates, and origin labeling**.
- Confirm they're **USDA inspected** and carry product liability insurance.
- Get **specifications in writing** for trim levels and grind ratios.

Bakery / Bread Supplier

- Coordinate with your menu schedule — deliveries before lunch service.
- Clarify **minimum orders and holiday schedules**.
- Verify **shelf life** of par-baked vs. fresh.

Dairy Supplier

- Confirm **temperature-controlled delivery**, not cross-loaded with other goods.
- Set up **milk rotation protocol** in coolers.

Specialty & Local Vendors

- Specialty foods (imports, spices, niche condiments).
- Local purveyors (honey, hot sauce, artisan bread).
- Requires manual ordering and invoice coding — no automation.

Beverage Distributors

- **Soft drinks:** Coca-Cola, Pepsi, or local fountain distributor — includes CO2, lines, and maintenance.
- **Alcohol:** Beer, wine, and spirits require separate accounts, permits, and in some states, bonded storage.
- **Coffee Vendor:** Espresso machine lease or purchase, training, grinder calibration, and maintenance contract.
- **Ice Supplier:** Set weekly drop schedule and machine maintenance plan.

ROI Note:

This entire category is where ROI saves most owners 10–15% in their first year. We already have national contacts and pre-negotiated pricing structures. We set up accounts, coordinate deliveries, and ensure you never run out or over-order.

SECTION 2: SANITATION, CHEMICALS & LINENS

This section touches everything from guest impression to health code compliance.

Linen & Towel Service

- Providers: **Cintas, Alscos, UniFirst, or Aramark.**
- Set up **weekly pickup/delivery**, track **missing item reports**, and verify **inventory counts** weekly.
- Negotiate **minimum spend and replacement policies.**

Uniform Provider

- Options: Rental or purchase.
- Ensure all garments meet **brand standards** and are easily replaceable.
- Keep **2-week backup inventory** for new hires.

Chemical Vendor

- Critical for dish machine chemicals, sanitizers, floor cleaner, and degreaser.
- Vendors include **Ecolab, Auto-Chlor, or Diversey.**
- Schedule **quarterly maintenance visits.**
- Track **MSDS sheets** for every chemical in use.
- Ensure **auto-dosing systems** are calibrated to prevent waste.

Dish Machine Lease

- Avoid buying outright unless you're high-volume.
- Include **24/7 emergency service** in the contract.

- Confirm **wash temperature logs** meet health department standards.

Pest Control

- Monthly service minimum.
- Must cover **insects, rodents, and flying pests**.
- Require **service logbook** accessible for inspectors.
- Verify vendor has **state pest license and insurance**.

Waste Management

- Trash, recycling, and grease.
- Confirm **bin sizes, pickup frequency, and gate access**.
- Lock bins to prevent illegal dumping.
- Coordinate with **grease trap vendor** on pump-out schedule.

Grease Trap Cleaning

- Usually every 90 days (varies by city).
- Require vendor to **provide documentation** after each service.
- Always **keep copies of pump-out receipts** for health inspections.

ROI Note:

ROI sets up all sanitation vendors, negotiates pricing, and builds your compliance binder. We also coordinate your cleaning schedule so your vendors never overlap with peak hours.

SECTION 3: FACILITIES & MAINTENANCE

These vendors are invisible until something breaks — and by then it's too late.

HVAC Service

- Quarterly maintenance contract.
- Confirm **filter replacement frequency and refrigerant type**.

- Require vendor to label all units with ID tags for tracking.

Plumbing & Electrical

- On-call relationship with two vendors each.
- Ensure **after-hours emergency rates** are in writing.
- Keep **main shut-off valve** map laminated near kitchen.

Fire Suppression & Hood Cleaning

- Semi-annual service required by code.
- Confirm **UL-300 certification**.
- Require **post-cleaning documentation** and before/after photos.
- Schedule cleaning after hours or on dark days.

