


Contact Campaign

- Assign member to sales for contacting
- Record contact content and progress by sales
- Follow up and monitor the contact campaign status by management staff
- Create new booking for member by sales
- Implement analysis on campaign

Assign Member for Sales to Contact

Member > Member record > Search

Member basic search	
Join shop	<input type="text" value="All"/> TKO TST
Member group	<input type="text" value="All"/> Lv1 Lv2 Lv3 <small>***Select [All], deleted member will not be displayed at search results. please select [deleted] to search deleted members</small>
Member code	<input type="text"/>
Name	<input type="text"/>
Identity card	<input type="text"/>
Gender	<input type="text" value="All"/> <div style="border: 1px solid black; padding: 5px; display: inline-block;">Use member search to filter members</div>
Member in	<input type="text" value="All members"/> Member in any contact campaign Member not in any contact campaign Birthday promotion on June (Junebirth) Birthday promotion on May (Maybirth)
Member not in	<input type="text" value="All members"/> Member not in any contact campaign Member in any contact campaign Birthday promotion on June (Junebirth) Birthday promotion on May (Maybirth)
Campaign sales	<input type="text" value="Apple Yu (IS007)"/> Bell Lau (T) (D074) bunny (bunny) Cally Chan (T046) Cammi Hui (S) (D383) 
<input type="button" value="Submit"/> <input type="button" value="Reset"/>	

Member search results

Member code	Member name	Telephone	Email	Member group	Action
A001	Ms Lee Sally	11223344		Trial	<input type="checkbox"/> Remove from search results <input type="checkbox"/> Remove from search results
A002	Ms Wong Lily	22446688		Trial	<input type="checkbox"/> Remove from search results <input type="checkbox"/> Remove from search results
A003	Mr Chan Tai Man	11335577		Trial	<input type="checkbox"/> Remove from search results <input type="checkbox"/> Remove from search results

Press <[Contact campaign]: Assign member to sales> to add member to contact campaign.

Back | Change group | Change shop | Change consultant | Print label | **[Contact campaign] : Assign member to sales** | Close

Select contact campaign, press submit ---> and then at next page select sales

Birthday promotion on June (Junebirth) - Promotion code : AP, Analysis code : K11

[Submit](#) [Reset](#) [Close](#)

Select contact campaign and sales, members will be allocated to sales evenly.

Select sales for Birthday promotion on June (Junebirth) , Promotion code : AP, Analysis code : K11

Shop : TKO Total member count for allocation : 2 , average each sales can allocate 1 to 1 members

Apple Yu (IS007)	Candy Chan (IS003)	Holiday Tse (IS005)	Mary Lee (IS002)	Yuki Cheng (IS001)
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Record Contact Content and Progress by Sales

At Member > Contact member > List

According to access right, sales can view and update contact campaign and members that they are responsible for.

According to access right, management staff can follow up and monitor the progress of contact campaign.

Contact campaign	Campaign sales	Contact status	Arrange booking	Booking same day issue invoice	Attendance verification
All Birthday promotion on June (Junebirth), Promotion code : AP, Analysis code : K11 Birthday promotion on May (Maybirth), Promotion code : 6SCS1	All Apple Yu (IS007) Candy Chan (IS003)	All Pending Booked No answer Not interested	All Booked Not book	All Invoice amount > \$ 0 Product amount > \$ 0 Treatment amount > \$ 0 Invoice amount >= \$ 5,000 Product amount >= \$ 1,500 Treatment amount >= \$ 1,000 No invoice or invoice amount = \$ 0	All Verified Not verified

Member name, code and telephone keyword Only display have contact in / / 2020 to / / 2020

Select search criteria, then press <OK> to filter the contact member.

Press on the record to view or update contact member details.

Campaign	Member name	Member code	Telephone	Contact sales	Contact date time	Contact method	Contact status	Last remark	Contact content
Birthday promotion on June (Junebirth)	Chan Tai Man	A003	11335577	Candy Chan (IS003)	4-May-2020 07:32 pm	Phone	Booked	Free Trial	
Birthday promotion on June (Junebirth)	Lee Sally	A001	11223344	Apple Yu (IS007)			Pending		
Birthday promotion on June (Junebirth)	Wong Lily	A002	22446688	Apple Yu (IS007)			Pending		

Birthday promotion on June (Junebirth), Promotion code : AP, Analysis code : K11 Member : Lee Sally (A001) Telephone : 11223344 Status : Pending

Member remark :

4-May-2020 07:32 pm Birthday promotion on June (Junebirth) contact remark

Contact method : Phone Status : Booked

Contact remark : Free Trial

Contact content : Member has purchased treatment at before. Now want to have a free trial first.

