cloudscape

ELEVATE YOUR BUSINESS

Lightspeed Retail Front-End Handbook

Version 1.1

Contents

1.0 Introduction to the Lightspeed Retail iPad App

The Lightspeed Retail POS App is a point of sale (POS) for iPad that lets you make sales, accept payments, and deliver best-in-class customer experience.

The goal of this guide is to provide you with instructions on how to use your Lightspeed Retail App as POS.

Note - Make sure you have network connection while using Lightspeed Retail through iPad or Laptop.

2.0 Let's get started

To get started with using Lightspeed Retail POS App, it should be installed and configured in your Ipad.

2.1 Sign In

- To log in to your Lightspeed Retail account on your iPad, you need to have your Lightspeed Retail login credentials.
- Open the **Retail POS App**
- From the Sign In screen, enter your **username** and **password**
- Tap **Sign In**
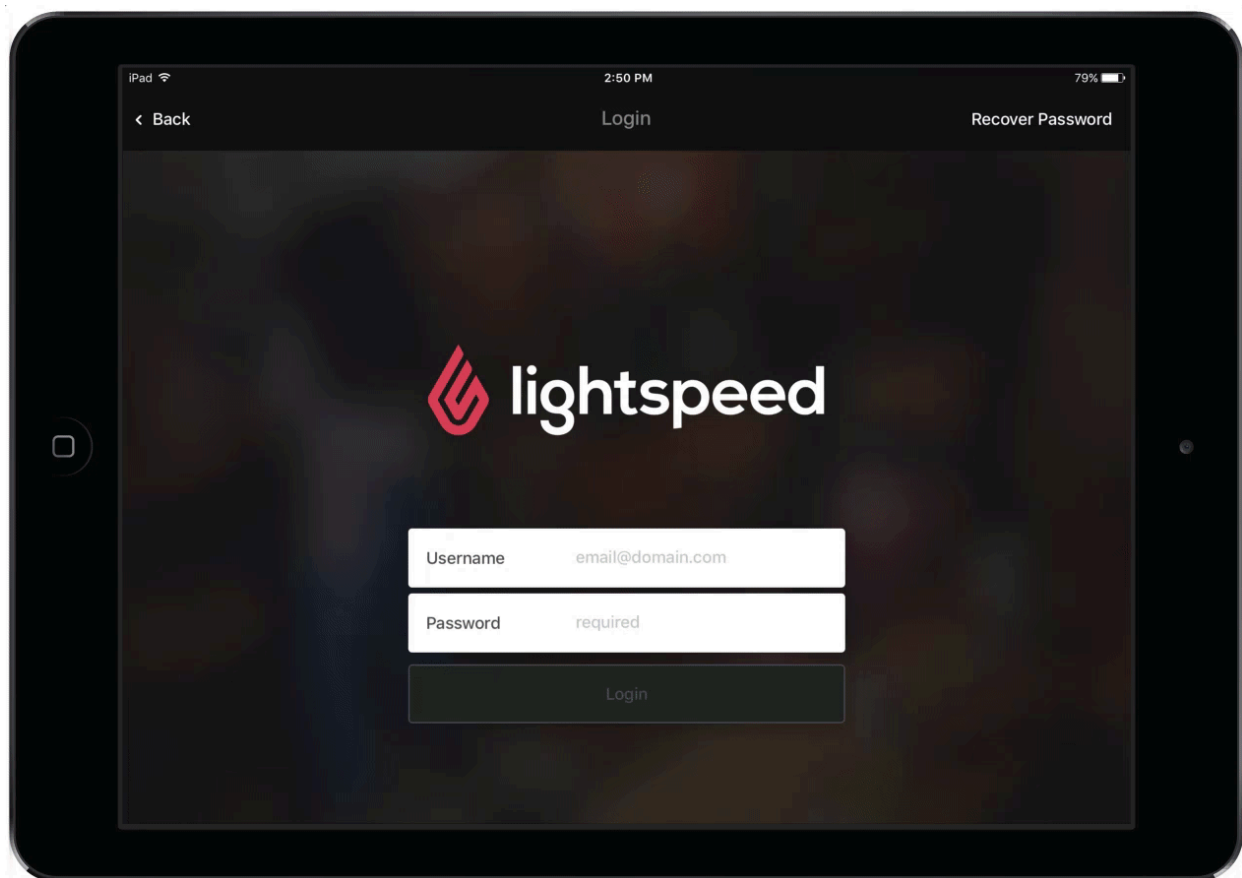
2.2 Forgot your password?

In order to reset your password, your login username must be a valid email address.If your username is not a valid email address, please contact Cloudscape Support at *support@cloudscpe.ae* to reset your password.

- From the top-right of the sign in screen, tap **Recover Password**
- Enter your email address.
- Tap **Reset Password**.Lightspeed will send a Lightspeed Retail Password Reset email to your email address with instructions on how to reset your login password.
- From your iPad's web browser (e.g. Safari), open the Lightspeed Retail Password Reset email.
- Tap the Password Reset Link.Within your iPad's web browser, the link will redirect you to the Retail Sign In screen
- In the **New Password** and Verify fields, enter your new password.
- Tap **Reset Password**. This will sign you into your Retail account (still within your iPad's browser).
- Open the Retail POS App.
- From the Sign In screen, enter your **username** and **Password** & tap **Sign In**
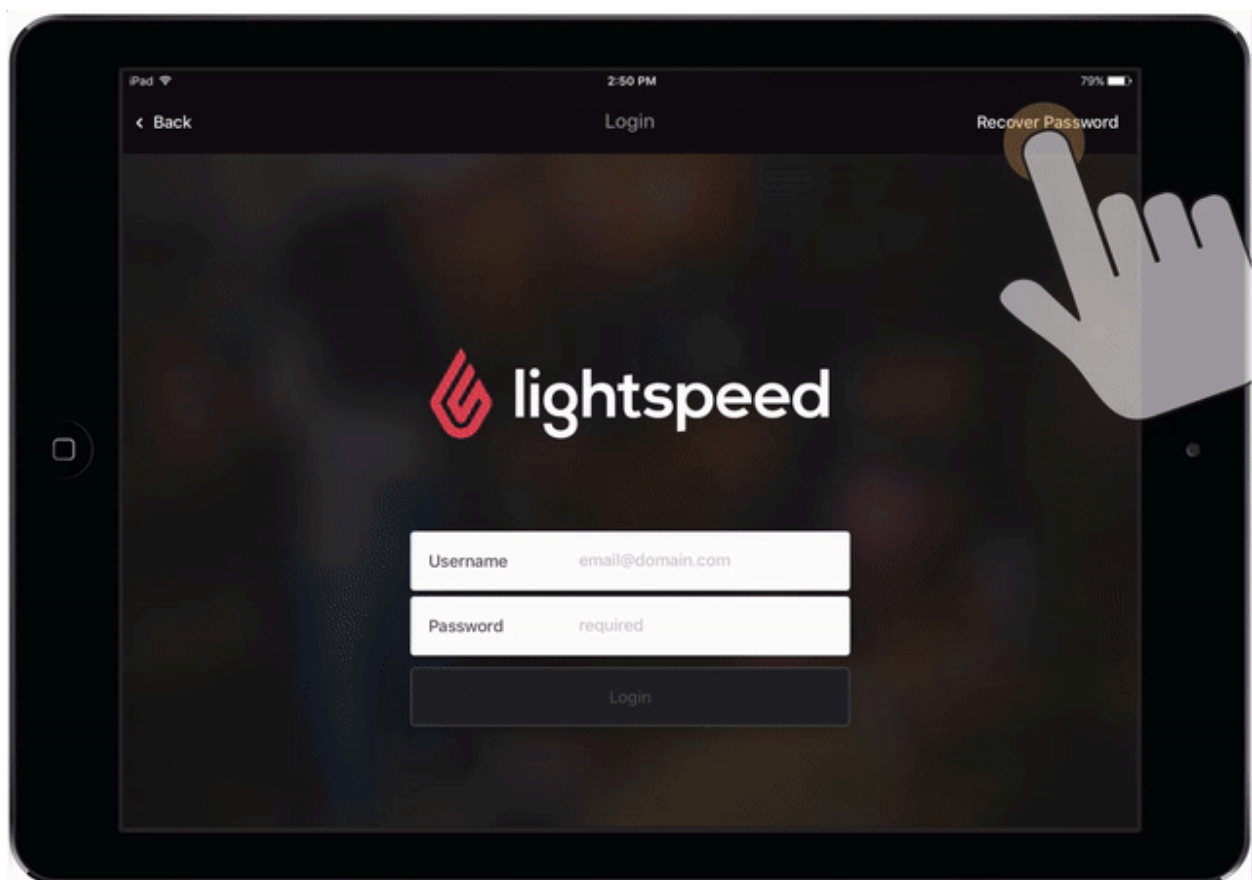
2.3 Clocking In & Clocking Out

Clocking in and out at the start and end of your shift is an important process within Lightspeed Retail.

- From the main menu, tap the **Clock** icon
- Enter your employee's **PIN**
- Tap **Clock In/Out**
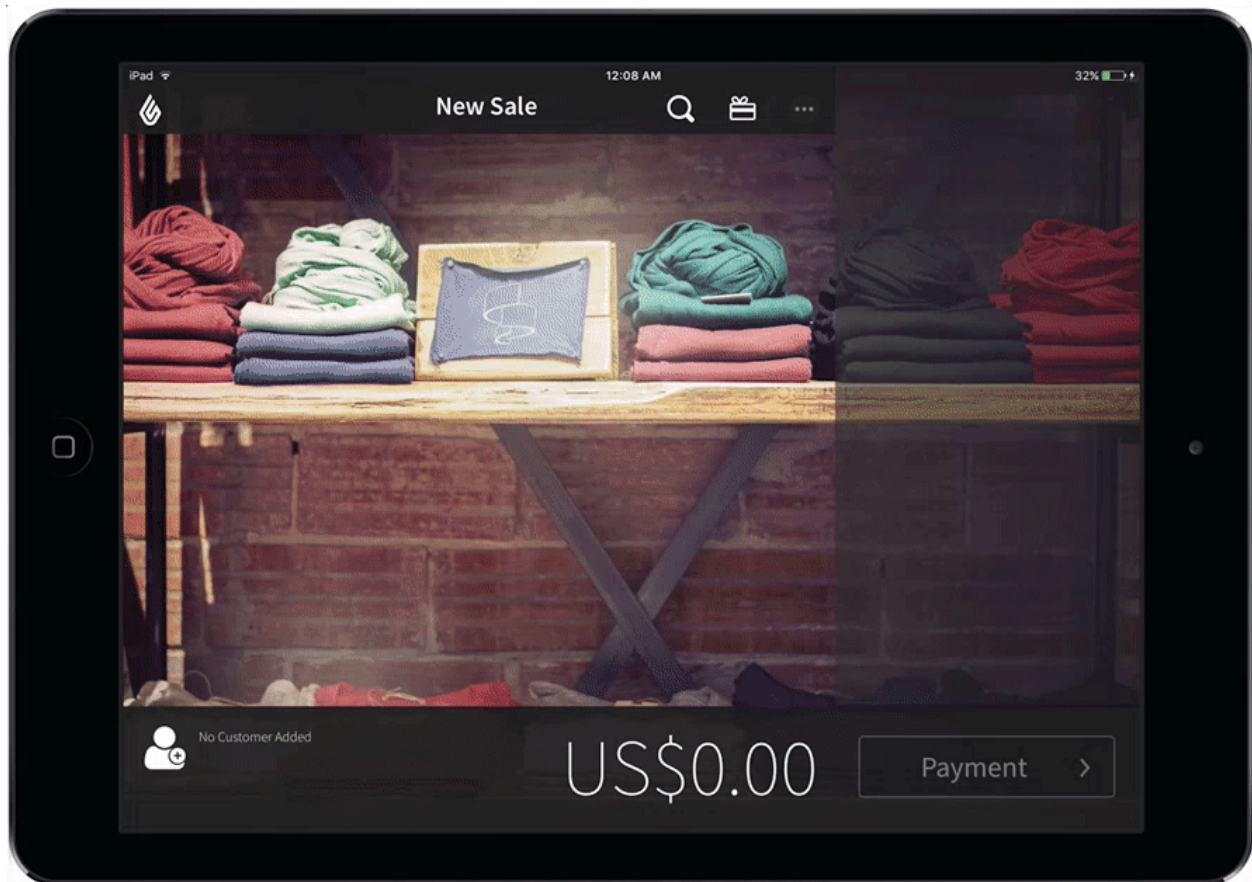
2.4 Locking the register

- Open Retail POS.

