WeM 美容管理系統 ™ **Beauty Management System**

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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.

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

Member record   Search | New | Config | Details | Display

1.Press <Setup>.

Member cumulative spending	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018 Last update date : 31-Aug-2018 10:48 am Setup Update	
Member cumulative spending	Spending amount	Member count Clear
Unspecified		3911
	Total member count	3911

** After edit setup, please press update

2.Select calculate spending use and
enter the invoice date for the calculation of spending.

Member cumulative spending setup	
Calculate spending use	○ Invoice amount ● Payment amount
Invoice date	1 ∨ / Jun ∨ / 2017 to 30 ∨ / Jun ∨ / 2018 Quick select ∨

Submit   Reset   Cancel

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

Add New Member Cumulative Spending Group

Member record   Search | New | Config | Details | Display

Member cumulative spending	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018 Setup Update	
Member cumulative spending	Spending amount	Member count Clear
Unspecified		3911
Total member count		3911

** After edit setup, please press update

Back | New   **1.Press <New>.**   Close

Member record   Search | New | Config | Details | Display

New member cumulative spending	
Member cumulative spending	$1-$10,000 (Maximum 50 characters)
Spending amount	>=$ 1 and <$ 10000

2.Set appropriate member cumulative spending and spending amount.

3.Press <Submit> to add the group.   Submit   Reset   Cancel

Member cumulative spending	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018 Setup Update	
Member cumulative spending	Spending amount	Member count Clear
$1-$10,000	>= $1及 < $10000	0
Unspecified		3911
Total 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 cumulative spending	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018 Setup Update	
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

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.

Member cumulative spending	Spending amount	Member count	
	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018 Last update date : 11-Sep-2018 02:54 pm Setup Update		
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.

Member cumulative spending	Spending amount	Member count	
	Use payment amount to calculate spending, invoice from 1-Jun-2017 to 30-Jun-2018 Setup Update		
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		
$100,000-$200,000	>=$100000及 < $200000		
$200,000-$500,000	>= $200000及 < $500000		
Unspecified			3911
	Total member count		3911

2.Press the columns to edit or delete the groups.

3.After the reset is done, press <Update> so the system will assign the members to the appropriate groups of spending.

** 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

Select appropriate member group as search criteria.

You can manually upgrade the groups for members if needed.

Display Member Cumulative Spending

Member > Member Record > Display

Member field	Details - Member record	Details - Booking / Invoice	New member - Member record	New member - Booking / Invoice	Report	Member application form	Member application form PDF page break
	Select All	Select All	Select All	Select All	Select All	Select All	Select All
Join shop Select All	☑	☑	☑	☑	☑	☑	☐
Member group Select All	☑	☑	☑	☑	☑	☐	☐
Member code Select All	☑	☑	☑	☑	☑	☐	☐
Full name Select All	☑	☑	☑	☑	☑	☐	☐
Last name Select All	☑	☑	☑	☑	☑	☑	☐
First name Select All	☑	☑	☑	☑	☑	☑	☐
English name Select All	☑	☑	☑	☑	☑	☑	☐
Chinese name Select All	☑	☑	☑	☑	☑	☑	☐

Personal info

Member field							
Identity card Select All	☑	☑	☑	☑	☑	☑	☐
Gender Select All	☑	☑	☑	☑	☑	☑	☐
Birth date Select All	☑	☑	☑	☑	☑	☑	☐
Age group Select All	☑	☑	☑	☑	☑	☑	☐
Occupation Select All	☑	☑	☑	☑	☑	☑	☐
Member cumulative spending Select All	☑	☑	☑	☑	☑	☑	☐
Educational Level Select All	☑	☑	☑	☑	☑	☑	☐

Contact

Member field							
Home telephone Select All	☑	☑	☑	☑	☑	☑	☑
Office telephone Select All	☑						☐
Mobile telephone Select All	☑						☐
Pager Select All	☑						☐
Fax Select All	☑						☐
Email Select All	☑						☐
Home address Select All	☑	☑	☑	☑	☑	☑	☐
Office address Select All	☑	☑	☑	☑	☑	☑	☐
Mailing address Select All	☑	☑	☑	☑	☑	☑	☐
Country Select All	☑	☑	☑	☑	☑	☑	☐

Membership

Member field							
Join date Select All	☑	☑	☑	☑	☑	☑	☑
Discount rate Select All	☑	☑	☑	☑	☑	☑	☑
Consultant Select All	☐	☐	☐	☐	☐	☐	☐
Therapist Select All	☐	☐	☐	☐	☐	☐	☐
Prefer therapist Select All	☐	☐	☐	☐	☐	☐	☐
Prefer room Select All	☐	☐	☐	☐	☐	☐	☐
Last consultant Select All	☐	☐			☐	☐	
Receive Promotion Materials in Select All	☑	☑	☑	☑	☑	☑	☐
Referred by (Member) Select All	☐	☐	☐	☐	☐	☐	☐
Referral point Select All	☐	☐			☐	☐	
Remark Select All	☑	☑	☑	☑	☑	☑	☐
從何認識我們? Select All	☑	☑	☑	☑	☑	☑	☐

Member transaction

Member field	Details - Member record	Details - Booking / Invoice				Member application form	
Accumulated other billed Select All	☐	☐				☐	
Accumulated total billed Select All	☑	☑				☑	
Installment outstanding amount Select All	☑	☑				☑	
Last sales date Select All	☑	☑				☑	
Last treatment date Select All	☑	☑				☑	

Input control

	First no control Format:(2,3)	Digits control Format:(2,3)	Must input
Home telephone	2,3	8	☐
Office telephone	2,3	8	☐
Mobile telephone	9,6,8,5,	8	☐
Identity card			☐

> 1. Check the boxed of 'Member cumulative spending' to display so that users can use it to search for members and conduct analysis.

Submit   **Reset**

> 2. Press 'Submit' to save the setting.

Generate Member Record Report with Member Cummulative Spending

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

Member > Report > Member Record Report

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

New member report setup

Report name (English)		Maximum 200 characters
Report name (中文)		Maximum 200 characters

Allow use report user group

- All user group
- A/C & HR
- Admin
- Admin - Inventory & Reporting
- ALL
- Clerk
- Consultant

Member field	Report criteria	Report content
Join shop *(**Renew)*	☐	☐
Member group *(**Renew)*	☐	☐
Member code	☐	☐
Name	☐	☐
Last name	☐	☐
First name	☐	☐
English name	☐	☐
Chinese name	☐	☐

Personal info		
Identity card	☐	☐
Gender *(**Renew)*	☐	☐
Birth date	☐	☐
Age group *(**Renew)*	☐	☐
Occupation *(**Renew)*	☐	☐
Member cumulative spending *(**Renew)*	☐	☐
Educational Level *(**Renew)*	☐	☐

Check the boxes to let member cumulative spending be part of report criteria and content.