

Trial Member

- Just assign an analysis code to member's booking
- Member's arrival, finish and sales records will display in Member Trial Booking List
- Analysis of trial member by consultant will be displayed in Member Trial Booking List by Consultant

New Analysis Code

Analysis code can be used to recognize trial member from different source, e.g. facebook, roadshow, walk-in.

New analysis code at Master > General Settings > Analysis

Analysis code list

<u>Code</u>	<u>Description</u>	<u>Status</u>	<u>Action</u>	
FB	Face book	Active	Edit	Delete
RS	Road Show	Active	Edit	Delete
XA	Promotion Team A	Active	Edit	Delete
XB	Promotion Team B	Active	Edit	Delete

New analysis code

Code	<input type="text" value="Google"/> (Maximum 20 characters, Must input)
Description	<input type="text" value="Google Ad."/> (Maximum 255 characters)
Status	<input type="checkbox"/> Inactive

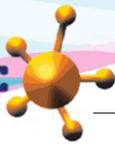
Input code and description, and then press <submit> to new analysis code.



Submit



Reset



Update Analysis Code at Booking Remark to Identify Trial Booking

At booking > booking table > select booking

7-May-2020, Thursday Shop All Table Display New Member

Shop TKO Member WeM-1999 Sign tr Sign Inv Sign Col Ms Fong Mary / Lv5

R A F SEND CST \$ M T B Book My Account Campaign History Installment Details Document R Int. Current time: 2:55:29pm

Time	10-7 Yuki Cheng	10-7 Candy Chan	10-7 Apple Yu	Unspecified
12:00 pm	WeM-1999 •Apple Yu (IS007) •Lv5 •Ms Fong Mary •738117 •7-May-2020 (Whitening Hand Mask)			
12:15 pm				

Press <Remark> to add analysis code

Shop	Booking ID	Status	Arrived time	Date	Booking time	Treatment	Therapist	Create booking staff	Create booking time	Last updatedStaff	Last updated time	Remark
TKO	738117	Confirmed		7-May-2020	12:00 pm - 12:15 pm	WHM, Whitening Hand Mask	Yuki Cheng	HKB2B Support (beauty)	8-May-2020, 02:23 pm	HKB2B Support (beauty)	8-May-2020, 02:26 pm	

Back | Modify | Reconfirm | Arrive | Ready | Cancel | No Show | Cancel + Redeem | No Show + Redeem | Finish | Remove | Booking reminder | Comment | Remark | Close

Edit 738117 booking remark

Member	Ms Fong Mary (WeM-1999)
Treatment	Whitening Hand Mask (WHM)
Time	12:00 pm - 12:15 pm
Therapist	Yuki Cheng (IS001)
Room	Unspecified room
Analysis code	RS
Remarks	(Maximum 100 characters)

Select analysis code and press <submit>

Submit Reset Cancel

Time	10-7 Yuki Cheng	10-7 Candy Chan	10-7 Apple Yu	Unspecified
12:00 pm	WeM-1999 R: RS •Apple Yu (IS007) •Lv5 •Ms Fong Mary •738117 •7-May-2020 (Whitening Hand Mask)			
12:15 pm				

Selected analysis code will display in booking slot

Shop	Booking ID	Status	Arrived time	Date	Booking time	Treatment	Therapist	Create booking staff	Create booking time	Last updatedStaff	Last updated time	Remark
TKO	738117	Confirmed		7-May-2020	12:00 pm - 12:15 pm	WHM, Whitening Hand Mask	Yuki Cheng	HKB2B Support (beauty)	8-May-2020, 02:23 pm	HKB2B Support (beauty)	8-May-2020, 03:00 pm	RS



Assign Consultant to Member for Follow Up

At edit member details, select consultant under membership section.

7-May-2020, Thursday Shop All Table Display New Member

Shop TKO Member WeM-1999 Sign tr Sign Inv Sign Col Ms Fong Mary / Lv5

R A F SEND CST M T B Book My Account Campaign History Installmen **Details** Document R Int. Current time:2:55:29pm

View member

Member group	Lv5
Member code	WeM-1999
Member name	Ms Fong Mary
Last name	Fong
First name	Mary
English name	
Chinese name	

Personal Information

Identity card:

Gender: Male

Birth day:

Press <Edit>

Shop	Booking ID	Status	Arrived time	Date	Booking time
TKO	738117	Confirmed	7-May-2020	12:00 pm - 12:15 pm	Mask Cheng (beauty) pm (beauty) pm

View **Edit** Close

Back | Modify | Reconfirm | Arrive | Ready | Cancel | No Show | Cancel + Redeem | No Show + Redeem | Finish | Remove | Booking reminder | Comment | Remark Close

Membership

Join date: 6 / May / 2020

Join shop: TKO

Referral:

Member discount: 0 %

TKO IS003 Candy Chan (IS003) Add

TKO - IS007 Apple Yu (IS007) [Default]

Edit

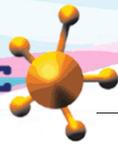
Remove

Submit Reset Cancel

View | Edit Press <Submit> to update Close

Select shop and consultant, then press <Add> to add consultant.

