



Quick Start Guide

2021 Edition

Welcome!

Firstly, we would like to take the opportunity to say thank you for choosing ShopMate. We know how important the till is to your store and we work hard to make ShopMate the simplest, most versatile and consistently reliable EPoS system available.

We'll call you in the coming weeks to see how you're getting on with ShopMate and whether there is anything more you need. In the meantime, if you have any queries or comments, feel free to get in touch by using the contact details on the back of this guide.

Enjoy your new EPoS system!

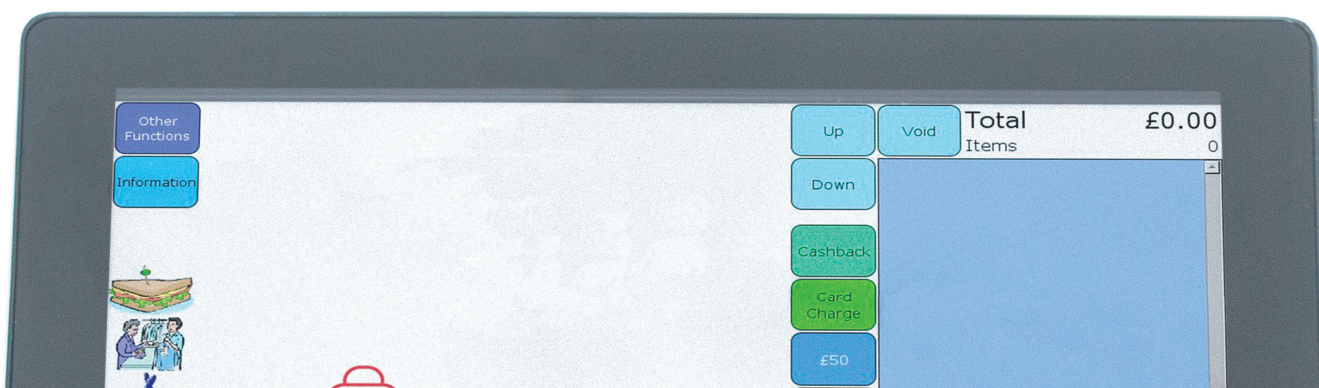
Stephen Burnett

Founder & Managing Director



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Turning ShopMate On

The power button is located behind the screen on the base of the till. Press this once and the till will start. You should hear a beep, see your screen turn on as well as your barcode scanner.

The ShopMate software will automatically load and you'll be ready trade in a few moments.



ShopMate Power Button

IMPORTANT!

Do not use this button to shut down ShopMate unless instructed to by a member of RDP support. Doing so can cause damage to your hardware.

Turning ShopMate Off

Step 1:

Press the **Other Functions** button located at the top left of the screen.



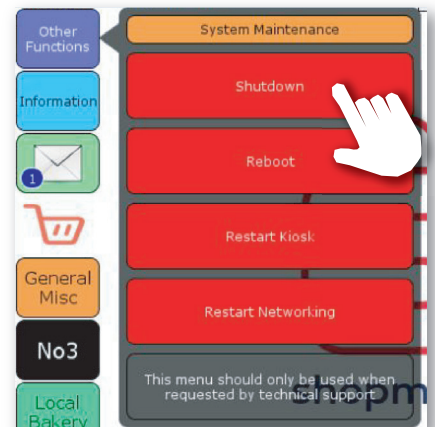
Step 2:

In the menu that appears, select **System Maintenance** which is in red at the bottom.



Step 3:

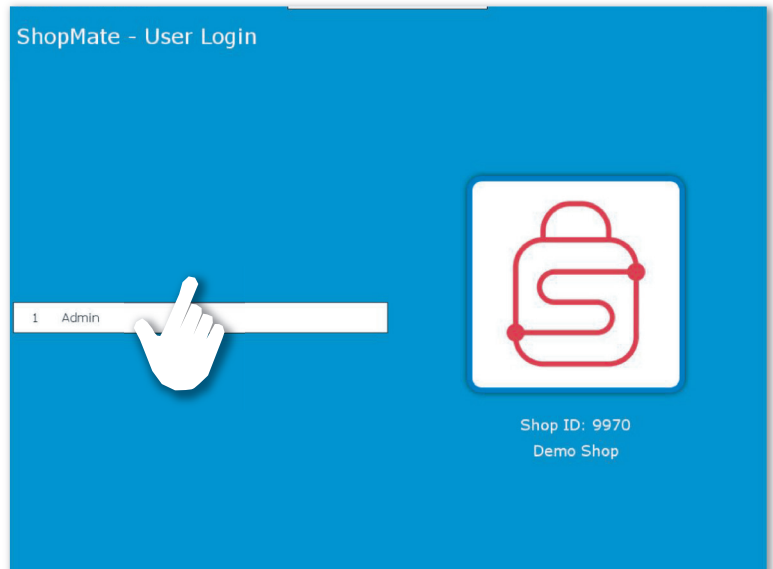
Select **Shut Down**, which is the first option. The till will then carry out a safe shutdown.



Logging on to ShopMate

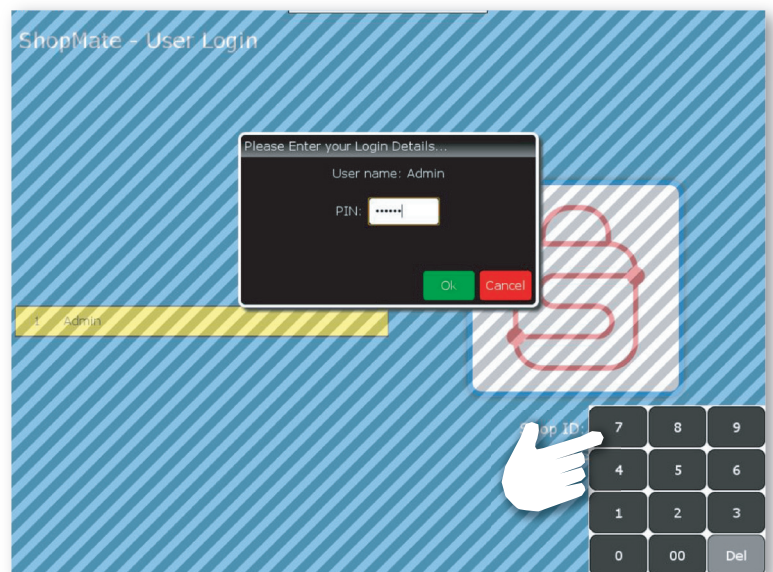
Step 1:

Select the desired user.
This will be Admin until
you have created others.



