

Training checklist

Go through the following checklist with managers and staff before launching Lightspeed Restaurant at your business as a guide for reviewing important workflows and topics.

Administrative tasks

- Log in to the Lightspeed Restaurant POS (K) app
- Start a shift*
- Clock in to the Lightspeed Restaurant POS (K) app
- Count cash float and open cash drawer
- End a user shift*
- Print closing reports and follow closing procedures*
- Adjust the sales restriction on a particular product*
- Toggle between configurations

Basic table and order management

- Navigate through the the screens and sub-screens to view all items
- Open a table and place an order
- Use the keypad to change the quantity of items to add to an order
- Use the item edit function to change the quantity of an item
- Delete an item from an order
- Use the search function to search for a product
- Add a note to an item
- Apply a discount to an item or an order*
- Go to a table using the tables screen
- Go to a table using the keypad
- Adjust the number of seats on a table
- Assign orders to a specific seat
- Move an item from one seat to another

Advanced table and order management

- Change the amount of covers on an account
- Transfer an item from one order to another
- Move an order to another table
- Start a bar tab and a takeout/delivery order
- Use the orders tab to find your tab, takeaway and delivery order
- Place an order with different courses
- Change the course of an item
- Send an entire order and individual courses to the kitchen
- Using the tables tab, find out what course a table is on
- Determine how long a table has been seated for

Manage bills and payments

- Print a receipt
- Accept payment and close an order
- Retrieve a closed receipt*
- Refund a closed receipt*
- Void a receipt*
- Split a bill by seat
- Split an item between different bills
- Move an item from one bill to another
- Split bill into equal parts
- Print split receipts
- Apply multiple payment types to a receipt
- Add a tip to a closed receipt
- Refill a gift card
- Pay using gift card
- Check gift card balance

*task typically performed by a supervisor or manager