

The Retail Data Partnership Ltd

ShopMate Operating Manual

Version 6.8.3

Telephone No.

01780 480562

Please Note: Your ShopMate Epos system must always be shut down properly. Switching off rather than shutting down through the menu system could damage the hard disk in the computer and would not allow time to save data properly.

This manual lists all ShopMate functions, but not all systems have all functions.

Do not switch off your ShopMate system unless directed to by Technical Support

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I. Introduction

Congratulations on your selection of ShopMate for your outlet. By investing in ShopMate, you have taken a vital step to improving the management and control of your store. You have also invested in state of the art hardware at the point of sale. By working with The Retail Data Partnership Ltd (TRDP), you have taken a decision not just to buy some hardware and software, but to buy a **service** from us. Our objective in developing ShopMate has been to take the work out of Epos. [delete repetitive sentence.] We hope that you will be happy with ShopMate, and that the service will deliver significant benefits to you.

You can expect these kinds of benefits:

- You will be confident of selling all products at the correct price – whoever is at the till.
- You can easily review the gross margins you are making on each product line.
- You can take as much or as little time as you wish over the management of prices. We get weekly price updates from major wholesalers, so you don't have to monitor every price in your shop.
- Easily identify slow-moving lines. You can then decide about the amount of space that you want to give them.
- Quickly find out which lines need re-ordering.
- Identify stock discrepancies, which will enable you to target shop-lifting 'hotspots' in your store.
- Improve your cash flow. You won't carry excessive stock, because your system helps you to identify ordering needs.
- All the data you need for reporting on outward VAT.
- All these should measure up to an improvement in profit of between at least 2 – 4 %.

ShopMate will help you to manage your outlet more easily and more profitably – and if you have any questions or difficulties, we have a helpline open throughout normal business hours.

2. How to Start

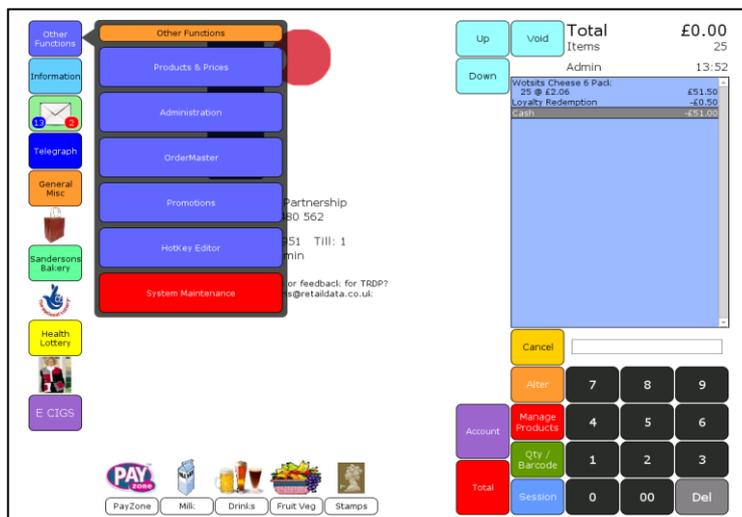
The hardware you have had installed in your shop comprises:

- Toshiba A10/20 touch screen till unit or equivalent.
- Receipt printer,
- Customer display,
- Scanner (whichever scanner you have selected)
- Cash drawer,
- Uninterrupted Power Supply (Battery if you have chosen one.)
- Laser Printer
- Hand held scanner (if you have chosen to have one)
- Back office PC (if you have chosen to have one.)
- Chip and pin unit (if you have chosen one.)

Each serving station is powered by a single normal power socket. (Some scanners require their own power supply which increases the number of sockets to two.) As part of the initial installation, TRDP has supplied a 'surge protection' adaptor (the UPS battery). This protects the hardware from sudden and damaging 'spikes' in the power supply. We cannot guarantee that the UPS will protect the hardware against all power surges, but it is important that the adaptor is always in place between the till system and the mains socket.

When the power button is pressed it will take a few minutes for the whole system to 'power up'. As the software loads itself, you will see a number of different (largely incomprehensible) screens scrolling through. The Retail Data Partnership Logo will appear on the screen before the ShopMate program begins to load.

2.1 Switching ON & OFF.



A most important feature of ShopMate is that we are able to communicate with ShopMate in your shop to update product / price files, to upgrade software, and to rectify problems. We do this remotely, and we generally do it when the shop is closed. **However, we can only do it whilst the system is switched on! So, it is important to leave the system switched on all the time.** Leaving it switched on does not cause any damage to the hardware, and, because the Till uses the latest technology, it uses very little power – much less than a refrigerator, for example. Do not switch off the power. If you need to shut the till down,, when asked to do so by a member of our Customer Support team, select

Other Functions then **System Maintenance**, followed by **Shutdown**. ShopMate now prompts you with the question **Are you sure you want to Shutdown?** You can select **Yes** or **No**. If you select **Yes**, ShopMate will go through the process of shutting itself down properly. This will take about 20 – 30 seconds. **Please note – we do not recommend that you perform the shutdown procedure unless prompted to do so by our Help desk. In the normal operation of the system, there should be no need to shutdown ShopMate.**

2.2 Connection to TRDP.

This is by a broadband connection in your shop. This should be in place before we install the system so that the engineer can set our system to communicate with our servers using your broadband connection.

Information Hot Key

This is on the front screen of the till and gives technical information about the system and the environment in which it operates. For example, if you are looking at the back office computer, you will be able to see if it is connected to the till, the router and the internet.

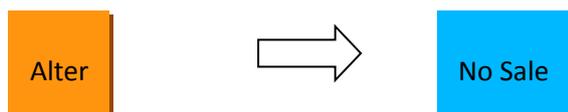
2.3 Receipt paper

The system does not use much paper in the course of normal trading. Most good stationery shops can supply this paper (You need to ask for 80mm thermal till rolls.) or you can order them from Mr Smyth, Talpa Office Products, 2nd Floor, 5 Princes Road, Shepton Mallet, Somerset BA4 5HL Telephone 01749 330683 email philip.smyth@talpaoffice.co.uk

3. Using a touch-screen control system

If you have never used a system controlled by touching a screen, this section describes how a touch-screen works. You may be used to controlling a PC by using a keyboard or a mouse, and clicking with the mouse where you want something to happen.

ShopMate works a bit like this, but, instead of using a mouse, you use your finger. For example, if you want to cause the cash drawer to open without processing a transaction, tap the **Alter** key then the **No Sale** key with your finger. The cash drawer opens.



The screen 'thinks' like a normal computer screen when a mouse is used. Your finger-press is like the click of the mouse. So, if you don't tap the key on the touch screen, but press it for a long time instead, the screen thinks you are trying to 'drag' the key rather than 'click' it. You need to get into the habit of tapping the screen quite gently, not pressing it.

3.1 Looking after your screen.

The touch screen is designed for hard use, and will cope with many years of normal wear and tear. There are, however, some things that you should avoid. Do not use hard, sharp implements, such as pens or pencils to activate the screen. The best thing to use is your finger. Avoid using long, hard, fingernails on the screen. If the screen becomes dirty, wipe it clean with a clean, damp cloth. Dry the screen after cleaning.

4. Managing Sessions on ShopMate

The screenshot shows the ShopMate interface for opening a session. At the top right, there is a blue 'Logout' button and the text 'Current User: Admin_()'. Below this, a message reads 'Please type the Session Opening Float, and then press the Open Session button'. There is a text input field for the float value, followed by a blue 'Open Session' button. At the bottom, there is a numeric keypad with buttons for digits 0-9, '00', and 'Del'.

ShopMate is designed to allow you to operate different staff shifts, each of whom runs their own session. You don't *have* to operate a strict shift system, but ShopMate will allow you to do so if you wish. To run a new session for each member of staff, follow the instructions below.

The first time you use ShopMate, and the programme loads, it will stop on a largely blank screen with instructions on how to start a new session. The screen display prompts you to key in the amount of float you have in the cash drawer, using the keypad, then select

Open Session, which is just above the keypad. NOTE: If you make a mistake in keying in a value using the keypad, you can delete the last digit entered by pressing the **Delete** button at the bottom of the keypad.

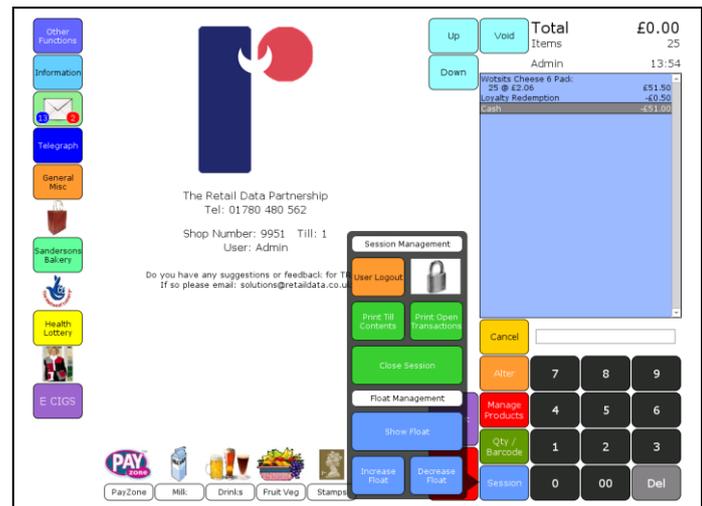
The system will begin a new session. The screen will display the normal trading layout. You are now ready to trade. If you are already in a ShopMate session, and want to close it and start another, select **Session** for the **Session** menu to be displayed. From this menu, select **Close Session**. Once you have closed your first session, you can then begin a new session as above.

4.1 Managing the float

To start trading on ShopMate, enter an amount for the float, then select **Open Session**. To see the float amount, touch **Sessions**, then **Show Float**. The float is displayed linked to the session button.

4.1.1 Increasing the float

During the session, you might need to increase the float. If so, select **Session**. The Session management menu is displayed: To increase the float, use the yellow keypad on the screen to key in the amount you wish to put into the cash drawer. You must do this **before** you select **Increase Float**. When you select **Increase Float** the transaction is complete. A full record is kept of all such transactions on ShopMate.



4.1.2 Reducing the float

Go to the **Session** menu as above. Use the keypad to enter the amount of money you are removing from the cash drawer, and then touch **Reduce Float**.

ShopMate keeps a record of all transactions of this nature, so you have a full audit trail of money removed from the cash drawer using this function.

4.1.3 End Session Report

To end a session, touch the **Close Session** button on the screen. You will be prompted by a message that asks whether you really want to end the session. Touch **Yes**. The screen changes to show a range of data entry boxes. The user needs to count the contents of the cash drawer into categories such as Cash, Cheques, Vouchers etc. The screen will display the correct boxes according to the types of payment received during the session, because the system records whether you have taken cheques, or credit card payments etc.

Check Session Takings			Up	Down	Cancel
Payments In					
Description	Add Amount	Total			
Cash In Drawer	<input type="text"/> Add	<input type="text"/> 0 Clear	Next Payment Method Submit Takings		
Visa Debit	<input type="text"/> Add	<input type="text"/> 0 Clear			
Total Payments Into Drawer		<input type="text"/> 0			
Payments Out					
Description	Add Amount	Total			
Lottery Payout	<input type="text"/> Add	<input type="text"/> 0 Clear			
Lottery Instant Payout	<input type="text"/> Add	<input type="text"/> 0 Clear			
Euro Millions Payout	<input type="text"/> Add	<input type="text"/> 0 Clear			
Total Payments Out From Drawer		<input type="text"/> 0			
			7	8	9
			4	5	6
			1	2	3
			0	00	Del

Enter the amount counted in the cash drawer into the relevant boxes on the left of the screen. Then touch [Add](#). The amount entered will be shown in the right-hand box. If you have entered an amount of cash, and added it, then you discover some more cash, just enter it into the left hand box, and touch [Add](#). It will add the new amount to the

Till	Session Start	Session End	Float
Pick 1	Wed 23rd Dec 11:53	Wed 23rd Dec 11:54	£100.00
Pick 1	Wed 23rd Dec 11:47	Wed 23rd Dec 11:53	£0.00
Pick 1	Wed 16th Dec 10:31	Wed 23rd Dec 11:46	£0.00

amount already there to display the correct total. The screen will also prompt you to enter any payments made *from* the till, such as winning lottery ticket payouts, or supplier payouts

When you have entered the contents of the drawer into each box on the left, touch the blue [Submit Takings](#) button. This will generate two separate reports from the receipt printer. NOTE: If you do NOT want the user to have to enter details of takings, then you can simply press the [Submit Takings](#) button, and the two reports will be generated.

The first short report shows how much the till calculates should be in the drawer, and compares it with how much has been entered by the user, showing any 'overs' or 'unders'. The second report gives a summary of transactions completed during the session, breaking down takings into sections such as cash, cheques, the various credit / debit cards etc. Total takings are broken down into VAT and Non-VAT sales at each level. It also shows any refunds or discounts given and any 'No Sales' and 'Cancelled Transactions'.

The End Session reports that are run during any trading day should reconcile with the 'Financial Summary' report described in the Reports Section of this document. If, for any reason, you need to review or re-print a session report, you can find past session reports on your system by touching [Other Functions](#), then [Administration](#) then [Reports](#). Select [Session Reports](#). You can select the report you need by touching the green [Pick](#) button to the left of the one you want. It can be printed off the Receipt Printer as with a normal session report.

Session Report Analysis

Comments in brackets are not normally seen on a Session Report.

Session Report
The Retail Data Partnership Ltd.
(Shop Name.)

Till No.: 2
Session ID: 685
(Which till the report is from and the session identification.)

Session Start: Wed 17th Oct 21:42 BST
Session End/Now: Thu 18th Oct 21:24 BST
(Time and date session started and ended.)

Payments in:
Cash taken £590.74
2 Voucher £6.20
2 Visa Credit £32.79
3 Card Payment £56.37
10 Visa Debit £131.65
Total Session Takings £817.75
(These are the ways funds have entered your till.)

Payments out:
2 Lottery Payout -£16.30
7 Lottery Instant Payout -£52.00
1 Supplier Payout -£47.19
2 Miscellaneous Payout -£1.54
5 Cashback -£75.00
Total Session Payouts -£192.03
(These are the ways funds have left your till.)

Float £260.78
(The amount of money you have put into the till to start your session.)

TOTAL CASH (in drawer) £659.49
(Just cash, not card transactions, vouchers etc.)

TOTAL (in drawer) £886.50
(Including all the ways funds have entered your till.)

Float -£260.78

Total Session Movement £625.72
(Total in drawer minus the float you started with.)

Miscellaneous
12 No Sale
9 Void £22.15
17 Cancel transaction £90.51
121 Trade Transactions
Average Spend £6.14

(This is a general overview of the till during the session.)

Takings Breakdown
Non-VATable Takings £442.60
Takings @ 20.00% £300.15
Net Takings @ 20.00% £250.12
VAT @ 20.00% £50.03
(A snapshot of your takings. More information is available on your Financial Summary report.)

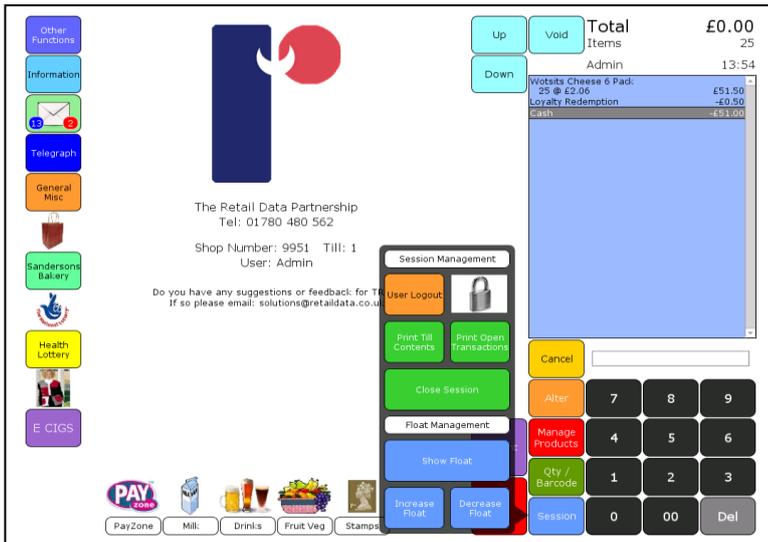
Commission Breakdown
Lottery £128.00
Paypoint £184.00
Commission Total £312.00
(Categories you receive commission on.)

Category Breakdown
Alcohol £35.75
Cards £0.60
Chiller £30.09
Confectionery £33.61
Drinks £38.22
Frozen £4.43
Groceries £57.01
Household £17.40
Lottery £128.00
Miscellaneous £18.58
News & Mags £13.03
Paypoint £184.00
Pet £5.40
Snacks £12.45
Tobacco £164.18
Total Category Sales £742.75
(Takings during the session for each category.)

Hourly Breakdown
2 2012-10-18 08:00-9:00 £7.72
9 2012-10-18 09:00-10:00 £36.19
4 2012-10-18 10:00-11:00 £20.30
7 2012-10-18 11:00-12:00 £19.95
15 2012-10-18 12:00-13:00 £144.63
4 2012-10-18 13:00-14:00 £25.69
12 2012-10-18 14:00-15:00 £88.94
15 2012-10-18 15:00-16:00 £60.73
11 2012-10-18 16:00-17:00 £83.53
3 2012-10-18 17:00-18:00 £15.77
9 2012-10-18 18:00-19:00 £72.16
13 2012-10-18 19:00-20:00 £68.54
6 2012-10-18 20:00-21:00 £31.15
11 2012-10-18 21:00-22:00 £67.45
(Footfall, Date, Time & amount taken.)

Signed:
(Signature of whoever cashed up.)

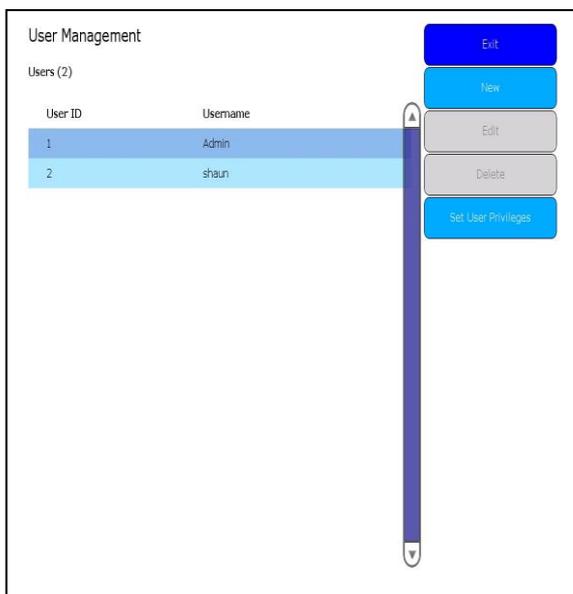
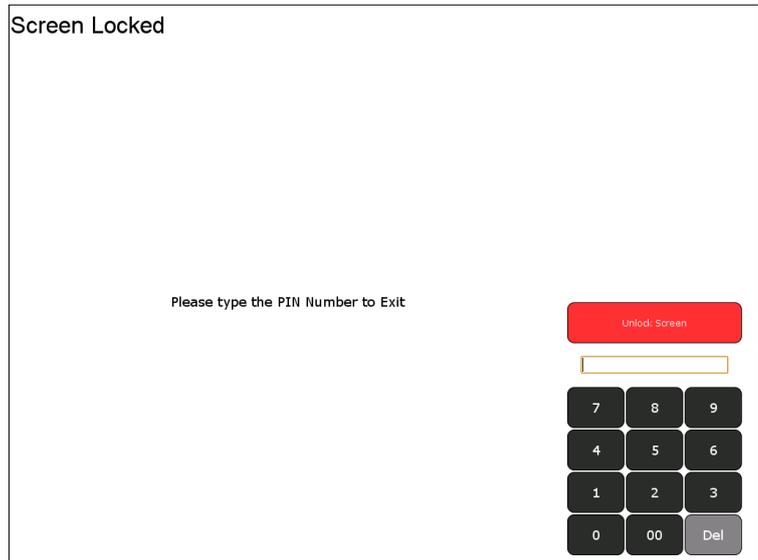
5.1 Locking the screen



If the shop is quiet, and staff want to move away from the till to stack shelves, or tidy the shop etc. you do not want a customer to enter the shop, lean over the counter, and touch the **No Sale** button to open the cash drawer.

