# **Techsun Social Hub**

## **User Manual**

**SaaS Version** 

## **DOCUMENT VERSION**

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2021-02-18	Biao	V0.1	Create directory
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2021-08-18	Rayann	V0.7	Add the operating instructions of the
0004 44 07		\/ <u>0</u> 0	Add to a chora of O a chora of
2021-11-27		VU.8	Add iterations of SaaS V1.6 and SaaS V1.7

## NOUN MEANING

**Tenant:** It generally refers to the organization that uses the system. In actual business, it can be divided based on different groups \ companies, or different brands and different regions of the same group \ company.

**Multi-tenancy:** In simple terms, a single instance of a system can serve multiple organizations and support the customized needs and data isolation requirements of different organizations via multi-tenancy technologies.a

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## **1. ABOUT SOCIAL HUB**

Social Hub is a mobile retail CRM solution by Techsun for brands built on cloud native technology and environment. It focused on omni-channel consumer marketing and data management platform. Social Hub drives comprehensive data collection, customer characteristics understanding and customer behavior insight around "people", and then generates individual/group profile of customers, demand prediction and Analytics report. This is to enable data-driven business operation and provide brand member loyalty, points, coupons, marketing, news and other operation and management capabilities, support the brand to achieve a more accurate consumer-products match, and realize the operation management of consumers from the new, promotion, purchase, re-purchase and so on.

#### Value

- Social Hub helps retail brand customers to quickly establish links with consumers, including stores, official websites, APPs, WeChat, Alipay, Tmall, JD, Meituan, Dianping, LINE and other channels, as well as dealer channels and brand affiliate members, so that to realize omni- channel data collection and connection.
- Social Hub provides a variety of marketing tools, such as points, coupon rules, SMS & WeChat
  marketing. Through unique system performance and configurable automatic marketing tools, it helps
  retail brand customers acquire customers at low cost and interact with each other, activate active
  members and stimulate repurchase.
- Social Hub provides data insight. Based on Hadoop big data architecture, it builds a consumer data management platform for brands and provides complete member data management capabilities, including customer profile management, customer Tags, customer clustering management, data visualization and other capabilities.
- Social Hub is based on the cloud native architecture. While providing high-performance support, it helps IT reduces the input of IT operation costs, considers data security and disaster recovery, meets the out-of-the-box needs, and reduces the input of customization costs.

#### Capacity

Social Hub contains following functions:

- Analytics: visualize user situations through overall Customers, user activity analysis, and user retention analysis.Visualize the order status through sales analysis, purchase analysis, and return order analysis;
- Customers: display Personass, segmentations, tags and metadata;
- Membership:dealing with external channels including stores, website, APP, WeChat, Alipay, Tmall, JD, Meituan, public review, and hungry, the channel such as LINE, and the dealer channel, brand cobranded member, etc., through the API layer, system application will be members of the complete data transfer into the system; provide points rules and points engine, deal with points calculation, including points increase, points deduction, points exchange, points expiration, and manage members' points account, points record and points relationship; Provide Loyalty configuration, the basic framework of membership rules, including levels, rules of level rise and fall, rules of basic points, and cost center;
- Marketing: provide a variety of MKT object management, including group of people, product group, Store groups and other object scope management; Provide a variety of MKT rules management, including group MKT rules, individual MKT rules, MKT automation and other common MKT campaign rules configuration; Provide MKT calendar management, easy to view and statistics of daily marketing campaigns;
- Coupons: provide complete coupon rule configuration, support coupon rule configuration, coupon receipt, coupon cancellation, coupon expiration and other closed-loop services;
- Messaging: support the connection with external SMS platform and WeChat platform, realize the management of SMS template and WeChat template and message touch;
- Orders:Processing external channels including stores, website, APP, WeChat, Alipay, Tmall, JD, Meituan, public review, and hungry, the channel such as LINE, and dealer channels, brand cobranded member, etc., through the system application API layer, members of the trade data complete transfer into the system, manage orderss, orders details, payment orderss, trade discount;
- Settings:define system roles, open system accounts, view operation logs and import channel data.

