Getting Started

Setups

Before using LightSpeed and its powerful features, there are several settings that must first be configured, including information about your Company, your region's taxes, and the users who will be using the software. These are found in the Tools menu, under the Setup option.

While LightSpeed has many more features than those listed here, these are the basic requirements for you to get started with the software. For details on these and other features, please see the *Setups* chapter in the LightSpeed manual.

1. Create your Company.
>Tools/Setup/Company

Company, Addresses and Contact Info, Fine Print Sections
To start, enter your Company name, along with your Billing and Shipping Addresses, Phone Numbers, Email Addresses, and Web Site Addresses in the available fields. The Fine Print section allows you to enter the fine print that prints at the bottom of Quotes, SRO's and Invoices.

Logo
LightSpeed can store a 192 x 192 pixel JPEG logo for your Company. Drag a JPEG file to the Logo section, and the image will be scaled and saved to the database. This logo will show up on all your printed sales documents. To remove the logo, click the 'X' button.

Master Password
All LightSpeed databases come with a default password set internally that Xsilva can use in the instance that you require backend database support. You can change your Master Password from the default for maximum security and use the 'Reset to Default' button to reset it back to the default password when backend database support is required. Store this password in a secure place, as it is absolutely irretrievable once forgotten.

2. Set up your User Privileges.
>Tools/Setup/Privileges

The Privileges Setup panel allows an Administrator to determine which groups of Users can access which privileges in LightSpeed. Click a Privilege Group to display the associated privileges. By default, LightSpeed has three Privilege Groups: 'Administrator', 'Manager' and 'Salesperson'. These can be modified so that their Privilege set suits the business's requirements and can be duplicated to create variations on their Privilege set.
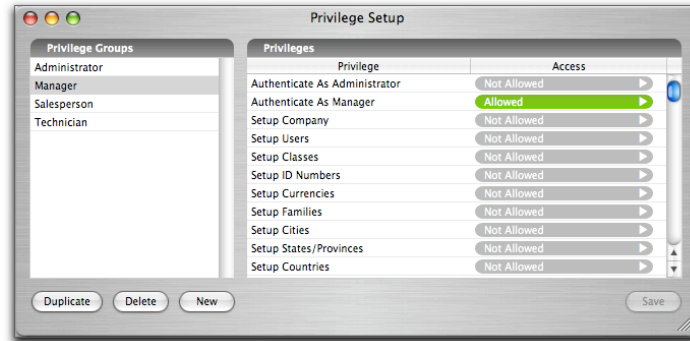
Click on an Access setting to select a new Access setting from a popup menu. Each Privilege within a Privilege Group can have one of five Access settings:

Allowed: User has access to this Privilege
Not Allowed: User does not have access to this Privilege
User Authentication: User must confirm their Username and Password to access this Privilege
Mgr/Admin Authentication: User must have a Manager or Administrator enter their Username and Password to grant access to this Privilege
Admin Authentication: User must have an Administrator enter their Username and Password to grant access to this Privilege

3. Create your Users.
>Tools/Setup/Users

Administrators should enter all Users that need access to the system in the Users Setup panel. When creating a new User, you can enter their First Name, Last Name and Phone Number, and the Login Username and Password that they will log in with. The Login Username and Password are case-sensitive.

The Userlevel popup menu allows you to set which Privilege Group each User belongs to and the Current checkbox allows you to determine whether the User is currently allowed to log in.

Editing or deleting Users will not remove them from any sales documents that they have been associated with.

4. Set the ID Number Sequence for Sales Documents.
>Tools/Setup/ID Numbers

Administrators can set the starting ID numbers for Quotes, SRO's, Orders, Invoices, POs and Timesheets by selecting the type and entering the 'Next ID' number. You cannot set the 'Next ID' number to lower than the 'Last ID' number used.

5. Set up your Currencies.
 >Tools/Setup/Currencies

LightSpeed can handle multiple Currencies, which are set up in the Currency Setup panel. The primary Currency used in your business must be set as the Default Currency with a Currency rate of '1' and the Currency Rates of all other Currency Rates must be set correctly in reference to the Default Currency.

6. Set up your Taxes.
>Tools/Setup/Taxes

The Taxes Section of the Taxes Setup panel is where an Administrator will enter the names of up to five taxes and set their GL Accounts.

Tax Codes specify which taxes and which rates are charged in a particular jurisdiction or circumstance. The default Tax Code is the Tax Code that is used when creating a new sales document, and is set in the Station Setup window. You can create additional Tax Codes for charging out-of-state taxes. An unlimited number of Tax Codes can be created.

