

# Setup

## Introduction

The Setup menu, found in the Tools menu, features over two dozen Setup panels that allow an Administrator to configure and customize a LightSpeed installation to meet the needs of almost any small business.

By default, you must be logged in as a User with Administrator privileges to access the Setup panels. You can use the Privileges and Users Setup panels to enable other groups of Users to access some or all of the Setup panels as well.

### *Working with Setup Panels*

Most of the Setup panels display a list of items that have been created for that Setup category and allow the creation of new items by clicking the New button, the editing of existing items by double-clicking an item or selecting an item and clicking the Edit button, and the deletion of items by selecting an item and clicking the Delete button.

Example: The City Setup panel lets you add, edit or delete from the list of cities that appears when clicking the Select arrow on the City fields of the Customer window.



Other Setup panels, like the Company Setup panel, display fields and options which can be set and saved by clicking the Save button.

**Warning:** Setup panels modify LightSpeed's configuration for all Users. Configuration changes will generally not take effect until Users re-login. It is recommended that all Users log out and log back in after major configuration changes.

## Company

The Company Setup panel is where an Administrator can set up the basic Company information that is saved and printed on sales documents like Quotes, SROs, Orders, Invoices, and POs.

### *Company, Addresses and Contact Info, Fine Print Sections*

Enter the name of the Company, along with its Billing and Shipping Addresses, Phone Numbers, Email Addresses, 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, SROs 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 photo will be scaled and saved to the database. To remove the logo, click the 'X' button.

### *Preferences*

The 'Hide SRO Module' checkbox allows an Administrator to hide the SRO button in the toolbar and remove the SRO Tab from the Browser if the Company will not use the Service Repair Order feature.

The 'UPC Mode by default on POS Invoice' checkbox allows an Administrator to activate UPC Mode by default when a new POS Invoice is created, so that Products can be immediately scanned by a barcode scanner as soon as the window open

without the User having to click the UPC icon.

The 'Quote Valid For' field allows an Administrator to determine the default valid period printed on Quotes, like '7 days' or '1 month' depending on Company policy. The period can still be changed on the Quote.

#### *Change 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.

Warning: Be sure to protect and record your Master Password, as it cannot be reset or recovered by Xsilva if lost or forgotten.

#### **Users**

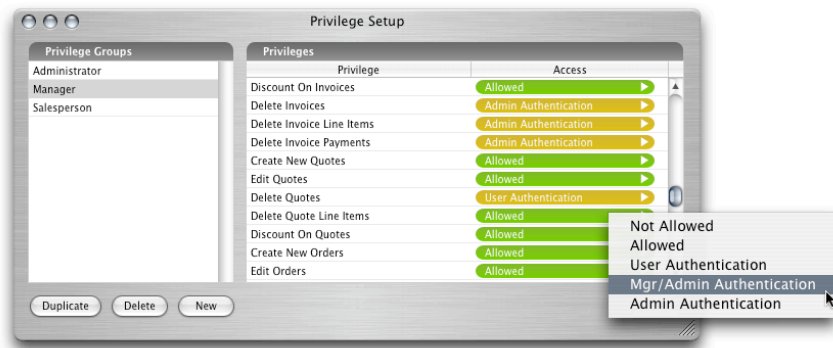
Administrators should enter all Users that need access to the system in the Users Setup panel. When creating a new User, you can enter their First Name, Last Name and Phone Number, and the Login Username and Password that they will log in with. The Login Username and Password are case-sensitive.

The Userlevel popup menu allows one to set which Privilege Group this User belongs to and the Current checkbox allows one 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.

## Privileges

The Privileges Setup panel allows an Administrator to determine which privileges in LightSpeed can be accessed by which Users. 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 or can 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

## ID Numbers

Administrators can set the starting ID numbers for Quotes, SROs, 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.

