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ChainStorePlus Application Package

User Operation Manual (v7.0)

Edition v1.2 (d202003)
<The Master Tables>

The Book Two (2) Master Tables



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SECTION 5 MASTER FILES MAINTENANCE

5.1 Supplier Master

5.1.1 Supplier Master Maintenance

Supplier Master Maintenance allows user input detail information about a supplier for processing purpose.

Fig 1. – Summary Page

Can be either sort by Supplier Code or by Supplier Name:



Supplier Code	Name	Last Modified Date	Last Modified User
1003032	C E C CATERING EQUIPMENT CO LTD		sx1
1003323	KING ASIA MARINE PRODUCTS CO LTD		sx1
1003324	KOLB (HK) LTD		sx1
1003325	HOP LOONG HONG		sx1
1003326	WAH FONG TEA CO		sx1
1003328	IMPEX QUALITY PRODUCTS LTD		sx1

Fig 2. – Folder Page 1 of Detail Input Page

Double click the row will lead to Detail Modification Page as follows:

<u>Prompt</u>	<u>Description</u>
Supplier Code	X(8) - Must field - a particular supplier
Supplier Name	X(150) - Must field - a supplier name in English
Chinese Name	X(150) - Optional field - a supplier name in Chinese
Attn.	X (20) – Optional field - Person to be attended to in this supplier
Address Line	X (30) x 4 - Optional field - Supplier's delivery address
City	X (20) - Optional field - City for the delivery address
Country	X (12) - Optional field - Country for the delivery address
Postal	X (08) - Optional field - Postal for the delivery address

State	X (04) - Optional field - State for the delivery address
Country Code	X (02) – Optional field - Country for the delivery address that is pre-defined in ‘Country Code Maintenance’ -
District Code	X (03) – Optional field - District code for the delivery address that is pre-defined in ‘District table Maintenance’

Fig 3. – Folder Page 2 of Detail Input Page

The screenshot shows a software interface for 'Supplier File Maintenance (MF1000)'. At the top, there are navigation buttons: 'ChainStore' (with a logo), 'Save', 'Clear', 'Validate', and arrows for navigating between pages. On the right, there are links for 'Back', 'SX1 Admin User', and a menu icon. The main area has a blue header bar with the title 'Supplier File Maintenance (MF1000)'. Below this, there are several input fields: 'Supplier Code' (1005729), 'Supplier Name' (FOUNTAIN FOOD PRODUCTS LTD), and 'Chinese Name'. A section titled 'Contact Information' contains five sets of fields for Phone No. 1 through 5, each with fields for '(Country)', '(Area)', '(Tel. No.)', and '(Extension)'. Below this, a 'Person Contact' section includes 'Title' (Testing manager), 'First Name' (Tai Man), and 'Last Name' (Chan). A blue oval highlights the 'Page 2' tab at the top of the contact information section.

Prompt	Description
Country	X(10) x 3 - Optional field - a country code
Area	X(8) x 3 – Optional field - an area code
Tel No.,	X(30) x 3 – Optional field - a subscriber number
Extension	X(15) x 3 - Optional field - a extension number
Telex No.	X(25) - Must field

- a teletypewriters connected number by wire through automatic exchanges

Title	X (80) - Optional field - the contact person's position title
First Name	X (30) - Optional field - the contact person's first name
Last Name	X (30) - Optional field - the contact person's last name

Fig 4. – Folder Page 3 of Detail Input Page (Middle Part)

The screenshot shows the 'Supplier File Maintenance (MF1000)' application interface. The top navigation bar includes 'ChainStore', 'Save', 'Clear', 'Validate', and page navigation buttons ('Page 1' to 'Page 5'). The main area displays supplier details: 'Supplier Code' (1005729), 'Supplier Name' (FOUNTAIN FOOD PRODUCTS LTD), and 'Chinese Name'. Below this is the 'Credit Information' section, which includes fields for 'Credit Limit' (0.00), 'Credit Term' (90 Days), 'Payment Term' (Normal), 'Supplier Type' (Owner ID: HQ), 'Currency' (HKD), and discount fields (Discount1: 20.00, others: 0.00). A tooltip box labeled 'The Credit Term in # of Days' points to the 'Credit Term' field. A dropdown menu for 'Payment Term' is open, showing options: 'Normal' (selected), 'B - Cash Before Delivery', 'C - Cash On Delivery', and 'M - Month End Date'. A tooltip box labeled 'Optional field for Payment Method input' points to the 'Payment Term' dropdown. The bottom left contains a note about 'The Credit Limit'.

The Credit Term in # of Days

The Credit Limit. This is input amount to indicate the Max. Total Credit is allowed by the Supplier

Optional field for Payment Method input

Fig 5. – Folder Page 3 of Detail Input Page (Bottom Part)

The screenshot shows the 'Supplier File Maintenance (MF1000)' page. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. The top right shows 'SX1 Admin User'. Below the header, the supplier code is '1005729' and the name is 'FOUNTAIN FOOD PRODUCTS LTD'. A 'Chinese Name' field is empty. The page is divided into five tabs: Page 1, Page 2, Page 3 (highlighted with a blue circle), Page 4, and Page 5.

Credit Information: Includes fields for Credit Limit (0.00), Credit Term (90 Days, -Normal), and Payment Term.

Purchase Information: Includes fields for Supplier Type, Owner ID (HQ), Currency (HKD), Price Group (0), and Discount levels (Discount1: 20.00, others: 0.00). A dropdown menu for 'Discount Level' shows options: Reference Only, H - Default Header Level (selected), I - Default Item Level.

Annotations:

- Currency:** This is the default currency for this Supplier in use of Purchase Order and can be override by user in Purchase Order Maintenance Process on demand.
- Owner ID:** This is the "User" who responsible for this Supplier in the Company.
- Discount:** This is the default general Discount offered by the Supplier. The Discount has up to 5 discount rates and to be calculated in input sequence as "discount on top of other discount" mechanism in Purchase Order Processing as default. The Discount is calculated based on Retail List Price of the product.
- Discount Rate:** This is indicated how the "Discount Rate" to be handled :
 - H - Default the discount rate in Purchase Order's Header Level;
 - I - Default the discount rate in Purchase Order's Item Level;
 - or
 - the discount rate is for Reference only – No calculation;

Fig 6. – Folder Page 4 of Detail Input Page

The screenshot shows a software interface for 'Supplier File Maintenance (MF1000)'. At the top, there are buttons for 'Save', 'Clear', 'Validate', navigation arrows, and user information ('SX1 Admin User'). Below the header, the 'Supplier Code' is set to '1005857'. The 'Supplier Name' is listed as 'A & W FOOD SERVICE LTD'. There is a field for 'Chinese Name'. A navigation bar at the top indicates this is 'Page 4' of a five-page form. The main content area is titled 'Internet Information' and contains fields for 'Email Address' and 'Web Site'. Below this is a 'Remarks' section with three lines for notes. At the bottom, there is an 'Important Date' section with a field for 'Open Date' and a calendar icon. A red circle highlights the 'Open Date' field. A callout box points to this field with the text: 'It is free to use the for own analysis purposes by own developed reports or tools.'

Prompt

Email Address

Description

X(40) - Optional field
- a contact email address

Web Site

X(4) – Optional field
- a online website

Fig 7. – Folder Page 5 of Detail Input Page

The screenshot shows a software interface for 'Supplier File Maintenance (MF1000)'. At the top, there are navigation buttons: 'Save' (highlighted in orange), 'Clear', 'Validate', and arrows for navigating between pages. On the right, it says 'SX1 Admin User'. The main area has a blue header 'Supplier Name' with the value 'A & W FOOD SERVICE LTD'. Below this is a 'Chinese Name' field. A progress bar at the top indicates 'Page 1' through 'Page 5'. The 'Settlement Information' section contains fields for 'Bank Code', 'Bank Name', 'A/C No.', and 'Settle By'. The 'Extra Information' section contains fields for 'CRM ID', 'Remarks Line 1', 'Remarks Line 2', 'BR#', and 'Salutation'.

<u>Prompt</u>	<u>Description</u>
Bank Code	X(20) - Optional field - a settlement bank code
Bank Name	X(30) – Optional field - a settlement bank name
A/C No.	X(10) – Optional field - a bank account number
CRM ID	X(20) – Optional field - Refer to the identity number in customer relation management system
BR	X(20) – Optional field - Business Registration number
Salutation	X(30) – Optional field

5.1.2 Supplier Delivery Address

Supplier Delivery Address Maintenance allows user input detail information about delivery address of the supplier for processing purpose.

Objective :- Maintain general information of particular supplier delivery address

- Function :-
1. Create Record
 2. Modify Record
 3. Delete Record
 4. View Record
 5. Copy Record as new
 6. Find Record
 7. Sort by header
 8. Adjust column indication

Screen Display :

The screenshot displays the 'Supplier Delivery Address Maintenance (MF1003)' application window. At the top, there are standard system buttons: Save, Clear, Validate, Back, and a user identifier 'SX1 Admin User'. The main area contains the following data entry fields:

- Supplier Code:** 9-DOGS
- Del. Addr. Code:** D01
- Attn.:** Mr. Chan
- Address Lines:**
 - Address Line 1: Flat D, 33/F Quick Tower
 - Address Line 2: 99 Cane Road
 - Address Line 3: Hong Kong
 - Address Line 4: (empty)
- City:** Central
- Country:** HONG KONG
- City Code:** Cent
- Country Code:** HK
- District Code:** I

Prompt

Supplier Code

Description

X(8) - Must field
- a particular supplier

Del. Addr. Code

X(3) - Must field
- a unique code that indicates a particular delivery address for the particular supplier

Attn.

X (20) – Optional field

	- Person to be attended to in this supplier
Delivery Address	X (30) x 4 - Optional field - Supplier's delivery address
City	X (20) - Optional field - City for the delivery address
City Code	X (4) - Optional field - City code for the delivery address
Country	X (12) - Optional field - Country for the delivery address
Postal	X (08) - Optional field - Postal for the delivery address
State	X (04) - Optional field - State for the delivery address
Country Code	X (02) – Optional field - Country for the delivery address that is pre-defined in ‘Country Code Maintenance’
District Code	X (03) - Must field - District code for the delivery address that is pre-defined in ‘District table Maintenance’

5.2 Item Master Maintenance

This is the most important and as well the Core Master Table in the system. This Master Items File will link up many important basic tables that discussed previously in this manual. This is a primary data set will be shared by many processes or subsystems in **ChainStorePlus**.

It is important for user to set up data correctly in this Item Master File.

The Item Master maintenance comes into different folders, basically, the first folder “Primary Input” is holding primary information must required by Item Master Table. All information in this primary folder is mandatory fields. Rest of other folders, may be secondary input, but still containing important data information to many users depending on business and operations.

Objective :- Maintain detail information of an item.

Primary Input Folder

Fig 1

The screenshot shows the 'Item Master Maintenance (MF0001)' screen. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. The main area is titled 'Primary Input' and contains fields for Supplier (1003331), Category (104), Sub Category (NK), and Stock Indicator (B - Buy Off Stock). Below these, there are sections for Description, Long Description (Primary), Short Description (Primary), Multi-Language, and various price fields. A red circle highlights the Stock Indicator dropdown. A callout box at the bottom left provides details: **Stock Indicator**: Details as below
- Must field

Fig 2

The screenshot shows the 'Item Master Maintenance (MF0001)' screen. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. The main area displays item details: Supplier (1003331 - DAH CHONG HONG LTD), Category (104 - Jewellery), Sub Category (NK - Necklace), and Stock Indicator (B - Buy Off Stock). Below this, there are fields for Long Description (Primary and Secondary) and Short Description (Primary and Secondary). A 'Dimension Control' section is highlighted with a red circle, showing options A, B, C, and D. A callout box points to this section with the text: **Dimension Control.** Details as below
- Must field.

Prompt

Item Code

Description

X(14) - Must field

- a unique code which defines a particular item

Category Code

X(05) - Must field

- a code which is pre-defined in Category master file

Sub. Category

X(05) - Must field

- a code which is pre-defined in Category master file and belongs to the category code above

Supplier Item Code

X(10) – Must field

- an item code for the same item which is defined by the supplier

Long Description

X(40) x 2 - Must field (Secondary is optional)

- detailed item description

Short Description

X(20) x2 - Optional field

- short item description

Multi-Language Button	This is a button use in case of user input other language description as a supplement data. Some selective documents such as sales memo could print in Chinese upon user request.
Dimension Control	<p>Combo selection - Must field Confirm at least one of the following selection:</p> <ul style="list-style-type: none"> • A - No Col & Size, • B - Col & Size, • C - Color Only • D – Inseam (optional for specific use only)
Size Category	<p>X(04) -Must field if Dimension Control is B, no need to enter this field otherwise</p> <ul style="list-style-type: none"> - Pre-defined Size table is required - The <u>“More Size”</u> Button” : more than one ‘size-category’ for one item is allowed
Stock Indicator	Confirm at least one of the following selections :

Stock Indicator	How to Use
B - Buy Off stock	User's own Inventory Stock. This is the most common use indicator for most of customer
C - Consignment Stock	The flag to indicate this is an Inventory Item do not own by User. Future calculation processing may be applied subject to optional module purchased
G – Package Set.	This flag indicated the Item is a Packaged Item which link to a pre-defined Item Table Set under specific process. ChainStorePlus back office system will break the Packaged Items sold in POS front end into detail product items based on the Item Table Set then write to Sales Journal as history in break down details. Please consult Sanyo Extended Business Consultant before use.
N – Special Handle Item	This is a special control flag for some custom made special process. Not for general usage. Please consult Sanyo Extended Business Consultant before use.
S – Coupon M & M Item	This is an Item specially created for Promotion Mix & Match calculation in POS processing. Must work with <i>Mix & Match Coupon Process Rule</i> under Mix & Match Promotion Module;
V – Service Item	This is to indicate that this Item is available for “Sell” in POS <u>BUT NOT</u> a countable stock therefore NO inventory movement under normal Stock Control process. The typical item examples are "Repair", Alteration Service",etc.;

Stock Indicator	How to Use
Size/Inseam Cat.	<p>X(04) - Optional field</p> <ul style="list-style-type: none"> - Only allow to be chosen when Dimension Control is “B” or “D” - Pre-define in Size Category Information
Define Color Code	<p>X(04) - Must field if Dimension Control is set to other than "A".</p> <ul style="list-style-type: none"> - Pre-defined color table is required. - The system will check on this color control in most of process and refuse color input if the color is not previously defined in this control table.
Retail Price	<p>9(07).99 - Optional field</p> <ul style="list-style-type: none"> - the retail list price of such item - this retail list price will be used for bar code label or price tag printing; - this input field is open to input only at creation mode. No retail list price modification is allowed once item is created. Price modification could only be accepted in “Mark up Mark down” process in the system;
Wholesale Price	<p>9(07).99 - Optional field</p> <ul style="list-style-type: none"> - the wholesale price of the item - this price may be used for customer invoicing process in Wholesales & Distribution Modules (an options of ChainStorePlus);

5.2.1 Price & Cost Folder

The Folder holds important prices and costs information of that item.

The screenshot shows the 'Item Master Maintenance (MF0001)' interface. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. On the right, there are links for Back, SX1 Admin User, and other system functions. The main area is titled 'Standard Price' and contains several input fields:

- Retail Price:** 499.00
- Wholesales Price:** 349.00
- Internal Price:** (empty)
- Price Group:** (empty)
- Wholesales:** (button)
- Standard Cost:** 289.00
- Average Cost:** (empty)
- F.O.B.:** HKD
- Currency:** (dropdown menu)
- Amount:** 0.00
- Consign:** (button)

Prompt

Retail Price

Description

9(07).99 - Optional field

- the retail list price of such item
- this retail list price will be used for bar code label or price tag printing;
- this input field is open to input only at creation mode. No retail list price modification is allowed once item is created. Price modification could only be accepted in “Mark up Mark down” process in the system;

The ‘Retail’ Button

this button will bring user into another input box for multi location prices input, such as different retail prices for different country, group, location, or even color & size.

The ‘Consign’ Button

this button will bring the Consignment Stock Cost Calculation Table for Consignment Stock Settlement Process

Wholesales Price

9(07).99 - Optional field

- the wholesales price of such item
- this price will be used for customer invoicing process in Distribution Modules (an options of **ChainStorePlus**);

The ‘Wholesales’ Button

this button will bring user into another input box for additional Wholesales prices input. up to ten(10) , different wholesales prices per item is allowed

The “Consign” Button

The Consignment Stock Cost Calculation Table for Consignment Stock Settlement Process

This Table is used ONLY for consignment stock cost settlement calculation for supplier. For user who does not use Stock Consignment Optional Module please ignore the table.

The screenshot shows the 'Define Consignment Stock Cost (MF0001)' dialog box. On the left, there's a list of fields: Item, Description, 1.Primary, Standard Price, Retail Price, Internal Price, Discount Ctrl ?, Max. Discount %, Cost, and a 'Consign' button. The 'Consign' button is circled in red. The main table has columns for Eff. Date, Location, % on List Price, % on Sell Price, and Fixed Amt\$. Row 1 shows '03/10/2022' and '198.00'. A dotted circle highlights the '% on List Price' and 'Fixed Amt\$' columns. Below the dialog box, four callout boxes provide detailed explanations:

- The Effect Date of this Consignment Cost**
- The effective Shop Location of this Consignment Cost.
Blank = ALL locations**
- The consignment settlement costs in percentage % respect to either Retail List Price or Retail Sold price respectively;
Input on only ONE of these two(2) fields allowed**
- The consignment settlement cost in fixed amount**

The Item Costs Values Reference:

Screen Display

The screenshot shows the 'Item Master Maintenance (MF0001)' screen with the 'Price & Cost' tab selected. The 'Standard Price' section displays 'Retail Price' (499.00), 'Wholesale Price' (349.00), and 'Internal Price'. The 'Discount Ctrl.' section includes 'Standard Cost' (289.00), 'Average Cost', and a 'Currency' dropdown set to 'HKD' with an 'Amount' of '0.00'. A red dotted circle highlights the 'Standard Cost' field and its associated currency and amount fields.

Prompt

Price Group

Description

X(03) - Optional field

- a code that indicates the price group of such item

Discount Ctrl.

X(01) - Must Field

- default to 'NO' discount Control to the item;
- 'NO' means sales discount is allowed in POS sales
- Max Discount input is enable if 'No' is selected
- 'YES' means NO discount is allowed in this item

Max Discount.