Press <Submit> to update



Analyze New Member Sales by Report

At Member > Report > Member Trial Booking List

Member trial booking list

Shop	<div style="border: 1px solid #ccc; padding: 2px;"> All TKO TST WTC </div>		
Period	From	1 / May / 2020	to 31 / May / 2020 This month
Analysis code	<div style="border: 1px solid #ccc; padding: 2px;"> All Ad Walkin Facebook RS </div>		
Trial treatment	<input type="text"/> to <input type="text"/> or <input type="text"/>		
Purchased treatment	<input type="text"/> to <input type="text"/> or <input type="text"/>		
Consultant	<div style="border: 1px solid #ccc; padding: 2px;"> All TKO TST WTC </div>	<div style="border: 1px solid #ccc; padding: 2px;"> All Apple Yu (IS007) Candy Chan (IS003) Holiday Tse (IS005) Mary Lee (IS002) </div>	Input criteria and press <submit> to view report

Submit
 Reset
 Cancel
 Excel

HKB2B Limited
Member trial booking list

Print On : 11-May-2020
Prepared by : HKB2B Support (beauty)

Shop : All Trial treatment : All to All Period : 6-May-2020 to 6-May-2020 Analysis code : All Consultant : All - All

Number	Date	Member code	Member name	Analysis code	Trial treatment	Therapist	Purchased treatment	Primary sales	Consultant	Booking count	No Show count	Show up count	Cancel count	Same day cancel count	Sign count
1	6-May-2020	WeM-1999	Fong Mary	RS	Deep pore cleansing facial	Yuki Cheng (IS001)	Whitening Hand Mask	Yuki Cheng (IS001)	Apple Yu (IS007)	1	1.00				1.00
2	6-May-2020	wem-2000	Chan Nancy	2.Walkin	天然有機深層保溼面部療程	Candy Chan (IS003)		HKB2B Support (beauty)	Mary Lee (IS002)	1	1.00				
6-May-2020 Total count										2.00	0.00	2.00	0.00	0.00	1.00
Grand Total count										2.00	0.00	2.00	0.00	0.00	1.00

Product and trial sales	Treatment sales	Total sales	Invoice remark
\$ 1,680.00	\$ 2,800.00	\$ 4,480.00	
\$ 1,660.00		\$ 1,660.00	
\$ 3,340.00	\$ 2,800.00	\$ 6,140.00	
\$ 3,340.00	\$ 2,800.00	\$ 6,140.00	

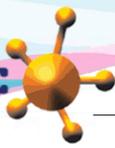
Invoice list

Invoice no	Date	Member	Shop	Invoice amount	Paid amount	Deposit	Outstanding
ISPSI-00730	6-May-2020	Fong Mary (WeM-1999)	TKO	\$ 4,480.00	\$ 4,480.00	\$ 0.00	\$ 0.00
Total				\$ 4,480.00	\$ 4,480.00	\$ 0.00	\$ 0.00

Press sales amount to view invoice list

Back | Print | Excel

Report can be print and export to excel



Report display by member with following details:

- Trial treatment, therapist, analysis code for identifying different source, primary sales and consultant to follow
- The number of booking count, no show count, show up count, cancel count, same date cancel count
- Sign count: Number of new member who had purchase treatment after done a trial treatment on the same day.
- Product and trial sales: Will display the amount of trial treatment done by new member and the amount of purchasing product after done a trial treatment on the same day.
- Treatment sales: Will display the amount of treatment purchased after complete a trial treatment by new member.

