

V-REGI series

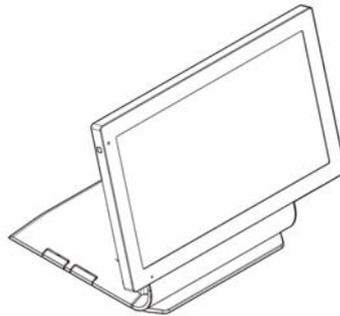
Store support system

Standard package

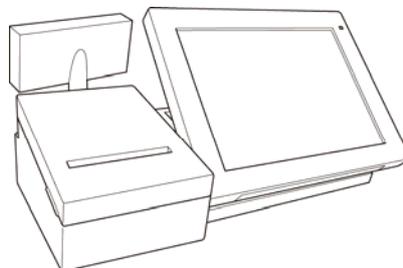
Sales management

Customer File Reference Manual

V-R7000



V-R100



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Introduction

This manual explains functions and operation of Customer File.

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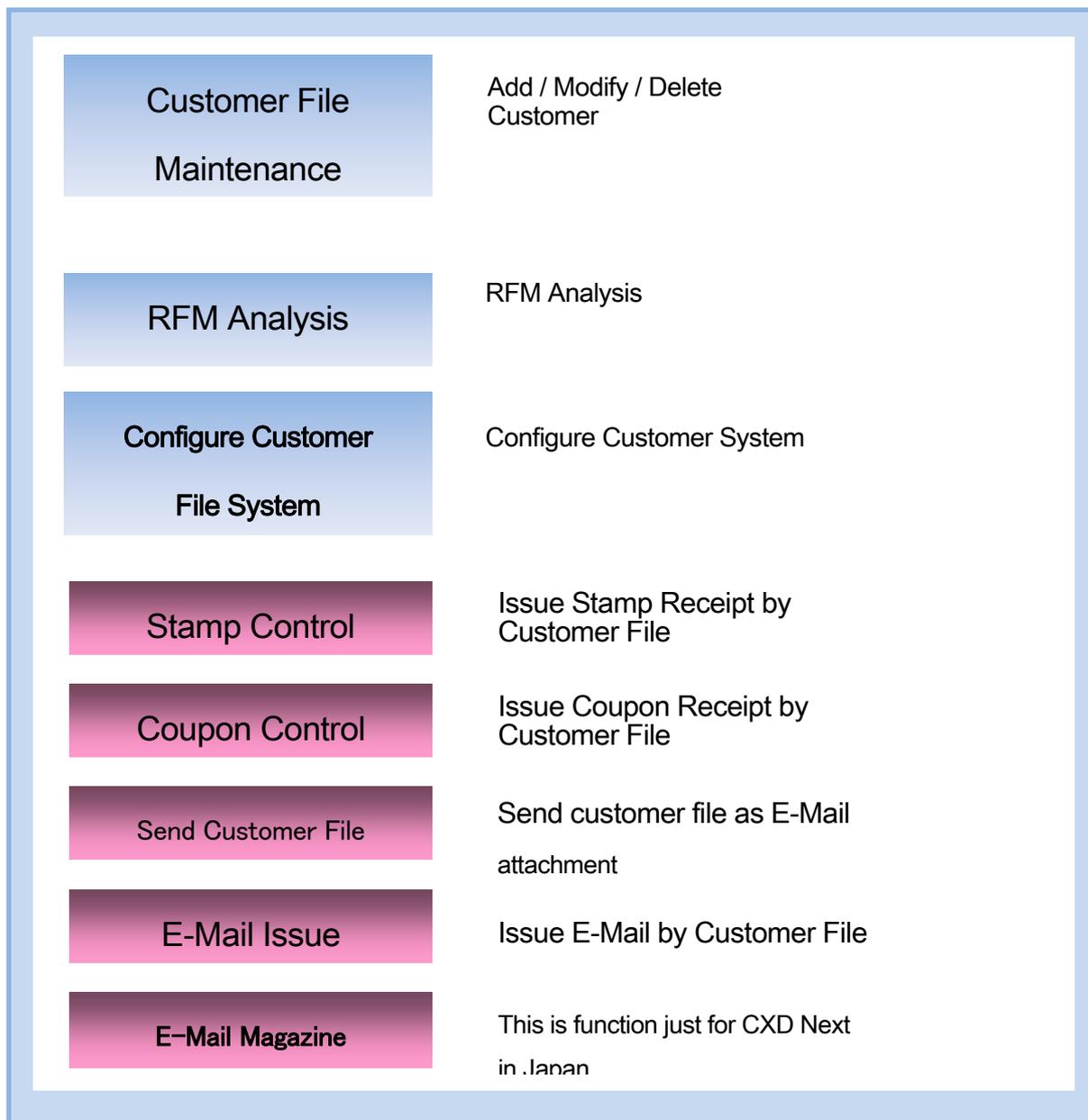
SECTION 1

Introduction of the Customer File

1. Introduction of the Customer File

1.1. Outline of the system

V-REGI Customer File offer management of Customer Information at the store.



1.2. Jobs and functions list

- **Customer Note** --- Operations to control Customer Information

New : Register new Customer Information

Edit : Edit Customer Information

Delete : Delete Customer Information

Print : Print Customer Information

Function: Print Customer Information, Print Customer Bar Code,

The privilege to a customer is set up. (Giving a discount)

Send Customer File as E-Mail attachment, Send E-Mail to Customer.

Search : Search with Customer Information to find out Customer, sort and print them

- **Customer Analysis** --- Operations to analyze what customer has purchased in the past

Analysis : Customer Analysis with RFM, show list.

Rank : Setup range values for RFM Analysis

Print : Print result of RFM Analysis

Function: Print result of RFM Analysis, Print Customer Bar Code,

The privilege to a customer is set up. (Giving a discount)

Send Customer File to Administrator as E-Mail attachment, Send E-Mail to Customer.

Search : Search with Customer Information to find out Customer, sort and print them

- **Settings for Customer File** --- Customize "Customer Note" and "Customer Analysis" operation.

Item : program name of each parameters and control for Customer File

List : When "Input Method" is List (Candidate), Setup item of list

RFM : Setup range values for RFM Analysis

Function: Setting for Stamp, Coupon, and Administrator E-Mail Address to send Customer File.

Protection: Set Administrator password, Set User password and limitation.

Set: Initialize reservation data

1.3. What's RFM Analysis

RFM

From Wikipedia, the free encyclopedia

RFM is a method used for analyzing customer behavior and defining market segments. It is commonly used in database marketing and direct marketing and has received particular attention in retail.

RFM stands for

Recency - *How recently did the customer purchase?*

Frequency - *How often do they purchase?*

Monetary Value - *How much do they spend?*

To create an RFM analysis, one creates categories for each attribute. For instance, the Recency attribute might be broken into three categories: customers with purchases within the last 90 days; between 91 and 365 days; and longer than 365 days. Such categories may be arrived at by applying business rules, or using a data mining technique, such as CHAID, to find meaningful breaks.

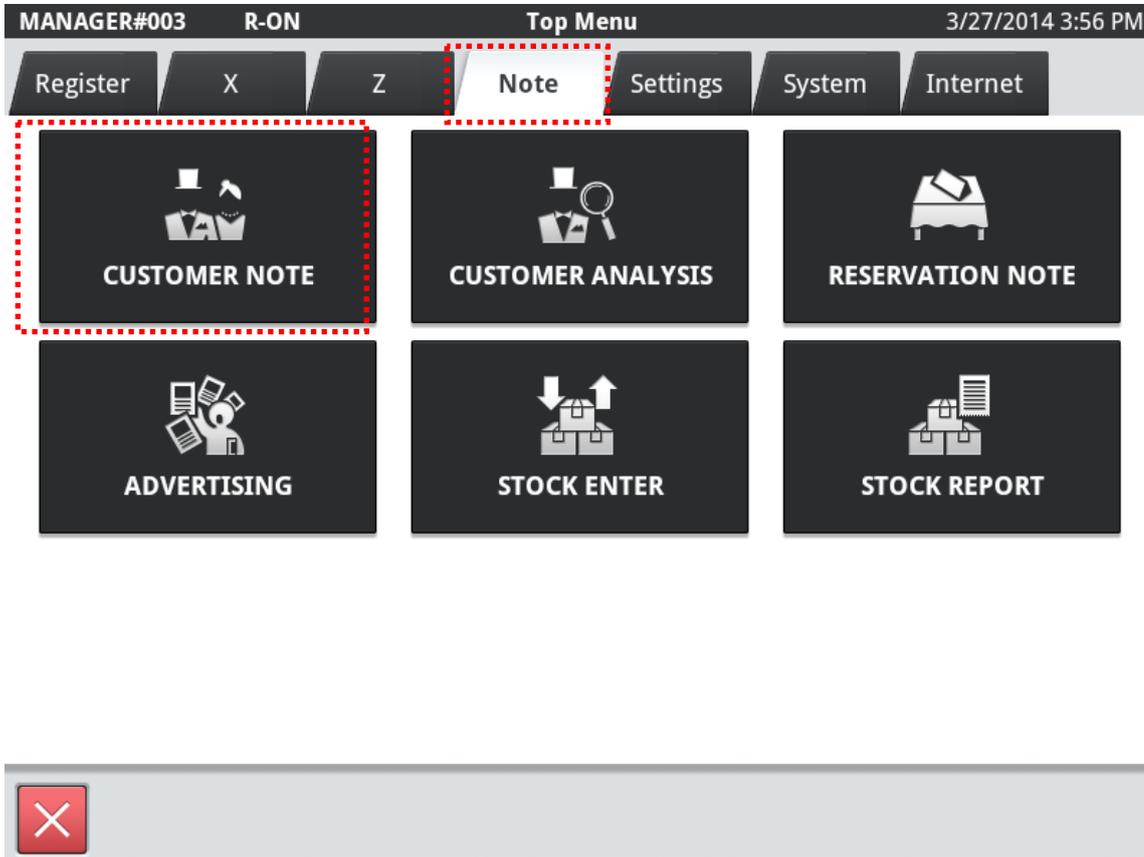
Once each of the attributes has appropriate categories defined, segments are created from the intersection of the values. If there were three categories for each attribute, then the resulting matrix would have twenty-seven possible combinations (one well-known commercial approach uses five bins per attributes, which yields 125 segments). Companies may also decide to collapse certain subsegments, if the gradations appear too small to be useful. The resulting segments can be ordered from most valuable (highest recency, frequency, and value) to least valuable (lowest recency, frequency, and value). Identifying the most valuable RFM segments can capitalize on chance relationships in the data used for this analysis. For this reason, it is highly recommended that another set of data be used to validate the results of the RFM segmentation process.

SECTION 2

Operation of the Customer File

2. Operation of the V-REGI Customer File

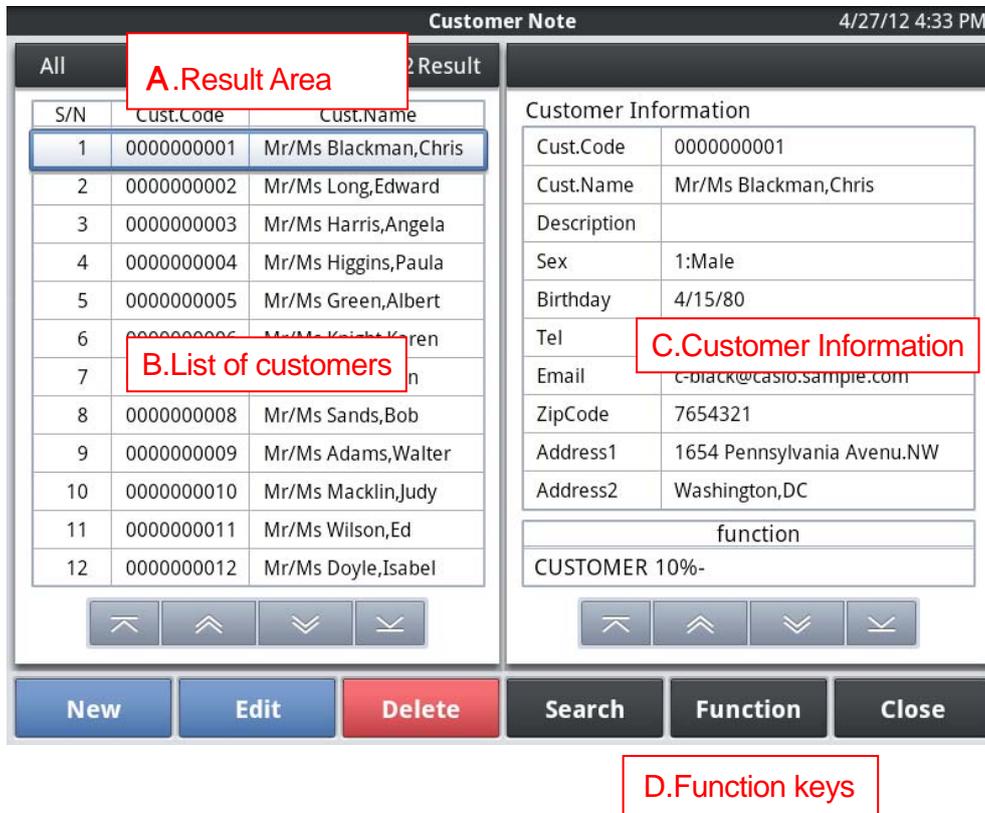
2.1. Customer Note



Customer note can be entered from Top Menu – Note tab.

2.1.1. Main screen

Here is the main screen of the Customer File



A . Result Area

- The number of result of search, and list will be indicated.
- Tap « or » to move back / forward list.
- Tap this field to get dialog to search customer.

B . List of Customer

- Browse list of Customer
- Display detailed Customer Information where you have tapped List Are at B.

C . Details of Customer Information

- Display detailed Customer Information where you have tapped List Are at B.
- Tap» to show customer stamp and charge sales information.

D . Function keys

- Available function keys are displayed in this field.

2.1.2. Register New Customer

Register new Customer

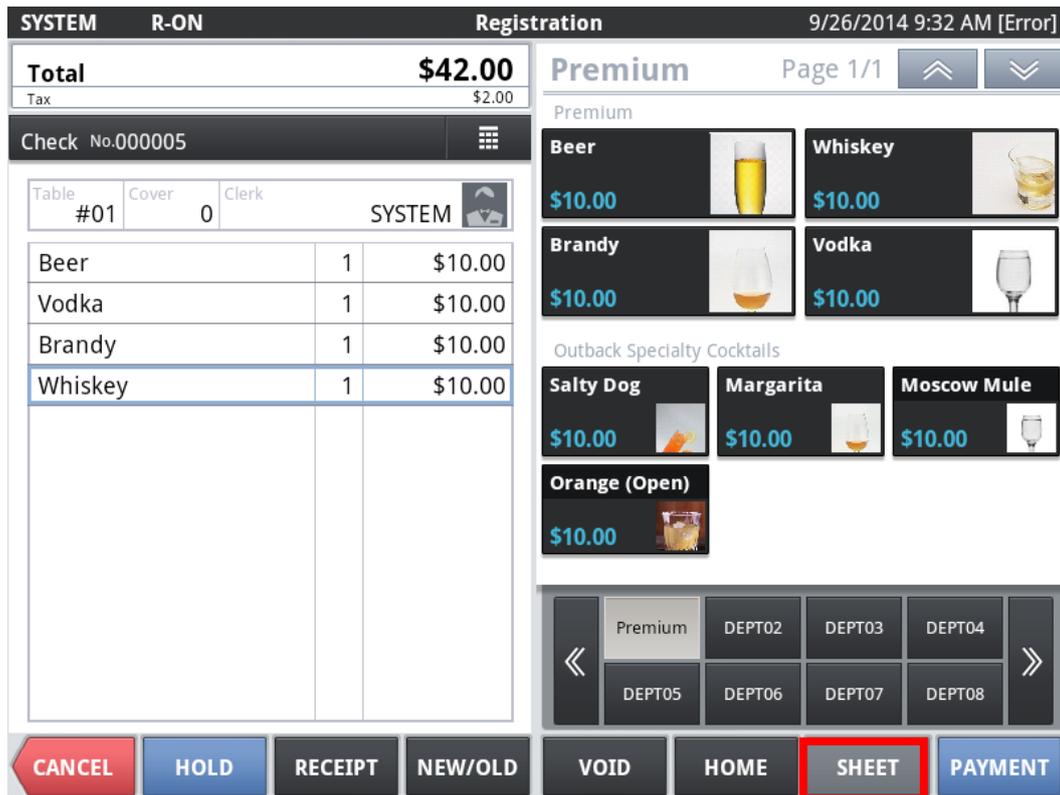
The screenshot shows a mobile application interface titled "Customer Note" with a timestamp of "4/27/12 4:39 PM". The interface is split into two main sections. On the left, there is a list of 13 results under the heading "All". The list has three columns: "S/N", "Cust.Code", and "Cust.Name". The entries range from S/N 1 to 12, with the last entry being S/N 12, Cust.Code 0000000012, and Cust.Name "Mr/Ms Doyle, Isabel". Below the list are four navigation arrows: left, up, down, and right. On the right, there is a "Detailed display region" for a selected customer. This region is outlined with a red dashed border and contains a form with the following fields: "Cust.Code" (value: 0000000014), "Cust.Name", "Description", "Sex", "Birthday", "Tel", "Email", "ZipCode", "Address1", and "Address2". Below these fields is a "function" button. At the bottom of the screen, there are two buttons: "Cancel" (red) and "Save" (blue).

