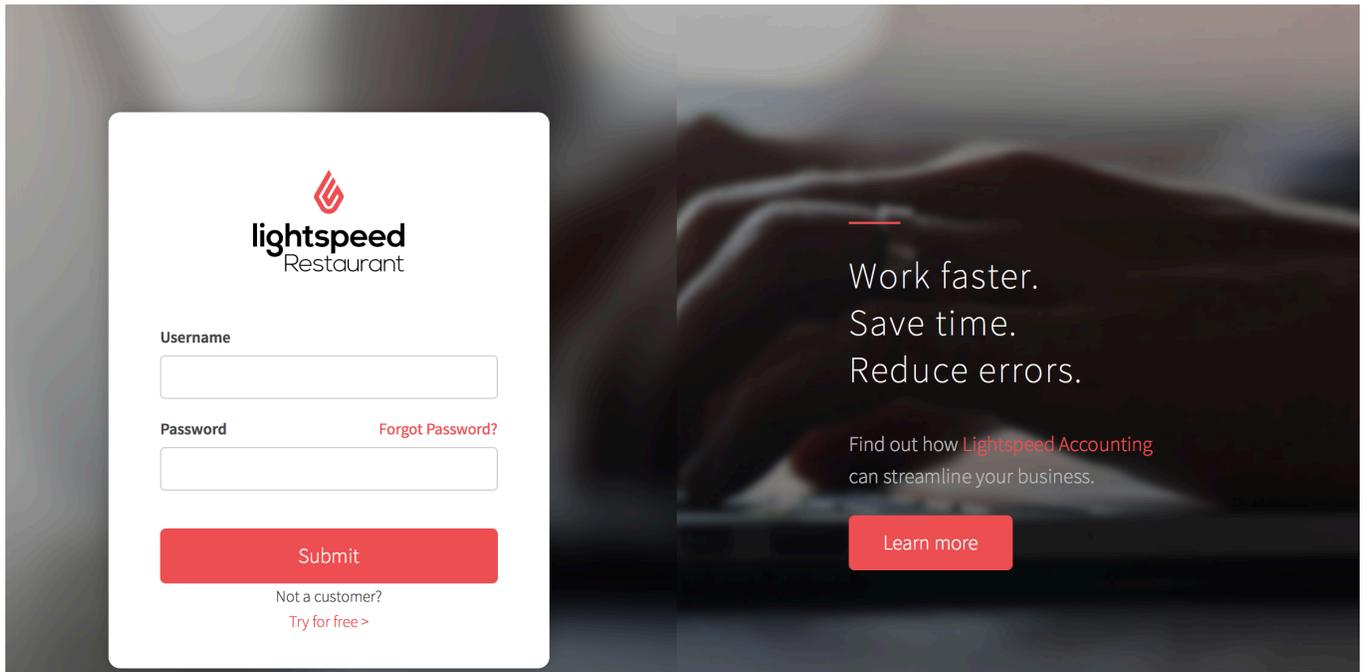## Lightspeed Restaurant Manager

Logging into your account:
From the Lightspeed website (www.lightspeedhq.com) Click on "**Login**", select "**Restaurant**" and enter the email and password associated with your account. Or go to: http://www.lightspeedhq.com/products/restaurant/login/

Settings

Completing Your Company Settings:

In the top right-hand corner of the page, click on the "settings" link ⚙ to access the **Settings** page of your account. Fill in all the required (*) information in the **Company Details** tab; this information will print on the receipts.

Also complete the: **Tax Number**, **Time Zone** & **DST ID**, **Locale Settings** and **Opening Time** (The Opening time does not need to be the actual opening time of the restaurant, it is the time that your Day Report will reset every day.) **SAVE**.


Suggested Settings:
- ✓ **Report Settings**
    - o Book Receipts on the day the receipt was finalized
    - o Add creation date and time in reports.
    - o Show voided ticket details in day and user reports.
    - o Show payment information in detailed receipt sections
- ✓ **Print Settings**
    - o Number of decimals set to 2.
    - o Number of decimals tax rate set to 2.
- ✓ **App Settings**
    - o Subtotal price precision set correctly.
    - o Receipt total price precision set correctly.

Users

Setting Up Your User Role Permissions:
In the "**Users"** section, select the "**User Groups**" tab and review each user role and customize the permissions you would like to allow for each of your user groups. Click on a permission to activate (in green).
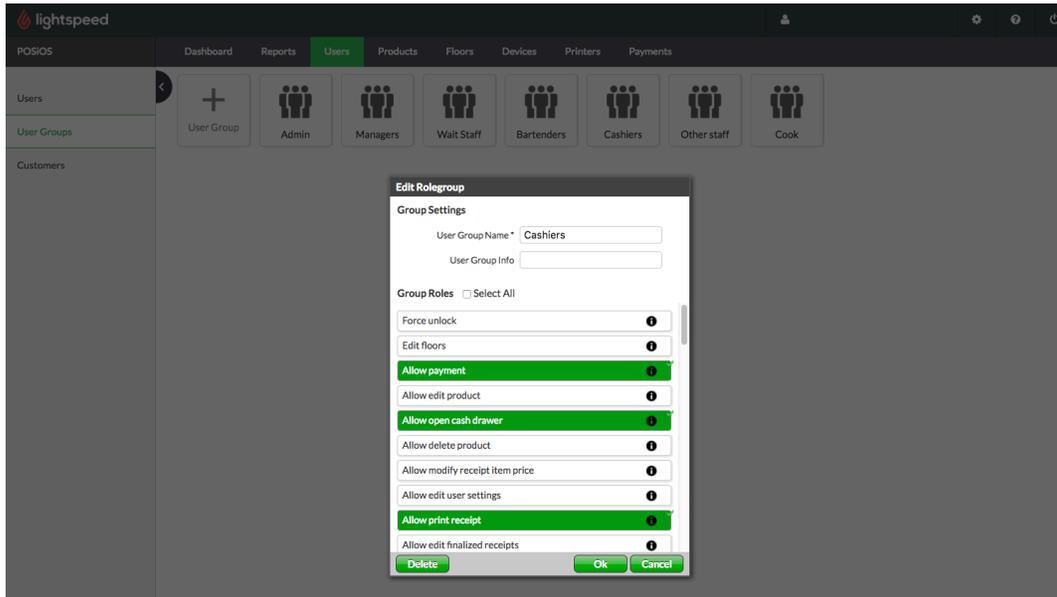
Setting Up Your Users:
In the "**Users"** section, select the "**User**" tab and click on "**Add User**" to create a user for each of your team members. Fill in their **Name**, **Password. PIN** and click **OK**.
Make sure the user type is the right one. Manager types will have access to the back-end with their own username and password, Employee types won't.
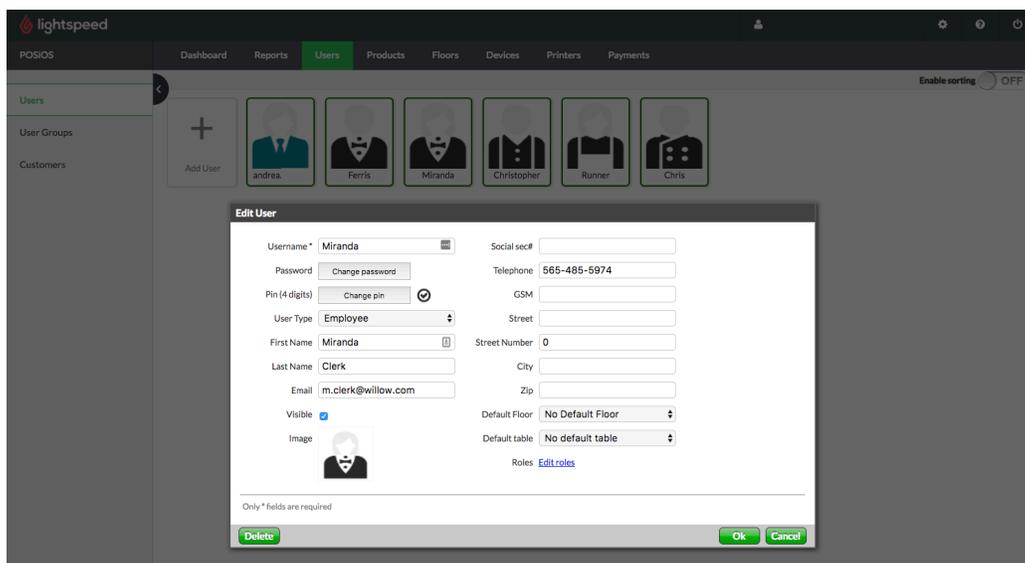
Assigning The User Roles to the Users:

