Auto Upgrade by Spending

Salespersons like to differentiate customers into different grades according to their spending so as to implement different strategies for different customer grades.   If customers are assigned into a wrong grade, it will impact the effectiveness of the strategy.

With the function of auto upgrade by spending, company can closely follow the customers' spending behavior, collect accurate information and implement the strategy in the most effective way.

After the auto upgrade rules setup is completed, members who meet the requirement will be automatically upgraded immediate after the invoice is issued.   Company can also set up the notification for colleagues to confirm or skip the member upgrade after invoice is issued.

If the invoice is edited or void which cause the spending amount reduced to a level that fails to meet the requirement, the member will be revert to the original member group.

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Setup Auto Upgrade

Member > Setup > Member auto upgrade/ downgrade setup (Setup $)

New member auto upgrade setup	
Original member group	Regular
Member spending	From >= $ 5000 to < $ 10000
New member group	Bronze Level VIP
Calculate spending method	○ Individual invoice spending ● Accumulated spending ○ Same day spending
Calculate spending start date	4 / May / 2018 or First invoice date (after start date)
Calculate spending period	3 month
Calculate amount method	● Billing ○ Collection

Submit   Reset   Close

- **Original member group/ New member group**: Select the original member group and the member group to be upgraded.

- **Member spending**: Enter the amount of member spending as the requirement.

- **Calculate spending method include**

  ➢ Individual invoice spending: calculate member spending for one single invoice.

  ➢ Accumulated spending: calculate member spending start from "Calculate spending start date".

  ➢ Same day spending: calculate member spending for one single day.

- **Calculate spending start date:** Invoice after this date will be used to calculate the spending checking.

- **Calculate amount method:** calculate spending amount on invoice amount (billing) or payment amount (collection).

Created requirement can be edited or deleted.

Member auto upgrade setup							
Original member group	Member spending	New member group	Calculate spending method	Calculate spending start date	Calculate spending period	Calculate amount method	
Silver Level VIP	From >= $200000 to < $500000	Golden Level VIP	Accumulated	4-May-2018	1 year	Collection	Edit / Delete
Bronze Level VIP	From >= $10000 to < $200000	Silver Level VIP	Accumulated	4-May-2018	1 year	Collection	Edit / Delete