- From the main menu, tap **Lock**
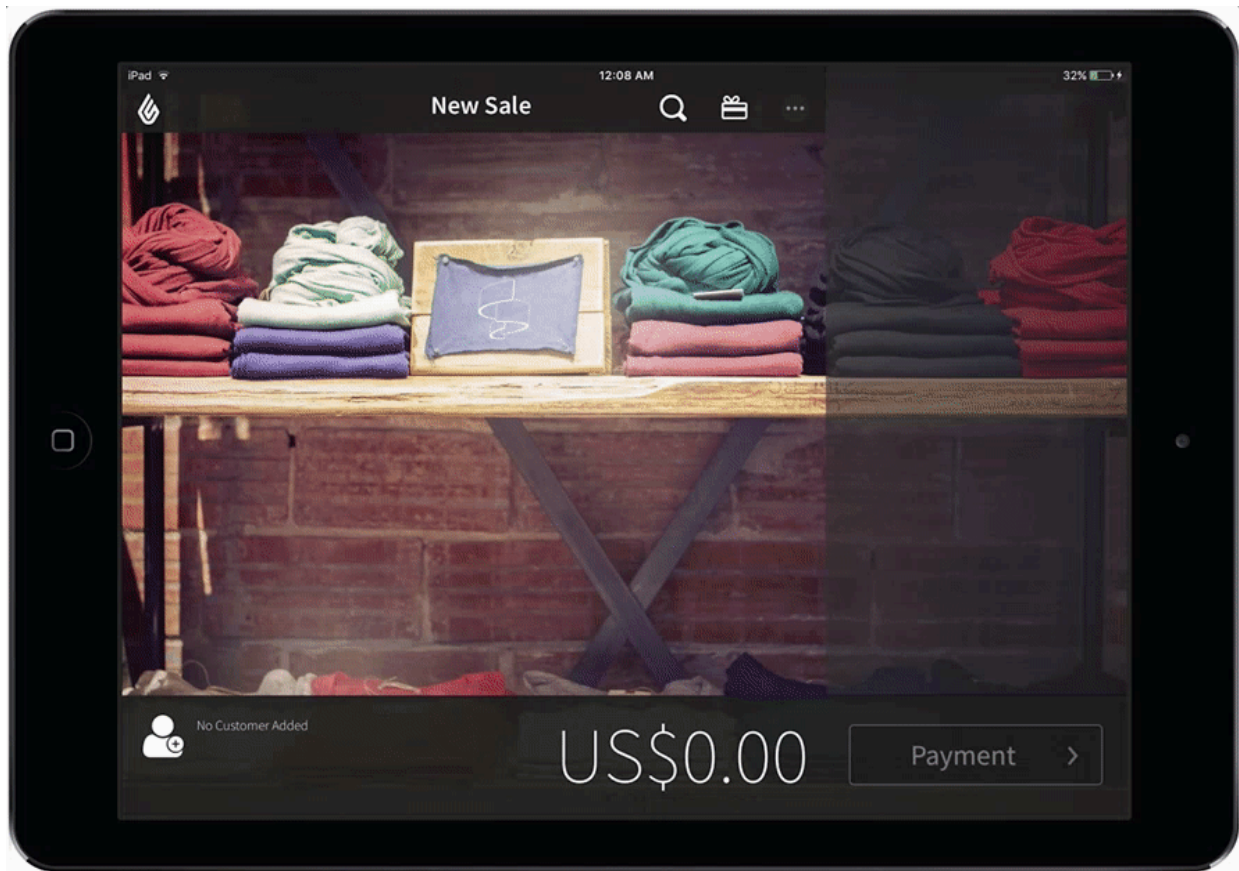
2.5 Recommendations

- Sign in at the start of your shift.
- Clock in once you're signed in.
- Lock the Lightspeed Retail App once you're done with your sale, in case it hasn't locked automatically.
- Remember to clock out as you leave the store at the end of your shift.
- Never share your passwords & PINS with anyone else.
- Use your own user credentials and/ or PIN while Login.

3. Managing Registers

3.1 Open a Register

At the start of each business day, you must open your register and add opening float in Retail POS.

- Select a **shop** and **register**.
- Tap your **shop**.
- Tap **Open Register** for the register you want to open.
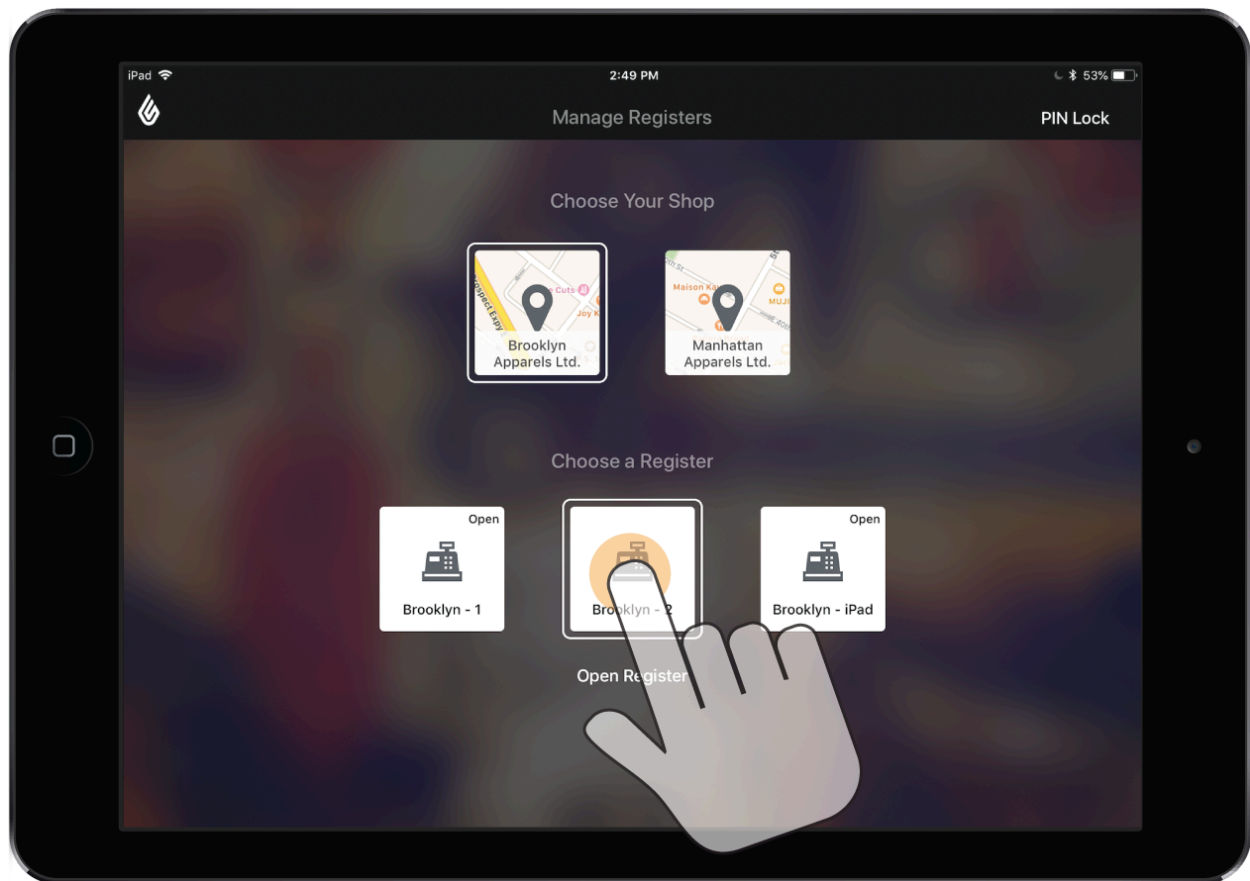
- Enter an **amount** for each cash denomination.
- Tap **Open Register**

$20	5
$10	5
$5	6
$1	8
25¢	40
10¢	10
5¢	20
1¢	0
Counted	US$200.00

Notes
Withdraw amount at 12pm please
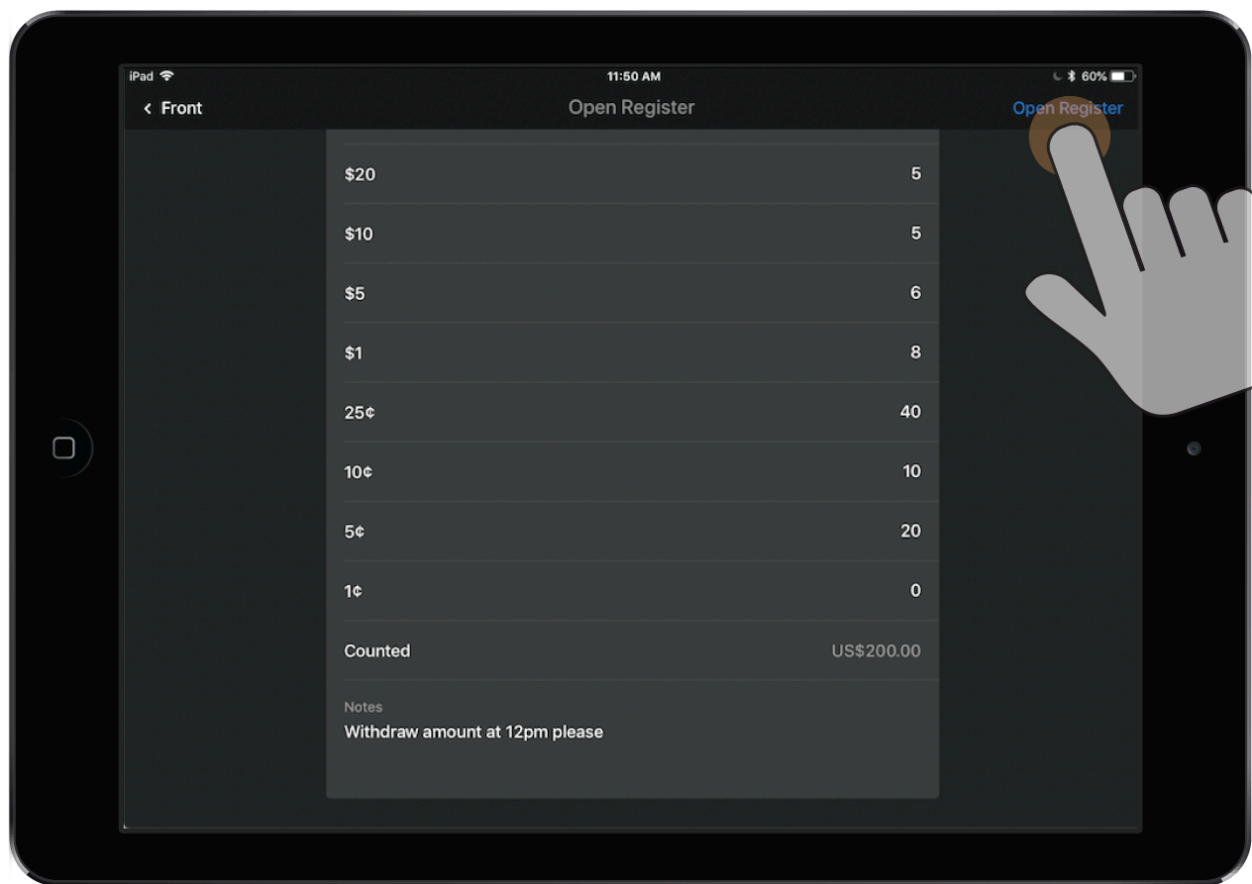
3.2 Close a Register

At the end of the day, close your register to see any shortages or excess of funds in your cash drawer.

