First trial generated sales report

A first trial campaign can attract how many members to spend, can trigger how much they spend, can maintain for how long and the magnitude ?

All the answers can be found in First trial generated sales report.
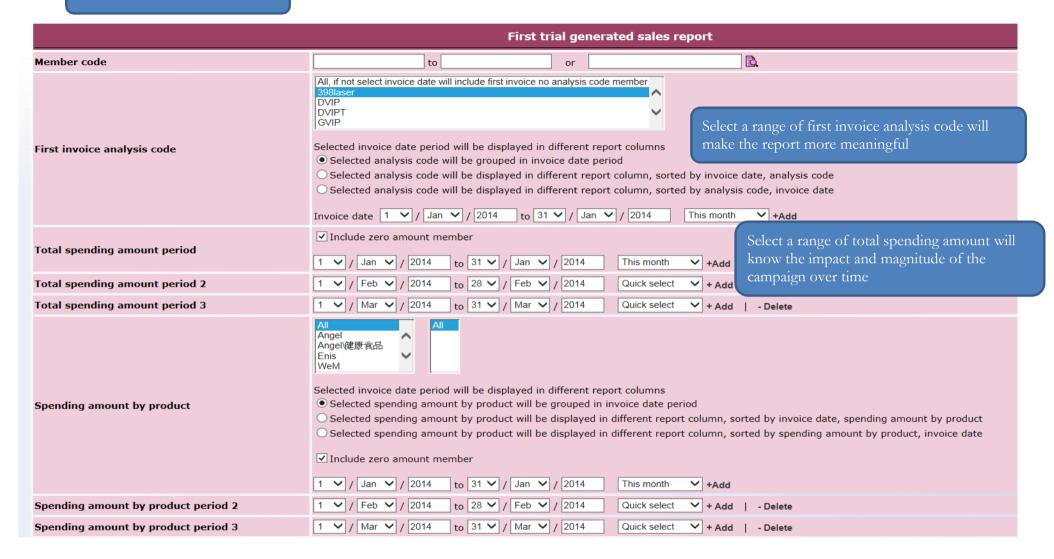
Report content

HKB2B Limited
First trial generated sales report

Member code	First invoice analysis code	Total spending amount 1-Jan-2014 to 31-Jan-2014	Total spending amount 1-Feb-2014 to 28-Feb-2014	Total spending amount 1-Mar-2014 to 31-Mar-2014	Spending amount by product 1-Jan-2014 to 31-Jan-2014	Spending amount by product 1-Feb-2014 to 28-Feb-2014	Spending amount by product 1-Mar-2014 to 31-Mar-2014-	Spending amount by treatment 1-Jan-2014 to 31-Jan-2014	Spending amount by treatment 1-Feb-2014 to 28-Feb-2014	Spending amount by treatment 1-Mar-2014 to 31-Mar-2014-	Treatment value 1-Jan-2014 to 31-Jan-2014	Treatment value 1-Feb-2014 to 28-Feb-2014	Treatment value 1-Mar-2014 to 31-Mar-2014-	Invoice count
WeM-10031	398laser	$ 398.00	$ 3388.00	$ 12000.00	$ 0.00	$ 0.00	$ 12000.00	$ 398.00	$ 3388.00	$ 0.00	$ 398.00	$ 1388.00	$ 0.00	3
WeM-10032	398laser	$ 398.00	$ 3388.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 398.00	$ 3388.00	$ 0.00	$ 398.00	$ 1388.00	$ 0.00	2
WeM-10033	398laser	$ 2398.00	$ 5800.00	$ 33800.00	$ 2000.00	$ 5800.00	$ 0.00	$ 398.00	$ 0.00	$ 33800.00	$ 398.00	$ 0.00	$ 5680.00	3
WeM-10034	398laser	$ 398.00	$ 3388.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 398.00	$ 3388.00	$ 0.00	$ 398.00	$ 1388.00	$ 0.00	2
WeM-10035	398laser	$ 398.00	$ 588.00	$ 6888.00	$ 0.00	$ 0.00	$ 5000.00	$ 398.00	$ 588.00	$ 1888.00	$ 398.00	$ 588.00	$ 588.00	3
WeM-10036	398laser	$ 3398.00	$ 0.00	$ 6888.00	$ 1000.00	$ 0.00	$ 5000.00	$ 2398.00	$ 0.00	$ 1888.00	$ 398.00	$ 2000.00	$ 588.00	1
WeM-10037	398laser	$ 398.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 398.00	$ 0.00	$ 0.00	$ 398.00	$ 0.00	$ 0.00	1
WeM-10038	398laser	$ 398.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 0.00	$ 398.00	$ 0.00	$ 0.00	$ 398.00	$ 0.00	$ 0.00	1
WeM-10039	398laser	$ 13678.00	$ 0.00	$ 8888.00	$ 8000.00	$ 0.00	$ 7000.00	$ 5678.00	$ 0.00	$ 1888.00	$ 2398.00	$ 0.00	$ 0.00	2
WeM-10040	398laser	$ 13678.00	$ 7888.00	$ 12378.00	$ 8000.00	$ 5800.00	$ 0.00	$ 5678.00	$ 2088.00	$ 12378.00	$ 2398.00	$ 3388.00	$ 3388.00	3