S/N	Cust.Code	Cust.Name
1	0000000001	Mr/Ms Blackman,Chris
2	0000000002	Mr/Ms Long,Edward
3	0000000003	Mr/Ms Harris,Angela
4	0000000004	Mr/Ms Higgins,Paula
5	0000000005	Mr/Ms Green,Albert
6	0000000006	Mr/Ms Knight,Karen
7	0000000007	Mr/Ms Liloyd,Alan
8	0000000008	Mr/Ms Sands,Bob
9	0000000009	Mr/Ms Adams,Walter
10	0000000010	Mr/Ms Macklin,Judy
11	0000000011	Mr/Ms Wilson,Ed
12	0000000012	Mr/Ms Doyle,Isabel

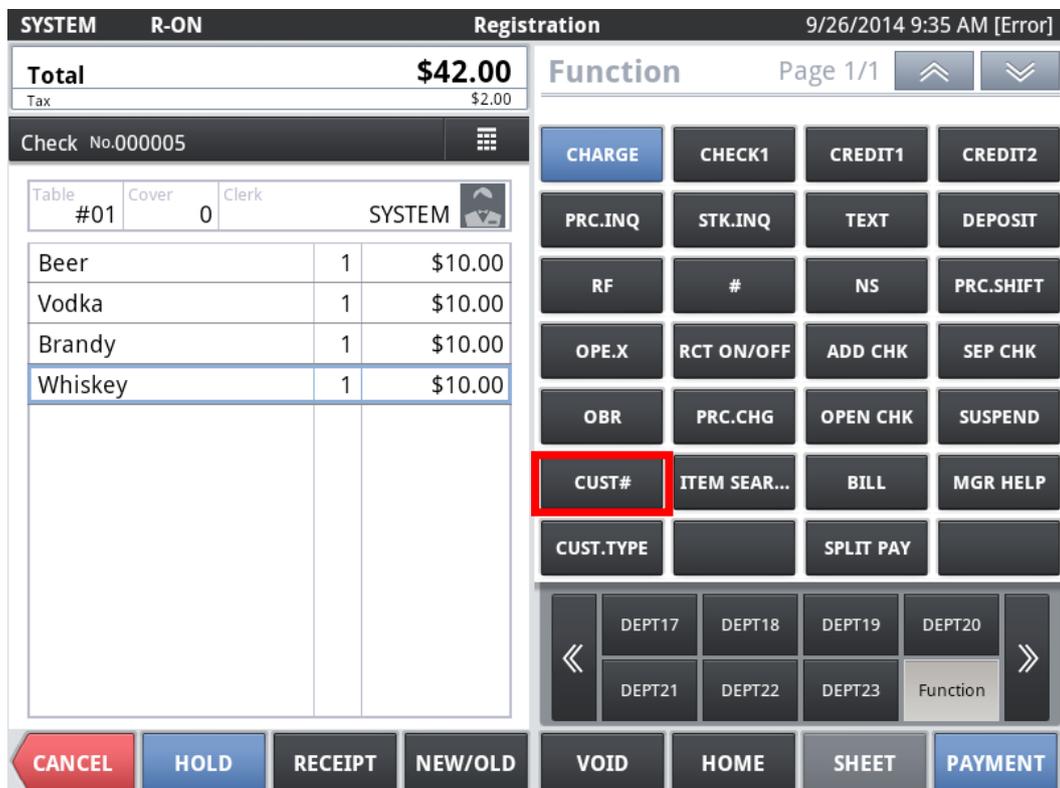
Cust.Code	0000000014
Cust.Name	
Description	
Sex	
Birthday	
Tel	
Email	
ZipCode	
Address1	
Address2	
function	

- When the tap of <New> is carried out, a detailed display region will be in the input state of New Customer Information.
- A customer code is assigned automatically.
- After inputting required information, if the tap of <Save> is carried out, Customer Information will be registered.
- When you stop an input, please carry out the tap of <Cancel>

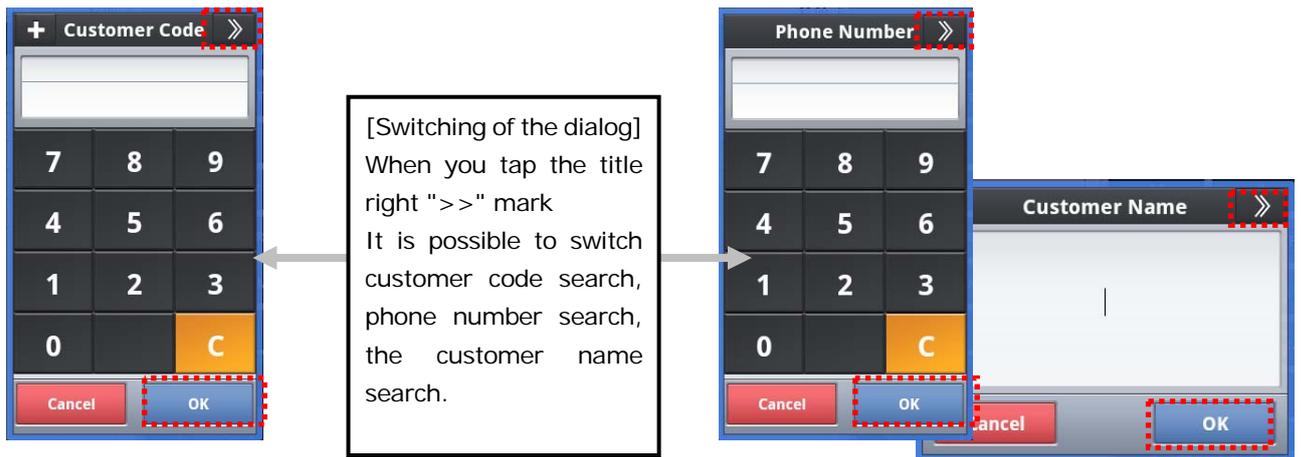
2.1.3. Register New Customer at Registration



During operation of the register, if you want to search or register a customer, Please tap the <SHEET> the lower right corner of the screen.



- Tap <CUST#>



- When you tap the <OK> without entering the customer code, you will be able to search for the customer from the customer list.
- After confirmation, please refer to the following [1] and [2], the operation description.

[1] If the customer is already registered

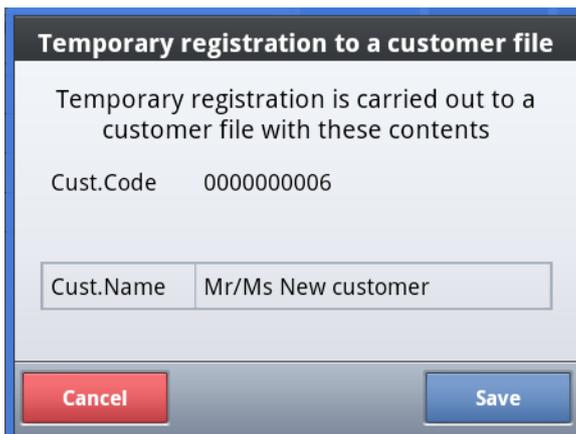


- Customer name that corresponds to the customer code that you entered will be displayed.
- Make sure the customer name that appears. When you tap the bottom right of this dialog the <OK>, customers listed will be selected.

[2] Customer is not registered, if you want to register as a new customer



- Dialog is displayed if the customer has not been registered.
- If you want to register as a new customer, and then tap <OK> dialog lower right.
- Please tap the <Cancel> If you want to cancel the registration.



- Registration confirmation screen of the customer is displayed, register the customer's name.
- When you tap the frame that are listed as "New Customer", customer name input screen is displayed.

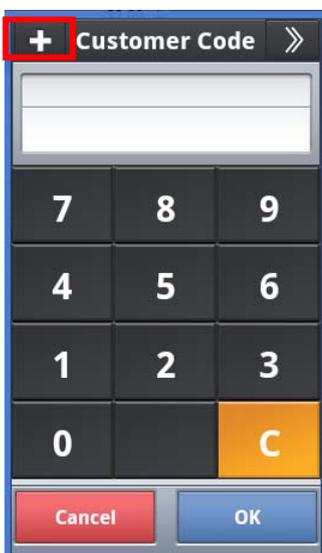


- Enter Customer Name, and tap <OK>.



- Make sure what you have entered, tap the <OK> dialog bottom right, it will be registered.
- Customer information after registration you can be changed in the [Customer Note].

[3] If you want to register a new customer easily from the beginning



- I will tap in the upper left corner of the customer code input dialog [+].
- Customer code is issued automatically, go to the registration confirmation screen.
- A subsequent operation is the same as the registration of new customers.

[4] If you want to select from the entire customer list

Select from a list of customer book.

- In a state of displaying customer code input dialog, I will tap the <OK> without entering the customer code.
- Customer list is displayed. Tap the list display area on the left side, customer information of the target appears on the right side, and then tap <OK>.
- Tap the <Cancel> If you want to stop the operation.

The screenshot shows a mobile application interface titled "Customer Note" with a timestamp of "9/26/2014 9:54 AM [Error]". The interface is divided into two main sections: a list of customers on the left and a detailed view of the selected customer on the right.

Customer List (Left Panel):

S/N	Cust.Code▲	Cust.Name
1	000000001	Mr/Ms Customer #1
2	000000002	Mr/Ms Customer #2
3	000000003	Mr/Ms Customer #3
4	000000004	Mr/Ms Customer #4
5	000000005	Mr/Ms Customer #5
6	000000006	Mr/Ms New customer

The list is titled "All" and shows "6 Result". Navigation arrows are visible below the list.

Customer Information (Right Panel):

Customer Information	
Cust.Code	000000001
Cust.Name	Mr/Ms Customer #1
Description	
Sex	1:Male
Birthday	12/30/2011
Tel#	0312345678
Email	
ZipCode	
Address1	
Address2	
function	
TTL%-	

Navigation arrows and a right-pointing arrow are visible below the information panel.

Bottom Bar:

- A red "Cancel" button on the left.
- A black "Search" button in the center.
- A blue "select" button on the right.

2.1.4. Edit Customer Information

Edit registered Customer Information

The screenshot shows the 'Customer Note' application interface. At the top, the title bar reads 'Customer Note' and the time is '4/27/12 4:42 PM'. The main area is divided into two sections. On the left, a table lists 13 results. The second row is selected, showing S/N 2, Cust.Code 0000000002, and Cust.Name Mr/Ms Long,Edward. On the right, the 'Customer Information' form is displayed, showing fields for Cust.Code (0000000002), Cust.Name (Mr/Ms Long,Edward), Description, Sex (1:Male), Birthday (7/15/65), Tel (01234567890), Email (e-long@casio.sample.com), ZipCode (1234567), Address1 (1600 Pennsylvania Avenue,NW), and Address2 (Washington,DC). Below the list and form are navigation arrows. At the bottom, there are buttons for 'New', 'Edit', 'Delete', 'Search', 'Function', and 'Close'.

S/N	Cust.Code	Cust.Name
1	0000000001	Mr/Ms Blackman,Chris
2	0000000002	Mr/Ms Long,Edward
3	0000000003	Mr/Ms Harris,Angela
4	0000000004	Mr/Ms Higgins,Paula
5	0000000005	Mr/Ms Green,Albert
6	0000000006	Mr/Ms Knight,Karen
7	0000000007	Mr/Ms Liyd,Alan
8	0000000008	Mr/Ms Sands,Bob
9	0000000009	Mr/Ms Adams,Walter
10	0000000010	Mr/Ms Macklin,Judy
11	0000000011	Mr/Ms Wilson,Ed
12	0000000012	Mr/Ms Doyle,Isabel

Customer Information	
Cust.Code	0000000002
Cust.Name	Mr/Ms Long,Edward
Description	
Sex	1:Male
Birthday	7/15/65
Tel	01234567890
Email	e-long@casio.sample.com
ZipCode	1234567
Address1	1600 Pennsylvania Avenue,NW
Address2	Washington,DC
function	
CUSTOMER 10%-	

- Tap the List area in the main menu to display detailed Customer Information for editing
- Enter required information and tap <Save> this will store your new settings.
- To cancel entry, tap <Cancel> button

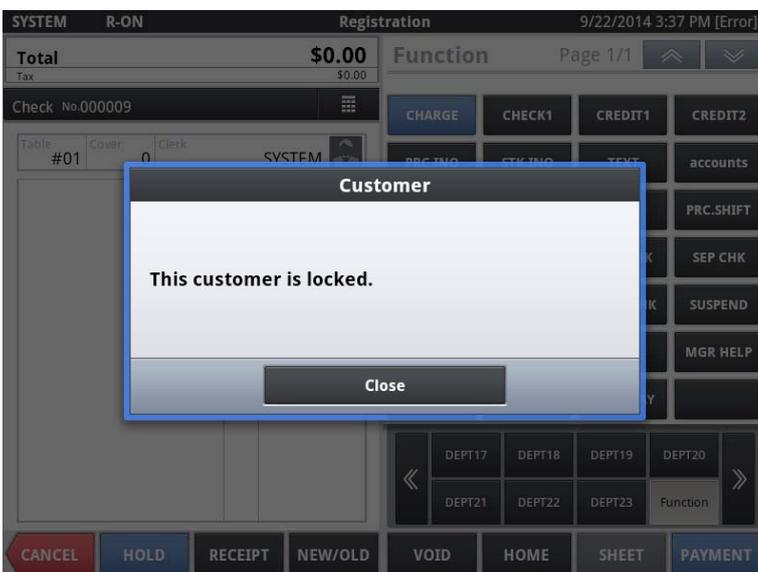
2.1.5. Lock Customer Information

Lock Customer Information

- Tap the List area on the main screen and then tap <Edit> button while the details are displayed.
- Scroll down the customer information area.
- Change set value of Out of Service.

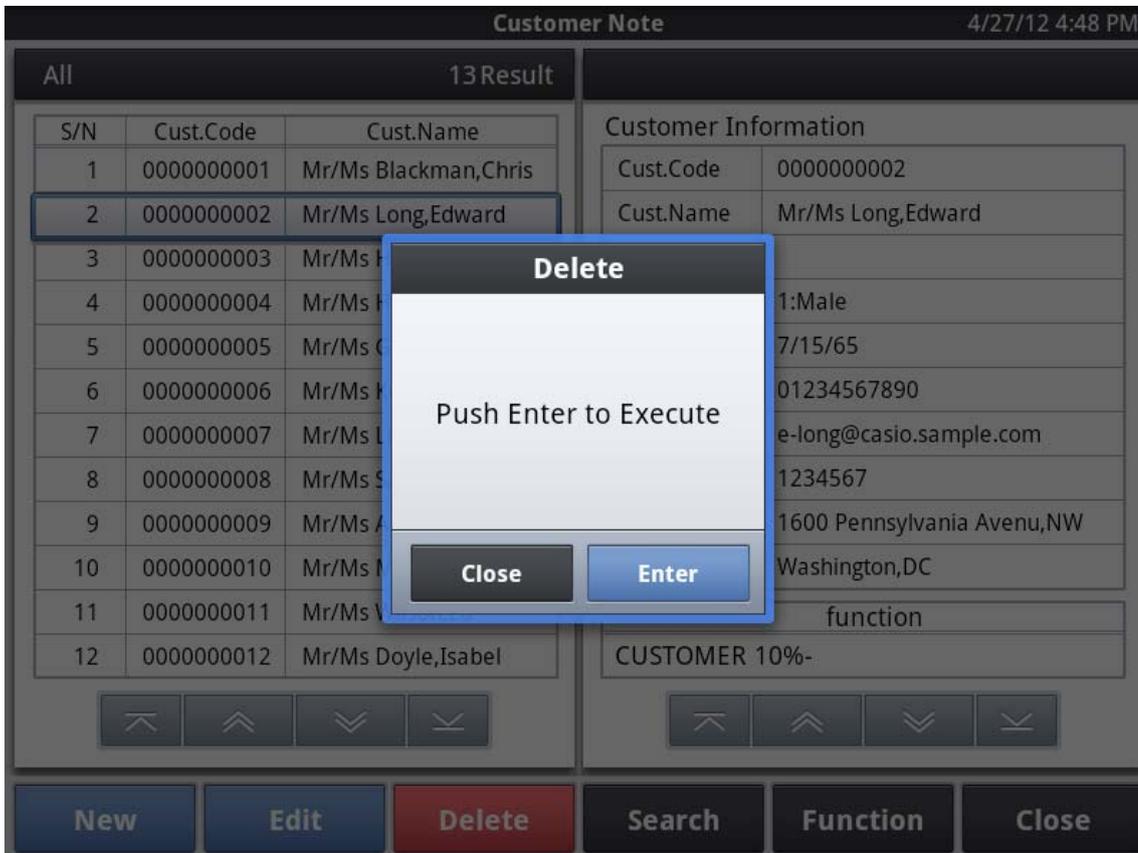
0: Valid	Unlock the customer
1: Invalid	Lock the customer

- When confirmation dialog is displayed, tap <Enter> to delete customer
- To cancel delete sequence, tap <Close> button
- This locked customer information can not be used in Registration.



2.1.6. Delete Customer Information

Delete Customer Information

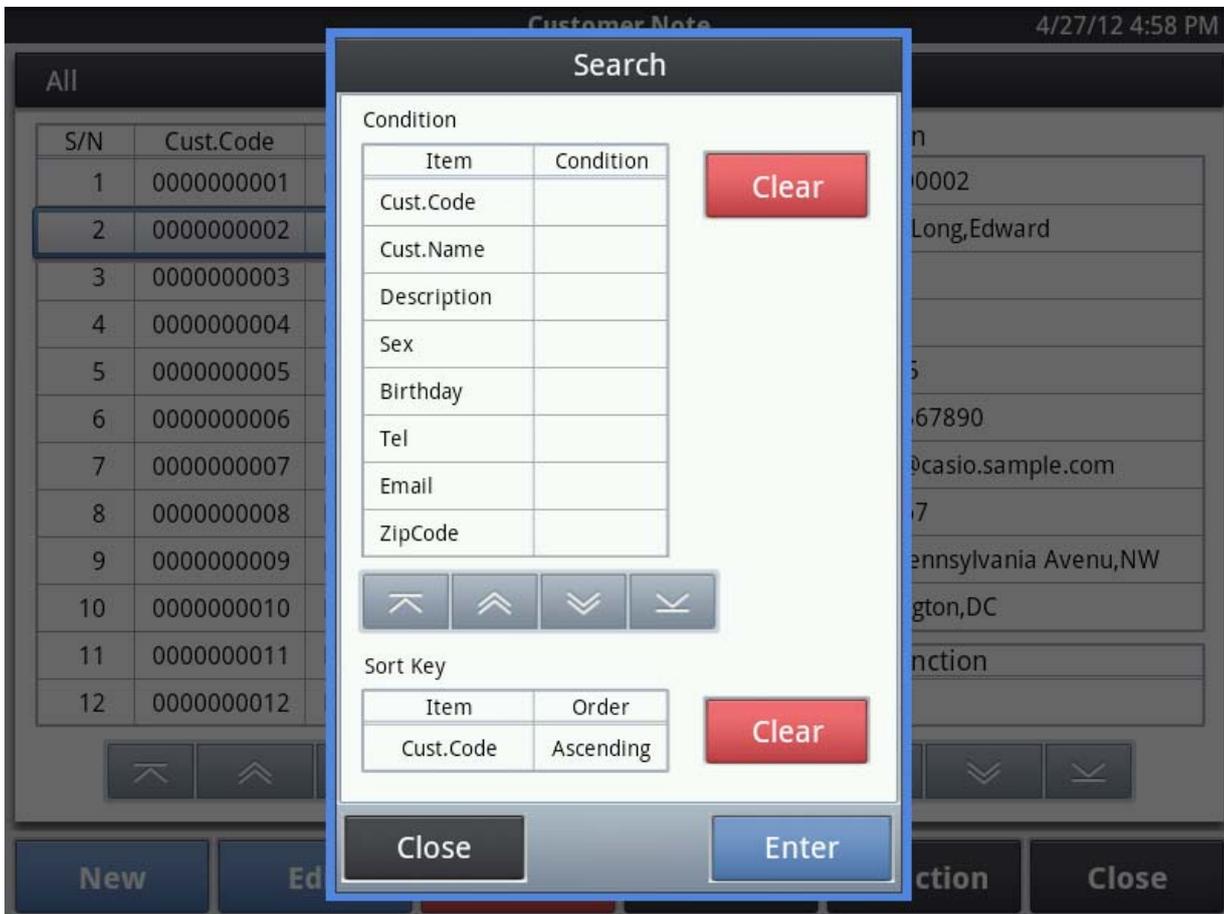


- Tap the List area on the main screen and then tap <Delete> button while the details are displayed.
- When confirmation dialog is displayed, tap <Enter> to delete customer
- To cancel delete sequence, tap <Close> button

2.1.7. Search Customer

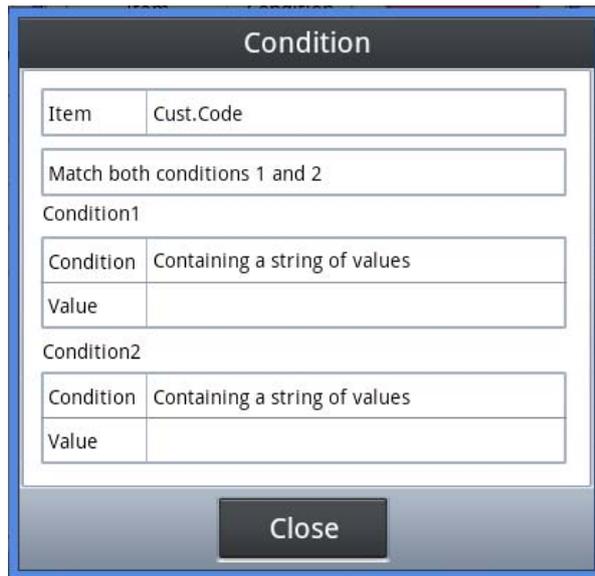
2.1.7.1. Search by condition

You can find Customer by using search function with specific key.