Still in the "**Users"** section, in the "**User**" tab, once a user has been created; a "**user group**" profile can be assigned to it. Click a User and then click on the "**Edit Roles**" option at the bottom/right corner.

When you first create a user, it is allowed every permission by default. The first step is to remove all the permissions. For this click on "Additional Roles" and then click on "Deselect Roles".

Once this is done you can select the User Role profile you would like to assign to each user by clicking on "Groups" and then the profile you want.
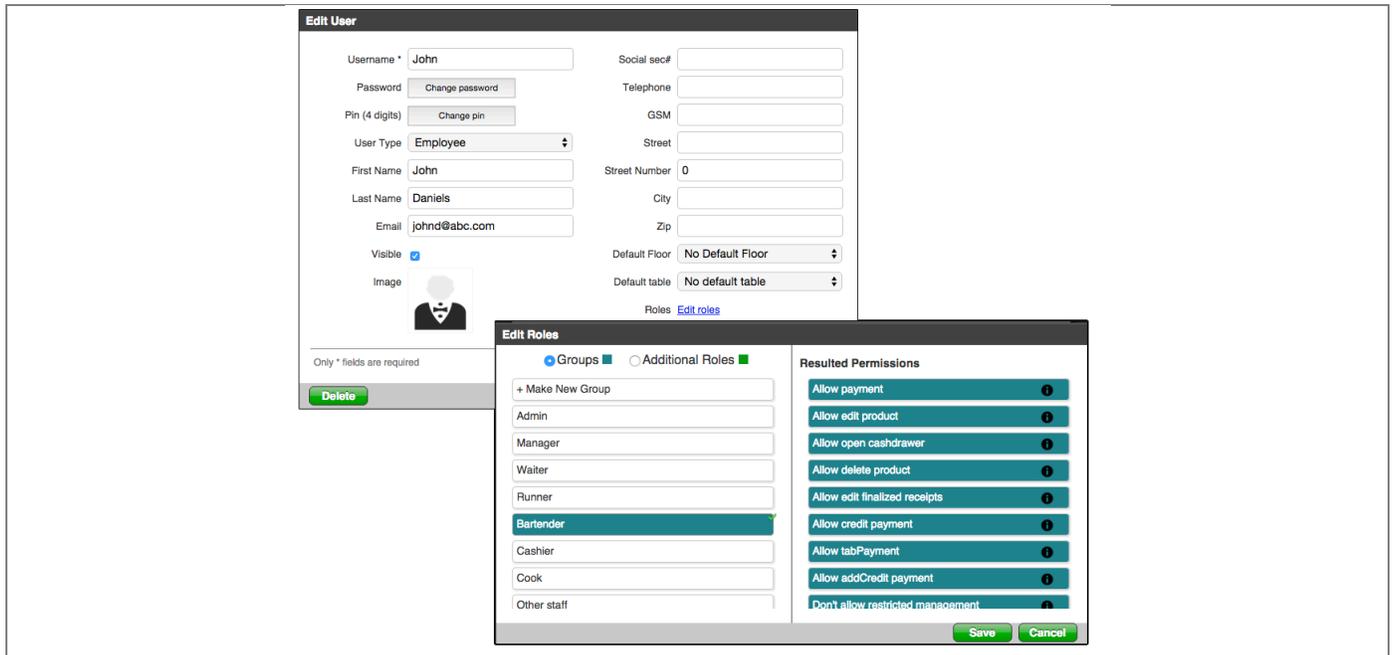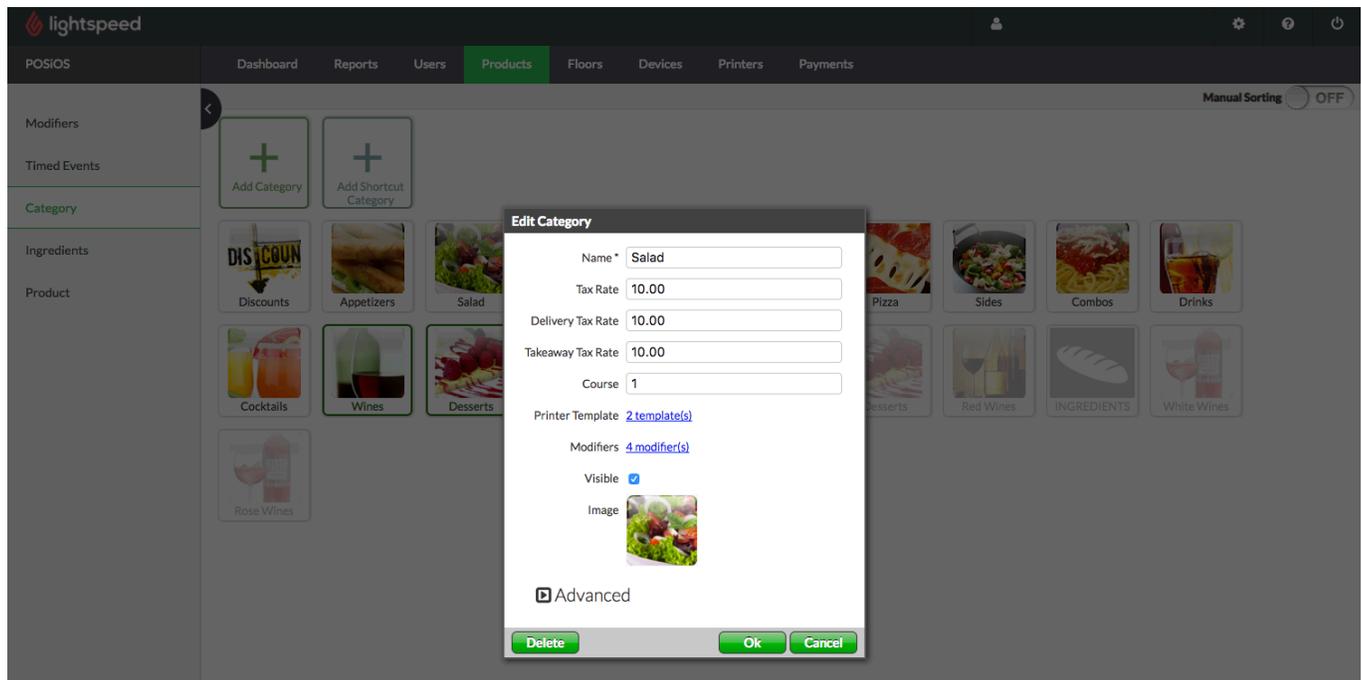
Menu