Refrigeration & Equipment Repair

- 24/7 emergency response required.
- Contract should cover **diagnostics, parts, and travel fees**.
- Label each piece of equipment with vendor contact info.

Smallwares & Equipment Vendors

- Maintain relationships with **Restaurant Depot, Webstaurant, Wasserstrom**, and local distributors.
- Track **inventory depreciation** for tax deductions.

ROI Note:

ROI builds your maintenance network for you — HVAC, refrigeration, hood cleaning, pest, and repair vendors.

We use verified providers who show up on time, provide documentation, and actually answer their phones.

SECTION 4: TECHNOLOGY, SECURITY & SOFTWARE

This is where most owners are completely lost.

You'll have overlapping systems that don't talk to each other unless someone configures them properly.

POS System

- Choose based on service model (Toast, Square, Aloha, Lightspeed).
- Configure menu, modifiers, reporting, and employee roles.
- Set up **tip reporting and payroll integration**.
- Test receipt printers and kitchen display screens.

Merchant Processor

- Negotiate rates — 2.6–2.9% average.
- Avoid “free POS” contracts; they're markup traps.

Payroll & Scheduling

- ADP, Paychex, Gusto, or 7shifts integration.
- Configure **overtime rules** and **state-specific labor compliance**.

Security & Cameras

- Install **cloud-based video system** with mobile access.
- Add **door and alarm monitoring**.
- Post **privacy signage** if required by state law.

Internet, Phones & Wi-Fi

- Business internet with static IP for POS.
- Separate guest Wi-Fi network.
- Backup 4G modem for downtime.

Music Licensing

- Required for any public space playing music.
 - Register with **BMI, ASCAP, or SESAC**.
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ROI Note:

ROI configures your tech stack — POS, payroll, scheduling, cameras, and Wi-Fi — to actually work together.

We eliminate duplicate systems and get you running day one without technical chaos.

SECTION 5: PROFESSIONAL SERVICES & ADMIN

Every successful restaurant has a back office that's as organized as the kitchen.

Accounting & Bookkeeping

- Choose someone who understands restaurants, not just small business.
- Set up **daily sales summary**, **bank reconciliation**, and **invoice entry** processes.

Insurance

- General liability
- Property and equipment
- Liquor liability
- Workers comp
- Cyber and data breach coverage (yes, seriously)

Legal

- Restaurant attorney for lease review, licensing, and HR compliance.
- Maintain copies of **permits, inspection reports, and employee documents**.

Human Resources

- Employee handbook
- Disciplinary policies
- Benefits and PTO tracking
- Payroll records storage

Marketing & Advertising

- SEO firm, digital ad manager, and local print vendor.

- Photographer/videographer for menu items.
 - Social media manager for daily posting and engagement.
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ROI Note:

ROI handles professional vendor onboarding — insurance, HR, accounting, and marketing partners.

We connect you with the right pros so you don't get burned by overpriced "restaurant experts."

SECTION 6: UTILITIES, PERMITS & COMPLIANCE

Utilities

- Water, gas, electric, waste, internet.
- Set auto-pay and paperless billing to avoid missed payments.

Permits & Licenses

- Business license, health, occupancy, fire, liquor, signage, music, resale certificate.
 - Maintain a **compliance binder** with expiration dates.
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ROI Note:

ROI manages your permitting checklist and keeps your compliance documents up to date. You'll never fail an inspection because of an expired license again.

FINAL CHECKLIST SUMMARY

If this feels insane, that's because it is.

Each vendor has to be vetted, set up, documented, and maintained. One missed account can delay your opening by weeks.

ROI Summary

ROI Restaurant Consulting – www.roirestaurantconsulting.com

Restaurant Start-Ups • Turnarounds • Project Management • Remodels

ROI Restaurant Consulting handles:

- Vendor research and pricing
- Account setup and credit applications
- Service scheduling
- Inspection documentation
- Invoice tracking
- Compliance management

We build your operational backbone before you ever unlock your doors.

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