99.99 - Optional field

- Maximum discount allowed on such item
- Expressed in a percentage of the retail price

Standard Cost

9(07).99 – Optional Input field

- The standard cost of the item
- This standard cost value will not be changed unless override by user;

FOB Cost

9(07).99 – Optional Input field

- The FOB cost of the item

- This FOB cost value will not be changed unless override by user.
- The input space on the Right is the currency code of the FOB Cost

Average Cost

9(07).99 - Display only

- this is a *weighted average cost* calculation updated by the system automatically after performing purchase receipt operation.
- The expression :-

$$\frac{(On-hand-Qty * Avg-Cost) + (Receive-Qty * Rec-Cost)}{(On-hand-Qty + Receive-Qty)}$$

The “MORE” Button

The MORE costs reference Table

- The MORE Button consists of different Item Costs recorded by the system automatically in different operating stages. User could get use of these different costs to make the own reports for Costing Calculation, Analysis and Controls. The Costs are described as follows:

Description	Cost(Base Cur)
1 Average Cost	0.00
2 FOB Average Cost	0.00
3 Standard Cost	0.00
4 Standard Cost	0.00
5 FOB Cost(Input)	0.00
6 Last P.O. Cost	
7 Last Receive Unit Cost	
8 Last Receive Avg. Cost	
9	
10 Month End Actual Cost	

Average Cost

- This is the weighed average cost calculated at the moment of Stock Receive.
- This cost will included **ALL** other costs incurred, such as F&I, as long as they are known

FOB Average Cost

- This is the weighed average FOB cost calculated at the moment of Stock Receive.
- This cost will included **ONLY** the item's FOB cost without any other costs incurred even they are known to the system in moment of calculation

Last PO Unit Cost

- This is The Unit Cost marked from the Last PO;
- No expenses or additional cost included.

Month End Actual Cost

- This is the CONFIRMED Item's Weighted Average Cost after the Month End Process. This Cost had been re-calculated by the system in the Month End Process to include ALL costs incurred into the Item since last Month End.

Last Receive Average Cost

- The average cost (*NOT weighted Average Cost*) calculated at the moment of Stock Receive;
- This cost will included **ALL** other costs incurred, such as F&I, as long as they are known to the system in the moment of calculation

Last Receive Unit Cost

- This is The Unit Cost marked from the Last Receive moment;
- No expenses or additional cost included.

5.2.2 Inventory Folder

The screenshot shows the 'Item Master Maintenance (MF0001)' interface. At the top, there are buttons for 'ChainStore', 'Save', 'Clear', 'Validate', navigation arrows, and a user 'SX1 Admin User'. The main area has tabs: '1.Primary', '2.Price&Cost', '3.Inventory' (which is highlighted with a blue dotted circle), '4.Attributes(I)', '5.Attributes(II)', and '6.Special&&Date'. Under the 'Inventory' tab, there are sections for 'Main W/H', 'W/H Lot Remarks', 'Reorder Level (Min)', 'Unit of Measure', 'Supplier', 'Producer Code', and 'Min. Order Qty.'.

Legends:

- | | |
|----------------------|---|
| Main W/H | X(04) -Optional field
- the default warehouse code for this item |
| W/H Lot Remarks | X(10) -Optional field
- this is a reference field to indicate which lot, or section of the warehouse that the item to be stored. |
| Reorder Level | 9(07).99 - Optional field – No practice process today.
- consists of 2 fields (min/std)
(min) : minimum quantity of on-hand stock keeping
(std) : standard quantity of on-hand stock keeping |
| The “Reorder” Button | for color & size reorder level input - No practice process today. |
| Inventory Group | Optional Field - No practice process today.
- use for classifying the Inventory Group of the item. |
| Unit Of Measure | X(04) -Must field
- a code that indicates the item's unit of measure e.g. SET, piece as PCE, etc. |
| Supplier | X(08) –Must field
- the code will validate against Supplier Master File |

‘More Supplier’ button	multiple suppliers per item is allowed
Supplier Item Code	X(15) -Optional field - The article/product number the supplier used - For reference only
Producer Code	X(03) -Optional field - a producer code for reference only

5.2.3 Item Attribute (I) Folder

Some optional Legends:

The screenshot shows the 'Item Master Maintenance (MF0001)' screen. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. On the right, it says 'SX1 Admin User'. The main area has tabs: 1.Primary, 2.Price&Cost, 3.Inventory, 4.Attributes(I) (circled in blue), 5.Attributes(II), and 6.Special&Date. Below these tabs is a section titled 'Attributes' with several fields: Owner (HQ), Brand (ARW), Country, Material Code, Ext. Season, Reference 1, Reference 2, Tax Code, Product Line, and Analytic. A line points from the 'Owner' field to a callout box labeled 'Model Replenishment (optional)'. Another line points from the 'Tax Code' field to a callout box labeled 'Tax Code'. A third line points from the 'Spec. Prom.' checkbox in the 'Control' section to a callout box labeled 'Special Promotion Flag (optional)'. The 'Control' section also includes checkboxes for Lock, Replenishment, Discontinue, Gift, Model # Repl., Spec. Prom., and Non Refundable.

Model Replenishment (optional):

- This control to indicate this item is replenished by Model No., NOT by Item No. as standard

Special Promotion Flag (optional):

- This is the control to indicate this item is under special promotion mark;
- No practice process for this control flag today; just for information reference only

Tax Code :
This is the VAT% / VAT\$ tax code for the item, if available. Tax table is associated in this field.

Other Legends of Item Attribute(I) Folder:

Owner ID	X(05) - Must field - will validate the input against Owner ID table - this is the pre-defined code for Merchandiser that manages and handles this item
Brand	X(06) - Must field - will validate the input against Brand table
Country	X(02) -Optional field - will validate the input against Country table - country code which indicates where the item comes from and should exist in Country Code master file if input
Material Code	X(03) -Optional field - will validate the input against Material Code table
Replenishment	Optional - '✓' means such item is allowed to replenish from warehouse to shop
Discontinue Item -	Optional ‘✓’ means this is an discontinued item This indicate the items will not purchase again but continue to sell. This Mark allows the system to process this item for sale, but stop purchase against the items without deletion of this item record.
Lock/Release Item	Optional ‘✓’ means this is a Locked item This item will stop for all transactions. User can release this Lock Item function if “blank” is selected
EAN/UPC Code	input the UPC/EAN bar code value from here if the item has the said bar code value associated with it.
Bar Code Sequence	X(07) - Display only - a computer-generated bar code sequence - the system is default to use this bar code sequence to represent the item in the POS front end system unless specify otherwise
Reference	X(06) - Optional field - a code for user own reference only

Gift	<p>Optional ‘√’ means this is a Gift item means that such item can be given away as a gift, of zero retail price and cost allowed</p>
Analysis code desc.	<p>X(03) x 10 – Display fields - Short code describes the position stand in the item - Display according to its position defines at Analysis Code Table Maintenance</p>
Analysis code	<p>X(03) x 10 – Optional fields - the code will validate against analysis code table - user could activate each field with its own code for future analysis reports generation purpose</p>
External Season	<p>X(4) – Optional For user requires season code ‘outside’ of item code structure. For user reference only.</p>

5.2.4 Item Attribute (II) Folder

The screenshot shows the 'Item Master Maintenance (MF0001)' interface. At the top, there are buttons for 'Save', 'Clear', 'Validate', and navigation arrows. The main area displays item details: Item ID 0CHRIS1713 and Description 'girls tennnis'. Below this, a tab bar includes '1.Primary', '2.Price&Cost', '3.Inventory', '4.Attributes(I)', '5.Attributes(II)', and '6.Special&&Date'. The '5.Attributes(II)' tab is highlighted with a blue dotted circle. The 'Item Code Attribute' section contains two tabs: 'Publication' (selected) and 'Image'. Under 'Publication', there are fields for Brand (HJC), Year (2000), Supplier (100 30AFF), Category (100), Model Number (1), Article, and Variante. Under 'Image', there are fields for Sex, Season, Collection, Sub Category (CC), Label, and Product.

Image

- This is the button will lead to display the Image(s) / Picture(s) of the Item;
- The images / pictures(s) need to be stored in a dedicated Image Folder previously defined and the Image File name name MUST be in the following format:
 <Filename> = Item #_999, where the '999' is the sequence # of the image
 i.e. A9008765433_001, A9008765433_002, A9008765433_003 .. etc.
- the system will collect all pictures belong to this item and display at once under standard Windows Picture Explorer.

Prompt

Description

Brand	X(30) Optional Use for the item has brand name
Year	X(04) Optional Year of product
Category	X(12) - Optional field - item category code
Model Number	X(20) Optional field - the model number of the item
Article	X(30) Optional
Variante	X() Optional
Sex	X(04) - Optional field

- sex information

Season X(02) Optional field
- season information needs to be pre-defined in “Season Code”

Collection X(30) Optional
- collection of the item

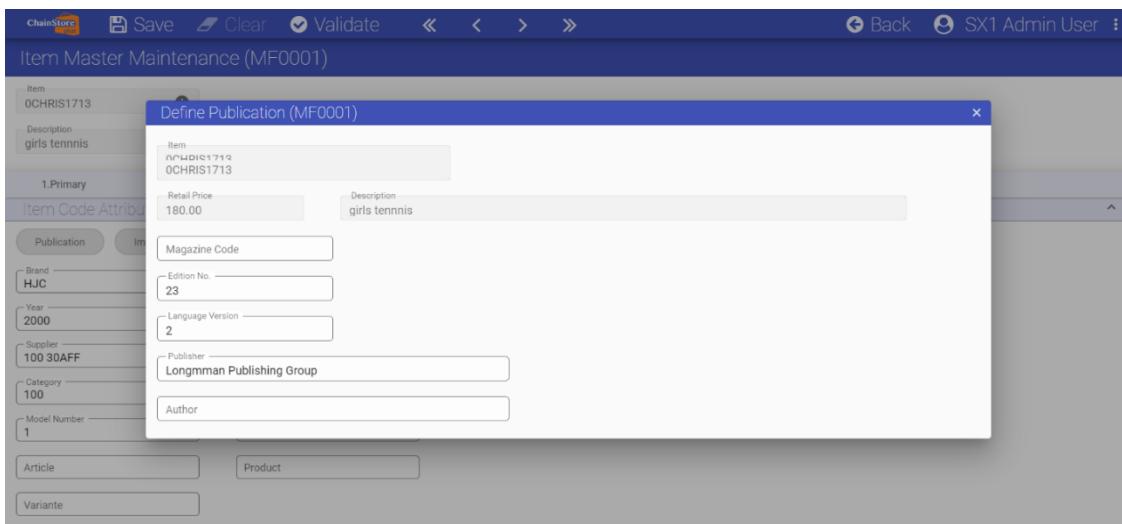
Sub Category X(12) - Optional field
- item sub-category code

Label X(20) Optional field
- the label of the item

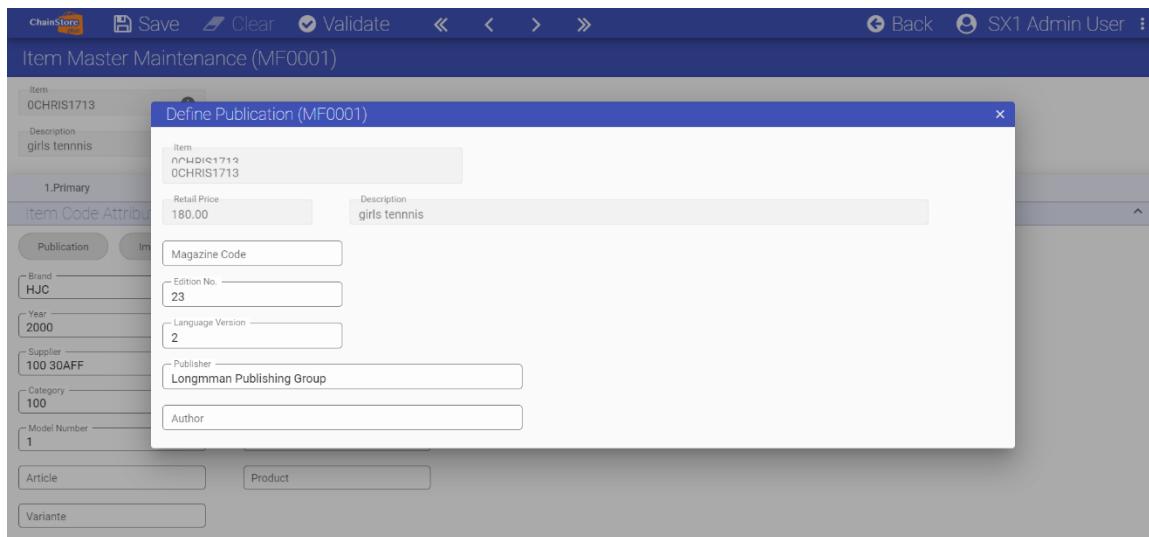
Product X(20) Optional field

Publication for item has Book or Publication related with elements as follows for user's reference.

Publication Screen Display



Special & Date Folder



Major Prompt

Model Number

Description

X(30) Optional

Use for the item has model number associate with it. Special search key is available for this Model No. in Item Inquiry function. Perfect for Watches & Jewelry Retailers or who have similar product nature.

Warranty Number

X(30) Optional

Use for the item has unique serial number associate with it. Special search key is available for this serial no. search in Item Inquiry function. Perfect for Watches & Jewelry Retailers or who have similar product nature.

Body Number

X(20) - Optional field

- information number from the manufacturer

Style Number

X(12) - Optional field

- a code for user own reference only

Volume / Content/Container

Optional field

- a code for user own reference only

Expiration Date

dd/mm/yyyy - Optional field

- to indicate the expiration date of the item, if available
- for user reference only

Some Important Dates for Display only:

Creation Date	99/99/9999 (dd/mm/yyyy) - Display only - the date when such item master record is created
First Receipt Date	99/99/9999 (dd/mm/yyyy) - Display only - the date when such item master record is first received
Last Receipt Date	99/99/9999 (dd/mm/yyyy) - Display only - the date when such item master record is last received
First Transfer Date	99/99/9999 (dd/mm/yyyy) - Display only - the date when such item master record is first transfer (usually the first transfer is from warehouse to shops)
Last Sales Date	99/99/9999 (dd/mm/yyyy) - Display only - the date when such item master record is last sold
New Season 1 st Delivery Date	99/99/9999 (dd/mm/yyyy) - Display only - the date that this item is marked as the first delivery date of the season – valid only for special seasonal product
Last Modified Date	99/99/9999 (dd/mm/yyyy) - Display only - the date when such item master record is last modified and logged with user ID

5.3 Other Masters

5.3.1 Return Voucher

These return voucher records are mostly generated from POS sales when customers are requesting a sale return activity. All return vouchers issued at shops will be kept in the back office system and maintained in this master maintenance module.

Objective:- Maintain general information about return voucher

- Function:-
1. Save Record
 2. Clear Record
 3. Validate Record

Sample Creation Screen Display ➔

The screenshot displays the 'Return Voucher Maintenance (MF5006)' screen. At the top, there are navigation buttons for Save, Clear, Validate, Back, and Admin User. The main area contains several input fields and dropdown menus. In the 'Others Information' section, the 'Issue Date' is set to 01/10/2022, the 'Amount' is 200.00, and the 'Org. Sales Memo No.' is 12345. In the 'Status' section, the 'Non-Redeemable' option is selected, and the 'Status Reason' is NRDEEM2 - Non-Return Vo... . The 'Redemption Information' section includes fields for 'Date' and 'Memo No.'

Prompt

Return Voucher No.

Description

X(04) X(08) - Must field

- a unique number to identify a particular return voucher
- the first part X(04) is the code of issue shop and the second part X(08) is the voucher no.

Issue Date

99 99 9999 - Must field (dd/mm/yyyy)

- the issue date of the return voucher

Amount	9(07).99 - Must field - the amount on the return voucher
Purchase Memo No.	X(08) - Optional field - the purchase memo no.
Status	<ul style="list-style-type: none"> - Select radio box redeem by sales and redeem by deposit must input the field Redemption Date entered - Consists of 4 status which are Outstanding, Non-Redeemable, Redeem by Sales and Redeem by Deposit - indicates the return voucher status which are Outstanding, Non-Redeemable, Redeem by Sales and Redeem by Deposit
Status Reason	<ul style="list-style-type: none"> - X (40) - Optional Field - status reason must be pre-defined by user in Return Voucher Status Reason Maintenance under "Primary"
Redemption Date	99 99 9999 - Optional field (dd/mm/yyyy) - the date when the return voucher is redeemed
Memo No.	X(04) X(08) - Must field if Redemption Date has entered - the first part X(04) is the code of redemption shop and the second part X(08) is the redemption memo no.
Last Modified Date	Display Only - the date when the record was last modified
Last Modified User	Display Only - the id of the user who last modified the record

5.3.2 Gift Certificate (Optional Module)

This is the Maintenance program for Gift Certificate Issuance Process.

The Gift Certificate record will be created automatically once the sales of a Gift Certificate is complete in POS front end and acknowledged by Back End Host Server.

The screenshot displays a software interface titled "Gift Certificate Maintenance (MF5003)". At the top, there are buttons for "Save", "Clear", "Validate", and navigation arrows. On the right, there are links for "Back" and "SX1 Admin User". The main area contains three expandable sections: "Others information", "Status", and "Redemption Information".

- Others information:** Contains fields for Issue Date (01 / 10 / 2022), Issue Shop (AB1S), Amount (120.00), and Expiry Date (31 / 12 / 2019).
- Status:** Contains radio buttons for Outstanding, Cancelled, Redeem By Sales (which is selected), and Redeem By Deposit.
- Redemption Information:** Contains a Date field (12 / 12 / 2018) and a Memo No. field (AH1S, 00255981).

Back Office user is allowed to perform maintenance work on these Gift Certificate records with caution.

Please notice any modification done on these records will be sent to all POS stations from back office server for POS updating.

5.3.3 Replenishment Schedule

This is a schedule allows user to define the days in a week that warehouse should make stock replenishment to shops. Once this per shop schedule is done, the system will generate stock replenishment pick lists shop by shop automatically in warehouse accordingly.

Objective:- Maintain general information of replenishment schedule

Sample Location Index Screen display ➔

Location Code	Name	Mon	Tue	Wed	Thu	Fri	Sat	Sun
A	Datashop 小西灣分店	X			X			
'A02	Datashop 沙頭角分店				X		X	
'A03	Datashop 旺角分店							
'A04	Datashop 銅鑼灣 分店					X	X	
'A05	Datashop 沙田分店							
'A06	Datashop 屯門分店	X	X	X	X	X		

Sample Location Replenishment Detail Screen display ➔

ChainStore
Save Clear Validate « < > » Back SX1 Admin User :

Location Replenishment Maintenance (MF3007)

Location Code
'A04

Location Name
Datashop 銅鑼灣 分店

Mon Tue Wed Thu Fri Sat Sun

Prompt

Location Code

Location Name

Replenishment Check box

Description

- indicates which location is selected

- X(40) – a description or name of the location

- ‘√’ means this select the day to do replenishment

5.3.4 Model Number

Functions :-

By Item Search Key Enquiry by Model No.

Objective :- An enquiry or modification of item information that user can check the availability of particular stock

Sample screen Model Number Information

Model Number Information (MF6000)			
Item	Description	Model Number	
100BA024D01FL	Bathrobe-Waffle	5998	
100BAAC0601FL	Printed corduroy slippers		
100BAAC0201FL	Slippers-Closed Toe	6254	
100BAAC0202FL	Slippers-Poly Velour	6255	
100BAAC0203FL	Slippers-Ribbon	6256	
100BAAC0301FL	Slippers-Open toe-Jacquard	6257	

Prompt

Item Code

Description

X(14) - Must field

- a unique code which defines a particular item

Description

X(40) - Must field

- detail item description

Model Number

X(30) – Must field

- detail item model number

5.3.5 Guarantee Number

Functions :-

By Item Search Key Enquiry by Guarantee No

Objective :-

An enquiry or modification of item information that user can check the Guarantee No. of particular stock

Sample screen Model Number Information

Guarantee No. Information (MF6001)		
Item	Description	Guarantee No.
00000001	COLOR SIZE	990
00000004	Button-Sma/10.....	991
00000001	COLOR SIZE	
0000000A	COUPO	
0000000B	COUPO	

5.3.6 Cash Coupon

General Cash Coupon Maintenance (Non-Print)

This is the Maintenance program for Cash Coupon Issuance Process.