- From the main menu, tap **Manage Registers**
- tap **Close Register**
- Enter an amount for each cash denomination.
- For other payment types, enter the total amount for each payment type
- tap **Close Register**
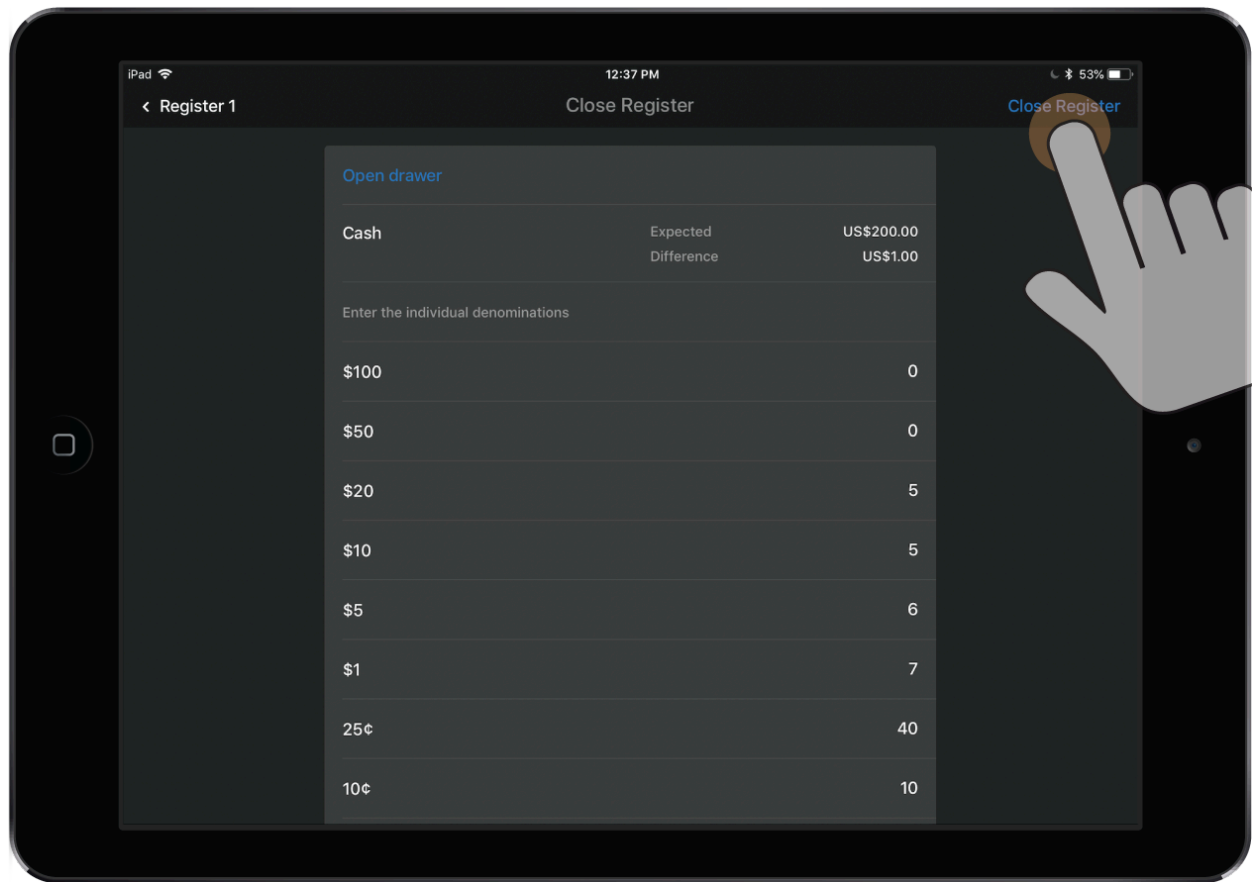
3.3 Switch Registers

If you accidentally selected the wrong register for the computer, to switch to the correct register,

- From the main menu, click **Retail Manager** > **Sales** > **Switch Register**
- Choose the **Register.**

3.4 Payout/ Drop

When you need to remove money from the register, use a payout

- From the main menu, click **Retail Manager** > **Sales** > **Payout/Drop**.
- Enter the **denominations** you're removing.
- Enter a **note** for the payout in the *Note* field.
- Click **Withdraw** and remove the amount.

Register 1: Payout

Pay Out	AED 1000 ×	
	AED 500 ×	
	AED 200 ×	
	AED 100 ×	
	AED 50 ×	
	AED 20 ×	
	AED 10 ×	
	AED 5 ×	
	AED 1 ×	
	AED 0.50 ×	
	AED 0.25 ×	
	Extra	AED 0.00
	Total	AED 0.00
Type	Cash ▾	

3.5 Add Amount

Use add amount to add cash to the register for any purpose other than opening the register.

- From the main menu, click **Retail Manager** > **Sales** > **Add Amount**.
- Enter the **denominations** you're adding.
- Enter a **note** for the add amount in the *Note* field.
- Click **Add** and add the amount.

3.6 Recommendations

- It's always a good practice to maintain fixed amount for opening and closing float everyday.
- While closing register at the end of each business day, in case of excess amount it should be taken out and print the payout receipt for the internal records.
- ******Only one register should be user per device.

