

## Cumulative billing / payment search

Users can search for members using their **cumulative billing amount** and **cumulative payment amount** as criteria. They can search for members who have relatively high or low spending amounts.

*HKB2B User experience system 11  
Ivy Lee (beauty) in operations*

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- Apply own leave
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Go to Member > Member record.

Member

Page Menu

Member record

Search New Config Details Display Statistics

Advanced Member Account Active / Inactive Transaction Search Cumulative Billing/Payment Expiry Date

Member basic search

Join shop: All, CVB, MK

Member group: All, New Member, VIP Silver, VIP Gold, VIP Platinum, Group Buying  
 \*\*\*Select [ All ], deleted member will not be displayed at search results. please select [ deleted ] to search deleted members

Member code:

Name:

Identity card:

Gender: All

Birth month: All

Age group: All

Telephone:  Have mobile telephone  No mobile telephone

Address:  valid address only

Email:  Have email  No email

Member discount:  %

Join date: -- / -- / To -- / -- / Quick select

Consultant: All All All

Therapist: All All All

Click <Cumulative Billing / Payment >.

Member

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Member record

Search New Config Details Display Statistics

Basic Advanced Member Account Active / Inactive Transaction Search Expiry Date

By cumulative billing / payment amount search member

Member join shop: All, CWB, MK

Member group: All, New Member, VIP Silver, VIP Gold, VIP Platinum, Group Buying

Cumulative billing amount: >= 50000

Cumulative payment amount: >= 50000

Invoice date: From 1 Nov 2017 to 30 Nov 2018 Last month

Default consultant: All, CWB, MK, Sales, Sales Manager, Sales Trainee; Amy (S007), Anna (S004), cobi ng (MK001), Gary (S002), Ivy Lee (beauty)

Include or exclude item: Include item

Promotion include or exclude:  Unspecified,  Include promotion,  Exclude promotion

Analysis code: All, ANA2, Refer, Unspecified

Submit Reset

Select member information, e.g. shop and member group.

Input cumulative billing amount and payment amount.

Select invoice date to indicate the spending period.

Select the default consultant of the member.

Select items to exclude / include in the search.  
Purchases triggered by the item will be shown.

Select promotions and analysis codes to exclude / include in the search. Purchases triggered by the promotion / code will be shown.

Click <Submit> to see the search results.

Member

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Search New Config Details Display Statistics

Members with the chosen criteria will be shown.

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Member cumulative billing/ payment search results

Member code	Member name	Join shop	Telephone	Email	Member group	Cumulative billing	Cumulative payment	Cumulative deposit payment
T2	Testing	CWB	98746259		VIP Platinum	\$ 207,000.00	\$ 207,000.00	\$ 0.00
WeM-00010	Sandy Lam	CWB	92929292		New Member	\$ 65,250.00	\$ 58,250.00	\$ 0.00
WeM-00027	Carmen Cheung	CWB	92233445		VIP Platinum	\$ 71,936.00	\$ 67,936.00	\$ 0.00
WeM-00033HK	Wong Shirley	CWB	92223333		New Member	\$ 63,643.00	\$ 55,643.00	\$ 0.00
						\$ 407,829.00	\$ 388,829.00	\$ 0.00

Click on the member name to view her invoice.

Information such as cumulative billing, cumulative payment and cumulative deposit payment will be shown.

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Search New Config Details Display Statistics

7 invoice count

Sandy Lam (WeM-00010) invoice list

Invoice no	Invoice date	Invoice type	Promotion code	Billing amount	Payment amount	Deposit payment amount
PSI-00119	26-Feb-2018	Sales		\$ 2,250.00	\$ 2,250.00	\$ 0.00
PSI-00118	28-Feb-2018	Sales		\$ 35,000.00	\$ 35,000.00	\$ 0.00
PSI-00120	1-Mar-2018	Sales		\$ 0.00	\$ 0.00	\$ 0.00
PSI-00121	1-Mar-2018	Sales		\$ 12,000.00	\$ 12,000.00	\$ 0.00
PSI-00122	1-Mar-2018	Sales		\$ 6,000.00	\$ 6,000.00	\$ 0.00
PSI-00123	1-Mar-2018	Sales		\$ 10,000.00	\$ 1,000.00	\$ 0.00
PSM-00023	1-Mar-2018	Settlement		\$ 0.00	\$ 2,000.00	\$ 0.00
			Total amount	\$ 65,250.00	\$ 58,250.00	\$ 0.00

Click the Invoice no. to view the invoice.