User could create, modify, or delete Cash Coupon in this maintenance program and the system will update to POS front end stations automatically.

The screenshot shows a software interface for managing coupons. At the top, there's a toolbar with icons for Save, Clear, Validate, and navigation arrows. The title bar reads "Cash/Uniform Coupon Maintenance (MF7009)". On the right, it shows "SX1 Admin User". The main area is divided into sections:

- Coupon:** Shows "Coupon No. CC" and "0000001".
- Others Information:** Includes fields for "Issue Date" (01/10/2022), "Amount" (50.00), "Disc%" (0.00), and "Expiry Date" (31/12/2006).
- Status:** Radio buttons for "Outstanding", "Cancelled", "Redeem By Sales" (which is selected), and "Redeem By Deposit".
- Redemption Information:** Includes fields for "Issue Date" (01/11/2006), "Memo No." (AB1S), and "Amount" (50.00).

5.3.1.1 Serial Number Cash Coupon Generation option

ChainStore Save Clear Validate < < > >> Back SX1 Admin User :

Serial Number Coupon Generation (CR1009)

Generation Criteria

Coupon Type: CC - Cash Coupon

From Coupon To Coupon

Coupon Date: 01 / 10 / 2022 Expiry Date:

Coupon Amount Coupon Amount

Coupon Percentage Coupon Percentage

One Time Usage Multi-Time Usage

One Time Usage – the coupon is for one time use only within the effective period
Multi-Time Usage – the coupon allows for multi-time use within the effective period

Coupon Amount - The face value\$ of the Coupon. i.e. \$100, or \$50..etc.,
Coupon Percentage – The Discount % allowed of the Coupon. i.e. 10%, 15%...etc..

This is the Coupon Serial number generation range to be input by user for Coupon Generation. Caution: Duplicated Number NOT allowed.

5.4 Member Master

5.4.1 Member Type Maintenance

Prerequisites : - This is the table to create Member Type for grouping members into meaningful member groups. This will provide easier path to organize relative data for meaningful reports upon request.

Objective : - Maintain member type information which classify member into different categories.

Function : -

1. Create Record
2. Clear Record
3. Validate Record

Screen Display :

The screenshot shows the 'Membership Management Information (MF3005)' screen. At the top, there are buttons for Save, Clear, Validate, Back, and User information. The main area displays a member type record with fields like 'Member Type' (set to 'B'), 'Description' (General Staff), and various discount and extra percentage fields. A note in a callout box states: "This is set for the Member Type is classified for Crossed Region customers. It means the member discount specified under this type will apply to POS sales for those are visiting Overseas members within organization." Below this, there's a 'Turn Over Control' section with options for 'With Limit' and 'Without Limit'. Under 'Control Period', there are radio buttons for 'One Time Purchase', 'Monthly Basis', 'Quarter', 'One Time Basis', and 'One Purchase Member'. In the 'Sales Control' section, 'Net Sales' is selected. The 'Staff Control' section has 'Non Staff' selected. The 'Bonus Points Rewards' section at the bottom has a red oval around the 'Bonus Points' field (set to 0.0) and the 'Redm. Group' dropdown. A callout box in this section states: "**Bonus Point Reward:** This is work for NEW MEMBER one-time Bonus Point give away ONLY. **Redemption Group** – the default Redemption Group for the Bonus Point to be stored. **Bonus Point** - The number of Bonus Points will be given when the new member join-in".

<u>Prompt</u>	<u>Description</u>
Member Type	X(01) - Must Field - Type code of member
Description	X(40) - Optional Field - Text description of such member type
Discount %	9(02).9(02) - Optional Field - The entitled sales discount Percentage for this member type
Extra %	9(02).9(02) - Optional Field - The entitled <i>EXTRA</i> sales discount Percentage in case of special promotional event
Max Disc. Bar %	9(02).9(02) - Optional Field - The maximum discount % is allowed under all promotional events
Turn-over Control	X(01) - Must Field - Control with Turn-over Limit plus either Amount base or Qty base is allowed
Turn-over Limit	9(06).(02) - Optional Field - Maximum accumulated sales amount permitted for such member type if Limit Control is active. This usually apply to staff purchase environment
Control Period	X(01) - Optional Field - Control the limit is controlled whether one time purchase, monthly or Quarterly bases.
Sales Control	X(01) - Must Field - indicate the turn over limit should based on Gross Sales or Net Sales amount
Staff Control	X(01) - Must Field - to indicate this is a non-staff or staff member type

ChainStore Plus Save Clear Validate Back SX1 Admin User

Membership Management Information (MF3005)

Member Type 'B	Description General Staff
<input checked="" type="radio"/> Primary <input type="radio"/> Upgrade <input type="radio"/> Renewal	
Discount % <input type="text" value="25.00"/> Extra % <input type="text" value="5.00"/> Max Disc. Bar % <input type="text" value="45.00"/> Coupon Exp. Period <input type="text" value="0 Days"/>	
<input type="checkbox"/> Non - Expiry Member <input type="checkbox"/> Global <input type="checkbox"/> Member Not Download <input type="button" value="Accessible"/> <input style="border: 2px dotted red; border-radius: 50%; padding: 2px;" type="button" value="Other"/>	
Turn Over Control With Limit Type <input type="text" value="A - Amt. Limit"/> Turn-Over Amt. Limit <input type="text" value="200.00"/> Turn-Over Qty. Limit <input type="text" value="0"/> Without Limit	

This Other Button in input screen allows user to define additional discount controls to where and how it should be applied for this Customer Type.

ChainStore Plus Save Clear Validate Back SX1 Admin User

Membership M. Other Discount PROPERTIES(MF3005)

Max Disc. Bar %	Turn Over Control	Division	Brand + Category
<input checked="" type="radio"/> With Limit <input type="radio"/> Without Limit		Location <input style="border: 2px dotted blue; border-radius: 50%; width: 20px; height: 20px; vertical-align: middle;" type="text" value="A"/> Description <input type="text" value="Datashop 小西灣分店"/>	
Control Period <input type="radio"/> One Time Purchase <input type="radio"/> Yearly(From MM)		Discount % <input type="text" value="0.00"/> Extra % <input type="text" value="0.00"/>	
Sales Control <input type="radio"/> Sales <input checked="" type="radio"/> Net Sales		To specify which Location, which Division, which Brand or which Product Category should apply to this particular Customer Type	
Staff Control		Indicate which particular locations, divisions, brands and category should be applied.	
		Any specific discount % or Extra Discount % apply to this Customer Type.	

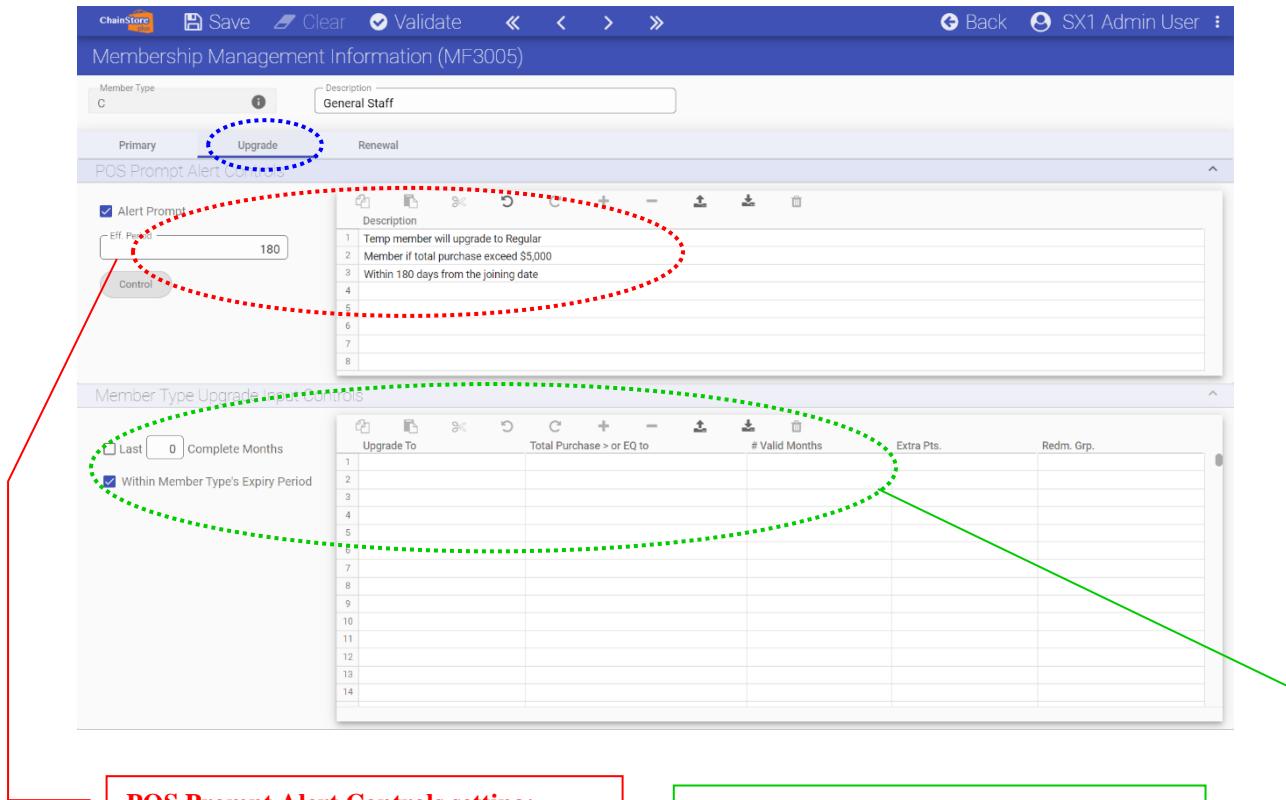
5.4.2 Online Credit Check on Staff / Member's Total Purchase

The screenshot shows the 'ChainStore' software interface for 'Membership Management Information' (MF3005). The 'Turn Over Control' section is circled in red. Within this section, the 'With Limit' radio button is selected. Other options like 'Without Limit' and 'Yearly(From MM)' are shown but not selected. The 'Type' dropdown is set to 'A - Amt. Limit', and the 'Turn-Over Amt. Limit' field contains '200.00'. The 'Turn-Over Qty. Limit' field contains '0'.

In case the purchase limit is applied for this particular customer type, i.e. Staff Purchase, the POS system will perform ONLINE credit check in Back Office via internet connection to avoid over limit purchase. POS front end system will reject the sales if found the member, most likely is staff purchase, is over purchase within control period.

The Upgrade Rules for Member Customer

This is the general upgrade rule ALL the customers from a customer to another customer type when the following defined conditions are satisfied. This member upgrade process will be performed by a batch job in back office as per user schedule.



POS Prompt Alert Controls setting:

- Once the Alert Prompt is checked plus Effect Period (in Days) is filled, the POS front end system will then auto display the TEXT message on the right as POS user reminder within the effective period;

For meaning in Example above:

- Whenever member customers under this customer type "**F**" is making purchase in shop within 180 days counted from the customer's first purchase date, will lead the POS system to prompt the Text message on the right automatically as reminder to POS user during sales action.

Member Type Upgrade Controls setting

ALL members within the customer type will upgrade to a new member type as specified if the total Bonus Points earned over the input value since the first purchase date;

For meaning in example above:

ALL members within the customer type "**F**" will upgrade to member type "**E**" if the total Bonus Points earned is over "5,000" points since the first purchase date.

There is NO Member downgrade mechanism yet as of version 6.4.3.

5.4.3 Member Master Maintenance

This is the Master file to store Member details. This master file provides opportunity to allow users perform customer analysis based on member's sales history, behavior and hobby.

Objective :- Maintain the personal information of customers who are frequent shoppers or potential members

Functions :-

1. Create Record
2. Clear Record
3. Validate Record

Page 1 Screen Display :-

The screenshot shows the 'Member Master Maintenance (MF2005)' screen. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. On the right, there are links for Back, SX1 Admin User, and a user icon. The main area has tabs for 'Address & Phone' (selected), 'Membership', and 'Other'.
Personal Information:
Member No.: 01200481034
Title: MR.
Last Name: WONG
First Name: KONG SANG
Name: WONG KONG SANG JACKIE
Alias: JACKIE
Page navigation: Page 1 (highlighted), Page 2, Page 3
Address & Phone:
Address Line 1: 大角咀道500號
Address Line 2: 千勝大廈 506室
Address Line 3:
Area Code:
Postal Code:
Home Phone: 22280000
Mobile Phone: 90963234
Membership:
Type: AO QUEEN
Main Member No.:
Sub Member:
Issue Date: 01 / 11 / 2022
Issue Shop: A07
Start Date: 01 / 03 / 2023
Pickup Shop: A007
Expiry Date:
Cancel:
Subscribe:
 No EDM No DM No Phone No SMS

<u>Prompt</u>	<u>Description</u>
Member No.	X(15) - Must field - An unique number which indicates the member no.
Type	X(01) - Must field - Type code of the member that is pre-defined in 'Membership Management Information'
Lastname	X(30) - Must field - Member's lastname
Firstname	X(30) - Must field - Member's firstname
Address	X(90) x 4 - Optional field - Address of customer who join member.
Area Code	X(02) - Optional field - User-defined area code for reference only
Postal Code	X(202) - Optional field - User-defined postal code for reference only
Home No.	X(15) - Optional field - Phone number of customer
Mobile No.	X(15) - Optional field - Phone number of customer
Issue Date	99 99 9999 - Must field - The member membership issue date
Issue Shop	X(04) - Must field - Shop which issues this member membership
Pickup Shop	X(04) - Must field - Member take their membership from which shop
Expiry Date	99 99 9999 - Must field - The member membership expiry date

Page 2

The screenshot shows the 'Member Master Maintenance (MF2005)' interface. At the top, there are buttons for Save, Clear, Validate, Back, and SX1 Admin User. The main area displays member details: Member No. 01200481034, Title MR., Last Name WONG, First Name KONG SANG, Name WONG KONG SANG JACKIE, and Alias JACKIE. Below this, tabs for Personal, Attributes, and Analysis are visible, with Personal selected. The Personal tab contains fields for Date of Birth (01/07/1997), Age (25), Age Group (P), ID No. Z965700(0), Email Addr. 1 (jackiewong@jchhk.com), Email Addr. 2, Nationality (02), Occupation (MD - Medical Doctor), and Gender (Male). The Attributes tab shows fields for Card No., Prod. Date, RW Card ID, RW Card Issue, Staff No., and Referral.

Prompt

Date of Birth

Age

Age Group

Card I.D.

Nationality

Sex

Description

99 99 9999 - Optional field

- Birth date of customer who joins as member

9(02) - Display only

- Automatically calculated if birth date is given

system selection of correct age group or user self input

X(15) - Optional field

- Identification Card No. of customer

X(02) - Optional field

- Nationality of customer who joins member
- Check against nationality table

Member gender

Page 3

The screenshot shows the 'Member Master Maintenance (MF2005)' application interface. At the top, there are buttons for 'Save', 'Clear', 'Validate', and navigation arrows. The main area displays a list of member attributes. A blue box highlights the 'Description' column of the table, which contains free-text entries like 'Above 30K'. A red oval highlights the 'Page 3' button at the bottom of the page.

Field	Description
MemberGUID	
MembershipCategory	
MembershipRoleStatus	
MembershipCardStatus	
ConcessionScheme	
AgeGroup	Above 30K
DOB	
NewMember	
MemberSalutation	
MemberAddressName	
MemberNameEN	

The above is a Free TEXT input format for user's own reference

5.4.4 JV Member Table Maintenance

JV Member Table is used for defining Joint Venture Partnership for Member. For the user who may want to join or share Membership privilege with other organization, such as Asia Mile Program, may get use of this table for later calculation in Bonus Points, or other benefits.

The Detail Input Page as follows:

ChainStore Save Clear Validate << < > >> Back SX1 Admin User :

JV Partners Table Maintenance (MX1000)

JV Partners

ASIAMILE

Others Information

Name: Asia Miles
From Date - To Date: 14 / 12 / 2018 - 31 / 12 / 2019

JV Point Control

No Control No Point Earn If Total Disc > Disc. % (On List): 80.00

No Control – Bonus Points will be given to the Member once the purchase has been made
Or
Bonus Points will be given ONLY if the Purchase Discount NO more than the input value

The Effective Date Range of the Joint Venture Partner Event

5.4.5 New Member Recruitment Maintenance

Under this New Member Recruitment Process, user is able to determine the New Member recruitment re-requisite for POS operation in shop. The POS system in shop will auto prompt up for New Member creation only if the customer's purchase conditions are satisfied.

Amt\$ >=	Amt\$ <=	Member Type	Description
1,000.00	3,000.00	SILVER	Silver
3,001.00	6,000.00	DIAMOND	Diamond
6,001.00	9,999,999.00	PLATINUM	Platinum
4			
5			
6			
7			
8			
9			
10			
11			
12			
13			
14			
15			
16			
17			
18			
19			
20			

The above example is illustrating how a non-member customer is eligible to become a new member in different classes when making purchase in shop if:

- One time memo purchase fall between \$1,000 - \$3000 - Silver class is grant;
- One time memo purchase fall between \$3,001 - \$6000 - Diamond class is grant;
- One time memo purchase fall over \$6001 - Platinum class is grant;

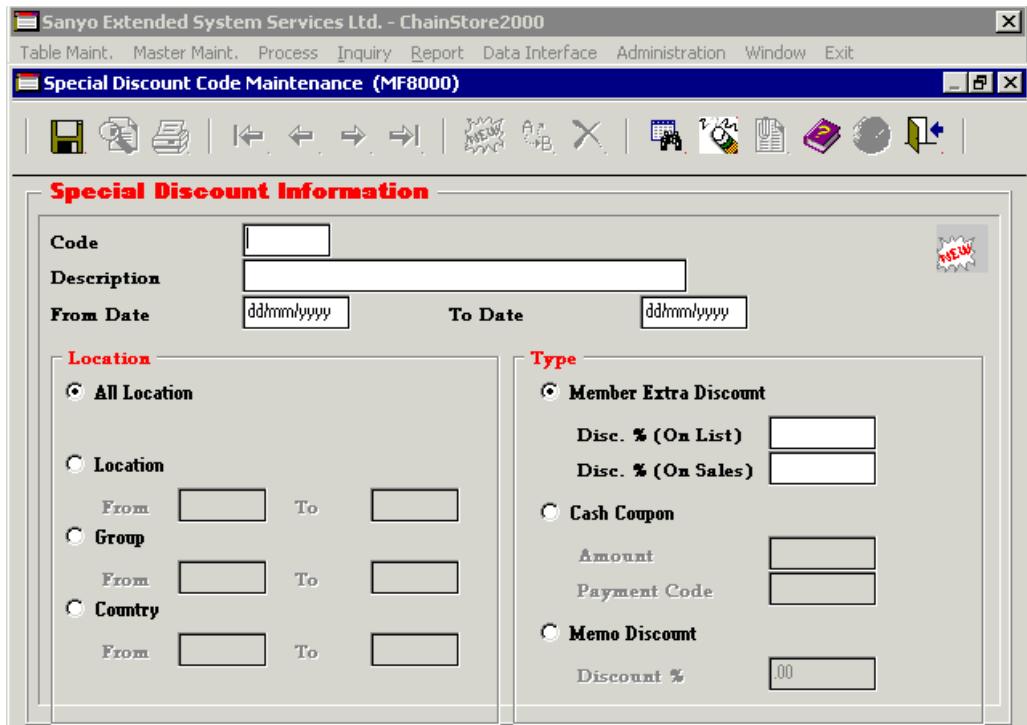
The POS system will make appropriate user message and creation UI according to the conditions as set. This Member Message Prompt is organized into the system's "Member Message Centre" as one of member messages (could be many) and prompt at once when member is checking-in from POS in shop.