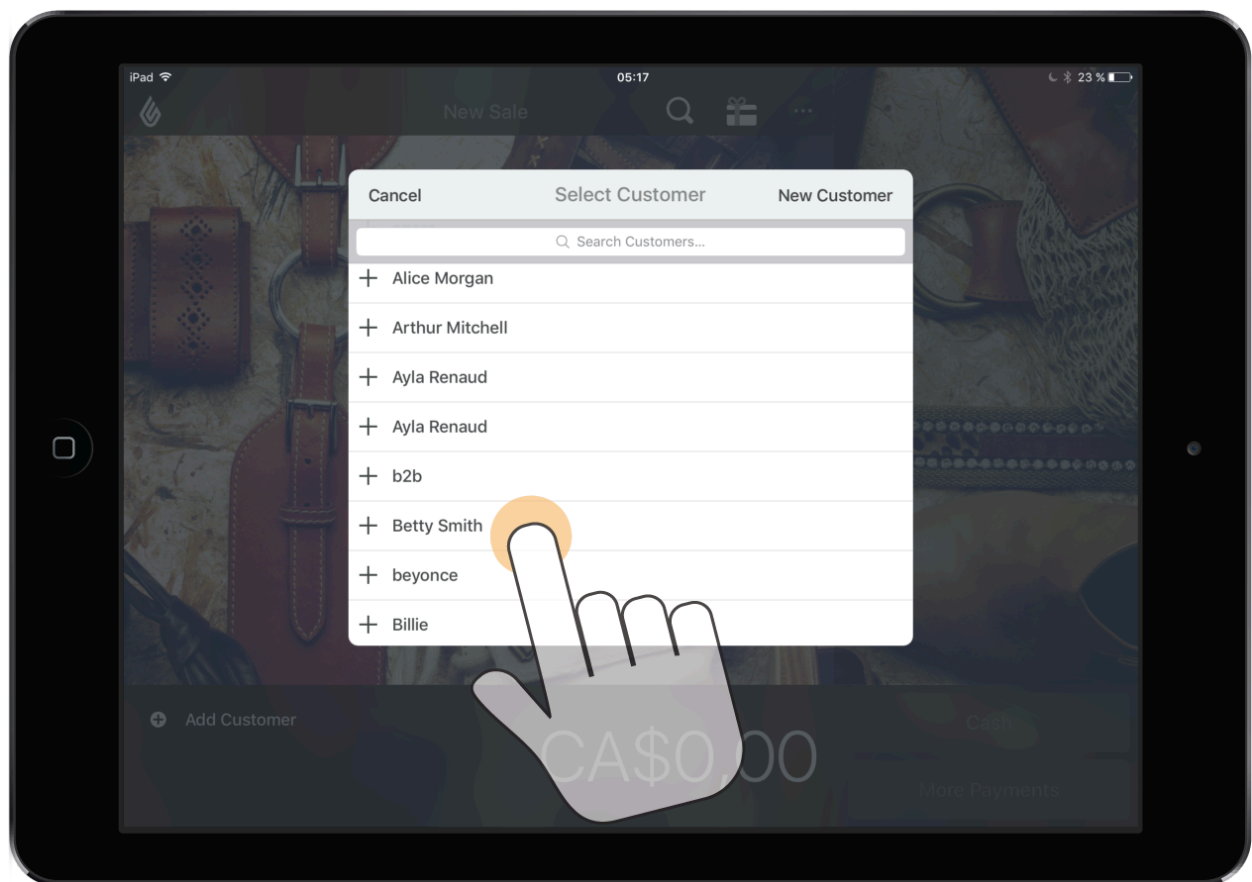# 4. Making Sale

4.1 New Sale

- To start a new sale, from the main menu, tap **New Sale**.
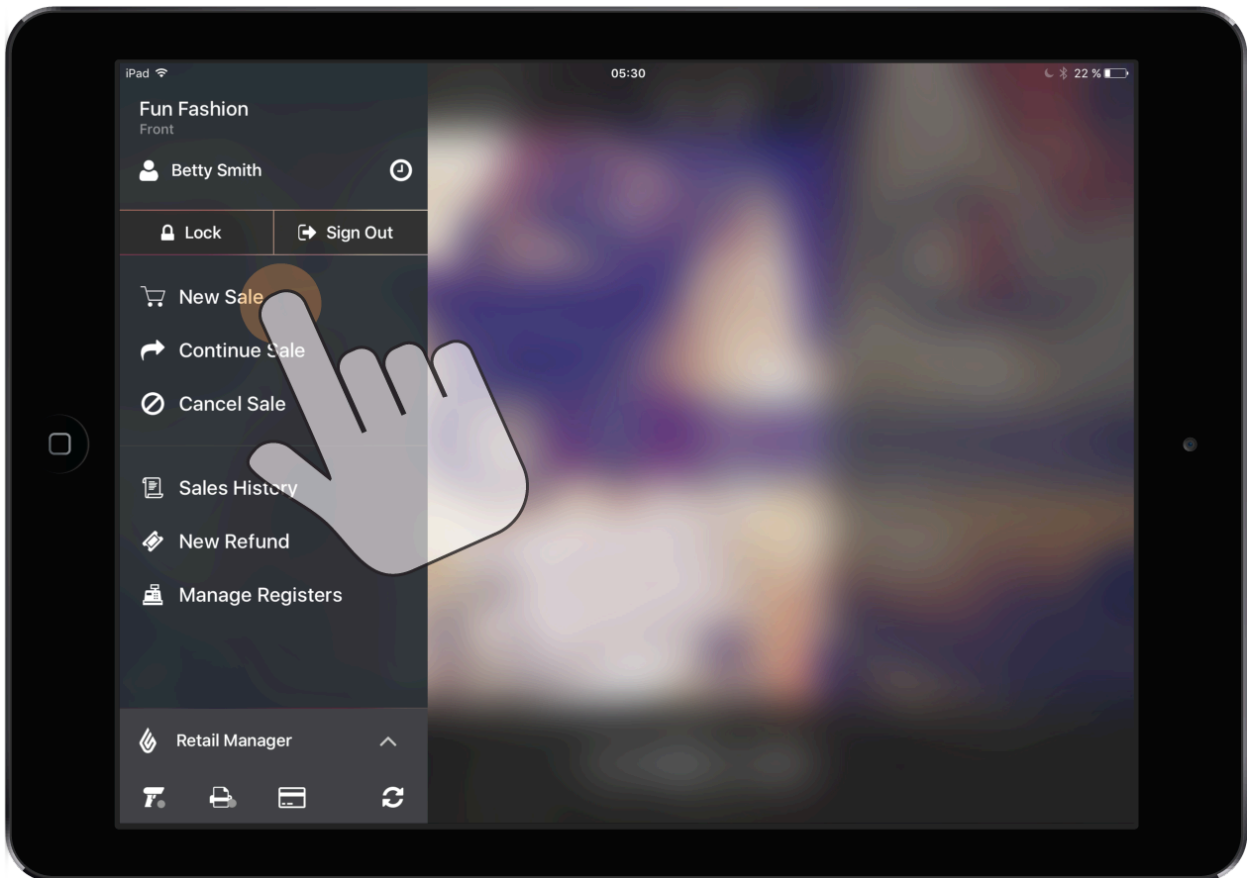
- To add a customer to the sale, type a customer name in the **Search Customer** field.
- To add a new customer click **New Customer**,
- Enter customer details.
- Click **Done**.

- To add items, you can use your barcode scanner or enter search items in the Item field and press the **Search** button.
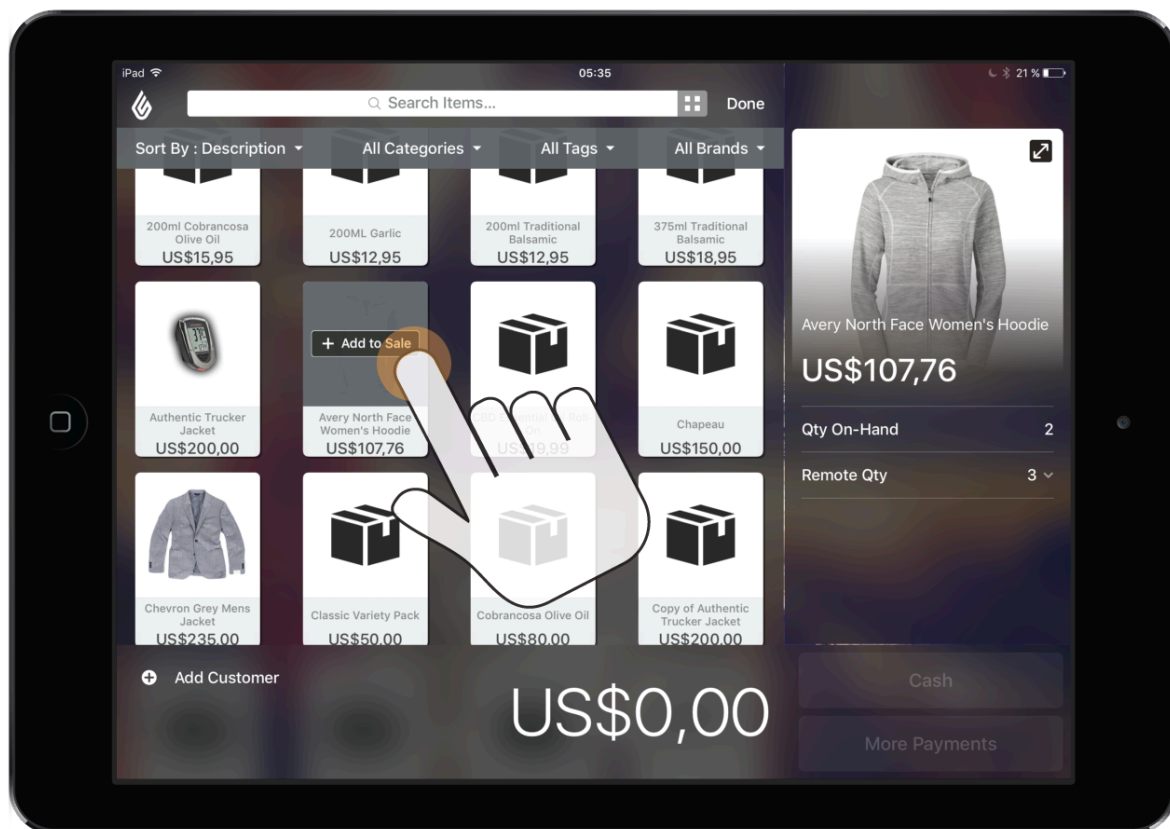
- To adjust the quantity of an item in *Line Item* view, tap the **+** or **-** icon of the desired item.
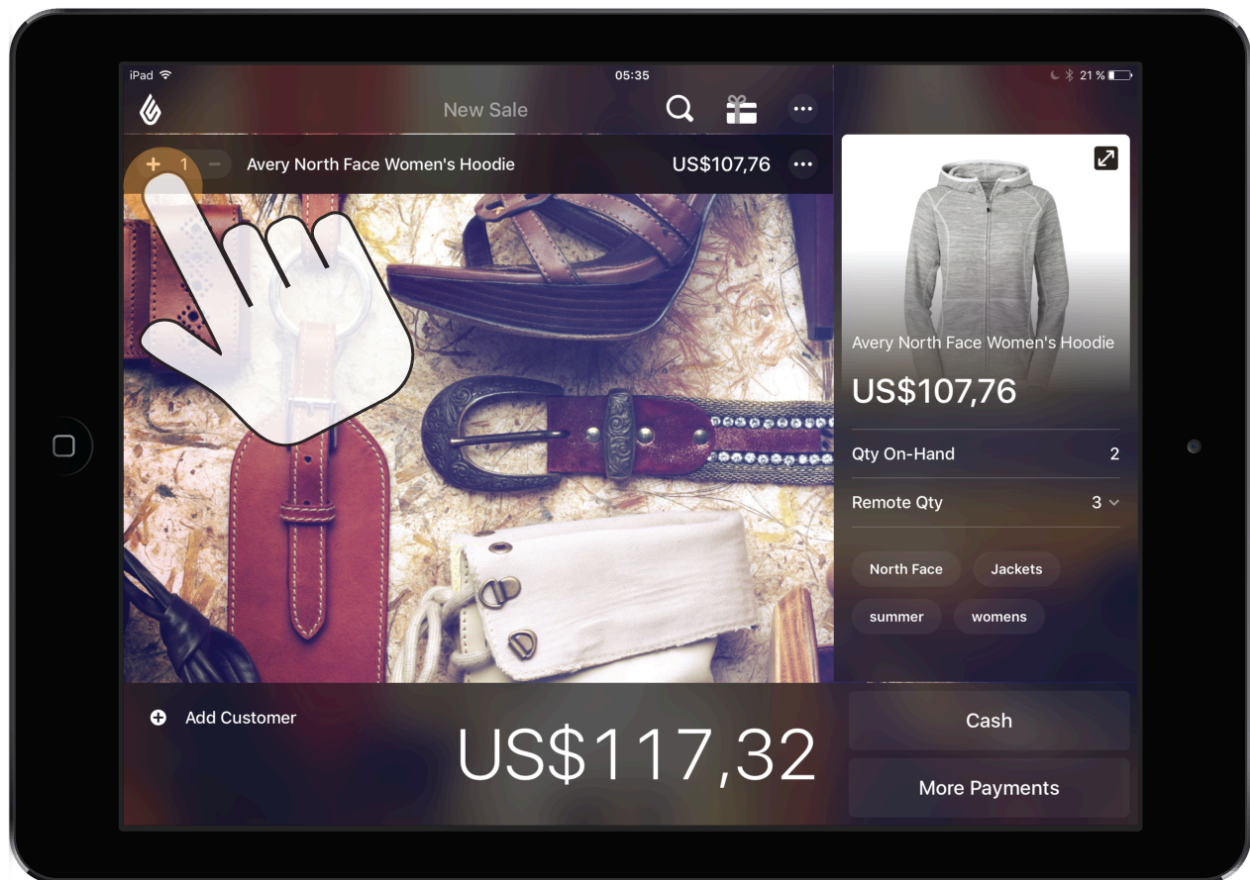
- From the top bar of the sale, tap the **...** icon, tap **Apply Discounts**, Apply **Employee** or **Set Tax** From the list.
- Click **Cash** or **More Payment** to process the payment
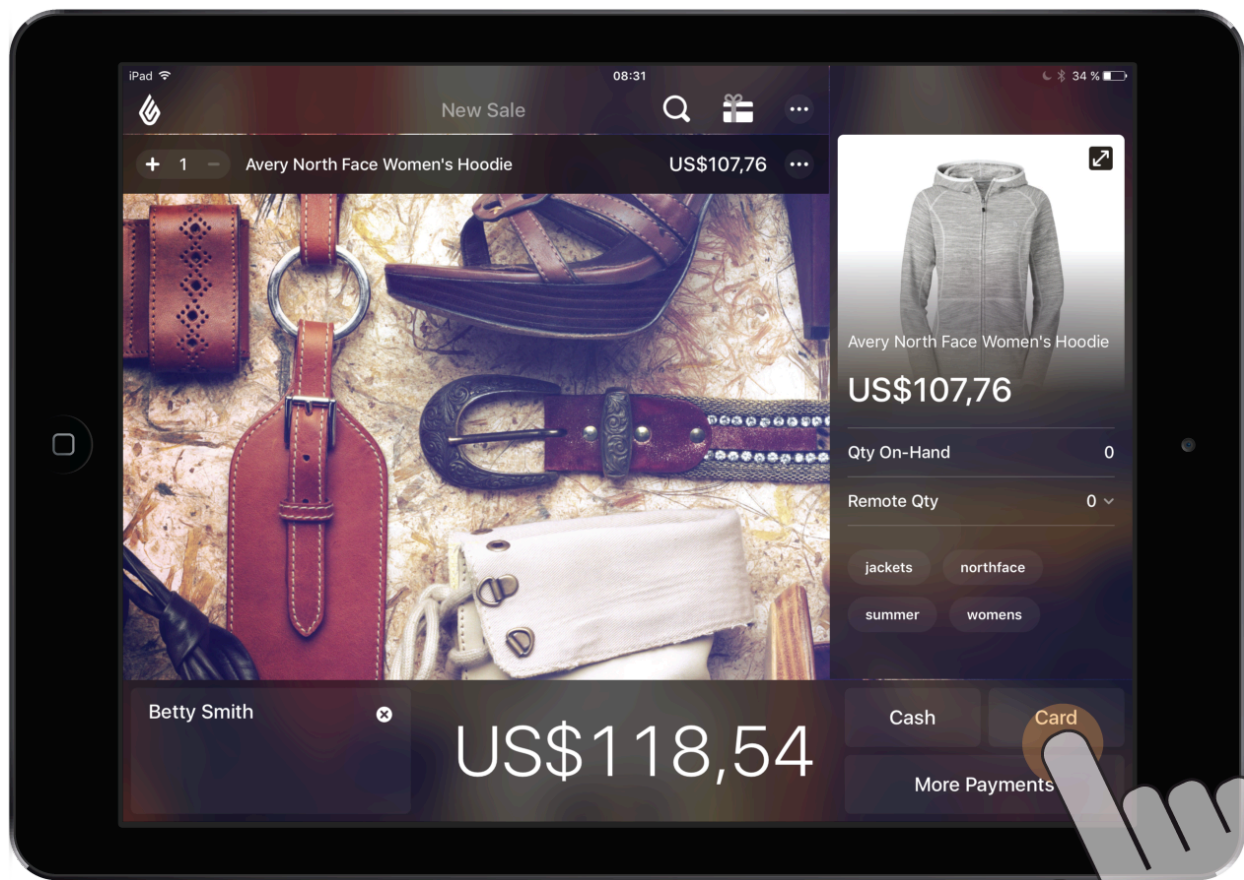
- Click **Finish Sale**.
- You can end the sale by printing or emailing the receipt.
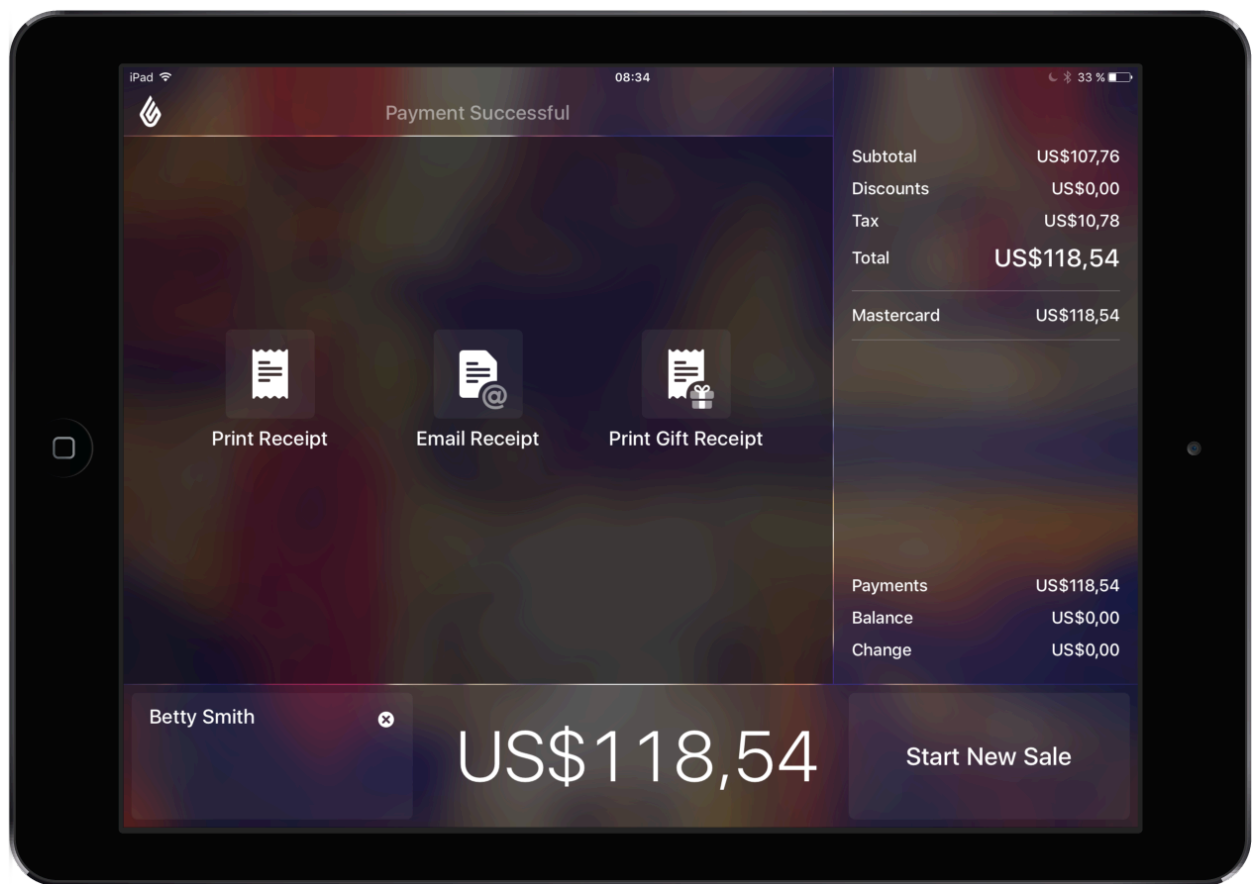
4.2 In Progress Sale