Creating Your Menu Categories:
In the "**Product"** section, select the "**Category**" tab and begin by creating each of the categories for your menu.
Fill in the **Name**, **Tax Rates** and select an **Image** for each category.
If you decide to use the coursing feature in Lightspeed, enter the coursing order that will be applied by default
(e.g. Salads=1. Mains=2. Desserts=3)
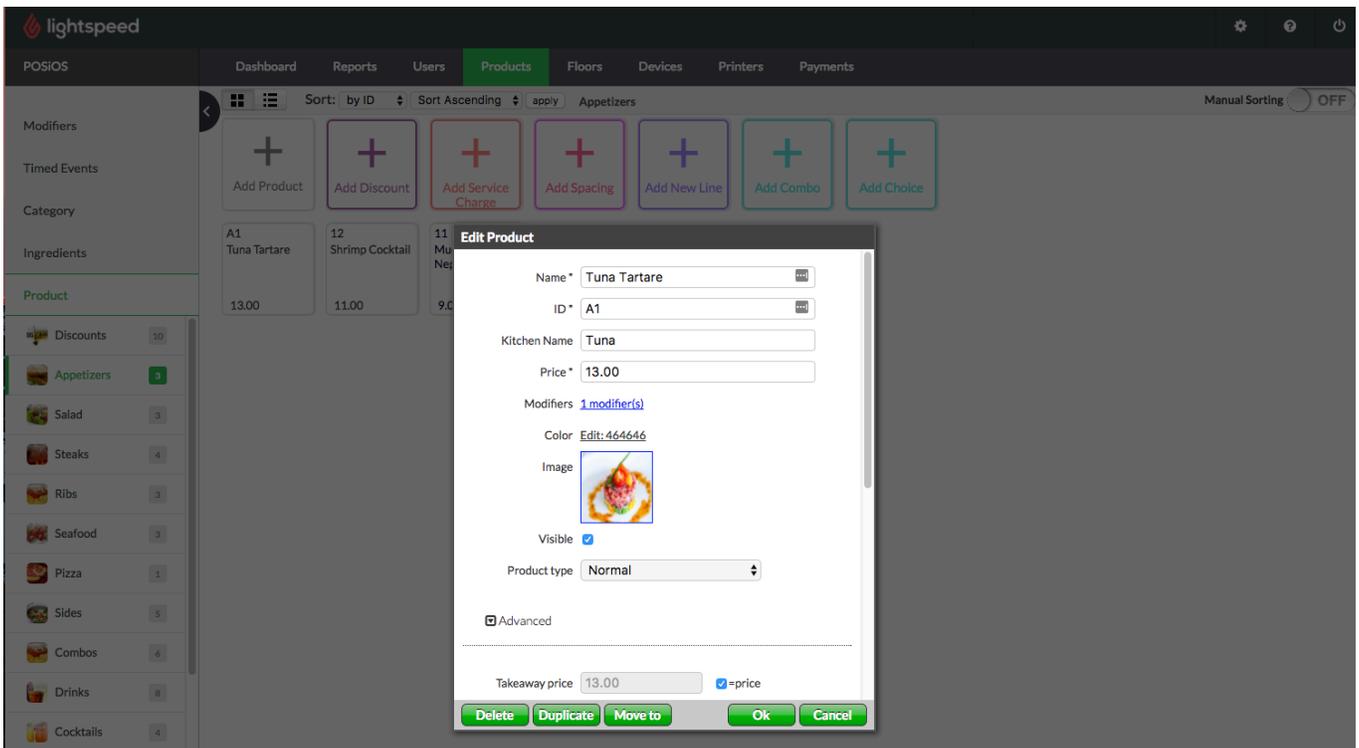

Creating Your Menu Products:
In the "**Product"** section, select the "**Products**" tab and you will see the menu categories listed in the left hand
tabs area. Select each of the categories tab and begin adding the products to each of the categories.
Fill in the **Name** and **Price** (before taxes) for each product.
In the **Kitchen Name** you will be able to enter the name that will print in the kitchen ticket. If you would like to
use the same name as in the menu, just leave it blank.
Regarding the **Product type**, it affects what happens when the product is selected on the Order screen in
Restaurant POS:

- Normal: The product is automatically added to the order at the specified price.
- Amount popup: A popup appears asking you to define the product quantity for the order.
- Open Price: A popup appears asking you to define the product price for the order.

Creating Your Menu Modifiers:

In the "**Product"** section, select the "**Modifiers**" tab to create any specific menu variances or "modifiers" for your menu items (ie: Salad dressing choice, cooking temperature, Dessert Toppings etc.). Click on "**Add group**" to add a new modifier. Give the modifier a **Name** and add the list of options under **+New Modifier**.