- A search dialog will be displayed if the tap of the search region is carried out.
- A search condition can be inputted by carrying out the tap of the search condition item.

Example of a search condition input

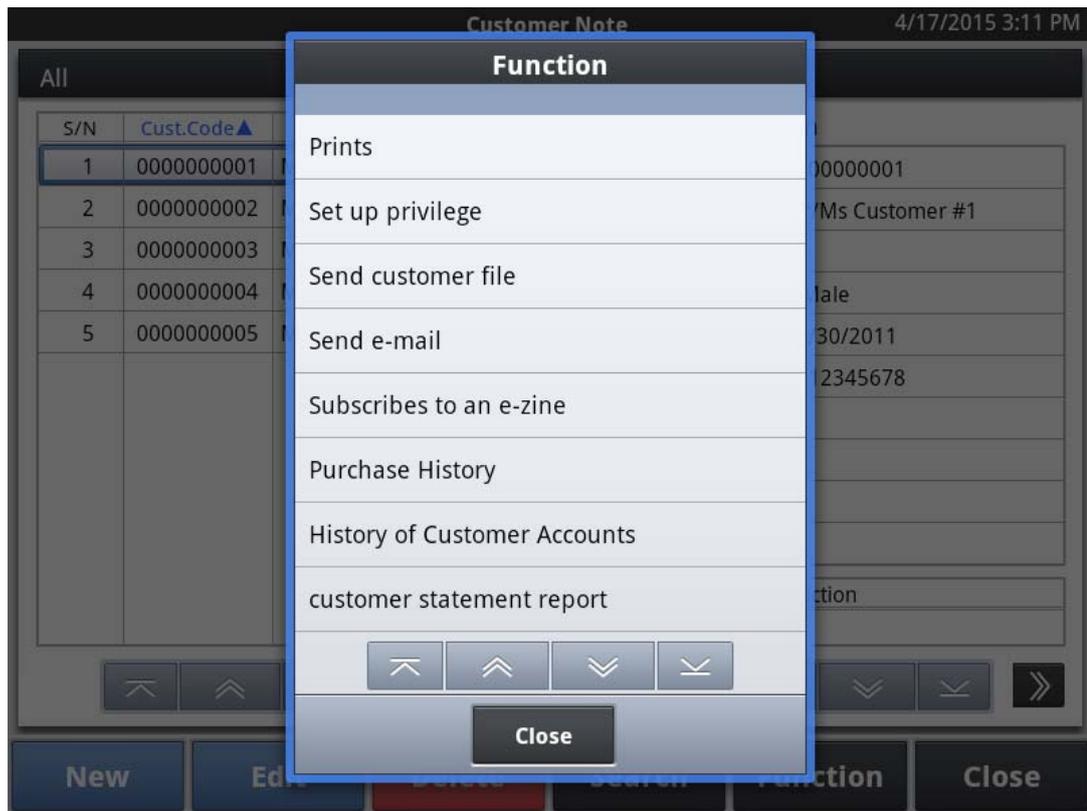


The image shows a dialog box titled "Condition" with a blue border. It contains the following elements:

- A table with two columns: "Item" and "Cust.Code".
- A text input field containing "Match both conditions 1 and 2".
- A section labeled "Condition1" containing a table with two rows: "Condition" (Containing a string of values) and "Value".
- A section labeled "Condition2" containing a table with two rows: "Condition" (Containing a string of values) and "Value".
- A "Close" button at the bottom.

- The sorting method can be specified by carrying out the tap of the sorting item.
- After inputting a search condition and sorting conditions, if the tap of <Enter> button is carried out, it will search, and display a result on a list display region.
- When you have stopped searching, please carry out the tap of <close>.

2.1.8. Functions

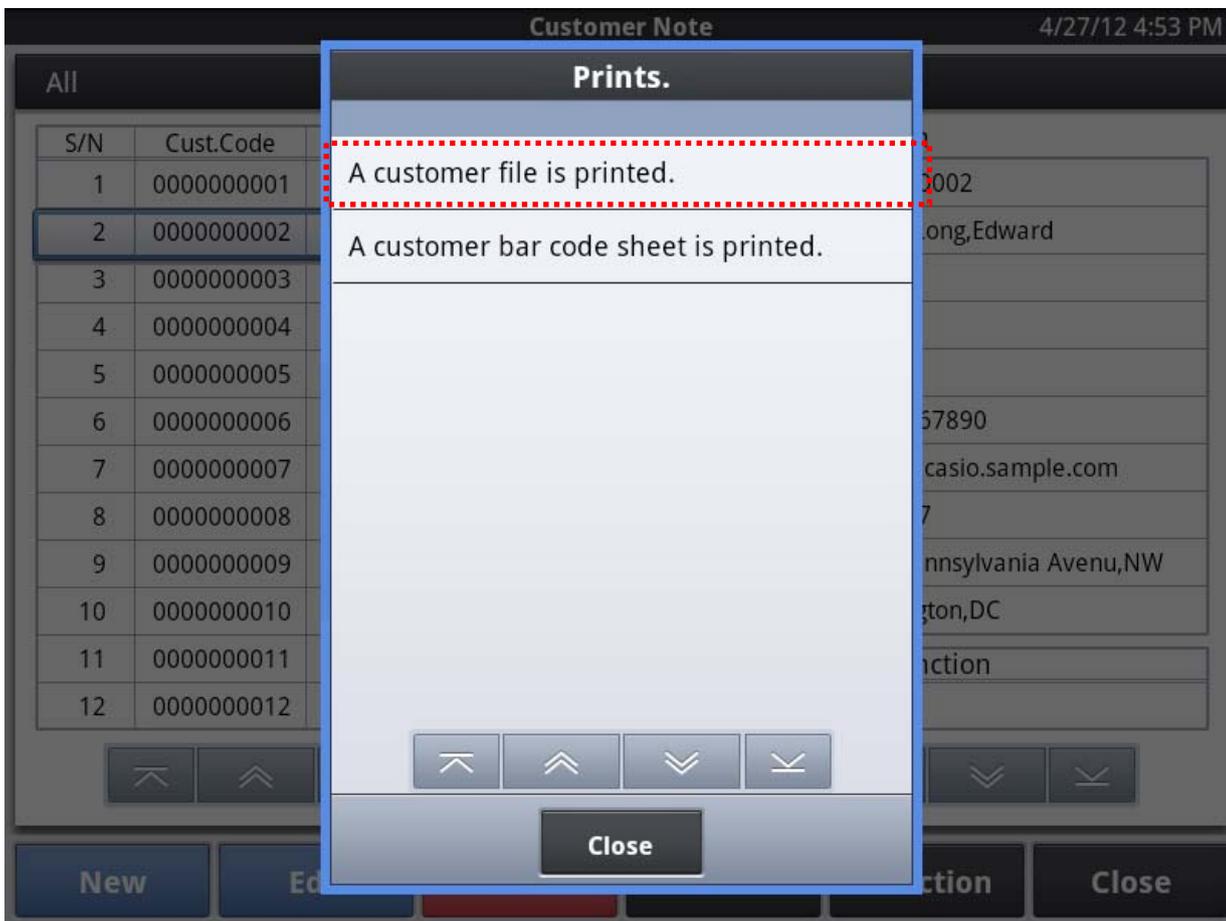


Functions:

- Print Customer Information, Print Customer Bar Code,
- The privilege to a customer is set up. (Giving a discount)
- Send Customer File as E-Mail attachment.
- Send E-Mail to Customer as DM.
- E-Mail Magazine Subscription for CXD NEXT.
- Purchase history
- History of customer accounts
- Print customer statement report

2.1.8.1. Print Out Customer Information

It is possible to print out registered Customer Information.



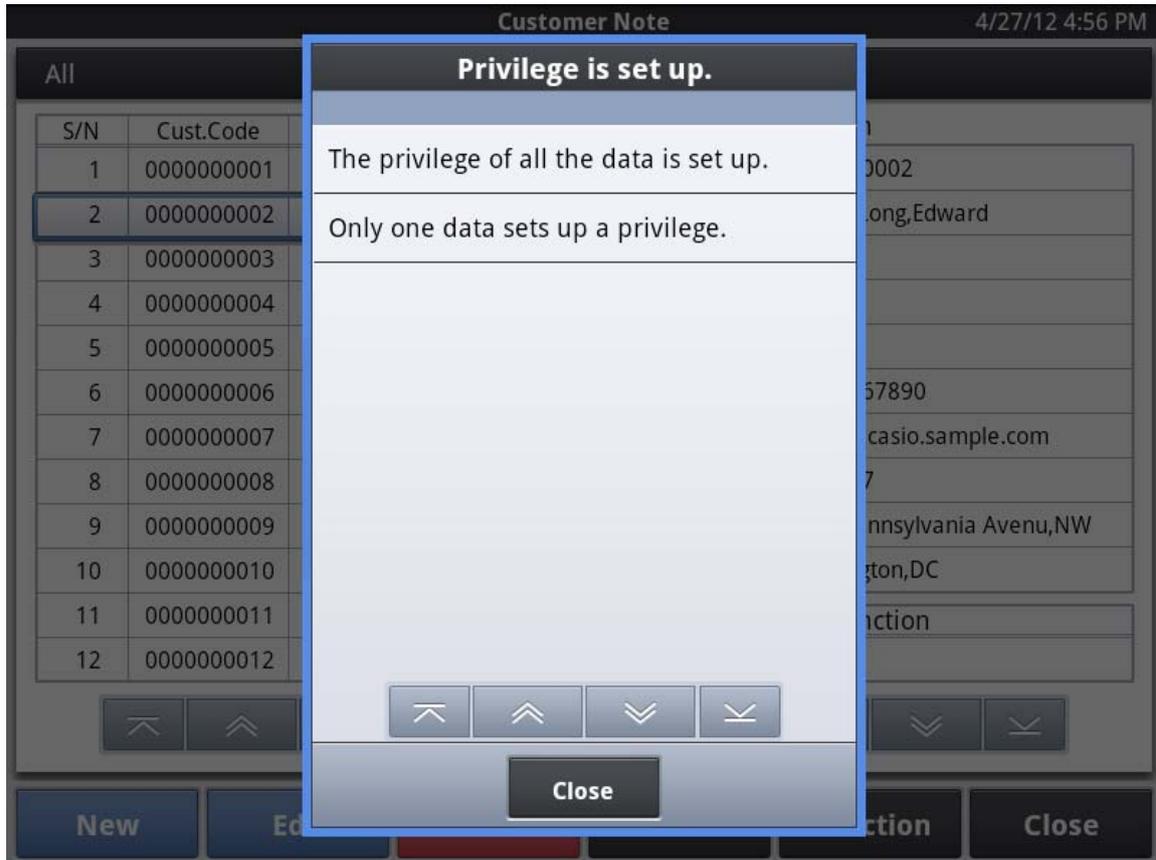
- Tap <Print> button at the main menu for print out
- Batch or individual Customer Information can be selected

2.1.8.2. Print out Customer Scanning Code

- In [Customer Bar Code Sheet is printed], VX prints Customer Bar Code (Scanning Code. Not Customer Code) on EAN 12 + 1 (Check Digit)

2.1.8.3. Setting for Customer Privilege

The privilege to a customer is set up. (Giving a discount)



- A setup of a privilege can be performed when the tap of the <Func> button at the base of the screen is carried out.
- Selection of [Batch data input] and [Individual setting] can be performed.
- In the case of [Batch data input] setting, a privilege can be set to all customers displayed in the list.
- In the case of [Individual setting] setting, a privilege can be set to the customer specified in the list displayed.
- The list of discount in the cash register will be displayed when a package setup or separate setting is chosen, please carry out a tap and choose.
- Specifying a customer in the displayed list, when deleting a privilege (Func) -- after that tap -- <modify> -- button and please carry out the tap of the privilege of a

detailed display region continuously.

2.1.8.4. Send Customer File

Send Customer File to Administrator as E-Mail attachment.
Select contents to send.

Customer File is sent. 4/9/12 5:27 PM

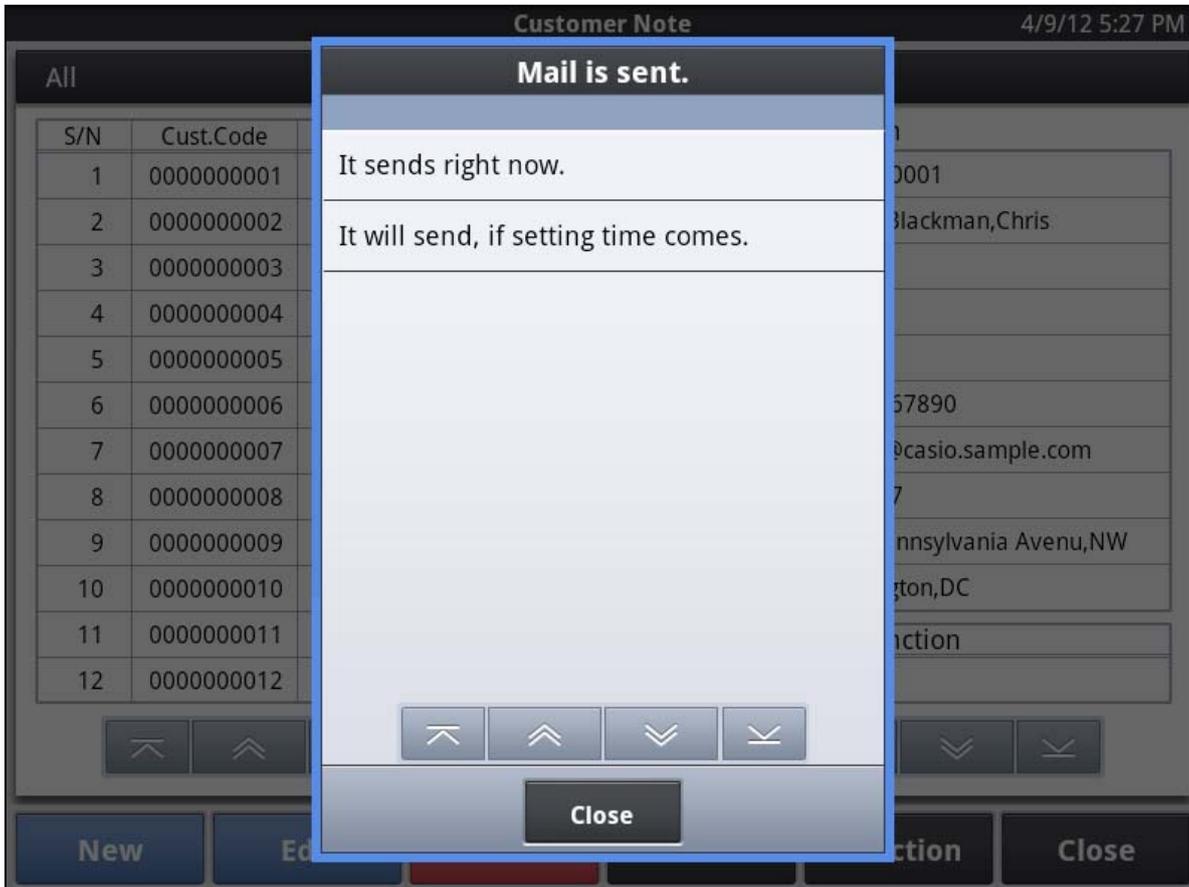
The item of the customer data sent by e-mail is chosen.