Example: Your store is located in Chicago. You collect a state tax of 7.5%. You would create a tax called "STATE" in the top left box of the Tax Setup window. Click Save. In the Tax Codes section, click New, name the Tax Code (IL, for example), and enter "7.5" in the box below the STATE tax. Click Save.

An Administrator can set up special *Tax Statuses* where particular taxes are exempt. If a Customer is entitled to certain tax exemptions, or a Product is exempt from certain taxes, one can apply the corresponding Tax Status.

Taxes also have the ability to be configured according the local specifications. In the column marked (1), you can indicate a maximum dollar value for the tax collected. In (2), the checkbox indicates the tax is compounded on the sum of the subtotal plus the taxes. In (3), the checkbox indicates a tax that is Paid and must be assigned a GL Account for the export to the accounting package. Unless you are in a region where these special considerations apply, **do not use these options.**

At the bottom of the main Tax window, there is a checkbox that enables LightSpeed to calculate its taxes differently. The "System-Wide Tax Inclusive Selling Prices" is designed for regions with particular tax calculation involving a requirement for tax-in totals. It is recommended that unless you are in such a region, **you do not use this option.**

7. Define your Cities, States/Provinces, and Countries.
>Tools/Setup/City (State/Province, Country)

Pre-defined lists of commonly-used Cities, States/Provinces and Countries can be set up by an Administrator in these Setup panels. Select arrows on the City, State/Province, and Country fields of the Customer window allow Users to select an item from these pre-defined lists. You can add to these lists by clicking "New", entering the name, and clicking Save. You can also choose the default city by clicking the checkbox.

Non-Administrator Users can add to the lists by clicking the "+" icon on the Select window in sales documents. A new Customer box will come up and if the city is not in the list, the "+" icon can be clicked in the drop down menu to add it.
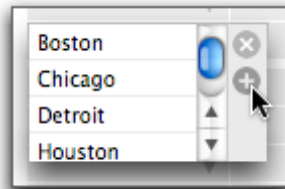

8. Define your Payment Methods.
>Tools/Setup/Payment Mathods

LightSpeed allows Administrators to set up fifteen Payment Methods that can be selected on the Invoice to record payments from Customers. Payment Methods can be assigned a Type that determines whether extra information is collected on the Payment screen. For example, a Credit Card Type displays a field where the User can enter the Authorization Number of the transaction. Specifying a Payment Method as Credit Card also sets it up to process internally through an authorized internal credit card processor.

9. Set up your credit card information.
>Tools/Setup/Credit Card Processing
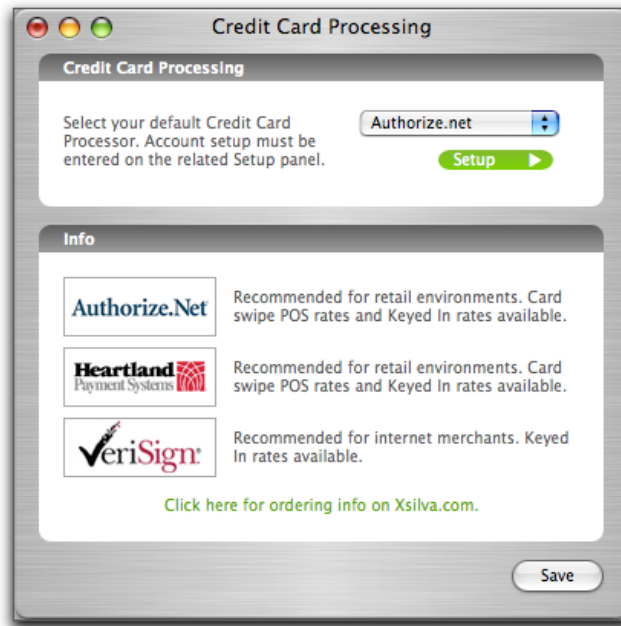
This step requires that you contact Xsilva Systems by telephone, at (514) 907-1801, or by email, at support@xsilva.com, for instruction on the completion of the Credit Card Processing Setup.

10. Import and Assign your GL Accounts.
>Tools/Setup/GL Accounts

Accounting packages like MYOB and Quickbooks assign a unique name or number to each of their General Ledger accounts. The Accounting Export from LightSpeed to these accounting software packages requires that you first import these GL Accounts into LightSpeed and map their unique names or numbers to corresponding items, such as Payment Methods, Taxes, and Products.

> **1**. Export your GL accounts from MYOB or Quickbooks.
> **2**. Open the GL Accounts setup in the LightSpeed Tools menu and import the file you exported using the corresponding button.
> **3**. Select GL accounts for Accounts Receivable and Accounts Payable in the Linking section.
>
> **Note**: In Quickbooks, you must choose between using account names or account numbers.

