

Manual Upgrade by spending

Salespersons like to differentiate customers into different levels according to their spending so as to implement different strategies for different customer groups.

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Users can manually upgrade the groups for member according to their spending in the system.

Set Up Member Cumulative Spending

Member > Member Record > Details > Member Cumulative Spending

Mei	mber record Search	New Config Details	Display		1.Press <setup>.</setup>			
	Member cumula	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-201 Last update date : 31-Aug-2018 10:48 am						
	Member cumulative spending	Spending an	nount	M	lember count Clear			
l	Unspecified					3911		
		-	fotal member count			3911		
**	** After edit setup, please press update							
			2.Select	calculate spending	use and			
			enter th	e invoice date for th	e calculation of sner	nding		

	enter the involce date for the calculation of spending.					
Member cumulative spending setup						
alculate spending use	O Invoice amount Payment amount					
voice date	1 V / Jun V / 2017 to 30 V / Jun V / 2018 Quick select V					
Submit 💭 Reset 🛛 Cancel						

3.Press <Submit> to finish member cumulative spending setup.



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Add New Member Cumulative Spending Group

Member record	Search	New Config Details Display						
	Member cumulativ	e spending Use payment a	amount to calcul	ate spending, invoice from 1-Jun-2017 to 30-Jun-2018				
Member cumulative	spending	Spending amount		Member count Clear				
Unspecified				3911				
		Total member coun	t	3911				
** After edit setup, please press update								
Back New I.Press <n< td=""><td>ew>.</td><td></td><td></td><td>Close</td></n<>	ew>.			Close				
Member record Search	ember record Search New Config Details Display							
	1	New member cumulative spendir	g					
Member cumulative spending	1-\$10,000	(Maximum 50) characters)					
Spending amount	=\$ <mark>1</mark> and <\$10000	2.	Set approp	riate member cumulative spending				
3 Pross < Submits to	a add the group		and spendin	ng amount.				
5.11C33 <50511112 (
Mer	Member cumulative spending Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018							
Member cumulative spending	9	Spending amount		Member count Clear				
\$1-\$10,000	>= \$1及 < \$	\$10000		0				
Unspecified				3911				
		Tota	al member count	3911				

** After edit setup, please press update

User should set a group of zero spending amount to represent those members who only consume free items during that period.

Member comulative spending		Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018			
Member cumulative spending		Spending amount	Member count Clear		
\$0	>= \$0及 < \$1		0		
\$1-\$10,000	>= \$1及 < \$10000		0		
\$10,000-\$30,000	>= \$10000及 < \$30000		0		
\$30,000-\$50,000	>= \$30000及 < \$50000		0		
\$50,000-\$80,000	>= \$50000及 < \$80000		0		
\$80,000-\$100,000	>= \$80000及 < \$100000		0		
\$100,000-\$200,000	>=\$100000及 < \$200000		0		
\$200,000-\$500,000	>= \$200000及 < \$500000		0		
Unspecified			3911		
		Total member count	3911		

** After edit setup, please press update



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Update Member Cumulative Spending Group

After the setup is completed, press <Update>. The system will assign the members to the appropriate groups according to their spending.

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Member cumula	tive spending	Use payment amount to calculat Last update date : 11-Sep-2018 (te spending, invoice from 1-Jun-2017 to 30-Jun-2018 02:54 pm
Member cumulative spending		Spending amount	Member count Clear
\$0	>= \$0及 < \$1		236
\$1-\$10,000	>= \$1及 < \$10000		1862
\$10,000-\$30,000	>= \$10000及 < \$30000		898
\$30,000-\$50,000	>= \$30000及 < \$50000		413
\$50,000-\$80,000	>= \$50000及 < \$80000		248
\$80,000-\$100,000	>= \$80000及 < \$100000		77
\$100,000-\$200,000	>=\$100000及 < \$200000		119
\$200,000-\$500,000	>= \$200000及 < \$500000		32
Unspecified			26
•		Total member count	3911

** After edit setup, please press update

The system automatically generates an "unspecified" group to identify those members who did not purchase any items during that period.

Reset Member Cumulative Spending Groups

1.Press <clear> to move all members to unspecified group.</clear>				
Member cumula	tive spending	Use payment amount to calculat	te spending, invoice from 1 Jun-2017 to 30-Jun-2	2018 Ipdate
Member cumulative spending		Spending amount	Member count Clear	
\$0	>= \$0及 < \$1		/	0
\$1-\$10,000	>= \$1及 < \$10000	2.Press the columns to e	edit or delete the groups.	0
\$10,000-\$30,000	>= \$10000及 < \$30000			0
\$30,000-\$50,000	>= \$30000及 < \$50000			0
\$50,000-\$80,000	>= \$50000及 < \$80000			0
\$80,000-\$100,000	>= \$80000及 < \$100000	3. After the reset is do	ne. press <update> so the system wi</update>	ill
\$100,000-\$200,000	>=\$100000及 < \$200000			••
\$200,000-\$500,000	>= \$200000及 < \$500000	assign the members to the appropriate groups of spe		
Unspecified			:	3911
Total member count				

** After edit setup, please press update



Search for Member Groups in Advanced Search

After the members are assigned to different groups, users can search for member groups in Advanced Search. Member > Member Record > Advanced