#### Advantage

#### 1. All channels

- Standard connectors are provided to connect third-party platforms to achieve rapid channel access and faster data access;
- Unified omni-channel data collection and management, set up group member ONE ID;
- · Unified operation of brand member rights and interests and incentives to achieve the consistency of

rights and interests of all-channel members;

#### 2. Data and scenario driven

- Accurate clustering based on label and profile;
- Flexible points and coupon rules;
- Full scenario marketing based on customer journey;

#### 3. Cloud native

- Containerized: independent unit of deployment, efficient;
- Microservices: Loose coupling, agility and maintainability;
- Automation: unified scheduling and management center;
- DevOps: faster response, continuous delivery;

#### 4. Cloud with multi-tier patterns

- Transnational and trans-regional business deployment;
- High availability and performance requirements;
- Support for private clouds or Pure SaaS;
- Standardization + customization, fast deployment and flexibility;

## 2. LATEST FUNCTION INSTRUCTION

V1.7.0			
November 26, 2021			
<b>First-level</b>	Secondar		
module	y module	Describe	
Home		Support the business common data dashboard,	
		including users, members, orders and other data;	
Analytics		1. Visually display the total number of users, the	
		number of new users, the number of active users, and	
		the number of purchased users in each time dimension	
	Overview	2. Visual display of sales amount, return amount,	
	Overview	number of orderss, and number of return orders in	
		each time dimension	
		3. Visual display of available points, point issuance,	
		point consumption and other data	
		1. Visually display user overall analysis, user activity	
Cus	Customers	analysis, and user retention analysis in each time	
		dimension	
	ordorcc	1. Visual display of sales analysis, purchase analysis,	
	olueiss	and return analysis in each time dimension	
Customers		1. User view: Support selecting the number of user	
		records displayed on each page;	
		2. Keyword search: filter and query user records based	
		on user name\ID	
	Personas	3. Product recommendation: Based on the	
		recommendation algorithm combined with industry	
		characteristics, select the appropriate algorithm for	
		user product recommendation, support the provision	
		of recommendation result data services, and the	

		recommendation service supports a variety of
		recommendation scenarios, such as guessing your
		favorite, nearby hot sellers, related recommendations,
		discount combinations, etc.
		4. User behavior events are displayed by type and time
		axis, and user behavior trajectory is clear at a glance
		5. User Personass support external data services, for
		example, it can be provided to store shopping guides,
		so that shopping guides can more accurately identify
		and understand user characteristics
		1. User group view, support querying target groups by
		group name and person in charge
		2. Group filter: support free and/or combination
		configuration of target group selection rules based on
		user behavior events and tags
	Sagmontat	3. Segmentationss: display the number of target users,
	ions	common recommended products, and common labels
		to meet business users' intuitive understanding of the
		characteristics of the target population
		4. Segmentationss support external data services,
		which can be connected with corporate CRM, DMP
		and other systems to synchronize group data to
		operation and marketing systems
		1. New tags support 4 types of tags: custom tags,
		preference tags, static tags, and SQL tags
		1) Custom labels: Classify labels by custom label
	Tags	values, and customize label value calculation rules
		according to user attributes and behaviors;
		2) Preference tags: filter out users who meet the tag
		rules through events, and use the user's event attribute

	ranking as the tag value;
	3) Static tags: Classify tags by customizing tag values
	and provide open interfaces to provide unified tag
	services for third-party systems such as customer
	service and shopping guides;
	4) SQL label: Customize label calculation rules by
	writing SQL statements, and use the result returned by
	the SQL statement as the label value.
	2. Label analysis: The system provides the label value
	distribution data after viewing the history 30 updates
	3. Label update function: The system provides the
	function of updating labels regularly and manually.
	4. Tag enable/disable function
	1) Label enablement: The system provides the
	function of enabling the label. After enabling the
	label, the label can be updated regularly and manually:
	2) Disable function: The system provides the function
	of disabling the label. After disabling the label, the
	label will not be updated regularly.
	5. New/edit label grouping: The system supports
	grouping labels.
	6. Preference tags and custom tags support dynamic
	time configuration. Example: the past 7 days
	7. In the population filter, add the configuration items
	that belong to/not belong to the target population
	combination
Metadata	1. Analytics dimension definition, fact data definition,
1	-