Booking : TKO / 5-May-2020 03:30 pm Yuki Cheng (IS001) / Deep pore cleansing facial (AP03)

Last updated : HKB2B Support (beauty) 8-May-2020 03:52 pm

Can edit or delete created contact remarks.

New contact remark

Date : 2020 Time : :

Contact method : Status :

Contact remark (Maximum 500 characters) :

Contact content (Maximum 500 characters) :

Update latest contact status of member by create new contact remark, then press <Submit> to update record.

4-May-2020 07:32 pm Birthday promotion on June (Junebirth) contact remark

Contact method : Phone Status : Booked [Edit](#) [Delete](#)

Contact remark : Free Trial

Contact content : Member has purchased treatment at before. Now want to have a free trial first.

Booking : TKO / 5-May-2020 03:30 pm / Yuki Cheng (IS001) / Deep pore cleansing facial (AP03)

Last updated : HKB2B Support (beauty) 8-May-2020 03:52 pm

New contact remark

Date : 20 May 2020 Time : 10 : 03

Contact method : Phone Status : Pending

Contact remark (Maximum 500 characters):

[Select Remarks](#)

If booking is required, press <New booking> to create booking for contact member.



Select treatment for booking.
 If no specific treatment, input treatment duration to create

Lee Sally (A001) TKO 11223344 New booking [Comment](#) [My Account](#) [History](#) [Instalment](#) [Details](#)

Select treatment Facial Facial Treatment (T01) 60 minutes

or select equipment 8N (8N) 888ss (888SS) 60 minutes

or input treatment duration minutes

Select date 20 May 2020 to 20 May 2020 [Quick select](#)

Select time 09 : 00 To 23 : 30 Whole day (09:00-23:30) [Setup](#)

Prefer weekday **All** Sunday Monday Tuesday Wednesday Thursday Friday Saturday

Shop TKO

Therapist **All** Apple Yu (IS007) Candy Chan (IS003) Yuki Cheng (IS001)

[OK](#) [Reset](#) [Close](#)

System will display available timeslot. Select timeslot and therapist.

Select date, time, prefer weekday, shop and therapist, then press <OK> to display available

20-May-2020 (Wednesday) 10:00 - 11:00

20-May-2020 (Wednesday) 10:15 - 11:15

10-7 Apple Yu (IS007)

20-May-2020 (Wednesday) 10:30 - 11:30

20-May-2020 (Wednesday) 10:45 - 11:45

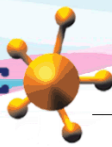
20-May-2020 (Wednesday) 11:00 - 12:00

Reconfirm booking details, press <Submit> to create booking.

Booking details

Member : Lee Sally (A001) Booking date : 20-May-2020 Booking time : 10:00 - 11:00 Shop : TKO Therapist : Apple Yu Treatment : Facial Treatment (T01)

[Submit](#) [Cancel](#)



The last updated contact information will be displayed on the contact member list.

Campaign	Member name	Member code	Telephone	Contact sales	Contact date time	Contact method	Contact status	Last remark	Contact content
Birthday promotion on June (Junebirth)	Chan Tai Man	A003	11335577	Candy Chan (IS003)	4-May-2020 07:32 pm	Phone	Booked	Free Trial	Member has purchased treatment at before. Now want to have a free trial first.

Contact member list will also display the booking details, attendance verification and purchased record of the day.

Booking details will display on member list, If booking created by contact member.

Staff with access right can verify member's attendance.

Member list								
Booking shop	Booking date time	Booking remark	Booking status	Attendance remark	Attendance verification	Verification staff	Verification date	Verification remark
TKO	5-May-2020 03:30 pm		Arrived		<input checked="" type="checkbox"/>	HKB2B Support (beauty)	5-May-2020 04:50 pm	

System will display member's same day purchased record.

Success purchase	Invoice date	Invoice no	Invoice amount	Purchase product	Product amount	Purchase treatment	Treatment amount	Purchase remark
N	5-May-2020	ISPSI-00726	\$ 2,900.00	Moisturizing cream (00011)	\$ 2,000.00	Deep pore cleansing facial (AP03)	\$ 900.00	

View and Update Member Contact Status at Booking Table

Booking > booking table > insert member code > Campaign

View member contact details from booking table, press <Edit> to view or update.

