

## Active inactive member

Clearly identify which member is active and which member is inactive.

Also provide information on the latest spending and visiting status, outstanding amount and installment outstanding amount.

Company can initiate appropriate action on individual case.

### Report content

HKB2B Limited

Active inactive member

Inactive customer represent no invoice within 3 month

Member group	Member code	Join shop	Installment outstanding amount	Last sales date	Last sales amount	Last visit date	Total spending amount	Outstanding amount	Deposit outstanding amount	Status	
Silver	WeM-10031	CTL	\$0.00	15-Mar-2010	\$1,440.00	15-Mar-2010	\$278,055.00	\$6,800.00	\$4,400.00	Inactive	Case 1
Silver	WeM-10032	CTL	\$15,000.00	10-Jan-2014	\$96.00	30-Jul-2014	\$247,994.00	\$23,000.00	\$30,000.00	Active	Case 11
Silver	WeM-10033	CTL	\$0.00	17-Mar-2010	\$24,422.00	31-Aug-2014	\$126,975.00	\$1,300.00	\$500.00	Active	Case 12
Gold	WeM-10034	CTL	\$10,000.00	12-Mar-2010	\$576.00	12-Mar-2010	\$177,319.00	\$15,000.00	\$3,000.00	Inactive	Case 2
Gold	WeM-10035	CTL	\$28,000.00	15-Apr-2010	\$1,435.00	16-Apr-2010	\$80,009.00	\$3,000.00	\$2,000.00	Inactive	Case 3
Gold	WeM-10036	CTL	\$0.00	10-Apr-2010	\$880.00	10-Apr-2010	\$124,724.00	\$0.00	\$0.00	Inactive	
Gold	WeM-10037	CTL	\$0.00	29-Mar-2010	\$5,228.00	31-Jul-2014	\$7,737.33	\$30,000.00	\$100,000.00	Active	Case 13
Platinum	WeM-10038	CTL	\$0.00	20-Mar-2010	\$0.00	20-Mar-2010	\$296,184.00	\$0.00	\$0.00	Inactive	
Platinum	WeM-10039	CTL	\$0.00	11-Mar-2010	\$0.00	11-Mar-2010	\$263,592.00	\$0.00	\$0.00	Inactive	
Platinum	WeM-10040	CTL	\$0.00	4-Mar-2014	\$10,000.00	26-Aug-2014	\$80,333.00	\$0.00	\$0.00	Active	

No of Members: 10

#### Cases on inactive member

Case 1 : Member is inactive and no installment outstanding amount.

Case 2 : Member is inactive, installment outstanding amount < outstanding amount + deposit outstanding amount.

Case 3 : Member is inactive, installment outstanding amount > outstanding amount + deposit outstanding amount.

#### Cases on active member

Case 11 : Member is active, existed of installment outstanding amount.

Case 12 : Member is active, outstanding amount and deposit outstanding amount is close to zero.

Case 13 : Member is active, existed outstanding amount and deposit outstanding amount.



Member report

List Config

Active and inactive member report

Inactive member represent no transactions within 3 month

Update

Last updated :

5-Sep-2014 04:06 pm Ivy Yu (beauty)

**Join shop** All  
CTL  
CWB  
TST

**Member group** All  
Delete  
VIP  
試做  
Walk In \*\*\*Select [ All ], deleted member will not be displayed at search results. please select [ deleted ] to search deleted members

**Member code**  to  or

Since member can be active for today but become inactive tomorrow. Remember to check the last updated date of inactive calculation. Press update if required.

Member transaction

**Installment outstanding amount** Please select

**Last sales date** -- / --- /  to -- / --- /  Quick select

**Last sales amount** Please select

**Last visit date** -- / --- /  to -- / --- /  Quick select

**Total spending amount period**  Include zero amount member  
-- / --- /  to -- / --- /  Quick select +Add

**Outstanding amount** All  
面部護理項目  
身體按摩項目  
眼部護理項目  
水療浸浴療程 All

Include zero amount member

**Invoice date** -- / --- /  to -- / --- /  Quick select +Add

**Status**  All  
 Active  
 Inactive

Submit Reset Cancel Excel

Inactive member definition at Member > Setup

Inactive member definition within 3 Months , No transactions ( = No invoice, No invoice and no treatment done )

Report name (English)  Maximum 200 characters

Report name (中文)  Maximum 200 characters

Allow use report user group

- All user group
- Admin
- Director\_Corp
- Office\_PI
- Reception\_pos
- Retail\_PI
- Sales\_pos