5.4.6 Special Discount Code Maintenance (Del???)

Objective: - Maintain special discount code

- Provide create, modify, delete, inquire special discount code.

Screen Display: -



<u>Prompt</u>	<u>Description</u>
Code	X (03) - Must Field - Transaction Code defined by user
Description	X (40) - Must Field - Description for such Transaction Code
From Date	99/99/9999 (dd/mm/yyyy) - Optional field - The starting effective date
To Date	99/99/9999 (dd/mm/yyyy) - Optional field - The ending effective date

5.4.9 On Sale Price Maintenance

The ON-LINE MODE Maintenance

5.4.9.1 Page Mode

In On Sale Price Maintenance, user is allowed to enter on-sale prices for any particular item for a specific sale period. In fact, the system allows multiple on-sale prices in each item down to different country, group, locations, or color.

There are three input modes for on-sale price :

- page mode
- online mode
- group mode

The Page Mode Input :

This process allows user to input the on sales price in form of PAGE input as follows:

Item	*	Cost	Retail Price	Description	Disc. Code(1)	OnSale Price(1)	Disc% (1)	From Date(1)	To Date(1)	Disc. Code(2)	OnSale Price(2)	Disc% (2)	From Date(2)	To Date(2)
100BA00001SAP		150.00	180.00	Bathrobe-Blue		0.00	0.00				0.00	0.00		
100BA00002HAN		85.00	180.00	Bathrobe-Gent		0.00	0.00				0.00	0.00		
100BA00003HAN		85.00	180.00	Bathrobe-Lady		0.00	0.00				0.00	0.00		
100BA00004SAP		141.00	180.00	Bathrobe-Rose		0.00	0.00				0.00	0.00		
100BA00006HAN		80.55	230.00	Bathrobe w/Hood		0.00	0.00				0.00	0.00		
100BA00007HAN		85.00	180.00	Bathrobe-Adult		0.00	0.00				0.00	0.00		

On Sales Price

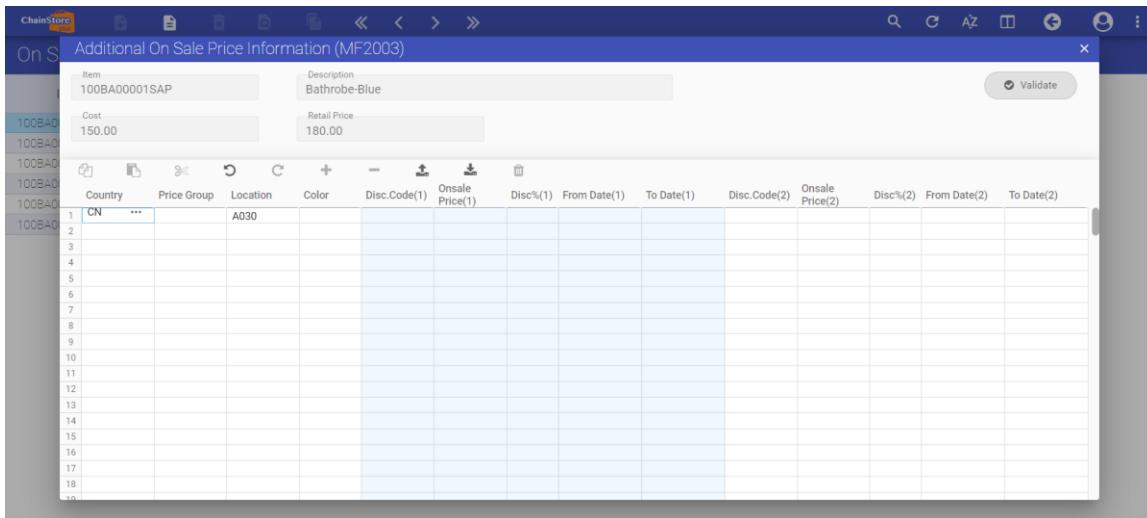
9(07).99 - Optional field

- value of on sale price for particular item
- mutually exclusive with the Discount Rate field

On-Sales Price (1) <Amount\$>	<ul style="list-style-type: none">On-Sales Amount\$ input for the on-sales item
Disc (1) On-Sales discount%	<ul style="list-style-type: none">99.99% - % input for the on-sales discountmutually exclusive with the On Sale Price\$ input field
From Date (1)	<ul style="list-style-type: none">ddmmmyyyy -Must field if on sale price has been enteredthe beginning date of on sale for this item
To Date (1)	<ul style="list-style-type: none">ddmmmyyyy -Must field if on sale price has been enteredthe ending date of on sale for this item
On-Sales Price (2) <Amount\$>	<ul style="list-style-type: none">On-Sales Amount\$ input for the on-sales item
Disc (2) On-Sales discount%	<ul style="list-style-type: none">99.99% - % input for the on-sales discountmutually exclusive with the On Sale Price\$ input field

From Date (2)	<ul style="list-style-type: none"> • ddmmmyyyy -Must field if on sale price has been entered • the beginning date of on sale for this item
To Date (2)	<ul style="list-style-type: none"> • ddmmmyyyy -Must field if on sale price has been entered • the ending date of on sale for this item

Additional Price Input Screen ➔



Prompt

Country

Description

X(02) - Optional field

- country code of the retail store, and it should be existed in Country Code Master file

Group

X(03) - Optional field

- group of the retail store, and it should be existed in Group Code Master file

Location

X(04) - Optional field

- location code of the retail store, and it should be existed in Location Code Master file

Color

X(03) - Optional field

- particular color of the item, and it should be existed in Color Code Master file

5.4.9.2 Line Mode

Objective: - In this program, user is allowed to input the on-sales data into the system one by one in a line mode with audit trial history log.

On Sale Price retrieval order:

- | | |
|------------|------------------|
| 1. Color | - Color Level |
| 2. Loc. | - Location Level |
| 3. Grp | - Group Level |
| 4. Country | - Country Level |
| 5. Item | - Item Level |

Screen Layout: -

On Sale Price Maintenance (On-Line Mode) (MF3001)

Date	Time	Country	Group	Location	Item	Color	R.Price	Disc%/Price	Start	End	User
20/01/2021	10:25:11:12				JTEST		0.00	18/01/2021	22/01/2021	sxd	
20/01/2021	10:23:57:09				JTEST		0.00	19/01/2021	28/01/2021	sxd	
20/12/2019	10:52:46:72		A007		100AC 20HJC001		1,090.00				
20/12/2019	10:49:34:20		A007		100AC 20HJC001		1,090.00				
23/05/2019	09:55:36:10		AC1SK		000000		20.00			020	
15/05/2019	11:53:44:99		AC1SK		000000		20.00			sxd	

On Sale Information

Item

Retail Price

Discount Code

Price Discount

Start Date End Date

Level Selection

All Country Price Group Location

Color Selection

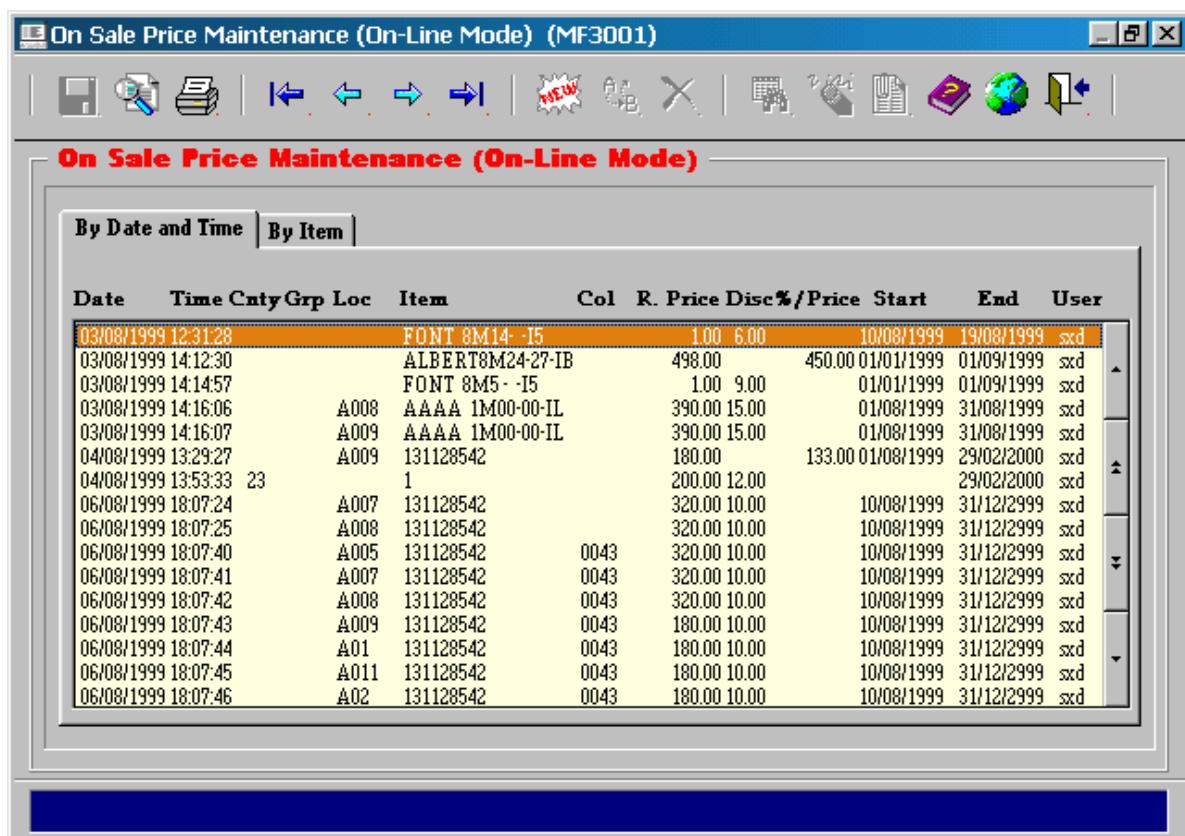
All Color

The Discount Item could be input search either by Item, Vendor's Item Code, Vendor No or SKU (Bar Code)

Where do you want the discount item apply to?

- Choice of apply To ALL locations, to a Particular Country only, to a Price Control Group, or to a particular Location.

On-Sales Price Line Mode Maintenance Screen Display:



Sample Instruction in operating On –line On Sale Price Input

In general, user should make sure all the fields of this maintenance are completely input. After all the information have been input correctly, confirm this updating by pressing F1 or exit to previous by pressing ESC.

5.4.9.3 Group Mode

Objective :- To maintain the information of the price and discount item.

Sample Menu Screen display ➔

The screenshot displays the 'On Sale Price Information (Group Mode) (MF3006)' screen. At the top, there are standard navigation buttons: New, Edit, Back, and Sanyo.. Below the title, a 'Description' field contains 'TEST ACU'. The main interface is divided into several sections:

- Location Selection:** Contains radio buttons for 'All', 'Country', 'Price Group', and 'Location', each with 'From' and 'To' input fields.
- Item Selection:** Contains checkboxes for 'All Category', 'All Sub Cat.', 'All Item', and 'All Color', each with 'From' and 'To' input fields. It also includes dropdowns for Brand, Sex, Year, and Season.
- On Sale 1 & On Sale 2:** Two separate boxes for 'On Sale 1' and 'On Sale 2'. Each box has a checkbox for 'Clear On Sale', a dropdown for 'Disc. Code', and input fields for 'Price' and 'Disc %'. It also includes 'Start Date' and 'End Date' fields with calendar icons.

Prompt

All Location

From Location

To Location

From Group

To Group

From Country

To Country

Season

Description

- Select radio box is means select all location, all group and all country. The location, group and country input will disable.

X(04) - Optional field

- Location code that start to be consolidated

X(04) - Optional field

- Consolidation to be ended after this location

X(03) - Optional field

- Group code that start to be consolidated

X(03) - Optional field

- Consolidation to be ended after this group

X(02) - Optional field

- Country code that start to be consolidated

X(02) - Optional field

- Consolidation to be ended after this country

X(02) - Optional field

	- Enter a season code to be consolidated
Brand	X(02) - Optional field - Enter a Brand code to be consolidated
All Category	- Optional field '✓' means select all category
From Category	X(03) - Optional field - Category code that start to be consolidated
To Category	X(03) - Optional field - Consolidation to be ended after this category code
All Sub Cat	- Optional field '✓' means select all sub category
From Sub Cat	X(03) - Optional field - Sub Category code that start to be consolidated
To Sub Cat	X(03) - Optional field - Consolidation to be ended after this Sub Category
All Item	- Optional field '✓' means select all item
From Item no	X(14) - Optional field - Item number that start to be consolidated
To Item no	X(14) - Optional field - Consolidation to be ended after this item number
All Color	- Optional field '✓' means select all color
From Color	X(03) - Optional field - Color code that start to be consolidated
To Color	X(03) - Optional field - Consolidation to be ended after this color code
Onsale 1 Reset	X(01) - Optional field Y- Clear all the On sale price . N- Need to input a Price1 , Discount1 and Date
Price 1	S9(07)V9(02) - Optional field
Disc 1	S9(03)V9(02) - Optional field
Onsale 2 Reset	X(01) - Optional field Y- Clear all the Onsale price N- Need to input a price2 , Discount2 and Date
Price 2	S9(07)V9(02) - Optional field
Disc 2	S9(03)V9(02) - Optional field
From	99/99/9999 - Optional field - Particular period for On-sale

Sample Enquiry Screen → After select Enquiry

On Sale Price Maintenance - Group Mode								
<---- On Sale 1 ---->				<---- On Sale 2 ---->				
Date	Time	Fr Date	To Date	Disc %	Fr Date	To Date	Disc %	User
16/08/1999	16:44:58				01/09/1999	10/09/1999		sxd
16/08/1999	16:58:26							sxd
16/08/1999	17:00:07							sxd
16/08/1999	17:07:20	01/10/1999	01/10/1999	2.00				sxd
16/08/1999	17:16:00	01/01/1991	01/01/1992	2.00	01/01/1993	01/01/1994		sxd
16/08/1999	17:20:09	01/01/1991	01/01/1991		01/01/1992	01/01/1992	2.00	sxd
16/08/1999	17:25:43	01/01/1991	01/01/1991		01/01/1992	01/01/1992	2.00	sxd
16/08/1999	17:30:36	01/01/1993	01/01/1993		01/01/1994	01/01/1994	2.00	sxd
16/08/1999	17:31:42							sxd
16/08/1999	17:37:45	01/01/1994	01/01/1994		01/01/1995	01/01/1995	3.00	sxd
16/08/1999	17:41:21							sxd
16/08/1999	17:45:35	01/01/1991	01/01/1991		01/01/1992	01/01/1992	3.00	sxd
16/08/1999	18:14:57							sxd
16/08/1999	18:35:35	01/01/1991	01/01/1991		01/01/1992	01/01/1992	4.00	sxd
16/08/1999	18:37:02							sxd
16/08/1999	18:41:00	01/01/1992	01/01/1992		01/01/1993	01/01/1993	5.00	sxd
17/08/1999	11:59:44	01/01/1991	01/01/1992					sxd
17/08/1999	12:03:21	01/01/1991	01/01/1999	30.00				sxd

End of file is reached

THE BATCH Maintenance

5.4.10 On Sale Price Maintenance

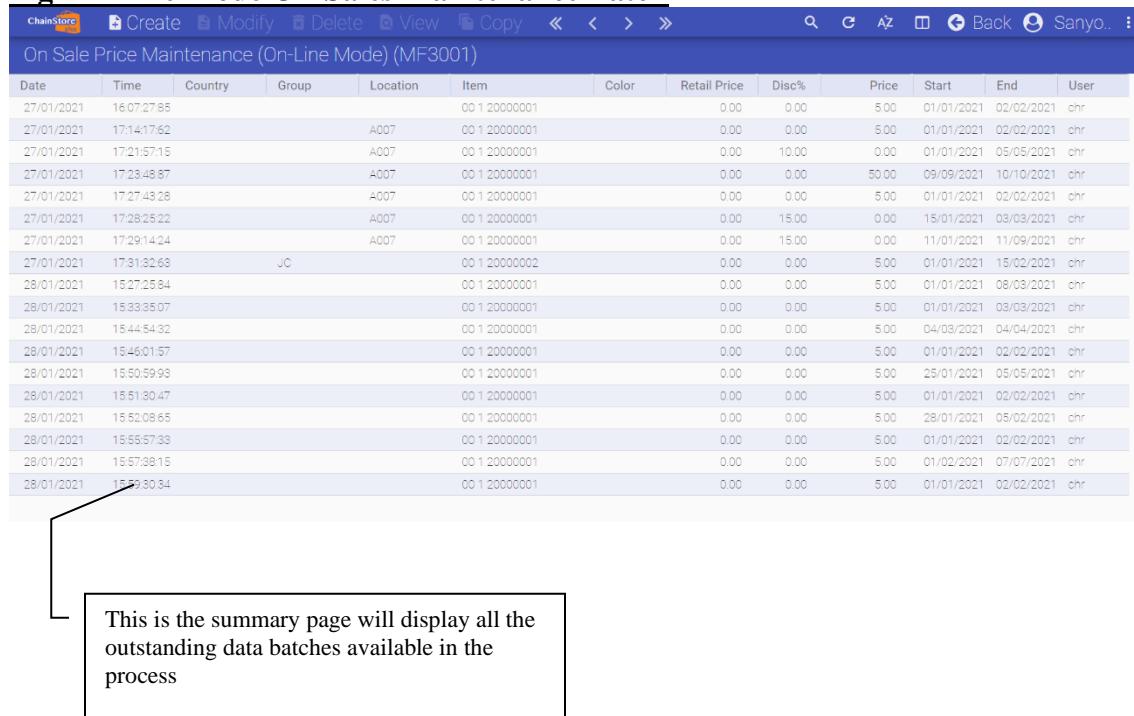
This is the Batch Maintenance Process for Items' On-Sales Price Promotion Program. The major difference of this Maintenance process from the last section "On-Line" maintenance is this is a **BATCH** process that will save the input transactions in a Data Batch, system validation, allow draft printing, data amendment if necessary and finally confirm with data posting.

The entire BATCH processing routine will follow the same standard procedures of Batch processing in other processes throughout ChainStorePlus package.