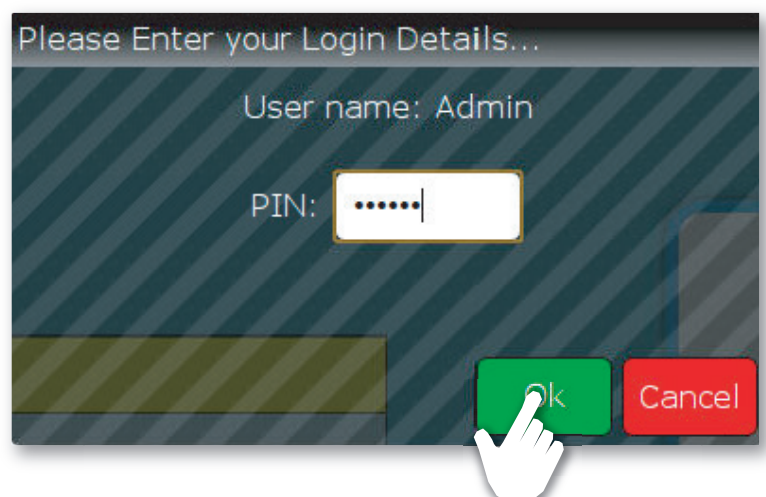
Step 2:

Enter the default
password you received
in your confirmation
email.



Step 3:

When you're done,
press **OK**. If entered
correctly, you will see
Pin OK - logging you in.

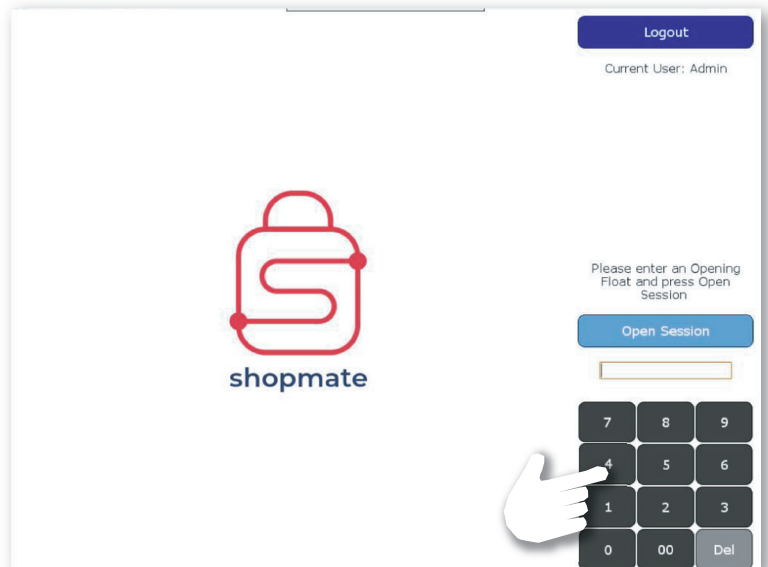


Setting a Session Float

The first time you log in, or when there is no open session, you will be prompted to enter an opening float.

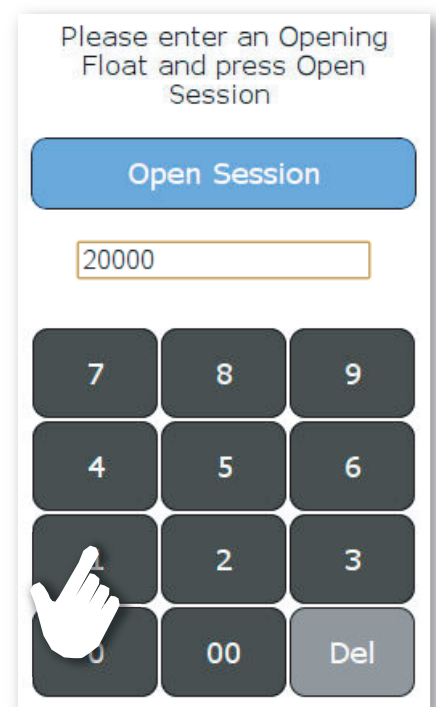
Step 1:

Using the keypad, enter the opening float in pence. E.g. a £100 float would be 10,000 pence.



Step 2:

When you're done, press **Open Session**. The till will then enter the trading screen.



Scanning Products

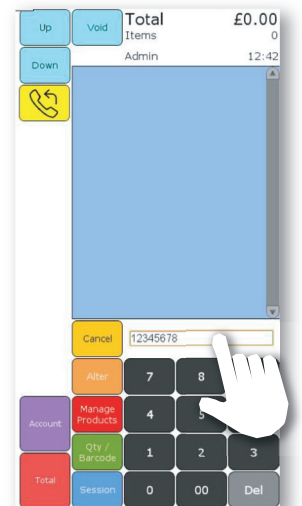
Step 1:

Scan items using the barcode scanner or key in the product number.



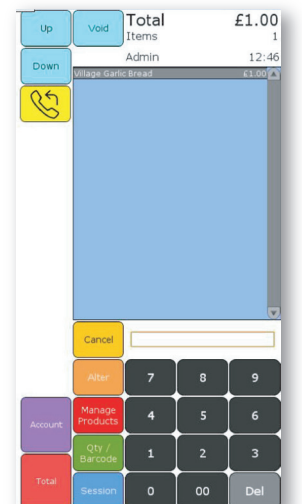
Step 2:

If you have keyed in the product number, press **Qty / Barcode**.



Step 3:

If the barcode is valid, the product will appear as a new line in the transaction. You can now scan or key-in a new product.



Using Hotkeys

For processing items without barcodes, you can use the 'General Miscellaneous (Gen Misc)' and 'Fruit & Veg (Fruit Veg)' buttons.