Below is a list of key data in LightSpeed that require a GL Account to be assigned for the Accounting Export, and where they can be found.

GL Accounts Setup	Accounts Receivable, Accounts Payable
Product Window, GL tab	Product Income, Product Inventory/Asset, Product Expense/COGS
Taxes Setup	each tax collected and (if applicable) paid
Payment Method Setup	each method of payment

11. Set up your Station.
>*Tools/Setup/Station*

The window for establishing the settings for the POS screen can be found in the File menu, under the menu item Station Setup. This is the window where an administrator will choose settings for a particular station's POS hardware, printing configuration, and various defaults for POS screen, including tax configuration, search settings, and customer type.
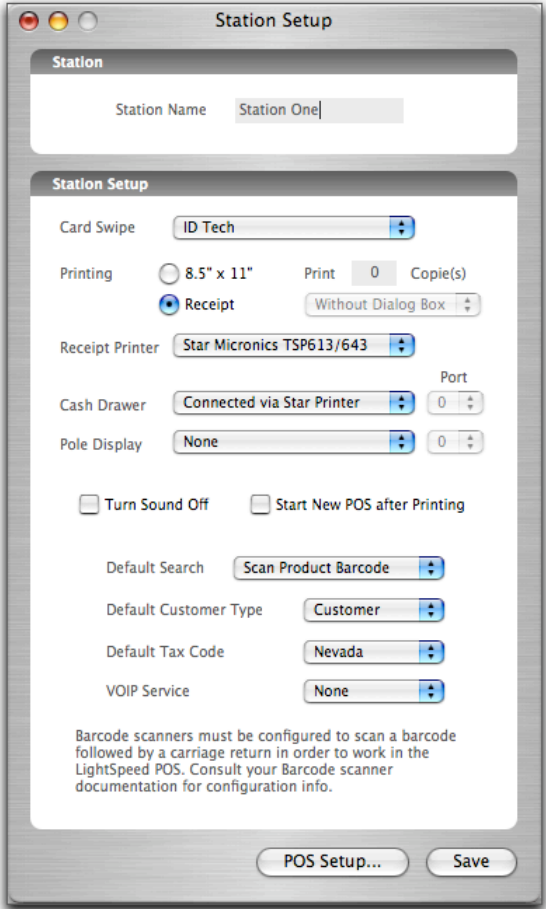
Station Name
This field allows you to set the name for this POS station. This name appears on receipts and can be reported on with LightSpeed's Reporting tools.

Card Swipe
The Card Swipe setting is a pull-down menu that allows you to choose the supported card swipe device for credit card transactions, either "ID Tech", "ID Tech Omni 3237", or "Magtek".

Printing
You have the choice to set your printing format to be standard, letter-sized paper, suitable for regular laser printers, or to a receipt printer. Formatting will automatically be adjusted for each size. **Note**: If the receipt printer is chosen, it will only be accessed when printing Invoices. All other documents – Quotes, SRO's, and Orders – will be printed on 8.5" x 11" format.

You may also choose to disable the print dialog box when printing. By entering a positive value in the Print Copies field, that number of invoices will be printed with or without a dialog box, depending on what is set. Again, this is only applicable to Invoices – a print dialog will appear for other documents. If the value is set to zero, a dialog box will appear for Invoices, as well.

Defaults
Receipt Printer – Choose your receipt printer here.

Cash Drawer - If you have a cash drawer, indicate how it's connected using the pop-up menu.

Pole Display – if you have a pole display, indicate it here.

Turn Sound Off – This checkbox disables the sounds associated with various functions in POS.

Start New POS after Printing - If you have a high volume of invoices, you may wish to have LightSpeed automatically create a new invoice when the last one has been printed. To do so, simply check this box.

Default Search – This pull-down menu allows you to set which of the four search criteria – UPC, Product Code, Description, or Document ID - to use as the default in the main POS window.

Default Customer Type – With this pull-down menu, you can choose the default for the Customer type – either walk-in or an existing Customer. If you do not wish to track information on your customers, choosing 'Walk In" will allow you to accelerate the speed with which you can perform a transaction.

Default Tax Code – This pull-down menu allows you to choose the default tax code from the list you have already set up in your Taxes Setup window. However, you can still choose another tax code for any particular Invoice regardless of this default setting.

VoIP Service – This pull-down menu allows you to choose which VoIP service you're

using, either webFones PBX or Skype.

From the Station Setup window, click the POS Setup button located at the bottom. This takes you to a window that allows you to add your logo to the POS screen, as well as configure other settings for POS features.

Logo
This window allows an administrator, or another user set up with the appropriate privileges, to insert a logo that will appear on the POS screen. To display a color version of your logo, insert a 230 x 80 dpi jpeg version of your logo on a black background.