Item list.		The item sent by e-mail.
	Selection. >>	Cust.Code
	All are chosen.	Sex
	<<Release.	Cust.Name
	All are canceled.	Description
	Up	Birthday
	Down	Tel
		Email
		ZipCode
		Address1
		Address2
		Address3
		Address4

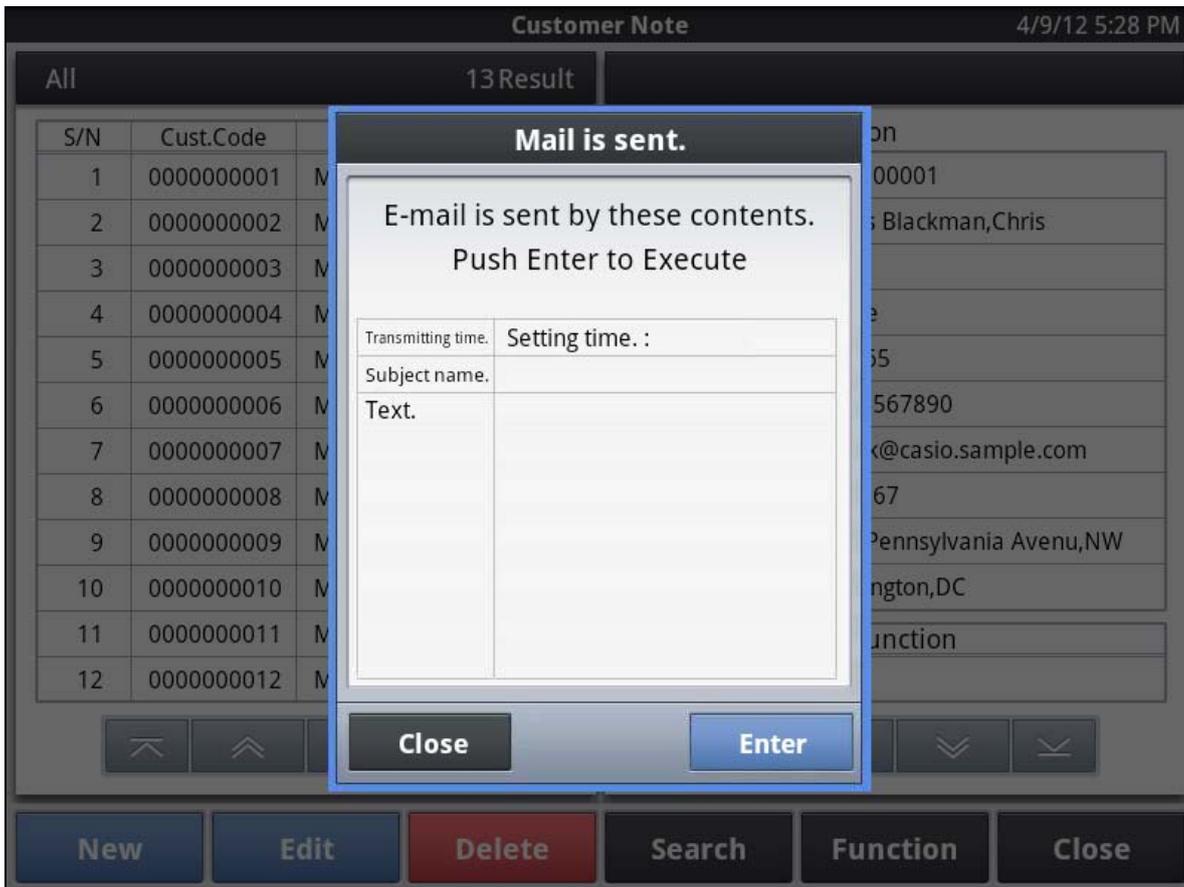
Cancel **Enter**

2.1.8.5. Send E-Mail to Customer

Send E-Mail to Customer.
There are two ways to send.
Immediately
By Timer (ex.AM10:00)



Once "Immediately" or "By Timer" is selected, the Time and contents will be displayed.



<Enter> : Go
<Close>: Cancel

2.1.8.6. E-Mail Magazine Subscription

E-Mail Magazine Subscription for CXD NEXT.
Available only in Japan.

The screenshot shows a software interface titled "Customer Note" with a timestamp of "4/9/12 5:29 PM". It features a table of 13 customer records and a "Customer Information" panel. A modal dialog is overlaid on the table, displaying the following text:

It subscribes to an e-zi
0000000001
Mr/Ms Blackman,Chris
Push Enter to Execute

The dialog has two buttons: "Close" and "Enter".

S/N	Cust.Code	Cust.Name
1	0000000001	Mr/Ms Blackman,Chris
2	0000000002	Mr/Ms Long,Edward
3	0000000003	Mr/Ms H
4	0000000004	Mr/Ms H
5	0000000005	Mr/Ms C
6	0000000006	Mr/Ms H
7	0000000007	Mr/Ms L
8	0000000008	Mr/Ms S
9	0000000009	Mr/Ms A
10	0000000010	Mr/Ms M
11	0000000011	Mr/Ms V
12	0000000012	Mr/Ms Doyle,Isabel

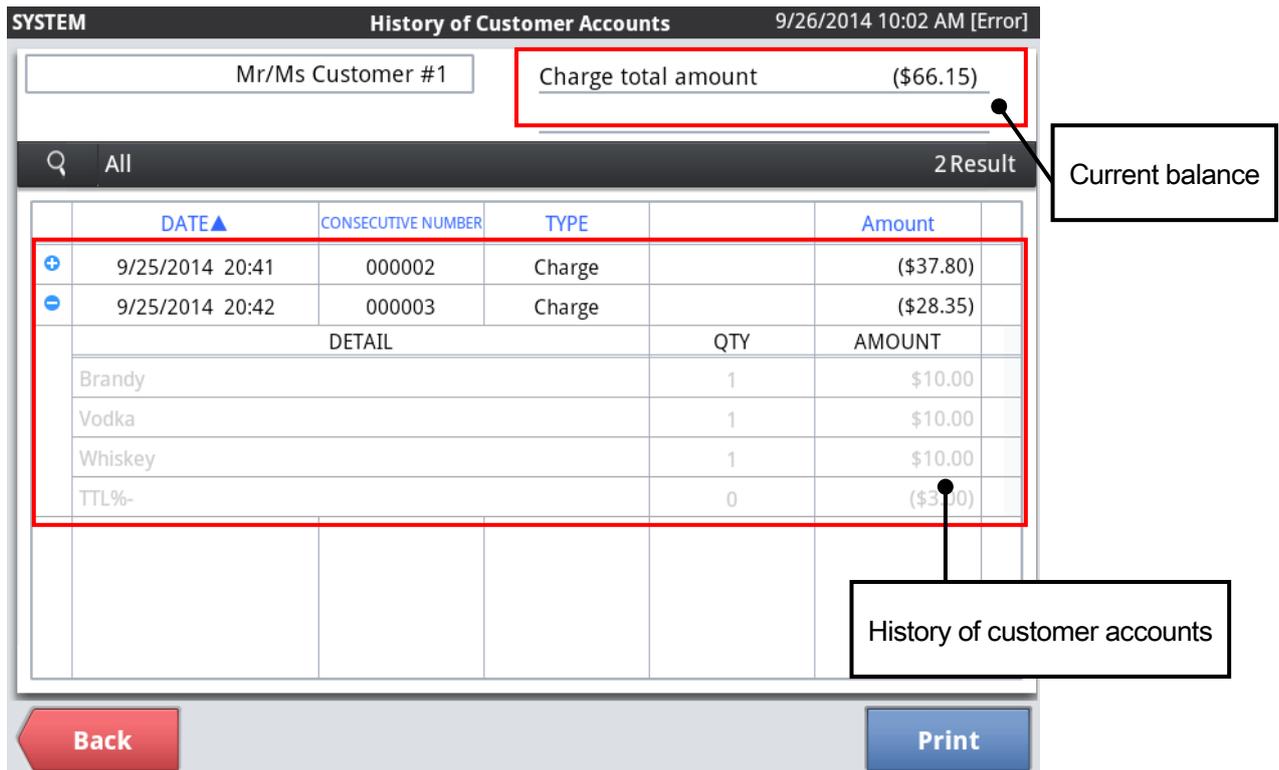
Customer Information	
Cust.Code	0000000001
Cust.Name	Mr/Ms Blackman,Chris
1:Male	
7/15/65	
01234567890	
c-black@casio.sample.com	
1234567	
1600 Pennsylvania Avenu,NW	
Washington,DC	
function	

Navigation buttons: New, Edit, Delete, Search, Function, Close.

2.1.8.7. History of Customer Accounts

You can check history of customer accounts and current balance of each customer.

- Tap the List area on the main screen and then tap <Function> button while the details are displayed.
- Select [History of Customer Accounts].
- About Customer Accounts, please refer the other page on this manual.



- Tap the icon **+** , detail of transaction is opened.
- Tap the icon **-** , detail of transaction is closed.
- Tap the icon **Q** , you can search by some conditions.
- Tap <Print> button, the dialog will appear.

Print	Print index and opened detail.
Save as PDF file	Save index and opened detail.

■ Print

Print out report like the following.

Store Stamp				(1)
***** Receipt top message 1 *****				(2)
***** Receipt top message 2 *****				(2)
2015/01/01	18:00	MANAGER#003		Print date / time / clerk name of report issuing
Customer statement report				
Period	2015/12/01—2015/12/31			(3)
Customer# 0000000001				Customer number and name
Mr Customer #1				
PREVIOUS BALANCE		@0		} (4)
TOTAL PAYMENT		@0		
TOTAL CHARGE		@1,800		
NEW BALANCE		(@1,800)		
2014/12/20	20:20	000001		
		CASHIER#001		
CHARGE		@1,800		Transaction type
ITEM A	1	@1,000		} Details of transaction. Print if it is opened on display.
ITEM B	1	@1,000		
TTL%-		-@200		
CHARGE	1	@1,800		
	TA	TAX	TTL	
TX1	@1,667	@133	@1,800	
TOTAL CHARGE @1,800				} Total amount of CHARGE and Total amount of tax on CHARGE.
	TA	TAX	TTL	
TX1	@1,667	@133	@1,800	

(1) Store Stamp

Print graphic logo (Store Stamp) saved in printer.

If graphic logo data is not set (CSB008 GRAPHICCODE=00001 and 000011 are “null”), it is not printed.

Refer [Sales management Programming and Reference Manual], you can get more information about how to save graphic logo to printer.

GRAPHICCODE	Purpose
000001	Receipt logo 1 (built-in printer)
000011	Receipt logo 1 (external printer)

* If you wish to stop printing graphic logo, change the setting on DB.

Refer [Sales management Programming and Reference Manual], and program like the following.

print or not print Store Stamp	
Table	Customer CMB001 Customer setting
SETKEY	CUSTCREDIT.REPORT.FLAG.GRAPHIC
SETVALUE	0 :not print 1 :print

(2) Receipt top message 1, 2

Print receipt top message 1 and 2.

Refer [Sales management Programming and Reference Manual], you can get more information about how to program message.

Title	Value
Receipt top message 1	Assigns message 1 which is printed on upper part of receipts. Set for 58 mm and 80 mm width individually.
Receipt to message 2	Assigns message 2 which is printed on upper part of receipts. Set for 58 mm and 80 mm width individually.

* If you wish to stop printing message, change the setting on DB.

Refer [Sales management Programming and Reference Manual], and program like the following.

print or not print Receipt top message 1	
Table	Customer CMB001 Customer setting
SETKEY	CUSTCREDIT.REPORT.FLAG.MESSAGE1
SETVALUE	0 :not print 1 :print

print or not print Receipt top message 2	
Table	Customer CMB001 Customer setting
SETKEY	CUSTCREDIT.REPORT.FLAG.MESSAGE2
SETVALUE	0 :not print 1 :print

(3) Period

Print the period if you search by date.

(4) Summary

Title	Value
PREVIOUS BALANCE	Previous balance before selected date. If there is no selection of period, does not print.
TOTAL PAYMENT	Total amount of DEPOSIT. If you select the period, the amount is total in selected period.
TOTAL CHARGE	Total amount of CHARGE. If you select the period, the amount is total in selected period.
NEW BALANCE	Current balance. If you select the period, the balance is latest amount in selected period.

- Save as PDF file

Tap <Save as PDF>, the display of Save PDF file will appear.

- * About function of PDF, refer other page on this manual.
- * The customer number is added to prefix file name.

/mnt/sdcard/CASIO/
 Customer/0000000001_CustomerCreditDetail_201501081
 33027.pdf

- * PDF file sample

YOUR RECEIPT THANK YOU CALL AGAIN				Page 1/1 2/13/2015
YOUR RECEIPT THANK YOU CALL AGAIN				
Customer statement report				
Customer# 0000000001		Period 2/13/2015 -- 2/13/2015		
Mr/Ms Customer #1				
PREVIOUS BALANCE	\$0.00			
TOTAL PAYMENT	\$0.00			
TOTAL CHARGE	\$47.25			
NEW BALANCE	(\$47.25)			
<hr/>				
2/13/2015	14:04	000001	SYSTEM	
	CHARGE			\$47.25
	Coffee		1	\$10.00
	Café latte		1	\$10.00
	Iced coffee		1	\$10.00
	Espresso		1	\$10.00
	Cappuccino		1	\$10.00
	TTL%-			(\$5.00)
	CHARGE		1	\$47.25
		TA	TAX	TTL
	TX1	\$45.00	\$2.25	\$47.25
<hr/>				
TOTAL CHARGE		\$47.25		
		TA	TAX	TTL
	TX1	\$45.00	\$2.25	\$47.25

- * not print clerk name of report issuing

2.1.8.8. Print customer statement report

You can do batch print of reports of history of customer accounts.

- Tap the List area on the main screen and then tap <Function> button while the details are displayed.
- Select [customer statement report].
- Batch or individual customer can be selected.

Title	
Set period	Set the period of statement.
print or save	Select "print" or "save as PDF file".
path of file saved	Set path of PDF file.
with details	tick: output statement with details. un-tick: output statement without details.
Skip the balance zero customer	tick: skip to output the zero-balance customers. un-tick: output the zero-balance customers who has transaction in specified period.

- Tap <OK> button, then start to printing.

2.2. Customer Analysis

2.2.1. Base Screen

Layout of Customer Analysis Base Screen

The screenshot shows the 'Customer Analysis' interface. At the top, it displays 'Customer Analysis' and the date/time '4/27/12 5:26 PM'. Below this is a header bar with 'All' and '13Result'. The main area is divided into two panels. The left panel, labeled 'B. List of customers', contains a table with columns S/N, Cust.Name, R, F, M, and P. The right panel, labeled 'C. Detail Information', shows 'Analysis Information' (Recency, Frequency, Monetary, Total Point) and 'Customer Information' (Cust.Code, Cust.Name, Description, Sex, Birthday). At the bottom, there are four buttons: 'Rank', 'Search', 'Function', and 'Close', with the 'Rank' button labeled 'D. Feature button region'. Red boxes highlight these specific areas.

S/N	Cust.Name	R	F	M	P
1	Mr/Ms Blackman,Chris	5	5	5	15
2	Mr/Ms Long,Edward	5	5	5	15
3	Mr/Ms Harris,Angela	0	0	0	0
4	Mr/Ms Higgins,Paula	0	0	0	0
5	Mr/Ms Green,Albert	0	0	0	0
6	Mr/Ms Knight,Karen	0	0	0	0
7	Mr/Ms Knight,Karen	0	0	0	0
8	Mr/Ms Knight,Karen	0	0	0	0
9	Mr/Ms Adams,Walter	0	0	0	0
10	Mr/Ms Macklin,Judy	0	0	0	0
11	Mr/Ms Wilson,Ed	0	0	0	0
12	Mr/Ms Doyle,Isabel	0	0	0	0

Analysis Information

Recency	5 4/27/12
Frequency	5 1
Monetary	5 \$462.00
Total Point	15

Customer Information

Cust.Code	0000000001
Cust.Name	Mr/Ms Blackman,Chris
Description	
Sex	1:Male
Birthday	4/15/80

function
CUSTOMER 10%-

A. Search region

- Display the number of the customer appropriate by RFM Analysis.
- When the tap of the search region is carried out, a search condition input dialog will be displayed.

B. List display region

- Indicate a customer's RFM value specified by the search condition of A, and the comprehensive rank (P) by list.
- When the tap of the list is carried out, the customer's detailed information will be displayed on the detailed display region of C.

C. Detailed display region

- Display a customer's details of purchase and a customer's details which carried out the tap in the list display region of B.

D. Feature button region

- display the feature button which can be operated on the screen.

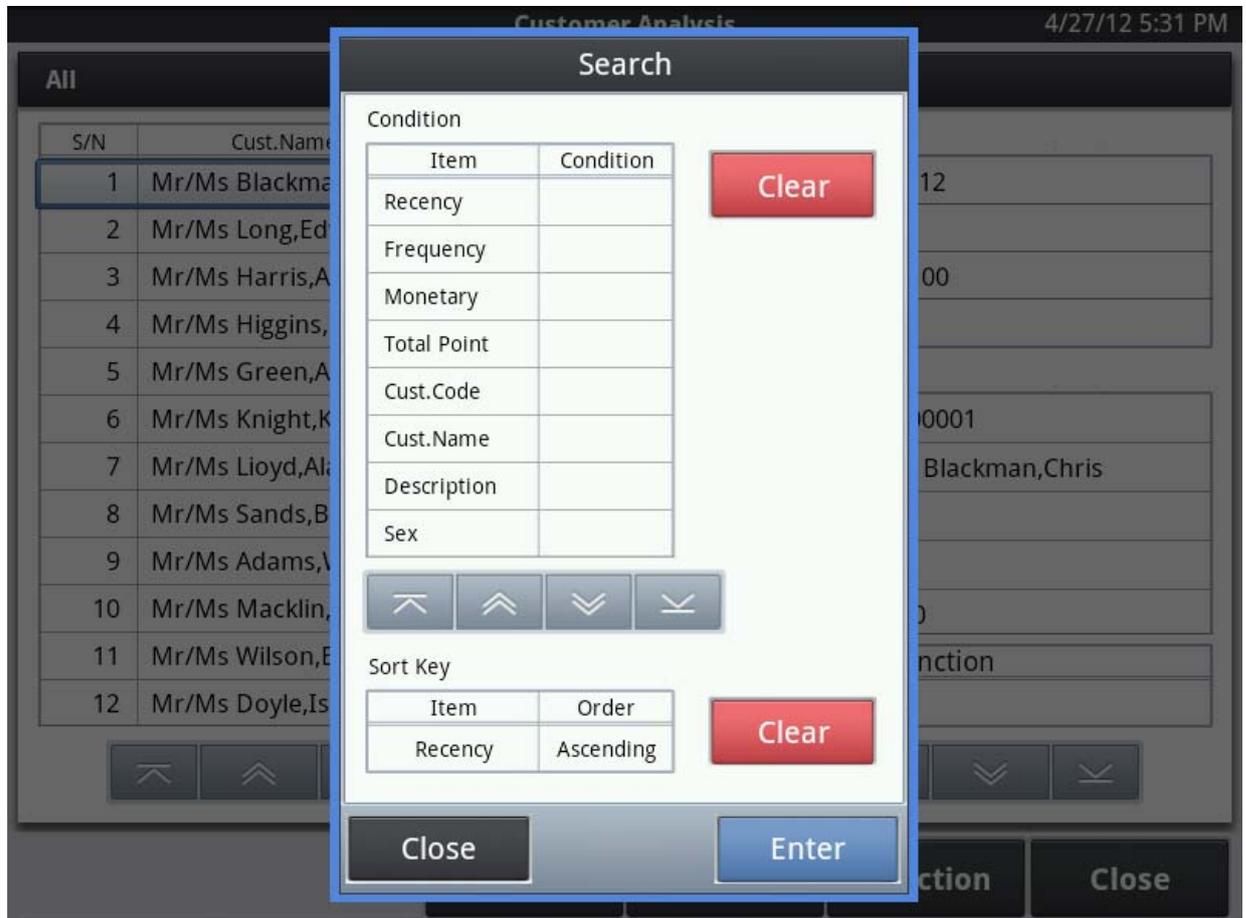
2.2.2. Rank Settings

The standard value of the five-step rank used for RFM Analysis

See RFM Analysis.