Step 1:

Using the keypad, enter the price of the item in pence.



Step 2:

Press the desired hotkey, to add this product to your transaction.



Cash Payments

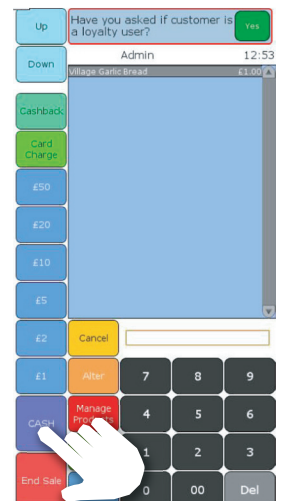
Step 1:

When all items are scanned or entered, press the **TOTAL** button.



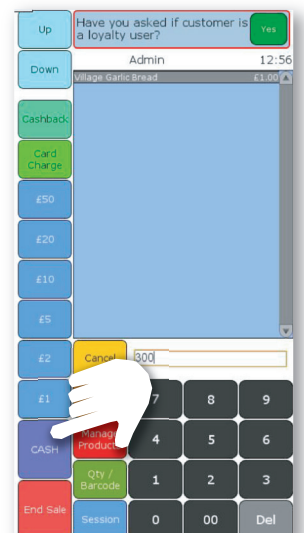
Step 2:

If the customer has given you exact change, you can press **CASH** twice and the transaction will cash out and the till drawer will open.



Step 3:

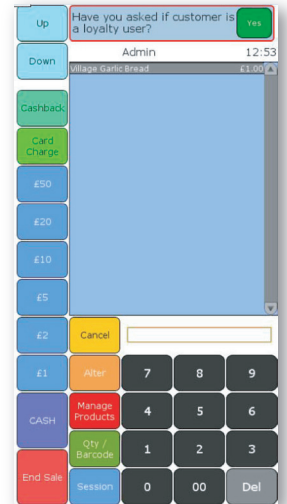
If the customer does not give you the exact amount, enter the amount given in pence on the key pad and press **CASH** once.



Quick Cash Buttons

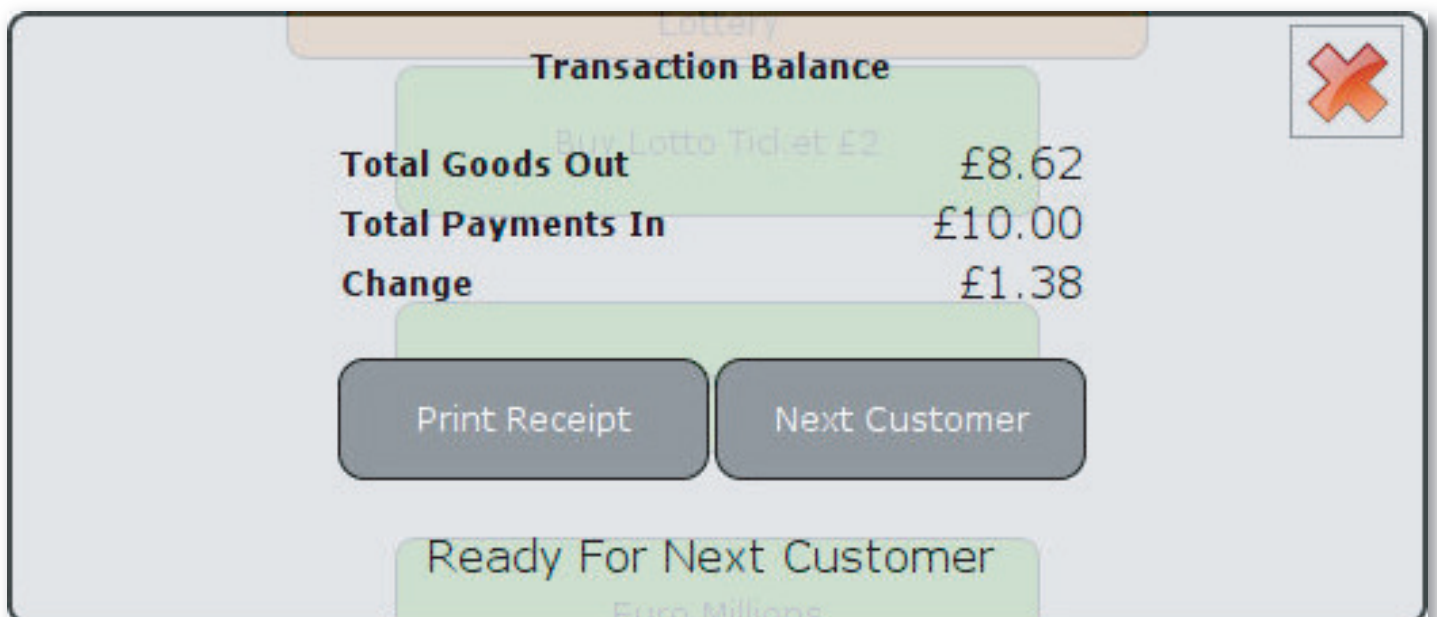
Step 1:

To speed things up, quick cash buttons are available in the Total menu. Just press the cash amount you are given.



Step 2:

The till drawer will open and the transaction balance menu will appear with the amount of change required.



Integrated Chip & Pin

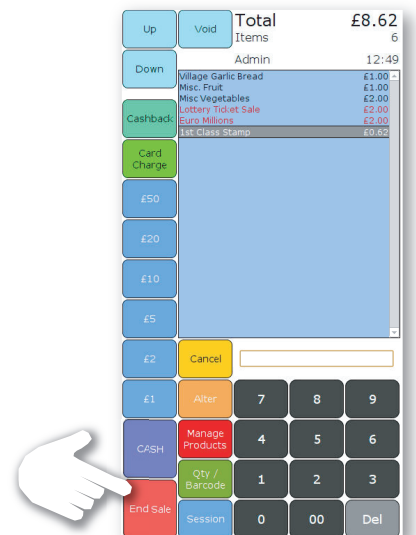
Step 1:

When all items are scanned or entered, press the **TOTAL** button.