The Basics

Adding Customers

There are 2 ways to add Customers to LightSpeed. The first is to click the Customer button in the toolbar and enter the Customer's information in each field, including their Customer category, their default language and currency, and which sales person is assigned to that account.

The other way is to use the Import Customers option of the LightSpeed Import Tools to import your tab-delimited text file. Once you choose your file using the Open File button, you simply have to drag and drop each field header in the second column to match your data in the first column. The triangles indicate a drop-down menu that allows you to specify further information about a particular field. Click Import – your Customer data will be imported into LightSpeed.

Creating Suppliers

Before entering your Products, it is advisable to set up your Supplier information. Structured similarly to the Customer window, the Supplier window is accessed through the Supplier icon in the toolbar. Enter the Supplier information, including their contact name, the Currency they bill you in, and whether or not this is your default Supplier. **Note** – this is not to be confused with the designation of a default Supplier for each Product, which is done in the Product window. Each Supplier you create will appear in the pulldown menu you access to add Suppliers to each Product, as well as being included in the list of Suppliers you export in the Accounting Export procedure.
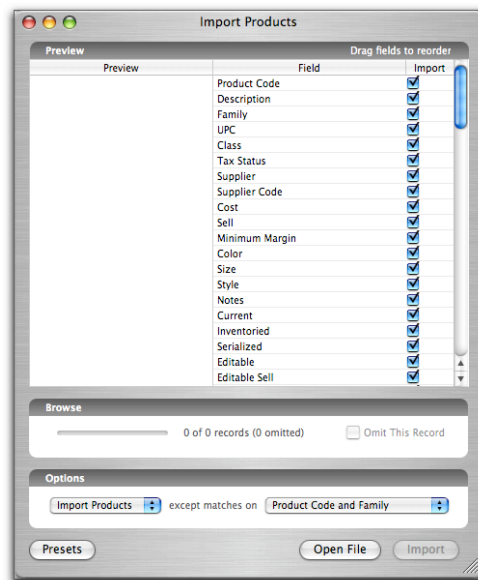
Adding Products

There are 2 ways to add Products to the LightSpeed database. The first is simply to click the "New Product" icon and enter the information manually, including the Product Code, the Description, its UPC code, at least one Supplier, the Cost, and the Selling Price. You can also put the Product into your Inventory using the Adjust button in the Inventory tab.

The other way is to import a list of Products from a tab-delimited text file using the LightSpeed Import Tools included with LightSpeed. One of the choices in the main menu of the Import Tools is Import Products. Click this button and a window will appear with a Preview pane in which you can match up fields and save your settings.

Setting Prices

When your Products are entered in the Products database, you may wish to set their selling prices to a fixed price or one calculated from either the default Cost or an alternate Cost associated with a particular Pricing Level. This can be done according to their Family, Class, or other category by batch rather than individually, in the interest of saving time. To do this, you can choose the Set Selling Prices option of the Tools menu. There, you will be able to select subsets of your Products using a series of filters that will allow changes to be applied to only those Products that meet your chosen criteria.
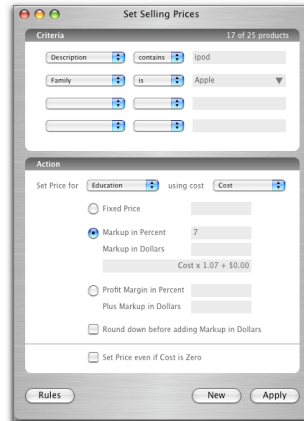
Once you have the subset you wish to change, you are able to decide if you want to simply set the Fixed Price, or to calculate a markup using a percentage or a dollar value, or a combination of the two.

In addition, you can also set the Sell Price for the Pricing levels you've created in the Pricing Level Setup option in the Tools menu, allowing you to customize pricing for different categories of your Customers. You may also specify which Cost on which to base this calculation; the standard Cost or a Cost particular to a certain Pricing Level. To do this, use the pull-down menu that allows you to "Set Price for" to select the Pricing Level, and using the adjacent pull-down menu, select the Cost you wish to use – the standard Cost for the Product, or one associated with a particular Pricing Level.

You may use the Rules button to save any of these criterion/action combinations for the creation of future Products.

Quoting

First, you assign a Customer name to the Quote. If you do not want to add the Customer to the database, you can specify them as a Walk-In, and then you may include as much or as little identifying information as you like. If the Customer already exists in the database, type a few letters of their name, or their telephone number in the search bar, or click All, and choose their name from the resulting list. If it is a new Customer, click the "+" icon, enter their information in the Customer window that appears, and click Save. When asked if you would like to reload the Customer information in the document, click OK.