2.2.3. Search from Result of RFM Analysis

Rank conditions are specified, the result of RFM Analysis is sorted with search, and a list is displayed.



A search dialog will be displayed when the tap of the search region of a base screen is carried out. Search condition item.

A search condition can be inputted by carrying out a tap.

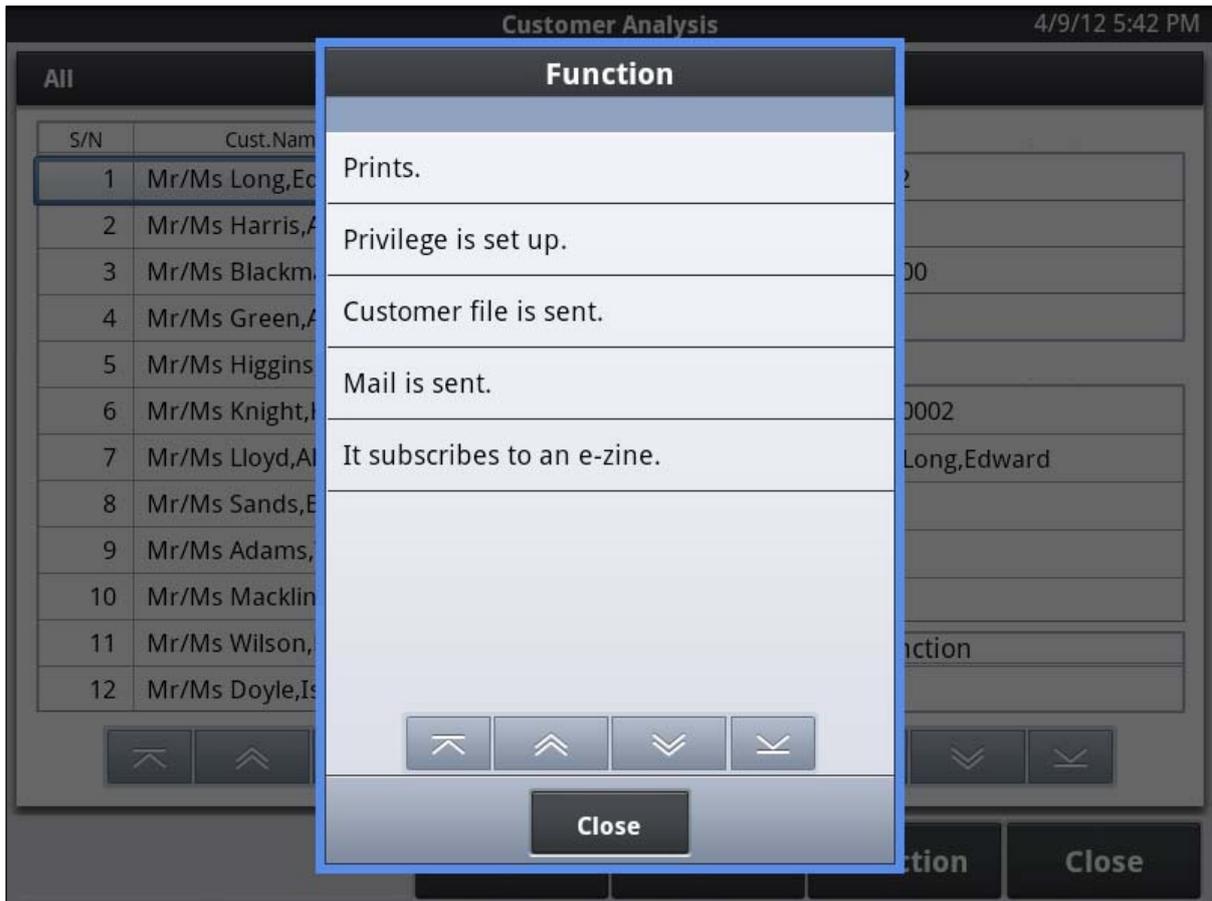
(The example of a search condition input)

Condition	
Item	Recency
Match both conditions 1 and 2	
Condition1	
Condition	Numerical values above
Value	50000
Condition2	
Condition	Numerical values below
Value	100000

Close

- The sorting method can be specified by carrying out the tap of the sorting item.
- After inputting a search condition and sorting conditions, if the tap of the <Enter> is carried out, it will search, and display a result on a list display region.
- When you stop search, please carry out the tap of the <Close>.

2.2.4. Function

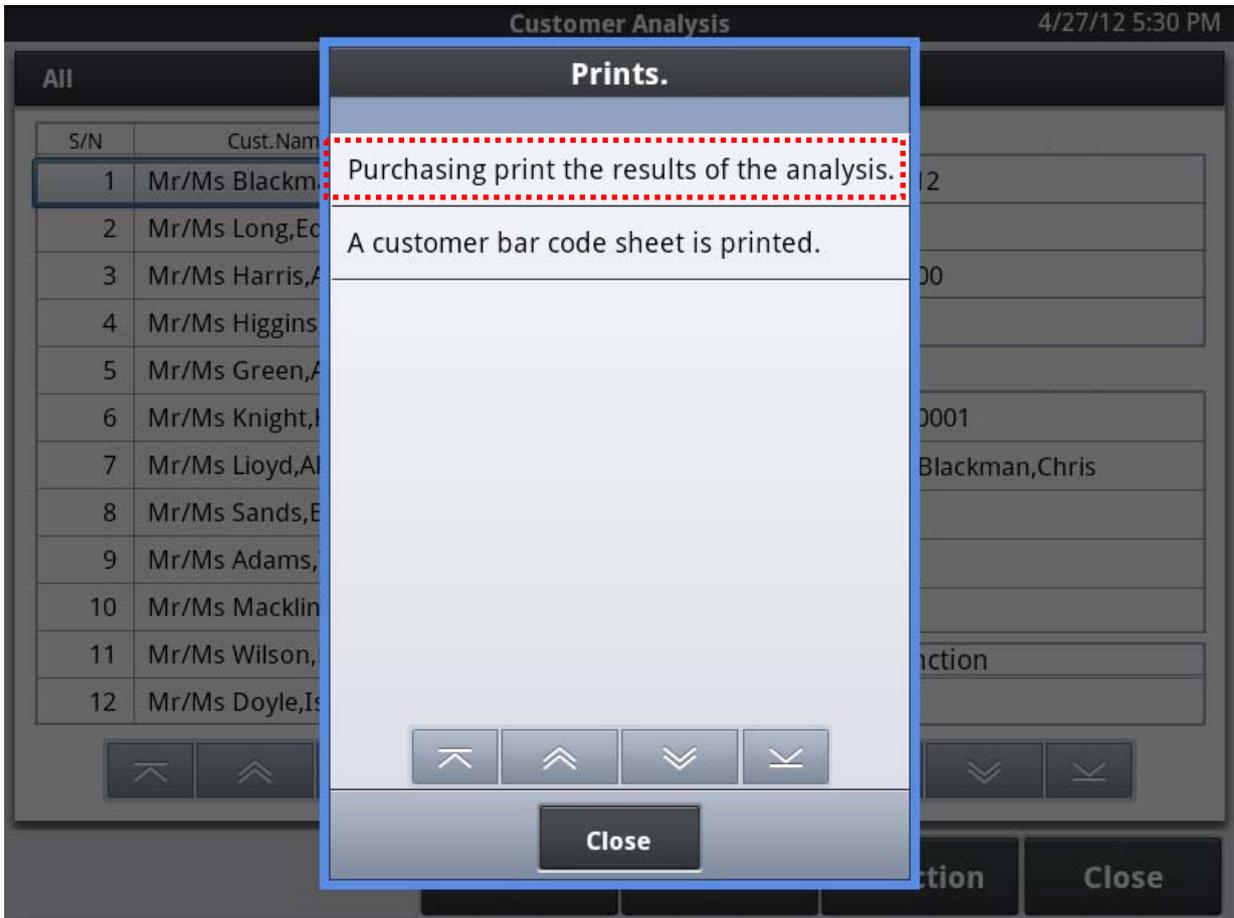


Functions:

- Print result of RFM Analysis, Print Customer Bar Code.
- The privilege to a customer is set up. (Giving a discount) (*)
- Send Customer File to Administrator as E-Mail attachment (*)
- Send E-Mail to Customer as DM (*)
- E-Mail Magazine Subscription for CXD NEXT(*)

(*): These functions are the same as Customer Note.

2.2.4.1. Print out Result of Customer Analysis



- When the tap of the <print> of a base screen is carried out, print of a RFM Analysis result will be made.
- Selection of [Batch Print] and [Individual Print] can be performed.
- In [Batch Print], print the information of all the customers of a list display region.
- In [Individual Print], print a customer's information specified in the list display region.

2.2.4.2. Print out Customer Scanning Code

- In [Customer Bar Code Sheet is printed], VX prints Customer Bar Code (Scanning Code. Not Customer Code) on EAN 12 + 1 (Check Digit)

2.2.4.3. Setting for Customer Privilege

The privilege to a customer is set up. (Giving a discount)

2.3. Settings for Customer File

2.3.1. Main Menu

Layout of settings function

Customer Settings 4/27/12 5:05 PM

Item List RFM Function. Protection. Set

S/N	Item	Label	Control	Input Method	List
1	Cust.Code	Cust.Code	On	Auto	
2	ScanCode	ScanCode	Off	Number	
3	ScanCode-2	ScanCode-2	Off	Number	
4	Cust.Name	Cust.Name	On	Character	
5	Description	Description	On	Character	
6	Sex	Sex	On	Sex	
7	Birthday	Birthday	On	Date	
8	Tel	Tel	On	Telephone Nu...	
9	Tel-2	Tel-2	Off	Telephone Nu...	
10	Fax	Fax	Off	Telephone Nu...	
11	Fax-2	Fax-2	Off	Telephone Nu...	
12	Email	Email	On	Character	

Navigation buttons: < > < >

Buttons: Edit Close

A. Select functions

B. List of items and edit area

C. Function button area

A . Select functions

- Functions can be selected by tapping the tab area

B . List of items and edit area

- Shows items where specified by "Select functions" for item edit.

C . Function button area

- Available function keys are displayed

2.3.2. Customer File Settings

The item name of Customer File information and the existence of the item are set up.

S/N	Item	Label	Control	Input Method	List
1	Cust.Code	Cust.Code	On	Auto	
2	ScanCode	ScanCode	Off	Number	
3	ScanCode-2	ScanCode-2	Off	Number	
4	Cust.Name	Cust.Name	On	Character	
5	Description	Description	On	Character	
6	Sex	Sex	On	Sex	
7	Birthday	Birthday	On	Date	
8	Tel	Tel	On	Telephone Nu...	
9	Tel-2	Tel-2	Off	Telephone Nu...	
10	Fax	Fax	Off	Telephone Nu...	
11	Fax-2	Fax-2	Off	Telephone Nu...	
12	Email	Email	On	Character	

- A Customer Information item can be changed by carrying out the tap of the <Edit> of the base screen of an item tab.
- Carry out the tap of the display name and change the display name of a Customer Information item.
- Carry out the tap of the display existence and change the display existence of a Customer Information item.
- However, the following items are not made to the display OFF. (It always displays)
 1. Customer Code
 2. Customer Name
 3. Sex
 4. Telephone Number
 5. Customer Registration Day

6. Use Improper Flag

- If the tap of <upward arrow> is carried out, the item specified will be moved upwards.
- If the tap of <downward arrow> is carried out, the item specified will be moved downward.
- About an arbitrary item, the input method can be changed by carrying out the tap of the input method.

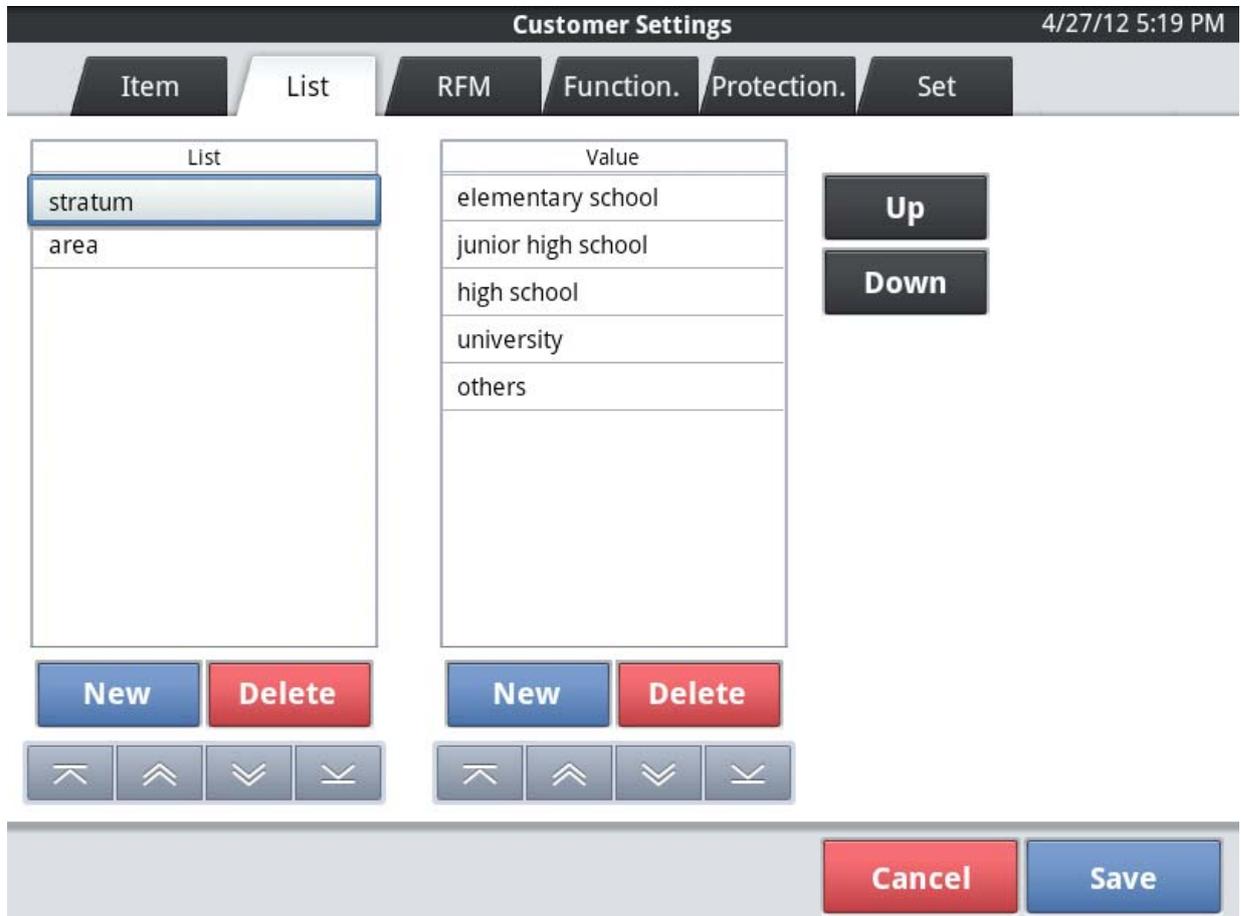


- 1. Character: A software keyboard performs a character input.
- 2. Number: It inputs in a number input dialog.
- 3. Date: It inputs in the date input dialog.
- 4. Time: It inputs in a time input dialog.
- 5. Telephone number: It inputs in a telephone number input dialog.
- 6. Sex: It chooses from a choice. (with a man, a woman, and no specification)
- 7. Candidate (List): The choice set up with the candidate tab is displayed and chosen.
- If the tap of <Save> button is carried out, the modify result of a setup will be saved and it will return to a base screen.

- When you stop a setup, please carry out the tap of <Close>button.

2.3.3. Set Up Candidates (List) of Customer File

It is possible to program candidates for Customer Information



1. Change to the correction screen of [List] and [Value] by carrying out the tap of the [Edit] button of the base screen of [List Tab].
2. If the tap of the [List] is carried out, the candidate value (choice) corresponding to it will be displayed.
3. Carry out the tap of the [New] button by the side of [List], and create a new candidate name.
4. Carry out the tap of the [Delete] button on the side of [List], and delete the candidate name specified. First, please delete all the candidate values of a candidate name to delete.

5. Carry out the tap of the [New] button on the side of [Value], and create a new candidate value.
6. Carry out the tap of the [Delete] button on the side of [Value], and delete the specified candidate value.
7. Where [List] or [Value] is specified, a display order can be changed if the tap of < upward arrow > and < downward arrow > is carried out.
8. If the tap of the [Save] button on the side of [List] is carried out, the change result of a setup will be saved and it will return to the base screen.
9. When you stop a setup, please carry out the tap of the [Cancel button].