- From the main menu, tap **Sales History**.
- From the list, tap the **In progress** sale that you want to access.
- Tap **Reopen**.
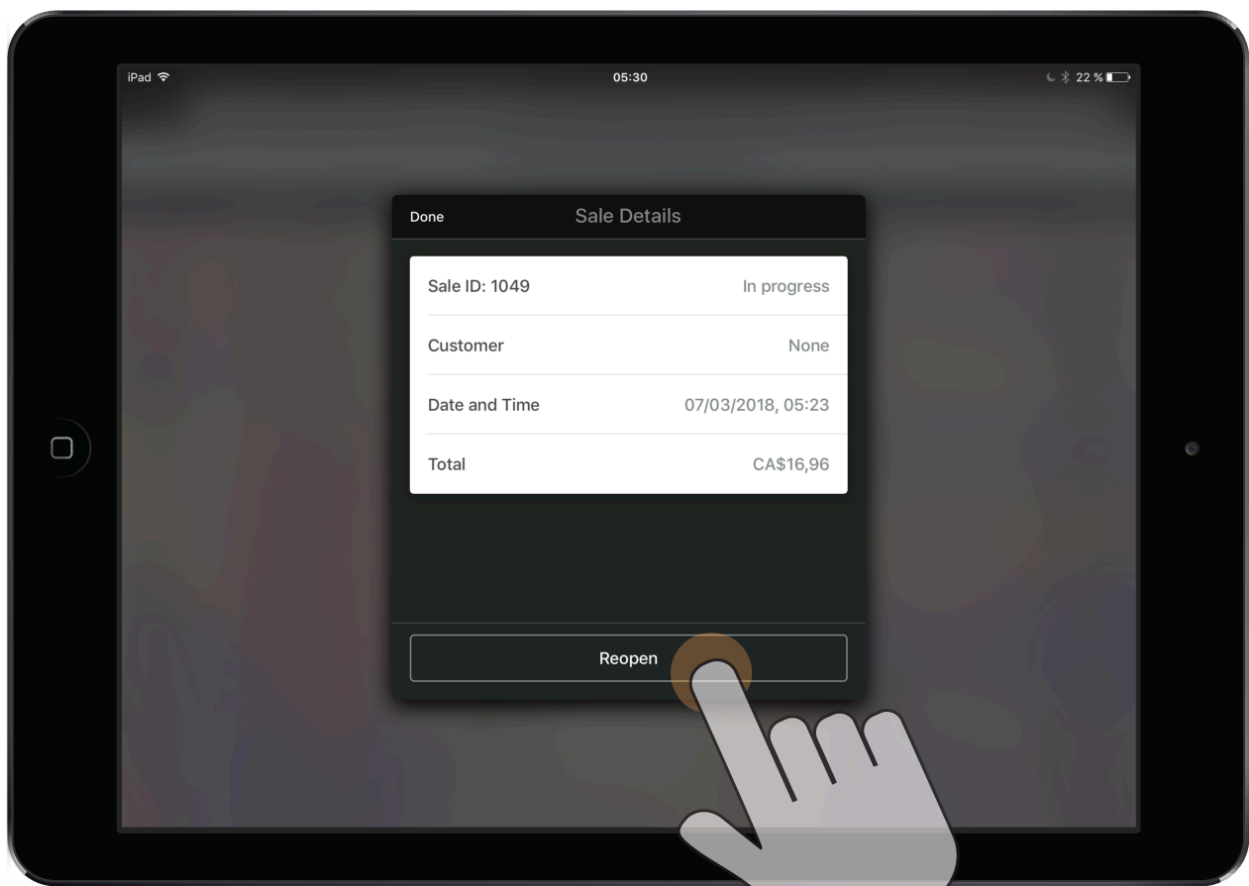
4.3 Creating a Layaways

You can offer customers the ability to put items on layaway. This is a useful way to let shoppers pay for an item in instalments. A layaway can apply only to products that are in stock

- From the main menu, click **Retail Manager** > **Sales** > **Layaway** and attach a customer to the sale.
- Search for the item you want to layaway.
- When you've added all the items to the layaway, click **Add Deposit** or **Payment** and enter the amount.
- Choose the **payment type.**
- Click **Finish Sale**.

4.4 Cancelling a Layaways

Cancelling a layaway does not remove any deposits. If you need to refund deposits go to To cancel and refund a layaway.

- From the main menu, click **Retail Manager** > **Sales** > **Layaway**
- Reopen the order
- Click, **Cancel Sale.**

4.5 Creating a Special Order

4.5.1 To put items on special order

- From the main menu, click **Retail Manager** > **Special Order** and attach a customer to it.
- Attach the items to the sale and click **Payment**.
- To take an optional deposit, click **Add Deposit** and enter the amount. Choose the payment type and click **OK**.
- Click **Finish Sale**.

4.5.2 To put items from a sale on special order

- If you've added items to a sale and want to put them on special order, in the sale, under all the items click **Special Order All**. To add individual items only, for each item you want to special order, click the item and from **Move To**,select **Special Order**.
- When you've added all the items to the special order, click **Payment**.
- Click **Finish Sale.**

4.5.3 To add payments or deposits to a special order

- Search for a customer's special orders by barcode or customer name.
  - If the customer has a receipt or an account deposit receipt, scan the barcode on the receipt into the *Item* field.
  - Associate a new sale with the customer. The number of items they have on special order is displayed at the top of the page.
- Click the **Special Orders** to see the items on special order.
- Click **Payment**.
- The payment screen displays the total the customer has on deposit in their account.
- Click **Add Deposit** or **Make Payment** and enter the **amount**.
- Choose the **payment type** and click **OK**.

- Click **Finish Sale**.

4.6 Issuing a refund or exchange from a transaction

4.6.1 Finding the transaction

Find the transaction by scanning your customer's receipt, searching for your customer's name or doing a search in the Lines report.