To provide security in such instances, use the **Lock Screen** function which is in **Session**. When you touch the hotkey symbol representing a padlock, you enter the lock screen function. You are prompted to touch **YES** or **NO** at this point, and the display warns you, that if you do not know the Screen Lock PIN

you will not be allowed back into the screen once you have locked it. The screen lock PIN will *always* be the same as your ShopMate customer number. If you are not sure of your ShopMate customer number you can be reminded by touching the **Cancel** button just above the **Alter** button and to the right of the **£2** button. When you return to the till, and need to unlock the screen, enter the screen lock PIN and you will be returned to the place where you left off.



5.2 User Management

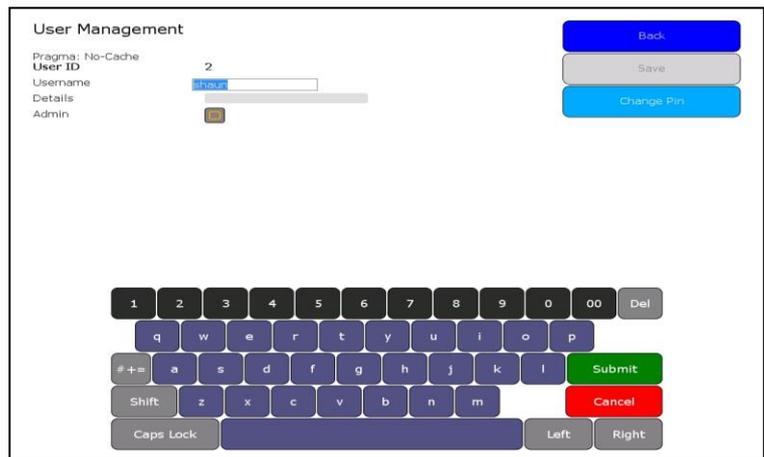
If you are logged in as Administrator (See Login below) you can manage the other users.

You will have the option of adding a new user, editing or deleting an existing user.

Select **Other Functions** then **Administration** and then **User Management**.

Your Administration pin number will be set to 6 zeros by default but you can edit the number.

To add a new user to the till, press [New](#). You will be prompted to enter a name. Press [Save](#). The new user's pin will be set to 6 zeros. You can then select [Change Pin](#) and type in a new pin number between 4 and 6 characters and press [Save](#). If you want to make a user an Administrator – on the [User Management](#) screen select the user and press [Edit](#). Next to [Admin](#) is a small box which if ticked will give a user all the privileges of an Administration user including adding new and editing existing users.



Edit User.

When you are logged in as a user you will be able to edit your pin number. Select [Other Functions](#) then [Administration](#) then [User Management](#).

Login

Select your name from the list and type in your pin number then select [Login](#).

Logout

Select [Session](#) then [Logout](#).

5.3 User Privileges

Each user can be assigned privileges which allow them to use certain functions of the till. To do this you need to be logged in as Administrator. Go to [Other Functions](#) then [Administration](#) and then [User Management](#). Select the user and press [Set User Privileges](#). Tick the boxes of the privileges you want the user to have.

Username	Account Admin	Add Product	Category Management	Change Price	Discount	Edit Product	End Session	Float Adjust	No Sa
David	<input type="checkbox"/>								

At the bottom of the screen, there is a virtual keyboard with buttons for 'Up', 'Down', 'Left', 'Right', 'Copy Privileges', and 'Exit'.

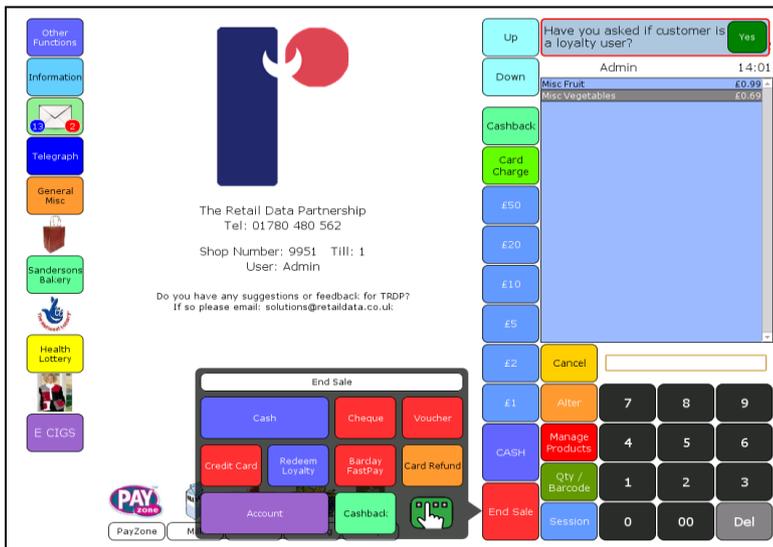
6. Processing a transaction

There are a number of ways to process a transaction. This manual will explain some of them. You need to decide which suit you best, and that you find to be quickest and easiest.

6.1 Scanning products at the point of sale

To scan a barcode at the point of sale, you need to pass the barcode in front of the scanning light-beam from the scanner on the counter. When the scanner has recorded the barcode that has been presented to it, it will 'bleep', and in some cases an indicator light on the scanner will show green or blue. The item will be added to the transaction. If you only wish to scan one unit of the product, you can now scan the next item in the transaction.

If, however, you want to record the sale of five units of a particular item, scan the barcode of one, then select the **5** key on the keypad, followed by **Qty / B'code**. This will add 5 units of that item to the transaction. Alternatively, you can key the **5** first then just scan the barcode. This will have the same effect.



6.2 Using the 'Hot Keys'

Hotkeys take their name from a former generation of tills. On older tills, it was possible to set up some of the keys to represent specific products or categories of product. They were called hotkeys. The main advantage of hotkeys is that you can record the sale of an item without a barcode, or without having to slow down a transaction by scanning it.

We have taken the hotkey idea and used it on our touchscreen. The standard touchscreen layout allows you two main levels of detail in recording sales of non-barcoded items. The two main methods are 'unpriced' hotkeys and 'priced' hotkeys. For example, if you sell phone top-ups, each customer might want to top up their phone by a different amount. So for phone top-ups we recommend that you use 'unpriced' keys. To record a phone top-up sale, you touch the phone hotkey, which displays the options shown.

Use the keypad to enter the value of the top-up that the customer wants e.g. 500 (£5.00) followed by the relevant hotkey (such as Vodafone.) The sale of the Vodafone top-up is shown on the light blue 'till-roll' section of the screen.

Another important use of hotkeys is for products that do have barcodes, but which tend to be difficult to scan, or for products where the price will stay the same throughout the day. For example, at the beginning of the day, when customers are trying to get to work in a hurry, they do not want to queue in your shop. If they have the correct change, they pick up a newspaper, put the money on the counter and run out of the shop. To record the sale of that newspaper, you select the appropriate hotkey. This will keep your cash drawer reconciled with the ShopMate system. You can adjust the prices of the priced hotkeys by pressing and holding the hotkey for a couple of seconds. This will take you to the Manage Products screen where you can change the price.

Setting the 'Hot Key' prices of newspapers

This is slightly different to setting prices of other Hot Keys and needs to be done each day for the first week so that the Hot Key can be linked to the newspaper barcode for reporting and stock purposes. There are two ways to set up your Newspaper Hotkeys.

1. Go to the newspaper [Hot Keys](#) and press one of the newspaper hot keys.

For example press  or 

The system will ask you to scan the associated newspaper. (This will link the Hot Key with the newspaper) You will need to do this each day until all the papers for each day of the week have been scanned.

NB. The newspaper will be added to the till roll to be sold and so will need to be voided if not to be sold. Alternatively do this in training mode.

2. If a newspaper price is altered then the barcode is also altered.

To set up prices or if the price of a newspaper changes go to [Other Functions](#) then [Products and Prices](#) and then [Manage Newspaper Hot Keys](#). Press [Clear Barcode](#) to clear existing barcode and then scan the newspaper.

The price set for the [Newspaper Hot Key](#) is then taken from the price file on the till.

3. To change the price of any hotkey simply press the hotkey and hold down for a couple of seconds, this will take you to the manage products screen where you can change the price.



6.2.2 Set up 'Hot Keys'

First, create a menu then add buttons to that menu, then add a button to access that menu on the main screen.

Create a menu:

Select [Menu Editor / New](#).

Type in the name of the menu and press [Submit / OK](#).

Give the menu a heading:

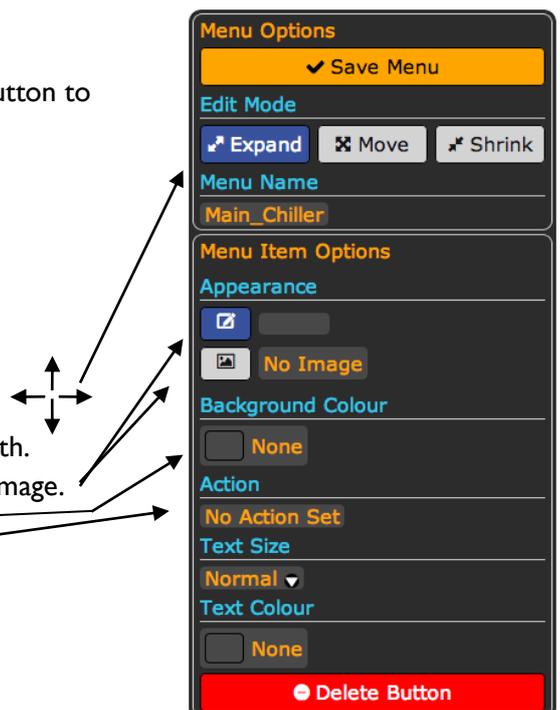
Touch the top row of the grid then select [Create Button](#).

Select [Expand](#) and use arrows to expand heading to desired length.

Select the text box and type the name of the menu or select an image.

Set background colour if required.

Leave [Action](#) set to [No Action Set](#).



Put a button in menu:

Touch the grid where you would like your first button.

Select the size of the button

(Buttons are created down and to the right of the point selected on grid)

Add text or image

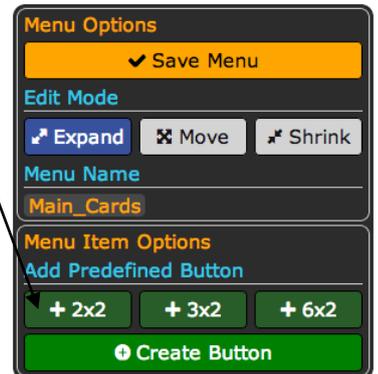
Set Action to **Add Item**

Touch **Select Product** and type the name of the product into **Product Search** and select **Priced** or **Unpriced** or **Retail**

(Priced button, unpriced button or retail barcode to link to button)

Press **Submit**

Select a product and it will show in **Currently Selected Product** at the top of the screen then press **OK** or touch the name of the product selected which is highlighted in orange. This will move you into **Product Management** where detail and price, etc can be adjusted.



If no appropriate product is found select **New** **Go to Add New Product**

Press "OK" twice then



Then



Add New Product

After pressing the



You will then be moved into **Product Management**

Barcode and **Description** will be added automatically

Top Category Using the drop down box select an appropriate category from the list.

Sub Category Using the drop down box select an appropriate category.

VAT Information Using the drop down box, select the appropriate rate of VAT. Any mistakes will be rectified by The Retail Data Partnership Ltd.

Selling Price Select the **Mark Up** box and add the price in pence

Press **Submit** then **OK**

Press **OK** twice then



Then



Create a button on the front screen to link to your new menu:

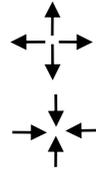
Select either **Hot Keys Left** or **Hot Keys Bottom** (Depending on space) from the Menu List.

Touch the grid where you want the button to be.

Select the size of the button.

(If there is no room for the button it will not be made.)

Select **Expand** to increase the size of the button using the arrows.
 Select **Move** to move the button.
 Select **Shrink** to decrease the size of the button using the arrows.



Working down the screen

Appearance

Select the first box to put text onto button
 Or

Select the next box to put an image onto button

Background Colour

Touch the box and select a colour

Action

Select box and select **Show Menu** from the drop down menu
 Select the next drop down box and select the menu that you have made.



6.2.3 Set up 'Hot Keys' for scales

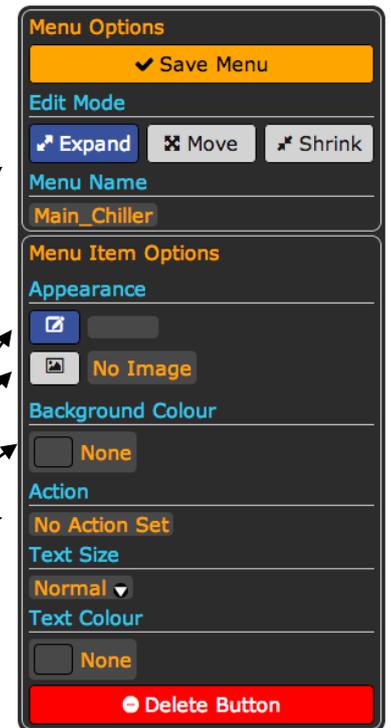
First, create a menu then add buttons to that menu, then add a button to access that menu on the main screen.

Create a menu:

Select **Menu Editor / New**.
 Enter the name of the menu and press **Submit / OK**.

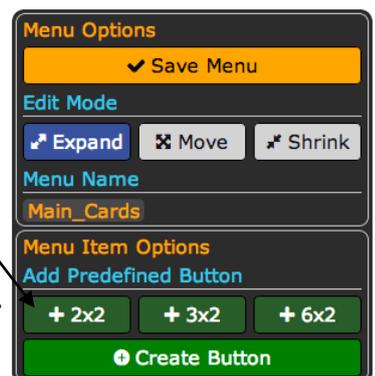
Give the menu a heading:

Touch the top row of the grid then select **Expand**
 Use arrows to expand the heading to the desired length.
 Select **text box** and type the name of the menu or select an image.
 Set background colour if required.
 Leave **Action** set to **No Action Set**



Put a button in menu:

Touch the grid where you would like your first button.
 Select the size of the button
 (Buttons are created down and to the right of point selected on grid)
 Add text or image. Set Action to **Add Weighed Item**. Touch **Select Product** and enter the product name. Press **Submit**. Select a product and it will show in **Currently Selected Product** at the top of the screen. Select **OK** or touch the name of the product selected which is highlighted in orange. This will move you into **Product Management** where detail and price, etc can be adjusted, or **New** if no appropriate product is found see **New Weighed Product**.



Press **OK** twice then



Then



New Weighed Product

If no product is found touch



You will then be moved into **Product Management**
Barcode and **Description** will be added automatically

Top Category Using the drop down box select an appropriate category from the list.

Sub Category Using the drop down box select an appropriate category from None, Non-Barcoded, PM (Price Marked).

VAT Information Using the drop down box, select the appropriate rate of VAT. Any mistakes will be rectified by The Retail Data Partnership Ltd.

Pricing Information Select the **Add Price** box.

Touch the boxes and add the price in pence and the measure in grams.

Press **Submit** then **OK**

You can now press **Apply** and **OK** or press **Add Price** to put in another price break.

Press **OK** twice then



Then



Create a button on front screen to link to your new menu:

Select either **Hot Keys Left** or **Hot Keys Bottom** (Depending on space) from the Menu List.

Touch the grid where you want the button to be.

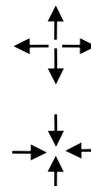
Select the size of the button.

(If there is no room for the button it will not be made.)

Select **Expand** to increase the size of the button using the arrows.

Select **Move** to move the button.

Select **Shrink** to decrease the size of the button using the arrows.



Working down the screen

Appearance

Select the first box to put text onto the button

Or

Select the next box to put an image onto the button

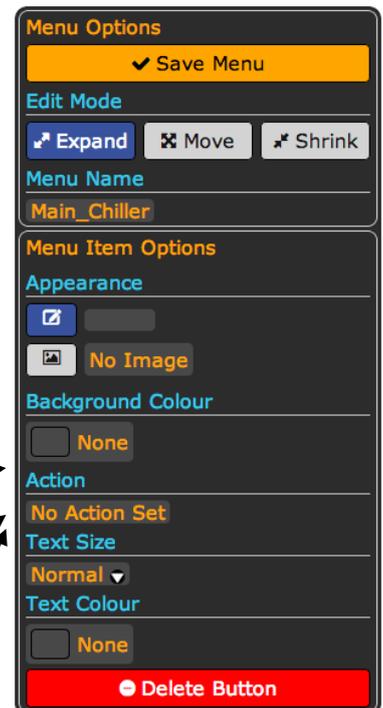
Background Colour

Touch the box and select a colour

Action

Select box and select **Show Menu** from the drop down menu

Select the next drop down box and select the menu that you have made.



Press



then



then

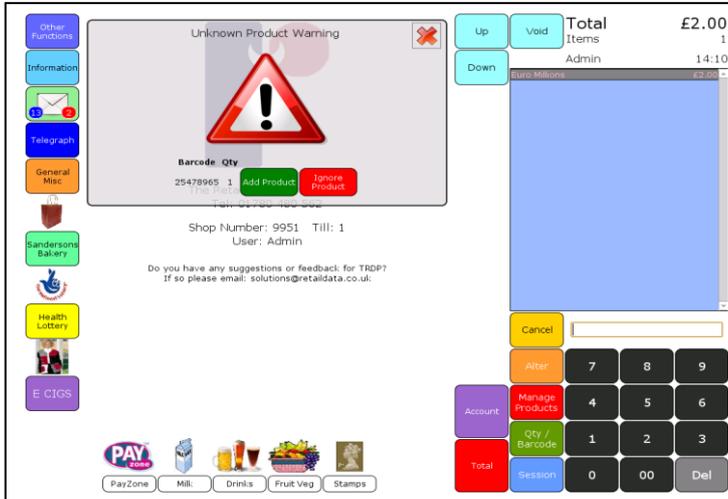


To sell a weighed product.