2.3.4. Setting of RFM Analysis

The standard value of the five-step rank used for RFM Analysis

Customer Settings
4/27/12 5:21 PM

Item
List
RFM
Function.
Protection.
Set

Recency	
Rank	Criterion value
5	10 within
4	20 within
3	30 within
2	40 within
1	41 before

Frequency	
Rank	Criterion value
5	50 over
4	40 over
3	30 over
2	20 over
1	20 under

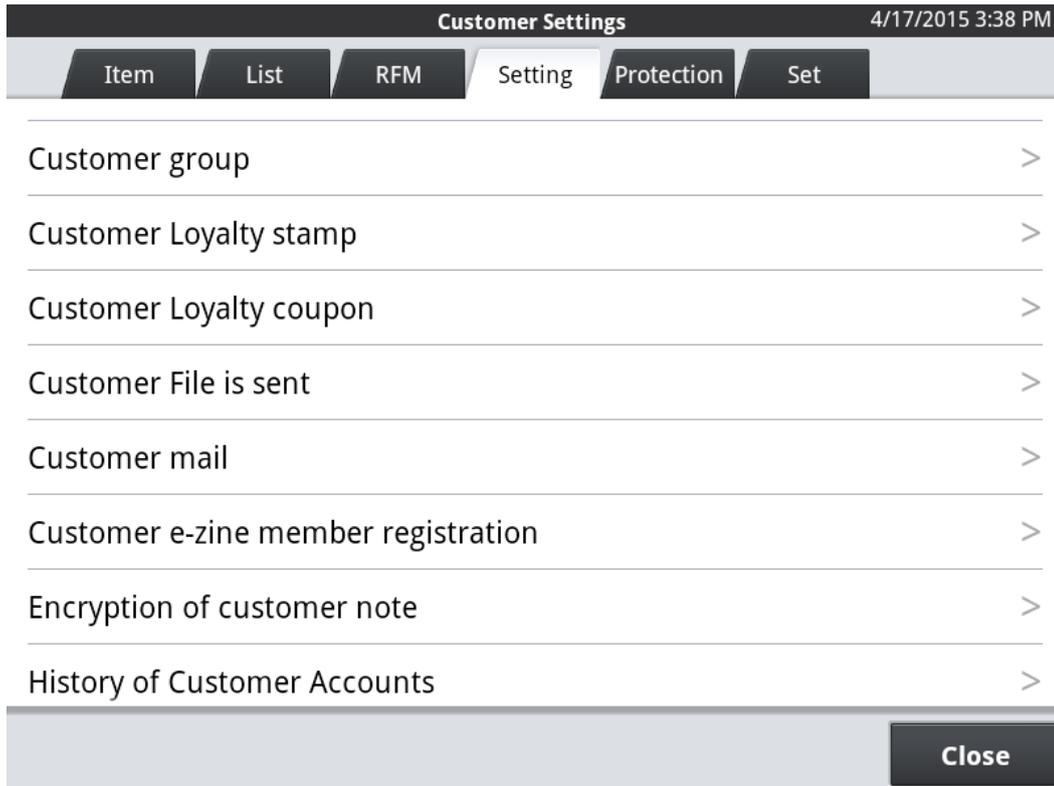
Monetary	
Rank	Criterion value
5	\$1,000.00 over
4	\$800.00 over
3	\$600.00 over
2	\$400.00 over
1	\$400.00 under

Cancel

Save

- Each standard value can be changed by carrying out the tap of the <edit> button of the RFM tab.
- The tap of the standard value table of each RFM is carried out, and a value is changed.
- If the tap of <Save> button is carried out, the change result of a setup will be saved and it will return to the base screen.
- When you stop a setup, please carry out the tap of the <Cancel> button.

2.3.5. Functions (On Customer Setting)



Function:

- Customer group setting.
 - Set the Customer group name and options that are loyalty discount, Credit limit amount, and loyalty stamp.
- Setting for Stamp
- Setting for Coupon
- Setting for Administrator E-Mail Address to send Customer File
- Setting for Contents of E-Mail
- Setting for E-Mail Magazine Subscription Information for CXD NEXT
- Setting for history of customer accounts

2.3.5.1. Customer group setting

S/N	Group Code	Group Name
1	000001	Customer Group 01

Customer Information	
Group Code	000001
Group Name	Customer Group 01
Loyalty discount keycode	TTL%-
Loyalty discount value	10
Credit Limit amount	Unlimited
Use a Customer Loyalty stamp function	No

- Group code
Set the customer group code. Code needs to be unique.
- Group name
Set the name of customer group.
- Loyalty discount keycode.
Select the loyalty from keycode. Rate discount and Amount discount are in the list.
- Loyalty discount value.
Enter the values for Loyalty discount keycode. When the "0" value is entered , discount function works as the setting is preset amount and preset rate.

Rate : The keycode is Rate discount function

Amount: The keycode is Amount discount function, .

- Credit limit amount

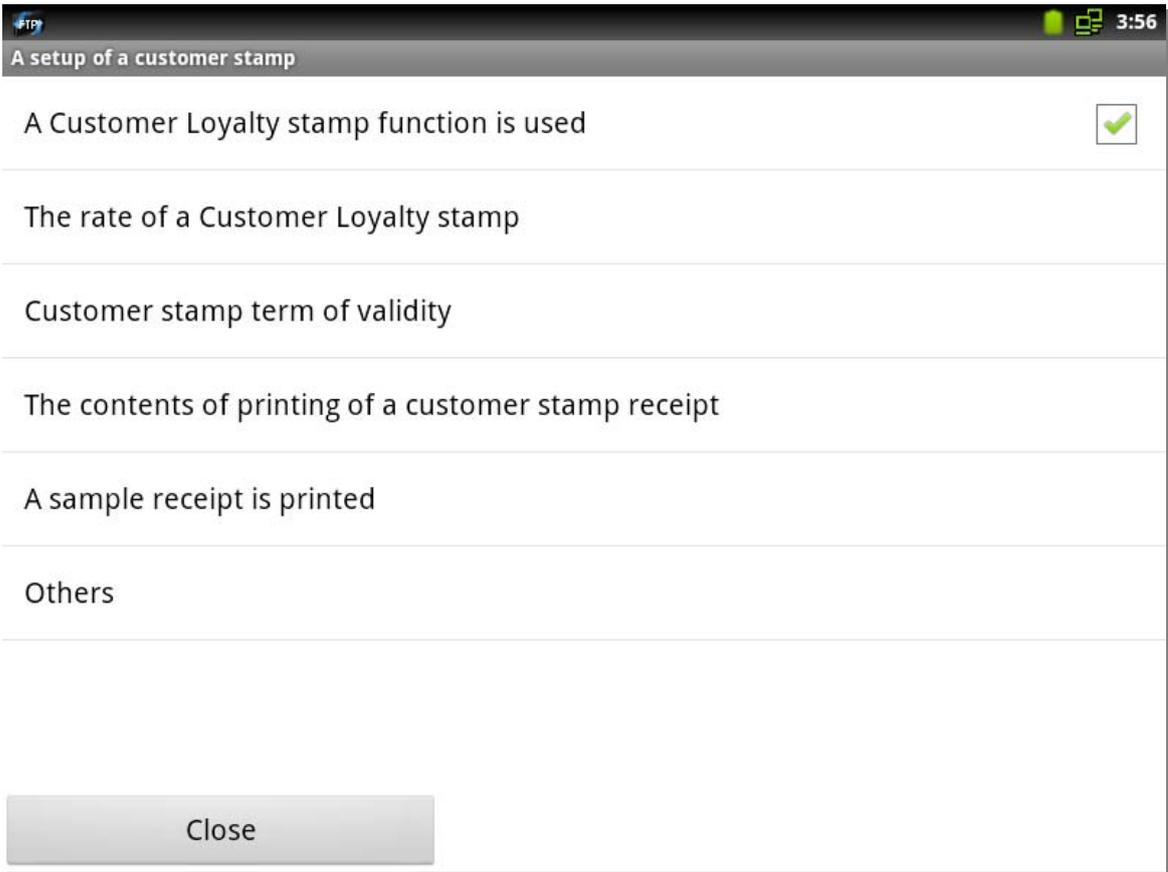
Select "Unlimited" or "Enter AMT" from the list dialog, Numeric dialog will be shown when the Enter AMT is selected.

- Use a Customer Loyalty stamp function.

The setting is valid when the Loyalty stamp function is used flag is OFF at **2.3.5.2 Setting for stamp** .

2.3.5.2. Setting for Stamp

- Setting for Stamp



A setup of a customer stamp

A Customer Loyalty stamp function is used

The rate of a Customer Loyalty stamp

Customer stamp term of validity

The contents of printing of a customer stamp receipt

A sample receipt is printed

Others

Close

- Select use or not the customer loyalty stamp function for all customers. When the loyalty stamp function needs to be controlled by customer group, this flag needs to be OFF.

Rate Setting

Select unit of Stamp issuing.

unit of Stamp issuing	
per sales amount	Stamp is issued per sales amount.
per one transaction	Stamp is issued per one transaction.
per sales quantity	Stamp is issued per sales quantity.

- Tap <Next> to program more settings.
- Tap <Cancellation> to cancel this process.

Per Sales Amount

The rate of a Customer Loyalty stamp

The amount to be converted to stamp

The total amount of payment

The total amount of the stamp target item

The amount of money which publishes one stamp

Magnification of a stamp

x1 x3

x2 x4

The number of expiration stamps

The number of service stamps to a new customer

Save
Cancellation

Per One Transaction

The rate of a Customer Loyalty stamp

Only one time Stamp issuing in one day.

amount
Stamp is issued if the amount is over set amount.

The amount to be converted to stamp

The total amount of payment

The total amount of the stamp target item

Magnification of a stamp

x1 x3

x2 x4

The number of expiration stamps

Save
Cancellation

Per Sales Quantity

The rate of a Customer Loyalty stamp

The quantity which issue one stamp.

Magnification of a stamp

x1 x3

x2 x4

The number of expiration stamps

The number of service stamps to a new customer

Save Cancellation

Stamp Valid Term Setting.

A setup of a customer stamp.

A Customer Loyalty stamp

The rate of a Customer Loyalty stamp

Customer stamp magnification

The contents of a Customer Loyalty stamp

A sample receipt

Customer stamp term of validity.

Opening day.

From the card date of issue.

From the last stamp date of issue.

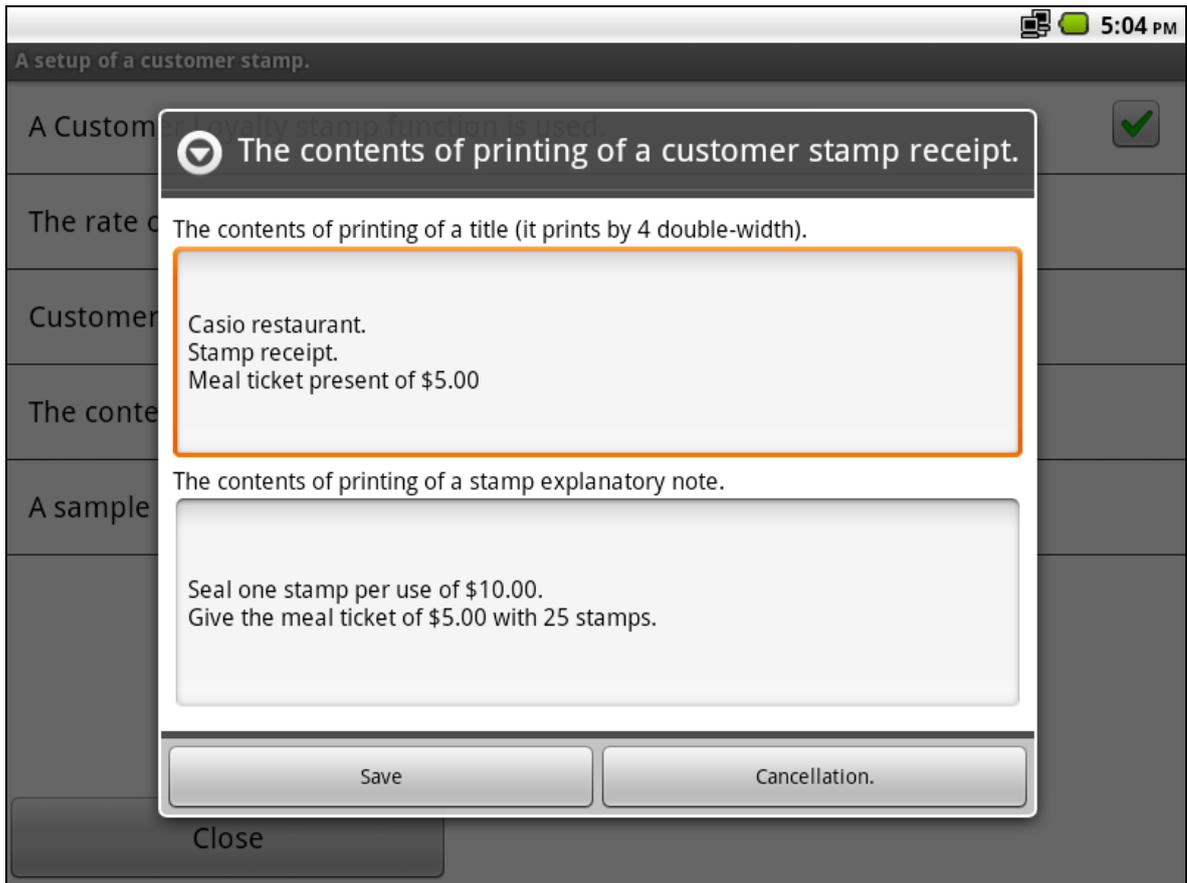
Up to when.

 monthly.

Save Cancellation.

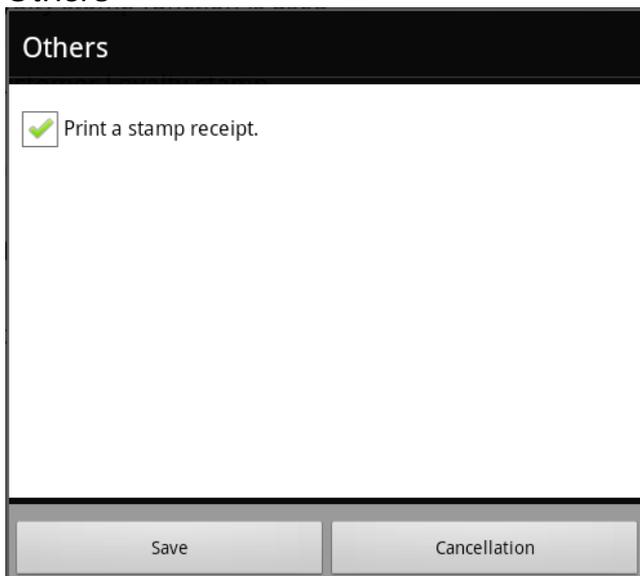
5:03 PM

Stamp Contents Settings



Sample Stamp Issus is Available.

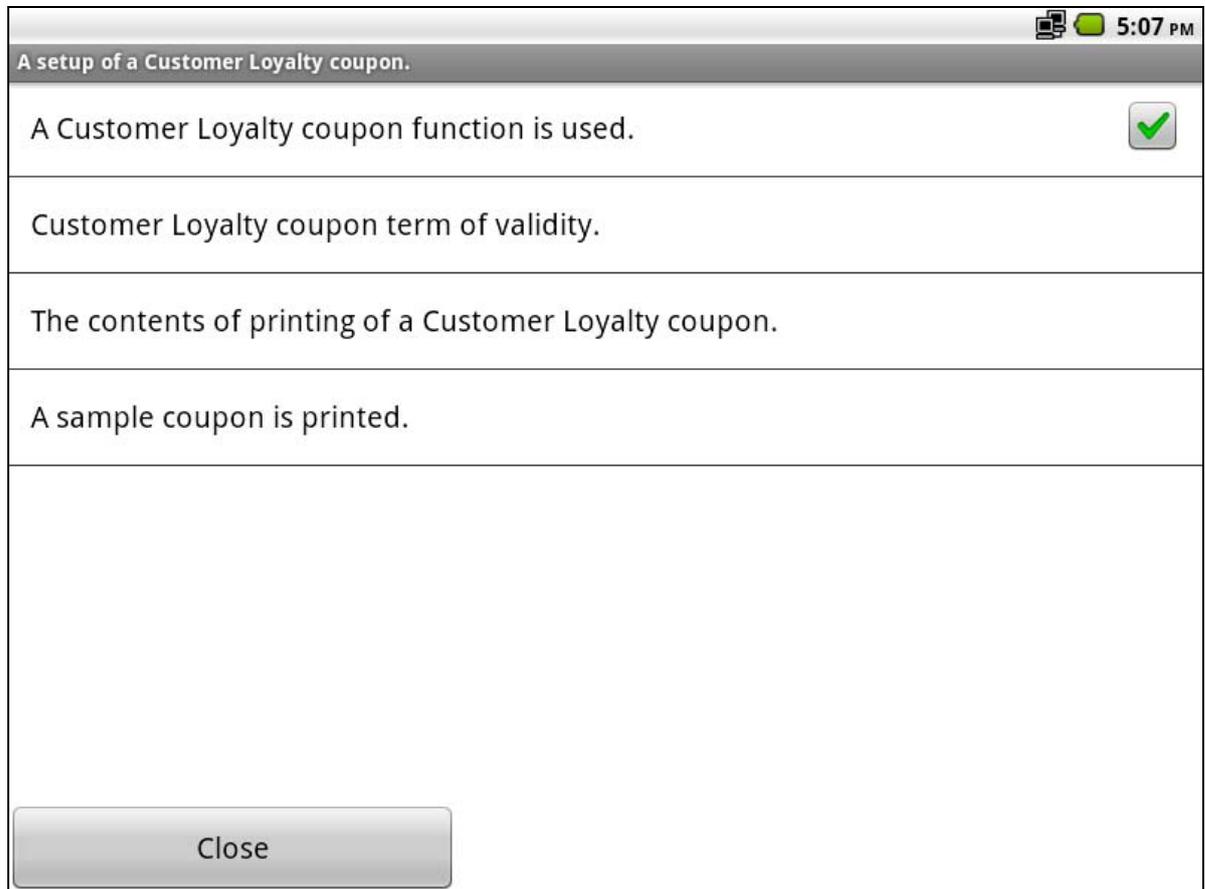
Others



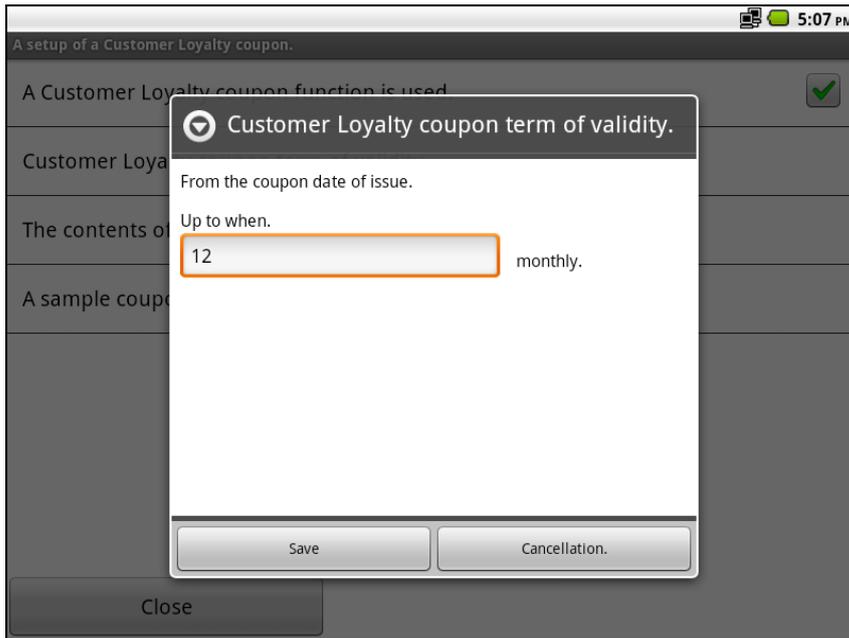
tick: not print the customer loyalty stamp receipt.
un-tick: print the customer loyalty stamp receipt.