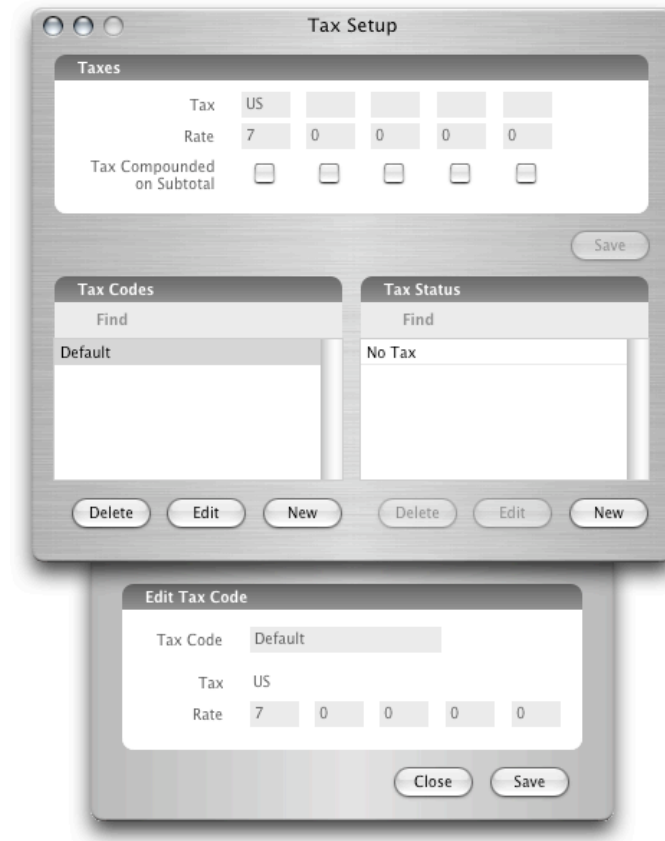
## Currencies

LightSpeed can handle multiple Currencies, which are set up in the Currency Setup panel.

Important: 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.

**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 default rates.



The 'Tax Compounded on Subtotal' checkbox should be checked only when the tax is calculated on the subtotal of all Products and other taxes combined. An example of this is the QST in the Canadian province of Quebec, which is calculated on the total of the Products and the GST.

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 selected by default when creating a new sales document. You can create additional Tax Codes for charging out-of-state taxes.

Example: A Customer whose purchases are always shipped to another state

where a particular tax must be charged might have their Tax Code set to the Tax Code that will be applied.

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

Example: If Customers who are registered businesses do not pay a certain state tax, a Tax Status can be set up and applied to automate this exemption for those Customers.

### **Custom Fields**

Custom Fields are an easy way to extend your LightSpeed database. You can turn on and name up to five Custom Fields for Customers, Customer Contacts, Products and sales documents (the Quote/SRO/Order/Invoice workflow).

Custom Fields can be set up as regular text fields or as date field, which display a popup calendar from which you can select a date. Select the 'Printed' option if you want the Custom Fields printed on sales documents.

### **Field Translations**

LightSpeed can print Quotes, Orders, SROs, Invoices and POs in English, French and Spanish. The Field Translations Setup panel lets an Administrator edit or change the translations for the standard fields printed on these sales documents.

If a Customer has a language preference for the sales documents they receive, select the language preference from the Language popup menu on the Customer window.

### **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.

Non-Administrator Users can also add to the lists by clicking the Plus icon on the Select window. A dialog box displays that allows one to add a new item on the fly.

### **Classes**

Administrators can create the Classes for their Products in this Setup panel. The Class is generally a category or sub-business that the Product belongs to. Setting Classes for Products is primarily for the purpose of reporting on your sales and inventory in the Reporting or Intelligence tools.

Example: If you are a computer shop, you may want to set up Classes like 'Hardware', 'Software' and 'Service Labour'. When you run a report you may restrict the report by Class to see the results for only one of your Classes so that you can compare the results with that of another Class to compare their performance.

**Families**

Administrators can create the Families for their Products in this Setup panel. The Family is generally the brand or manufacturer of the Product. Having the correct Families entered for Products will help you when reporting on your sales and inventory in the Reporting or Intelligence tools.

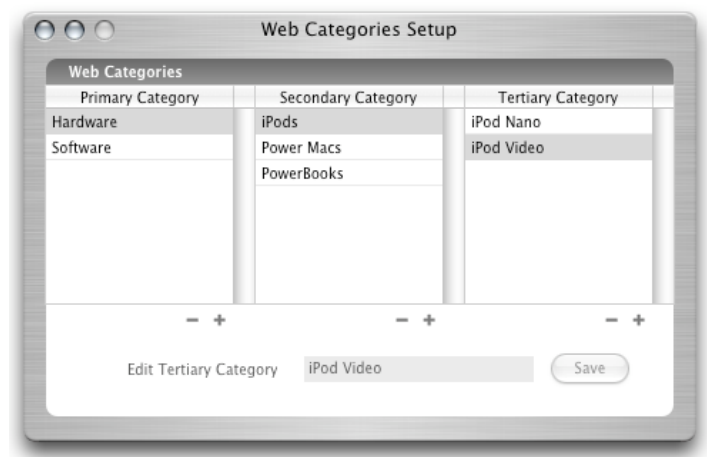
Example: The Family for the iPod Nano (2GB White) would be Apple.

**Web Categories**

The Web Categories Setup panel allows an Administrator to set up the Primary, Secondary and Tertiary Web Category for Products enabled for the LightSpeed Web Store.

Web Categories are hierarchical, meaning that selecting a Primary Web Category on a Product will only allow you to select Secondary Web Categories that are related to this Primary Web Category and so on. When a User 'drills down' by category on your LightSpeed Web Store site, they are browsing hierarchically using your Web Categories.