		and the definition results are used for customer
		grouping;
Members		Multi-channel membership access capability;
hip		Handle external channels such as official website,
		WeChat official account, applet, Tmall, Meituan,
		Dianping, etc., through the system application API
		layer, complete transmission of member data into the
		system, and create basic level and point accounts for
		members;
		Member upgrade service:
		1. Whenever a new point record/consumption record
		that can be used for upgrade is generated, the
		corresponding member upgrade service needs to be
		activated according to the activated rules (according to
		points, consumption amount, consumption times);
	Members	1) If the level upgrade rules are not met When the
	Wembers	agreed upgrade conditions are met, no changes will be
		made;
		2) If a certain level upgrade condition stipulated in the
		level upgrade rules is met, the following processing
		needs to be done:
		A. Create a new type as an upgraded membership level
		according to the fully qualified level upgrade rules
		Record;
		B. Update the status of the historical member level
		record as invalid;
		C. Update the accumulated points of relegation on the
		member account for judgment
		when relegation; I When the generated points
		record/can be used for upgrading and do not meet the

	upgrading standard, proceed Accumulation;
	I When the generated points record/can be used for
	upgrade and the upgrade has been generated, it
	needs to be updated with the current points/value that
	caused the upgrade;
	3) There can only be one member level with valid
	status under a member name;
	4) Accumulated points for relegation on the member
	account/, when refunding the order, corresponding
	deductions are required, but no upgrade judgment is
	made;
	5) Accumulated points for relegation formula on the
	member account = orders points + orders promotion
	points + manual points adjustment increase- Manual
	points adjustment points reduction-return points
	offset + behavior increase points (whether the above
	points records can be upgraded to yes records);
	Member downgrade service:
	1. In the level downgrade judgment service that is
	regularly activated every day, you first need to query
	the membership level and member information that
	will expire on that day, and then activate the
	corresponding downgrade service according to the
	activated rules (according to points, consumption
	amount, consumption times), do The following
	judgments are made to determine whether the
	accumulated value of the points that can be used for
	upgrading in the points account during the level
	validity period or the consumption amount during the
	level validity period or the number of consumption

		times during the level validity period meet the
		1) Whether the relegation conditions stipulated in the
		level downgrade rules are met , If it is met, do the
		following:
		A. Create a new type of relegation membership level
		record according to the met level downgrade rules;
		B. Update the historical member level record status as
		invalid;
		C. Update the relegation accumulated points on the
		member account/( Cleared)
		2) If not satisfied, do the following processing;
		A. Create a new type of downgraded member level
		record according to the met level downgrade rules;
		B. Update the status of the historical member level
		record as invalid;
		C. Update the member account Accumulated points
		for relegation / (cleared)
		3) There can only be one member level with valid
		status under a member name;
		1. Multi-channel integration capability;
		2. Support the generation of corresponding member
		points account according to the points group
		configured in the loyalty program;
	Dointa	3. The points account includes the following
	Points	information: accumulated points, available points, and
		expired points;
		4. The calculation formula of each point value:
		1) Accumulated points = orders Points + orders
		Promotion Points + Manual Points Adjustment

	Increase-Manual Points Adjustment Points Decrease-
	Return Points Reversal + Behavior Increase Points; (The
	above is the type of points record)
	2) Available Points = orders Points + orders Promotion
	Points + Manual Points Adjustment Increase- Manual
	points adjustment points reduction-return points
	reversal + behavior increase points-behavior reduction
	points-points redeem gifts + points redeem
	cancellation points return-points expire-points redeem
	coupons; (the above is the type of points records);
	3) expired points = Points expired;
	Points earned:
	1. Provide order interface and points calculation
	engine services, support the calculation of points
	according to basic points rules;
	2. Provide external behavior interfaces, support the
	acquisition of points through activities (such as
	external check-in points);
	3. Provide behavior marketing rules, support triggering
	through behavior rules Obtaining points;
	4. Provide batch marketing rules to support batch
	gifting of points for a specific group of people;
	6. Point types include: orders points (plus), orders
	promotion points (plus), manual point adjustment
	increase (plus), manual Point adjustment points
	reduction (minus), points redemption gifts (minus),
	points redemption coupons (minus), behavior increase
	points (plus), behavior reduction points (minus), return
	points offset (minus), points redemption cancel points
	return ( Plus), points expired (minus)