- **Receipt:** Every Lightspeed Retail sales receipt has a barcode. If your customer has their receipt, scan the barcode into the Item field in the register. The original transaction appears in the register in the Refund tab.
- **Customer name:** In a new sale, attach your **customer** and click the **Edit** button. In the left menu, click **Sales** and search for the **item**. Click the **ID** beside the item, and click the Refund button to open the transaction in the **Refund** tab of the register.
- **Lines report:** From the main menu, click **Reports > Lines**. In the date field, enter the **date range** of when the transaction occurred. You may have sold this item multiple times in the same day so be careful to select the correct transaction. In the ID field, you can also enter the last digits of the sales receipt's Ticket number. Browse the results to find the item and sale. Click the **ID** beside the item and click the Refund button to open the transaction in the **Refund** tab of the register.

4.6.2 To issue a refund

The register displays the original transaction with the items on the sale.

- **If you are issuing a refund to a customer account:** Make sure your customer is attached to the register. If not, search for your existing customer's **name** or click the **+New** button to create a new customer account. Click the **Refund** button next the returned items. Confirm that the refund's Total is correct and click **Payment > Account**. The Refund To Credit Account field will default to the refund's Total. Edit the **amount** if necessary. Click **Refund > Finish Sale**. The refund is now officially applied to your customer's credit account and the items are returned to your store's inventory.
- **If you are issuing a regular refund:** Click the **Refund** button next the returned items. The refund's Total on the right is calculated automatically and is negative, indicating it is due to your customer. Click **Payment** and click **Max** or enter an **amount** for the appropriate payment types. When the remaining Balance is 0, complete the refund and return the items to your inventory by clicking **Finish Sale**.

4.6.3 To issue an exchange

The register displays the original transaction with all the items on the sale. To add an item to the sale for exchange, add an item as you would for a normal sale.

- If the returned item value matches the value of the item given in exchange, you can **finish the sale.**
- If items given in exchange has a greater value than returned items, add a **payment.**
- If the items given in exchange have a lesser value than the returned items, select the **payment type** to return the remaining balance of the transaction to the customer.

To complete the exchange, click **Finish Sale**. There may be change due to the customer depending on the situation. Give the customer their receipt and items, and take the returned items.

4.6.4 To issue a refund without a transaction

- From the main menu, click **Sales > Refund.**
- To add the returned items to the refund, in the Items field, scan the items' **barcodes** or search for their **names**. Once added, the refund's Total on the right will calculate automatically and will be negative, indicating it is due to your customer.
- Click **Payment** and click **Max** or enter an amount for the appropriate payment types.
- When the remaining Balance is 0, complete the refund by clicking **Finish Sale.**

4.7 Printing Receipt

Receipt from lightspeed retail can be printed through the iPad POS when a receipt printer is connected to it. Receipts can be printed after every transaction is completed.

Receipts for historical transactions can also be printed using the sales history feature explained in the section below

For printing out (A4 / A5) sized receipts please use the connect a printer to a laptop or a PC, and use browser based Lightspeed interface to print receipts. The paper size and margins can be customized in the printing settings of the browser.

4.8 Sales History

The Sales History screen lets you view all sales and refunds that are completed or in progress. The Sales History screen can be filtered by shop and provides the following sale details:
- Sale ID
- Date and time
- Customer
- Total
- Status

Depending on if the sale status is Completed or In progress, the Sales History screen also provides additional features such as receipt options, refunding a sale and reopening an incomplete sale or refund.

Completed sale:

- Print Receipt
- Print Gift Receipt
- Print Full-Page Receipt (via AirPrint)
- Print Full-Page Gift Receipt (via AirPrint)
- Email Receipt
- Refund

**In progress sale:**

- Reopen

4.8.1 Using the Sales History screen features

- From the main menu, tap **Sales History.**

- Locate the sale by:
    - swiping **down** to manually search for the sale,
    - searching the **Sale ID**,
    - searching the **customer's first/last name**,
    - scanning a **receipt barcode**, or
    - filtering by **shop**.

- Tap the sale to open it and choose one of the following options:

○　　**Refund**: Available for **Completed** sales only. This option starts the refund or exchange process for the corresponding sale.
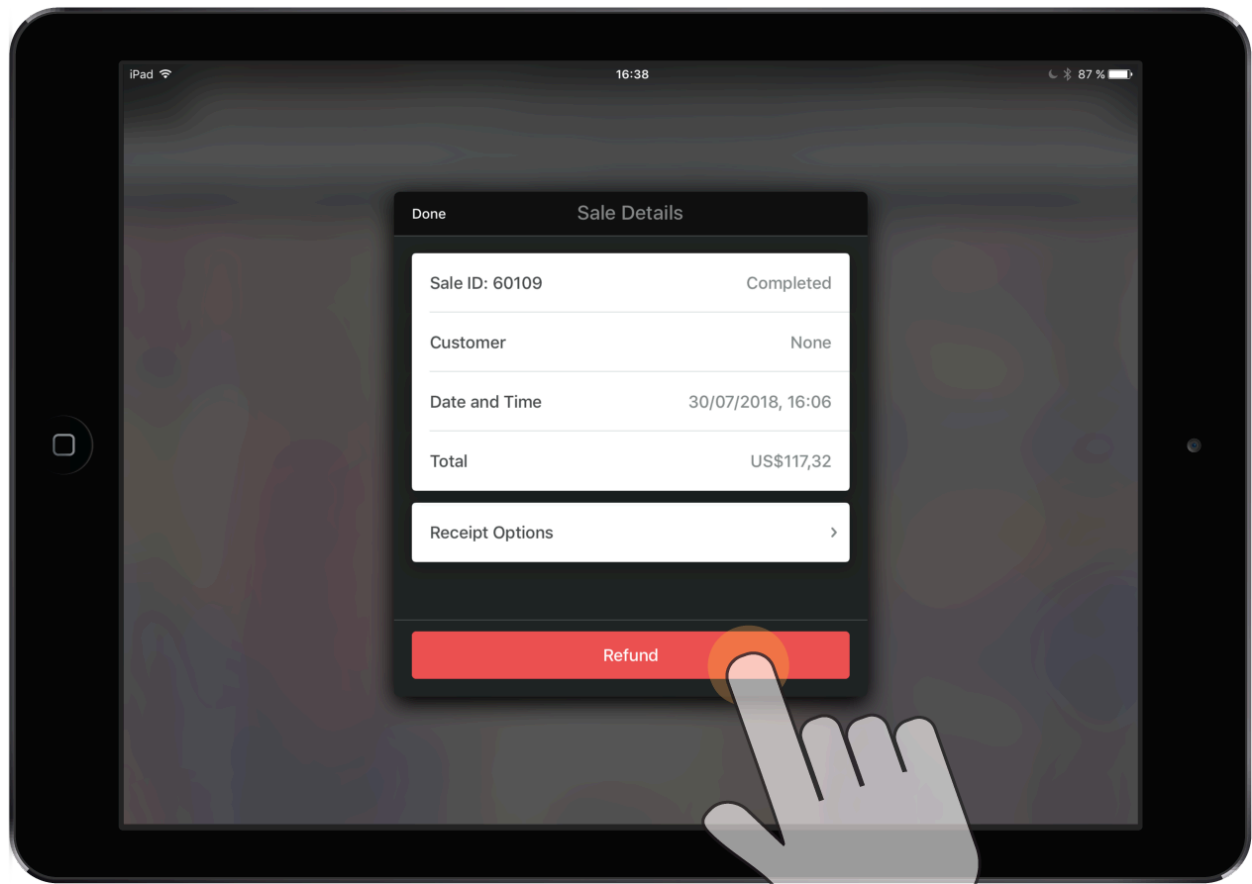

○　**Receipt Options**: Available for *Completed* sales only. These options let you:
- ■　print the sale and gift receipt to your receipt printer,
- ■　print the full-page sale and gift receipt via AirPrint, or
- ■　email the sale receipt to your customer.
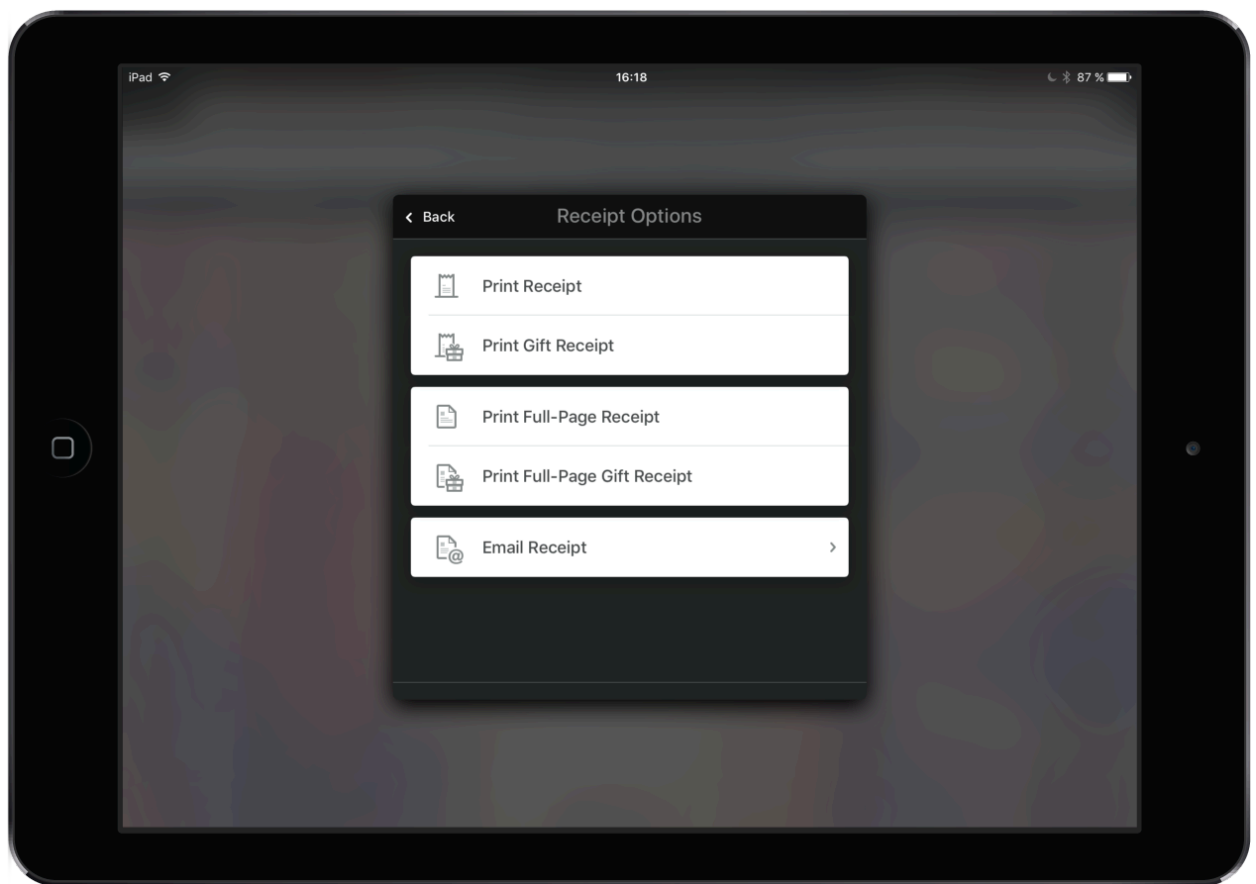
○ **Reopen**: Available for *In Progress* sale and refund transactions only. This option brings you to the register to continue the incomplete sale or refund.
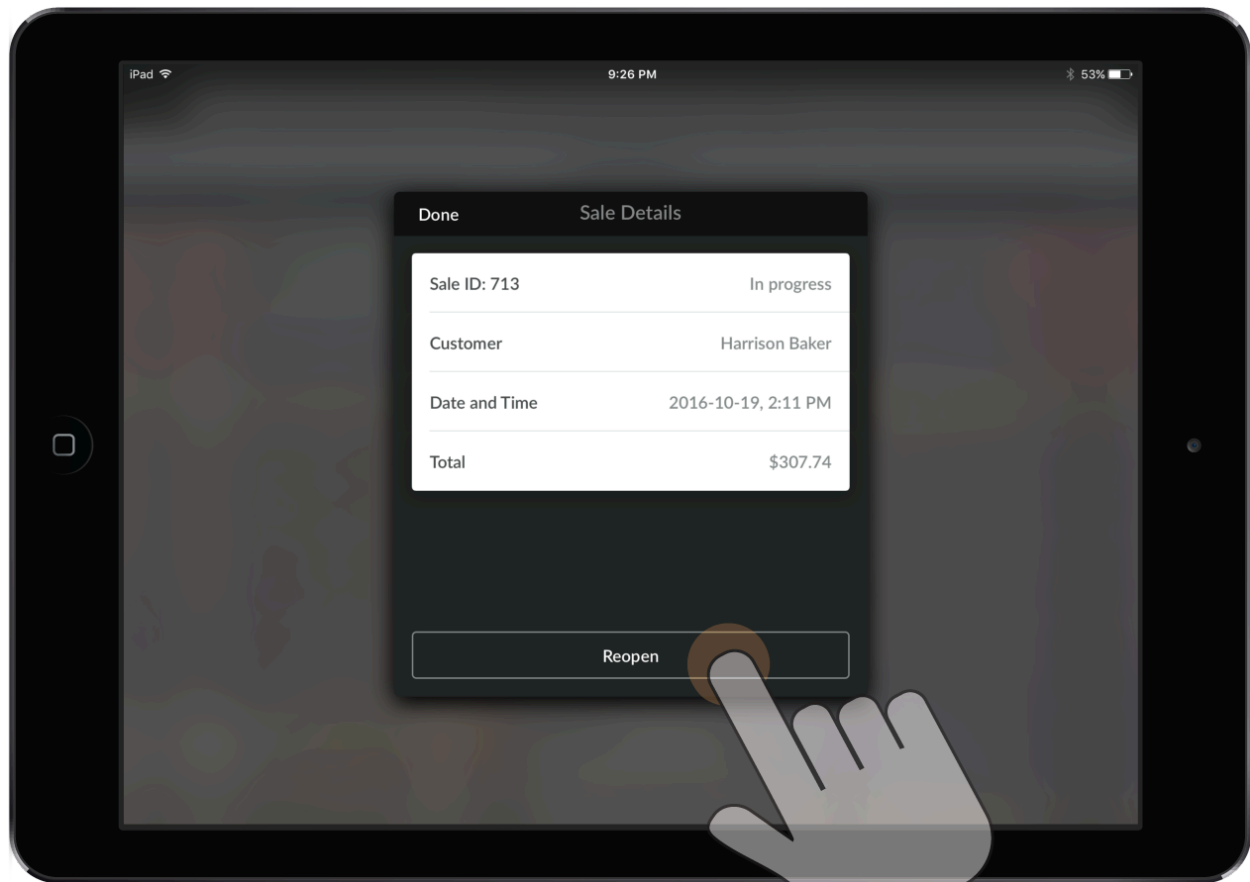
4.9 Recommendations