Place product on scales and press the appropriate 'Hot Key'

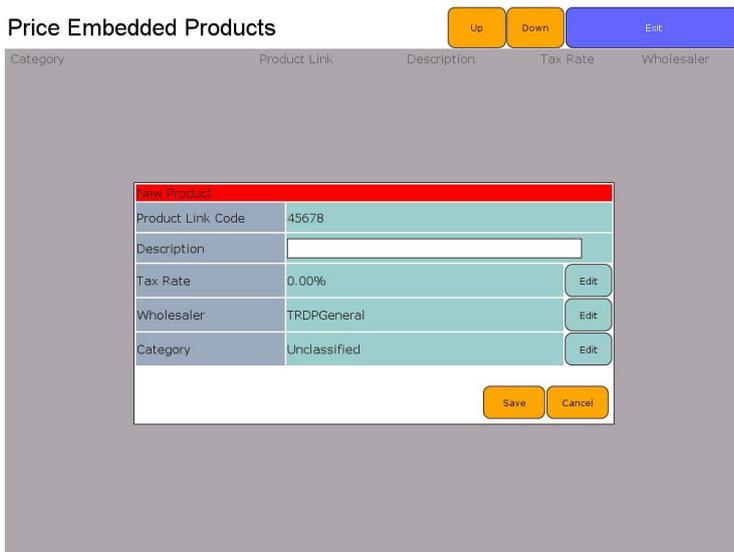
6.3 Price-embedded barcodes:

Some products have barcodes, but the barcode is different for each instance of the product. For example, pre-packed cheese, which is sold by weight, might have different pre-packed weights which also means that the prices will be different. ShopMate allows you to set up the till so that you can record the sales of these products quickly and accurately. A price-embedded barcode can be recognised easily. It will always start with either '02' or '20'. These first two digits are followed by five digits that are allocated to describe the product. You can set up your own barcodes and assign your own numbers to your products. If the barcode is on a pre-packed item, you can record the 'product description' digits and enter a description for them. This means that, every time those digits are scanned as part of a price-



embedded barcode, the system will identify the product description accurately. The next five digits contain the price of the item. So, if the five digits are 00189, then the item will sell at a price of £1.89. The last digit is a check digit for the scanner, and does not affect the description or the price.

Price Embedded Products



When a product with one of these barcodes is scanned for the first time, the **Unknown barcode** warning screen flashes. When you touch the green button to **Add Item**, a new screen is displayed, specifically for price-embedded barcodes.

As you see from the image, the system has identified the barcode as price-embedded. It has a different layout from the normal **Add New Product** screen. To add a description, touch the **Description** data entry box and an on-screen keyboard will be displayed for you to add the description. Follow the prompts to add more information, such as the VAT rate, the wholesaler from whom you bought the product, and the category in which you want its sales to be included.

Category	Product Link	Description	Tax Rate	Wholesaler
Chiller	00003	Ham	17.50%	Booker
Chiller::Kerry	00145	Cheddar cheese	17.50%	Booker
Unclassified	00002	Cheese	0.00%	TRDPGeneral

When you have completed the data entry, the system will display the details you have entered. Scanning and managing price-embedded barcodes is useful for shops that pre-bag their own products, such as pet shops. This is also useful when combined with weighing scales that produce price-embedded barcode labels.

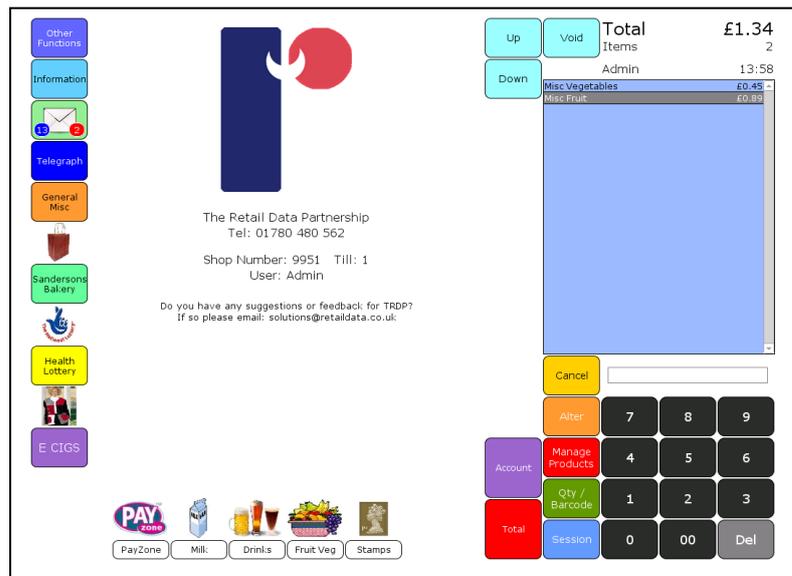
IMPORTANT: If you do NOT want to go to the trouble of managing price-embedded barcodes you can sell the products using unpriced hotkeys. This will not give you the same level of detail in your reports, depending on your hotkey layout.

6.4 Voiding an article in the transaction

If a customer changes his or her mind about an item that has been entered into a transaction, either by scanning or selecting a hotkey, it is possible to remove it from the transaction quickly and easily. The item will be displayed in the light blue 'Till-roll' area of the screen. If it is a large transaction, you may have to scroll up and down through the transaction to find the specific item. To scroll up and down through the items in the transaction, use the **Up** and **Down** keys next to the till-roll.

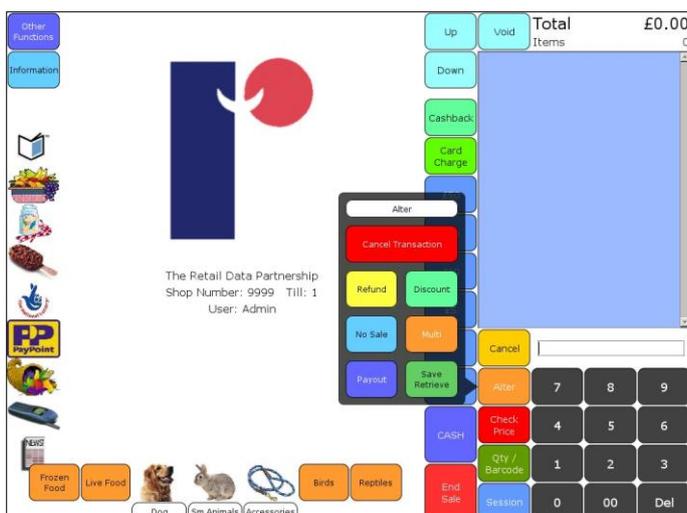
When you have identified the item to be removed from the transaction, select it by touching it.

A small black arrow will appear to the left of the product description to show that it has been selected (Stars in the image shown here.) Now press the **Void** key. The selected item will be removed from the till-roll and from the transaction.



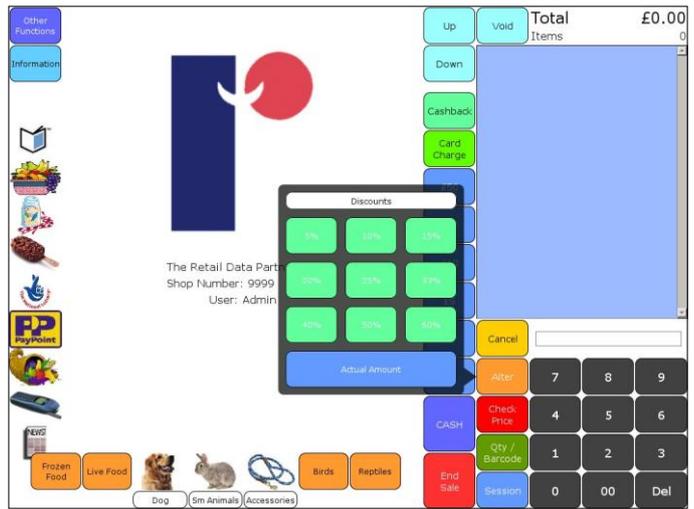
Move on to the next stage in the transaction.

6.5 Discounts



If you want to discount an item (it might be near its sell-by date or slightly damaged), enter the item into the transaction, by scanning or hotkey. Select **Alter** then the **Discount** key. The screen displays a number of different discount options. You can either discount by a percentage or an **Actual amount**. If you want to discount by one of the percentages, touch the appropriate key. The price of the last item in the transaction will change in the till roll area.

If you want to sell the product at a specific price, key in that amount on the keypad, then touch **Actual amount**. The altered price will be displayed on the till roll. Move on to the next item in the transaction or end the sale if the discounted item is the last one. If you print a receipt for the sale, the discount will be shown. All discounts will be recorded, and sub-totals are shown in the Session Reports. Details of each discount can also be found in the Alterations report in the main reporting area of the system.



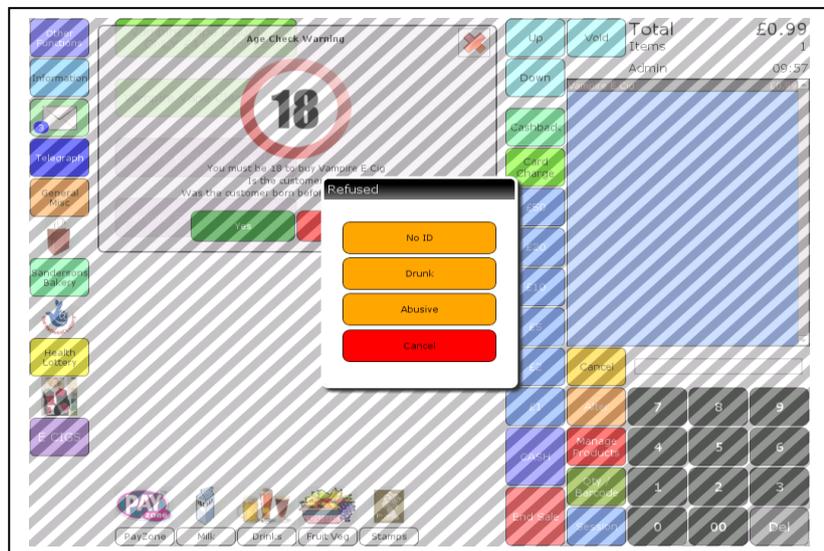
6.6 Age-restricted products

This section describes how ShopMate handles the sale of Lottery, Tobacco or Alcohol products where customers must be over 16 or 18 in order to purchase the product. When you scan a lottery, tobacco, or alcohol product, the system gives a double bleep, and a target age is displayed on the screen. Below the target age are two buttons, one green **Yes** and the other red **No**. If the customer is obviously over the required age, or can show proof of age that satisfies the till operator, press **Yes** and **Not asked** for example and continue with the transaction, by scanning the next product, or using a hotkey.

You must press Yes or No.

If the customer cannot satisfy the till operator that they are allowed to buy the product, the till operator can press the **No** button. When the **No** button is pressed, another page will open giving the operator three options **No ID, Drunk, Abusive**. When a button is pressed the transaction will be cancelled and a refusal receipt will automatically print.



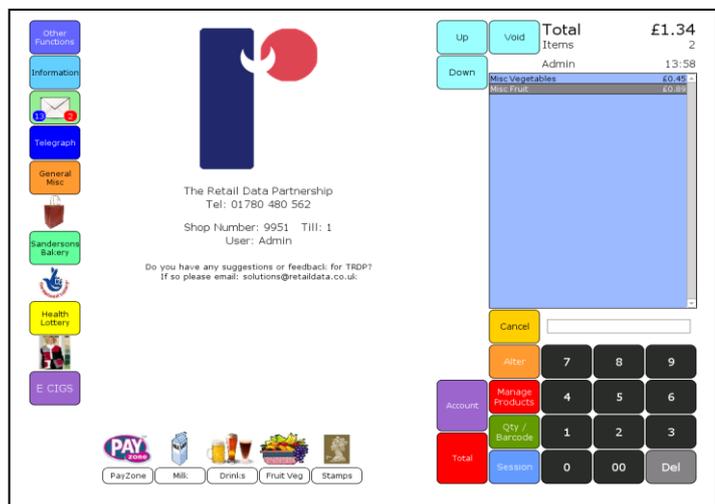


6.7 End of Sale

This section describes the different ways in which you can end a transaction. We suggest that you and your staff try some of these, and settle on one that is easiest and quickest for you.

6.7.1 Total Button

When the customer has given you all of the items they wish to buy, and they intend to pay with cash, there are a number of ways to complete the sale. The **Total** button must be pressed. If you can see the money the customer is offering - £1, £5, £10, £20 or £50 - select the appropriate fast key. The transaction total will show in the main display area, followed by the amount of cash tendered, and the change you need to give. The cash drawer will spring open.



If the customer requests a receipt, select the **Receipt** button.

To save time and paper, receipts are *not* automatically printed for each transaction. . You don't need to touch the **Next Customer** button, but you can do so if you wish to have a screen without details of the last transaction.

If you don't know how much cash is being offered, select the **Total** button and wait until they give you the money, then enter the amount, using the keypad and select **Cash**. The transaction total will show in the main display area, followed by the amount of cash tendered, and the change you need to give to the customer. The cash drawer will spring open.

If you don't know how they intend to pay, select **Total**, then **End Sale**. In the main display area several options will appear – **Cash, Cheque, Voucher**, and the logos of different debit and credit cards. You may also have the option for **Chip & PIN** or **Accounts**.

If you are offered cash, key in the amount, or select **£1, £5, £10, £20** or **£50** as appropriate, then touch **Cash**. The transaction total will display in the main display area, followed by the amount of cash tendered, and the change you need to give to the customer. The cash drawer will spring open.

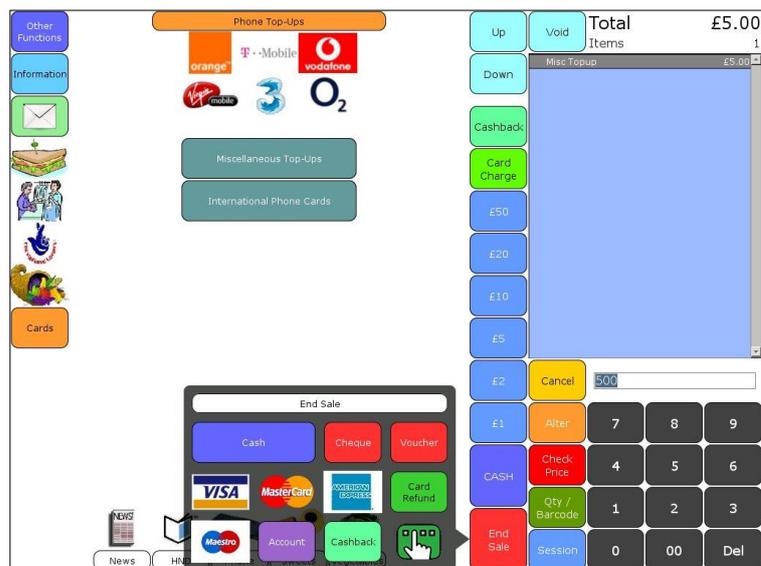
Cash transactions are recorded as cash, so that the cash drawer contents will reconcile accurately. The cash, cheque, voucher and credit card totals will be shown on the daily summary report.

6.7.2 Cheques

If a customer wishes to pay by cheque, select **Total** then **End Sale**. In the main display area you will see several options – **Cash, Cheque, Voucher**, and the logos of different debit and credit cards. If the customer is giving you a cheque for the exact amount of the transaction, touch **Cheque** twice.

The transaction total will display in the main display area, with the amount of the cheque shown beneath it.

ShopMate assumes that the cheque will be for the exact amount of the transaction total, and that no change will be given. The cash drawer will spring open.



If the customer wants to give you a cheque for more than the amount of the transaction, and get some cash back from you (assuming that you allow such transactions) then use the keypad to enter the **TOTAL AMOUNT** of the cheque then touch the **Cheque** button. ShopMate will work out and display the amount of cash you need to give the customer.

Cheque transactions are recorded as cheques, so that the cash drawer contents will reconcile exactly with the ShopMate daily summary. The total value of cheques will be shown in the daily summary report.

6.7.3 Credit / Debit cards

If a customer wishes to pay by credit card, and you have a card processing machine provided by your bank, finish entering all the items in the transaction. If you allow Cash Back and the customer wants, for example, £10, enter 1000 on the keypad and select **Cash Back**. This will add £10 to the till roll. Then select **Total** and **End Sale**. In the main display area you will see several options – **Cash, Cheque, Voucher**, and the logos of different debit and credit cards.

Select the logo of the appropriate debit / credit card. This will display the amount to be taken from the customer's card. If this is correct then pressing the logo a second time will complete the transaction. The transaction total will show in the main display area, followed by the amount of money tendered. ShopMate assumes that the debit / credit card amount is the same as the transaction total, and that no change will be given. The cash drawer will spring open.

These transactions are recorded as card transactions, so that the cash drawer contents will reconcile exactly with the ShopMate daily summary. The total value of card sales will be shown in the daily summary report.

If you have TRDP's integrated Chip & Pin processing option, select the **Total** then **End Sale** button. Select the blue **Chip & Pin** button at the bottom of the screen. The screen will prompt you through the steps of processing the transaction or offering the customer the option of **Cashback**.

If you select **Payment**, the screen prompts you to offer the customer Cashback. If they want Cashback, you are prompted to enter the amount. Once you have entered the amount, select **Payment** to proceed to the next stage. The customer then needs to insert their card into the Chip and Pin reader connected to the till. The till will have transmitted the transaction amount to the card reader. As soon as the customer has entered their PIN number, the Chip & Pin device will contact the payment clearing system to authorise the transaction. This happens quickly as it uses the shop's broadband connection, which is much quicker than a dial-up connection. Once the transaction is complete, the till will display the normal transaction screen, *with* the amount of money that you are required to give back to the customer.

6.7.4 Vouchers

Vouchers are an increasingly important means of payment. The accurate management of vouchers is critical to the cash flow and profits of the businesses that handle them.

ShopMate's end of sale process has been designed to make voucher handling easy and efficient. At any stage during the transaction, select **Total** then **End Sale**. In the main display area you will see several options – **Cash, Cheque, Voucher**, and the logos of different debit and credit cards.

Key in the value of the voucher then touch **Voucher**. If the voucher value is sufficient to pay for the transaction, the cash drawer will spring open.