Campaign list for Mr Chan Tai Man (A003)						
Campaign	Status	Last remark	Date	Time	Sales	Action
Birthday promotion on June (Junebirth)	Booked	Free Trial	4-May-2020	07:32 pm	Candy Chan (IS003)	Edit
VIP member reward (VIPA)	Pending		4-May-2020	08:12 pm	Candy Chan (IS003)	Edit

Booking > Booking table > A Panel



When member arrive, authorized user can press <arrive + verification> for member at A Panel. Attendance verification and verification staff will be updated on contact member list.

Member code	Member name	Tel	Action	Booking time	Consultant	Therapist	Treatment	Equipment	Remark	Attendance remark	Verification remark	Purchase remark
A003	Chan Tai Man	11335577(M)	Arrive + Verification Cancel No Show	08:00 pm - 08:30 pm		Yuki Cheng (IS001)	Deep pore cleansing facial (AP03)		K11	Add	Add	Add

Staff can add booking remark, attendance remark and verification remark for member at A Panel or F Panel.

Booking > Booking table > F Panel



Member code	Member name	Tel	Action	Booking time	Arrived duration	Therapist	Treatment	Equipment	Room	Remark	Attendance remark	Verification remark	Purchase remark
A003	Chan Tai Man	11335577(M)	Finish	8-May-2020 08:00 pm	5 Min 25	Yuki Cheng (IS001)	Deep pore cleansing facial (AP03)			K11	Add	Add	Add

Report - Contact Campaign Analysis

Member > Report > Contact campaign analysis

Contact campaign analysis can sort by campaign, shop, sales and member. It analyze contact status of contact campaign according to members count.

Member report	
Contact campaign analysis by campaign	
Contact campaign analysis by shop	
Contact campaign analysis by sales	
Contact campaign analysis by member	

Contact campaign analysis by shop	
Shop	<input type="button" value="All"/> <input type="button" value="CWB"/> <input type="button" value="TST"/>
Campaign	<input type="button" value="All"/>
Sales group	<input type="button" value="All"/> <input type="button" value="Sales"/> <input type="button" value="Sales Manager"/>
Sales	<input type="button" value="All"/> <input type="button" value="Anna (S004)"/> <input type="button" value="cobi ng (MK001)"/> <input type="button" value="Gary (S002)"/>
Member group	<input type="button" value="All"/> <input type="button" value="VIP Silver"/> <input type="button" value="VIP Gold"/> <input type="button" value="VIP Platinum"/>

Contact campaign analysis by campaign

Prepared by : beauty

Page : 1 / 1

Shop : All Campaign : Junebirth,Maybirth Sales group : All
 Sales : All Member group : All

Campaign code	Campaign name	Not interested count	Not interested rate	No answer count	No answer rate	Booked count	Booked rate	Pending count	Pending rate	Total count	Total rate
Junebirth	Birthday promotion on June	0	0.00%	0	0.00%	1	33.33%	2	66.67%	3	100.00%
Maybirth	Birthday promotion on May	0	0.00%	0	0.00%	0	0.00%	3	100.00%	3	100.00%
Grand Total		0	0.00%	0	0.00%	1	16.67%	5	83.33%	6	100.00%

Back | **Print** | Excel

Report can be printed and exported to Excel.

Contact Campaign Setup

Member > Contact campaign > List

Contact campaign list					
Code	Name	Promotion code	Analysis code	Campaign member count	Action
Maybirth	Birthday promotion on May	6SCS1		73	Edit
VIP	VIP member reward	AP	K11	10	Edit
Roadshow	Pop-up store promotion			60	Edit

Select promotion that this contact campaign can be used on create booking.
Promotion code will show on the booking created from contact campaign.
User can also use the promotion code and analysis code to conduct sales analysis.

New contact campaign

Code: (Maximum 50 characters)

Name: (Maximum 100 characters)

Details:

Promotion code (Analysis code, if any): Please select

Trial booking analysis require select promotion code with analysis code, can date back input analysis code to promotion code

Input contact campaign detail, press <Submit> to create campaign.



Promotion Code Setup

Master > Promotion > New

New promotion

Promotion code: (Must input, Maximum 20 characters. Please avoid input ', !, @, \$, #, %, ^, &, *, space.)

Promotion name: (Must input, Maximum 100 characters)

SKU: (Maximum 3 characters)

Promotion conditions :

Club: All, CMCWB, CMTST, CTL, CTL2

Member group: All, SVIP 09, Duplicate, New, SMS EMAIL TEST

Member interest group: All, Interest Group 2, Interest Group 3, Interest Group1

Member birthdate: month before or month after on birth month

Purchase item default:

Promotion period:

Status:

Trial count limitation: Every member can enjoy this promotion times / any time

Marketing promotion: Yes

Minimum purchase amount: Item amount >= \$

When all conditions matched, user can select promotion code at cashier, and then member can enjoy following discount :

Discount type: Invoice discount Item discount Fixed price \$ (Must input)

Promotion prepaid item default expiry date: Day

Other impact when use this promotion code :

Analysis code: Unspecified

(When use this promotion code will auto select analysis code)

Tick "Marketing promotion" to allow select this promotion code at contact campaign.