2.3.5.3. Coupon Setting

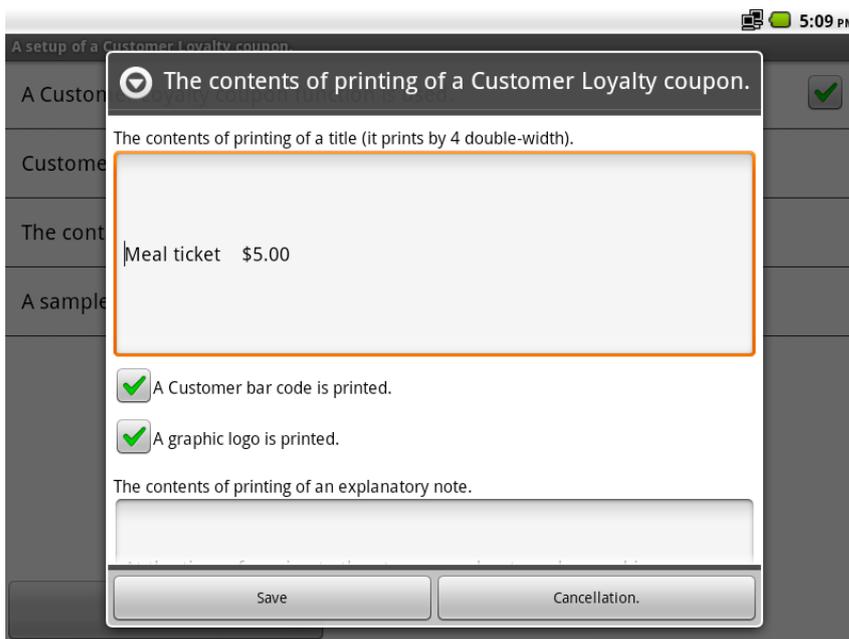
Setting for Coupon



Coupon Valid Term Setting



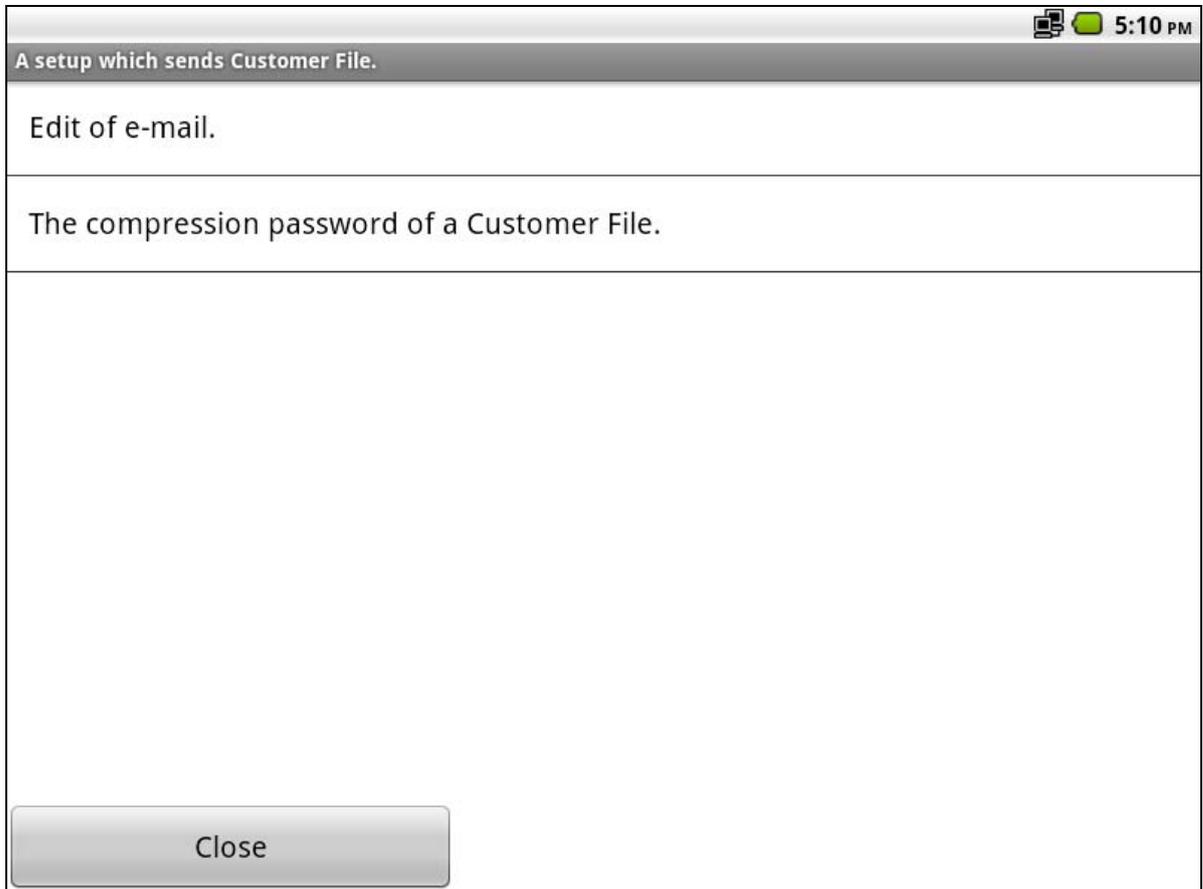
Coupon Contents Setting



Sample Stamp Issus is Available.

2.3.5.4. Setting for Administrator to send Customer File

- Setting for Administrator E-Mail Address to send Customer File



Tap <Edit of E-Mail>, Enter Administrator E-Mail Address to send Customer File.

A setup which sends Customer File.

5:10 PM

Edit of e-mail.

Address.

Subject name.

VX data attachment.

Text.

From VX to transmission.

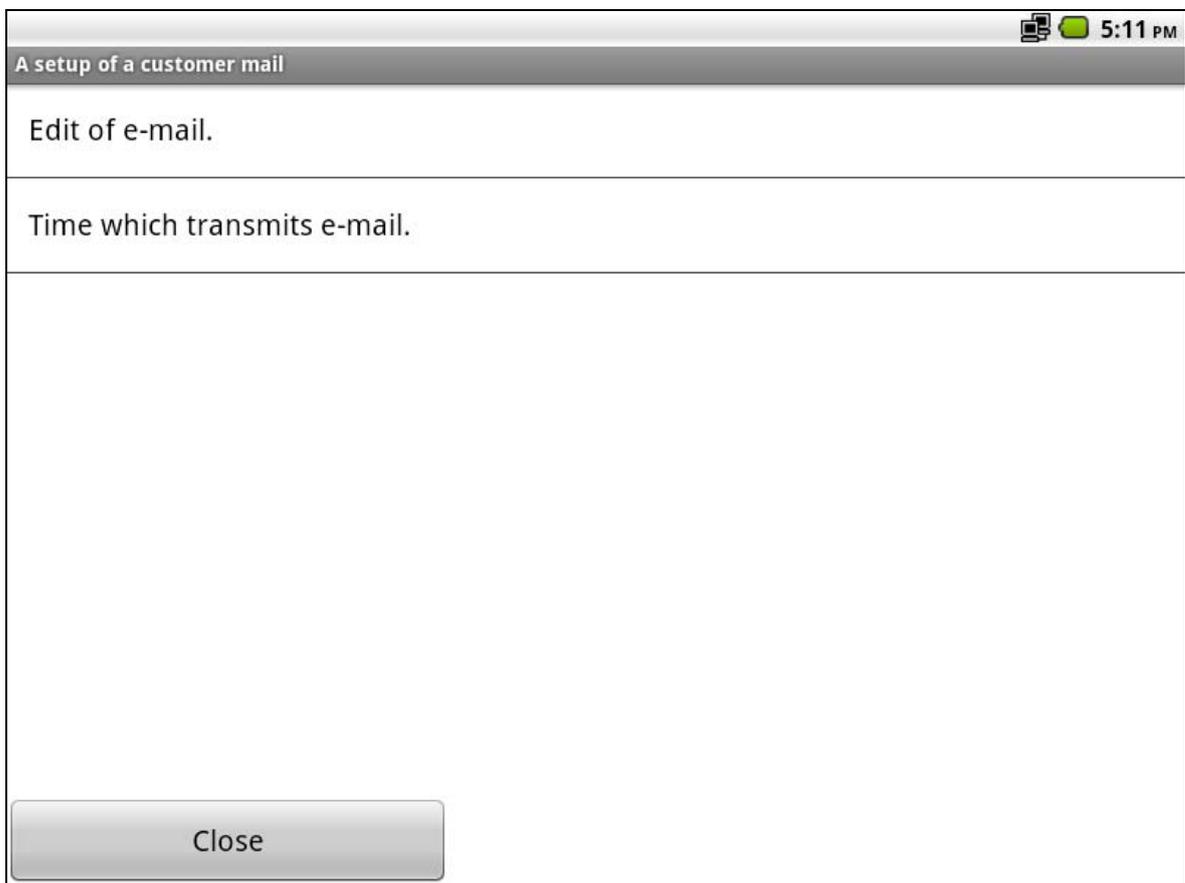
Save Cancellation.

Tap <The compression password of a Customer File >, Enter password.

The screenshot shows an Android application interface. At the top, there is a status bar with the time 5:11 PM. Below it, a dark header bar contains the text "A setup which sends Customer File." and a back arrow icon. The main content area is divided into sections: "Edit of e-mail" and "The compression password of a Customer File". A modal dialog box is displayed over the "The compression password of a Customer File" section. The dialog has a title bar with a back arrow and the text "The compression password of a Customer File.". Inside the dialog, there are three text input fields: the first is labeled "The present password.", the second is labeled "A new password.", and the third is labeled "It reinputs for a check (new password).". At the bottom of the dialog, there are two buttons: "Save" and "Cancellation.". The background of the application is dimmed.

2.3.5.5. Customer mail

- Setting for Contents of E-Mail



The screenshot shows a mobile application window with a title bar at the top right containing a battery icon and the time "5:11 PM". The window title is "A setup of a customer mail". The main content area is divided into three sections by horizontal lines. The first section contains the text "Edit of e-mail.". The second section contains the text "Time which transmits e-mail.". The third section is a large empty rectangular area. At the bottom left of the window, there is a grey button with the text "Close".

Tap <Edit of E-Mail >, Enter contents.

A setup of a customer mail

5:12 PM

Edit of e-mail.

Time which tra

Close

◀ Edit of e-mail.

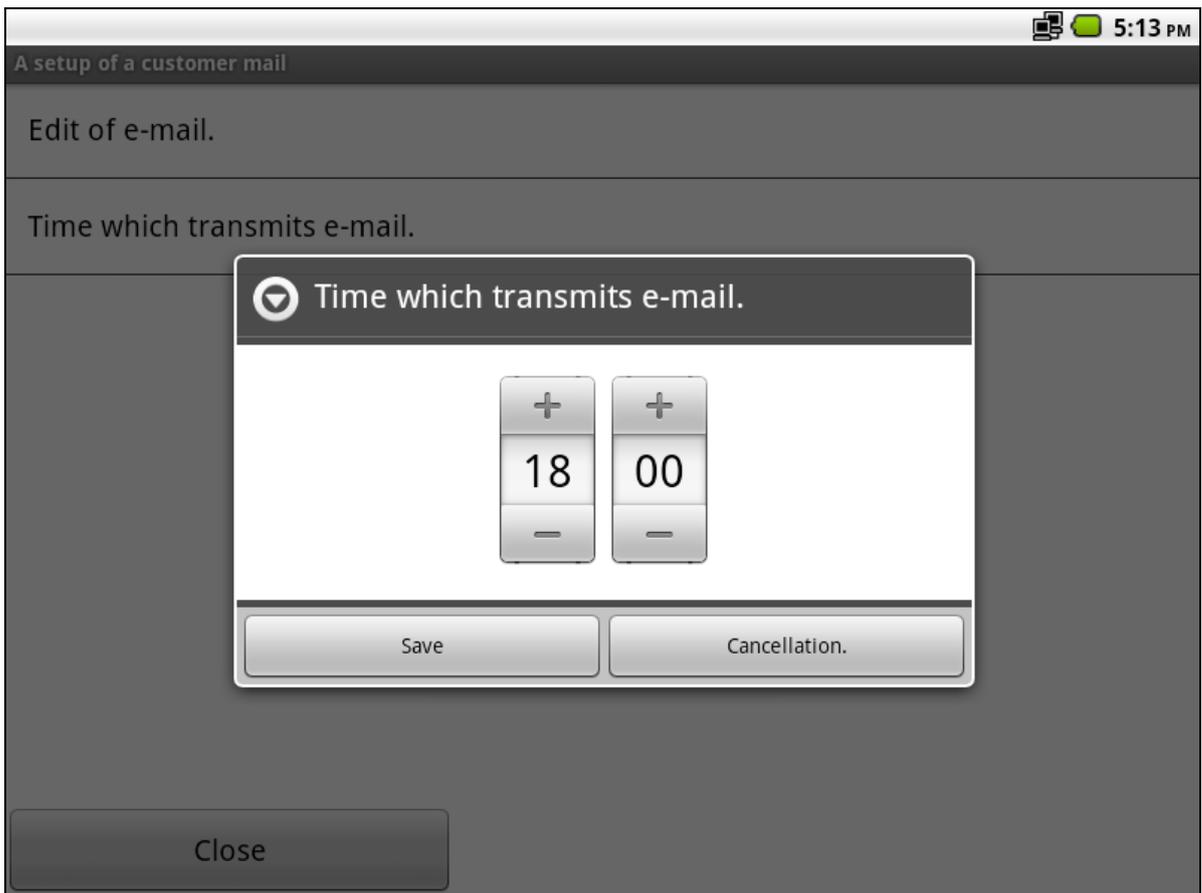
Subject name.

Text.

Signature.

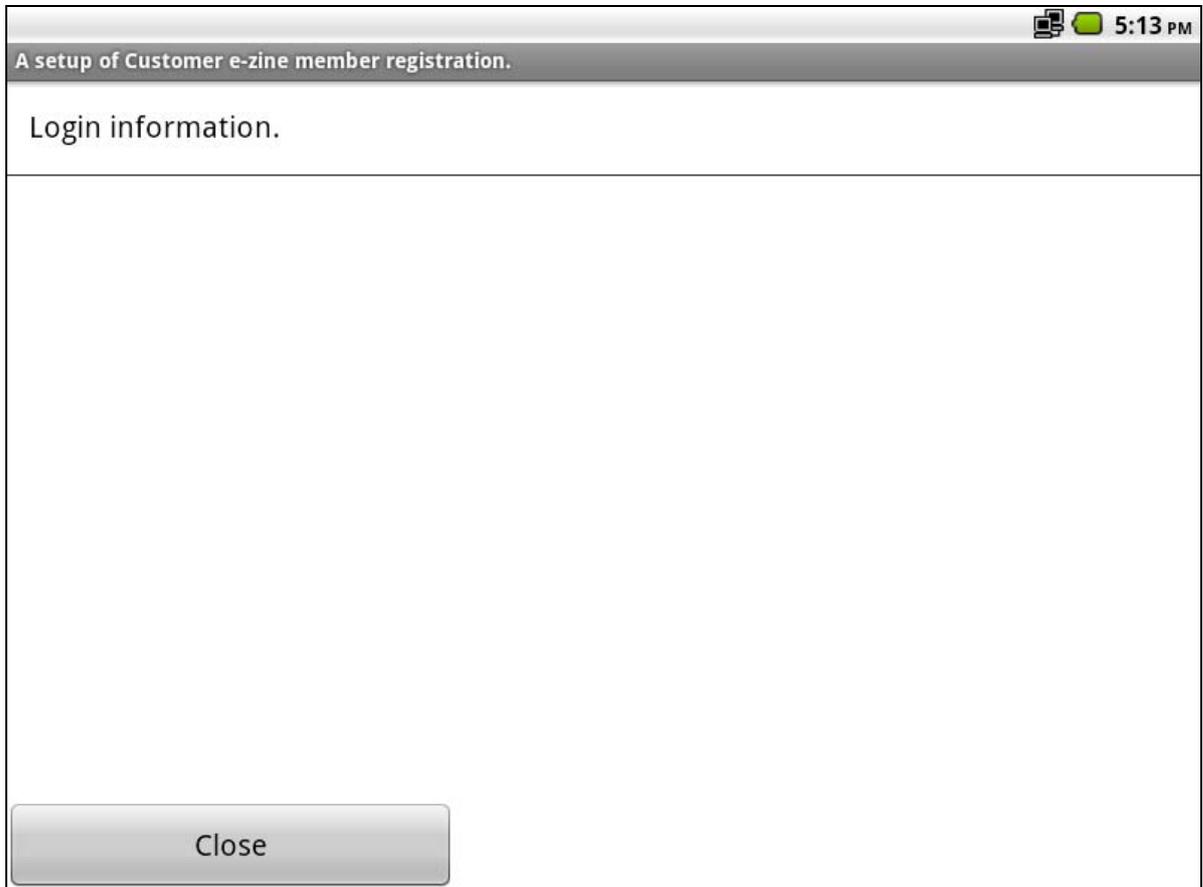
Save Cancellation.

Tap <Time >, Enter Time to send to Customer.