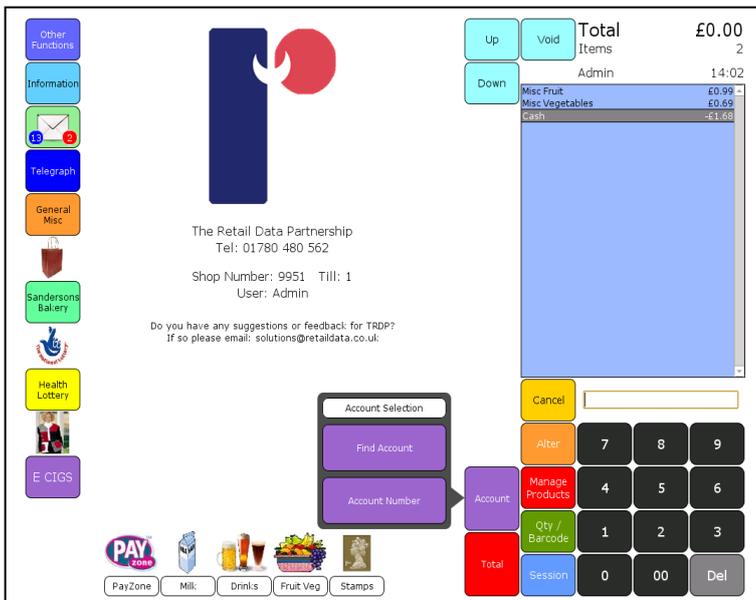
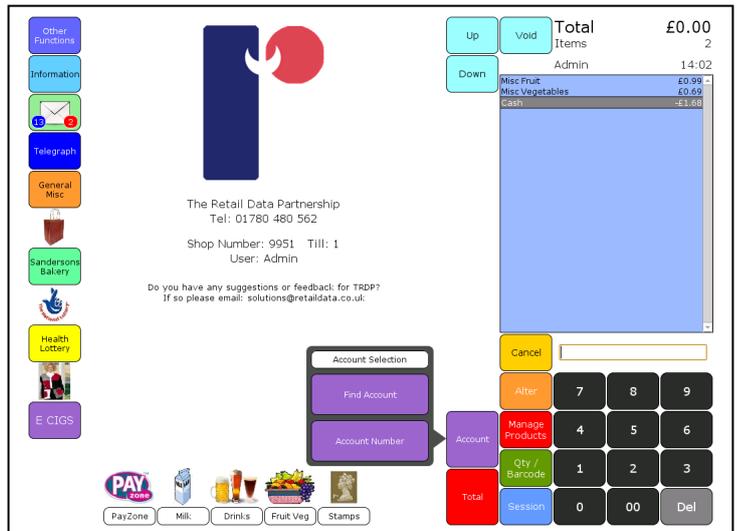


The value of the voucher will have been deducted from the transaction total that now displays in the main display area of the screen and on the customer display. You need to enter the amount of cash tendered by the customer. Select one of the **£1, £5, £10, £20 or £50** buttons, or use the keypad to enter the amount, followed by **Cash**. The voucher value will be shown on a receipt printed after the transaction.

Some vouchers have barcodes. At the moment we do not have database information for these barcodes. In future we may be able to offer the option that, after 'Voucher' has been selected, the barcode of the voucher could be scanned. This is not possible at the moment.

6.7.5 Adding to account

If you allow customers credit, the customer might ask to have the transaction added to his / her account. (See Administration Section for setting up accounts) When everything has been scanned, select the **Accounts** button. You will have the option to **Find account** or enter account number and press **Account number**. If you choose to find account you will need to enter search information such as surname. If you enter the customer's account number it will find their account straight away.



Select **Add to Account** to add the transaction total to the customer's account.

If the customer wants to pay his / her account, key in the amount they wish to pay then select **Money into account**. The amount will be subtracted from the account balance.

If the credit customer wants a mini-statement of their account, you can print it from the screen, by selecting **Print Summary**. You can move between accounts by selecting **Change account**.

6.7.6. Printing receipts

ShopMate does not print receipts automatically unless there is a payment as part of the transaction. We have set up the system in this way, because many customers do not want receipts for small transactions. Printing receipts for every transaction is wasteful. Receipts can be printed easily and quickly on request. You will notice that, at the end of the transaction, summary details of the transaction are displayed in the main display area of the screen.

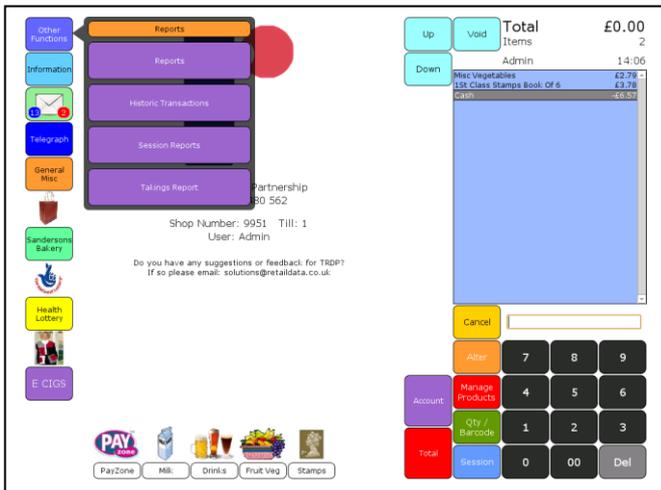


Beneath these details on the screen is a rectangular key **Receipt**. If you select this key, a receipt is produced by the receipt printer.

6.7.7 Historic Transaction

Another useful function is the ability to print 'Historic' receipts from transactions earlier in the day. To do this, touch **Other Functions** on the main screen then **Administration** then **Reports**. Select the **Historic Transaction** option.

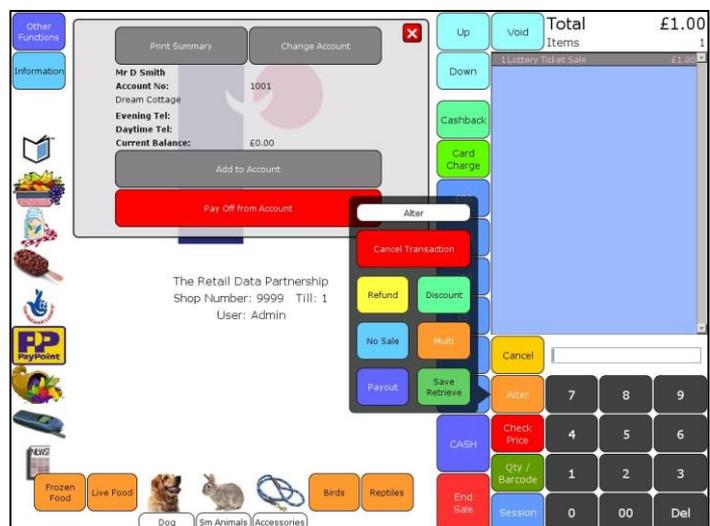
The screen will display a full list of transactions performed during the day, with details of time of day, total amount of the transaction, and the amount tendered. If you select and retrieve any of these transactions, it is possible to print a customer receipt. This function is useful for resolving change disputes later in the day, and also for customers who remember that they need a receipt after they have left the shop.



6.7.8 Cancel the whole transaction

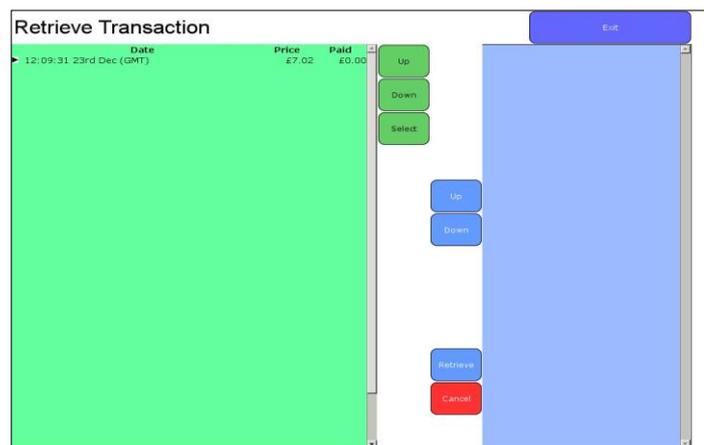
You might need to cancel an entire transaction at some point. If this is so, then select the **Alter** key.

A number of options will appear, including **Cancel whole transaction**. If you select this, the whole transaction will be deleted from the system. The fact that a transaction has been cancelled is recorded on the system, and is shown in the Session Report. Details are also shown in the Altered Transactions report



7. Save & Retrieve

This function gives the user flexibility when a customer wants to interrupt a transaction - if they have suddenly remembered an item that they need. If there is a queue in the shop, the user might want to serve others while the first customer finds the product they need. You can save the current transaction, complete other transactions



then go back to the transaction you saved, add items to it and complete it as normal. Some systems call this 'lay-away'.

When you use this function, ShopMate keeps separate records of 'open' transactions and completed transactions. You can use Save & Retrieve to look at all open transactions as well as all historical transactions that have been completed during the day.

7.1 Open transactions

If, during a transaction, the customer indicates that they have forgotten something, and you want to serve the next customer, select the **Alter** then the **Save / Retrieve** button. Select **Save** and start the next transaction.

When the first customer returns to the till to continue their transaction select **Alter** then **Save / Retrieve**. To find the saved transaction, select **Retrieve**. If more than one transaction is saved, find the required transaction using the **Up** or **Down** keys and press **Select** when you have reached the correct one.

The selected transaction is now displayed on the blue section of the screen. If there are more items in the transaction than can be viewed on the screen, the **Up** and **Down** buttons allow you to move through the transaction. Check to make sure it is the correct transaction for the customer in front of you. When you are sure you have the correct transaction, select the **Retrieve** button and continue with the transaction.

8 Making payments from the cash drawer

ShopMate allows you (or designated staff who have authority to do so) to make payments from the cash drawer, and ensure that there is an audit trail of these payments. There are a number of different situations in which payments will be made from the cash drawer. These are explained below.

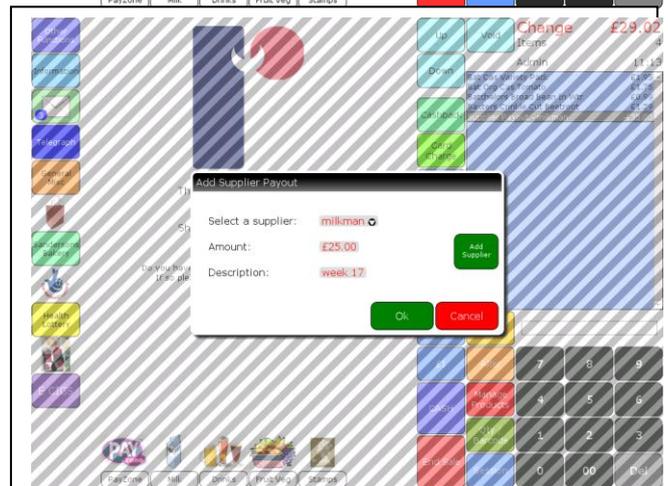
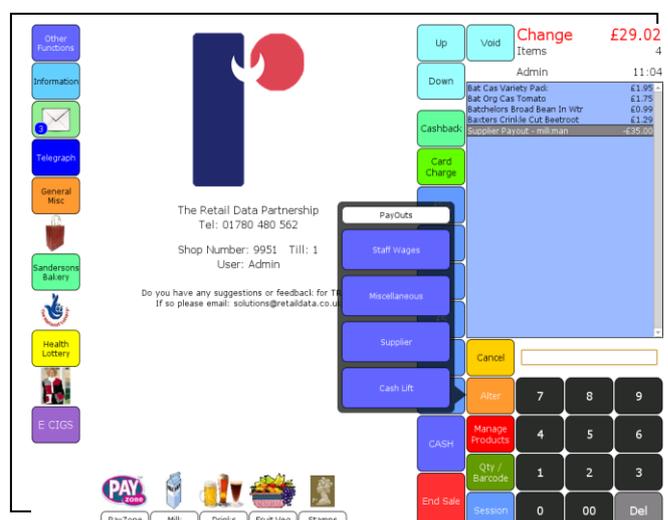
To enter the Payments function, select **Alter** then select the **Payout** option. You will be prompted to key in the correct PIN number (if security is in place.)

8.1 Payouts Staff Wages

To pay staff from the cash drawer, key in the amount you wish to take out of the cash drawer then touch **Staff Wages**. The cash drawer will spring open to allow you to obtain the cash. This amount will be recorded as having been paid to staff, at a specific time on a specific date.

8.1.1 Supplier Payouts

This is designed for payment of suppliers such as a local baker, or the window cleaner etc. Follow the same procedure as in 8.1 but select **Supplier** rather than **Staff wages**. You will then have the option to add specific suppliers i.e. Milkman or Bread man. These payout details will be recorded on your end of day figures.



8.1.2 Cashlifts

The same principle applies to cashlifts. Enter the amount of cash being removed from the cashdrawer and select **Cashlift**. You can then select a destination for the cash.

8.2 Refunds

If you allow refunds on products, it is easy to perform and record these using ShopMate. The user scans the product, which is displayed in the light blue Till Roll section of the screen. You then touch **Alter** then **Refund**. You will see the status of the item change to show a negative value, equal to the price of the item. The screen will display the amount of money that you should give to the customer. You can now move on to the next transaction. Refunds are recorded in the Session Reports, and also in all financial summaries. In addition, you can see more detail on refunds in the Altered Transactions report.

8.3 No Sale

If you need to open the cash drawer without starting a transaction, select **Alter** then **No Sale** and the cash drawer will open. You can lock the screen by pressing the **Session** button then **Lock Screen** hotkey that looks like a padlock. If you lock the screen you need to know the PIN number to unlock it, otherwise you will not be able to use the till. No Sale cannot be used during a transaction.

A light blue rectangular button with the text "No Sale" in white.

8.4 Multi

A red rectangular button with the text "Multi" in white.

This is in the **Alter** key and multiplies the price typed in for a miscellaneous product. E.g. press £1.20p then a miscellaneous key. This will put a miscellaneous product in the till roll at £1.20p. Then press a number followed by the Multi key to multiply.

8.5 Qty / Barcode

A green rectangular button with the text "Qty / Barcode" in white.

By pressing a number before you scan a product eg. 3, there will be 3 of the product in the till roll. If you then press 4 followed by the **Qty / Barcode** key it will change the quantity to 4. If you type in the barcode of a product and then press the **Qty / Barcode** key it will enter the till roll as if you scanned it.

8.6 Messages



The message button on the front screen shows blue or red numbers in the corner. This indicates the number of unread messages. A blue number denotes a service message and a red number denotes an 'Added Value' message.



To Read a Message, select the message button then select the message you wish to read. The message will display on the right of the screen.

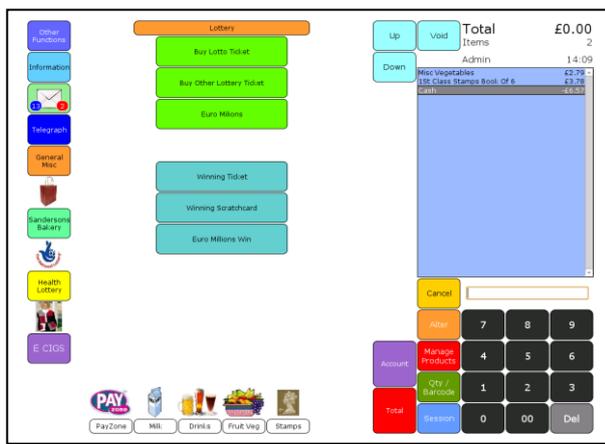
To Delete a Message Select the envelope at the bottom of the screen with a red cross on it.

9. Lottery transactions

This section describes how easy it is to process lottery transactions with ShopMate. Some shops like to keep their lottery transactions completely separate from the rest of their business, but others combine the two kinds of business using the same till. ShopMate has been designed to let you combine the two, whilst giving you an accurate audit trail of the different kinds of transaction.

9.1 Buying a ticket

All lottery tickets will now scan on the till using the small barcode on the ticket. All scratch cards should be scanned, which will enable you to control your scratch card stock more accurately. The product description will be shown in the till-roll section of the page, with the appropriate price.



9.2 Winning ticket or Scratch Card

If the customer presents a winning ticket or scratch card, your lottery machine (or the card) will tell you how much cash should be paid out. Enter the amount you will pay out, then select the [Winning Ticket](#) or [Winning Scratch card](#) button. If the overall amount of the transaction goes negative, ShopMate will automatically end the transaction. If the overall amount of the transaction is NOT negative (i.e. the customer is buying goods of a greater value than the winning payout) then you will need to complete the transaction in the normal way.



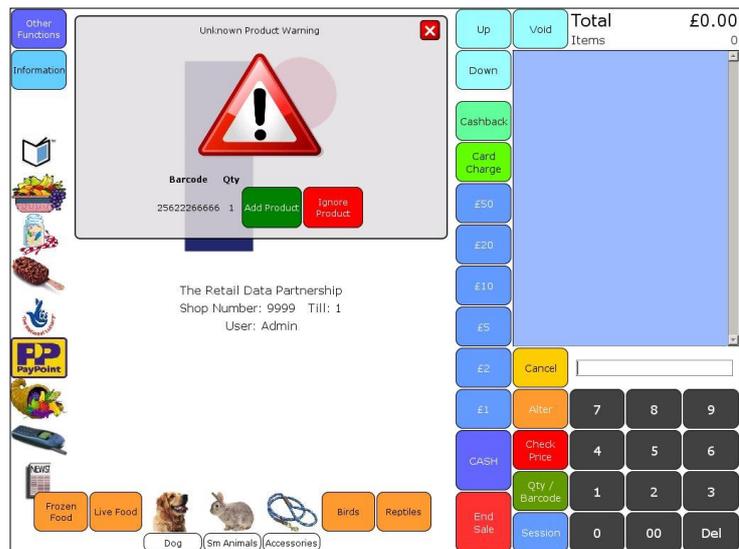
9.3 Lottery report

In the reports suite, there is a Lottery report. This shows the totals of all lottery ticket sales, winning payouts, and the sales of individual scratch cards. If you are a sub post office, you need to report these totals through the post office books. Otherwise, this report is a useful cross-check against the figures you get from the lottery operator, Camelot.

10. Manage Products

There are a number of important points about adding new products. These are summarised here:

- When adding the description of a product, think about how you (or another member of staff) will re-order it when it starts to run out. Give enough detail to identify it easily e.g. weight, volume etc. If it is a soft drink do **not** just enter the description 'pop'.
- Although there are some essential fields that must be entered when adding a new product, it is helpful to enter as much information as possible, such as pack size, pack cost etc. For example, if you operate a pricing policy that is based on the cost price of products, pack size and cost are vital to you, even though they are not shown as essential fields in ShopMate.



The essential fields that you **must** enter are:

- Barcode
- Product description
- Retail price
- VAT status

Without these items you will not be able to complete the entry.

If a product does not scan, a message will display on screen, giving you the option to add the product immediately, or ignore it. If you want to add it immediately, select **Add Item**. If you want to add it later use an appropriate hotkey such as **Misc VAT** or **Misc non-VAT** to complete the transaction. When you are ready to add the product, select **Manage Products**. A Product Management screen will be displayed in the main display area prompting you to add a barcode by scanning or touching the barcode box and typing in a barcode. Then select **Submit**. If the product is not recognised by ShopMate, you will be asked if you would like to **Add** the product. If you select **Yes** you can add a description, VAT information and selling price. By touching the boxes you need to input information, either a number pad, a keyboard or a drop down box will allow you to do this.

10.1 Editing a Product

If the product is recognised but you need to change anything to do with that product - price, stock level, description, etc, select **Manage Products** on the front screen. You can then scan a product or type in a barcode. In this screen you can change the details of the product and select if it is locally managed in your store, or managed by TRDP. The different functions available are listed below. When you have entered any information select **Submit**. If at any time you press **Apply**, ShopMate will apply the information for the till to use. When you have finished with the Product Management screen press **OK**.