	7. Each point change needs to trigger the update of
	the points information on the member points account,
	and the relevant fields are updated according to the
	formula;
	8. The orders points are calculated according to the
	order details (calculate the amount of points)
	Calculation;
	Points relationship:
	1. The point relationship record is used as the basis for
	the system to record the use of points. The system
	follows the first-in first-out deduction principle when
	the points are used;
	2. The first-in first-out concept: the first deduction for
	the points with the validity period before, if the validity
	period is the same , The credit will be deducted first by
	the creation time;
	3. Points return:
	1) Provide a refund interface. When a refund occurs, it
	needs to be traced back based on whether the original
	order has generated points. If the original order has
	gift points, the points need to be deducted. If the
	original order has used points, the points need to be
	returned;
	2) Each point change needs to trigger the update of
	the points information on the member points account
	and the member user table, and the relevant fields are
	updated according to the formula;
	3) When the points are used in the order , When
	returning the order, the points need to be returned
	retrospectively according to the point relationship, and

		the validity period of the returned points is assigned according to the validity period of the source point record. When the source point record has expired, the returned points plus 1 day will be used as the new validity period;
		Points expiration service:
		1. The point expiration service needs to be activated
		every day to check the points that expired on the day
		for processing;
		2. Start the service every morning and run the points
		that expire within 1 day on the day the service starts;
		1. Social Hub supports the definition of basic points
		rules in the system, and supports the definition of the
		following types of rules:
		1) Supports the definition of basic points under
		different levels;
	Basic	2) Supports the definition of basic points
	Points	under different stores and commodities (commodity
	Rules	Product Categories), as a way to earn points
		Conditions;
		3) Support to define the accumulation of points for
		different member points accounts;
		4) Support to define the calculation method of points
		(according to the amount X yuan = 1 point\According
		to the number of products X unit = 1 point);

	<ul> <li>5) Support to define whether the points can participate in the upgrade calculation ;</li> <li>6) supports the definition points are valid (fixed date, fixed period), we need to set fixed dates: valid (X) Year, month, day; you need to set a fixed period: valid (X) days;</li> </ul>
	<ol> <li>Supports the definition of promotional points rules in the system, and supports the definition of the following types of rules:</li> </ol>
	<ol> <li>Support the definition of promotion points rules under different levels.</li> </ol>
	<ul> <li>2) Support the definition of points earning activity time, target marketing lists of different groups, different stores, and promotion points rules under different products (commodity Product Categories)</li> </ul>
Promotion	as conditions for earning points;
Points Rules	<ol> <li>Support the definition of points calculation method (according to fixed amount full/according to data full) to give fixed points/gift (x) points/yuan ;</li> </ol>
	<ul> <li>4) Support the configuration of discount limit, when the actual payment/original price ≥ discount limit, points will be given</li> </ul>
	5) Support to define whether the points can
	participate in the upgrade calculation;
	6) Support to configure whether this integral rule can
	be used with other promotional integral rules
	7) Support to configure whether users can participate
	in this integral rule repeatedly

	8) Support the configuration of multiple points groups
	Support to define the validity period of points (fixed
	date, fixed period), fixed date needs to be set: validity
	period (X) year, month, date; fixed period needs to be
	set: validity period (X) days;
	1. Configure loyalty program
	Loyalty program naming: support custom
	member loyalty code, loyalty name; (loyalty: brand
	membership system name)
	2. Configuration level
	Social Hub supports the setting of multiple
	membership levels under each Loyalty Configuration;
	level definitions: including level ID, level name, basic
	level (yes\no), level order, level validity type (fixed date,
	fixed period), fixed Date needs to be set: valid period
Loyalty	(X) year, month, date; fixed period needs to be set:
Configurat ion	valid period (X) days;
	3. Configuration level upgrade rules
	Social Hub supports setting up and
	downgrading rules for each level;
	Definition of upgrade and downgrade rules:
	calculation period (recent X days), conditions required
	for upgrade and downgrade ( accumulated points),
	configure which points in the account can participate
	in the points up and down rules;
	4. Configure points group
	Social Hub supports the setting of multiple point