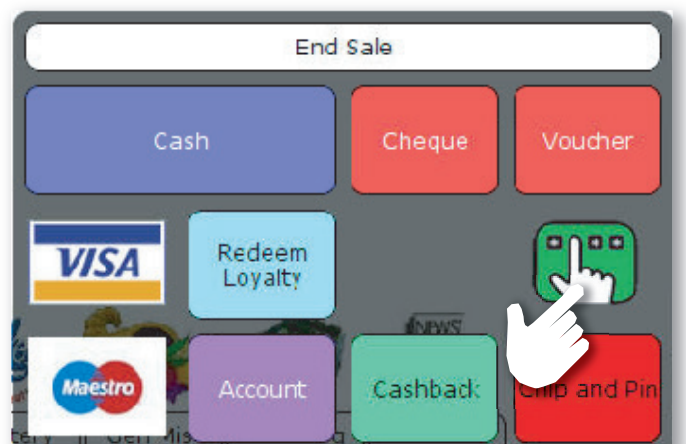
Step 2:

Press **End Sale**, which will bring up the payments options menu.



Step 3:

In this menu, press the  button twice. Payment options for your provider will now appear.



Non-Integrated Chip & Pin

Step 1:

When all items are scanned or entered, press the **TOTAL** button.



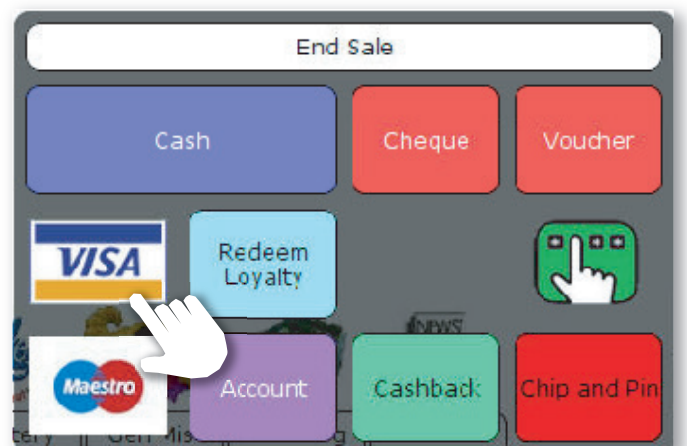
Step 2:

Press **End Sale**, which will bring up the payments options menu.



Step 3:

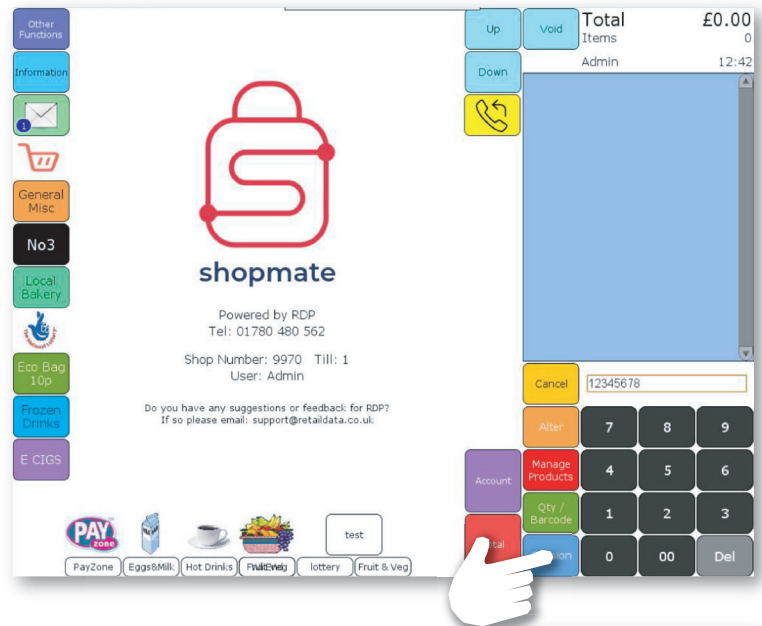
In this menu, press the icon for the relevant card type e.g. **VISA**. You can now use your terminal normally.



Cashing Up

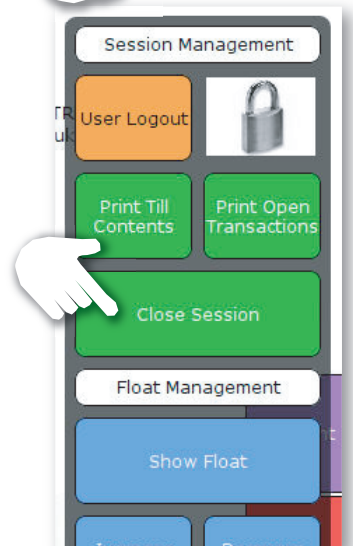
Step 1:

To end the session, press **Session**. If you leave a session open for too long, you will be asked by ShopMate to close your session.



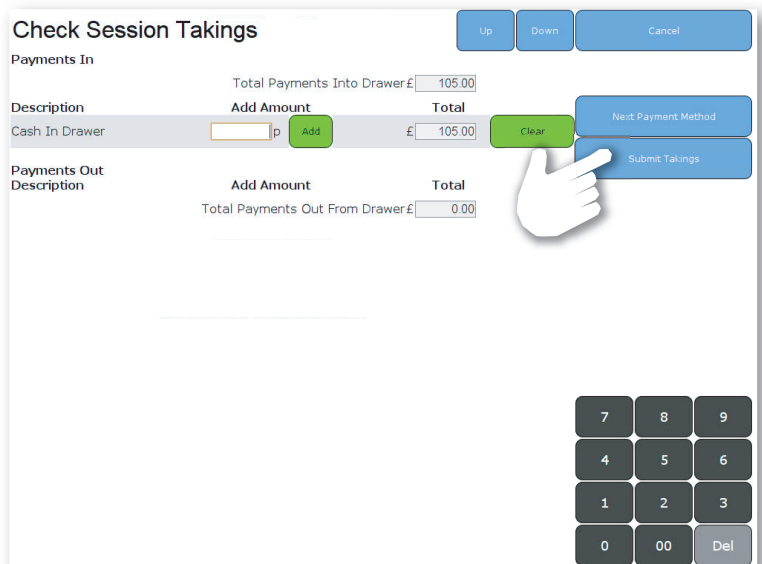
Step 2:

Then press **Close Session**. When asked if you're sure, press Yes.