Example: The Primary Web Category for the iPod Video (30GB White) could be 'Hardware, the Secondary could be 'iPods and the Tertiary could be 'iPod Video'.



**Web Keywords**

The Web Keywords Setup panel allows an Administrator to create a list of Web Keywords of which up to three different keywords can be specified for a Product that is enabled on the LightSpeed Web Store. Web Keywords are not hierarchical. When a User searches for keywords on your LightSpeed Web Store site, they are searching your Web Keywords.

Example: Web Keywords for the iPod Nano (2GB White) could be 'MP3 Player' and 'iPod'.

**Customer Categories**

Customer Categories can be created in the Customer Categories Setup panel and assigned to Customers who may receive a particular automatic discount or Pricing Level.

Example: A company that has Customers in the education market may create a Category called 'Education' that may receive an automatic discount or be assigned an 'Education' Pricing Level. Products that have special pricing for 'Education' Customers will enter their selling price in the Pricing Levels section of the Options tab of the Product window of a Product.

**Pricing Levels**

Up to five Pricing Levels can be set up in the Pricing Levels Setup panel. These are categories of alternate Selling Prices and can be assigned to a Customer Category or selected on a sales document if the 'Pricing Levels can be selected on Sales Documents' checkbox is checked.

A corresponding set of Costs can also be enabled for Pricing Levels if the 'Pricing Levels set the Cost in addition to the Selling Price' checkbox is checked. This changes the Cost in addition to the Selling Price.

The Selling Prices and Costs for each Pricing Levels are set per Product on the Options Tab of the Product window.

Example: A company may give special pricing to 'Corporate' Customers on select products. A Pricing Level called 'Corporate' would be created and this Pricing Level would have Selling Prices entered for it on the Product window of the Products that get specially priced.

Another use of Pricing Levels could be in an Apple Reseller Service environment, where the same Apple part can either be sold as an Stock or Exchange part with different Selling Prices and Costs.



**Terms**

The Terms Setup panel lets you set up different terms of payment, like 'COD' or 'Net 30', which can be set on the Terms popup of the Customer window.

The Account checkbox specifies whether the Terms allow a charge on account, like Net 30, which gives the Customer thirty days to pay their account.

**Account Status**

The Account Status Setup panel lets you set up different Account Statuses, like 'Lead', 'Active' or 'Credit Hold', which can be set on the Account Status popup of the Customer window.

Account Statuses can be re-ordered by dragging them up or down in the list.

**Payment Methods**

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.

**Quote Status**

Administrators can set up Quote Statuses in the Quote Statuses Setup panel which can then be selected by Users on their Quotes in order to properly categorize these Quotes.

Since Quotes can be searched by Status in the Browser or tracked by Status in the Tracker, creating and utilizing descriptive Quote Statuses can help a sales team organize their sales effort.

Example: A Quote Status called 'Urgent' could be created and applied to Quotes that needed immediate attention. Users could search for 'Urgent' Quotes in their Browser or monitor them in their Tracker to keep on top of this category of Quote.

Quote Statuses can be re-ordered by dragging them up or down in the list.

**SRO Status**

While several SRO Statuses have already been created, Administrators can modify and add to the list of existing SRO Statuses in the SRO Statuses Setup panel if a Company's repair procedure requires more or less trackable steps.

SROs can be searched by Status in the Browser or tracked by Status in the Tracker, so creating and utilizing descriptive SRO Statuses can help a service repair team organize their repair effort.

SRO Statuses can be re-ordered by dragging them up or down in the list.

### **SRO Additional Items**

Additional Items that may be checked in with the primary items to be repaired on an SRO can be added to the list of SRO Additional Items in the SRO Additional Items Setup panel. SRO Additional Items appear as a list of checkboxes on the SRO where you can check the items that were checked in.

Example: On a repair of a computer, you may check off Mouse or Keyboard on the SRO if those items were checked in by the Customer.

### **GSX**

GSX, or Global Service Exchange, is Apple Computer Inc's single service, repair and order management tool available to Apple's partners to conduct service business with Apple worldwide. GSX Web Services is a data exchange mechanism that allows partners to integrate their applications with GSX.

GSX integration can be set up by entering information for a GSX account in the GSX Setup panel. This single GSX account is shared by all users when doing Warranty Lookups, and you may choose to create a specific account for this purpose.

The account must have the 'Can Access Web Services' privilege enabled by Apple Service Provider Support in order for LightSpeed to authenticate securely to the GSX server.

### **Shipping Methods**

Administrators can set up Shipping Methods in the Shipping Methods Setup panel that can be selected on sales documents on the Options Tab.

Example: Courier companies like 'FedEx' or delivery methods like 'Technician' to denote that a technician will deliver the items.

### **Warranties**

Administrators can set up Warranties in the Warranties Setup panel that can be selected on SROs on the Repair Tab. Any type of warranty that could be honored or handled by the Company can be entered here.