10.2 Details Tab

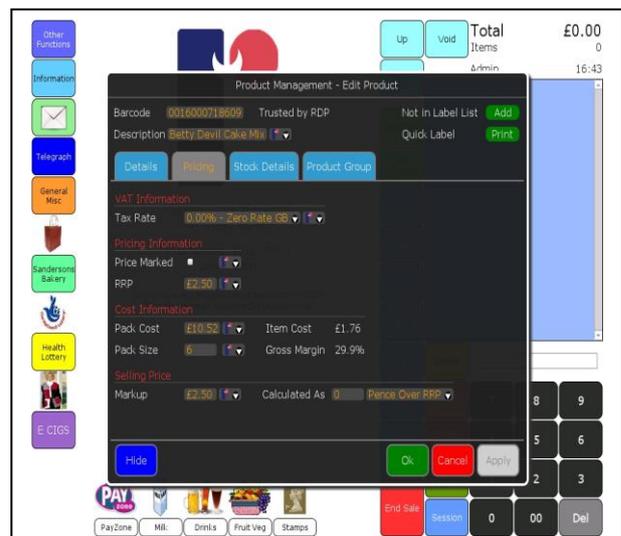
10.2.1 Categorisation can be swapped between a TRDP category and a User category. The default is set to the categories set by TRDP and is titled RDP. You will need to set up your categories before you can manage them locally. See section 11.1 of the manual. If you select [Locally Managed](#), you can assign the product to one of your categories.



10.2.2 Product Information The Item Size will be set by us if we have the information. You can select [Locally Managed](#) and enter the information you have on the product.

10.2.3 Shelf Edge Label By selecting [Print](#) you can print a temporary label instantly. Selecting [Add](#) will add a label to the shelf edge label list to be printed off on your laser printer.

10.2.4 Pricing Tab In this tab you can set the VAT level, adjust cost information and selling price. You can also set how that price is achieved. Select the appropriate box and a number pad will pop up for you to change any of the information shown. From the moment you change the price on your ShopMate system, the new price will be used for all new sales of that item. (Price changes can also be made on the hand held scanner.) For example, the selling price is shown at the bottom of the screen as Mark Up. To change a price, select the price you are selling at. A numberpad will appear for you to type in the new selling price. Now select [Submit](#) then [OK](#) or [Apply](#). ([OK](#) will [Apply](#) and exit the screen while [Apply](#) changes the price but keeps you in the screen.)



In the [Pricing Tab](#) you can also change the method of pricing that you use. Select the down arrow at the end of the [Calculated As](#) section to see the ways in which you can manage your prices. The default method is described as [Set Amount](#). In this mode, if you change a price, the system will not change the price again unless YOU change it. This is true even if the RRP or the cost price is changed in the file sent to us by your wholesaler. NOTE: If you want to price your products in relation to their cost price, or as a gross margin, you will not be able to do so if you have not added cost data for the product.

If you decide to use one of the other options for managing your prices, for example. % over RRP, then, when the RRP on that product is altered by the wholesaler, the system will automatically change the price

according to the percentage over RRP that you have set when that new price reaches your tills. You need to be alert to all price changes that come through to your system otherwise your shelf edge labels will not be correct. To keep up with price changes, you need to look at the [Price Change](#) report frequently, and change the relevant shelf edge labels.

The different options for managing your prices are:

% over RRP

% of RRP

pence over RRP

pence over Cost

% of Cost

% Gross Margin

Set Amount (default mode)

If you select any of the above options, the appropriate calculation will be done and the selling price put into the New [Marked-up Price](#) box. See the section on 'Managing prices the ShopMate way' for more information about different methods you can use for managing your pricing.

10.2.5 Stock Details Tab Here you can make changes to the following sections:



10.3 Wholesaler

See section 11.2

10.3.1 Product number

select the box and a keyboard will appear for you to enter the product Number.

Select the box and a keyboard will appear for you to enter

10.3.2 Adjust Stock

Stock Take
Goods In
Damaged
Returned
Not Sold
Out of date

Select the [down arrow](#) in the Adjust Stock section of the screen and select which function you need. Select the box and enter the quantity of the product you are dealing with. Select [Apply](#) to assign the amount to a specific category.

10.3.3 Minimum Quantity

Set the quantity of a particular product you want your stock to go down to before it goes on to your re-order report.

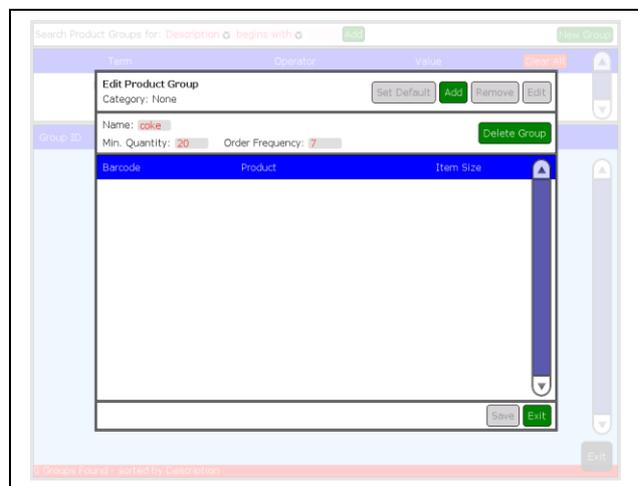
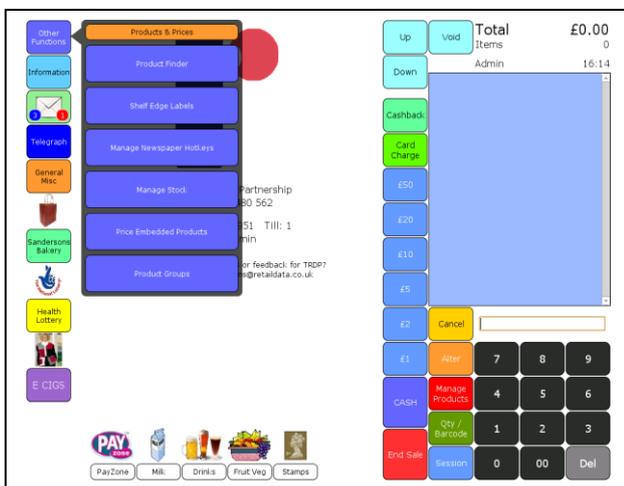
10.3.4 Order Frequency

Here you can set the frequency that you order from your wholesaler. The default is once a week. ShopMate will then use this along with a number of other criteria to work out a suggested order list.

10.4 Product Grouping

Product Grouping allows the operator to group the same items with different barcodes e.g. Coke 'world cup edition' and standard Coke. This will enable the operator to carry out stock takes on the group regardless of crossover of stock with different barcodes. It will also add the group to the re-order report when stock levels fall below a pre-determined amount.

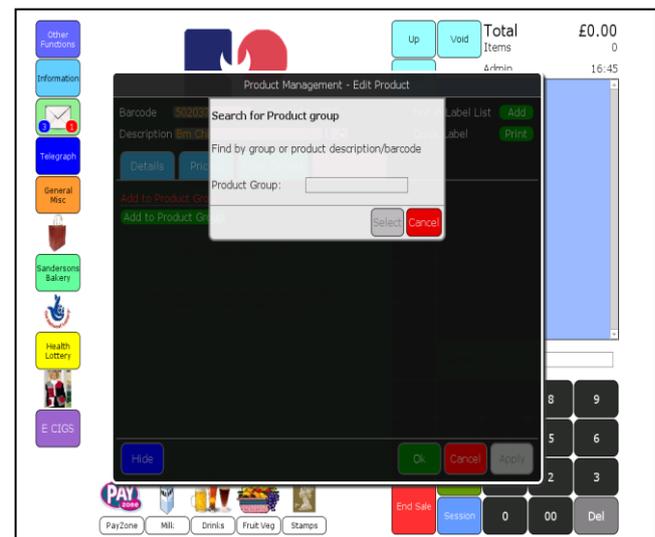
10.4.1 Creating a Group



Select **Product Group** from the **Products & Prices** menu. This will allow you to set up a new group name, minimum quantity for ordering purposes and scan the items you wish to put in the group.

10.4.2 Product Group in Product Management

In product management, individual items can be added to a specific group by selecting the **Product Group** tab and then selecting **Add to Product Group**. A dialogue box will appear allowing you to search for the group you need.

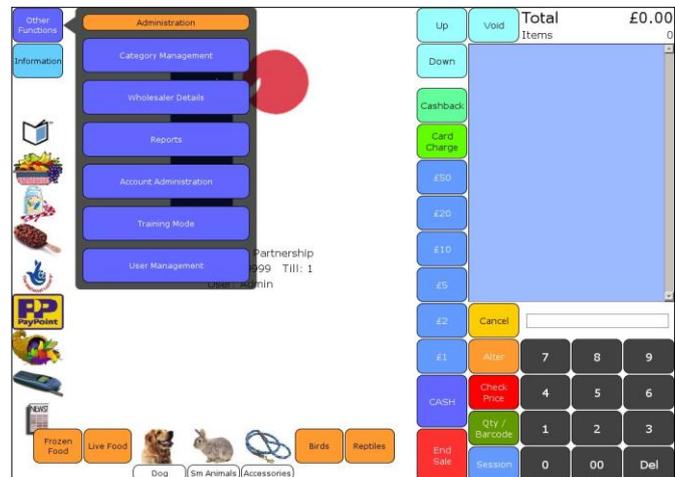


By selecting the [Hide](#) button the manage products screen will disappear without losing any data. To recover the page press [Manage Products](#) again.

II. Administrative Functions

II.1 Category Management.

As part of our service to customers, TRDP categorises products into our standard categories. We have tried to identify and name categories that will fit in with the ways in which most wholesalers and retailers view their products. We are aware, however, that there is no such thing as a 'typical retailer', which means that some retailers will want to establish their own categories. With the ShopMate system, you can choose to assign products to your own designated categories rather than use the default TRDP categories. If you decide to use this option, **all** of your stock will need to be categorised into your own categories, otherwise you might have some difficulties with your reports.

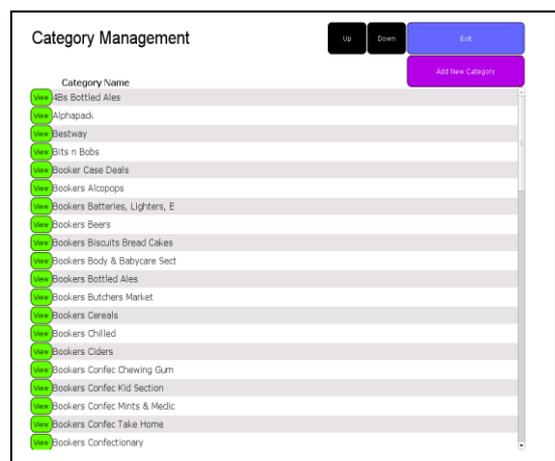


Adding a Category.

To add a category select [Other Functions](#), then [Administration](#), then [Category Management](#). A new screen will be displayed. By selecting [Add New](#) you will be able to enter a description for the category by touching the relevant box and using the displayed keyboard. Then you need to select [Save Current](#). Another category can then be added by selecting [Add New](#) or select [Back to Category List](#) to view the categories you have created.

Deleting a Category.

To delete a category from your system select [Other Functions](#), then [Administration](#), then [Category Management](#). A new screen will be displayed. Select [View](#) on the category to be deleted. The category description will be displayed. Select [Delete Current](#) to delete the category.



Assigning to a Category.

You can assign a product to a category that you have created by selecting [Manage Products](#) then add a barcode. Go to the [Details](#) Tab, touch the [down arrow](#) in the User Category of the screen and select a category.

II.2 Wholesaler Details.

The ShopMate system allows you to keep details of your wholesalers.

Add New Wholesaler

To add a new wholesaler's details select [Other Functions](#) then [Administration](#) then [Wholesaler Details](#). A new screen will be displayed. By selecting [Add New](#) you can enter details of a new wholesaler by touching

the relevant box and then using the keyboard displayed. When you have finished entering details, select [Save Current](#).

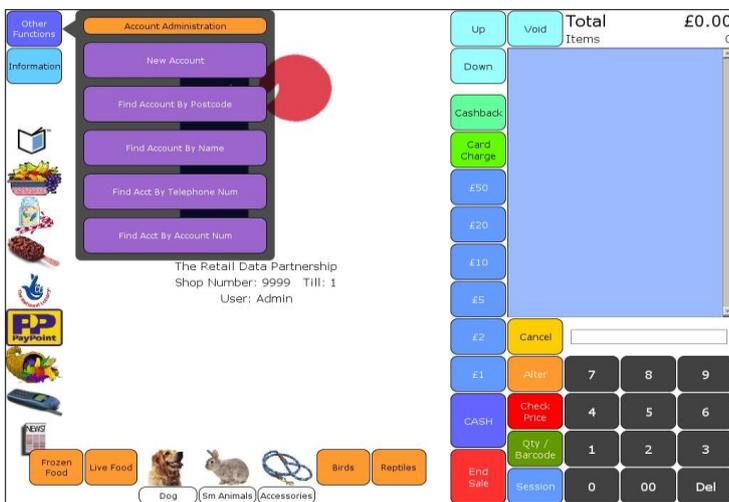
Edit wholesaler

To edit a wholesaler's details select [Other Functions](#) then [Administration](#) then [Wholesaler Details](#). A new screen will be displayed. By selecting [View](#) on the wholesalers you wish to edit, you can edit details of the wholesaler by touching the relevant box and then using the keyboard displayed. When you have finished putting in details, select [Save Current](#).

To assign a wholesaler to a particular product, go to [Manage Product](#), add a barcode and go to the [Stock Details](#) Tab. Select the [down arrow](#) in the Wholesaler section of the screen and select the wholesaler you require. Press [Apply](#) to assign the product to the wholesaler and [OK](#) to finish.

11.3 Setting up a new account

If you have the option to run accounts, select the [Account Administration](#) function, and touch the [New Account](#) button. A new screen will load. ShopMate automatically assigns a unique account number to each

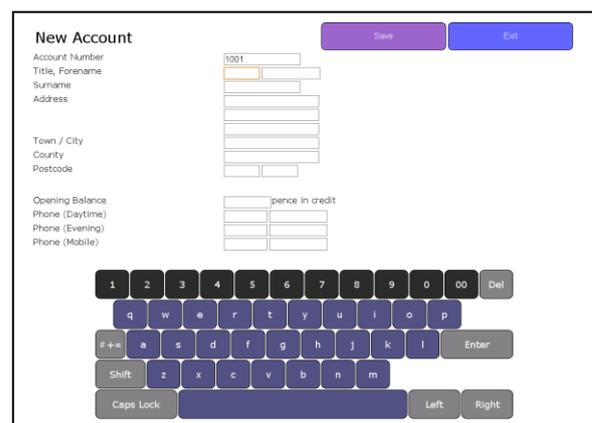


new account. You need to complete as many of the available fields as you wish, remembering that you will be able to search for an account by name, telephone number or postcode. The search operates on the *second* part of the postcode and on the telephone number *without* its STD code. When you have completed as much of this screen as you feel is necessary, select the [Save](#) button, otherwise you will lose all the information you have added.

You can enter an opening balance on the new account. This can either be positive (if

the customer has given you some cash in advance) or negative (if the customer already owes you some money.)

You can print a summary of the last 12 transactions on an account which covers purchases by the account customer and payments into the account to reduce the balance. This can be printed off the receipt printer at any time. ShopMate also generates a monthly account statement on each account. This lists account transactions and account payments over the past month. It can be printed off the laser printer at any stage during the month following the month of the report. For example, if you want the account statement for December, you can print it off at any time between 1st – 31st January. On 1st February, the December statement will no longer be available, as the January statement becomes available.



11.4 Managing and using promotions

You can operate a variety of promotions on ShopMate. We can set up promotions on your till(s) for you. This is particularly useful if you are part of a symbol group, as many of the symbol groups send promotion details to us in advance. For your own promotions, you need to send details to TRDP to set up and delete

promotions. The details that we need are shown on the document contained in Appendix I of this manual. If you have set up your own promotions, it is **important that you keep a record of the promotions you have set up, and particularly their end-dates**. You can check these details in the [Current Promotions](#) report on your system. If you don't check, you might be surprised when promotions suddenly stop running. This could cause irritation amongst staff and customers.

You can manage your own promotions either on the till or, if you have the 'Window on the till' back office software connected to your till(s), you can manage promotions there. The management process is the same on both.

If you wish to enter promotions, select [Other Functions](#) then [Promotions](#). You will be prompted to select a period for the promotion. Either enter the dates for a new promotional period by touching [Add New Promotions Period](#) or select the down arrow next to the promotion period dates to open the drop-down box showing the available promotion periods already on the system.

If you touch [Add New Period](#) then [Set Dates](#), the screen will display a calendar for you to select a start date. When this has been selected another calendar will be displayed for you to select an end date. Please NOTE that the dates are inclusive. When you have selected the dates, select [SAVE](#) to save your new promotions period.

Then select the promotion period that you want to use by dropping down the promotions date box (touch down arrow) and selecting the required dates, then press [GO](#). The [View Promotions](#) screen displays. To add a promotion, click on [Add Promotion](#). The [Add Promotion](#) screen displays. The top of the screen shows the type of promotion that will be added. To see the choice of promotion types, press [Change](#).

The different options are:

1. *Buy One Get One Free*
2. *Multibuy –* e.g. any four of these five different chocolate bars for 99 pence
3. *Reduced to –* e.g. price reduced from x to y.
4. *Reduced by -* e.g. amount reduced by.
5. *Meal Deal -* e.g. buy a 1st, 2nd, and 3rd item for a set price or a % off.
6. *Buy No. Get One Free –* e.g. Buy N of a range of products, and get the most expensive one of N for a specific price. For example, if you had five products in the promotion, priced at 39p, 49p, 59p, 69p, & 79p, you could set the most expensive one to sell at 40p. Alternatively, you could set the cheapest one to sell at a different price, say, 15p
7. *Linked Promotion* e.g. buy two bottles of shampoo, and get Hair magazine for £1.00(P) where P could be zero.

Select the promotion type you require, by pressing the [Pick](#) square next to it. The screen will display the boxes into which you need to add details. The first box needs a description of the promotion. This is what you will see on the screen of the till.

NOTE: The different types of promotion require you to complete different boxes on the screen. It is very important to remember that, if you enter any barcodes, you MUST press the [Add](#) square to the right of the data entry box to add the barcode to the promotion details. Then, when you have entered all the details of the promotion, touch [Save](#). Occasionally a barcode will be added that is not on your till. You will be asked if you would like to [Add it Anyway](#). If you say [Yes](#), the promotion will work for that barcode as soon as it is added to your till.

You can review the promotions you have entered by selecting [Back](#) at the top right corner of the screen. If you then touch the promotion description, it will bring up the promotion which can be edited and new products added. You can also see a detailed report by selecting [View Report](#). You can edit a promotion period by selecting that period. You will then be offered [Add Period](#), [Remove Period](#) or [Edit Period](#). If you select [Edit Period](#) you can [Set Dates](#) and then [Save](#).

To delete a promotion, go to the list of promotions in a particular promotion period and tick the box under [Rem](#) then touch [Remove Promotion](#).