Modifiers can have an extra price or even have a negative amount (e.g. -$0.50 for bringing your own coffee mug).
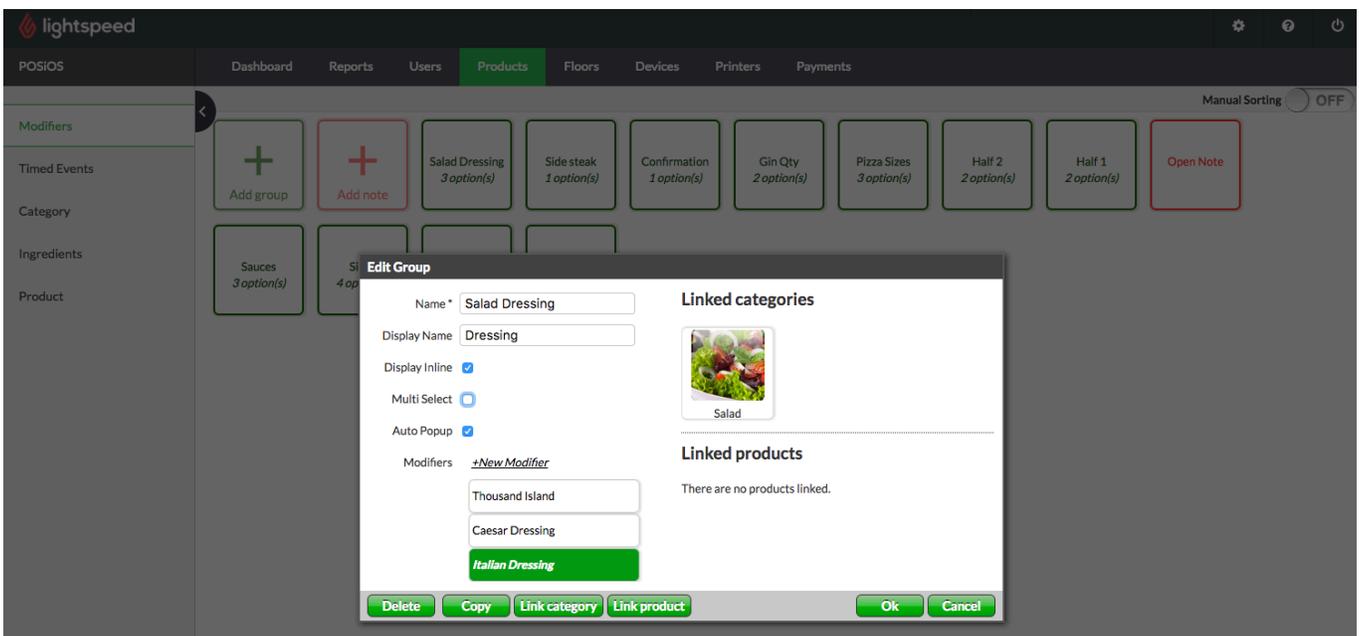
Linking Your Modifiers to Your Products or Categories:
Your modifiers can be linked to all the products within a category, or to individual products.
For this, in the "**Product"** section, select the "**Products**" or **Category** tab. Select the product/category to open the "**Edit**" window and click on the "**modifiers**" link to open the modifier extension where you can now highlight the appropriate modifier(s).

Creating a Fixed Combo Product:
In the "**Product"** section, select the "**Products**" tab and then a **Category**. Select "**Add Combo**", Fill in the **Name** and select the "**+Choose Subproducts"** link to access the list of existing menu items that you can click on and add to your fixed combo. Click **OK** to save. Click on the Combo Item again to "**Edit Price** ".

Creating a Choice Product:

In the "**Product"** section, select the "**Products**" tab and then a **Category**. Select "**Add Choice**", Fill in the **Name** and select the "**+Choose Subproducts"** link to access the list of existing menu items that you can click on and add to your choice menu item. Click **OK** to save.
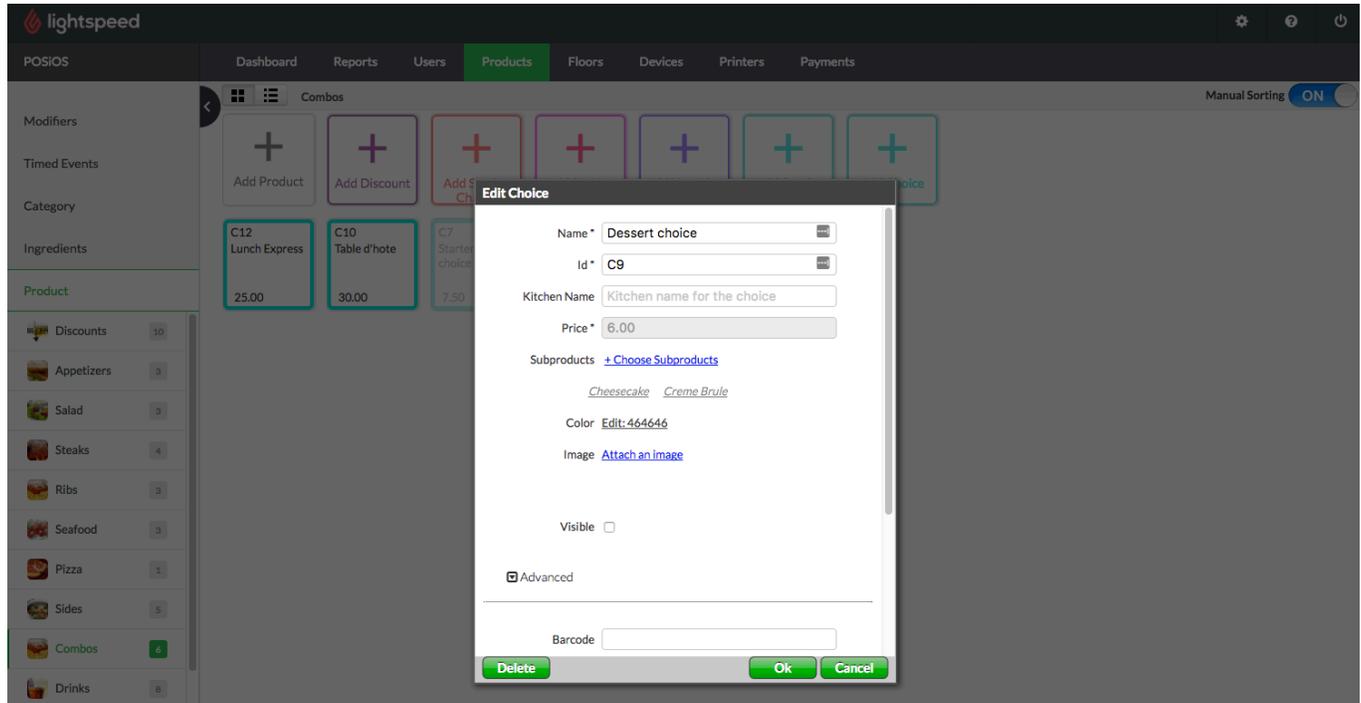

Creating a Choice Combo Product:

In the "**Product"** section, select the "**Products**" tab and then a **Category**. Select "**Add Choice**", Fill in the **Name** and select the "**+Choose Subproducts"** link to access the list of existing menu items that you can click on and add to your choice menu item. Make this product "invisible" by unchecking "visible". Click **OK** to save. Create a choice item for each choice you would like to include in your choice combo by repeating the steps above. Then, select "**Add Combo**", Fill in the **Name** and select the "**+Choose Subproducts"** link to access the list of existing menu items that you can click on and add to your combo. Select the choice menu items that you made "Invisible." Click **OK** to save. Click on the Combo Item again to "**Edit Price** ".
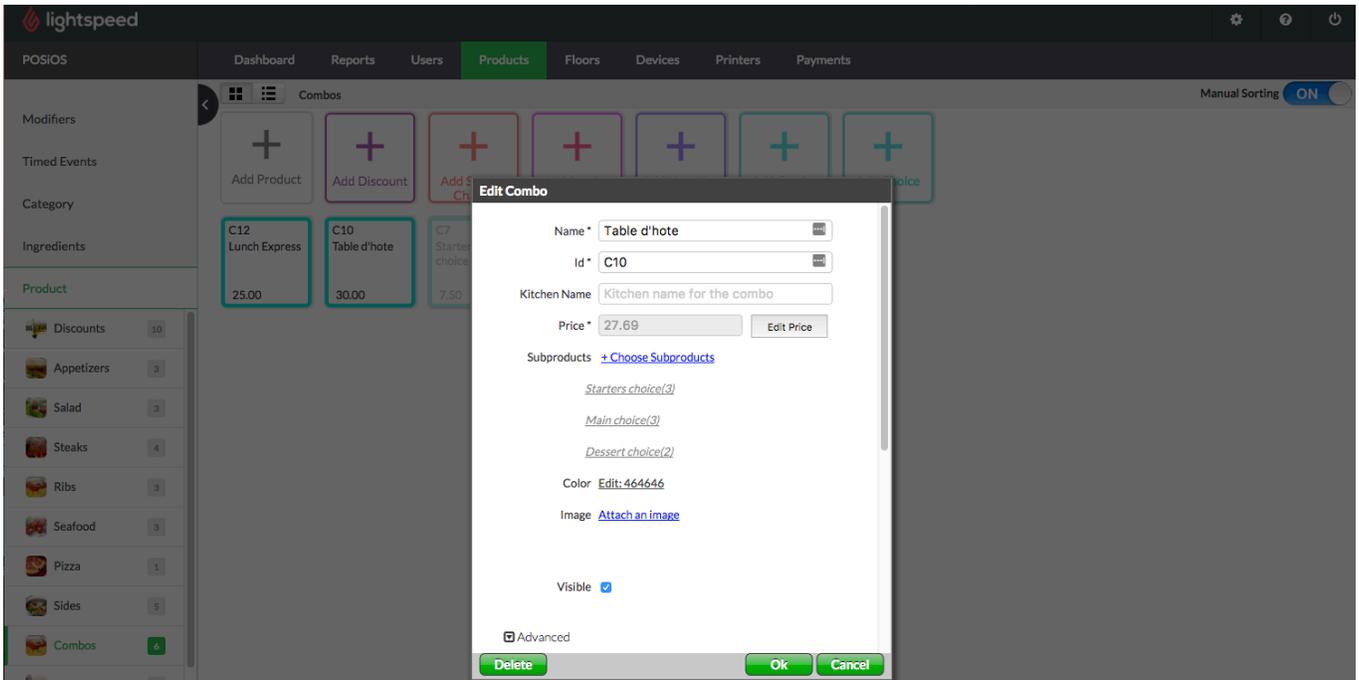
Creating a Discount:

In the "**Product"** section, select the "**Products**" tab and then the "**Discount**" **Category** tab. Select "**Add Discount**" and fill in the **Name** of the discount, enter the discount amount in the **Discount** field and select a **Discount Type**. Click **OK** to save.

For more information on discount types and other specifics, please visit the following link: https://resto-support.lightspeedhq.com/hc/en-us/articles/226305387-Creating-discounts
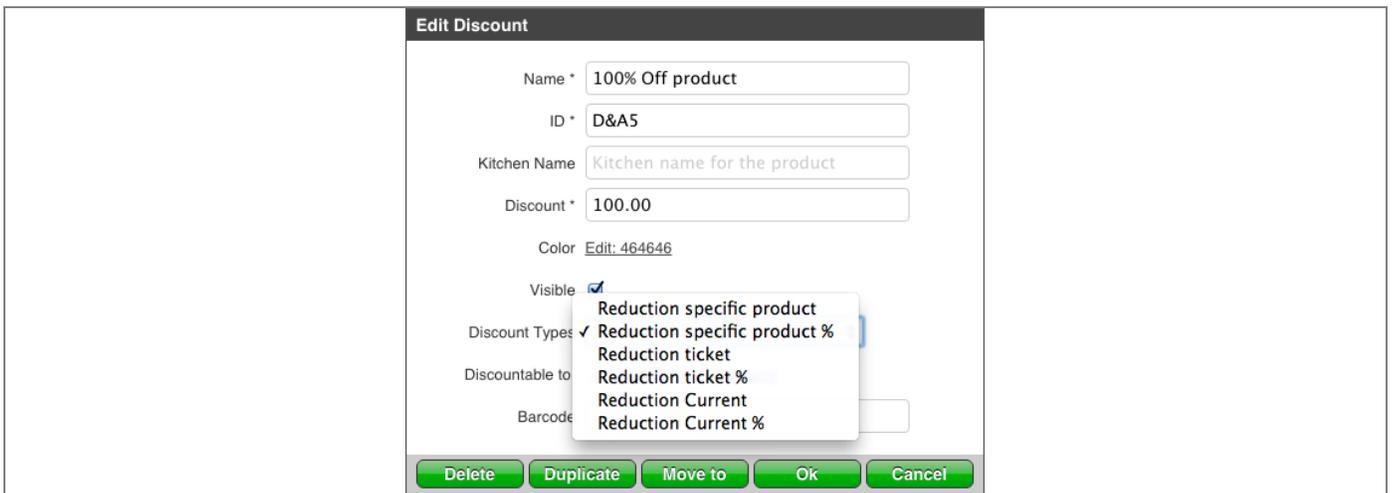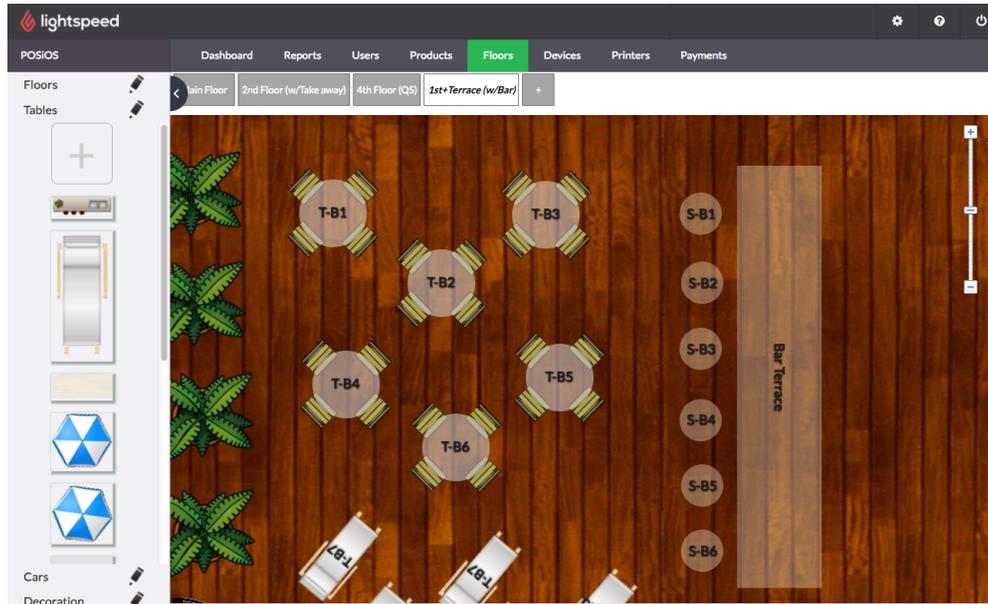
Floors