No of Members : 10

First trial generated sales report

Member code					

Member code: [   ] to [   ] or [   ]

First invoice analysis code

```
All, if not select invoice date will include first invoice no analysis code member
398laser
DVIP
DVIPT
GVIP
```

Select a range of first invoice analysis code will make the report more meaningful

Selected invoice date period will be displayed in different report columns
- (•) Selected analysis code will be grouped in invoice date period
- ( ) Selected analysis code will be displayed in different report column, sorted by invoice date, analysis code
- ( ) Selected analysis code will be displayed in different report column, sorted by analysis code, invoice date

Invoice date [1 ▼] / [Jan ▼] / [2014] to [31 ▼] / [Jan ▼] / [2014]   [This month ▼] +Add

Select a range of total spending amount will know the impact and magnitude of the campaign over time

Total spending amount period

☑ Include zero amount member

[1 ▼] / [Jan ▼] / [2014] to [31 ▼] / [Jan ▼] / [2014]   [This month ▼] +Add

Total spending amount period 2   [1 ▼] / [Feb ▼] / [2014] to [28 ▼] / [Feb ▼] / [2014]   [Quick select ▼] + Add

Total spending amount period 3   [1 ▼] / [Mar ▼] / [2014] to [31 ▼] / [Mar ▼] / [2014]   [Quick select ▼] + Add | - Delete

Spending amount by product

```
All
Angel
Angel\健康食品
Enis
WeM
```
```
All
```

Selected invoice date period will be displayed in different report columns
- (•) Selected spending amount by product will be grouped in invoice date period
- ( ) Selected spending amount by product will be displayed in different report column, sorted by invoice date, spending amount by product
- ( ) Selected spending amount by product will be displayed in different report column, sorted by spending amount by product, invoice date

☑ Include zero amount member

[1 ▼] / [Jan ▼] / [2014] to [31 ▼] / [Jan ▼] / [2014]   [This month ▼] +Add

Spending amount by product period 2   [1 ▼] / [Feb ▼] / [2014] to [28 ▼] / [Feb ▼] / [2014]   [Quick select ▼] + Add | - Delete

Spending amount by product period 3   [1 ▼] / [Mar ▼] / [2014] to [31 ▼] / [Mar ▼] / [2014]   [Quick select ▼] + Add | - Delete

Spending amount by treatment	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 Selected invoice date period will be displayed in different report columns ⦿ Selected spending amount by treatment will be grouped in invoice date period ○ Selected spending amount by treatment will be displayed in different report column, sorted by invoice date, spending amount by treatment ○ Selected spending amount by treatment will be displayed in different report column, sorted by spending amount by treatment, invoice date ☑ Include zero amount member 1 / Jan / 2014 to 31 / Jan / 2014 This month +Add
Spending amount by treatment period 2	1 / Feb / 2014 to 28 / Feb / 2014 Quick select + Add	- Delete
Spending amount by treatment period 3	1 / Mar / 2014 to 31 / Mar / 2014 Quick select + Add	- Delete
Treatment value	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 Treatment date 1 / Jan / 2014 to 31 / Jan / 2014 This month +Add
	Treatment date 2 1 / Feb / 2014 to 28 / Feb / 2014 Quick select + Add	- Delete
	Treatment date 3 1 / Mar / 2014 to 31 / Mar / 2014 Quick select + Add	- Delete
Invoice count	1 / Jan / 2014 to 31 / Mar / 2014 This month