All Central MK All New Delete	0				
All Central MK All New Delete	0				
All New Delete	Ŷ				
Member code to or 🕰					
	Personal	Information			
All 🗸					
🗸 /	✓ / to	- •/ •/	Quick select 🗸		
Sirth month					
Age group All ≤= 18 19至 28					
Occupation					
All \$10,000-\$30,0 \$30,000-\$50,0	Selec	t appropriate r	member group as sear	rch criteria.	
Ievel All Master or above Secondary or below					
	Member search	results			
	- Member search			Action	
1ember name	Telephone	Email	Member group	Select All Undo	
	64985768		Silver Level VIP	Remove	
	96476473		Silver Level VIP	Remove	
	31894695		Silver Level VIP	Remove	
	All ✓ All ✓ All ✓ All ✓ All ✓ All ✓ All ✓ All ✓ All ✓ Slopools 30,0 Slopools 30,0 Slopools 30,0 All Master or abo Secondary or abo Secondary or abo	New Delete to to to Image: Secondary or below All Image: Secondary or below Member search Selection Image: Secondary or below Image: Secondary or below Image: Secondary or below Image: Secondary or below Image: Secondary or below Selection Image: Secondary or below Image: Secondary or below Image: Secondary or below Secondary Image: Secondary or Secondary Secondary Image: Secondary	New or to or to or Image: constraint of the second of the seco	New Delete to or Personal Information All All	

Back | Old SMS | New SMS | Change group | Multiple comment | Change shop | Change consultant | Change therapist | Print label | Member list | Excel member list | Print list | Excel list

Close

You can manually upgrade the groups for members if needed.

WeN 美容管理系統 Beauty Management System

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Display Member Cumulative Spending

Member > Member Record > Display

				Member field di	isplay		
		<u>Details</u>		New member			
Member field	Member record Select All	Booking / Invoice	Member record	Booking / Invoice Select All	Report Select All	Member application form	Member application form <u>PDF page break</u> Select All
Join shop Select All	V	V	✓	V	✓	V	
Member group Select All	✓		V	1	✓		
Member code Select All	\checkmark	v	V	V	\checkmark		
Full name Select All	\checkmark		✓	✓	\checkmark		
Last name Select All				✓		V	
First name Select All				✓			
English name Select All		✓		✓			
Chinese name	V	∀	V	V	∀	M	
Identity card Select All		7		2		2	
Gender Select All			Image: A start of the start	✓			
Birth date Select All	V	✓	\checkmark	V	\checkmark	V	
Age group Select All	✓		✓	v	✓		
Occupation Select All	V	✓	V	v	V	V	
Member cumulative spending	✓	✓	\checkmark	v	\checkmark		
Educational Level Select All	7			I	7		
Contact				<u> </u>			
Home telephone Select All	V						√
Office telephone Select All	✓						
Mobile telephone Select All	✓	1.Check the boxe	ed of iviem	ber cumulat	ive spending	to display so tha	τ
Pager Select All	V		++	former	بممما مممان		
Fax Select All		users can use	it to search	for member	rs and condu	ct analysis.	
Email Select All	V					_	
Home address Select All	V	V		✓			
Office address Select All		✓					
Country Select All		✓		▼		2	
country				4			
Membership							
Join date Select All		✓		✓		¥	✓
Discount rate Select All		✓					
Therapist Select All							
Drefer theranist Select All							
Prefer room Select All							
Last consultant Select All							
Receive Promotion Materials in				2			
Select All	•						
Referred by (Member) Select All							
Remark Select All				2			
從何認識我們? Select All	v	₹	 ✓ 	<	 ✓ 	 ✓ 	
Membertransation							
Accumulated other billed Select All							
Accumulated total billed Select All		v					
Installment outstanding amount							
Select All	<u> </u>	<u>_</u>					
Last sales date Select All		✓					
Last treatment date	¥.	V					
Input control	Fi	rst no control	Digits contro	pl			
		Format:(2,3)	Format:(2,3)	Must input		
Home telephone		2,5	8				
Office telephone		2,3	8				
Mobile telephone		9,6,8,5,	8				
Identity card							
			_				
]				
		Subn	nit	Reset			

2.Press 'Submit' to save the setting.



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Generate Member Record Report with Member Cummulative Spending

The column of member cummulative spending can be used in member record report as a filter.

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Member > Report > Member Record Report

Member record report							
Select all							
☐ Join shop	All Central MK						
Member group	All New Delete						
Member code	to or 🕰						
Name							
English name							
	Personal Information						
Identity card							
Gender							
Birth day	• / • / to • / • / Quick select •						
Birth month	All Jan Feb						
Age group	All <= 18 19至 28 ♥						
Occupation	All Executive Housewife						
Member cumulative spending	All \$10,000-\$30,000 \$30,000-\$50,000 Select appropriate spending group as the filter for member record report.						
level	All Master or above Secondary or below						



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Setup Member Report With Member Cumulative Spending

Users with a member report writer can use the member cumulative spending for report criteria and content. Member > Report > Config > New

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New member report setup							
Demonstration (Facility)		1					
Report name (English)		Maximu	m 200 characters				
Report name (中文)		Maximu	m 200 characters				
Allow use report user group	All user group A/C & HR Admin Admin - Inventory & Repo ALL Clerk Consultant	rting					
		Report	Report				
Member field		criteria	content				
Join snop (**Renew)							
Member group (**Renew)							
Member code							
Name							
Last name							
First name							
Chinese name							
Chinese name							
Personal info							
Identity card							
Gender (**Renew)							
Birth date							
Age group (**Renew)							
Occupation (**Renew)							
Member cumulative spending (**Rene	w)						
Educational Level (**Renew)							
Check the hoves to let member cumulative sponding							

be part of report criteria and content.