Member field	Report criteria	Report content	Member field	Report criteria	Report content	Member field	Report criteria	Report content
<b>Member field</b>			<b>Contact</b>			<b>Member transaction</b>		
Join shop (**Renew)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Home telephone	<input type="checkbox"/>	<input type="checkbox"/>	Installment outstanding amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Member group (**Renew)	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Office telephone	<input type="checkbox"/>	<input type="checkbox"/>	First sales date	<input type="checkbox"/>	<input type="checkbox"/>
Member code	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Mobile telephone	<input type="checkbox"/>	<input type="checkbox"/>	First sales amount	<input type="checkbox"/>	<input type="checkbox"/>
Full Name	<input type="checkbox"/>	<input type="checkbox"/>	Pager	<input type="checkbox"/>	<input type="checkbox"/>	First invoice analysis code (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>
Last name	<input type="checkbox"/>	<input type="checkbox"/>	Fax	<input type="checkbox"/>	<input type="checkbox"/>	First invoice promotion code (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>
First name	<input type="checkbox"/>	<input type="checkbox"/>	Email	<input type="checkbox"/>	<input type="checkbox"/>	Second sales date	<input type="checkbox"/>	<input type="checkbox"/>
English Name	<input type="checkbox"/>	<input type="checkbox"/>	Home address	<input type="checkbox"/>	<input type="checkbox"/>	Second sales amount	<input type="checkbox"/>	<input type="checkbox"/>
Chinese Name	<input type="checkbox"/>	<input type="checkbox"/>	Office address	<input type="checkbox"/>	<input type="checkbox"/>	Last sales date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
<b>Personal Info</b>			Mailing address	<input type="checkbox"/>	<input type="checkbox"/>	Last sales amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
HK ID Card No	<input type="checkbox"/>	<input type="checkbox"/>	Country (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Last visit date	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Gender (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Sources (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	[Booking status=Arrived / Ready/ Finished]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Date of Birth	<input type="checkbox"/>	<input type="checkbox"/>	<b>Membership</b>			Total spending amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Age	<input type="checkbox"/>	<input type="checkbox"/>	Join Date	<input type="checkbox"/>	<input type="checkbox"/>	[Calculate invoice amount]	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Age Group (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Discount rate	<input type="checkbox"/>	<input type="checkbox"/>	Spending amount by product	<input type="checkbox"/>	<input type="checkbox"/>
Occupation (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Consultant (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Spending amount by treatment	<input type="checkbox"/>	<input type="checkbox"/>
Education Level (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Therapist (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	[Include treatment , flexi treatment , beauty unit , deposit]	<input type="checkbox"/>	<input type="checkbox"/>
			Prefer therapist	<input type="checkbox"/>	<input type="checkbox"/>	Treatment value	<input type="checkbox"/>	<input type="checkbox"/>
			Prefer room	<input type="checkbox"/>	<input type="checkbox"/>	Last treatment date	<input type="checkbox"/>	<input type="checkbox"/>
			Last Consultant	<input type="checkbox"/>	<input type="checkbox"/>	[Booking status=Finished]	<input type="checkbox"/>	<input type="checkbox"/>
			Receive Promotion Material in	<input type="checkbox"/>	<input type="checkbox"/>	Outstanding amount	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			Heard about company sources (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Outstanding quantity	<input type="checkbox"/>	<input type="checkbox"/>
			Referred By	<input type="checkbox"/>	<input type="checkbox"/>	Member visit count	<input type="checkbox"/>	<input type="checkbox"/>
			Referor Point	<input type="checkbox"/>	<input type="checkbox"/>	[Booking status=Arrived / Ready/ Finished]	<input type="checkbox"/>	<input type="checkbox"/>
			Remarks	<input type="checkbox"/>	<input type="checkbox"/>	Active / inactive member	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
			其他意見	<input type="checkbox"/>	<input type="checkbox"/>	[Inactive member definition at Member > Setup]	<input type="checkbox"/>	<input type="checkbox"/>
			Other opinion (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>	Invoice count	<input type="checkbox"/>	<input type="checkbox"/>
			對本中心服務的意見	<input type="checkbox"/>	<input type="checkbox"/>			
			What is your opinion on our service? (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>			
			美容中心專業服務?	<input type="checkbox"/>	<input type="checkbox"/>			
			What do you think about our service? (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>			
			美容中心環境?	<input type="checkbox"/>	<input type="checkbox"/>			
			Beauty centre environment ? (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>			
			肌膚類型	<input type="checkbox"/>	<input type="checkbox"/>			
			What is your skin type? (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>			
			面部潔膚系列	<input type="checkbox"/>	<input type="checkbox"/>			
			從何途徑認識HKB2B?	<input type="checkbox"/>	<input type="checkbox"/>			
			How do you know about HKB2B?	<input type="checkbox"/>	<input type="checkbox"/>			
			平均每月美容消費?	<input type="checkbox"/>	<input type="checkbox"/>			
			Average consumption on beauty products? (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>			
			團購編號: (**Renew)	<input type="checkbox"/>	<input type="checkbox"/>			