View New Member Sales Analysis by Consultant and Consultant Success Rate

At Member > Report > Member Trial Booking List by consultant

Member trial booking list by consultant

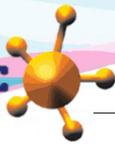
Shop	<div style="border: 1px solid #ccc; padding: 2px;"> All TKO TST WTC </div>					
Period	From	1 / May / 2020	to 31 / May / 2020	This month		
Analysis code	<div style="border: 1px solid #ccc; padding: 2px;"> All Ad Walkin Facebook RS </div>					
Trial treatment	<input type="text"/>	to	<input type="text"/>	or <input type="text"/>		
Purchased treatment	<input type="text"/>	to	<input type="text"/>	or <input type="text"/>		
Consultant	<div style="border: 1px solid #ccc; padding: 5px;"> <table style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 30%; border-right: 1px solid #ccc;"> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Consultant group name</div> <div style="padding: 2px;"> TKO TST WTC </div> </td> <td style="width: 40%; border-right: 1px solid #ccc; padding: 2px;"> <div style="border-bottom: 1px solid #ccc; padding: 2px;">Apple Yu (IS007)</div> <div style="padding: 2px;"> Candy Chan (IS003) Holiday Tse (IS005) Mary Lee (IS002) Yuki Cheng (IS001) </div> </td> <td style="width: 30%; padding: 2px;"> <div style="border-bottom: 1px solid #ccc; padding: 2px;">TKO</div> <div style="padding: 2px;"> TST WTC </div> </td> </tr> </table> <div style="text-align: right; padding: 2px;"> + </div> </div>			<div style="border-bottom: 1px solid #ccc; padding: 2px;">Consultant group name</div> <div style="padding: 2px;"> TKO TST WTC </div>	<div style="border-bottom: 1px solid #ccc; padding: 2px;">Apple Yu (IS007)</div> <div style="padding: 2px;"> Candy Chan (IS003) Holiday Tse (IS005) Mary Lee (IS002) Yuki Cheng (IS001) </div>	<div style="border-bottom: 1px solid #ccc; padding: 2px;">TKO</div> <div style="padding: 2px;"> TST WTC </div>
<div style="border-bottom: 1px solid #ccc; padding: 2px;">Consultant group name</div> <div style="padding: 2px;"> TKO TST WTC </div>	<div style="border-bottom: 1px solid #ccc; padding: 2px;">Apple Yu (IS007)</div> <div style="padding: 2px;"> Candy Chan (IS003) Holiday Tse (IS005) Mary Lee (IS002) Yuki Cheng (IS001) </div>	<div style="border-bottom: 1px solid #ccc; padding: 2px;">TKO</div> <div style="padding: 2px;"> TST WTC </div>				
	<div style="border: 1px solid #ccc; padding: 2px;"> Apple Yu (IS007) </div>					
	<div style="border: 1px solid #ccc; padding: 2px;"> Mary Lee (IS002) </div>					

↑ **Submit**
↺ **Reset**
✕ **Cancel**
↑ **Excel**

After press +, consultant will be displayed individually. Press up / down arrow to arrange sequence.

Select shop on left to filter and select consultant. Then select shop on right to set which shop the selected consultant will be displayed. Press + to finish setup.

Input criteria and press <submit> to view report



HKB2B Limited
Member trial booking list by consultant

Print On : 11-May-2020
 Prepared by : HKB2B Support (beauty)
 Page : 1 / 1

Shop : All Period : 6-May-2020 to 6-May-2020 Analysis code :
 Trial treatment : All to All Purchased treatment All to All

	Apple Yu (IS007)						Mary Lee (IS002)				
	Booking member count	Show up count	Sign count	Product and trial sales	Treatment sales	Success rate	Booking member count	Show up count	Sign count	Product and trial sales	Treatment sales
Wed 6-May-2020	1.00	1.00	1.00	\$ 1,680.00	\$ 2,800.00	100.00%	1.00	1.00	0.00	\$ 1,660.00	\$ 0.00
Grand Total count	1.00	1.00	1.00	\$ 1,680.00	\$ 2,800.00	100.00%	1.00	1.00	0.00	\$ 1,660.00	\$ 0.00

New member's sales record will display separately for selected consultants Apple Yu and Mary Lee

Success rate is calculated by percentage of sign count over booking member count

Any consultant that is not selected at criteria will be display in "Other" section

Success rate	Booking member count	Show up count	Sign count	Product and trial sales	Treatment sales	Success rate	Total booking member count	Total show up count	Total sign count	Total product and trial sales	Total treatment sales	Total success rate
0.00%	0.00	0.00	0.00	\$ 0.00	\$ 0.00	0.00%	2.00	2.00	1.00	\$ 3,340.00	\$ 2,800.00	50.00%
0.00%	0.00	0.00	0.00	\$ 0.00	\$ 0.00	0.00%	2.00	2.00	1.00	\$ 3,340.00	\$ 2,800.00	50.00%

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Report can be print and export to excel