Step 3:

Once you've counted the cash in the till, enter it into the Check Session Takings menu. Then press **Submit Takings**.



Your Z-Reading

Step 1:

Your till will automatically print a Z-Reading after your Session has closed.

This report will give you a complete breakdown of your session including details of takings, payment types, commissions, basic category sales and more.

If you wish to dive deeper into your data, then a suite of reports is available on ShopMate or you can visit our online reporting portal at portal.shopmate.co.uk.

Session Report	
Your New Store	
Till No.: 3	
Session ID: 1788	
Session Start:	Mon 30th May 13:33 BST
Session End/Now:	Mon 30th May 19:40 BST
Payments in:	
Cash taken	£943.23
8 Voucher	£9.27
57 Card Payments	£786.07
Total Session Takings	£1738.57
Payments out:	
1 Refund	-£0.25
15 Cashback	-£340.00
Total Session Payouts	-£340.25
TOTAL CASH (in drawer)	
	£602.98
TOTAL (in drawer)	
	£1398.32
Total Session Movement	
	£1398.32
Miscellaneous	
2 No Sale	
10 Void	£7.00
9 Cancel transaction	£25.89
2 Discounts given	£0.70
255 Trade Transactions	
Average Spend	£5.48
Takings Breakdown	
Non-VATable Takings	£494.55
Takings @ 5.00%	£0.89
Net Takings @ 5.00%	£0.85
VAT @ 5.00%	£0.04
Takings @ 20.00%	£902.88
Net Takings @ 20.00%	£752.40
VAT @ 20.00%	£150.48
Commission Breakdown	
Paypoint	£275.00
Commission Total	£275.00
Category Breakdown	
Alcohol	£216.14
Cards	£1.09
Chiller	£88.83
Confectionery	£103.91
Drinks	£166.52
Electronic Goods	£2.98
Frozen	£35.55
Groceries	£89.96
Household	£44.25
Miscellaneous	£85.55

Price Changes

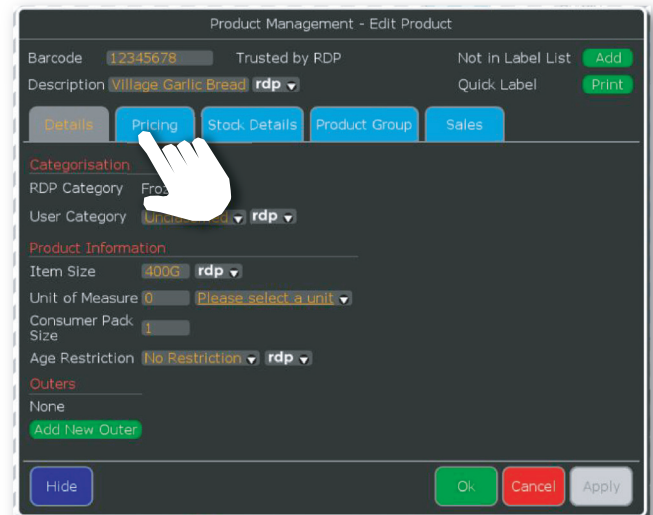
Step 1:

Press the **Manage Products** button. Then scan an item.



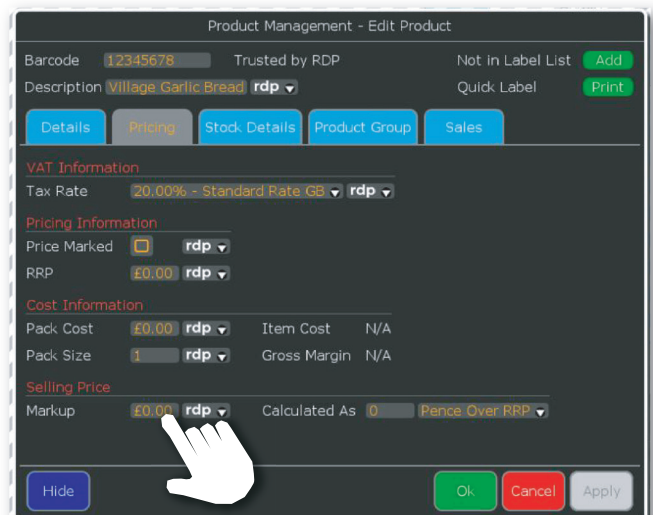
Step 2:

On the product management screen, select **Pricing**.



Step 3:

To alter the price, select the markup price and change it. Then press **OK**.



Product Management

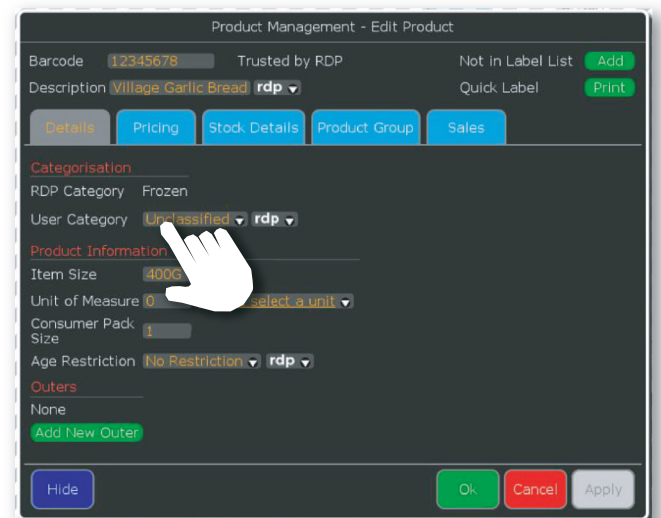
Step 1:

Press the **Manage Products** button. Then scan an item.



Step 2:

The product management window will automatically open the **Details** tab. Here you can update the product category, pack details and set whether ShopMate should require age verification before sale of this product.