		account types under each Loyalty Configuration, corresponding to the point account name; the point group is linked to the member' s point account, Social Hub provides a design of multiple points accounts of different types under a member account, the system The corresponding point account is automatically generated for members when they register for membership. ;
		5. Configure cost center Social Hub supports setting up multiple cost centers under each Loyalty Configuration; The role of the cost center in the Social Hub is: after the cost center is defined, each cost-related activity will be associated with a cost center, and the stream of points generated based on the activity will be associated with the cost center to meet the cost of subsequent points Attribution statistics
Marketing	Calendar	1. You can check the date distribution of the event through the marketing calendar;
	Campaign s	<ol> <li>Marketing activities support customizing the activity process through the free collocation of users, behaviors, rewards, messages, waiting, and A/B-test nodes.</li> <li>When configuring the activity process, the system provides the functions of adding nodes at the same level, adding subordinate nodes, deleting nodes, and replacing nodes</li> <li>Support to create a new user group or select an existing user group when creating a new event</li> </ol>

		4. Support the definition of message sending channels
		(SMS & WeChat (Official Account & Mini Program))
		and priority reach settings.
		5. Two ways to issue reward support coupons and
		points
		6. Real-time monitoring of future behavior (5 minutes
		level)
		7. Support the approval process
		8. Support the function of regularly launching
		marketing activities
		9. Support the function of urgently ending marketing
		activities
		10. Support multi-wave marketing activities
		11. Support A/Btest type marketing activities
		12 , the system supports marketing activities by
		number, and funnel analysis of each node node
		conversion rate of activity.
		13. During marketing activities, the system records
		trigger behavior, SMS notifications, WeChat
		notifications, coupon issuance, and points issuance
		information.
		14. Marketing activities support dynamic user
		groups
Coupons		1. Support the creation of full discount coupons,
		discount coupons, and redemption coupon rules;
		including rules to fill in: coupon name, total inventory,
	Rules	Loyalty Configuration, cost center, cost, usage
		threshold, discount content, issuance method,
		instructions for use, Validity period, days of the week
		available for use, use of stores, use of goods, refund of

		coupons, stacking restrictions;
		1. Provide behavioral marketing rules to support
		obtaining coupons triggered by behavioral rules;
	Records	2. Provide bulk marketing rules to support batch
		distribution of coupons for a specific group of people;
	Transfer	1. You can view the user's coupon transfer information
	Records	through the transfer record;
Messagin		1 Support for configuring CMC toreplates: support
g		1. Support for configuring SMS templates, support
		for inserting dynamic variables, support for
	<b>C L C</b>	
	SMS	2. Preview: Support real-time preview when editing
	lemplates	SMS template content
	tor	3. Send SMS: Support test sending SMS and
	Domestics	marketing activities trigger, send SMS
		4. Data view: After sending SMS, perform data
		recording: the number of requests, the number of
		successes, the success rate, and the number of failures
		1. Support configuration of SMS templates; support for
		inserting dynamic variables, support for inserting links
	CNAC	2. Preview: Support real-time preview when editing
	SIVIS	SMS template content
	fer Other	3. Send SMS: Support test sending SMS and marketing
	Areas	activities trigger, send SMS
	Aleas	1 Data viewing: After sending SMS porform data
		4. Data viewing. After sending Sivis, perform data
		recording: the number of requests, the number of
		successes, the success rate, and the number of failures
	WeChat	1. Support the configuration of WeChat templates,