To add Product to a Quote, you can either scan its UPC, type a few letters of its description or Product Code, or click All, and choose it from the resulting list. You are able to modify the Quantity, and, if the Product is set up to accommodate it, you are also able to modify the Sell Price. When you have completed the Quote, click Save. Once saved, you are able to then do one of two things to the Quote - create an Order using the Order button to request the Product be reserved or ordered on a PO, or, if some or all of the Products are in stock, create an Invoice using the Invoice button,

which will transfer ALL the Product on the Quote to an Invoice. You can then remove any Product the Customer won't be purchasing.

Ordering

Stock Order or Customer Order

To place a stock order, choosing the New Stock Order option from the File menu allows you to request Product for your Inventory. A new Order will appear with your company information populated as the Customer. To make a Customer Order, click the Order button in the task bar. A Customer Order looks identical to a Stock Order, except that you choose the Customer in the Customer section.

Next, enter the Product you want, taking note of the quantities in the Inventory status bar. You can cycle through these statuses by clicking the arrow icon. Click Save. If there is Product available for the Order, you may reserve it by clicking the arrow icon in the Order Inventory status bar, and choosing the appropriate option (see chapter on **Quotes, Orders, Invoices** for more details).

If you decide to create a PO solely from this Order, click the PO button and choose your Supplier from the Suppliers you have created. In the case that you would like to sort and aggregate your Orders in a given time period into PO's according to default Supplier, see *Purchasing* (below).

Product can also be ordered directly from sales documents (ie. Quotes, SRO's, and Invoices) using the Order button. On Quotes and SRO's, the Order button will transfer all Products to an Unsaved Order. On an Invoice, the Order button is used when there are Products being backordered, and only those Products with quantities in the Backorder column will be placed on an Unsaved Order when the Order button is used.

Purchasing

To view your Purchasing documents – Orders, PO's, and Supplier Invoices – click the Purchasing Browser icon located at the right side of the toolbar.

In the Requests tab of the Purchasing browser, you are able to view Product requests from Orders on a line-item basis, sorted by date created. Each line item will include a Product Status bar you can cycle through by clicking the arrow icon, as well as a pointer icon indicating the original Order. If Product is available, you can click this pointer icon and then reserve Product on the Order. When the Requests tab screen is refreshed, you will notice that Order has now dropped off the list of Requests for that Product.

In the Actions tab, Product requests are sorted by default Supplier. When your Purchaser goes through these requests, they can see what Products are in stock, and may choose to reserve them for those orders, or else create a new Purchase Order to bring those Products in.

To generate a PO, you can select individual Products, and click Generate PO, or you can select several Products (usually on the basis of the same Supplier, or simply several requests for the same Product) by using the Command key. Then, click Generate PO, and an unsaved Purchase Order will be created. To order a batch of Requests according to default Supplier, go to the Actions tab, and click Generate PO. Confirm your information, and then click Save – an ID number will be assigned. This is the PO number you can use with your Supplier. The Purchase Order is now Processed. You will notice an arrow icon at the far left of each Product – clicking it will reveal the various Orders for which this PO is ordering Product, as well as their corresponding Quotes (if applicable), and the Customers for each.
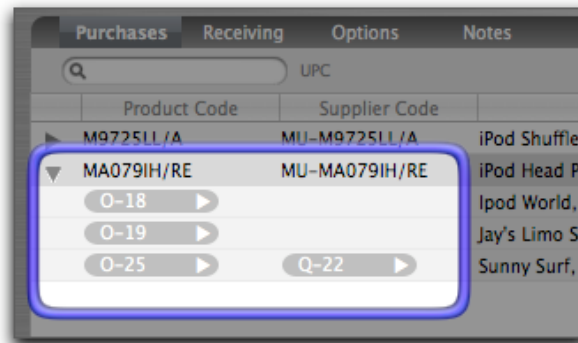
Note: If you delete an item from an unsaved PO, you will be asked if you want to cancel the original request, or re-submit it.

Tracking

To ensure that the Users are regularly informed of the status of their Orders and Requests, they should be sure to activate the various "My Orders" and "My POs" which apply to them in the Tracker Setup, accessible in the Tracker tab of the main Browser. This way, they will immediately be aware of Products ordered, received, and reserved for them, and can act accordingly.

In particular, the "My Orders with Received Backorders to Reserve" and "My Orders with Reserved Backorders to Invoice" are very useful and should appear in each sales representative's Tracker. To install a Tracker to the list that appears in the Tracker tab of the main Browser, simply drag and drop it from the left column to the right. For example, installing the "My Orders with Received Backorders to Reserve" will cause that User's Orders to appear in their Tracker when Product is received that should be reserved. Clicking the Alerted checkbox when this installed Tracker is selected will result in the Tracker appearing red.