When you have completed your changes, press **OK** or **Apply**.

Promotions Interface

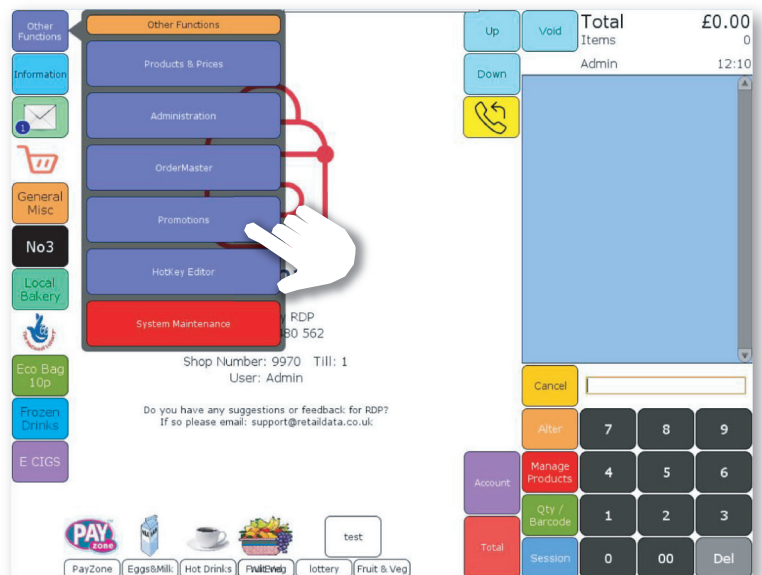
Step 1:

Press the **Other Functions** button



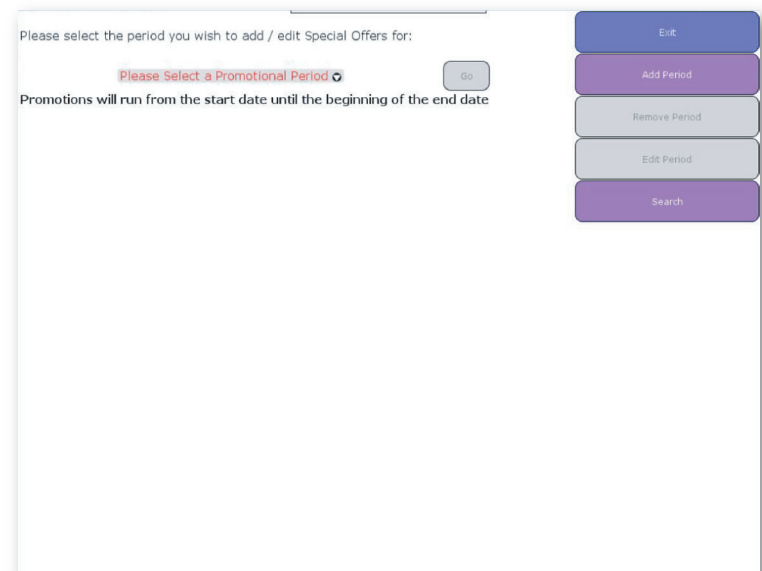
Step 2:

In the new menu that appears, press **Promotions**.



Step 3:

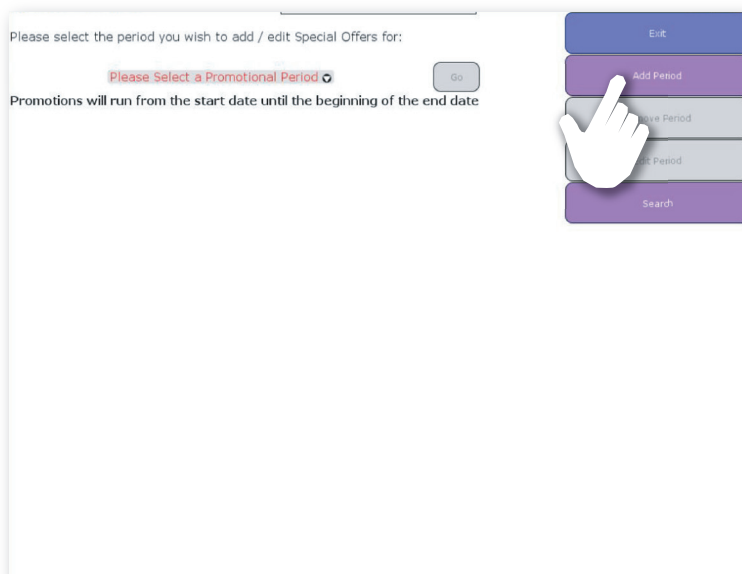
This will open the Promotions Interface. Here you can add, modify and remove any of your wholesaler or custom promotions.



Promotion Periods

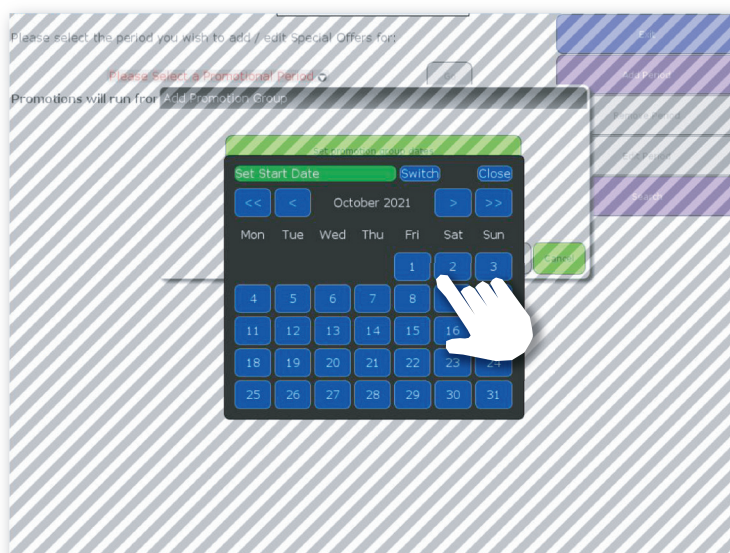
Step 1:

In the Promotions Interface, you'll see a list of promotion periods. You can select one or press **Add Period** to create a new one.



