

# PCDREAMS MEMBER CARD

# ISSUE CARD PROCESS FLOW

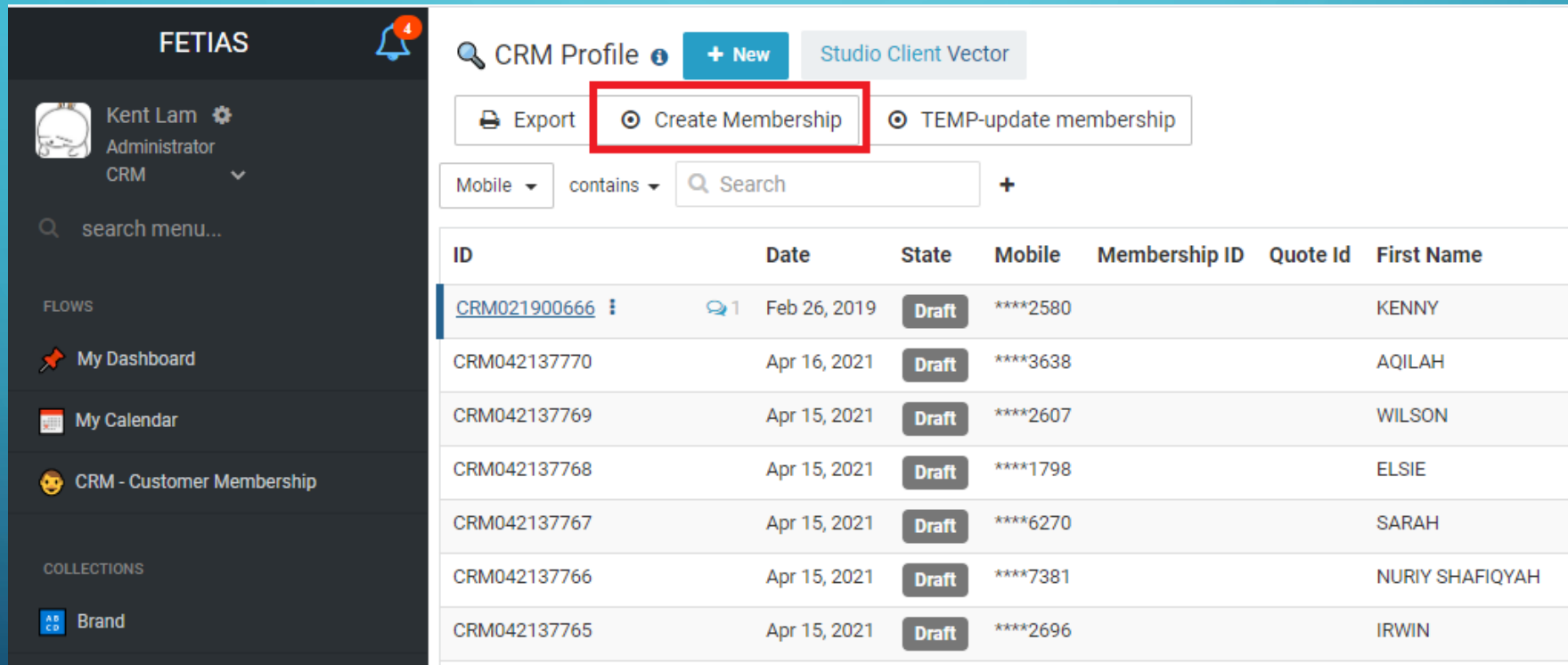


## Flow

1. Upgrade customer profile to member profile
2. Issue the card from business system – card no

# 1. CREATE MEMBERSHIP IN CRM

# 1 A.SELECT THE CUSTOMER PROFILE AND CLICK “CREATE MEMBERSHIP”



The screenshot displays the FETIAS CRM interface. On the left is a dark sidebar with the user profile 'Kent Lam, Administrator CRM' and navigation options like 'My Dashboard', 'My Calendar', and 'CRM - Customer Membership'. The main area shows a 'CRM Profile' view for 'Studio Client Vector'. A red box highlights the 'Create Membership' button in the top action bar. Below this is a search bar and a table of CRM profiles.

ID	Date	State	Mobile	Membership ID	Quote Id	First Name
<a href="#">CRM021900666</a>	Feb 26, 2019	Draft	****2580			KENNY
CRM042137770	Apr 16, 2021	Draft	****3638			AQILAH
CRM042137769	Apr 15, 2021	Draft	****2607			WILSON
CRM042137768	Apr 15, 2021	Draft	****1798			ELSIE
CRM042137767	Apr 15, 2021	Draft	****6270			SARAH
CRM042137766	Apr 15, 2021	Draft	****7381			NURIY SHAFIQYAH
CRM042137765	Apr 15, 2021	Draft	****2696			IRWIN

# 1 B. ENTER MEMBERSHIP CARD INFORMATION

**FETIAS** New CRM - Customer Membership Studio or Work Share

**Customer Information**

CRM ID: CRM021900666

First Name: KENNY      Last Name: NEO  
Title: Mr      Address:   
Email (Personal): Kenny1234567@gmail.com      Mobile: 90552580  
Date of Birth:   
Company Name:      Home Number:   
Office Number:

**Membership Information**

Card No \*      Initial Value: --Please select--  
Start Date      Period (Days): --Please select--  
Expiry Date      Current Credit:

**Device Information**

No	Device Type	Brand	Device Model	Part No	Serial No / IMEI	Package	Remark
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+ Add

write something...  
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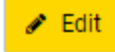
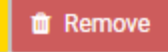

☆ follow this OK Cancel

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

## 2C. 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, please look supervisor and insert it

# 2. ISSUE MEMBERSHIP CARD

IN BUSINESS SYSTEM

# 2A. ISSUE MEMBER CARD

1. Select the package customer purchased
2. Select item “PCDG130MCARD”
3. Enter card number in description and Remarks
4. Enter the Device model and IMEI / Serial No

Grassland Business Client - LAPTOP GENERAL HOSPITAL PTE LTD (server.pcdreams.com.sg:8002)

File Main

Current User: kent

Change Password Logout Support Suggestions, Issues, Bugs Assistance

Type to search menu Move down for List

Dashboard Sales Order Cash Bill

Today Cash Bills New Cash Bill Archive Today Cashier Settlement Cashier Settlement Report Today Settlement Settlement Report

Quotation Invoice Receipt Customer Product Purchase Order Stock Settings

**Sales Person Section**

Sales Person: kent

No.	Item Code	Description	Quantity	Unit	Unit Price	Total Price
1	NANO COATING UNLIMITED	NANO COATING 365-DAYS UNLIMITED MODEL: DEVICE SN   IMEI:	1	UNIT	19.00	19.00
2	PCDG130MCARD	MEMBERSHIP CARD :PCDG-10111	1	UNIT	0.00	0.00

+ - Select from Item List.

Remark: MEMBERSHIP CARD :PCDG-10111  
Device Mode : Huawei P20  
IMEI / SERIAL NO: 123456789123456