At that point, the User can click the View Order icon on the line item to go to that Order and reserve the eligible Product. Once done, and the Order is saved, the Order will drop off the Tracker once the screen is refreshed.

In fact, Tracker may be used to configure a unique set of updates which allow each User to be kept aware of all sales documents, SRO's, and other data that are highlighted as an alert and which change regularly. Each Tracker item may be configured to set off an alarm when certain conditions are met, such as a Quote being created within the last 4 hours, which would be useful for a Manager. (see chapter on **Tracker**)

Receiving

Once the PO is processed, it is ready to have the Product marked as Received when it arrives from the Supplier. To receive Product, go to the original PO and enter what you have received of the total order. If a Product is serialized, it is necessary to click the Product line to scan or enter the serial number of the Product. If you do not receive the total quantity of a Product that was initially ordered, just enter the amount you did receive. Click Save.
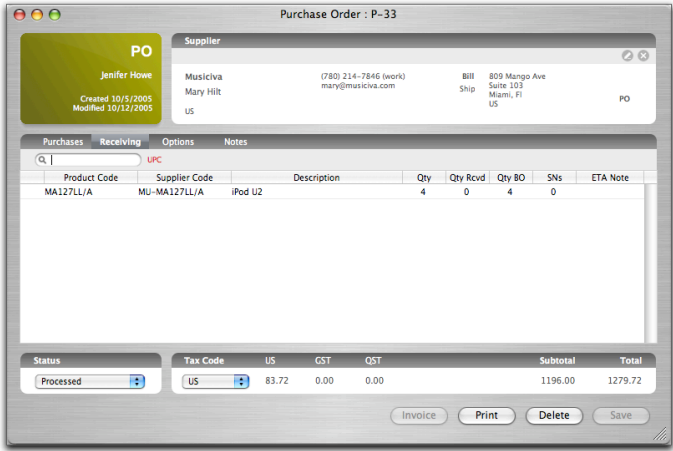

If the Product has a UPC code entered in its profile, a red U will appear next to it. If a UPC code is required, a green U will appear. Click the U and scan the UPC code – the profile will be updated.

If all the Product is received for a Purchase Order, its status will be set to Partially Received. If you receive more Product from the Supplier on a particular Purchase Order, go to the original Purchase Order and go to the Receiving tab. In the Qty Rcvd column, ADD the quantity you received that day to the quantity that had previously been received. For example, if you had ordered 10 x iPod Nano 2gb Black, and 2 had been received on Monday according to the procedure outlined above, there should be a quantity of 2 in the Qty Rcvd column. Then, when 4 more arrive on Wednesday, the number you will enter in the Qty Rcvd column will be 6. If the Product is serialized, you will have to enter the 4 serial numbers. Click Save. Then, the Invoice button should become available – click it to create an unsaved Supplier Invoice, and there will be a quantity of 4 of that Product on the Supplier Invoice. You may repeat this process until all Product is received on the PO, at which point the status will change to Received.

Note: Supplier Invoices are what you generate to track payables to your Suppliers. To create a Supplier Invoice for a particular PO, click the Invoice button – an unsaved Supplier Invoice will appear. Verify the information and click Save – this saves a file that will be used in your export to the accounting package you use. (See Accounting Imports)

When you receive the invoice from your Supplier for the PO, you should manually change the status to Invoice.

Reserving Product
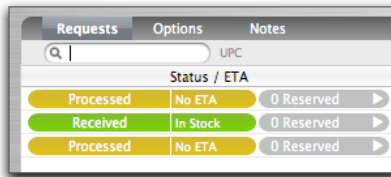
In an Order, each line item has a status bar and an action bar. The status bar indicates the status of the existing stock for that product – Available, Reserved, Coming For Customers, Coming For Stock. The action bar allows you to reserve, release, or cancel Product for that line item or the whole Order, as well as mark it as Invoiced. If the status bar is green, it is an indication that Product is available for this line item, and may be reserved with the action bar once the Order has been saved. The Product may then be marked, set aside, and await Invoicing.
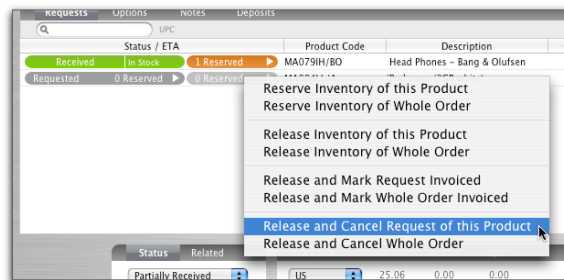
Invoicing - Backend

Invoices can be created 3 ways – from scratch, from a Quote, or from an Order. If you are creating an Invoice from scratch, simply click the Invoice icon (pictured left) and populate the Invoice yourself. Creating an invoice from a Quote or an Order will auto-populate the Customer and the Products, and any serialized Products must have serial numbers attached to them.