This BATCH mode again will come with Line Mode and Group Mode same as On-Line processing in last section

5.4.10.1 Line Mode

Fig-1 - Line Mode On-Sales Maintenance Batch



Date	Time	Country	Group	Location	Item	Color	Retail Price	Disc%	Price	Start	End	User
27/01/2021	16:07:27.85				001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
27/01/2021	17:04:17.62		A007		001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
27/01/2021	17:21:57.15		A007		001 20000001		0.00	10.00	0.00	01/01/2021	05/05/2021	chr
27/01/2021	17:23:48.87		A007		001 20000001		0.00	0.00	50.00	09/09/2021	10/10/2021	chr
27/01/2021	17:27:43.28		A007		001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
27/01/2021	17:28:25.22		A007		001 20000001		0.00	15.00	0.00	15/01/2021	03/03/2021	chr
27/01/2021	17:29:14.24		A007		001 20000001		0.00	15.00	0.00	11/01/2021	11/09/2021	chr
27/01/2021	17:31:32.63	JC			001 20000002		0.00	0.00	5.00	01/01/2021	15/02/2021	chr
28/01/2021	15:27:25.84				001 20000001		0.00	0.00	5.00	01/01/2021	08/03/2021	chr
28/01/2021	15:33:35.07				001 20000001		0.00	0.00	5.00	01/01/2021	03/03/2021	chr
28/01/2021	15:44:54.32				001 20000001		0.00	0.00	5.00	04/09/2021	04/04/2021	chr
28/01/2021	15:46:01.57				001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
28/01/2021	15:50:59.93				001 20000001		0.00	0.00	5.00	25/01/2021	05/05/2021	chr
28/01/2021	15:51:30.47				001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
28/01/2021	15:52:08.65				001 20000001		0.00	0.00	5.00	28/01/2021	05/02/2021	chr
28/01/2021	15:55:57.39				001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
28/01/2021	15:57:38.15				001 20000001		0.00	0.00	5.00	01/02/2021	07/07/2021	chr
28/01/2021	15:59:30.34				001 20000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr

This is the summary page will display all the outstanding data batches available in the process

Fig-2 – On-Sales Price Maintenance Line Mode Data Batch

The screenshot shows the 'On Sale Price Maintenance (On-Line Mode)' screen. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. Below the header, a table titled 'Latest History' displays price maintenance records for item 00 AC 2000001. The table columns include Date, Time, Country, Group, Location, Item, Color, R.Price, Disc%/Price, Start, End, and User. The data shows several entries from March 1, 2023, with various start and end dates and discount percentages.

On Sale Information

Item: 00 AC 2000001

Retail Price: 100.00

Discount Code: ONSALE

Price: 100.00

Start Date: 01 / 01 / 2019

End Date: 01 / 01 / 2020

- This is the input details for an on-sales item promotion. They are the same content as in the On-Line Mode Process.
- Please be aware the "confirm" of this input item will not put the promotion into effective UNTIL further step of "Batch Posting" – final confirm of a collection of data transactions

5.4.10.2 Group Mode

The Group Mode of a Batch On-Sales Price Maintenance allows user to "Extract" a collection of items from Price Master under certain selection criteria offered by the package. This process requires NO item input one by one as in Line Mode process.

The Process as follow:

Operation Steps

1. Group Selection – select the desire promotion items from Item Master by The "Group Mode" selection criteria;
2. Extract Style/SKU – this is the item extraction process that will instruct the system to perform items selection as per user instruction in Step 1 – Group Selection;
3. Select Style/SKU – at this point, user allows to "amend", delete or new add promotion items from the extract result of step 2. This process allow user able to "refine" the selection result in case of necessary;
4. Batch Validation – the system will validate the transaction data in the batch and Validation Report will b printed for record / auditing purpose;
5. Batch Posting – this is the final step to "confirm" the transactions in the system. After the posting the transaction data will become effective and write to transaction journal permanently without change. Change can only be done by adding a new transaction / record to over-ride the previous result, not previous transaction deletion.

Fig- 1

Date	Time	Country	Group	Location	Item	Color	Retail Price	Disc%	Price	Start	End	User
27/01/2021	16:07:27:85				0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
27/01/2021	17:14:17:62		A007		0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
27/01/2021	17:21:57:15		A007		0012000001		0.00	10.00	0.00	01/01/2021	05/05/2021	chr
27/01/2021	17:23:48:87		A007		0012000001		0.00	0.00	50.00	09/09/2021	10/10/2021	chr
27/01/2021	17:27:43:28		A007		0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
27/01/2021	17:28:25:22		A007		0012000001		0.00	15.00	0.00	15/01/2021	03/03/2021	chr
27/01/2021	17:29:14:24		A007		0012000001		0.00	15.00	0.00	11/01/2021	11/09/2021	chr
27/01/2021	17:31:32:63	JC			0012000002		0.00	0.00	5.00	01/01/2021	15/02/2021	chr
28/01/2021	15:27:25:84				0012000001		0.00	0.00	5.00	01/01/2021	08/03/2021	chr
28/01/2021	15:33:35:07				0012000001		0.00	0.00	5.00	01/01/2021	03/03/2021	chr
28/01/2021	15:44:54:32				0012000001		0.00	0.00	5.00	04/03/2021	04/04/2021	chr
28/01/2021	15:46:01:57				0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
28/01/2021	15:50:59:93				0012000001		0.00	0.00	5.00	25/01/2021	05/05/2021	chr
28/01/2021	15:51:30:47				0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
28/01/2021	15:52:08:65				0012000001		0.00	0.00	5.00	28/01/2021	05/02/2021	chr
28/01/2021	15:55:57:33				0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr
28/01/2021	15:57:38:15				0012000001		0.00	0.00	5.00	01/02/2021	07/07/2021	chr
28/01/2021	15:59:30:34				0012000001		0.00	0.00	5.00	01/01/2021	02/02/2021	chr

Fig- 2

Step 1: Group Selection – select the desire promotion items from Item Master by The "Group Mode" selection criteria Interface

Fig- 3

Step2:

Extract Style / SKU – this is the item extraction process that will instruct the system to perform items extraction as per user's selection in Step 1 – Group Selection;

Fig- 4 – Item Selection

Step3: Select Style/SKU

At this point, user allows to "amend", delete or new add promotion items from the extract result of step 2. This process allow user able to "refine" the selection result in case of necessary;

The Item marked with "*" is selected

These buttons allow user to add, delete or amend selected items as user desire

Fig- 5 – Batch Validation

Step4: Batch Validation

Batch Validation – the system will validate the transaction data in the batch and Validation Report will be printed for record / auditing purpose

Fig- 5 – Batch Posting

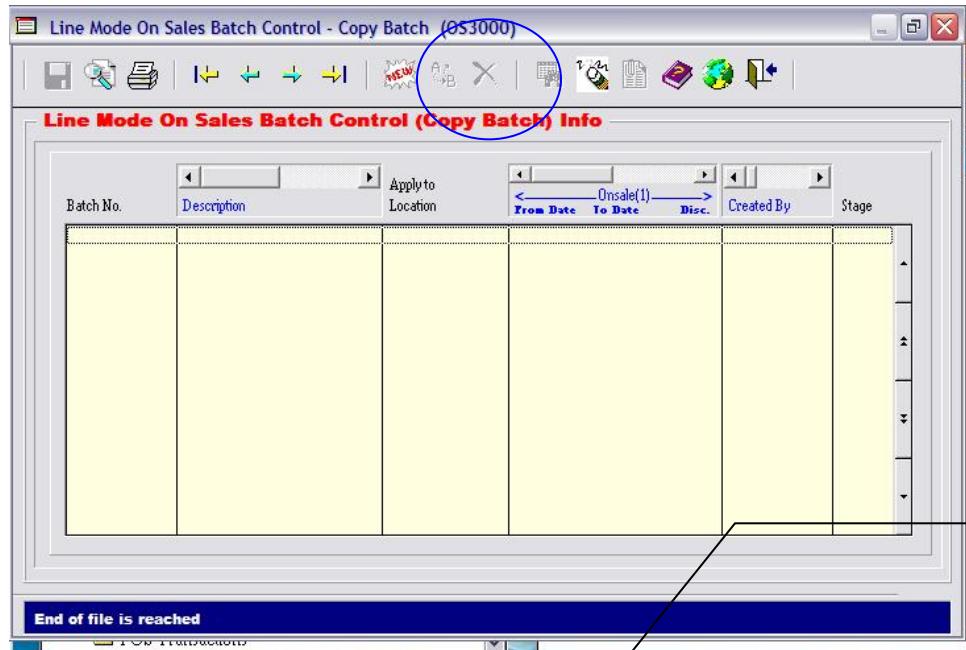
The screenshot shows a software interface titled "Group Mode On Sale Price Batch Control (OS2000)". The main window is titled "Group Mode On Sale Price Batch Information". It contains a table with columns: Batch No., Description, Apply to Location, From Date, To Date, Disc., Created By, and Stage. A row in the table has the following values: 01, 2006 Easter Promotion, ALL, 01/01/2010, 01/01/2011, 33.00%, 15/11/2005, and std. A "Validate" button is also present. A "Warning" dialog box is overlaid on the table, containing a yellow exclamation mark icon, the text "Are you sure to proceed posting?", and two buttons: "Yes" and "No".

Step 5: Batch Posting

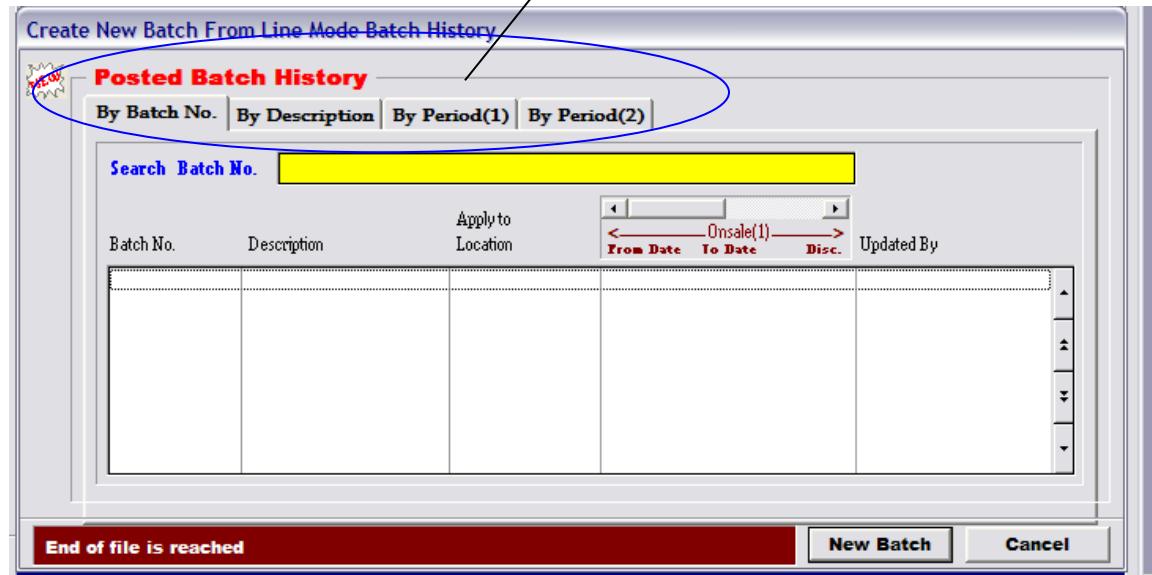
This is the final step to "confirm" the transactions in the system. After posting, the transaction data will become effective and write to transaction journal permanently without change. Change can only be done by adding a new transaction / record to over-ride the previous result, not previous transaction deletion.

5.4.10.3 Line Mode – Copy Batch (optional Module)

This is option module to allow user able to "copy" from On-Sales History records and put into On-Sales again after editing.



User could retrieve on-sales history data from these parameters and copy to a new batch for user editing before confirmation



5.4.11 Promotion Mix & Match (Optional Module)

This is a process allows user to set up special promotion events other than conditions specified in “On-Sales Maintenance” process in last section. This module can setup promotion events in a self defined “mix & match” free style - rather than in a straight promotion format as in “On-Sales Maintenance”.

The Promotion Mix & Match Optional Module is now in her Third Generation release under **ChainStorePlus v6.6** since the module first launched in year 2000.

In this updated generation, the Mix & Match module do allows “Except” rules, “Must Hit” rules, items conflict, plus auto best price calculation in POS sales when more than one promotion conditions are found.

5.4.11.1 The Promotion Tables

In order for the “Promotion Mix & Match” process to work properly, a few of ground work need to be done before hand. Users may need to define “Promotion Discount Tables” that describes particular discount promotion requirements, such as which discount conditions may apply only under some controlled circumstances - for example 3 x pcs. for \$100, or more discount controls for customer if purchase over a target amount or qty... etc. Some example of the setting is illustrated as follows:

5.4.11.1.1 Promotion Discount Table

The screenshot shows a software application window titled "Promotional Discount Information (MF6003)". The window has a dark blue header bar with various icons for file operations like save, print, and search. Below the header is a light blue navigation bar with icons for back, forward, and search. The main area is a table with the following columns: "M & M Discount Code", "Description", "Last Modified Date", and "Last Modified User". The table contains the following data:

M & M Discount Code	Description	Last Modified Date	Last Modified User
1000FOR3	\$1000 For 3 pcs		
600FOR2	\$600 For 2 pcs	27/09/2020	sxd
800FOR3	\$800 For 3 pcs		
BULKAMT	Bulk Purchase by Amount		
BULKQTY	Bulk Purchase by Sales Volume		
NET	Net Description	08/10/2020	789

Example (I) for Setting up Promotion Discount Table

Disc %	Disc Amt.	Purchase Amt.	Amt. \$ >=	Qty >=
1		20.00		1
2		30.00		2
3		40.00		3
4				
5				
6				
7				

This screen example illustrates the setting of:

- ❖ The customer will obtain strict 10% discount if purchase qty one(1) ;
- ❖ The customer will obtain strict 20% discount if purchase qty two(2) ;
- ❖ The customer will obtain strict 30% discount if purchase qty three(3) ;

But this Table does not tell what products will get this discount. Therefore user needs a Product Table and Formulae setting to put the whole thing work together.

Example (II) for Setting up Promotion Discount Table with "Every Option"

Disc %	Disc Amt.	Purchase Amt.	Amt.\$ >=	Qty >=
1		20.00		1
2		30.00		2
3		40.00		3
4				
5				
6				
7				
8				
9				
10				

For the same discount setting as in Example (I) but Check to the "For every exact N_th Qty" box on the Upper Right corner, the promotion result will become as follows:

- ❖ The customer will obtain 10% discount on the first item purchased;
- ❖ The customer will obtain 20% discount on the second item purchased;
- ❖ The customer will obtain 30% discount on the third item purchased;

Please note this table tells only part of the promotion story – it describes the discount conditions only.

User may need further definition from additional tables, which provide conditions to apply such as which specific products could enjoy the discount, who are the customer(s) eligible for the discount, any possible control on selected items, and moreetc. to form a unique promotion event.

This Promotion Discount Table may therefore need to work together with other formulae that further described in next section.

5.4.11.1.2 Promotion Member Table

This is the table for user to define what particular “Member Types” may enjoy certain particular promotion events. This “Promotion Member Table” again will log down only who are the customer(s) may be able to enjoy special discount under some promotion events. Once again, this table need to work together with Other Promotion Tables and to form a meaningful promotion event.

M & M Member Code	Description	Last Modified Date	Last Modified User
99STAFF	99 Clearance Promotion For Staff Only		
FULL	Full Member List	05/10/2022	sxd
MEM	Member Only List		
STAFF	Staff Only List		

Member Disc. Code: MEM

Description: Member Only List

Type	Description
1 DIAMOND	Diamond
2 GOLD	Gold
3 SILVER	Silver
4	
5	
6	
7	
8	

5.4.11.1.3 Promotional Product Table

This is the table for user to define what particular “Products” may want to put on promotion. This “Promotion Product Table” again will log down only those Products that going to be promoted, but have no description on how much the discount will be offered and as well in what conditions. This table need to work together with “Promotion Discount Table” or more others to form a meaningful promotion event.

Product Code	Description
PROD02	All Cat exclude item 40-50
PROD03	Easter festival
PROD04	Halloween Promotion
PROD05	Single Product Promotion
PROD06	Special Product Line Gift
PROD07	Shirts items from GMT Cat

User could either create new product promotion rules by clicking on "NEW" button on top bar, or double mouse click in the highlight row for product selection rules modification.

Promotion Product Maintenance Process:

The screenshot shows the 'Promotional Product Maintenance (MX6004)' screen. At the top, there are buttons for Save, Clear, Validate, Back, and Sanyo.. Below the title, a product code 'PROD04' and a description 'Halloween Promotion' are displayed. The main area is titled 'Promotional Product Information'. It features a grid for defining promotion groups and a separate section for exceptions.

Group Definition Grid:

H. SEQ.	MUST	Qty	Category	Sub Cat.	Brand	Season	Item Code	Color	Size
1	...	0							
2	...						001 2000004	001 2000004	
3	...						001 2000009	001 2000009	
4	...						001 2000015	001 2000015	
5	...						100AC HJC004	100AC HJC004	
6	...								
7	...								
8	...								
9	...								
10	...								
11	...								
12	...								
13	...								
14	...								
15	...								
16	...								

Exception Rule Section:

From Item	To Item	Color	Size
001 2000004	001 2000004		
001 2000009	001 2000009		
001 2000015	001 2000015		
100AC HJC004	100AC HJC004		

Annotations:

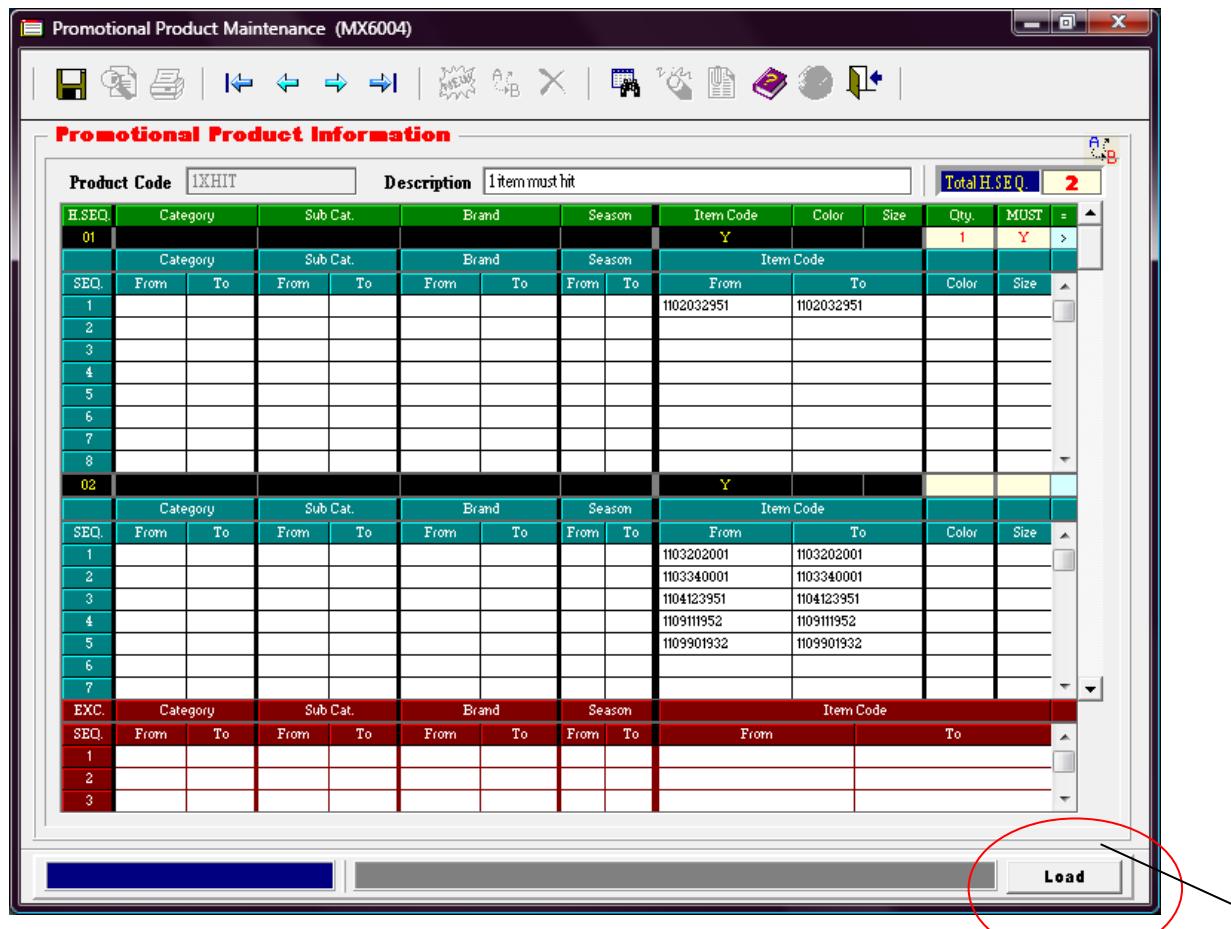
- User could define one(1) or more than one sets of category, sub-category, brand and season groups in range here for product promotion.
- These parameters allow user to set the MUST hit and Qty conditions of the promotion.
- User could define a group of specific products down to color and size (SKU level) for promotion.
- This is the "EXCEPTION" Rule section that allow user to exclude products among the groups in above.