Creating Your Floor Plan (For Table Service Restaurants with Seat Management):
In the "**Floor Planner**" section, select the "**+**" button to add a new floor or click on the existing floor plan to Edit. Give the Floor a **Name** and select "**iPad Landscape**" from the "Default sizes" dropdown window (1024 x 690). From the **Floor** tab, in the left-hand side, select floor background, from the list of available options or click on "+" to upload your own image. From the table tab, select a table from the list of available options to add it to the floor plan or click on "+" to upload your own image. For each table fill in the **Name**, select "**Restaurant**" as the **Type** and set the **width** and **height** of the table. You can also add the number of seats and set the table shape.
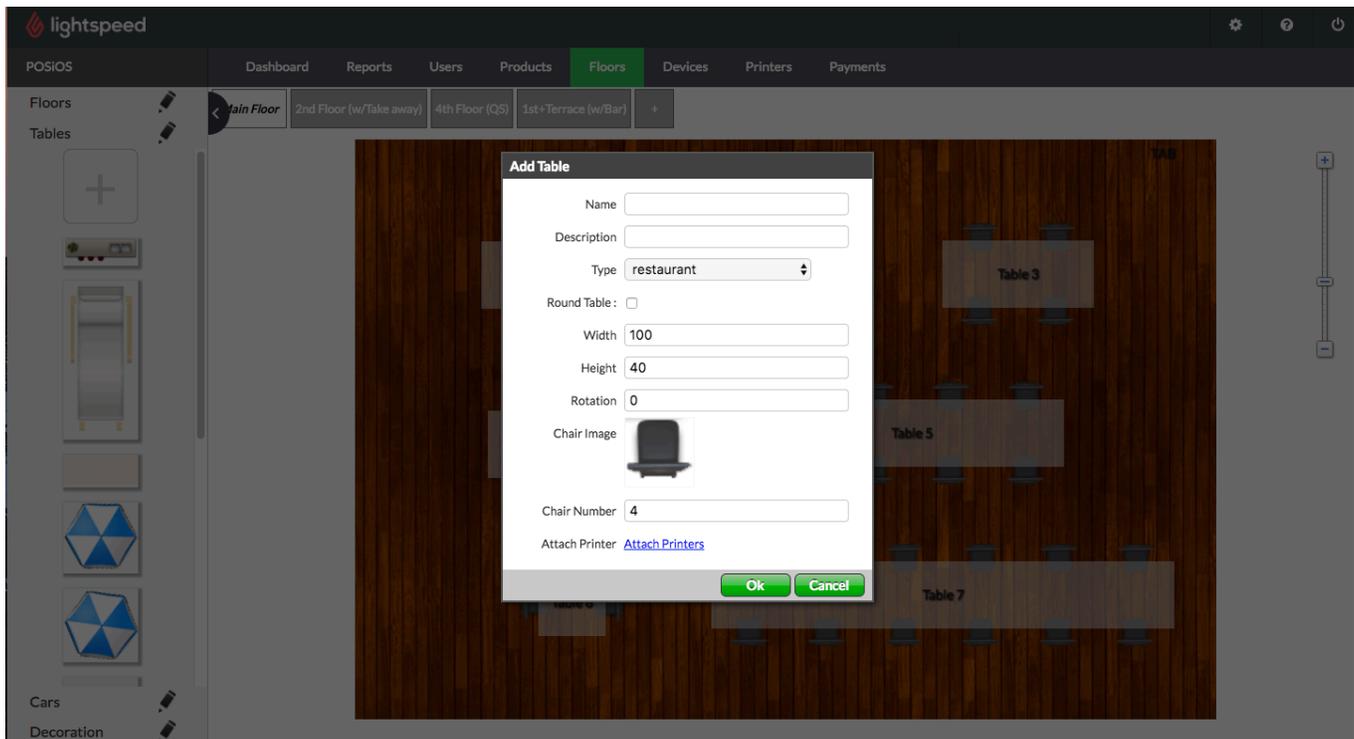
To create a bar, add one table, fill in the **Name** field as "Bar", select "**Bar**" as the **Type** and set the **width** and **height** of the table, do not add chair numbers. Then to add seats, add a table, you can use any of the colors available and make it round, or even upload the image of a chair as a table. They name it, for example, B1 (for Bar) and make sure it was 0 chairs. Place it next to the "Bar" as a chair.

Creating Your Floor Plan (For Counter Service):

In the "**Floor Planner"** section, select the "**+**" button to add a new floor or click on the existing floor plan to Edit. Give the Floor a **Name** and select "**iPad Landscape**" from the "Default sizes" dropdown window (1024 x 690). From the **Floor** tab, in the left-hand side, select a floor background from the list of available options or click on "+" to upload your own image. From the table tab, select a table from the list of available options to add it to the floor plan or click on "+" to upload your own image (Your Logo?). Set up that "table" as Type BAR; you will be able to use this as a button to open the ordering screen.
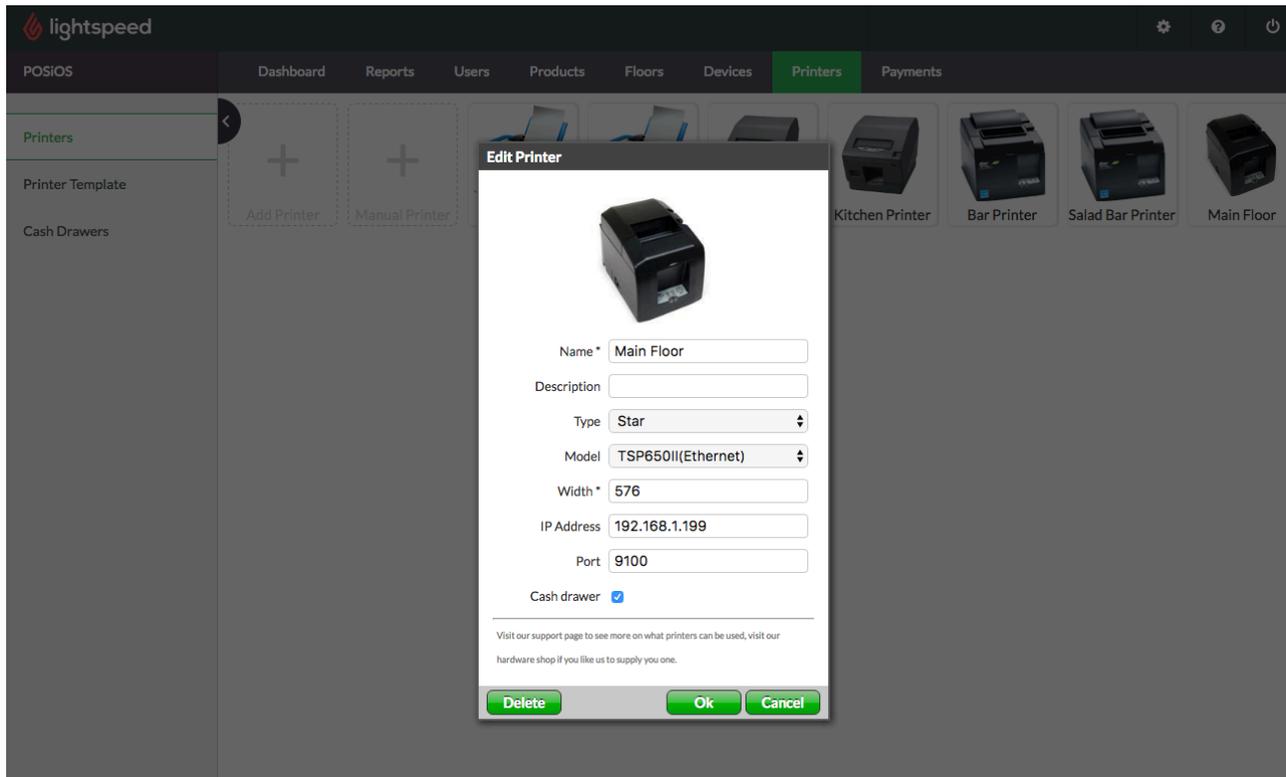