An Invoice is structured similarly to a Quote, and is assembled the same way, with the addition of a requirement for serial numbers of serialized Product. When a Product does require a serial number, a yellow warning sign will appear beside its Product Code. To enter the serial number, click the description once. The cursor will appear in the data entry field. Scan or enter the serial number, and it will call it up from the list of available serial numbers.

Once the Customer and Product information is complete, you are able to Save it, automatically proceeding to the Payment screen. Here, you can use the Payment Methods you've set up in the Tools menu to enter the Payments for the Invoice, including a combination of one or more methods. For credit cards, you can process the payment internally, using VeriSign, or by using your existing standalone credit card terminal and entering the authorization number into LightSpeed. For more information on Payments and Credits, please see the POS section of this manual.

Invoicing – POS

LightSpeed's POS feature is a front-end module for creating Invoices that allows multiple users to log in and out, tracking their transactions. It functions largely the same way the Invoice of LightSpeed's back end, but with a polished interface that takes full advantage of OS X's powerful graphics capabilities.

The screen is divided into 3 sections – the middle one is the POS sales register, the one to the left is the Customer detail area, and to the right is the Product detail area. The search bar located at the top of the sales register contains several icons that will give you access to Products, Customers, or other sales documents. The first step is to add a Customer. To select an exiting Customer, type a few letters from their name, or click All, and choose their name from the resulting list. If it is a new Customer, click the "+" icon at the bottom of the Customer detail area, enter the data, and then click Save. If you do not wish to add the Customer to your database, click Walk-In and enter as much data as you want.
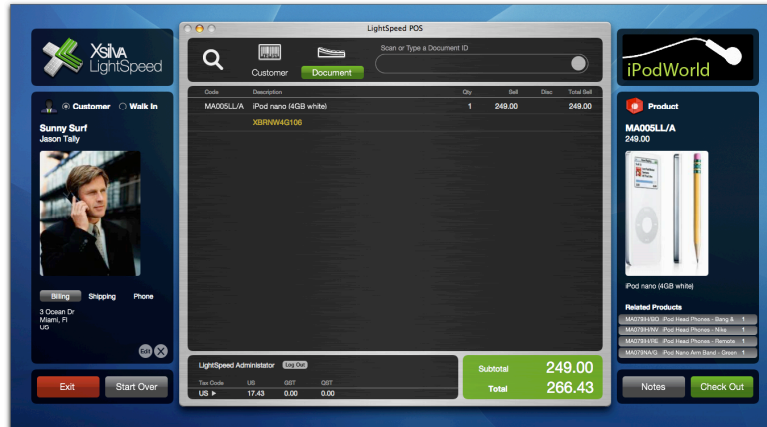
To scan a Product's UPC and enter it in your Invoice, click the UPC icon and scan – if it exists in the Product database, it will automatically be added to your Invoice. If it is serialized, click the Product line item once, and scan/enter the serial number. It should appear in a list, which is the available serial numbers for that Product, but if it does not, you may still attach it to the Invoice for later reconciliation.

Once the Invoice has all the correct Product and Customer information, you may click the Check Out button to save the Invoice and proceed to the Payments screen. There, you will see buttons corresponding with each Method of Payment you have set up, and may use them in combination with one another. Each payment must be saved. You are also able to use Credits from previous Invoices using the Apply Credit button (if applicable) by choosing which Credit to apply, and specifying the amount to be used.

To leave the POS layout, click the Exit button in the Customer detail area of main screen.

Doing a Return

In a Saved Invoice, there will be a Return button that can be used to create a Return Invoice using the Products on the original Invoice. Once you have created this Return Invoice, you can remove any items you're not returning from the Sales Register. Any serialized items sold on the original Invoice must again have their serial number entered in the Return Invoice. Payments on Return Invoices work the same way they do on standard Invoices, but with negative amounts indicating a return of the Customer's money.