Edit member report setup

	sales report Maximum 200 characters
Report name (中文)	試做產生的銷售報告 Maximum 200 characters
Allow use report user group	All user group Admin Director_Corp Office_PI Reception_pos Retail_PI Sales_pos

Column 1

Member field	Report criteria	Report content
Join shop (**Renew)	☐	☐
Member group (**Renew)	☐	☐
Member code	☑	☑
Full Name	☐	☐
Last name	☐	☐
First name	☐	☐
English Name	☐	☐
Chinese Name	☐	☐
Personal Info		
HK ID Card No	☐	☐
Gender (**Renew)	☐	☐
Date of Birth	☐	☐
Age	☐	☐
Age Group (**Renew)	☐	☐
Personal Info		
HK ID Card No	☐	☐
Gender (**Renew)	☐	☐
Date of Birth	☐	☐
Age	☐	☐
Age Group (**Renew)	☐	☐
Occupation (**Renew)	☐	☐
Education Level (**Renew)	☐	☐

Column 2

Member field	Report criteria	Report content
Contact		
Home telephone	☐	☐
Office telephone	☐	☐
Mobile telephone	☐	☐
Pager	☐	☐
Fax	☐	☐
Email	☐	☐
Home address	☐	☐
Office address	☐	☐
Mailing address	☐	☐
Country (**Renew)	☐	☐
Sources (**Renew)	☐	☐
Membership		
Join Date	☐	☐
Office address	☐	☐
Mailing address	☐	☐
Country (**Renew)	☐	☐
Sources (**Renew)	☐	☐
Membership		
Join Date	☐	☐
Discount rate	☐	☐
Consultant (**Renew)	☐	☐
Therapist (**Renew)	☐	☐
Prefer therapist	☐	☐
Prefer room	☐	☐
Last Consultant	☐	☐
Receive Promotion Material in	☐	☐
Heard about company sources (**Renew)	☐	☐
Referred By	☐	☐
Referor Point	☐	☐
Remarks	☐	☐
其他意見 Other opinion (**Renew)	☐	☐
對本中心服務的意見 What is your opinion on our service? (**Renew)	☐	☐
美容中心專業服務? What do you think about our service? (**Renew)	☐	☐
美容中心環境? Beauty centre environment ? (**Renew)	☐	☐
肌膚類型 What is your skin type? (**Renew)	☐	☐
面部潔膚系列	☐	☐
從何途徑認識HKB2B? How do you know about HKB2B?	☐	☐
平均每月美容消費? Average consumption on beauty products? (**Renew)	☐	☐
團購編號: (**Renew)	☐	☐

Column 3

Member field — Member transaction	Report criteria	Report content
Installment outstanding amount	☐	☐
First sales date	☐	☐
First sales amount	☐	☐
First invoice analysis code (**Renew)	☑	☑
First invoice promotion code (**Renew)	☐	☐
Second sales date	☐	☐
Second sales amount	☐	☐
Last sales date	☐	☐
Last sales amount	☐	☐
Last visit date Second sales date	☐	☐
Second sales amount	☐	☐
Last sales date	☐	☐
Last sales amount	☐	☐
Last visit date [Booking status=Arrived / Ready/ Finished]	☐	☐
Total spending amount [Calculate invoice amount]	☑	☑
Spending amount by product	☑	☑
Spending amount by treatment [Include treatment , flexi treatment , beauty unit , deposit]	☑	☑
Treatment value	☑	☑
Last treatment date [Booking status=Finished]	☐	☐
Outstanding amount	☐	☐
Outstanding quantity	☐	☐
Member visit count [Booking status=Arrived / Ready/ Finished]	☐	☐
Active / inactive member [Inactive member definition at Member > Setup]	☐	☐
Invoice count	☑	☑