11.4.1 How promotions work at the point of sale

When a customer presents the items on promotion at the point of sale, and they are scanned, ShopMate recognises the promotional barcodes, and automatically performs the calculation to reduce the price paid by the customer. The ShopMate user does not have to take any specific action. When a promotion has been triggered, the details of the promotion are shown on the light blue 'Till Roll' section of the screen (e.g. BOGOF or 25p off.)

ShopMate also produces promotion reports that show which promotions are in force at a particular time, and also gives details of how many times each promotion has been invoked.

11.4.2 Obtaining promotion details

The promotions you choose to run in your store are generally those provided by the Symbol Group you belong to, or come directly from the wholesaler. Sometimes one or more of the barcodes provided by the wholesaler is incorrect and this can cause problems once the promotional period begins. To prevent this happening, please check the barcodes involved with the promotion on your till and notify us of any errors as soon as possible. This will ensure that the promotional offers scan through the till correctly.

12.1 Shelf-edge Labels

When a new price file has been loaded onto your system, you can review the price changes on the [Price Changes](#) report. This gives the details of price changes on any products in your shop and also gives you the option to add these new prices to your shelf edge label list.

Shelf-edge label printing can be managed in a number of different ways. If you change the price on the till in the [Manage Products](#) mode and the [Details](#) tab, you can print out either a temporary shelf edge label from the receipt printer by selecting [Print Quick Label](#). This will be printed on thermal paper, however, which does not have a long shelf life. It would be sensible, therefore, to touch the [Add](#) button as well, so that the details of the item are added to the list of labels to be printed off the laser printer later.

If you change the prices of products away from the till, using the hand held scanner, when you 'hotsync' the scanner with the till, the prices will be changed immediately. The list of items that have had their prices changed will also be added to the label list so that you can print labels off the laser printer when you are ready to do so. Be aware that Trading Standards require you to have accurate and visible pricing on all items, and that the prices advertised on the shelf or the product must match the prices charged on the till.

12.1.1 Operation of shelf edge label printing from your laser printer

To print shelf edge labels from your laser printer, you need to add details for each product to a list that contains details of the shelf edge labels that you wish to print. When you have enough products on the list, you can print the labels onto a sheet of paper or a sheet of pre-cut labels. The printer is pre-formatted to print onto an A4 sheet that contains 21 labels (3 across and 7 down.) The size of these labels is determined by the height of the most widely used shelf edge fittings used around the UK.

You can edit the list by adding items from the [Manage Products](#) screen, or by scanning an item when you are in the shelf edge labels list screen, and adding it to the list. To delete an item from the list, touch the [rem](#) button to the left of the item you want to delete.

Features of this system are:

There is a button on your [Products & Prices](#) sub-menu called [Shelf Edge labels](#), All labels waiting to be printed will be shown. You can also tick a box which will print promotion labels. Products can be ticked or unticked allowing you to decide which labels to print.

To add an item to the list:

Select [Manage Products](#)

Scan the item you want to select.

Select the green [Add](#) button at the top right of the screen.

To review the list, [Exit](#) from the [Manage Products](#) screen, and go to [Products & Prices / Shelf Edge Labels](#). Then use the [Print Product labels](#) button to display the list.

When the list is displayed, it shows how many items are on the list, and shows each item. To remove an item, select the small [rem](#) button to the left of the item you want to remove.

To clear the whole list, select [Clear Shelf edge list](#)

To move up and down the list, use the [Down](#) or the [Up](#) buttons.

To print the labels, make sure that you have put your label sheet into the printer, (face up in the paper tray) then select the [Print Shelf Edge labels](#) button. The list will print. (You can also use the single-sheet feed for the label sheet.)

You can print as many or as few labels onto a sheet as you wish. If you do not have a large number of labels to print, you can add a few items to the list, and print a label off the receipt printer as a temporary measure until your list is ready to print a full page.

You can also add products to the list of labels to be printed by going directly to the [Print shelf edge labels](#) button, and adding products on that screen.

For till rolls, printer cartridges and shelf edge labels: Talpa Office Products Ltd, 2nd Floor, 5 Princes Road, Shepton Mallet, Somerset BA4 5HL Tel 01749 330683 email : philip.smyth@talpaoffice.co.uk

13. Stock Management This is one of the most neglected tasks in the convenience retailing sector. The main reason it is ignored is that it does require a greater level of management discipline than most convenience stores are able to maintain.

The main benefits of managing stock accurately are:

You can identify stock theft more easily;

The suggested re-order report on the system works, because the system knows what is in stock.

This should save huge amounts of time when ordering.

Our suggestions when starting to manage stock are:

1. Don't start by doing a stock-take of the whole shop. Do a stock-take of your cigarette gantry and cigarette stocks. Then make sure you get into the habit of scanning Goods In whenever any new tobacco stock comes into the building.

2. Once you are comfortable that EVERYBODY in the business is operating according to this discipline, then do a rolling stock-take around the shop. For example, on Monday evening do all your spirits, on Tuesday, do all wines, on Wednesday etc. until all your stock figures are accurate.

3. REMEMBER, that once you have done the stock-take, it is ESSENTIAL to scan Goods In for the stock that you have counted. Otherwise the whole exercise is a waste of time.
4. ALSO, you will need to get into the discipline of doing regular stock-takes. No matter how careful you are, stock figures do get out of alignment with the actual stock on the shelf. The best-run supermarkets in the country do have regular stock-takes to ensure their figures remain reasonably accurate.
5. ONE RULE that everyone needs to understand is: Goods In always ADDS to an existing stock figure, whilst Stock Take always OVER-RIDES an existing stock figure. So, for example, if you have a stock figure in the system of -15, and you add 10 items via Goods In, then the stock figure becomes -5. If, however, you add 10 items as a Stock Take figure, then the stock figure becomes 10.

13.1 Goods In, Out of Date, Not Sold, Returned and Damaged.

If you want to add goods to stock at the till select [Other Functions, Manage Stock](#). The screen will change to a 'Manage Stock' screen. Select the [Goods In](#) tab. Scan an item or select [Input Barcode](#) and enter the barcode. You can then edit the products in the session by selecting the session (touch the line) and select [Edit Goods In Session](#).



Select the quantity and a number pad will appear. Alter the quantities and select [Submit](#). You can also add more lines, print stock session or exit. To add your goods in session to the stock on your till select [Commit Goods In Session](#). You will be asked if you are sure, select [OK](#).

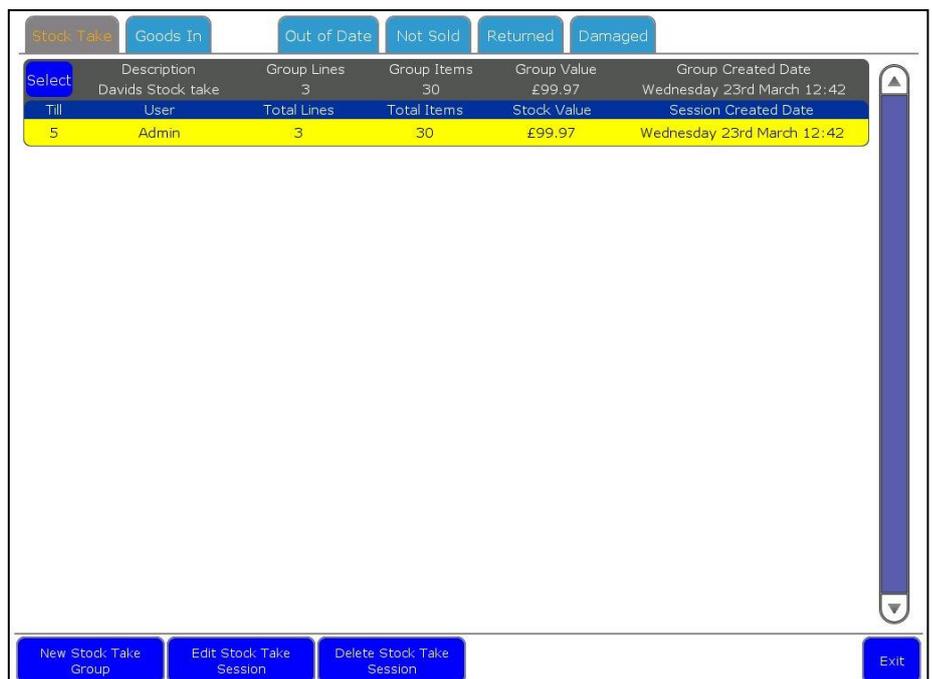
There are four other options in Manage Stock which operate in the same way as Goods In which are Out of Date, Not Sold, Returned and Damaged.

13.2 Stock Taking

First, make a 'Stock Take Group'. You can then assign several different sessions of stock taking to the group and then commit the group. This enables you to have more than one person doing a stock take at any time.

When you commit the group, you will update your system with the new information, which can be viewed in relevant reports.

To carry out the Stock Take:
[Other Functions / Manage Stock / New Stock Take Group](#)



You will be prompted to give a description to the Stock Take Group. Complete the required field and select [Save](#).

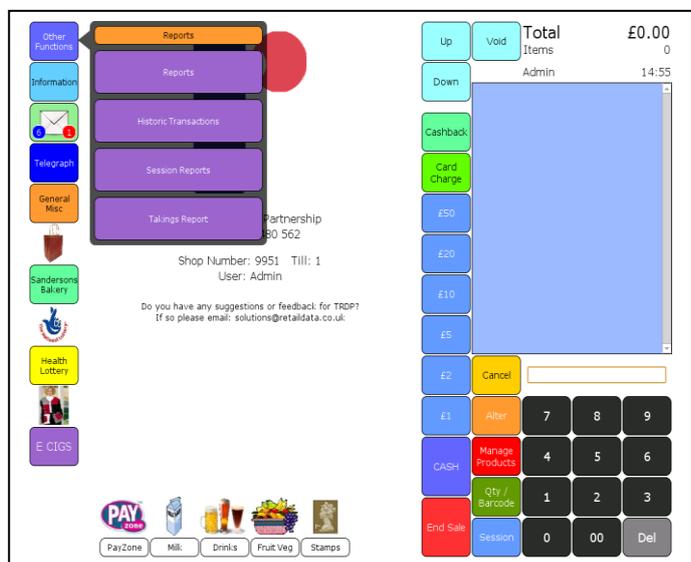
You will see the Stock Take Group that you have just created. Assign the stock take sessions to the group by pressing [Select](#) to highlight the group. Several buttons will appear at the bottom of the screen. Select [Add Stock Take Session](#), and you will be prompted to add products to the list. To do this select [Input Barcode](#) and enter the barcode manually using the keypad provided, or scan the barcode using a barcode scanner. Select [OK](#). The item will be added to a list and you can amend the quantity. To do this, select the highlighted number under the heading [Quantity](#), then using the numbered keypad enter the correct quantity, and select [Submit](#). If you make a mistake you can delete that product line using the [Delete Product](#) button. When you have finished editing a group of sessions you need to select the group and select [Commit Stock Take Group](#). Only then will your figures on the till be updated.

When you have finished you can print that stock session report by pressing the [Print Stock Session](#) button.

14. Reports

This section describes the reports prepared by ShopMate to help you run your business more efficiently and more profitably. These reports can be viewed and printed on a back office as well. The reports available in the first page or 'favorites' page are:

- Current Promotions
- Financial Summary
- Lottery
- Price Change & New Products
- Product Sales History
- Re-Order
- Sales
- Stock
- Top Seller



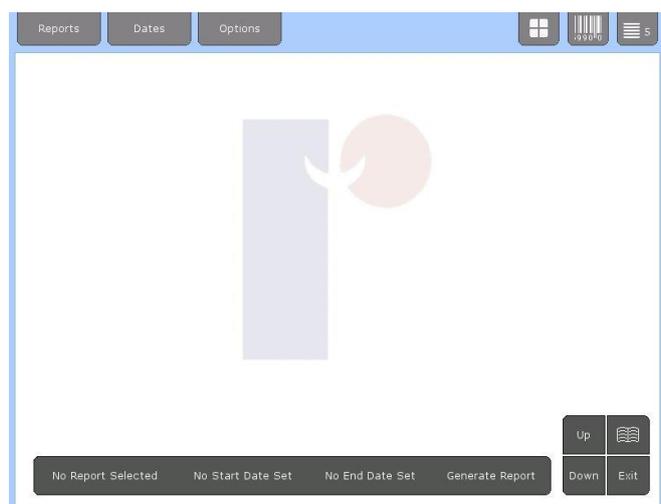
To access the reporting interface, go to [Other Functions->Administration->Reports->Reports](#). When you select this, a new screen is displayed, as shown here.

Reports, Dates, Options: These are used to select the report you wish to generate, the dates you wish to generate the report for and any options you wish to select.

Report Bar at the bottom of the screen: this shows the selected report and the selected dates.

The [Generate Report](#) button on the right hand end of this bar will become green when the necessary options for the selected report have been chosen, and the report can be generated. Select the green [Generate Report](#) button to start creating the report.

The [Control Panel](#) in the bottom right corner enables you to scroll the report (once generated) up and down, exit the interface, and show a range of 'bookmarks' for the report displayed on screen. The



bookmarks enable you to move to a selected section of the report rather than having to scroll up and down through the report.

Miscellaneous options in the top right include the options to hide the Control Panel, use the Report Stack, and look at the Product Comparison list.

Reports available:

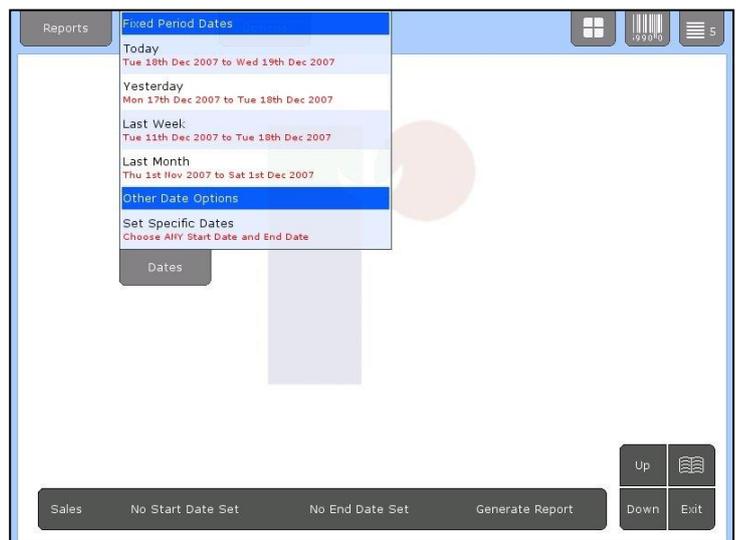
Financial Summary
 Sales
 Promotions
 Lottery
 Stock
 Product Comparison
 Product Sales History
 Product Grouping Sales, re-order, stock
 Delisted Stock
 Pet Financial Summary
 Current Promotions
 Alterations
 Transaction Finder
 Pricing
 Price Changes & New Products
 Re-Order
 Goods In
 Top Sellers
 Price Margin
 Stock Adjustment
 Accounts
 Footfall
 Footfall by day
 Voucher report
 Daily Category Sales
 Stock Summary
 Top Profit
 Stock Take Discrepancy
 Payouts
 User Sessions
 PayPoint Sales
 Account Balance
 Supplier Payouts
 Cash Lifts
 Age Check

Summary of Sales
 Sales grouped by Category
 Sold Details of Promotions triggered
 Summary of Lottery Sales and Payouts
 Stock Levels grouped by Category
 Compare Product Sales with graphs
 View selected barcodes sales history
 Three reports covering Product grouping
 List of delisted stock
 Summary of Sales
 Show the Promotions that currently apply, or will apply
 Sales changed by Voids, Refunds, Discounts, or No Sales
 Find Transactions based on supplied Criteria
 Pricing of All Stock Products
 Price Changes & New Products
 List of Items needed to be ordered
 Report showing Goods In for selected period
 Top Selling Products
 Find Products selling below RRP etc.
 Details of changes in stock levels
 Find Account Transactions
 Total number of transactions over a period of time
 Number of transactions by day
 Shows vouchers redeemed
 Category Sales by Day for a Week
 Show a Stock Report Summary by Category
 Top Profit
 Show Discrepancies in Stock after Stock Take
 Details of till pay-outs
 A list of login/logout and Session times of users
 Details of PayPoint related sales
 Summary of Account Balance
 Details of till payouts to suppliers
 Details of till Cash Lifts
 Details of Age Check

Generating a Report

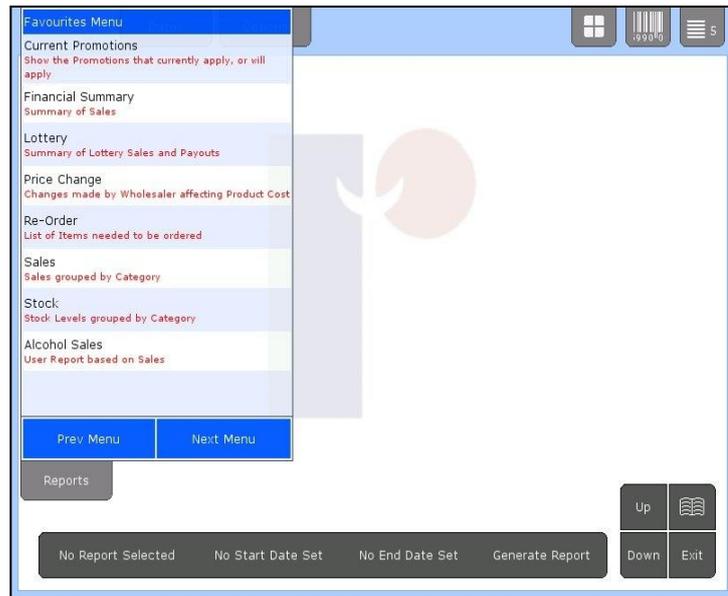
There are four basic steps to generating a report.

- Select the report type you wish to generate
- Select the dates you wish to use
- Select any options you wish to apply to the report
- Press Generate Report



To select the report type, tap the **Reports** tab at the top left. This will drop down a list of the available reports, with a brief description of what the report offers. To select a report, tap on it. This will close the menu, and you will see the report name appear and flash in the **Report Bar** at the bottom of the screen. To close the list without selecting a report, either tap again on the **Reports** tab, or anywhere else on the screen. The options available in both the **Dates** and **Options** menus will change depending on which report is selected. For example, most reports require a date range to be selected for which the report will be generated. Some reports, like the **Stock Report**, do not require a date. If you select such a report, the dates will vanish from the **Report Bar** at the bottom, and the **Dates** menus will be empty. Also, different reports have different options available (some reports have no options at all.)

