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Notification Task

The notification task function helps sending notifications to members to automate the process.

Users only have to configure the recipient and content of the notification once. Users can send out notifications regularly.

To add new notification, go to Member > Notification task > New

New notification task	
Task name	
Notification action	☐ Issue invoice Cashier Exchange return Swap Settlement Edit invoice Void invoice TreatmentRedemption Undo finish booking Bonus pointRedemption ☐ Invoice with treatment only ☐ Gain bonus point ☐ Redeem bonus point ☐ Member upgrade ☐ New member
Notification through	⦿ Email ◯ SMS

Notification task information

📖 Task name: A brief description of the notification task

📖 Notification action：Following actions will tigger system to send notifications to members.

- Cashier：System sends notifications after issue invoice.

- Issue invoice with treatment only：System sends notifications after issue invoice with treatment only.

- Gain bonus point：System sends notifications after member gain bonus point.

- Redeem bonus point：System sends notifications after redeem bonus point.

- Member upgrade：System sends notifications after member upgrade.

- New Member：System sends notifications after member registered.

📖 Notification through：Email and SMS can be used.

(For email notifications, users have to provide a mail server as sender)

(For SMS notifications, HKB2B can help apply for an SMS account as sender)

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Testing

Member use for test	[ ] 🔍
	Press test icon will send notification to this member only

  Member use of test：Input member code, click < Email / SMS test>. The system will send notifications to this member only.

Activeness

Setup	within [ ] Day ▾ , No transactions (= No invoice, No payment and no treatment done) ▾

  Member activity: Input the period of within __ day/month/year, no transactions during this period (no invoice, payment or treatment done) or without any of invoice, payment or treatment done. System will send the notifications to those members.

Member spending

Spending	>= ▾ [ ] last [ ] Day ▾
Finished all purchased treatment and no new purchase	within Please select ▾ finished all purchased treatment and no new purchase thereafter ☐ finished all purchased treatment include swap invoice and expired invoice deductions

  Spending: Member total spending achieve less than, equal to or not more than $ ___, last __ day/month/year. System will send the notifications to those members.

  Finished course and deposit：When members finish all their prepaid items, and they have not purchased within ___ month, notifications will be sent to these members. Check the box to include finish prepaid items caused by refunds and expiry.

Member visit
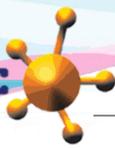
Treatment date	Please select ▾

  Treatment date: If member has finishes treatment record within __ day / month / year, they will receive notifications.

Member bonus point

Expiry date	within Please select ▾

  Expiry date: When points that member own expire within __ day / month / year, they will receive notifications.

Member upgrade / downgrade	
Member upgrade date	within [___] [Day ▾]

📖 Member upgrade date: Member update within ___ day/month/year. System will send the notifications to those members.

Member next upgrade / downgrade spending variance			
Member auto upgrade setup	Original member group	Member spending	New member group
	⦿ New Member	From >= $10000 to < $200000	VIP Silver
	○ VIP Silver	More than >= $200000	VIP Gold
	Clear selection		
Upgrade spending variance	[<= ▾] [25] % member spending [>= ▾] $ [7500]		
Downgrade spending variance	[>= ▾] [___] % member spending [<= ▾] $ [___]		

📖 Member auto upgrade setup: Select member auto upgrade rules and input update/ downgrade spending variance.

📖 Upgrade spending variance: Choose to only send notifications to members who have outstanding consumption less than or equal to / greater than or equal to ___ %, members who have already spent more than or equal to / less than or equal to $___ will be upgraded.

📖 Downgrade spending variance: Choose to only send notifications to members who have outstanding consumption less than or equal to / greater than or equal to ___ %, members who have already spent more than or equal to / less than or equal to $___ will be downgraded.
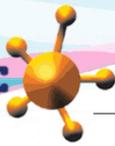
Example of member upgrade spending variance setting

The system will screen the members currently in the group of "New Member".
Their current spending amount does not meet the conditions for upgrading to VIP Silver (the spending amount is more than $10,000).

Member next upgrade / downgrade spending variance			
Member auto upgrade setup	Original member group	Member spending	New member group
	⦿ New Member	From >= $10000 to < $200000	VIP Silver
	○ VIP Silver	More than >= $200000	VIP Gold
	Clear selection		
Upgrade spending variance	[<= ▾] [25] % member spending [>= ▾] $ [7500]		
Downgrade spending variance	[>= ▾] [___] % member spending [<= ▾] $ [___]		

Members can upgrade to VIP Silver as long as they continue to spend "less than or equal to 25%" .
This member will receive notifications.

Example of member downgrade spending variance setting

The system will screen the members currently in the group of "VIP Silver".
Their current consumption amount is not enough to maintain the conditions of VIP Silver
(the consumption amount is more than $10,000).

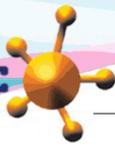| Member next upgrade / downgrade spending variance				
Member auto upgrade setup		Original member group	Member spending	New member group
	⦿	New Member	From >= $10000 to < $200000	VIP Silver
	○	VIP Silver	More than >= $200000	VIP Gold
	Clear selection			
Upgrade spending variance	<= ∨ ___ % member spending		>= ∨ $ _____	
Downgrade spending variance	<= ∨ 25 % member spending		>= ∨ $ 7500	

Members need to continue to spend more "less than or equal to 25%" to avoid being downgraded to New Member. This member will receive notifications.

Member date		
Join date	within ∨ ___ Day ∨	
Birth month	All ∨	
Join month	All ∨	

📖   Join date: If members have joined for less or more than __ day / month / year, they will receive notifications.

📖   Birth month: Filtered by member birth month. There are conditions such as current month, current / previous month, current / next month, previous month / current month / next month.