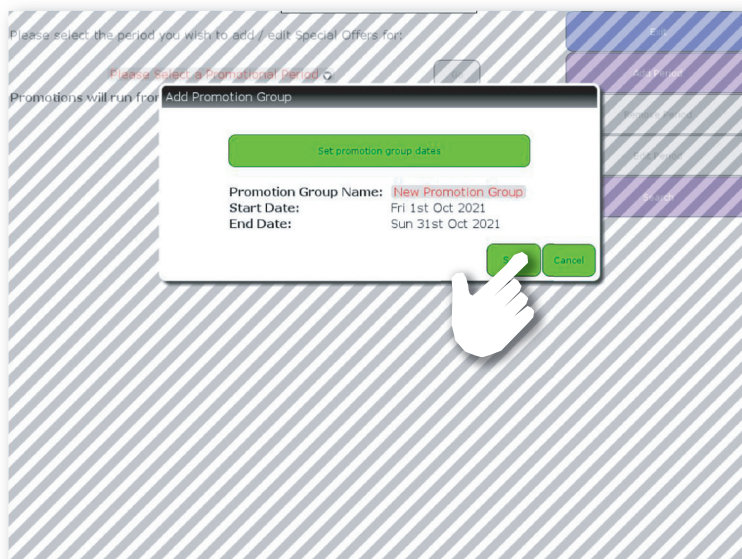
Step 2:

In the Add Promotion Group menu, set the period dates and name your new group.



Step 3:

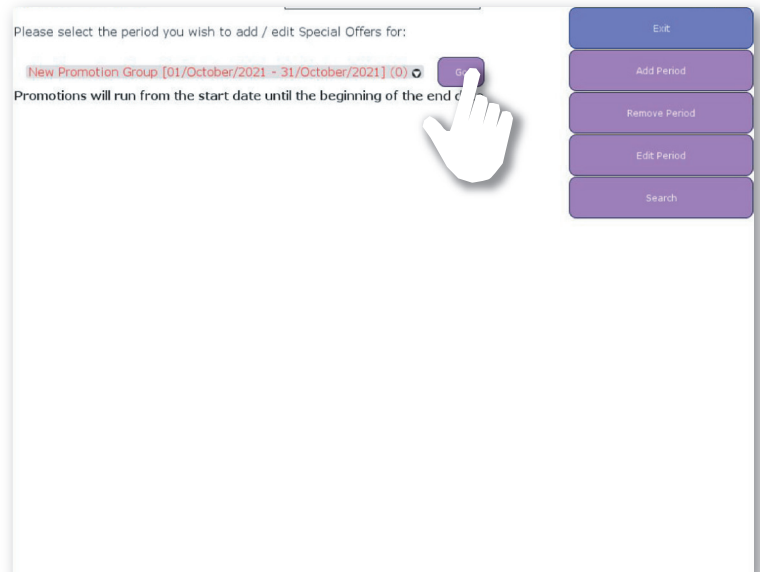
When you are done, press **Save**. You will see your new promotion period in the drop down list at the center of the interface.



Adding Promotions

Step 1:

In the Promotions Interface. Select a promotion period and click **Go**.



Please select the period you wish to add / edit Special Offers for:

New Promotion Group [01/October/2021 - 31/October/2021] (0)

Promotions will run from the start date until the beginning of the end date

Go

Exit
Add Period
Remove Period
Edit Period
Search

Step 2:

Next, press **Add Promotion**.



Promotions Editor

Change Period Exit

Promotions for Period: Fri 1st Oct 2021 - Sun 31st Oct 2021

Select	No.	Promotion ID	Description	Promotion Type
No Promotions currently exist for this period.				

Add Promotion
Edit Promotion
Remove Promotions
Print All Promotion Labels
Copy Promotions

Step 3:

Complete the promotion details. When you're done, press **Save**. This promotion will be applied from now on.



Add New Promotion

Back Exit

Promotions for Period: Fri 1st Oct 2021 - Sun 31st Oct 2021

Promotion ID: 6850019970

Promotion Type: Buy One Get One Free

Description: Garlic Bread

Buy Group 1 Barcode And get the Least Expensive Item Free

Only for Loyalty

Save

Group 1 Products

12345678	Village Garlic Bread
----------	----------------------

Remove Product

Modifying Promotions

Step 1:

In the promotion period menu, select the promotion you wish to modify and press **Edit Promotion**.

The screenshot shows the 'Promotions Editor' window. At the top, there are buttons for 'Change Period' and 'Exit'. Below the title bar, it says 'Promotions for Period: Fri 1st Oct 2021 - Sun 31st Oct 2021'. A table lists promotions with columns: Select, No., Promotion ID, Description, and Promotion Type. One promotion is selected: No. 1, ID 6870019970, Description 'Garlic Bread BOGOF(Unlocked)', and Type 'Buy One Get One Free'. To the right of the table is a vertical list of buttons: 'Add Promotion', 'Edit Promotion', 'Remove Promotions', 'Print All Promotion Labels', and 'Copy Promotions'.

Step 2:

Update the promotion details as you wish. If you wish to undo the changes, press **Back**.

The screenshot shows the 'Add New Promotion' form. At the top are 'Back' and 'Exit' buttons. It displays 'Promotions for Period: Fri 1st Oct 2021 - Sun 31st Oct 2021' and 'Promotion ID: 6850019970'. The form fields include: 'Promotion Type' (Buy One Get One Free), 'Description' (Garlic Bread BOGOF), 'Buy' (Group 1 Barcode), and 'And get the' (Least Expensive Item Free). There is a checkbox for 'Only for Loyalty'. A hand cursor is pointing at the 'Description' field. On the right, there is a list of 'Group 1 Products' with '12345678 Village Garlic Bread' selected. A 'Remove Product' button is at the bottom right.

Step 3:

When you're happy with your changes, press **Save**. Once again, this new promotion will be applied from now on.

This screenshot is identical to the previous one, showing the 'Add New Promotion' form. A hand cursor is now pointing at the green 'Save' button at the bottom left of the form.