● It is a good practice to record customer details (email-id or phone number) for every sale transaction.
● Lookout for warnings from Lightspeed displayed while processing the sale.
● It's important that you add customers to sales so that they receive any discounts they're entitled to.

5. Work orders

5.1 Creating a job order/work order

You can use work orders to easily schedule services, repairs and other tasks to employees.

- From the main menu, click **Service** > **New Work Order**.
- Enter your customer's details, if they are a new customer click the **Create New Customer.**
- Enter the description, color, size, and serial fields information.
- In the **Date In** and **Due** fields, select dates and times.
- Enter any additional comments in the **Notes** field.
- Add the inventory item, labor charge, or miscellaneous charge.
- To print a tag, quote or email, click on the respective buttons available at the top of the work order
- To checkout the work order, click the **Checkout** button and complete the work order.

5.2 Completing Work Order

To close you can view open and waiting work orders by date and status from Schedules tab.

- From the main menu, click **Service** > **Work Orders**
- Locate the work order and click its **ID** to open it.
- From the **Status** drop-down, select appropriate status.In case the the work order is completed, select **Finished**
- If needed, add, remove or update the items or charges on the work order.
- Click the **Checkout** button to go to the payment screen.
- Click the **Payment** button
- Click the **Max** button or manually enter the **amount** next to the corresponding payment types.
- Click the green **Finish Sale** button.

5.3 Recommendations
- You can create custom work order statuses to best represent the workflow of your service department.
- Work order status should be updated regularly.

6: Customer

In Lightspeed Retail, you can add a customer from:
The Front- End (Refer section - New Sale)
The Sale (Retail Manager)
The Customers (Retail Manager)

6.1 Adding a customer from the register

- From the main menu, click **Retail Manager** >**Sales** > **New Sale**.
- To the right of the Search Customers field, click **+ New**.
- Enter customer details.
- Click **Save Changes**.
- Note : To return to the current sale immediately, you can simply click **Attach To Sale** instead.
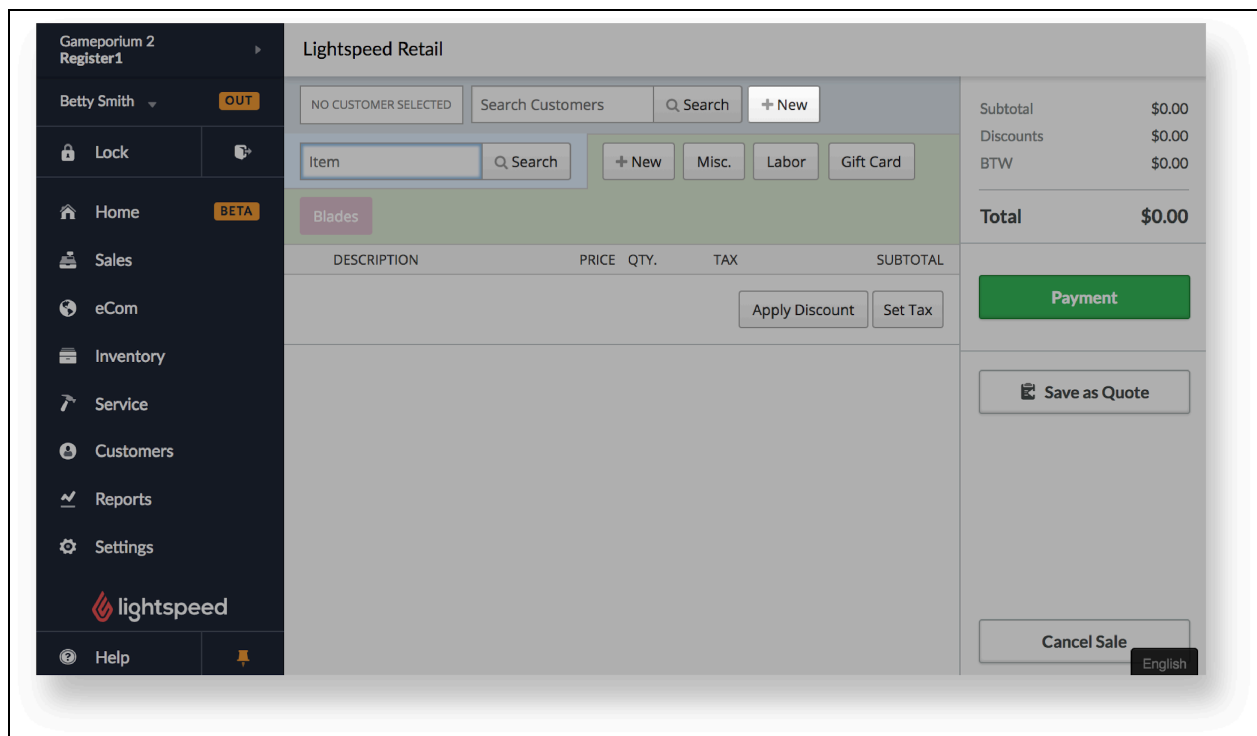
- To return to the current sale, click Checkout.

6.2 Adding a customer from the Customers section

- From the main menu, click **Retail Manager** > **Customers** > **Customers**.
- 2) From the top-right, click **+ New Customer**.
- Enter your customer's details
- Click **Save Changes**.
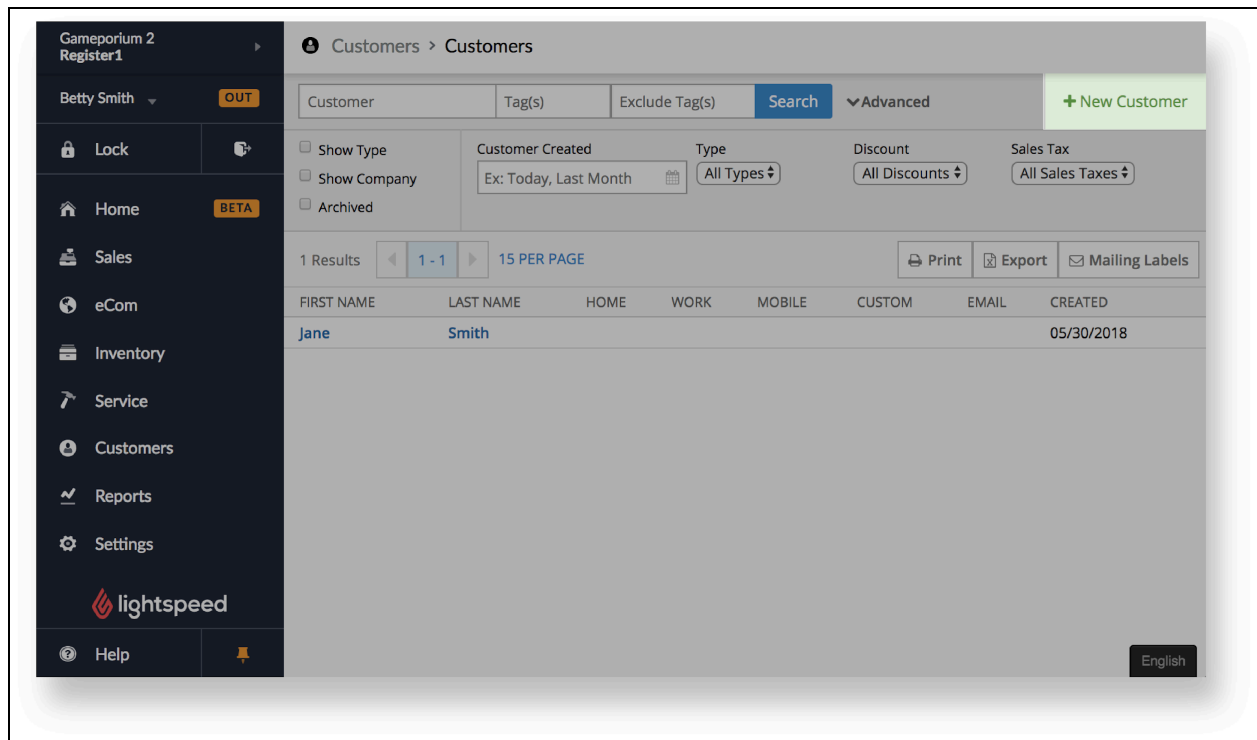
Recommendations

- Every customer created should have a unique identification either by using their email-id or phone number.

