

- 01 Introduction
- 01 Set Up Assistant
- 02 Customer Merge
- 03 Email Receipt
- 03 Matrix Import

Introduction

LightSpeed 3.1 is a significant upgrade and includes many improvements related to performance, setup, and workflows. This document contains instructions on the major new features. However, a full list of release notes can be found on the *Support/Downloads* page of our website.

Setup Assistant

Installing LightSpeed for the first time now includes an easy setup assistant that guides you through the crucial first steps of your configuration.

The Setup Assistant appears immediately after the first time you launch LightSpeed and close the Welcome screen. Go through the Setup Assistant, entering information such as your company name and address, the Users you wish to set up, and more. Below is an outline of what you can enter using the Setup Assistant.

All information set in the Setup Assistant can be modified using the Setup panel under the Tools menu within LightSpeed.

Step 1 - Company Info

Includes your Company name, Contact info, and Billing/Shipping Addresses

Step 2 - Company Logo

Allows you to drop in a 192x192 pixel logo in .png or .jpg format that will appear on your printed sales documents and receipts.

YOU SHOULD PERFORM A MANUAL BACKUP BEFORE ANY UPGRADE.

Tools > Utilities > Backup Database



Setup Assistant: Step 1 - Company Info

Step 3 - Tax Types

This is where you enter the **names** of the taxes you will charge on your sales documents. For example, "AZ" or "City".

Step 4 - Tax Rates

Allows you to set **rates** for the taxes you have named in the previous step. For example, 5.25 for "AZ".

Step 5 - POS Mode

Indicates which Mode - Scan or Button - the POS will use when launched. Scan Mode is for larger Product databases which use barcode scanners to create Invoices; Button Mode is for retailers with a smaller number of popular Products (10-200) that wish to create Invoices using the nested, drill-down categories outlined in the POS document.

Step 6 - POS Logo

Allows you to drop in a 255x140 pixel logo in .png or .jpg format that will appear in the POS screen in the upper right corner.

Step 7 - Change Admin Password

Allows you to change the main Administrator password from the default (*admin*). **DO NOT FORGET YOUR ADMIN PASSWORD AS YOU WILL BE UNABLE TO LOG INTO LIGHTSPEED, AND IT IS IRRETRIEVABLE.**

Step 8 - Create New User Account

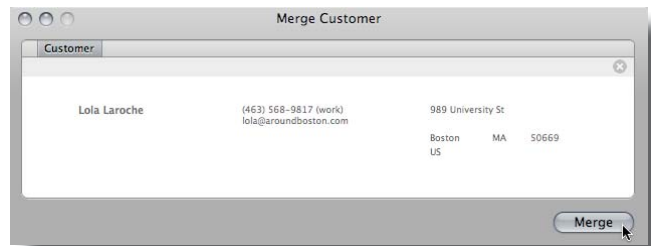
Allows you to set up a User account for login, including username and password.

Customer Merge

In the event that you have multiple Customer cards accumulated in the database representing the same Customer, you may choose to use the *Merge Customer* feature to aggregate them together into one.

To do this, you must first decide which Customer card will "assimilate" the others. Open it and select *Merge Customer* from its Action menu.

The Merge Customers window will appear. Using the Search field, locate a Customer card you wish to merge into the primary Customer. Double-click the Customer name, and click the *Merge* button. Any document associated with the Customer card you are discarding will now be associated to the primary Customer. However, for security reasons, the Customer information written on those documents will



Customer Merge

remain unchanged. If you wish to update this written info, remove the Customer from these documents and replace it with the Customer card you wish to keep.

You may only "assimilate" one Customer card at a time. Repeat the procedure outlined above if you have multiple Customer cards that you wish to merge into your primary Customer card.

Email Receipt

The introduction of LightSpeed 3.1 brings the ability to email Invoice receipts right from the POS.

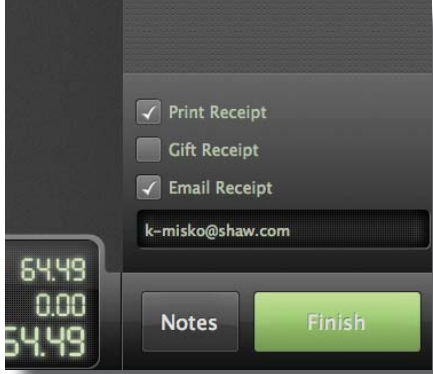
To set up your Mail Server, go to **Tools > Setup > Advanced > Mail Server**. For information on what data to enter into each field, access the account information of your email server. For example, in OS X Mail, go to the Preferences panel and click "Accounts". Select the Account you wish to integrate with LightSpeed, and follow the steps outlined below to gather the necessary info.