	Templates	including official account template message templates
		and applet service message templates
		1. Edit email: support new email content, edit basic email information, and edit content with editor
	Email Templates	<ol> <li>Sending emails: support test sending and marketing campaign triggers, sending emails</li> <li>Data viewing: data recording of sent emails: number of sent, number of delivered, number of users who</li> </ol>
		opened the email, number of users who clicked on the link
	SMS	1. Support recording SMS records;
	Records	
	Email	1. Support recording WeChat message records;
	Templates	
	Wechat	1. Support recording email message records;
	Records	
	Variables	1. Custom variable name
Orders		1. Process external channels such as POS, official
		website, WeChat official account, applet, Tmall,
	orderss	Meituan, Dianping, etc., through the system
	0100135	application API layer, complete transmission of
		member orders data into the system, manage orders,
		orders details, orders payment, orders discount;
	Store	1. Provide store list filtering based on store attributes;
	groupss	
	Stores	1. The system provides a standard interface to connect
		to external system store records
	Product	1. Provide product list filtering based on product
	Groups	attributes;

	Pro	1. The system provides a standard interface to connect
	duct	to the commodity classification records of the external
	Product	system;
	Categories	
	Droducto	1. The system provides a standard interface to connect
	Products	to external system commodity records;
	Payment	1. The system provides a standard interface to connect
	Methodss	to external system Payment Methods records;
Settings		1. The system provides system user role permission
		control, which is divided into users and roles. The
	Custom	menu and button permissions are defined through
	System	roles, and users are granted through roles, so that
	Roles	users have permissions corresponding to the roles, and
		can operate the system according to the permissions
		definition;
	System Accounts	1. Create a system business account, assign role
		permissions to the system account, so that the system
		account has the permissions corresponding to the role,
		and can operate the system according to the
		permission definition;
Data asset	Data	1. Multi-channel data access: support multi-brand,
managem	access	multi-channel, and multi-access mode
ent (data-	Data	1. Supports data burying points for multiple terminals,
based	buried	and also supports timing data synchronization mode
services)	point	to access data
		1. One ID: users integrate multi-brand and multi-
	Une ID	channel ID to form a group ID/external Open ID
		1. Analytics dimension definition, fact data definition,
	Metadata	and the definition result is used for customer
		segmentation

	SQL	1. Provide analysts with Analytics capabilities through
	analysis	SQL API
	Data	1. Provide marketing list information and individual
	Dala	customer information to third-party systems through
	ουιρυι	API callbacks

## NEW FUNCTION

- V1.1 version Published April 16, 2021
- Support multi-tenant mode, that is, support the same set of micro-service architecture to meet the access needs of different users at the same time, distinguish and store data into the database of the corresponding tenant through the tenant ID, to achieve the isolation of different user data;

## • V1.2 version Published May 31, 2021

- 1) New coupon types: full discount coupons, redemption coupons, discount coupons Click the corresponding type to add coupons and edit rules
- 2) Added data dashboard, coupon data: inventory, number of people receiving, number of users, number of new buyers, number of old customers, ROI
- 3) New coupon rules configuration, you can configure information: coupon name, inventory, Loyalty Configuration, cost center, cost, usage threshold, discount content, distribution form, usage instructions, usage rule validity period, available time, use store, Use of goods, refunds and coupons, stacking restrictions
- 4) Coupon rules list, click to view, enter the details, you can operate on and off shelves, approve, edit, delete
- 5) New preview function, edited content can be directly previewed and viewed
- 6) Added an approval process, you can create a new coupon rule, and designate a person to approve; (The D365 version provides an approval task workflow)
- 7) Add a new issuance process. When the coupon rules are in progress and the inventory is found to be insufficient, you can add additional inventory
- 8) Coupon basic rule configuration: support coupon transfer, you can configure whether it can be transferred, and set the validity period for receiving the coupon
- V1.3 version Published June 17, 2021

- 1) Provide marketing automation capabilities: marketing campaign canvas, marketing campaign engine, marketing campaign node effect analysis
- 2) Marketing activity canvas: Provide user groups, behavior monitoring, rewards (points, coupons), messages (SMS, WeChat), A\B Test, time conditions and other components, support free combination of drag and drop or click to design the activity process
- 3) Marketing campaign engine: Building a marketing campaign engine based on big data to achieve multi-wave, timing\real-time marketing campaign triggering
- 4) Marketing activity node effect analysis: display the effect analysis of the number of activity triggers, conversion rate, etc. at each activity node

