Create Membership In CRM

Select the Customer Profile and Click "Create Membership"

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

Device Information

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

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--			--Please select--	

✎ 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

pcdreams.com.sg

Redeem Process

To deduct the member card values

Business System Process – Issue Member Card

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:

Sales Person: kent

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

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

Enter Redeem information

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