Customer Success
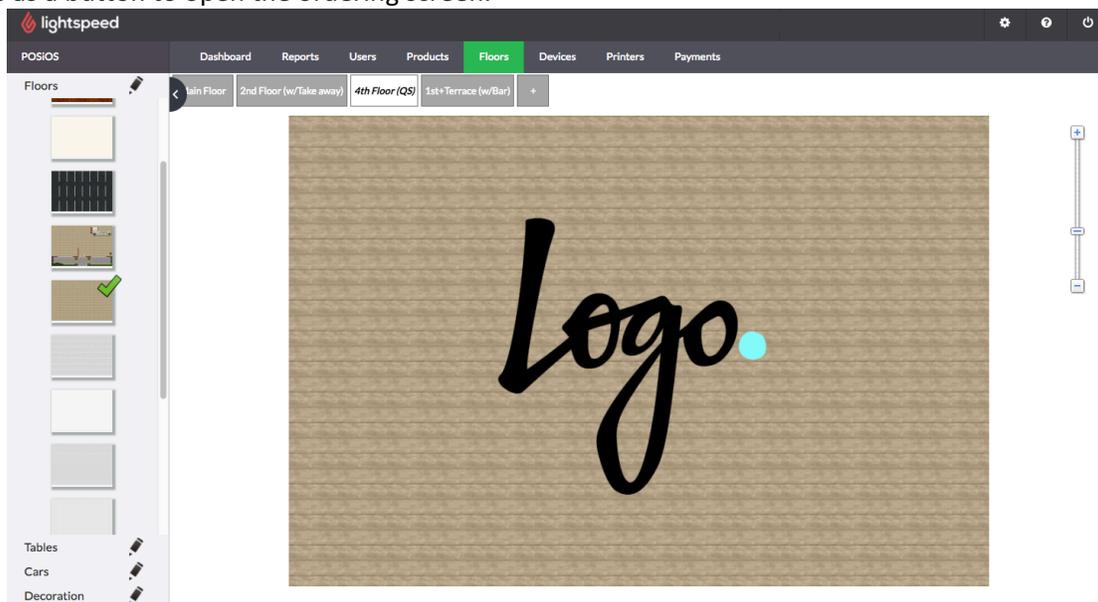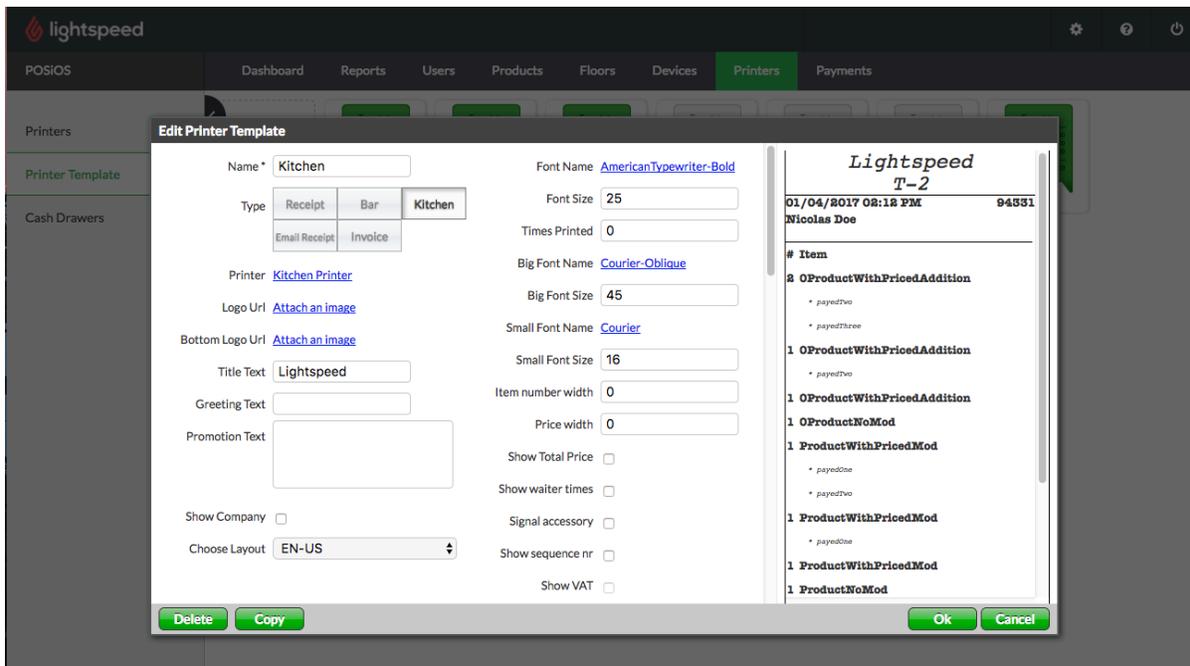
Printers

Adding Printers

In the "**Printers"** section, select the "**Printers**" tab and select "**Add Printer**" to add each of the printers. Fill in the **Name**, the **Type**, the **Model** and the **IP Address**. (i.e.: Kitchen Printer, Bar Printer, Receipt Printer).

If you have a cash drawer attached to one of the printers, remember to select the box next to "Cash Drawer".

Adding Printer Templates

In the "**Printers"** section, select the "**Printer Template**" tab and select "**Add Template**" to add each of the printer templates required (i.e.: Kitchen Template, Bar Template, Receipt template). Fill in the **Name**, select the **Type** and link each template to its corresponding **Printer**.