Contact Campaign Status Setup

Member > Contact campaign > Status

1st status will be the default contact campaign status.

Contact campaign status list		
	Name	Action
1	Pending	Edit
2	Booked	Edit
3	No answer	Edit
4	Not interested	Edit

New contact campaign status	
Name	<input type="text"/> (Maximum 100 characters)

[Submit](#) [Reset](#)

Enter contact campaign status, press <Submit> to create status.

Contact Campaign Contact Method Setup

Member > Contact campaign > Method

Contact campaign contact method list		
	Name	Action
1	Phone	Edit
2	Email	Edit
3	SMS	Edit

New contact campaign contact method	
Name	<input type="text"/> (Maximum 100 characters)

[Submit](#) [Reset](#)

Enter contact campaign contact method, press <Submit> to create method.

Contact Campaign Remark Setup

Member > Contact member > Remark

Contact member remark list	
Remark	Action
Free Trial	Edit Delete
Member change booking time	Edit Delete
Staff Relatives	Edit Delete

New contact member remark	
Remark	<input type="text"/>

[Submit](#) [Reset](#)

Enter contact campaign remark, press <Submit> to create remark.



Contact Member Display Setup

Member > Contact member > Setup

Contact member setup	
Display member remark	<input checked="" type="checkbox"/> Display
Display member comment	<input checked="" type="checkbox"/> Display
At contact member, allow booking	<input checked="" type="checkbox"/> Allow
Enable member attendance verification	<input checked="" type="checkbox"/> Enable
Display member purchase product information	<input checked="" type="checkbox"/> Display
Display member purchase treatment information	<input checked="" type="checkbox"/> Display
Display member purchase invoice information	<input checked="" type="checkbox"/> Display

Select fields and information to display on contact member list.

Setup only display member whose spending is over the set amount when filtering members at contact member list.

Contact member amount definition	
Setup invoice amount as filter criteria	<input type="text" value="5000"/>
Setup product amount as filter criteria	<input type="text" value="1500"/>
Setup treatment amount as filter criteria	<input type="text" value="1000"/>

Contact campaign	Campaign sales	Contact status	Arrange booking	Booking same day issue invoice	Attendance verification
All Birthday promotion on June (Junebirth), Promotion code : AP, Analysis code : K11 Birthday promotion on May (Maybirth), Promotion code : 6SCS1	All Apple Yu (IS007) Candy Chan (IS003)	All Pending Booked No answer Not interested	All Booked Not book	All Invoice amount > \$ 0 Product amount > \$ 0 Treatment amount > \$ 0 Invoice amount >= \$ 5,000 Product amount >= \$ 1,500 Treatment amount >= \$ 1,000 No invoice or invoice amount = \$ 0	All Verified Not verified

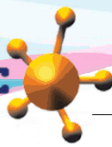
Member name, code and telephone keyword Only display have contact in 8 / May / 2020 to 8 / May / 2020

Success purchase	
Enable success purchase calculation	<input checked="" type="checkbox"/> Enable
Success purchase definition	Booking same day treatment amount >= \$ 1,000

Once enable success purchase calculation, system will define member purchase success or not according to success purchase

Display Y if success; Display N if fail.

Success purchase	Invoice date	Invoice no	Invoice amount	Purchase product	Product amount	Purchase treatment	Treatment amount	Purchase remark
N	5-May-2020	ISPSI-00726	\$ 2,900.00	Moisturizing cream (00011)	\$ 2,000.00	Deep pore cleansing facial (AP03)	\$ 900.00	<input type="button" value="Add"/>



Contact Campaign Memembr Rights Setup

Staff > Staff > Search and select staff > Contact campaign memembr rights

Staff can view selected sales' member at contact campaign.

Yuki Cheng (IS001) Contact campaign member rights

Campaign member rights :

- View own members
- Own club following staff member**
- Other club following staff member
- View all members

Select All UnSelect All

Apple Yu (IS007)	Candy Chan (IS003)	Holiday Tse (IS005)	Mary Lee (IS002)	Yuki Cheng (IS001)
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Press <Submit> to update.

 Submit  Reset  Cancel