

Create Membership In CRM

Select the Customer Profile and Click “Create Membership”

Q CRM Profile ⓘ [+ New](#) Studio Client Vector

[Export](#) [Create Membership](#)

Mobile ▾ contains ▾ +

ID	Date	State	Mobile	Membership ID	Quote Id	First N
CRM032137580 ⓘ	Mar 31, 2021	Draft	****0563			GUAN
CRM021917989	Feb 26, 2019	Draft	****0563			GUAN

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Enter Membership Card Information

Customer Information

CRM ID

CRM032137580

First Name

GUAN YOW, KENT

Last Name

LAM

Title

Mr

Address

Email (Personal)

kent5525@gmail.com

Mobile

98900563

Date of Birth

Home Number

Company Name

Office Number

Membership Information

Card No *

PCDG-0001

Initial Value

130

Start Date

9-4-2021

Period (Days)

365

Expiry Date

09-04-2022

Current Credit

1. Enter Member Card Number
2. Select Initial Value
3. Select Start Date
4. Select Period

Device Information

Enter Device Information and Package Purchased

Device Information

No	Device Type	Brand	Device Model	Part No	Serial No / IMEI	Package	Remark
1.00	--Please select--	--Please select--	--Please select--	<input type="text"/>	<input type="text"/>	--Please select--	<input type="text"/>

 Edit  Remove  Add

1. Select Device Type
2. Select Brand
3. Select Device Model
4. Enter Part No
5. Enter Serial No or IMEI
6. Select Package Purchased

* If Device Model is not in list, supervisor and insert it

Redeem Process

To deduct the member card values

Business System Process – Issue Member Card

Sales Person

No.	Item Code	Description	Quantity	Unit	Unit Price	Total Price	System
1	PCDG130MCARD	MEMBERSHIP CARD :	1	UNIT	0.00	0.00	 Item linked. Refresh Quantity:
2	PCDG130DIS	ANNIVERSARY MEMBERSHIP DISCOUNT	1	UNIT	0.00	0.00	 Item linked. Refresh Quantity:

1. Select “PCDG130MCARD” and fill in card no
2. Select “PCDG130DIS” for discount value- value must be put “-”as deduction
3. Enter the Member Card in Remark field also

*After complete Business system process then only go CRM membership to proceed redeem

Select member by search Card No

CRM - Customer Membership + New Studio Client Vector

Transaction Cancel Renew Expire Suspend Top-up (Admin) Redeem

Card No +

ID	Date	State	Mobile	Profile ID	Card No	Start Date	Expiry Date	Current Credit	Fir
MEM122000219	Dec 17, 2020	Active	****0558	CRM122036051	PCDG-11002	Dec 17, 2020	Dec 17, 2021	84.00	JAS

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1. Search card no and select it
2. Click redeem

Enter Redeem information

Action Design Work

Redemption

Transaction Date	--- 9-4-2021	12	:	03	PM	Purchase Invoice No *	---
Redeem Value *	---					Invoice Amount *	---
Purchase Location *	---						

1. Enter Purchase Invoice No(Cash bill) – LGHC xxxxx / LCHINV xxxxx
2. Enter Redeem Value – discount amount
3. Invoice Amount
4. Purchase Location – DHB,DHQ, LFO, PCDO