Invoice no : [PSI-00123 \(Unpaid\)](#) [ Cash closing : 11 ]  
 Ref Inv No : [Nil](#)  
 Sales : Ivy Lee (beauty)  
 Shop : [CWB](#)

Date : 1-Mar-2018  
 Prepared by : Ivy Lee (beauty)  
 Created at : 1-Mar-2018 10:23  
 Last updated at : 1-Mar-2018 10:23 / Ivy Lee (beauty)

Code	Name	Quantity	Unit Price	Gross amount	Discount	Total amount
ET02	Eye Treatment B	10	\$ 1,000.00	\$ 10,000.00		\$ 10,000.00
Expiry date : <a href="#">1-Mar-2021</a> Promotion code : Nil Analysis code : <a href="#">Nil</a> Sales : <a href="#">Ivy Lee (beauty)</a> Therapist : <a href="#">Nil</a> CS : <a href="#">Nil</a> Manager : <a href="#">Nil</a>						
Item remark : <a href="#">Nil</a>						

Member : Sandy Lam (WeM-00010) Subtotal : \$ 10,000.00  
 Total amount : \$ 10,000.00  
 Payment method :  
[Edit](#) Visa : \$ 1,000.00  
 Paid amount : \$ 1,000.00

Remark :

Installment :

	Amount	Due date
1	\$ 9,000.00	1-Apr-2018
<b>Total :</b>	<b>\$ 9,000.00</b>	

Settlement :

	Amount	Settlement date	Settlement invoice
1	\$ 2,000.00	1-Mar-2018	PSM-00023
<b>Outstanding :</b>	<b>\$ 7,000.00</b>		

If one of the following, include/exclude item, promotion or analysis code, is selected in the search criteria,

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9 invoice item count

Sandy Lam (WeM-00010) invoice item list

Invoice no	Invoice date	Item code	Item name	Item type	Quantity	Unit Price	Item billing amount	Item payment amount	Item promotion code	Item analysis code
PSI-00119	26-Feb-2018	T01	透明質酸強效保濕療程 - 面部	Treatment	1	\$ 2,250.00	\$ 2,250.00	\$ 2,250.00		
PSI-00118	28-Feb-2018	ET01	Eye Treatment A	Treatment	10	\$ 1,000.00	\$ 10,000.00	\$ 10,000.00		
PSI-00118	28-Feb-2018	BU100	BU100	Beauty unit	50	\$ 100.00	\$ 5,000.00	\$ 5,000.00		
PSI-00118	28-Feb-2018	D05	D30000/20000	Deposit	1	\$ 30,000.00	\$ 20,000.00	\$ 20,000.00		
PSI-00120	1-Mar-2018	T02	抗衰老細胞再生療程 - 面部	Treatment	1	\$ 0.00	\$ 0.00	\$ 0.00		
PSI-00121	1-Mar-2018	M012	全年激光脫毛療程	Membership	1	\$ 12,000.00	\$ 12,000.00	\$ 12,000.00		
PSI-00122	1-Mar-2018	M006	Flexi membership	Membership	1	\$ 6,000.00	\$ 6,000.00	\$ 6,000.00		
PSI-00123	1-Mar-2018	ET02	Eye Treatment B	Treatment	10	\$ 1,000.00	\$ 10,000.00	\$ 1,000.00		
PSM-00023	1-Mar-2018		Settlement PSI-00123				\$ 0.00	\$ 2,000.00		
<b>Total amount</b>							<b>\$ 65,250.00</b>	<b>\$ 58,250.00</b>		

The details in each invoice of the selected member will be shown.