Setup checklist

The Setup Guide summarizes all the steps listed in the Getting Started Guide to launch Lightspeed Restaurant K Series at your business. Ensure that you have completed all the steps by going through them again carefully.

Introduction

Once you have purchased the Restaurant software, you will receive an email with your login credentials.

- ❏ Log in to your Back Office with your Lightspeed credentials.
- ❏ Choose a configuration which best fits your business needs.
- ❏ Review the Setup Guide.
- ❏ Sign up for each webinar **1 - Menu setup**, **2 - Account customization**, and **3 - Hardware and payments** via email or phone or use the Onboarding page.

Step 1 | Menu setup

Menu management
Set up the items, categories and menus from your Back Office that will appear on the POS.

- ❏ Complete the import document.
- ❏ If you need additional assistance with the import, book a 30 minute Onboarding check up session via phone or email.
- ❏ Send the import document via email to your Product Specialist.
- ❏ Once the import is done, check your menu and assign the correct VAT to your accounting groups (categories).

Set up devices
Connect and manage your devices.

- ❏ Download the Lightspeed POS (K) app and generate a connection code to connect your iPad app to the Back Office.
- ❏ Manage the device settings and define POS configuration (device profile).

Step 2 | Account customization

Business settings
Add your business details, POS configurations and optionally other locations that you may have.

- ❏ Add your business settings.
- ❏ Divide the business day into reporting shifts.

User management
Add new users and manage permissions.

- ❏ **POS Users**: Add POS users for anyone permitted to use the POS app and assign user permissions.
- ❏ **POS user groups**: Add user groups and assign POS users to this group.
- ❏ **Back Office users**: Add Back Office users for anyone permitted to access the Back Office.

Floor plan management
Create your restaurant's floor plan.

- ❏ Add floor plans and tables to the Back Office.

Step 3 | Hardware and payments setup

Printers
Set up and manage receipt and ticket printers. If using Lightspeed secured Networks (Ignite Net / Unify) contact Support to set up Network.

- ❏ **Printers:** Add and connect printers.
- ❏ **Test printers**: Run a test print by sending an order to your kitchen bar. Print a receipt.
- ❏ **Printing profiles:** Add printing profiles to configure copy and back printer settings.
- ❏ **Production center:** Add production centers.
- ❏ **Setup printing structure:** Link Restaurant areas to production centers and link configurations to printing profiles.
- ❏ **Receipts:** Create your receipt template.
- ❏ **Transaction testing**: Run a 0.01 test transaction of your currency on every payment terminal to make sure everything is good to go.
- ❏ **KDS**: If using a KDS, connect and set up your device.

Payments
Manage your payment settings.

- ❏ **Payment method:** Add all required payment methods.
- ❏ **Payment terminals:** Contact support to add Payment Terminals.
- ❏ **Account Profiles**: Set up account profiles for different sales scenarios such as takeaway, delivery or happy hour.
- ❏ **Currencies:** If you support multiple currencies available, send a request to support to have these currencies created.

- ❏ **Discounts:** Set up discounts, and edit POS users or user groups to grant access to the discounts.

Step 4 | Training checklist

- ❏ Visit our Training checklist, Help Center pages, and YouTube channel to train your staff on how to use Lightspeed POS.

Step 5 | Launch

- ❏ Complete the Training checklist.
- ❏ Once all steps above and the Launch checklist have been completed you are ready to go live.
- ❏ Select the **Launch** button to activate your account. This step must be completed or your account will remain in DEMO mode.