This screen example illustrates the setting of:

- ❖ These four(4) particular products will be on promotion;
- ❖

User may want to set the promotion products by “Groups” instead of individual items. Therefore columns on the left could allows user to set promotion items by Category, sub-category, brand and season.

Screen Sample (II)



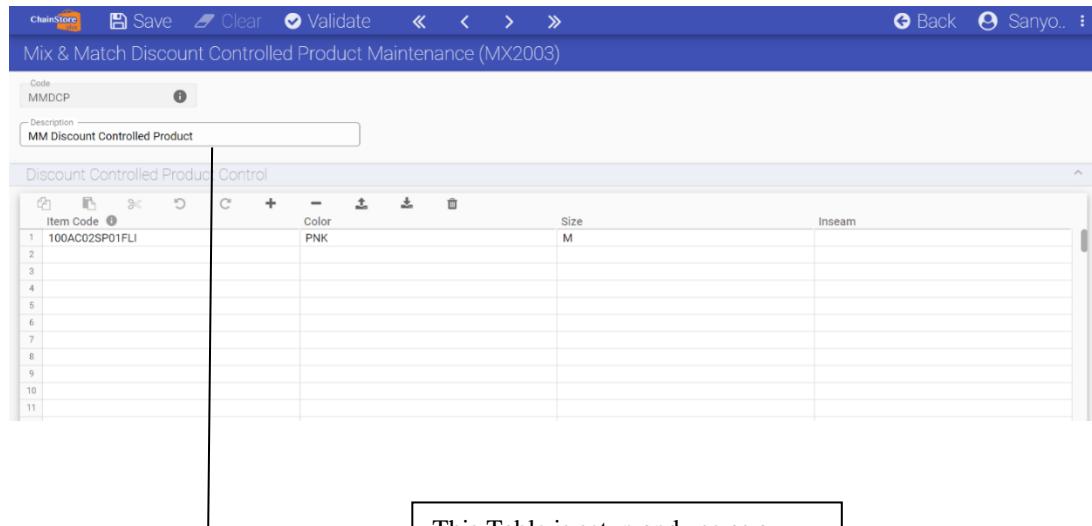
This screen example illustrates the setting of:

- ❖ These six(6) particular products will be on promotion;
- ❖ Among these six(6) products, the item "1102032951" is defined as a MUST hit item. Therefore this promotion rule is hit and chosen only when this item is present;
- ❖ For example if this promotion product rule is going together with a Discount Rule of "\$100 for 3 pc.", it means the 3 purchase items must be within these 6 dedicated products BUT the item "1102032951".MUST be included

This LOAD button allows TEXT file import into the table under a fixed format. The exact file format please consults Sanyo Extended Support Consultant for details.

5.4.11.1.4 Mix & Match Discount Control Product Table (有配搭無折扣貨號表格)

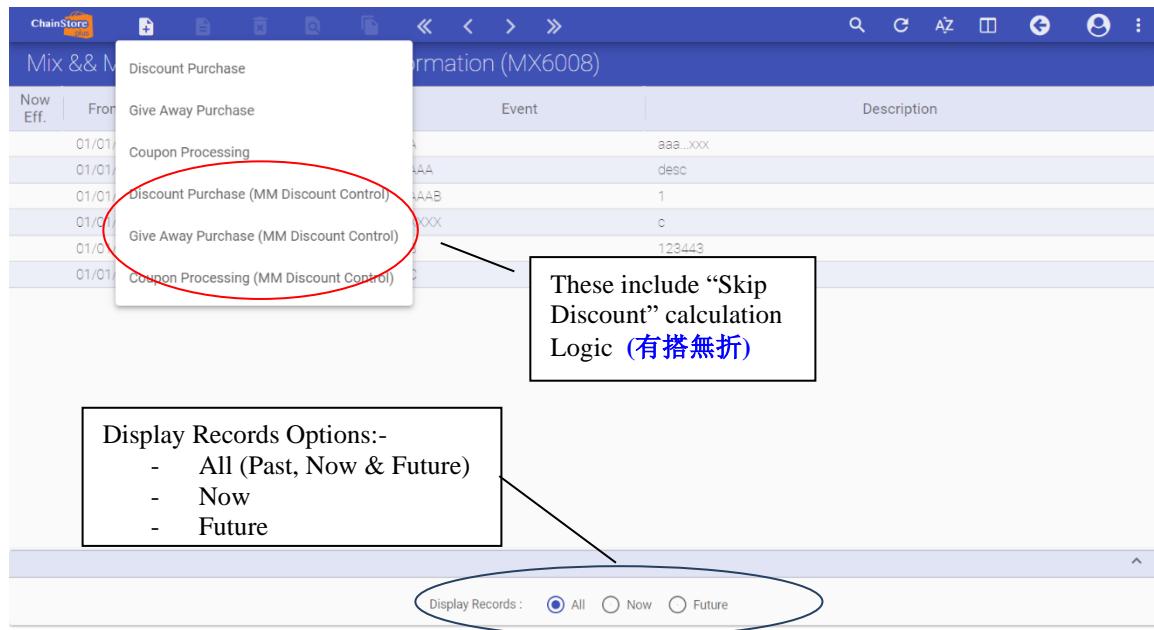
This is a special product table defined ONLY for Mix and Match promotion event. ALL products defined under this table will cause the Mix and Match calculation to accept as VALID Mix & Match Items but “**SKIP**” the products’ own Mix & Match discount rules. (有配搭無折扣貨號表格)



This Table is setup and use as a “special promotion set code” attached to Mix & Match promotion events, for example building a Special Promotion for a specific group of customer (i.e. for Gov’t Staff only).
In order to activate this specific Promotion Event, POS user need to manual activate this “Promotion Set Code” in POS when Gov’t staff is making purchase at shop.

5.4.12 Promotion Formula Maintenance

After all the necessary promotion tables are ready as illustrated previously, we could start to “link” them up together and give a meaningful calculation formulae to form different Promotion Events as planned.



The Mix & Match Promotion Formula is divided into 2 main groups:

- The Old Normal Mix & Match process, and
- The New Mix &Match process with “SKIP discount product controls” (有搭無折)

The New Mix &Match “SKIP discount product controls” process (有搭無折) has included ALL promotion calculation functions of OLD Mix & Match plus new feature of “Skip Discount” (有搭無折) logic.

Both set of Mix and Match processes involved 3 major categories of calculation:

1. Discount Purchase
2. Give Away Purchase, and
3. Coupon Purchase

Example:

Discount Purchase – it is a kind of promotion that when customer buys more than certain items/amount, the customer will enjoy a certain discount rate.

Example: buy 3 for \$100,
 buy over \$500 get 10% discount;
 buy 1 x qty gets 10% discount, 2 x qty get 20%, 3 x qty get 30% ..etc.

Give Away Purchase – it is a kind of promotion that if customer buys specific product(s) will enjoy promotion of Extra Product(s) with or without addition cost.

Example: buy one get one free; or
 buy one get other one at \$1 or 50% off
 buy more than \$500 gets free gift ... and etc.

Coupon Processing - set up a Discount Coupon that is for specific product(s) purchase only.

Example:

- 15% discount coupon valid for purchase of the Coffee Mug only; or
- \$100 discount off from selling price (could be set for List Price or current price) if purchase of one Tee Shirt and a Short.... Etc.

5.4.13 The Best Price Automation

The Mix & Match Promotion Conflict Handling in version 6.4.3 or later:

When creating Mix & Match formula, beware if there is conflict between promotion events.

Under the conflict conditions, *for System version v6.4.2 or earlier*, the system cannot determine which event should be applied if conflict, therefore all the conflict promotions may pop-up and display on POS screen and ask for POS user's final decision.

For System version v6.4.3 or later, the system has option set for Best Price Automation, in which the POS system will auto calculate and return with a "Best Price" result as default, plus option with manual override allowed.

Promotion Conflict Reminder

Promotion Conflict and Best Price calculation may slow down POS operation depending on conflict complication and hardware resource respectively. By manual selection, most important, may increase the chance of operational errors in manual decision process.

5.4.14 Promotion Formulae Maintenance – The Discount Purchase

The Discount Purchase Promotion is a promotion event that when customer purchase to a pre-set qty or amount then the customer will enjoy certain discount rates.

Promotion Event Header Set Up (The Event Folder)

Discount Purchase Formulae SET UP Sample

User has to give a name for the promotion type and Event code as illustrated

User need to define where and when this promotion event will be effective.

ChainStore Save Clear Validate < < > >>

Mix & Match Promotion Formula - (For Discount Purchase) (MX6008)

Type D001

Event 2 FOR \$600

Description 2pcs for \$600

Event Properties Conditions

All Country Country Select Price Group Group Select Location Location Select

Effective Period

From Date/Time 01 / 01 / 2023 00 : 00 : 00 To Date/Time 31 / 12 / 2023 00 : 00 : 00

Daily Time

The Event Set Up

Type the name of “*Promotion Type*” and “*Promotion Event*”, enter description of the promotion. In the Promotion Group, you can select which country or group or location are apply this formula, by default the formula is apply to all shops. For effective period, enter the starting day and end day of the promotion. You can also enter the start time and end time, if you click the box of “*Daily Time*” the formula will apply during the time you enter in that period.

Promotion Event Formulae Set Up (The Properties Folder)

This is to the discount % of the formulae "[Apply Discount by](#)"

Discount Amount\$ - This is to define the specific discount \$ amount of this promotion event, if applicable

Type: D001
Event: 2 FOR \$600
Description: 2pcs for \$600

Event Properties Conditions

Apply Discount By

On Price
Price Type: L - List Price

At Purchase Value
All Value
>= Value: 0.00

Disc. Rate %: 0.00
Disc. Amt. \$: 0.00
At Purchase Amt. \$: 0.00
Discount Table: 600FOR2

Discount Table – The discount qty and % conditions are set in a Pre-defined Discount Table as attached.
The Detail of Discount Table setup please refers to previous section "Promotion Discount Table".

At Purchase Amount\$ - Or user could set to the promotion product sell at a fixed price, such as \$299.00, if promotion conditions is satisfied.

Promotion Event Formulae Set Up (The Conditions Folder)

This is the button allows “All” products in your company will offer promotion discount as specified

Allows user to define which customer type(s) could enjoy this Mix & Match promotion as specified.

ChainStore Plus Save Clear Validate Back Sanyo.. :

Mix & Match Promotion Formula - (For Discount Purchase) (MX6008)

Type: D001
Event: 2 FOR \$600
Description: 2pcs for \$600 GL Type

Event Properties Conditions

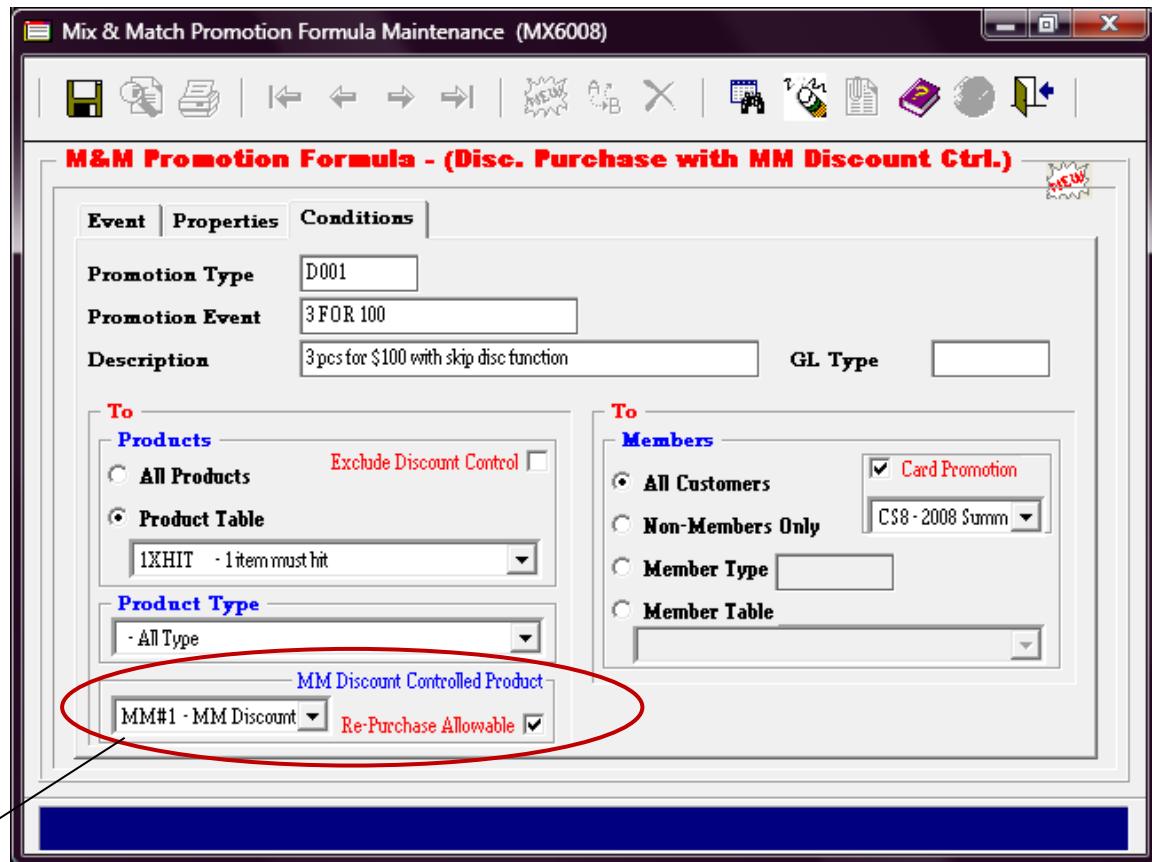
To Products	To Members
<input type="radio"/> All Products <input checked="" type="radio"/> Product Table PROD04 ... Product Type: - All Type	<input type="checkbox"/> Exclude Discount Control <input checked="" type="radio"/> All Customers <input type="radio"/> Non-Members Only <input type="radio"/> Member Type: <input type="text"/> <input type="radio"/> Member Table: <input type="text"/> <input checked="" type="checkbox"/> Card Promotion C08 ...

Attach a pre-defined valid Product table for this promotion as discussed in prior section

The Discount Controlled Items defined in Item Master will be excluded from this promotion if this Box is checked

- The check box indicates this M&M promotion is specially made for the selected Promotion Card (set) only (user activated in POS);
- Blank for regular case apply in general

**Promotion Event Formulae Set Up with Skip Discount Option (有配搭无折扣)
(The Conditions Folder)**



This is the product table that allows some products to be included as valid Mix & Match items BUT SKIP discount calculation. (有配搭无折扣)

Important:

The “Skip Discount” rules in M&M promotion are working only under some specific conditions, ie. % based discount etc. - Not ALL promotion discount rules can be applied.

5.4.15 Promotion Formulae Maintenance – The Give Away Purchase

Promotion Event Header Set Up

Create Give Away Purchase formula is a kind of promotion say “*Buy A get B at extra value or free*”. The screen will display as above, there is four tabs in the interface.

The screenshot shows a software interface for managing promotion formulas. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. The title bar reads "Mix & Match Promotion Formula - (For Give Away Purchase) (MX6008)". Below the title, there are fields for "Type" (P001), "Event" (EXTRA_AT_\$.1), and "Description" (Buy 1 Get 1 Extra at \$1). A "GL Type" button is also present. A section titled "Promotion Group" contains a "Event" button, which is circled in red. Other buttons in this section include "Purchase", "Extra", and "Plus Disc./Cond.". Below this, there is a row of radio buttons for selecting criteria: "All" (selected), "Country", "Country Select", "Price Group", "Group Select", "Location", and "Location Select". A "Effective Period" section includes date/time pickers for "From Date/Time" (01 / 01 / 2023 00 : 00 : 00) and "To Date/Time" (31 / 12 / 2023 00 : 00 : 00), and a "Daily Time" checkbox.

1. Purchase Folder Setup

This is the Folder to allow user to define what kind of Products to be purchased with set conditions in order Customer could get "EXTRA" product(s) which to be defined in the next "Extra" Folder page.

For the sample case of "*Buy 1 get 1 Extra at \$1*", the purchase type is used to control the amount of money or quantity, say if you want to create a formula that "*Buy 1 get 1 Extra at \$1*", then you need to type "3" into the "Qty".

The Product Table is defining in the same manner before and attach as controlled Promotion Items in the event.

Mix & Match Promotion Formula - (For Give Away Purchase) (MX6008)

Type: P001
Event: EXTRA_AT_\$.1
Description: Buy 1 Get 1 Extra at \$1

Purchase

Value

A - All Value
E - Every Value
U - Up To Value

0.00

Quantity: 0

Of Product

Any
Product Table

Exclude Discount Control
Re-Purchase Allowable

Product Type: - All Type

Purchase Type: This selection must work together with the input parameter of "Amount\$ or Qty";

A – All Value = condition of All value of Amt\$ or Qty will satisfy;

E - Every Value = such as Every one(1) qty or every \$500 will satisfy the conditions. Therefore this setting may allow the conditions occur more than once; such as customer purchases \$1,200 will make this conditions occur two times;

U – Up to Value = such as Up to one(1) qty or Up to \$500 will satisfy the conditions. Therefore this setting allows the condition occur ONLY once; such as customer purchases \$1,200 will make the conditions occur only ONE time;

2. The Extra Folder

You can set what "Extra Product" the customer can get if the previous "Purchase" conditions satisfied. In the "Products" field, you can choose either the "Same Product", "same product set", "Item Code", or attach a "Product Table" as previously defined.