7.1 Inventory Count

Use inventory counts to reconcile inventory, determine shrinkage and correct your inventory counts. You can do either full or partial counts.

**Please note that Special orders, layaways and work orders Items set aside, such as special orders are not included in inventory counts. You count only the items you have in stock and ready to sell.

7.2 Creating a count

- From the main menu, click **Retail Manager** > **Inventory** > **Inventory Counts** > **+New** Inventory Count.
- Name your count. It's a good practice to name count as "Shop-FromDate-ToDate". For example - Outlet1-July1-July72019
- If you have a multi-store account, you will need to select the shop where the count will be performed.
- NOTE: Once you add items to your inventory count, you can no longer change the shop you selected.
- Click **Save Changes.**

7. 3 Perform your count

To count with a scanner
- Make sure your cursor is blinking in the Item Scan/Search field, on the right side.
- Scan each item you want to count. To count an item twice, scan it twice. Enter a number from 1 - 99 after you scan an item to set the item's count. For example, scan an item, type 80 and press Enter on your keyboard. If you're unable to scan an item, do an item search and add the item from the list.

To count using printouts,
- On the left menu of the **INVENTORY COUNT** page, select **Print Item List**.
- To print a list of items to count, select a **Sort By** option and a list of the items is displayed. Using the printout, mark the quantity of each item in the Count box. When you're done the counting, return to the computer and select Print Item List. Enter the ID from the printout, pressing Tab to move from field to field.

Spot Count
- On the left menu of the **INVENTORY COUNT** page, click **Missed**. This list displays the uncounted inventory items.

7.3 Reconciling a Count

Reconciling is when you change your inventory records to match your physical count. Be careful when performing this function as it adjusts your inventory records for all counted items.

- On the **INVENTORY COUNT** page, on the left menu click **Reconcile**.
- When you're certain that your counts are correct, click the **Reconcile Inventory** button.
- After reconciling, on the left menu click **Shrinkage** to view how much inventory was lost due to shrinkage.
- NOTE: Inventory counts measure discrepancies in inventory levels. Sales or added inventory do not change your shortages. For example, if you find that you are short 2 hats, your adjustment will be -2 to quantity on hand for the hat. That doesn't change as you sell items or receive purchase orders. The quantity on hand is still off by -2.

Recommendations

- It is always a good practice to export asset report, before start Inventory count. Report will help you identify items in your inventory that does not have default cost or default price attached to it.
- Inventory counting must be done when there are no sale/purchases transactions happening.
- Reconciliation must be completed for the count to take effect.
- Ensure you review the Shrinkage Report once the count is reconciled
- After you complete your count, if any items are highlighted in yellow with a QOH Changed button, it signals that the inventory has changed after you entered the count for the item. This can be any sort of change, such as a new sale, purchase order, transfer or manual adjustment, so investigate what the reason is if you're not sure why the quantity on hand changed.
- We recommend that you name the count based on the situation and time of year, for example, Fall 2019 Count.

8. Credit Accounts

Credit accounts are a great way to extend credit limits to your customers, allowing them to pay for sales with their credit account and letting you refund sales in the form of store credit.
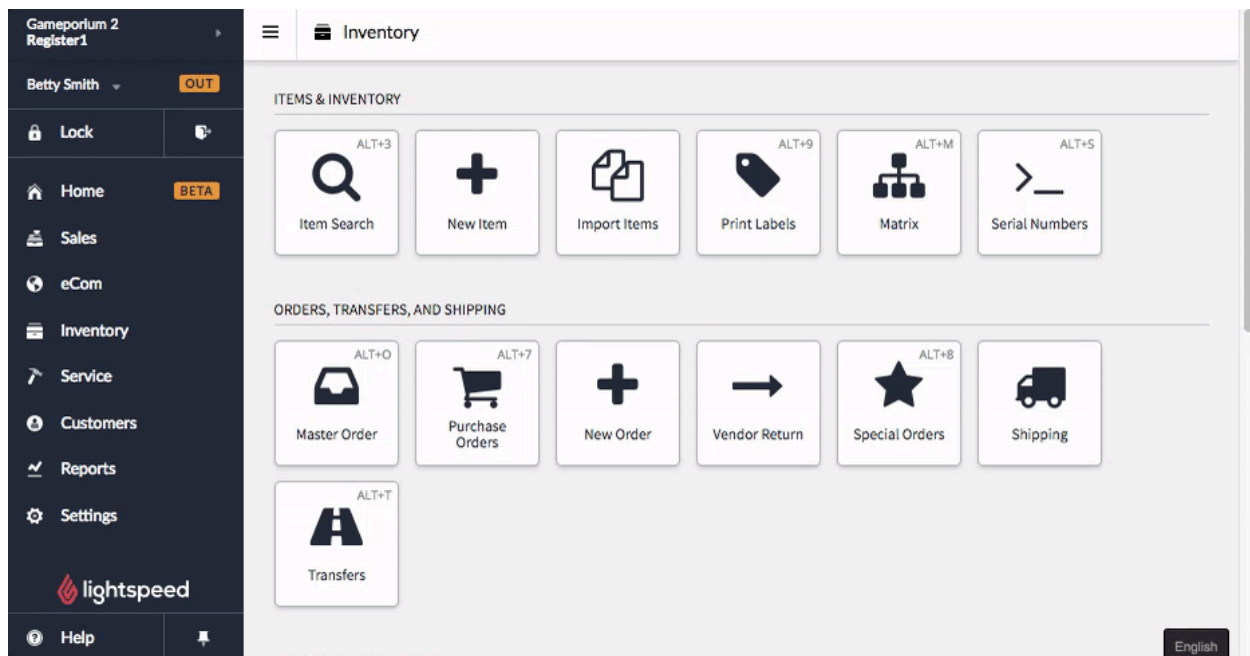
8.1 Adding a deposit to a credit account

- Deposits can be used to add funds to a credit account that you haven't extended a credit limit to and to pay for items on layaway or special order in advance (whether partially or in full).
- Adding a deposit to a credit account begins with attaching your customer to a sale. You can attach your customer to a sale by either entering their searchable details or using search filters.

To attach your customer using search filters:

- From the main menu, click Sales > New Sale.
- To the right of the Search Customers field, click Search.
- Use the available filters to narrow your search results.
- Click the Attach To Sale button next to your customer.

Now that you've attached your customer to the sale, you're ready to add the deposit:

- On the right-hand side of the register, click Payment button.
- Under your customer's name, click the Add Deposit button.
- In the new window, enter a Deposit Amount and click Add.
- From the PAYMENT section, select a payment type.
- Once the payment is accepted, click Finish Sale.
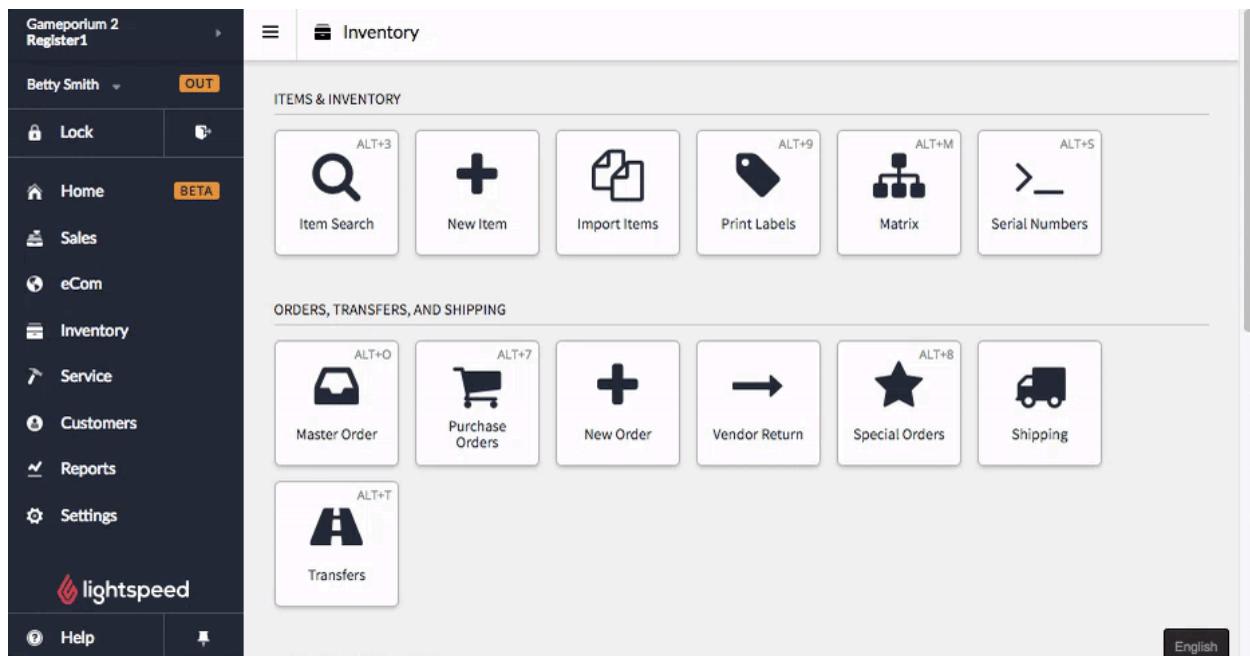
8.2 Refunding a deposit from a credit account

Refunding a deposit from a credit account begins with attaching your customer to a sale. You can attach your customer to a sale by either entering their searchable details or using search filters.

To attach your customer using search filters:

- From the main menu, click Sales > New Sale.
- To the right of the Search Customers field, click Search.
- Use the available filters to narrow your search results.
- Click the Attach To Sale button next to your customer.

Now that you've attached your customer to the sale, you're ready to refund the deposit:

- On the right-hand side of the register, click the Payment button.
- Under your customer's name, click the Refund Deposit button.
- Enter a Deposit Refund Amount > select a Withdraw Type > Ok.
- Once the payment is accepted, click Finish Sale.

8.3 Making a payment towards a credit account

When a credit account with a credit limit is used to pay for a sale, your customer must make a payment towards their credit account for the balance due.

Making a payment towards a credit account begins with attaching your customer to a sale. You can attach your customer to a sale by either entering their searchable details or using search filters.

To attach your customer using their searchable details:

- From the main menu, click Sales > New Sale.
- In the Search Customers field, type your customer's searchable details.
- Click Search. Your customer will attach to the sale if your searchable details have a unique match.
- If the searchable details don't have a unique match, click the Attach To Sale button next to your customer.

To attach your customer using search filters:

- From the main menu, click Sales > New Sale.
- To the right of the Search Customers field, click Search.
- Use the available filters to narrow your search results.
- Click the Attach To Sale button next to your customer.

Now that you've attached your customer to the sale, you're ready to make a payment:

- On the right-hand side of the register, click the Payment button.
- Under your customer's name, click Make Payment > enter a Deposit Amount > Add.
- From the PAYMENT section, select a payment type.
- Once the payment is accepted, click Finish Sale.