✓ **Suggested Printer Template Settings:**
  o Receipt template: Show VAT is **on**.
  o Receipt template: Price Width set to **6.**
  o Receipt template: Show Total Price is **on**.
  o Receipt template: Show company is **on**.
  o Receipt template: Show waiter times is **on**.
  o Receipt template: type is set to **receipt**.
  o Receipt template: Layout is EN-US if possible.

  o Kitchen/bar template: Show Total Price is **off**.
  o Kitchen/bar template: Price width is set to **0**.
  o Kitchen/bar template: Show VAT is **off**.
  o Kitchen/bar template: Show company is **off**.
  o Kitchen/bar template: Show waiter times is **on**.
  o Kitchen/bar template: type is set **to Kitchen/Bar**.

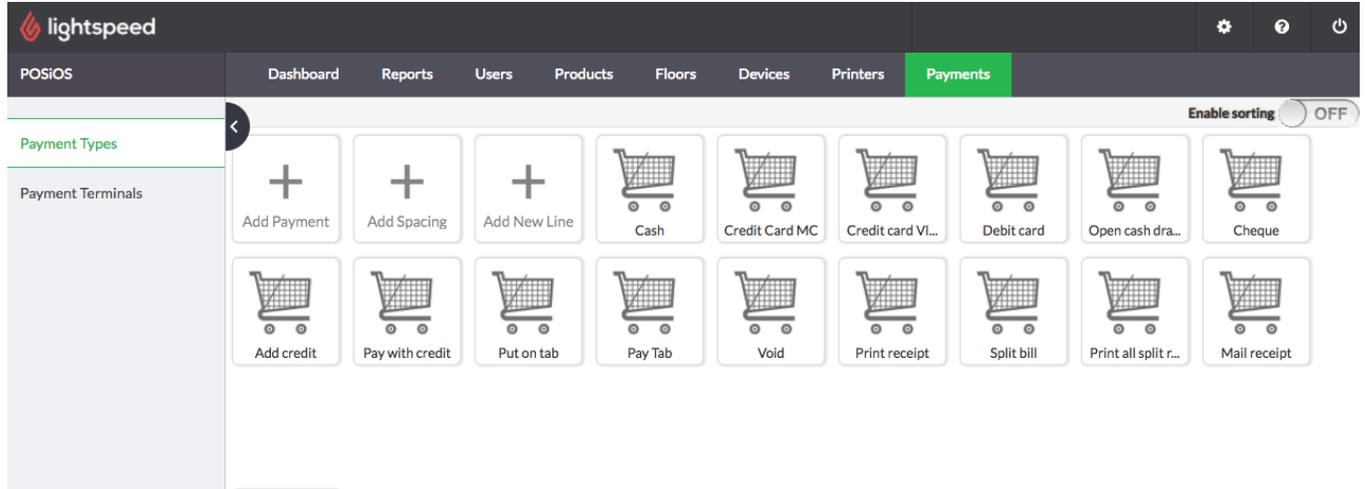## Adding a Cash Drawer
In the "**Printers"** section, select the "**Cash Drawer**" tab and select "**Add Cash Drawer**" to add each of the Cash Drawers you would like to manage.

Customer Success
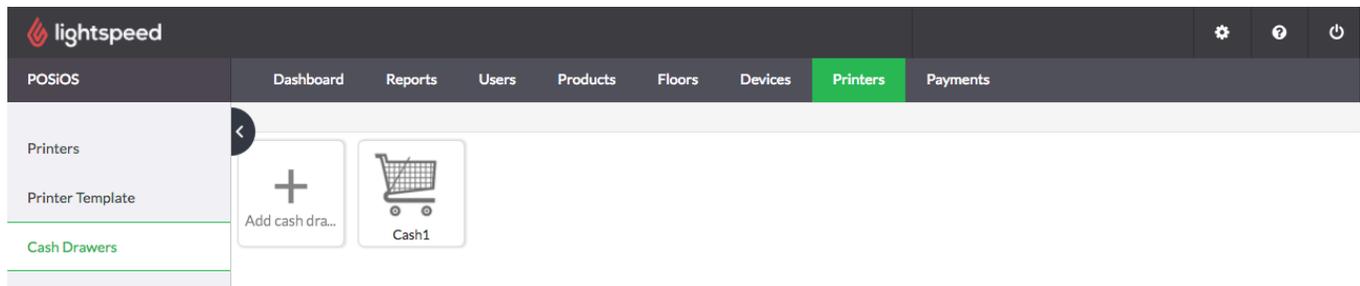
Setting Up Your Payments Types:
In the "**Payments**" section, select "**Add Payment**" to add each of the Payment types you would like to manage.
Fill in the **Name** and select the appropriate **Type**.

FAQs:

In my Brunch category I have drinks that need to print to the bar (i.e. Mimosa, Bloody Mary) and also food items that need to print to the kitchen. How can I achieve this?

This can be achieved by using a Shortcut category. Shortcut categories allow you to select existing products from other categories and have them display together in one category. In order to create a Shortcut category, navigate to categories and click + Shortcut Category. Next click on Products and select the Shortcut category from the list on the left hand side. Click + Product. You will see that you are not able to create a new product in the Shortcut category, only choose from existing products from other categories.

I wish to have certain staff of mine clock-in and out with the software, but not have access to the actual POS.

To give certain users the ability to clock in/out but not access the Point of Sale, simply assign them to the "Cook" user group (this group can be renamed if desired). Navigate to Users. Click on a user. Click Edit Roles. Click "Additional Roles" and then "Deselect Roles". This step is necessary to ensure that all permissions are removed. Next click "Groups" and select "Cook". Click Save and OK.

I have multiple printers and I would like certain areas of my restaurant/bar to print automatically to a particular printer. How can I do this?

To begin with you must create a printer template for each printer that you would like to print to. For example, if you have a printer at the bar and a printer at the waiter station and would like to be able to print receipts at both you would need to have two receipt templates, each linked to the appropriate printer. If you have two bars and would like drinks ordered in a particular section to print at the first bar and drinks from another section to print at a different bar, you would need to create two bar templates and assign each of these to the appropriate printer.

There are two ways to assign your printer templates. To avoid printing conflicts, we recommend choosing *one* of the following methods:

1. **Floor plan**. Navigate to Floor Planner and select the appropriate floor. Click on an empty part of the floor plan and an "Edit Floor" window will open. Click Attach Printers and select the printer(s) that you would like to attach to that floor. You can even attach printers to specific tables - just click on the table instead of the floor and Attach Printers.

2. **Devices**. Navigate the Devices section. Click on the appropriate device (Hint: it helps if your iPads have distinctive names). You can select a template for Main Printer (Receipt), Bar or Kitchen in there.

Note: It is only necessary to assign printers to devices or floors if you have multiple printer template of the same type. If you only have one kitchen, bar and receipt template then you do not need to assign the templates to a floor/device.