📖   Join month: Filtered by member join month. There are conditions such as current month, current / previous month, current / next month, previous month / current month / next month.

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Member field	
Member group	全部 / New Member / Group Buying
Join shop	全部 / Central
Consultant	全部 / Central ‖ 全部 / Amy (S007) / cobi_testing (MK002)
Gender	全部 ▾
Age group	全部 / < 18 / 49 - 58
Occupation	全部 / Executive
Educational Level	全部 / Master or above

📖 Filter member fields include: member group, join shop, consultant, gender, age group, occupation, education level, country, interest group, and heard about company channel. The default is set to 'all'. Users can edit more than one filter as needed.

📖 User can add the configuration member field to notification task.

Config member field at Member > Member record > Config

Member field configuration

Member field	Type	Category	Sequence	Must input	Display at advanced search	Display at booking table	Display at notification task	View member user access group	Edit member access group		
How to know our shop?	Check box (Multiple selection)	Personal Information	0	User select	Not display	Not display	Not display	All	All	Edit	Delete

Press <Edit>

Edit member field

Type: Check box (Multiple selection) / Category: Personal Information / Must input ☐
Display at member search ☐ / Display at booking table ☐ / Display at notification task ☐ /
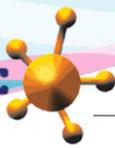Sequence 0

View access group: Admin / Account Department / Logistic Department / Marketing Department

Edit access group: Admin / Account Department / Logistic Department / Marketing Department

Click <Display at notification task>

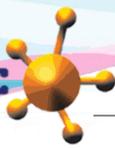| Member field (Maximum 200 characters)	Sequence	Answer selections (Maximum 200 characters)	Additional text box	Hidden
How to know our shop?	1	magazine	☐	☐

Template

Variables

@@@membername@@@ = Member name

@@@membercode@@@ = Member code

@@@membergroup@@@ = Member group

@@@lasttransactiondate@@@ = Last transaction date

@@@bonuspointexpdate@@@ = Bonus point expiry date

@@@bonuspointbalance@@@ = Bonus point balance

@@@finishedtreatmentname@@@ = Finished treatment name

@@@treatmentreceiptdate@@@ = Treatment receipt date

@@@treatmentreceiptno@@@ = Treatment receipt number

@@@UpgradeSpendingDifference@@@ = Upgrade spending difference

@@@DowngradeSpendingDifference@@@ = Downgrade spending difference

English template

Subject

Traditional chinese template

Subject

Submit   Reset

After completing notification settings and content, click <Submit> to save.

Content that the member receives

- The user needs to set the content in English and Chinese format, and the system will send the relevant format according to the member's language setting.

- Subject: Subject of the email. Applicable to email only.

- Content: Input content of the notification. Variables can be added to the content. For example, input member variable into content. When member received the notification, there will display member name.

  - Variables include: member name, member code, latest transaction date, bonus point expiry date, bonus point balance, finished treatment name, treatment receipt date, treatment receipt number.

  - Invoice variables include: item name, item purchase quantity, item used quantity, item outstanding quantity, finished treatment name, bonus point b/f, bonus point gain, bonus point used, bonus point balance, invoice shop, invoice date, invoice no, reference invoice no, prepared by, sales, invoice amount, instalment amount, paid amount, payment method, invoice remark, create date, original invoice no, treatment receipt date, treatment receipt number.

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After completing notification settings and content, click <Submit> to save.

Testing	
Member use for test	00107 📇 Mary Ho Press test icon will send notification to this member only **Please press submit** before preview or send test notification Preview Test email

In the testing part, users can review the notification content. Click <Preview>, or click <Test Email / SMS>, the system will send notifications to member for testing.

@@@treatmentreceiptno@@@ = Treatment receipt number Preview Please press submit before preview	

In the template part, click <Preview> for viewing the content.

⬆ Submit   ⬇ Reset

After adding new notification

Use keywords to search for notification tasks

Task name keyword [   ] Input keyword and press [Enter] will filter following list

SMS balance : 920

Task count : 2

SMS available balance

Click <Member list> to view members who met the conditions.

Notification task list			
Task name (Sorting)	Criterias	Member list	Notification through
每月生日會員通知 New Edit Copy Delete	Birth month : Current month	[Member list]	Preview Test email Email
優惠價通知 (不活躍會員) New Edit Copy Delete	No transactions within 1 month Treatment date :	[Member list]	Preview Test SMS SMS

Click <New> to add new notification task.

Click <Edit> to edit the notification task.

Click <Copy> to copy the notification task according to the content and conditions.
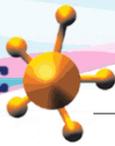Users can edit on the copied task.

Click <Delete> to delete the notification task.

Click <Preview> to view the notification content.

Click <Test email / SMS>, the system will only send notifications to the test member, for checking purposes.

Click <Email / SMS> to send the notification to members who met the conditions.

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Search notification task record at Member > Notification task > Record

Notification task log					
Date	From 1 / Jun / 2021 to 30 / Jun / 2021 or Quick select				
Staff					

Input the criteria, then click <Submit> to search

Submit   **Reset**

Notification task log list				
Date	Staff	Task name	Criterias	Action
15-Oct-2020 13:47:18	HKB2B Support (beauty)	Birthday point	Spending : >=1000 last 3 Month Join date : within 12 Month Member group : Noti, bonus Birth month : Current month / Next month	SMS
15-Oct-2020 13:46:34	HKB2B Support (beauty)	Birthday point	Spending : >=1000 last 3 Month Join date : within 12 Month Member group : Noti, bonus Birth month : Current month / Next month	Testing SMS

  The notification task record list will display, details include sending date, staff, task name, the member search criteria and the sending method.