- Username** - User Name (if applicable)
- Password** - Account Password (if applicable)
- Host** - Outgoing Mail SMTP Server
- Port** - Default Port
- Use SSL** - Enable/Disable SSL Encryption
- Use Transport Layer Security** - Enable/Disable TLS
- Use Authentication** - Enabled if you use a Username/Password

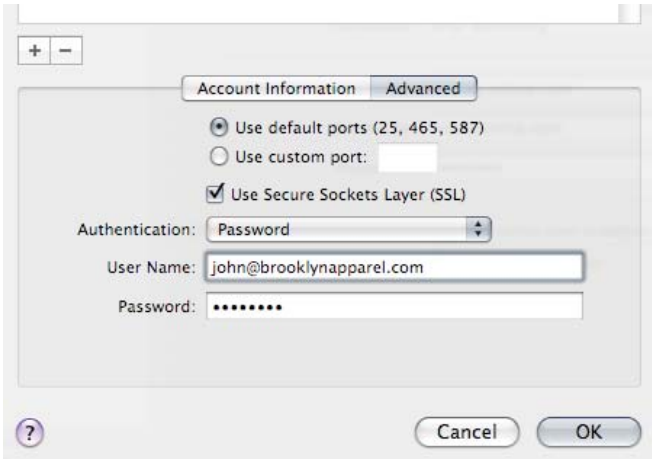
The basic steps to configure the Mail Server setup panel are:

1. Write down the Outgoing SMTP Mail Server (Host) name.
2. Click the pop-up menu and select *Edit Server List*.
3. Write down your User Name and Password, if they are entered.
4. Note whether your SSL is enabled.
5. Write down the first default port listed.
6. Enter this information into the Mail Server Setup panel.

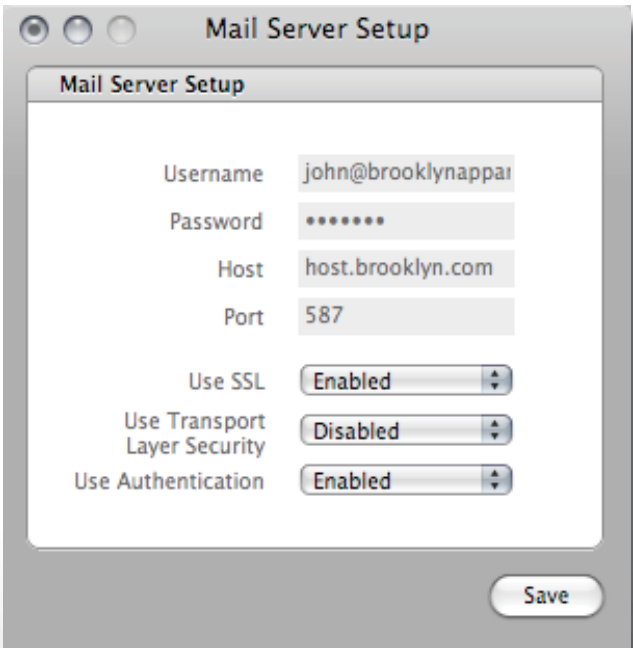
If you are unsure about whether you should enable your Transport Layer Security, or if you have any questions about these fields, contact your mail server administrator.



POS Email Receipt



OS X Mail Account Info



Mail Server Setup

Matrix Import

LightSpeed 3.1 also brings the ability to import size-color combination Products that use the matrix Master/Child relationship. This relationship of a Master Product, representing a style common to several combination Products, and its Child Products allows facilitated purchasing and inventory management. For more information on how to use this workflow, please see the *Size-Color Matrix* document on our Training page.

Please see the *Import Tools* document for more information on importing, and the *Import Templates* files for the proper order of the fields to import. **IMPORTANT:** Sizes and Colors must exist in LightSpeed prior to any importing of data.

To import both Master and Child Products using *Import Tools*, your original data file must be in the following format (see image):

Product Code

- Master - Main Code
- Child - Master Product Code-Color-Size

Description

- Master - Main Description
- Child - Master Description, Color, Size

Master?

- 1 or Y = Yes
- 0 or N = No

Master Code


- Master - leave blank
- Child - Master Product Code

Color

- Master - leave blank
- Child - Color

Size

- Master - leave blank
- Child - Size



IMPORTANT: It is strongly recommended that you perform a backup of your database before importing any data, and that you attempt your first import with only a few records from your source data to ensure a simple resolution if the import has errors.

Product Code	Description	Master?	Master Code	Color	Size
JACKET	Mens Jacket	1			
JACKET-blk-1	Mens Jacket, blk, 1	0	JACKET	blk	1
JACKET-blu-2	Mens Jacket, blu, 2	0	JACKET	blu	2

Matrix Import File Format