Once a report type has been chosen, select the dates that the report will cover from the **Dates** menu (if the report requires dates, see above.) Tap the **Dates** tab for a list of options. Depending on the report, they will be a short list of commonly used date ranges, such as **Today, Yesterday, Last Week** and **Last Month**. By selecting any of these, you will see the start date and end date of the report in the **Report Bar** at the bottom of the screen. The **Generate Report** button will go green, signifying that the report has the required details needed to be generated. If you are happy with the default options, you can now click

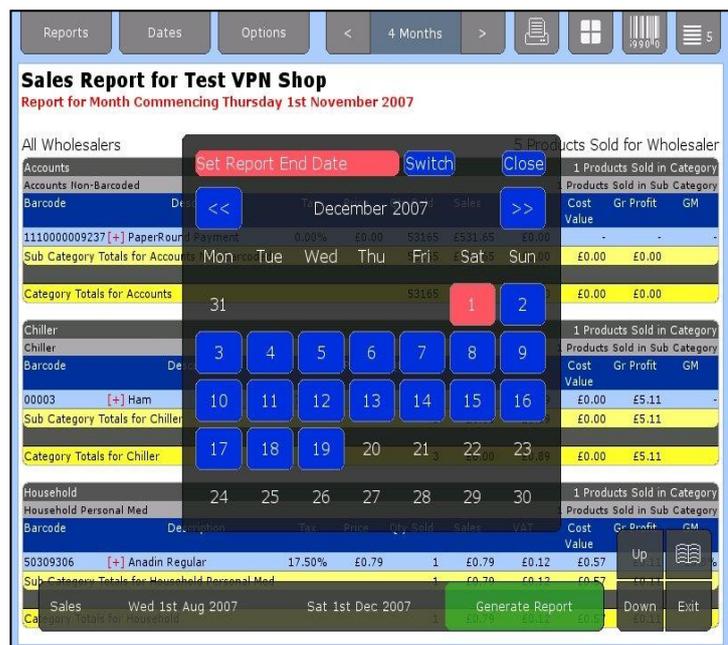


Generate Report, and the report will be compiled and displayed on screen.

Specific Dates

The final option on the **Dates** menu is to set **Specific Dates** for the report. If you select this, a **calendar** will appear on the screen. You need to set two dates for a report – a start date and end date. When selecting a date, it is important to realise that the date also refers to a time – midnight. This means that a report for the date 1st January 2011 actually needs to have a start date of 1st January 2011, and an end date of 2nd January 2011.

To select the dates, use the **Calendar** controls to navigate through time – the **<<** and **>>** buttons will go to the previous and next months. If you go to a month other than the current month, the **Now** button appears at the top of the Calendar – tapping this will return the Calendar to the current month.



Once you have found the date from which you wish the report to start, tap the [date](#), which will appear in the start date field in the [Report Bar](#) at the bottom of the screen. The calendar will also change slightly – instead of showing [Set Report Start Date](#) in green at the top of the calendar box, [Set Report End Date](#) will show in red, (as shown) prompting you to set the end date. Once you select the end date, the date will appear on the [Report Bar](#), and the calendar will close. The green [Generate Report](#) option is now enabled.

Important things to remember about the Calendar:

It is possible to select date ranges for which no data exists on the till, i.e. from before the till was installed. This will result in empty reports.

If you select a large date range the report can take a long time to generate. A rough guide seems to be:

- 1 day report – 2 - 3 seconds
- 1 week report – 5 -10 seconds
- 1 month report – 20 – 30 seconds
- 1 year report – approx. 5 minutes

These are rough estimates, as reports have of different complexities, and can take a varying amount of time to compute, even for similar date ranges.

The start date must be before the end date, otherwise the [Generate Report](#) button is disabled.

If when setting a date, the start date is already set correctly, you can use the [Switch](#) button to go straight to setting the end date without having to re-set the start date.

Date Control Panel

When you have selected a start date and an end date, a new option will appear at the top right of the screen that has two buttons, a left and right arrow, on either side of an amount of time, for example [< 1 Week >](#). This is called the [Date Control Panel](#). This is to save time when selecting dates for reports. For example, if you wished to select a weekly report for three weeks ago, you would have to use the calendar to find the correct dates. With the date control panel, you can select [Last Week](#) from the [Dates](#) menu, and then using the [Date Control Panel](#) just press the left arrow twice, and the dates in the [Report Bar](#) at the bottom of the screen should change to reflect the dates from three weeks ago.

The [Date Control Panel](#) is intelligent, in that for whatever period of time you select (using either any of the quick [Today](#), [Yesterday](#), [Last Week](#), [Last Month](#) options, or the [Set Specific Dates](#) options), the [Date Control Panel](#) will calculate the next, or previous instance of that range and allow you to jump to it. For example, by selecting a period that spans one day, the [Date Control Panel](#) will allow you to jump forward or back day by day. However, you might wish to select a period of a fortnight, and the buttons will then jump you to the next fortnight. It is worth experimenting with, as it can save time when generating a set of continuous reports.

By default, the week is assumed to start on a Monday morning at 12:00am. You can change this by selecting the [Options](#) tab, and touching the [Set Week Start](#) item. The month is assumed to start on the 1st also at 12:00am.

Report Options

Some reports offer different options. For example, a [Financial Summary](#) can have an option selected to display data from one till only, whereas the [Stock Report](#) does not have this option as stock is not tied to a specific till. There are also options for certain reports to display only certain categories. Certain reports give you the option of defining them by user (If User Management is used). These are Sales, Goods in, Transaction Finder, Footfall, Accounts, Stock Adjustment and Alteration reports.

Viewing a Generated Report

Once a report has been generated you can use the [Up](#) and [Down](#) buttons in the [Control Panel](#) to scroll through the report. Sometimes, the [Control Panel](#) in the bottom right will obstruct viewing of the report. In

this case, you can temporarily hide the Control Panel by tapping the icon at the top right of the screen (looks like four small squares). The Control Panel can be shown again by tapping this icon for a second time.

Category	Gross	Net
[+] Alcohol	£2590.38	£2204.67
[+] Cards	£121.62	£103.51
[+] Chiller	£4.87	£4.14
[+] Confectionery	£1119.34	£952.67
[+] Drinks	£725.02	£617.06
[+] Frozen	£127.50	£108.52
[+] Groceries	£276.69	£235.49
[+] Household @ 5.00%	£27.36	£26.06
[+] Household	£449.76	£382.79
[+] Miscellaneous	£35.74	£30.42
[+] News/Mags	£31.96	£27.20
[+] Pet	£20.45	£17.40
[+] Snacks	£254.10	£216.26
[+] Stationery	£65.09	£55.40
[+] Tobacco	£3808.30	£3241.24
Subtotal	£9658.18	£8222.83
[+] Promotional Discounts	-£268.25	-£228.31
[+] Refund @ 17.50%	-£12.17	-£10.36
Total VAT Product Sales	£9377.76	£7984.16

On some reports, you will see **[+]** symbols. These are buttons that will allow the user to interact with the report in some way. Usually, it is a way to 'drill down' from one report into a more specific report, but if you see the symbol next to an individual product, it can be used to add that product to the **Product Comparison List** (see later).

An example of 'drilling down' can be seen if you generate a **Financial Summary** report. Next to each category you will see the **[+]** symbol, and also next to any Promotional Discounts. By tapping this symbol, a new report will be generated. If

you click on the **[+]** next to the **Alcohol** category sales for example, a **Sales Report** containing only Alcohol sales will generate. If you click on the Promotional Discounts, the **Promotions Sold** report will be generated.

When a report is generated, you will usually be able to print it. The **Printer** icon will appear at the top right of the screen. Select this to see the print dialog box. Certain reports (involving graphs) cannot be printed.

Product Comparison

The **Product Comparison List** is a list of up to 10 products that can be grouped together for reporting purposes. At the moment, the only report that takes advantage of the list is the Product Comparison report. This compares the sales of products in the list in the form of either a bar chart or line chart of sales over time. You can select bar chart or line chart in the **Options** tab when the **Product Comparison** report has been selected.

To display or hide the list tap the **Barcode** icon in the top right of the screen. This will toggle the visibility of the list. If you add a product to the list when it is not visible (see below), the list will automatically display.

There are three ways to add a product to the **Product Comparison List**.

On the till only, when in the report interface, you can scan a product using the till's barcode scanner.

When in a report (such as **Sales Report**) that shows individual products, if the product has a **[+]** symbol next to it, you can tap this to add the product to the list.

You can search for a product (Backoffice only). To do this, select the **Magnifying Glass** icon on the **Product Comparison List**. An input box will appear. Enter either a barcode, or a description. As you type, up to 10 products that match will be displayed. If you see the one you wish to add to the list, you can either click on it to add it to the list, or you can select it with the keyboard using the up and down arrow keys, and the enter key. The search is limited to items in stock on the till.

The search will match any sequence of letters you put in, but it doesn't have to be an exact match. For example, if you type in 'tom', you might match **tomato** ketchup, **tomatoes**, and **Tom** and Jerry Candy. You can widen the search to include anything with the word 'tom' in it at any point. To do this search for %tom. This, for example, might match Baxters Cream of **Tomato** soup.

To remove a product from the **Product Comparison List**, select the **[-]** icon next to the product.

15. SYMBOL CS 3000

To create an order. Scan a product using the **+** button on the scanner.

Each time you scan a barcode, one of that product will be added to the order.

If the wholesaler only supplies that product by the case or a minimum number then one case or one minimum amount will be added.

If you scan a barcode using the **-** button on the scanner then the last instance of that barcode will be deleted from the order.

When the order has been created place the scanner in its cradle and the order will be sent to the till. The scanner will make a two tone beep when it starts sending an order and the till will play a melody when it has received the order successfully.

Note. Do not put the scanner into the cradle until you have completed your order as it will be sent to the till as a completed order.



OrderMaster Via Toshiba ST-A10/20

Editing and sending your order. To view your order on the till select **Other Functions** then **OrderMaster**.

Any orders that you have sent will be in Held Orders.

Select **Held Orders** then in the pop up box select the arrow for Create Order from. Then touch the required order.

Now select your wholesaler in the same way. Select the arrow or Select a Wholesaler and select the wholesaler. Now select **Next**. Your order will now be displayed and you can edit the quantity ordered before creating the order to send.

Touch the quantity you want to change. A number pad will appear where you can select the number required and press **Submit**.

Below the order will be a list of products that are not supplied by the wholesaler.

When you have finished editing select **Create Order**. The order will now be in your Current Orders list. When you have sent an order it will move to Historic Orders

Amend an Order To amend an order touch **Order to be Amended**. It will change to yellow and offer the option to Amend or Prepare. Touch **Amend** then touch the item to be amended and press **Select Item**. You can now alter the amount ordered and press **Save** or **Delete** the item.

Print Order While you are in the amend screen you have the option to Print Order. This will print on the laser printer attached to the till.

Send an Order To send order touch **Prepare Order**. The till will then prepare the order to send to the wholesaler. Select **Yes** and the order will attempt to go. If the order fails to go it will be in Historic Orders and highlighted as **Unsent Orders**. Touch **Unsent Orders** and any unsent orders will be displayed. The order will attempt to go every five minutes or you can send the order manually by pressing **Attempt to Send Order**

16. Opticon Handheld Scanner

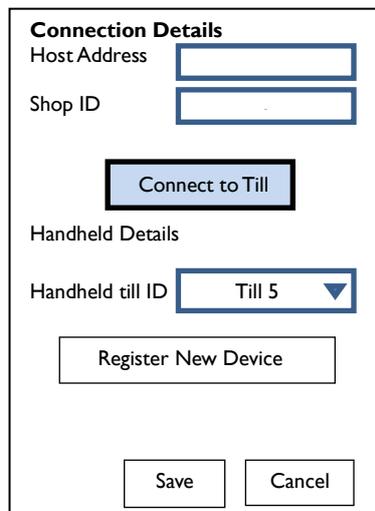
Shopmate Lite



16.1 Getting Started.

Switch on the Opticon by pressing the red button on the top. Select the start icon at top left of screen followed by the SMLite Icon. After a couple of seconds the 'Connections Details' screen will appear.

(Normally only on first time of use)



Please use the help function on the screen if you are unsure what details to fill in.

Next select [Connect to Till](#) then [Save](#). The screen opposite should appear.

16.2 Stock Control

Make a 'Stock Take Group' (Stock Take Only)

Once you have made a 'Stock Take Group' you can assign several different sessions of stock taking to the group and then commit the group.

This means that more than one person can do a stock take at any time.

When you commit the group, you will update your system with the new information. This can be viewed in the relevant reports.

To carry out the Stock Take, select [Stock Take](#) from the drop down box, then [New](#).

You will then be asked for a description of the Stock Take Group. Complete the required field and select OK.

Important

A 'snap shot' of stock is taken when you create a Stock Take Group. Your discrepancy report will use this 'snap shot' as its base. The Stock Take group should therefore be made as late as possible.

When you have pressed OK, you will see the Stock Take Group that you have just created.

You need to assign the stock take sessions to the group. To do this select [group name](#) to highlight the group, you will then see several buttons appear in the centre of the screen.

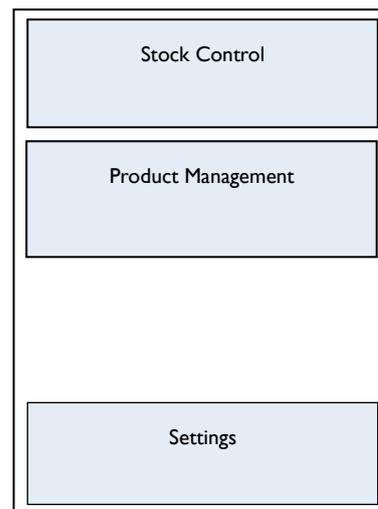
Select [Add](#) to create a Stock Take session. The time and date will be displayed.

If you highlight the date and then select [Edit](#), a new screen will appear for you to scan a barcode.

Enter the quantity and select [Update](#).

You are now ready to scan the next product.

When you have finished your stocktake session select [Back](#).



Scan



To add more products to the session touch the [Time and Date](#) of the session again and select [Edit](#). You can now continue to scan products and enter the amount of stock you have. Once you have finished all sessions, select [Commit](#).

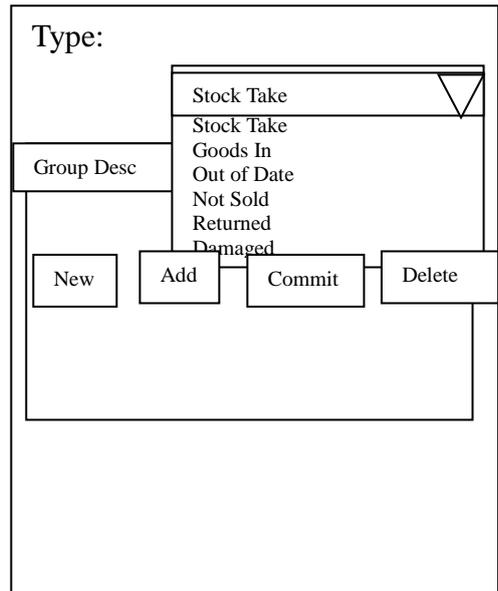
If you make a mistake, delete that product line by touching and holding the line you want to delete until you are offered the option of deleting the line.

When you have finished editing a group of sessions, select the group and select [Commit](#). You will be asked if you are sure you wish to Commit this Stock Take Group. Only then will your figures on the till be updated.

You can print that stock session report by selecting the [Print Stock Session](#) button on the till or [Back Office](#).

The Stock Take figures will *overwrite* the existing stock figure in the system. This is unlike any other of the stock management functions on the hand held scanner or the till system. This means that it is much easier to do the stock take when the shop is not open to customers, so that the figures that you enter are not changed due to a customer having removed a product from the shelf but not yet paid at the till.

In Stock Control you can also perform Goods in, Remove Out of Date stock, remove stock that is not selling, stock that is being returned to a supplier or stock that is damaged. Select Stock Control, touch the drop down box by Stock Take and touch the function you require. Then either select a supplier that you have been using or select [New](#) and choose a supplier from the drop down box. You can now start scanning barcodes. Fill in the appropriate field and select [Update](#) to update your stock.



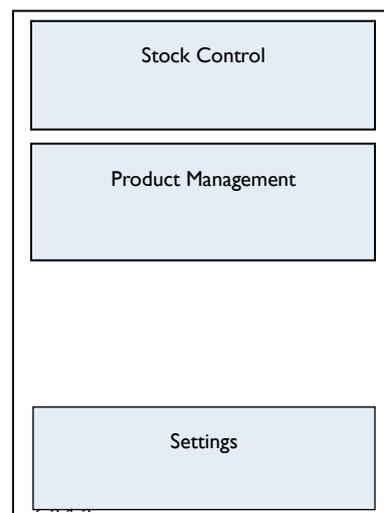
16.3 Product Management

There are a number of important points about adding new products. These are summarised here:

- When adding the description of a product, think about how you (or another member of staff) will re-order it when it starts to run out. Give enough detail to identify it easily e.g. weight, volume etc. If it is a soft drink do **not** just enter the description 'pop'.
- Although there are some essential fields that must be entered when adding a new product, it is helpful to enter as much information as possible, such as pack size, pack cost etc. For example, if you operate a pricing policy that is based on the cost price of products, pack size and cost are vital to you, even though they are not shown as essential fields in ShopMate.

- The essential fields that you **must** enter are:
- Barcode
 - Product description
 - Retail price
 - VAT status

Without these fields you will not be able to complete the entry.



16.3.1 Editing a Product

Select [Product Management](#) from the main screen. You can then scan a product or type in a barcode.

In this screen you can change the description, pricing and stock details of the product.

The functions available to you are shown below. When you have finished entering any information select [Save](#) at the bottom right of the screen.

If at any time you select [Add](#), ShopMate will apply the information for the till to use. When you have finished with the Product Management screen select [Back](#).

Details	Pricing	Stock
Barcode: <input type="text"/> <input type="button" value="Go"/> Description: <input style="width: 100%;" type="text"/> Category: <input type="text"/> <input type="button" value="▼"/> User Cat: <input type="text"/> Item Size: <input type="text"/> Age Check: <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Outers: <input type="text"/> <input type="button" value="Add"/>	Barcode: <input type="text"/> <input type="button" value="Go"/> Description: <input style="width: 100%;" type="text"/> VAT: <input type="text" value="20% - Standard rate GB"/> <input type="button" value="▼"/> Unit RRP: <input type="text"/> PM: <input checked="" type="checkbox"/> Pack Cost <input type="text"/> Item Co <input type="text"/> Pack Size: <input type="text"/> GM <input type="text"/> Price: <input type="text"/> Calc As <input type="text"/> Pence over RRP <input type="button" value="▼"/> <input type="button" value="Already In label list"/> <input type="button" value="Quick print"/>	Barcode: <input type="text"/> <input type="button" value="Go"/> Description: <input style="width: 100%;" type="text"/> Wholesaler: <input type="text"/> <input type="button" value="▼"/> Prod Num: <input type="text"/> Stock: <input type="text"/> +/- Stock: <input type="text"/> Order Freq: <input type="text" value="7"/> <input type="button" value="Select a type"/> <input type="button" value="▼"/> Min Qty <input type="text" value="0"/>
<input type="button" value="Details"/> <input type="button" value="Pricing"/> <input type="button" value="Stock"/> <input type="button" value="Save"/>	<input type="button" value="Details"/> <input type="button" value="Pricing"/> <input type="button" value="Stock"/> <input type="button" value="Save"/>	<input type="button" value="Details"/> <input type="button" value="Pricing"/> <input type="button" value="Stock"/> <input type="button" value="Save"/>

16.3.2 Details Tab

If you scan a product and select the [Details Tab](#) you will be able to see the barcode you have scanned. You could also enter a barcode and select [Go](#). The description of the item will be displayed under the barcode. The product category is displayed next, with the option of putting the product into one of the categories you have created.