2.3.5.6. E-Mail Magazine Subscription

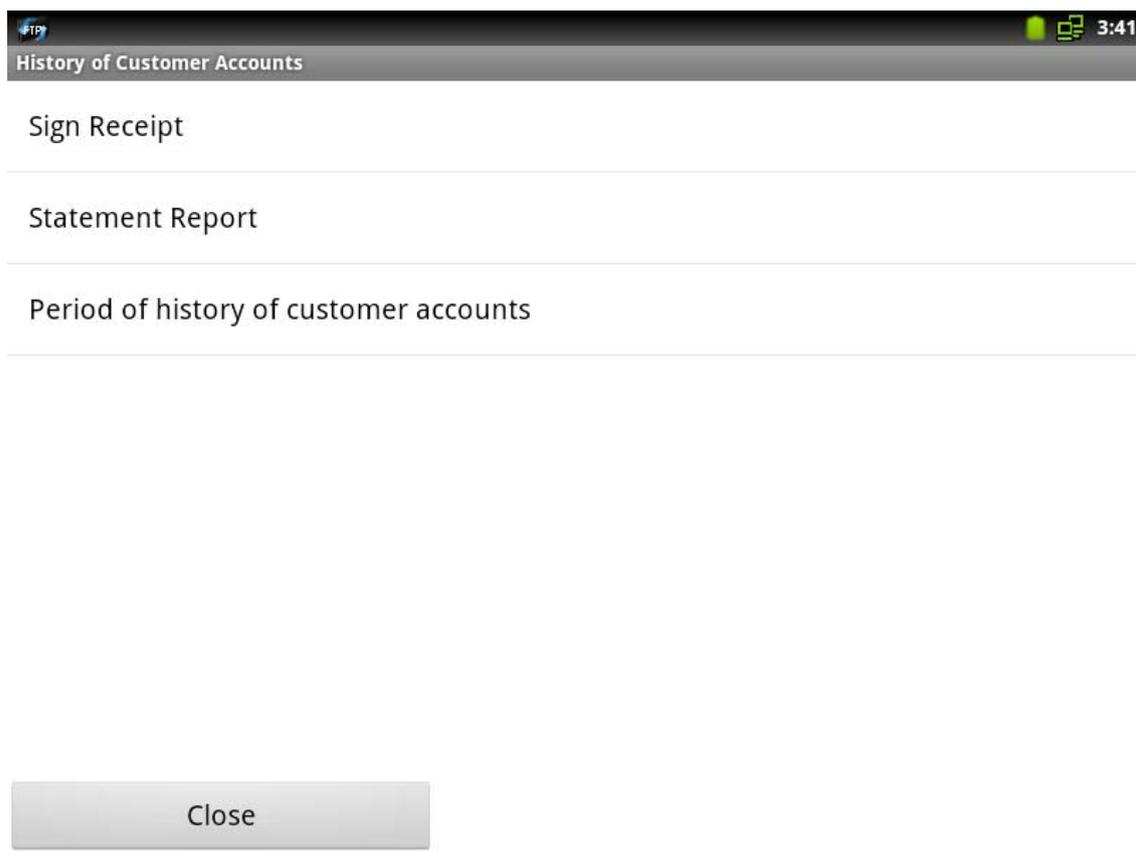
- Setting for E-Mail Magazine Subscription Information for CXD NEXT
- Available just for CXD NEXT in Japan.



Tap <Login Information >, Enter User code and Password.

The screenshot shows a mobile application interface. At the top, there is a status bar with a battery icon, a signal strength icon, and the time 5:14 PM. Below the status bar, a dark grey header contains the text "A setup of Customer e-zine member registration." and "Login informat". A modal dialog box titled "Login information." is centered on the screen. It has a dark grey header with a white arrow icon pointing down. The dialog contains two input fields: "User code." and "Password.". The "User code." field is highlighted with an orange border. At the bottom of the dialog, there are two buttons: "Save" and "Cancellation.". In the background, a "Close" button is visible at the bottom left.

2.3.5.7. History of customer accounts



- Sign Receipt

Title	
Print sign receipt	Select print or not print out sign receipt.

- Statement Report

Title	
A graphic logo is printed.	Print or not print the graphic logo on the statement.
Print receipt top message 1.	Print or not print the receipt top message1.
Print receipt top message 2.	Print or not print the receipt top message2.

- Period of history of customer accounts

Title	
Past [] months	Set period of history of customer accounts.
Show all.	tick: you can see all of history. un-tick: conform the above setting.

If you use the function "Show all", the performance of functions may be deteriorated. For example of functions, "payment charge" and "history of customer accounts".

So we do not recommend using "Show all".

2.3.6. Protection

Protection: Set Administrator password, Set User password and limitation.

Customer Settings 4/9/12 5:14 PM

Item List RFM Function. Protecti... Set

An administrator's setup

Administrator password

Check input

A user's setup

The use of those other than an administrator is permitted.

User password

Check input

Printing is permitted.

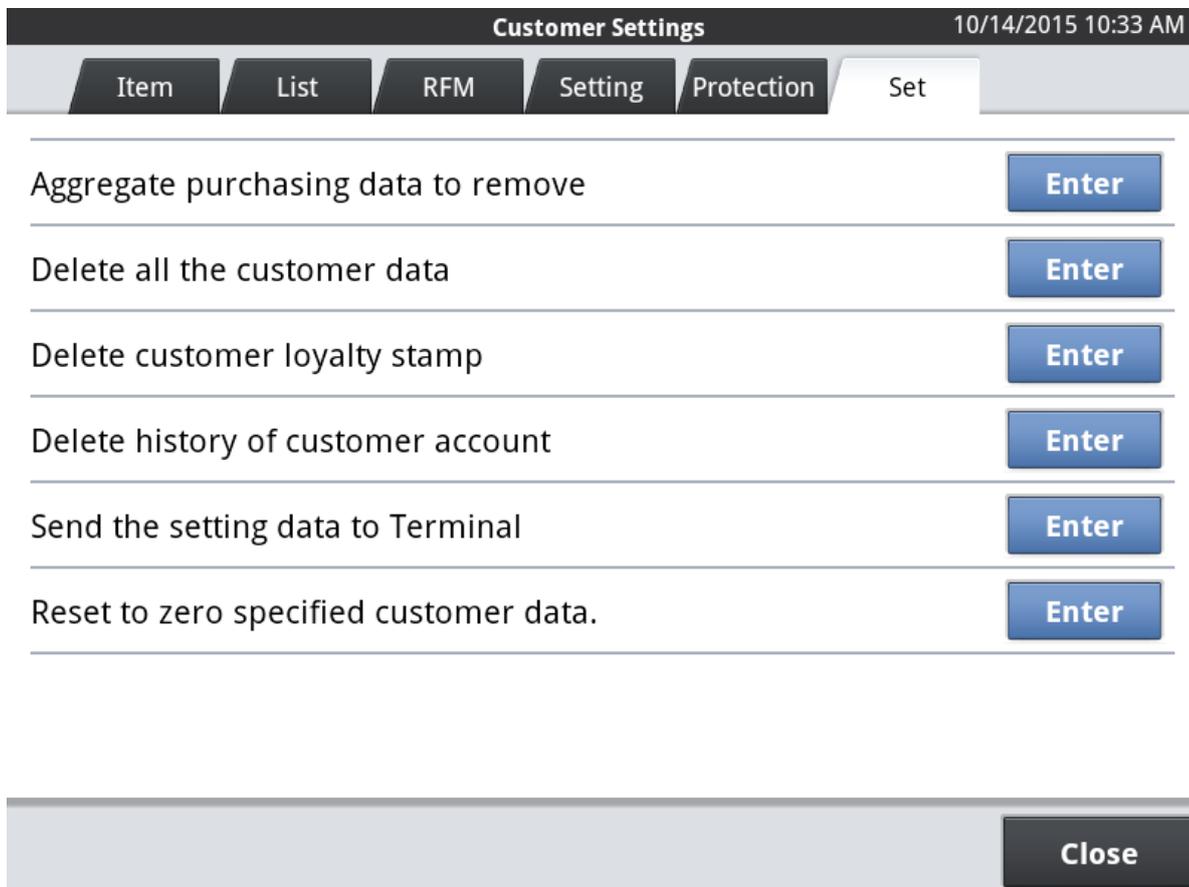
Transmission is permitted.

Edit Close

Protection: Set Administrator password, Set User password and limitation.

2.3.7. Data Deletion

The purchase total data of a register is deleted. All customer data is deleted.



- Tap the <Enter> button if you wish to delete reservation information for entire data or for a specific date onward. To confirm deletion, a confirmation dialog will appear to select desired key.
- To cancel delete operation, tap <Close> button.

1	Aggregate purchasing data to remove	Delete purchasing data of all customers.
2	Delete all the customer data	Delete all of customer data.
3	Delete customer loyalty stamp	Delete loyalty stamp data of all customers.
4	Delete history of customer account	Delete history of customer account. [Delete all] Delete all of customer account data. [Delete details of balance zero] Delete data of customer whose balance is zero.
5	Send the setting data to Terminal	Send setting data of customer management system to other terminal.
6	Reset to zero specified customer data	Delete data of specified customer except for customer basic information. [Delete data] <ul style="list-style-type: none"> • customer purchase history • customer loyalty stamp • customer balance and history of account

3. Link with Sales Management System

3.1. Customer Accounts

This function manages the amount of customer charge.

3.1.1. Settings

This function uses deposit key to receive payment of customer charge.

set key	value
Func Code	000025
Descriptor	DEPOSIT
Deposit minus	Charge Payment
Media definition	Charge

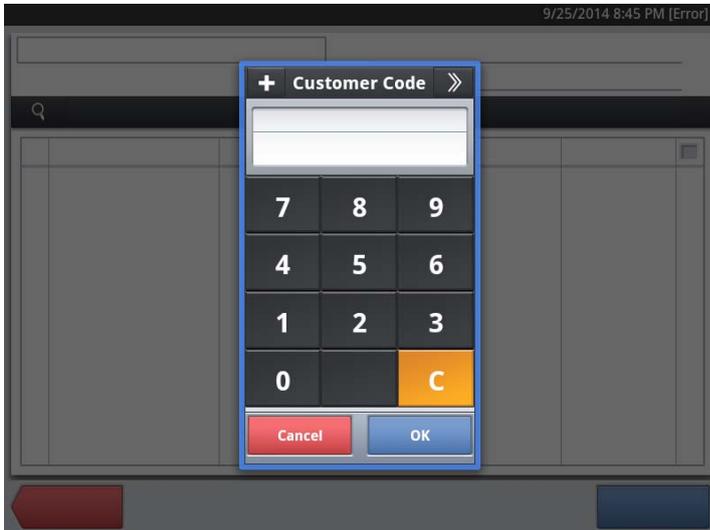
- Refer [Sales Management System Sales management Programming and Reference Manual], you can get more information of setting.

3.1.2. Customer charge

- Set customer on registration screen by <CUST#> button, and register items with normally operation.
- Tap <charge> button to finalize transaction as customer charge.

3.1.3. Receive payment of customer charge

- Tap <deposit> button programmed above.
- At first, select customer.



- If the customer is already selected on the sales registration screen, it is not need to select customer again.
- After select customer, History of Customer Accounts will appear on the screen.

SYSTEM History of Customer Accounts 9/25/2014 8:43 PM [Error]

Mr/Ms Customer #1 Charge total amount (\$66.15)

Q All 2 Result

	DATE▲	CONSECUTIVE NUMBER	TYPE	Amount
+	9/25/2014 20:41	000002	Charge	(\$37.80)
+	9/25/2014 20:42	000003	Charge	(\$28.35)

Back Payment

- Tap <Payment>, Dialog of input amount will appear to input amount of payment.
- After input the amount of payment, tap <OK> on the dialog.
- Register to sales management system as payment of customer charge.
- After register it, the operation of finalize transaction is same as normally one.

3.1.4. Check the current balance of customer charge

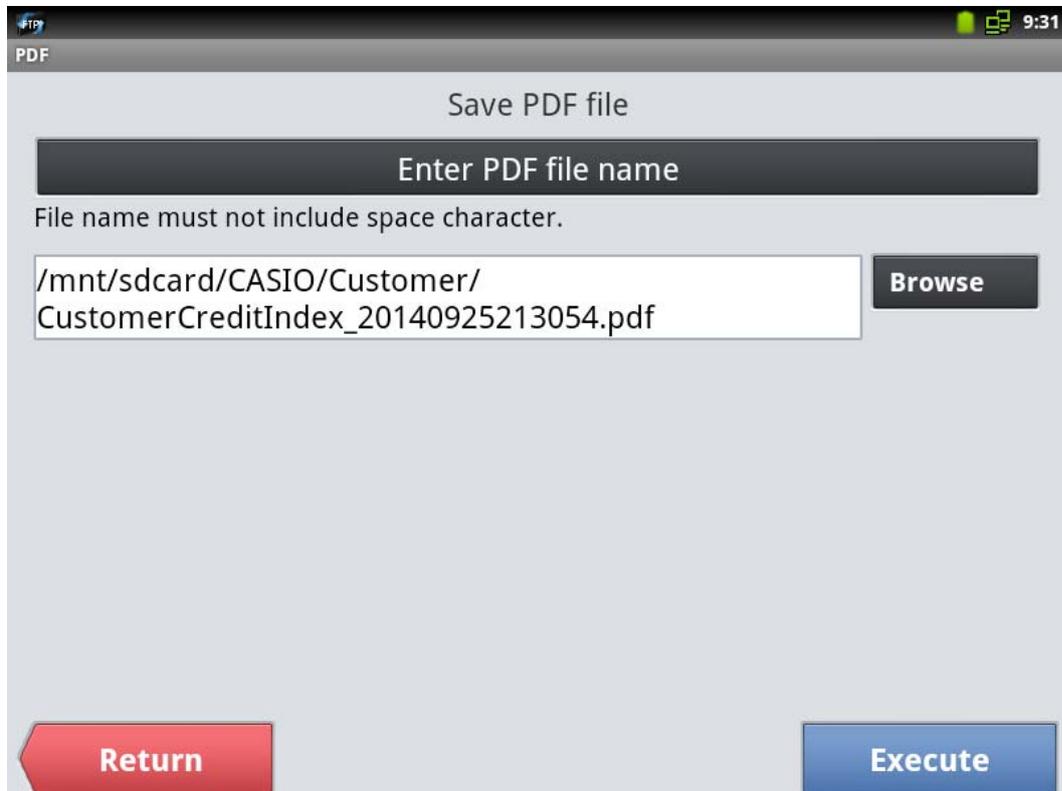
Refer the page [History of Customer Accounts] in this manual.

3.1.5. Cancel customer charge

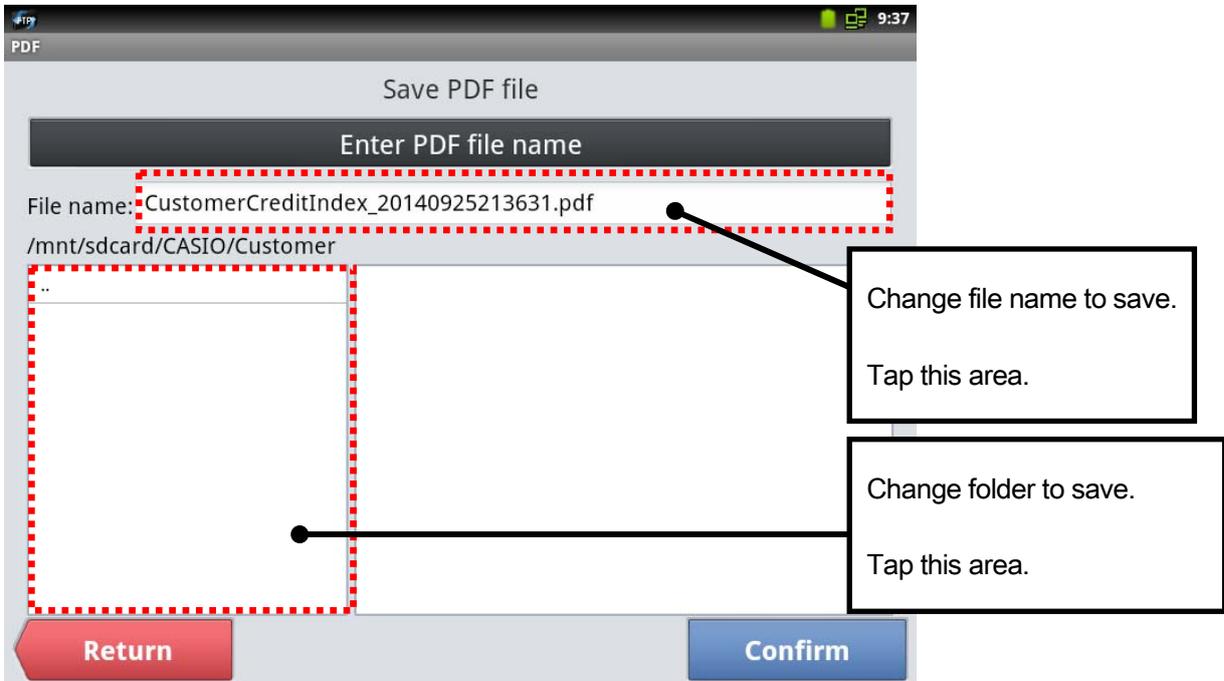
- Cancel customer charge by normally operation of sales registration in Reg Minus mode.
- Refer [Sales Management System Sales management Programming and Reference Manual], you can get more information.
- The amount of customer charge is re-calculated by using the amount canceled.

4. Others

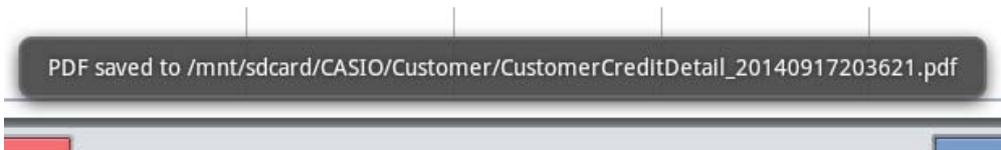
4.1. Output PDF



- Tap <Save xxx pdf xxx> button in each functions, it will appear the screen like the above.
- Tap <Execute> to save file to folder displayed on the screen.
- Tap <Browse> to change folder and file name.
- Tap <Return> to cancel this process.
- Change folder and file name to save



- Tap <Confirm> to return with information edited on this screen.
- Tap <Return> to cancel this process.
- If Output PDF is success, the following pop-up will appear.



- If Output PDF is failed, the following pop-up will appear.



- There will be the following causes.

Causes	Solution
SD is not insert to your machine, but you set save area to SD.	Insert and mount SD.
There are not enough empty area to save PDF.	Delete unnecessary data.

4.1.1. Save location

Default locations of saving PDF are the following.

V-R7000

Functions	default path (1 st time after install)
Reservation Note	/strage/emulated/0/CASIO/Reservation
Reserved Items	/strage/emulated/0/CASIO/Reservation
Purchase History	/strage/emulated/0/CASIO/Reservation
History of Customer Accounts	/strage/emulated/0/CASIO/Customer
Reservation Table	/strage/emulated/0/CASIO/Reservation

VX-100

Functions	default path (1 st time after install)
Reservation Note	/mnt/sdcard/CASIO/Reservation
Reserved Items	/mnt/sdcard/CASIO/Reservation
Purchase History	/mnt/sdcard/CASIO/Reservation
History of Customer Accounts	/mnt/sdcard/CASIO/Customer
Reservation Table	/mnt/sdcard/CASIO/Reservation

After 2nd time, save location is same as previous one.

4.1.2. Others

We checked to read PDF file on the below environment.

OS : Windows7 SP1

PDF Reader : Adobe® Reader® XI 11.0.08

CASIO®

V-REGI-REF-E

CA1510-A

Sales management

Customer File Reference Manual