Doing an SRO

There are 4 steps in the processing of an average SRO. As the status of the SRO progresses, you are able to reflect this by a pull-down status menu at the bottom of the SRO screen.
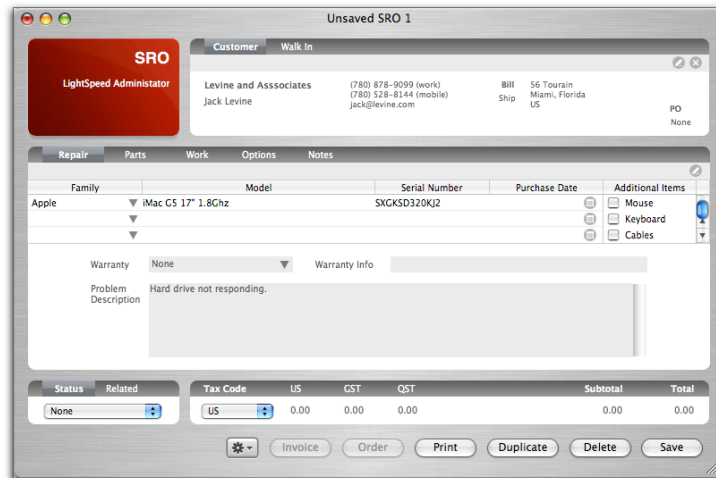
Having completed the Customer information, you must book the equipment in, and you may include information such as serial numbers and original purchase date. One of LightSpeed's features allows you to access Apple's GSX website to confirm a serial number's warranty status – simply enter the serial number in the appropriate column and hit Enter. If the warranty is valid, a photo of the model will appear along with that unit's warranty details, which will populate in the SRO by clicking OK.

Once the equipment is looked at, any parts that are required may be ordered as Products may be ordered from an Invoice, Quote, or Order. When an Order is created from an SRO, and that Order is then turned into a PO, the PO will have a special GSX tab that includes the Customer's information. When the parts come in, they will be received and allocated to the SRO as with a regular Order.

All work performed on an SRO is logged in the Work tab, and entered as a Product. In most cases, you would create a Product for each of your technicians and the Selling Price would be their hourly rate. When you are ready to bill the SRO, including its labor and parts, you click the Invoice button and an unsaved Invoice will be created.

In most cases, you will print both an SRO, which lists the parts and labor involved with the repair, and an Invoice, which bills for the parts and labor.

Balancing the Till

At the end of every night, you will need to reconcile the day's transactions with LightSpeed. For a summary of transactions, go to the Print User Reports option of the File menu, and choose End of Day. A window will appear which allows you to choose the date for which to view the summary, and an option to see the totals for all stations or just for one particular station. Clicking OK will give you an overview of totals for the day you've chosen. To see details, click the Print button, and the full summary of the day will appear, ready for printing. This detailed summary includes the totals for each

method of payment, totals for Invoices and Returns, and the ID number range for saved Invoices.

Jobs and Timesheets

Timesheets are a way to track the time each User spend at work, and specifically the time they spend on specific Jobs and Tasks within each Job. Jobs can be as short-term as the setup of a store demo, or as long-term as the installation of an entire network. To use Timesheets as a general record of time worked, each User can begin their daily Timesheet using the Timesheet icon in the Task Bar. Once they choose their name from the drop-down menu, an inactive Timesheet will appear, and the General default will appear under both the Job Code and Task columns. Click Start in the status column will begin the Timesheet, and clicking Stop will stop it.

Timesheets can also be used to track the completion of specific Jobs. To create a new Job, click the Job icon in the Task Bar. Name the Job using the Code field, and you can also provide a description of the Job. If the Job needs to be broken down further, you can create Tasks using the "+" icon. Users are then able to track their time for this specific Job, as well as the Tasks within that Job, when they create a new Timesheet.

During the course of a day, it is possible that a User will complete one Job and begin another. To do this, all they need to do is create a new entry on their Timesheet using the New button. Another line will appear as the first entry continues to count time. Clicking Start terminates the first entry and begins the new one simultaneously.

If the User needs to run 2 Timesheets concurrently, they must click the Timesheet icon a second time, rather than simply using the New button within an existing Timesheet.

Taking Inventory

There are currently 3 ways of adding your existing inventory into LightSpeed. First, by doing individual Inventory Adjustments for each Product. This would be the most time-consuming method but allows you to enter specific notes for each Product for later reference.

Second, you can import the information using the LightSpeed Import Tools. Choose Import Products and match fields by dragging the field names in the right column to correspond with the data in your tab-delimited file. While this method is faster, be advised that you will still have to go to each serialized Product, specify it as a serialized Product with the Serial Numbers checkbox, and enter the serial numbers. To do this, click Adjust, and then New, and you must add as many serial numbers as is reflected in your Quantity.

The last method is probably the easiest, and most reliable. First, divide your store into sections, and create a new PO for each. By 'receiving' each section into your Inventory using a PO, you then have an easily accessible record of your Inventory count, the location of each Product, and a simple way of recording the serialized Products.