Categorisation - can be swapped between an RDP category and a User category. The default is set to the categories set by TRDP and is titled RDP. You will need to set up your categories before you can manage them locally. See section 11.1 of the manual.

Item Size - will be set by TRDP if we have the information. You can select the [Item Size](#) box by touching it and alter it using the software keyboard. This is selected by touching the keyboard icon at the bottom of the screen in the middle.

Age Check - is set by us depending on the product category.

Outers - Outer barcodes can be added to a product by selecting [Add](#) and then [entering](#) or scanning a barcode.

16.3.3 Pricing Tab -

In this tab you can set the VAT level, adjust cost information and selling price. You can also set how that price is achieved. Select the appropriate box and use the physical keypad on the Opticon. From the moment you change the price on your Opticon and select [Save](#) at the bottom right of the screen, the new price will apply to all new sales of that item on the till.

The Pricing Tab also enables you to change the method of pricing that you use. Select the down arrow at the end of the [Calculated As](#) section to see the ways in which you can manage your prices. The default method is described as Set Amount. In this mode, if you change a price, the system will not change the price again unless YOU change it. This is true even if the RRP or the cost price is changed in the file sent to us by your wholesaler. NOTE: If you want to price your products in relation to their cost price, or as a gross margin, you will not be able to do so if you have not added cost data for the product.

If you decide to use one of the other options for managing your prices, for example, % over RRP, then, when the RRP on that product is altered by the wholesaler, the system will automatically change the price according to the percentage over RRP that you have set when that new price reaches your tills. You need to be alert to all price changes that come through to your system otherwise your shelf edge labels will not be correct. To keep up with price changes, you need to look at the Price Change report frequently, and change the relevant shelf edge labels. Don't forget to save any changes to add them to the till.

Shelf Edge Label - You can select [Print Quick Label](#) to print a label from the receipt printer. You can also select [Add to Label List](#) to print on the laser printer when you have a list of 21. See section 13 of the manual for printing shelf edge labels.

The different options for managing your prices are:

% over RRP

% of RRP

pence over RRP

pence over Cost

% of Cost

% Gross Margin

Set Amount (default mode)

If you select any of the above options, the appropriate calculation will be done and the selling price put into the Price box. See the section in the manual on 'Managing prices the ShopMate way' for more information about different methods you can use for managing your pricing.

16.3.4 Stock Tab Here you can make changes to the following sections:

Wholesaler - You can select any wholesaler you have been assigned. See the manual section 11.2

Product number - Select the box and use the physical keyboard to enter the Product Number.

Stock – Will show the stock the till calculates is held.

The stock will be altered if you put a number in the **+ / - Stock** box. Then, using the down arrow, select the reason the stock is being altered. The options you have are - *Stock Take, Goods In, Damaged, Returned, Not Sold, Out of Date*

Order Frequency - Here you can set the frequency that you order from your wholesaler. The default is once a week. ShopMate will then use this along with a number of other criteria to work out a suggested order list.

Minimum Quantity – Here you can set the quantity of a particular product you want your stock to reduce to before it goes on to your reorder report.

17 Back Office Operation

This section contains brief details on how to use the ShopMate 'Window on the Till' back office computer that links to the tills on the counter. Whilst the screens on the tills are operated through the touch screen, the process of selecting items is done by using the mouse on the back office computer.

The main screen gives you the options:

1. Other Functions
2. Messages
3. Reports
4. Products & Prices
5. Promos
6. Accounts
7. User Management
8. OrderMaster
9. Manual

17.1 Other Functions

If you select this option, you are given the opportunity to enter two different sections:

- a. Category Management
- b. Wholesaler details

17.1.1 Category Management

This function allows you to set up your own product categories, so you can manage your product file in categories (or departments) that suit you best. TRDP has already set up a price file with our categories. It would be sensible to leave these in place for a while before you begin changing them, so you can get used to them and make informed decisions about whether or not to alter them. When you do decide to change them, enter this function by selecting [Category Management](#). The screen will give you the option to [Add New](#). When you select this, you are given the options:

- i. [Back to Category List](#)
- ii. [Add New](#)
- iii. [Save Current](#)
- iv. [Delete Current.](#)

To enter the name of a new category, click the cursor in the rectangle after [Category Name](#) and use the keyboard to enter the name in the rectangle. To save this new category, select [Save Current](#). If you now select [Back to Category List](#) you will see that the category you have just added is shown in the [Category List](#). To delete a category, go back to the [Category list](#), select the category you want to delete, by selecting the Green [Pick](#) button next to it, then selecting [Delete Current](#). The list will disappear.

17.1.2 Wholesaler details

You might want to use these when you are entering new product details or editing product details. From the [Other Functions](#) button, select [Wholesaler Details](#). You will see a list of wholesalers that TRDP has entered on your system. None of these contains address details etc. To add details to any of the wholesalers on the list, select [Pick](#). The system will now display address, telephone number, postcode etc. fields for you to complete.

Useful tip. When you are entering details, and you wish to move between fields, use the [TAB](#) key to move to the next field. (The [TAB](#) key is the one to the left of the [Q](#) key.) When you have entered the details, select [Save Current](#).

Deleting wholesalers is done by 'picking' one then clicking on [Delete Current](#).

17.1.3 Reports

This section of the Back Office works in the same way as the tills except that you use the mouse to click on buttons rather than touching the screen. The only difference is that Historical Transactions is not available.

17.1.4 Products & Prices

If you select this option, you will have three buttons to choose from, [Add New Product](#), [Edit Product Details](#), and [Change Price](#).

17.1.5 Add New Product.

When you select this option, the screen will prompt you to enter a barcode. You need to key this in from the keyboard. Then select the [Return](#) key on the keyboard.

Click with the mouse in the [Description](#) rectangle, and the cursor will flash. Key in the product description as you want it to appear in the database. Then either press [Return](#) or click on the next option, which is [Value Added Tax](#). Click on the small square at the right of the rectangle in the VAT box to see and select the correct level of tax.

Then click in the [Marked Up Price](#) rectangle, and **enter the price in pence. Do Not enter any decimal points in the price.** At this stage you can [Save](#) what you have entered.

However, by selecting [Show Advanced Options](#), you can also enter additional information about the product, such as the:

2. category you want it to appear in,
3. wholesaler you want to associate with it,
4. cost price
5. pack size
6. the minimum stock level you want it to have before re-order.

When you click on [Show Advanced Options](#) the description you have already entered is shown. Below that you have the option to select a product category. If, when you click on the drop-down options of categories, you cannot find the right category, you can add a new category by clicking on [Edit](#) product categories. Having added a new category, you can get back to this screen.

The next set of details is the [Wholesaler information](#), where you can select the wholesaler that supplied the product, and enter the wholesaler's product number. You can also [Edit](#) wholesaler details if required.

Click on the [Down](#) key, or use the scroll bar to move down to additional options, where you can enter the pack size and pack cost of the product. Do not enter a decimal point in the price field. The unit cost is worked out automatically from the pack cost and pack size fields.

You can enter a [Recommended Retail Price](#) if this differs from the [Marked Up Price](#) which is the actual price that you sell at.

IMPORTANT!!! In the [Marked Up Price](#) section, it is possible to enter prices to be calculated in a number of different ways. The default method is [Set Amount](#) which means that the price you entered will remain the same until you alter it. You can, however, use different methods to select the selling price. Click on the drop-down square to see the different methods, which are:

Pence over Cost (the cost price plus x pence, where x = the figure you enter. The price will change when the cost price changes.)

Pence over RRP (the RRP plus x pence, where x = the figure you enter. The price will change when the RRP changes.)

% Gross Margin (giving you a set level of gross margin, which you need to enter. The price will change when the cost price changes.)

% of Cost (The price will change when cost changes. You need to enter the % you require e.g. 120%)

% of RRP (You need to enter the percentage. The price will change when the RRP changes.)

% over RRP and **% over Cost**. These are self explanatory.

Select the option you want. If you are adding a number of products, the system will default to the *last option you selected*. This means that if you always use the same method, you will not need to select this option every time you enter a product.

The last option to decide on is the [Minimum quantity before Re-Order](#) where you can set the level of stock at which you want the system to suggest a re-order. Then click on [Save](#). The details will be saved to the database.

17.1.6 Messages

This is the same as on the till. See section 8.6

17.2 Edit Product details

When you click on this button the system gives you a number of different ways to search for the product:

- Description
- Barcode
- Product number
- Category
- Pack size

You can also tell the system to look for products 'beginning with' 'ending with' 'containing' or 'equal to' the information you enter into the information box.

If you know it is supplied by a particular wholesaler, you can limit the search to the products from that wholesaler.

The final option you need to consider when you are searching for a product is whether you want to search the 'Entire price file' or 'Stock Items only'. Searching the whole price file will take longer. The 'Stock Items only' option means that the search is carried out only on the items that are stocked in your outlet(s).

Once you have carried out the search, the list of products found is displayed on the screen. At this stage, you can refine the search further by adding more information into the search box. Alternatively, if you have identified the product you want to edit, click on the blue product description. At this point you will see the same screen layout as you saw when Adding a New Product.

If you move back from this screen to the search list, the product you have been working on will be highlighted in yellow.

17.3 Change Price

The [Change Price](#) function operates in the same way as it does on the tills, except for the fact that you can search for the product in a number of different ways (see Edit Product Details above.) Also, you have to key in the barcode of the item being changed, and you use the mouse instead of the touch screen. After Change Price the following functions all work in the same way as on the till: Shelf edge labels; Check Stock Level; and Adjust Stock.

17.4 Shelf Edge Labels

Here you can print shelf edge and promotion labels in the same way as the till. See section 10.2.3

17.5 Promotions.

If you wish to enter promotions, click on the [Promos](#) button. You will be prompted to select a period for the promotion. At this stage you can either enter the dates for a new promotional period by clicking on [Add New Promotions Period](#) or clicking on the small square in the rectangle to open the drop-down box that shows you the available promotion periods already on the system.

If you click [Add New Promotions Period](#) then [Set Dates](#), the screen will display a calendar for you to select a start date. When this has been selected another calendar will be displayed for you to select an end date. Please NOTE that the dates are inclusive. When you have selected the dates, select [SAVE](#) to save your new promotions period.

Then click the promotion period that you want to use by dropping down the promotions date box (click down arrow) and clicking the required dates, then click [GO](#). The [View Promotions](#) screen displays. To add a promotion, click on [Add Promotion](#). The [Add Promotion](#) screen displays. At the top of the screen it shows the Type of promotion that will be added. To see the choice of promotion types, click [Change](#).

The different options are:

Buy One Get One Free

Multibuy – e.g. three cans of Coke for 85 pence

Multibuy – e.g. any four of these five different chocolate bars for 99 pence

Reduced to – e.g. price reduced from x to y.

Buy No. Get One Free – e.g. Buy N of a range of products, and get the most expensive one of N for a specific price. For example, if you had five products in the promotion, priced at 39p, 49p, 59p, 69p, & 79p, you could set the most expensive one to sell at 40p. Alternatively, you could set the cheapest one to sell at a different price, say, 15p.

Linked Promotion – e.g. buy two bottles of shampoo, and get Hair magazine for £1.00(P) where P could be zero.

Select the promotion type you require, by clicking the [Pick](#) square next to it. The screen will display the boxes into which you need to add details. The first box needs a description of the promotion. This is what you will see on the screen of the till.

NOTE: The different types of promotion require you to complete different boxes on the screen. It is very important to remember that, if you enter any barcodes, you **MUST** click on the [Add](#) square to the right of the data entry box to add the barcode to the promotion details. Then, when you have entered all the details of the promotion, click [Save](#). Occasionally a barcode will be added that is not on your till. You will be asked if you would like to [Add it Anyway](#). If you click [Yes](#), the promotion will work for that barcode as soon as it is added to your till.

You can review the promotions you have entered by clicking [Back](#) at the top right corner of the screen. If you then click the promotion description, it will bring up the promotion which can be edited and new products added. You can also see a detailed report by clicking on [View Report](#).

To delete a promotion, go to the list of promotions in a particular promotion period and tick the box under [Rem](#) then click [Remove Promotion](#).

17.6 Accounts

To set up a new account or edit an existing one go to section 11.3 of this manual

17.7 User Management

To set up new users or edit existing users go to section 5.2 in this manual.

To set privileges for a user go to section **5.3** in this manual.

17.8 OrderMaster

Till Interface

From the main menu select [OrderMaster](#)

Any Orders waiting to be sent will be under [Current Orders](#)

When you have attempted to send an order it will move to [Historic Orders](#)

To amend an order touch [Order to be Amended](#). It will change to yellow and offer the option to [Amend](#) or [Prepare](#)

Touch [Amend](#) then touch the item to be amended and press [Select Item](#).

You can now alter the amount ordered and press [Save](#) or delete the item.

To send order touch [Prepare Order](#) touch [yes](#) and the order will attempt to go.

If the order fails to go it will be in [Historic Orders](#) and highlighted [Unsent Orders](#)

Touch [Unsent Orders](#) and any unsent orders will be displayed.

The order will attempt to go every five minutes or you can send the order manually by pressing [Attempt to Send Order](#)

18. Local Loyalty Scheme (optional extra)

Functionality. Customers can collect and redeem points by having their loyalty card scanned during a transaction. Customers can link to your 'micro' site and view offers, promotions and messages created by you. The site can also be branded to your own specification. For every £1 spent in store 1 point is awarded to the customer. (This amount can be altered.) The shop's micro site can be accessed by any smart phone, tablet or computer.

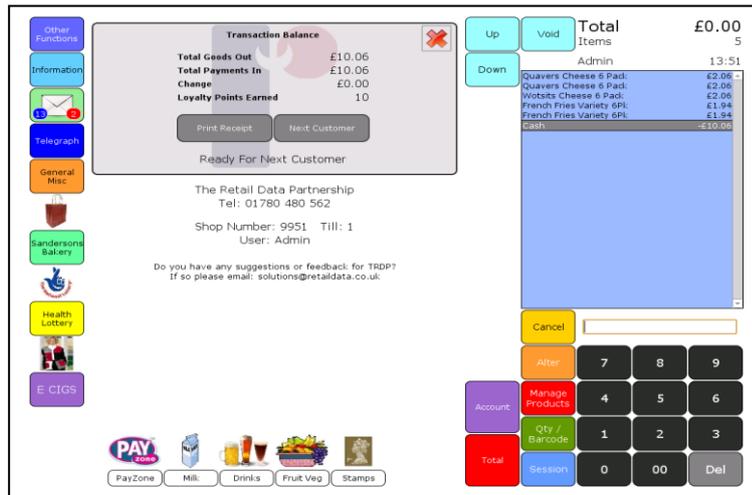
After joining the loyalty scheme shops will be provided with loyalty cards with QR Codes on them to give out to customers. The first time this is scanned the customer will need to register their details. A text message will be sent to those who register with a mobile number. For customers who do not have a mobile phone a url address will be printed on the loyalty card.

The screenshot shows a POS interface with a modal dialog for registering a new loyalty member. The dialog has a red '18' icon and a warning: "Please make sure the Loyalty applicant is at least 18 years old." Below this, it says "Enter the details of the new Loyalty customer:" and provides input fields for "First Name" (containing 'S'), "Last Name" (containing 'Robson'), and "Mobile / Home Telephone". There are "OK" and "Cancel" buttons at the bottom of the dialog. The background shows a transaction screen with a total of £11.95 and a list of items including "Admin" for 13.50 and "Quavers Cheese & Pack" for £2.06. A keyboard is visible at the bottom of the screen.

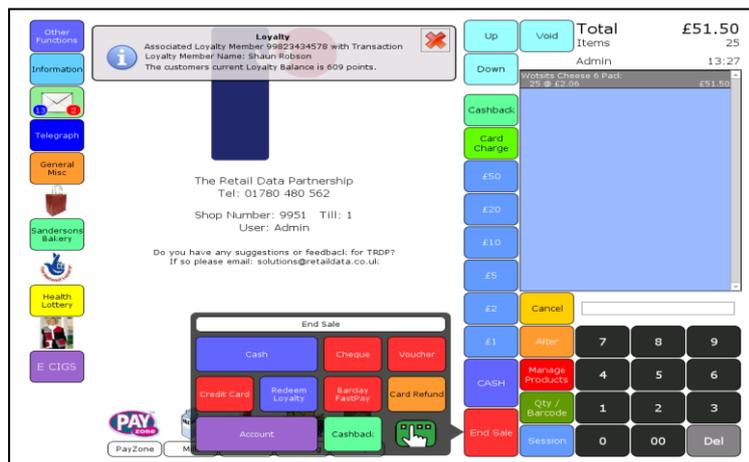
Scan items as normal then scan the customer's loyalty card. This must be done before the transaction is completed. An alert will appear before finishing off a transaction asking if the customer's loyalty card has been scanned. When the loyalty card is scanned the balance will appear at the top of the screen.

The screenshot shows a POS interface with a transaction screen. The total is £4.12. A loyalty alert is displayed at the top, indicating the customer's current balance is 10 points. The screen shows a list of items, including "Quavers Cheese & Pack" for £2.06. A keyboard is visible at the bottom of the screen. The interface includes various function buttons such as "Other Functions", "Information", "Telegraph", "General Misc", "Sandersons Bakery", "Health Lottery", "E CIGS", "PAY", "Milk", "Drinks", "Fruit Veg", and "Stamps".

The transaction can then be completed as normal, at which time a receipt can be printed showing how many points have been awarded and how many points the customer has accrued.



To Redeem points scan the items as normal and press the **Total** button. Then press the **End Sale** button followed by the **Redeem Loyalty** button.



The customer can then decide how many points to redeem against the transaction, 50 points amounts to 50p, 100 amounts to £1 etc.



The transaction can now be finished as normal with the receipt displaying the new loyalty balance.

The screenshot displays a POS system interface. On the left is a vertical menu with icons for 'Other Functions', 'Information', 'Telegraph', 'General Misc', 'Sandersons Bakery', 'Health Lottery', and 'E CIGS'. At the bottom left are icons for 'PayZone', 'Milk', 'Drinks', 'Fruit Veg', and 'Stamps'. The main area features a 'Transaction Balance' window with a close button (X) and the following data:

Transaction Balance	
Total Goods Out	£51.50
Total Payments In	£51.50
Change	£0.00
Loyalty Points Earned	51

Below the balance window are 'Print Receipt' and 'Next Customer' buttons, followed by the text 'Ready For Next Customer'. Further down, the shop information is displayed: 'The Retail Data Partnership', 'Tel: 01780 480 562', 'Shop Number: 9951 Till: 1', and 'User: Admin'. A feedback prompt asks: 'Do you have any suggestions or feedback for TRDP? If so please email: solutions@retaldata.co.uk'. On the right, a receipt window shows a total of £0.00 at 13:48. The receipt items are:

Items	25	Total	£0.00
Admin			
Wotsits Cheese 6 Pack			
25 @ £2.06			£51.50
Loyalty Redemption			-£51.50
Cash			£51.00

Below the receipt is a keypad with buttons for 'Cancel', 'Alter', 'Account', 'Total', 'Manage Products', 'Qty / Barcode', 'Session', and a numeric keypad (0-9, Del).