Deleting Promotions

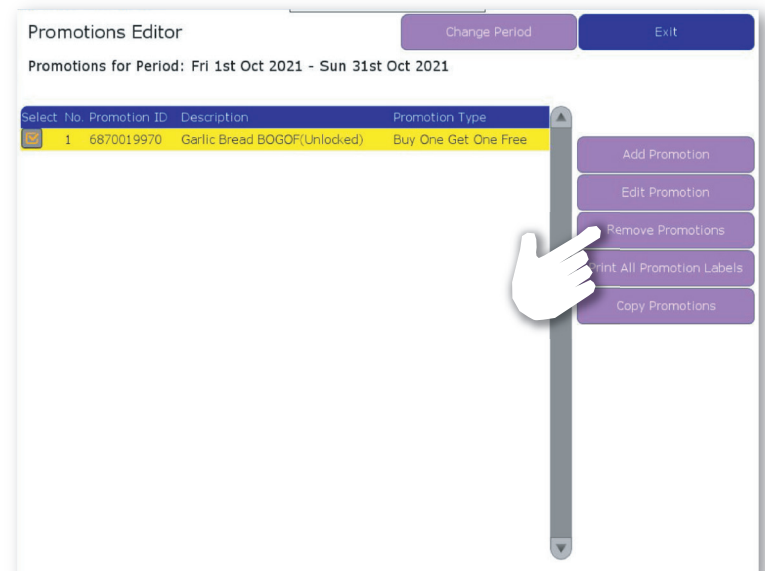
Step 1:

Press the box to the left of the promotion you wish to delete. A small tick will appear.



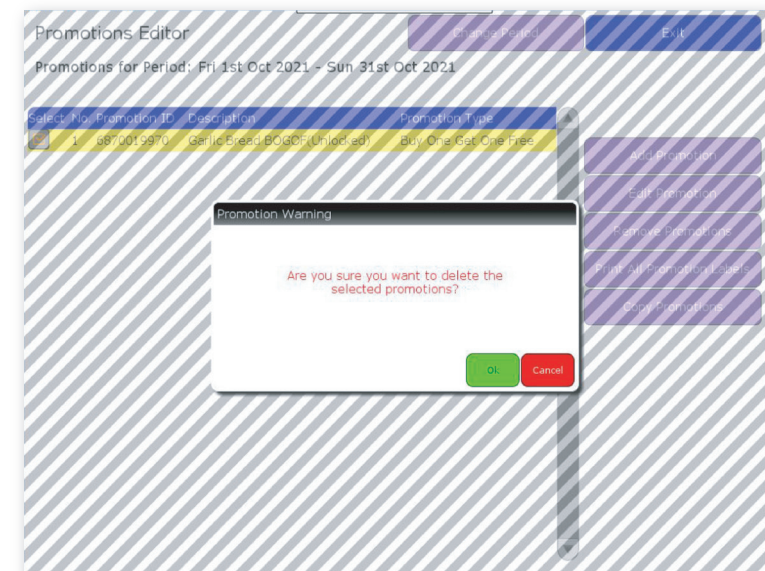
Step 2:

Press **Remove Promotions**. This will appear greyed out and not work if you do not have any promotions selected.

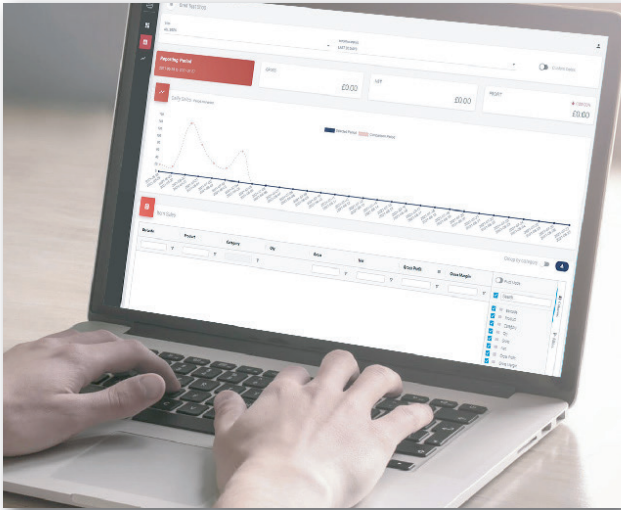


Step 3:

ShopMate will confirm that you wish to delete the selected promotion, press **OK** to confirm deletion.



Our Latest Innovations



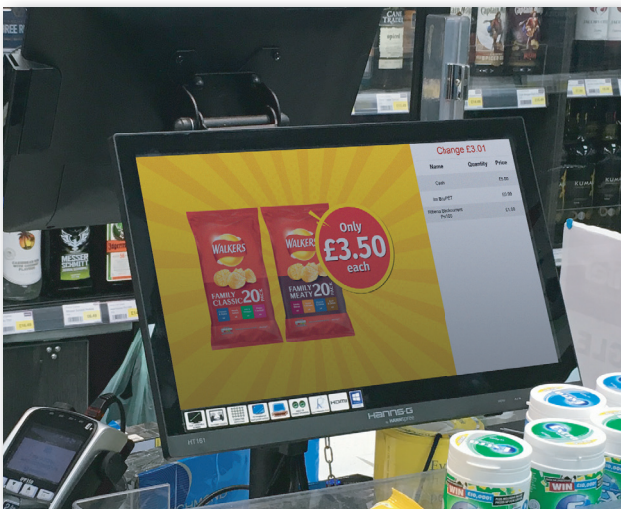
Online Management Portal

Understand your business better from anywhere, with our online reporting portal. Track sales, trends and more at any time with our easy to use platform.



Basket

Become a Brick & Click business today with Basket. Offer home delivery or click & collect to your customers seamlessly with ShopMate integration.



MediaMaster

Drive engagement and boost promotional sales with our MediaMaster ad screens. Run wholesaler/brand ads as well as your own for just £2 per week.

Visit www.shopmate.co.uk today to find out about our wide range of value added services!



shopmate

rdp retail data partnership

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Web: www.shopmate.co.uk

Email: support@retaildata.co.uk