In the "Extra Qty." field, it set the Extra Quantity the customer can get;

and for "Charge At", you can set the customer need to pay for this Extra Item, or at certain amount or at a discount rate.

The screenshot shows the 'Mix & Match Promotion Formula - (For Give Away Purchase) (MX6008)' screen. At the top, there are buttons for Save, Clear, Validate, and navigation arrows. On the right, there are Back, Sanyo.., and other system icons. The main area has fields for Type (P001), Event (EXTRA_AT_1\$), Description (Buy 1 Get 1 Extra at \$1), and GL Type. Below these, there are tabs for Event, Purchase, Extra (which is circled in blue), and Plus Disc./Cond. Under the Extra tab, the 'Will Get Extra Products' section is visible. In the 'Extra' section, the 'Extra Quantity' is set to 1. Under 'Charge At', the 'Free of Charge' option is selected. Other options like 'Amount \$' and 'Discount %' are also present but not selected.

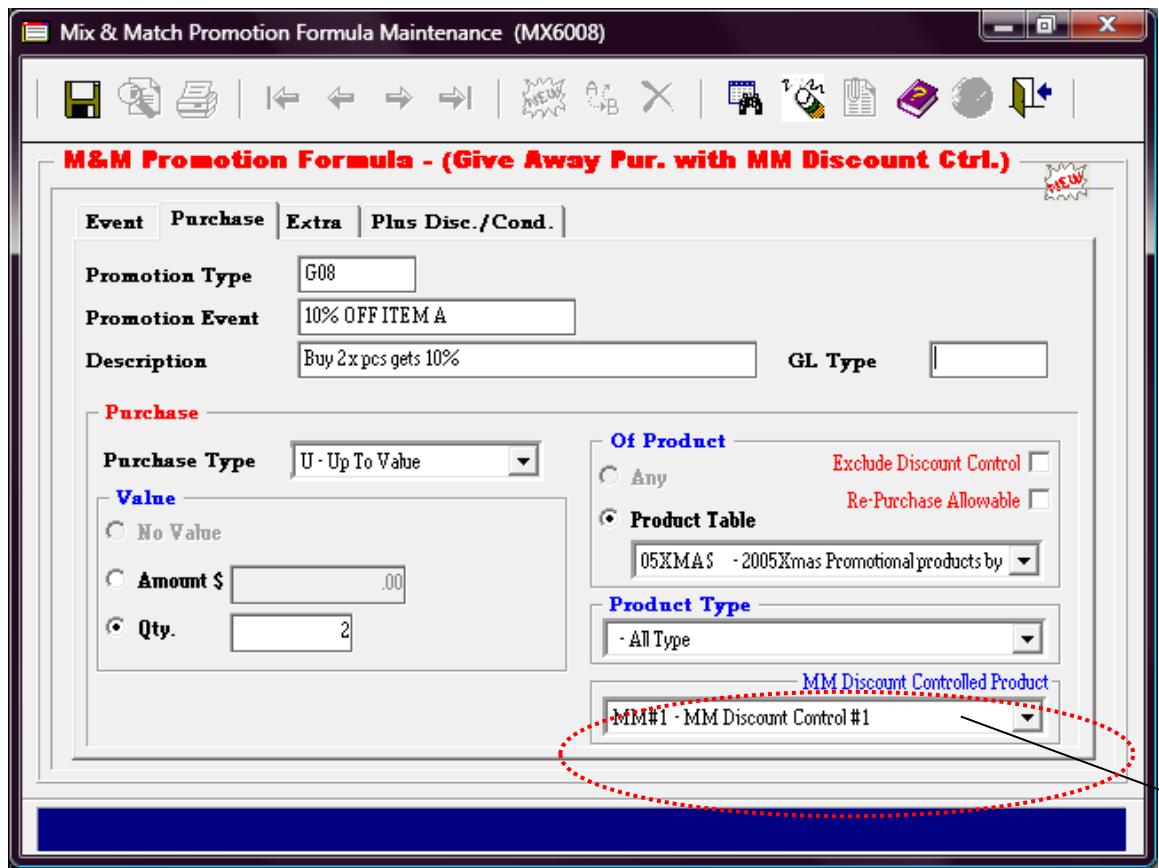
4. Plus Disc./Condition Folder

The function of “Plus Disc./Condition.” Folder is similar as the “Discount Purchase”. User could add extra MORE discounts in the “*Discount By*” field for this promotion

To Member Parameter: user could set who are the customers able to enjoy this Promotion – All Customer, Walk-in Customer Only (Non-Member), a Specific Customer Type, or by Member Table which is previously defined.

The screenshot shows the 'Mix & Match Promotion Formula - (For Give Away Purchase) (MX6008)' screen. At the top, there are buttons for Save, Clear, Validate, Back, and Sanyo. Below the title, there are fields for Type (P001), Event (EXTRA_AT_\$1), and Description (Buy 1 Get 1 Extra at \$1). A 'GL Type' button is also present. The main area has tabs for Event, Purchase, Extra, and Plus Disc./Cond. (which is circled in blue). Under 'Plus Discount On Total', there is a 'Discount By' section. This section includes a 'None' radio button and three other options: 'Disc. Rate %' (0.00), 'Disc. Amt. \$' (0.00), and 'Discount Table'. To the right, under 'To Members', there are five radio buttons: 'All Customers' (selected), 'Non-Members Only', 'Member Type' (with a text input field), 'Member Table' (with a text input field), and 'Card Promotion' (with a checkbox).

**The Give Away Promotion Event Set Up with Skip Discount Option (有配搭无折扣)
(The Conditions Folder)**



This is the product table that allows some products to be included as valid Mix & Match items BUT SKIP discount calculation. (有配搭无折扣)

Important:

The “Skip Discount” rules in M&M promotion are working only on some restricted conditions, ie. % based discount etc. - Not ALL promotion discount rules can be applied.

5.4.16 Promotion Formulae Maintenance – The Coupon Processing

Mix & Match Coupon Processing - set up a Discount Coupon that is for specific product(s) purchase only.

Example:

- 15% discount coupon valid for purchase of the Coffee Mug only;
- or \$10 discount off from selling price if purchase of one Tee Shirt and a Short..

The Event Folder Setting

The screenshot shows a software interface for managing promotion formulas. At the top, there are buttons for Save, Clear, Validate, and Back. The main title is "Mix & Match Promotion Formula - (For Coupon Processing) (MX6008)". Below the title, there are several input fields and dropdown menus:

- Type: CPN01
- Event: ITEM COUPON #1
- Description: Coupon Promotion-10 on Net
- Conditions: GL Type
- Promotion Group: (dropdown menu)
- Event: (radio button selected)
- Purchase: (radio button)
- Coupon: (radio button)
- Conditions: (radio button)
- Location: (radio button)
- Location Select: (radio button)
- Effective Period: (date range from 01/01/2023 to 31/12/2023)
- Daily Time: (checkbox)

- Same setting philosophy as of the other two Promotion Events.

The Purchase Folder Setting

This Folder is functioning and appearing exactly the same as the Purchase Folder of Mix & Match "Give Away Purchase" Promotion.

It allows user to define the conditions for what kind of Products need to be purchased when Customer is make the purchase together with the "Coupon" which will be set for conditions in next "Coupon" Folder page.

Example as in the Screen display: \$10 discount off from NET selling price if purchase of any product from the "Lunar Year Item Promotion" Product Table as defined.

ChainStore Save Clear Validate < < > >> Back Sanyo... :

Mix & Match Promotion Formula - (For Coupon Processing) (MX6008)

Type: CPN01

Event: ITEM COUPON #1

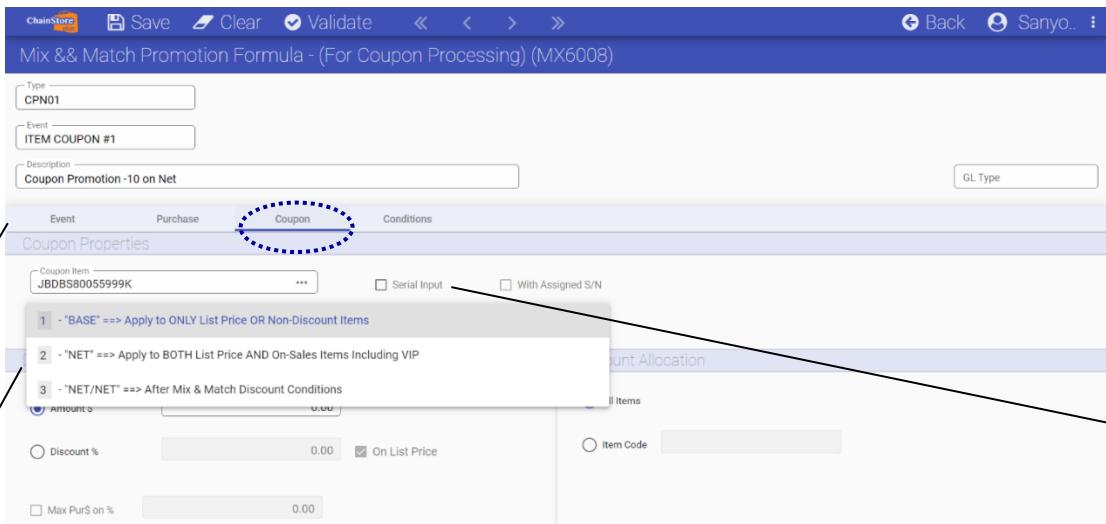
Description: Coupon Promotion -10 on Net

GL Type

Event	Purchase	Coupon	Conditions
Value	Purchase		Of Product
Purchase Type: A - All Value		<input type="checkbox"/> Any	
<input checked="" type="radio"/> No Value		<input type="checkbox"/> Exclude Discount Control	
<input type="radio"/> Amount \$ 0.00 On Memo Net <input checked="" type="checkbox"/>		<input checked="" type="radio"/> Product Table PROD06 ...	
<input type="radio"/> Quantity 0		Product Type: - All Type	

The "Coupon" Folder Setting

Example as in the Screen display : \$10 discount off from NET selling price if purchase of any product from the "Lunar Year Item Promotion" Product Table as defined.



Coupon Type: This is to define the Type of Coupon with following conditions:

1. **BASE** = the discount is applied to List Price or non-discount items ONLY; the on-sales or promotion items do not consider;
2. **NET** = the discount is applied to both non-discount items & on-sales Items EXCEPT Mix & Match promotions, where Member Discount is considered;
3. **NET/NET** = the discount is applied to Net Amount including Mix & Match Promotion

The Coupon Item

- In order to activate this M&M Coupon Discount Process, user needs to define a product item in Item Master Table using Stock Indicator as "**S – Coupon M & M Item**" which is used in here as M&M Coupon Item code to represent the Mix & Match discount as set when POS sales apply.

Serial Number

- This tell the Coupon is requiring serial number input in POS when Redemption.

The "Condition" Folder Setting

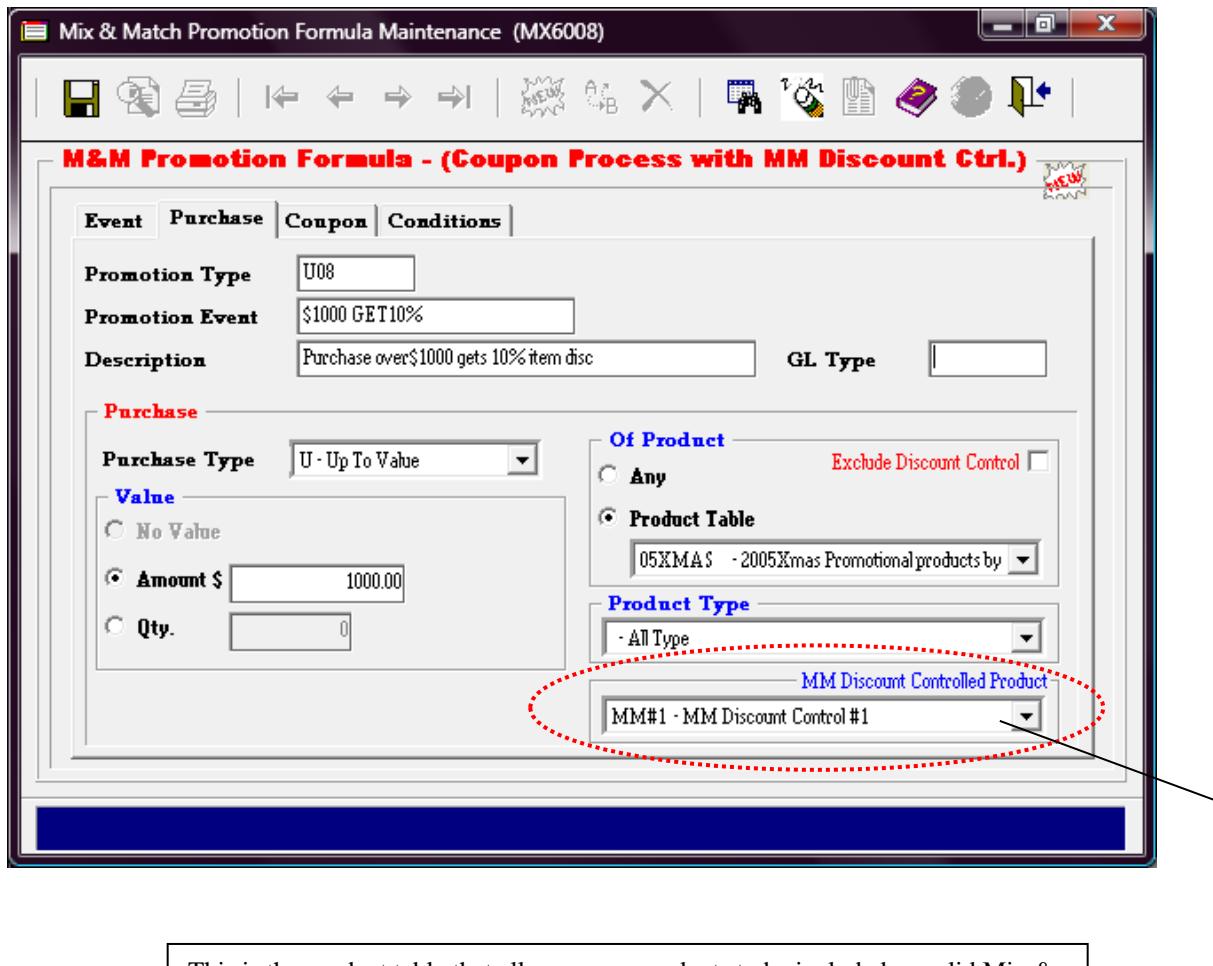
This Folder is functioning and appearing very much the same as the rest of other Mix & Match Promotion event.

It allows user to define the conditions for whom the Customers can enjoy this Coupon Discount as set in this event.

Example as in the Screen display : All Customer could enjoy the Coupon Discount in this event.

The screenshot shows a software interface for managing promotional formulas. At the top, there are standard toolbar buttons: ChainStore, Save, Clear, Validate, and navigation arrows. The main title is "Mix & Match Promotion Formula - (For Coupon Processing) (MX6008)". Below the title, there are input fields for Type (CPN01), Event (ITEM COUPON #1), and Description (Coupon Promotion -10 on Net). To the right of the description field is a GL Type dropdown. A horizontal bar below these fields includes tabs for Event, Purchase, Coupon, and Conditions, with the Conditions tab circled in blue. Under the Conditions tab, there is a section titled "To Members" containing five radio button options: "All Customers" (selected), "Non-Members Only", "Member Type" (with a dropdown menu), "Member Table" (with a dropdown menu), and "Card Promotion".

The M & M Coupon Processing Promotion Event Set Up with Skip Discount Option (有配搭无折扣)



This is the product table that allows some products to be included as valid Mix & Match items BUT SKIP discount calculation. (有配搭无折扣)

Important:

The “Skip Discount” rules in M&M promotion are working only on some restricted conditions, ie. % based discount etc. - Not ALL promotion discount rules can be applied.

Some Data / Calculation Samples when BOTH Discount controlled items(有配搭無折扣) and Auto Best Price Logic are applied:

Case 1 : (Discount purchase)

- (i) Purchase any 2 items or more, all items can get extra 15% off

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	2nd	15%	\$510	
P001	\$399	(i)	1st		\$399	\$909

Case 2 : (Discount purchase)

- (i) Purchase any items, 2 or more can get extra 15% off

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	3 rd	15%	\$510	
A002	\$700	(i)	2 nd (highest prx)	15%	\$595	
P001	\$399	(i)	1 st (promotion)		\$399	\$1504

Case 3: (Discount purchase – Using repeat option)

- (i) Purchase any items, 1st item can get extra 10% off, 2nd item can get extra 20% off (This must use repeat option in M&M event)

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sorting order for Promotion item always as 1st item. Must use repeat option in M&M event

Sorting order for normal item highest price first

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	1 st (2 nd round)	10%	\$540	
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)	1 st (promotion)		\$399	\$1499

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)	1 st (promotion)		\$399	\$959

Sample 3:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	2 nd (2 nd round)	20%	\$480	
P001	\$399	(i)	1 st (promotion)		\$399	
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)	1 st (2 nd round)		\$399	\$1838

Case 3A (Discount purchase – Using onward option)

(i) Purchase any items, 1st item can get extra 10% off, 2nd item can get extra 20% off, 3rd item or above can get extra 30% off ... etc (This must use onward option in M&M event)

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sorting order for Promotion item always as 1st item (only count as one item in sorting list). Must use onward option in M&M event

Sorting order for normal item highest price first

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	3 rd	30%	\$420	
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)	1 st (promotion)		\$399	\$1379

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)	1 st (promotion)		\$399	\$959

Sample 3:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	3 rd	30%	\$420	
P001	\$399	(i)	1 st (promotion)		\$399	
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)			\$399	\$1778

Case 4: (Discount purchase)

(i) Purchase any items, 1st item can get extra 10% off, 2nd item and more can get extra 20% off

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)	3 rd	20%	\$480	
A002	\$700	(i)	2 nd (highest prx)	20%	\$560	
P001	\$399	(i)	1 st (promotion)		\$399	\$1439

Case 5 : (Discount purchase)

Mix & Match event :

- (i) Any purchase can get 20% off on item A001
- (ii) Any purchase can redeem item A at \$399

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
P001	\$399				\$399	\$879

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
A001	\$600	(ii)			\$399		
P001	\$399				\$399		\$798**

** If 'Best price logic available

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
A001	\$600	(i)			\$600		
A001	\$600	(i)		20%	\$480	\$1080	

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
A001	\$600	(ii)			\$600		
A001	\$600	(ii)			\$399		\$999**

** If 'Best price logic available

Case 6 : (Discount purchase)

Mix & Match event :

- (i) Purchase item A001 or P001 can get extra 20% off on item B001

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
B001	\$700	(i)		20%	\$560		
P001	\$399	(i)			\$399	\$959	

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
B001	\$700	(i)		20%	\$560		
A001	\$600	(i)			\$600	\$1160	

Case 7 : (Discount purchase)

Mix & Match event :

- (i) Purchase any items can get extra 20% on item A001
- (ii) Purchase any 2 items or more, all items can get 15% off

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
A001	\$600	(i)		20%	\$480		
P001	\$399				\$399		\$879**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
A001	\$600	(ii)		15%	\$510		
P001	\$399				\$399	\$909	

** If 'Best price logic available

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total	
A001	\$600	(i)		20%	\$480		
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595		
P001	\$399		1 st (Promotion)		\$399		\$1474**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)		20%	\$510	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
P001	\$399		1 st (Promotion)		\$399	\$1504

** If 'Best price logic available

Sample 3:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
B002	\$600	(ii)		15%	\$510	
P001	\$399		1 st (Promotion)		\$399	\$1984**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		15%	\$510	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
B002	\$600	(ii)		15%	\$510	
P001	\$399		1 st (Promotion)		\$399	\$2014

** If 'Best price logic available

Case 8 : (Discount purchase)

Mix & Match event :

- (i) Purchase any items can get extra 20% off on item A001
- (ii) Purchase any items 2nd item or more can get extra 15% off

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
P001	\$399				\$399	\$879**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)		15%	\$510	
P001	\$399				\$399	\$909

** If 'Best price logic available

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
B001	\$700	(i)			\$700	\$1180**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)	2 nd	15%	\$510	
B001	\$700	(ii)	1 st (highest prx)		\$700	\$1210

** If 'Best price logic available

Sample 3:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
P001	\$399		1 st (Promotion)		\$399	\$1474**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)		15%	\$510	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
P001	\$399		1 st (Promotion)		\$399	\$1504

** If 'Best price logic available

Sample 4:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
B002	\$500	(ii)	3 rd	15%	\$425	
P001	\$399		1 st (Promotion)		\$399	\$1899**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)	3 rd	15%	\$510	
B001	\$700	(ii)	2 nd (highest prx)	15%	\$595	
B002	\$500	(ii)	4 th	15%	\$425	
P001	\$399		1 st (Promotion)		\$399	\$1929

** If 'Best price logic available

Case 9 : (Discount purchase)

Mix & Match event :

(i) Purchase any items can get 25% off on item A001

(ii) Purchase any items, 1st items can get extra 10% off, 2nd item can get extra 20% off (Repeat option in M&M event)

Discount controlled item :P001 promotion price \$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		25%	\$450	
P001	\$399				\$399	\$849**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)	2 nd (highest prx)	20%	\$480	
P001	\$399		1 st (promotion)		\$399	\$879

** If 'Best price logic available

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		25%	\$480	
B001	\$700	(i)			\$700	\$1150

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)	2 nd	20%	\$480	
B001	\$700	(ii)	1 st (highest prx)	10%	\$630	\$1110**

** If 'Best price logic available

Sample 3:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		25%	\$450	
B001	\$700	(ii)	2 nd (highest prx)	20%	\$560	
P001	\$399		1 st (Promotion)		\$399	\$1409**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)	1 st (2 nd round)	10%	\$540	
B001	\$700	(ii)	2 nd (highest prx)	20%	\$560	
P001	\$399		1 st (Promotion)		\$399	\$1499

** If 'Best price logic available

Sample 4:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		25%	\$450	
B001	\$700	(ii)	2 nd (highest prx)	20%	\$560	
B002	\$500	(ii)	1 st (2 nd round)	10%	\$450	
P001	\$399		1 st (Promotion)		\$399	\$1859**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)	1 st (2 nd round)	10%	\$540	
B001	\$700	(ii)	2 nd (highest prx)	20%	\$560	
B002	\$500	(ii)	2 nd (2 nd round)	20%	\$400	
P001	\$399		1 st (Promotion)		\$399	\$1899

** If 'Best price logic available

Case 10: (Give Away Purchase)

Mix & Match event:

- (i) Purchase any items can get extra 20% on item A001
- (ii) Purchase any items can get extra 10% off on item B001

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
B001	\$700	(ii)		10%	\$630	
P001	\$399				\$399	\$1509

Sample 2:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		20%	\$480	
B001	\$700	(i)			\$700	\$1180**

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(ii)			\$600	
B001	\$700	(ii)		10%	\$630	\$1230

** If 'Best price logic available

Case 11: (Coupon process)

Mix & Match event:

- (i) Memo net amount over \$2000 and get extra 5% off

Discount controlled item :P001 promotion price\$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600	(i)		5%	\$570	
B001	\$700	(i)		5%	\$665	
P001	\$399				\$399	
B002	\$500	(i)		5%	\$475	\$2109

Case 11: (Coupon process)

Mix & Match event:

(i) Memo net amount over \$2000 and less \$200

Discount controlled item : P001 promotion price \$399 (No count as M&M, only a condition checking)

Sample 1:

Item	Current price	M&M event	M&M Sorting	M&M Disc.	Net Amount	Memo Total
A001	\$600				\$600	
B001	\$700				\$700	
P001	\$399				\$399	
B002	\$500				\$500	\$2199
		(i)			-200	\$1999

Remarks : No member extra discount will be applied on Discount controlled item

- End of Data Samples -

5.5 Customer Loyalty Module (Optional Module)

In order for Retailer able to offer flexible Bonus Point calculation to member customers, the system is providing a 'Sales to Bonus Point Calculation Table' that allows users has better flexibility to formulate the Bonus Point and Redemption calculation content on demand.

Bonus Points Calculation:

The Bonus Point general calculation mechanism allows user to "give" bonus points to VIP Member by the following rules:

- By Member's purchase amount\$; or
- By specific purchase item(s); or
- For visiting specific Store(s);

Extra Bonus Points may be granted for Member at specific conditions such as:

- Purchase product at specific date and time frame
- Member's Birthday month;
- New member Extra

Furthermore, user has option to "assign" this customer earned Bonus Points onto different "Redemption Groups", which could make user has more option to provide different redemption offerings

Bonus Points Redemption:

Due to the control and Points Management concerns, the Bonus Points Redemption is required to process On-Line by the system as standard.

Important Restriction to be observed:

No Bonus Points Redemption allowed if the POS front end system cannot connect to Back Office on-line at redemption. This design is aimed to minimize the chance of double redemption in POS.

The eligible points will be read on-line from POS to Back End Server at redemption process for calculation.

The Redemption Reward is based on the "pre-define" rules set for different "Redemption Groups": such as:

- specific Gift is given for Redemption Group (I) customer; or
- Cash Coupon is offered for Redemption Group (II) customer and more

5.5.1 Bonus Point Calculation

5.5.1.1 Product Group Maintenance

This is the "Product Group" may be useful for Bonus Points Redemption Process. User could define different product(s), or set of Product Group(s), which will generate different number of Bonus Points based on different product groups.

The Product Group can be defined By Category, Sub-Category, Brand, Season or specific Items.

Product Group Table Maintenance (CR1008)

Cat.	Sub-Cat.	Brand	Season	Prod. Line	Anly. Label	Anly. Code	Item
1 00	AC	000005	AU				
2							
3							
4							
5							
6							
7							
8							
9							
10							

5.5.1.2 Gift Master Maintenance

This is the "Gift Master" for use in Bonus Points Redemption Process. User can define the Gift(s) or Gift Set in this table for Customer BP Redemption in Redemption Process.

The screenshot shows the 'Gift Master Maintenance' screen (CR0004). At the top, there are buttons for 'Save', 'Clear', 'Validate', and navigation arrows. On the right, there are links for 'Back' and 'SX1 Admin User'. The main area has fields for 'Gift Code' (G005) and 'Description' (1982 Red Wine 1 Bottle). Below this is a 'Gift Control' grid with columns: Item Code, Color, Size, and Quantity. The grid contains one row with data: Item Code 001 20000002, Color #1, Size .5C, and Quantity 1.

Item Code	Color	Size	Quantity
001 20000002	#1	.5C	1

5.5.1.3 General Bonus Point Calculation

In order to calculate the correct Bonus Points (BP) to be earned by Member when purchasing, user needs to define a correct BP calculation formula in the system.

Bonus Point Calculation Header Screen Page

Now Eff.	From Date	To Date	From Loc.	To Loc.	Ref. No.	Remarks
01/01/1901	01/01/2021	*****	*****	A01	General Products for all shops	
01/01/1901	01/07/2020	'A	'A04	AAAAA	Promotion for Selective Shops Only	
01/01/2001	01/01/2022	*****	*****	AAA	Female Products For Mother Day	
01/01/2018	31/12/2019	*****	*****	R1	Male Products For Father Day	
*	01/01/2020	31/12/2099		JB21001	Joyce Beauty BP Earning Policy 2021	
01/01/2021	01/01/2021	*****	*****	A	Elderly Health Care Voucher Scheme	

Display Records Options:-

- All (Past, Now & Future)
- Now
- Future

Display Records : All Now Future

- Please see sample screen next page

Bonus Point Calculation Detail Formula Screen Page

Screen Sample (I)

General Point Calculation Information (CR0006)

Reference No: JB21001

Remarks: Joyce Beauty BP Earning Policy 2021

Disc. Item Ctrl: 1 - None

Effective Period: From Date 01 / 01 / 2020 00 : 00 : 00 To Date 31 / 12 / 2099 00 : 00 : 00 Special Period*

Effective Location(s): All Location, Location Range, Loc. Select

To Members: All Member

Bonus Points Control

Redemption Group	Cat	Sub-Cat	Brand	Sea.	Item Code	Prod.Group	Amt\$ >=	Amt\$ <=	Point	Per Pur.\$	*
1 NEWJOINRG					100BACH0602HAW		1.00	100.00	10.0	10.00	
2 NEWJOINRG							101.00	200.00	12.0	10.00	
3 NEWJOINRG							201.00	9,999.00	14.0	10.00	
4 NEWJOINRG							1.00	999,999.00	1,000.0		
5											
6											
7											
8											
9											
10											
11											
12											
13											
14											
15											
16											
17											
18											
..											

This sample illustrate that 1,000 points will be given to customer if Purchase the specific Item of "100BACH0602HAW"

For Special Bonus Point calculation formulae in specific date & time setting please refer to screen sample next page

- This is the "Redemption Group" where the customer's earned bonus points will be stored;
- Different "Redemption Group" may result in different redemption offerings at Redemption

For Discounted Items:

- This is the percentage (i.e.70%) you want to be discounted for Bonus Point given to customer if the purchase items are sold under On-Sales discount price

- This example illustrate the Member will earn Ten (10) Points per Ten(10) dollar\$ purchase under \$1,000;
- Earn 12 Points per Ten(10) dollar\$ if purchase between \$1,001 – \$2,000;
- Earn 14 Points per Ten(10) dollar\$ if purchase between \$2,001 and over;
- This Example illustrate the customer could get more Bonus Points for higher purchase amount;

Bonus Point Calculation - The special Date & Time Points Calculation

Screen Sample (II)

The screenshot shows the 'Member Bonus Points Control - Special Period (CR0006)' window. The left sidebar contains fields for 'Reference No.' (JB21001), 'Remarks' (Joyce Beauty BP Earnings), 'Disc. Item Ctrl' (1 - None), and 'Effective Period' (From Date: 01 / 01 / 2020 00). The main area is a grid of rules:

Redemption Group	Category	Sub-Category	Brand	Sea.	Item Code	Product Group	Amt\$ >=	Amt\$ <=	Point	Per Pur.\$
1 NEWJOINRG							1.00	100.00		
2 NEWJOINRG								101.00	200.00	
3 NEWJOINRG							201.00	9,999.00	2.0	1.00
4 NEWJOINRG					100BACH0602HAW		1.00	999,999.00		

This sample illustrate the bonus point calculation is become 2 points for each dollar spent by Member under this special date or time as specified.

5.5.1.4 Extra Bonus Point Calculation

There are three(3) preset rules allow user to define "Extra" Bonus Points calculation:

- Member's Birthday Month Purchase
- New Join Member Extra Bonus Points
- Location Group Purchase

Extra Bonus Point Calculation Creation Screen Page

The screenshot shows the 'Extra Point Calculation Information' screen (CR0009). At the top, there are buttons for Save, Clear, Validate, and navigation arrows. On the right, it shows 'SX1 Admin User'. Below the title, there is a list of preset rules: '01 - Member Birthday Month Purchase', '02 - New Member Extra Points' (which is selected and highlighted with a red circle), and '03 - Location Group Purchase'. To the right of the list are fields for 'How Often' (set to '0 - Once Only') and 'Frequency' (set to '1'). Below the list are sections for 'Effective Period' (From Date and To Date fields), 'Effective Location(s)' (All Location selected), and 'To Members' (All Member selected).

The Input Detail:

Event Type: 01 - Member Birthday Month Purchase

Reference No.: 05BIRTH

Remarks: Extra Pts for Birthday Month

Effective Period: From Date 01 / 01 / 2022 00 : 00 : 00 To Date 31 / 12 / 2022 00 : 00 : 00

Frequency: 1

To Members: All Member

	Amt\$ >=	Amt\$ <=	Redemption Group	Extra Bonus Point	% of Extra Point Gain
1	1.00	1,000.00	20210504		30.00
2	1,001.00	999,999.00	20210504		50.00
3					
4					
5					

How Often

This is the indicator to set HOW OFTEN this Extra BP calculation to be occurred within the effective period:

- Once only,

Could be Maximum x10 times within a month.(a free setting by user)

This is the conditions of Extra Bonus Points to be earned in either:

- Exact Bonus Points;
- or in Extra % calculate on top of regular BP earning.

Note: All the Bonus Points earned from this Table are the Extra Point adds on top of regular calculation.

5.5.2 Bonus Point Redemption (Online)

As customer has earned his bonus points by purchase, user need also to define how these earned bonus points to be consumed by customer. This process is used for defining Bonus Point Redemption Calculation.

Header Page Screen

Now Eff.	From Date	To Date	Ref. No.	Redemption Group	Remarks
	01/02/2001	01/02/2001	Z1	100CASH	\$100 Cash Redemption
*	01/01/2021	31/12/2022	GP101	GP101	BR Redemption Plan for 2021-2022

Display Records Options:-

- All (Past, Now & Future)
- Now
- Future

Display Records: All Now Future

The Bonus Point Redemption Detail Page

The Redemption Group – indicating this set of redemption formula is valid only under this redemption group.

Point Redemption Calculation Information (CR0008)

Reference No. GP101

Redm. Group GP101

From Date - To Date 01 / 01 / 2021 - 31 / 12 / 2022

To Members

All Member (radio button selected)

Remarks BR Redemption Plan for 2021-2022

Point Redemption Control

Point	Gift Code	Qty.	Amount	Per Point
1	5,000.0		100.00	3,000.0
2	10,000.0		110.00	3,000.0
3	15,000.0		120.00	3,000.0
4	20,000.0		130.00	3,000.0
5				
6				
7				

This sample illustrates the redemption calculation as follows:

At Redemption Process, if Customer:

- accumulate more than 5,000 points will entitle \$100 cash coupon per each 3,000 points
- accumulate more than 10,000 points will entitle \$110 cash coupon per each 3,000 points
- accumulate more than 15,000 points will entitle \$120 cash coupon per each 3,000 points
- accumulate more than 20,000 points will entitle \$130 cash coupon per each 3,000 points

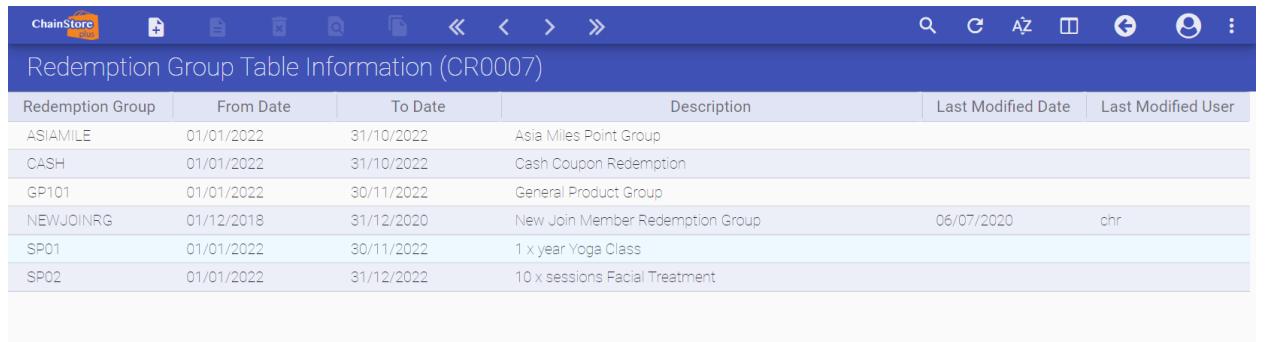
This sample is illustrating how user could set the calculation rules to encourage member to accumulate more Bonus Points for higher redemption reward.

5.5.2.1 Member Redemption Group Maintenance

This is the Table to determine the how customer's earned Bonus Points to be stored in which Redemption Group.

User firstly needs to define various Redemption Group when needed. In general, usual ONE redemption would be sufficient for most of operation.

Please consult Sanyo Extended Business Consultant before use.



Redemption Group	From Date	To Date	Description	Last Modified Date	Last Modified User
ASIAMILE	01/01/2022	31/10/2022	Asia Miles Point Group		
CASH	01/01/2022	31/10/2022	Cash Coupon Redemption		
GP101	01/01/2022	30/11/2022	General Product Group		
NEWJOINRG	01/12/2018	31/12/2020	New Join Member Redemption Group	06/07/2020	chr
SP01	01/01/2022	30/11/2022	1 x year Yoga Class		
SP02	01/01/2022	31/12/2022	10 x sessions Facial Treatment		

Redemption Group Table Input Page:

Redemption Group Table Maintenance (CR0007)

Redemption Group: SP02

Description: 10 x sessions Facial Treatment

From Date - To Date: 01 / 01 / 2022 - 31 / 12 / 2022

Expiry Date Control

	From Date	To Date	Expiry Date	Description
1	01/01/2022	31/05/2022	31/12/2022	
	01/06/2022	31/12/2022	31/05/2023	
3				
4				
5				
6				
7				
8				
9				

This means the Bonus Points has
Expiry Date Control if checked

This example illustrates the following meaning:

- All the Bonus Points inside the Redemption Group "CASH" earned between 01/01/2022 – 31/05/2022 will be expired by 31/12/2022;
- the Bonus Points earned between 01/06/2022 – 31/12/2022 will be expired by 31/05/2023;

5.5.2.2 Points Redemption Gift Maintenance

This Table is use to define the Redemption Points for Gift(s).

Points Redemption Gift (CR2001)

Points Redemption Gift Information

Ref. No.	BP001		
Redm. Group	GP101	General Product Group	
From Date	01/01/2005	To Date	01/12/2010
Remarks	Product Redemption for 2005		
Created By 08/02/2005 sxd Last Modified 14/06/2006 sxd			

Points Redemption Control

Seq.	Point	Vs. Gift Set	
		Gift Code	Qty.
001	3000.0	TB0001	1
002	8000.0	GTX002	1
003	8000.0	G0001	1
004			
005			
006			
007			

Verify Insert Delete

In the above sample shown :

- customer redeem the gift "TB0001" requires 3,000 points
- customer redeem the gift "GTX002" requires 8,000 points
- customer redeem the gift "G001" requires 8,000 points

Note: All the Redemption MUST be done in POS front end in On-Line Mode

- END OF BOOK (2) : MASTER FILES -