## • V1.4 version Published July 16, 2021

- 1) Basic points rules: Configure basic points rules: optimize the validity period of points, add discount restrictions
- 2) Promotional points rules: New configuration of promotion points rules; support for review, listing, and delisting of rules; new calculation engine for promotion points rules

## • V1.4.1 version Published August 13, 2021

- 1) New tags support 4 types of tags: custom tags, preference tags, static tags, and SQL tags
- Custom labels: Classify labels by customizing label values, and customize label value calculation rules according to user attributes and behaviors;
- Preference tags: Filter out users who meet the tag rules through events, and use the user's event attribute ranking as the tag value;
- Static labels: classify labels by customizing label values, and provide open interfaces to provide unified label services for third-party systems such as customer service and shopping guides;
- SQL label: Customize label calculation rules by writing SQL statements, and use the result returned by the SQL statement as the label value.
- 2) Label analysis: The system provides viewing the label value distribution data after 30 updates in history
- 3) Label update function: The system provides the function of regularly updating labels and manually updating labels.
- 4) Label enablement: The system provides the function of enabling the label. After enabling the label, the label can be updated regularly and manually;
- 5) Disable function: The system provides the function of disabling the label. After disabling the label, the label will not be updated regularly.

6) New/edit label grouping: The system supports grouping labels.

## • V1.5 version Published August 19, 2021

- 1) Support configuration of Messaging template: domestic SMS, international/Hong Kong, Macao and Taiwan SMS, Email Templates
- 2) Support for editing the real-time preview of the content of the message template
- 3) Support the SMS configuration of the marketing center, the system will call different interfaces of the SMS platform for SMS reach according to different SMS template types
- Support the message email configuration of the marketing center, the system will call different interfaces of the email platform to reach the email according to different Email Templates types

## • V1.5.1 version Published September 17, 2021

- 1) Group types are divided into dynamic user groups and static user groups
- 2) Dynamic user group: support regular update and manual update
- 3) Static user group: The group will only be updated once when the group is created, and then it does not support scheduled update and manual update.
- 4) Group creation methods are divided into rule configuration and list import methods
- 5) Rule configuration: filter users through their attributes, tags, and behaviors.
- 6) List import: filter users in the form of Excel import
- 7) Update function: dynamic user groups support manual update and automatic update
- 8) Enable group: After the group is enabled, the dynamic user group supports automatic update and manual update, and supports the selected group for marketing activities
- 9) Generate Personas: After the Personas is generated, support to view the Personas of the user group
- 10) Copy group: support users to copy successfully created groups
- 11) Preview the number of people in the group: create a group by setting rules, support previewing the number of people in the group
- 12) In the crowd filter, the target group is added to the configuration items that belong to/not belong to

## FUNCTION ENHANCEMENT

- V1.1 version Published April 16, 2021
  - Techsun UI optimization, unifying UI styles and specifications, and optimizing user experience;
  - The front-end operation interface of Techsun Social Hub for Application (formerly Social Hub) and Techsun Social Hub for Data (formerly Data Now) are unified and displayed through the function permission control menu;

## **BUG FIXES**

- V1.1 version Published April 16, 2021
  - Set basic points rules according to different levels, and fix the problem of precise level control;
  - Fixed the issue of refund points account update;
  - Fixed the issue of the validity period of the membership level rules;
  - Multiple loyalty management under one tenant, code uniqueness control problem fixed;
- V1.2 version Published May 31, 2021
  - without
- V1.3 version Published June 17, 2021
  - without

## 3. ADMINISTRATOR GUIDE

## APPLY FOR FREE TRIAL

Applications for demo or trial products are supported via Techsun's website: https://www.techsun.com/en/home.html



## SYSTEM INITIALIZATION

- 1. Need to configure loyalty program;
- 2. Need to configure grade;
- 3. Need to configure grade update rule;
- 4. Need to configure points group;
- 5. Need to configure cost center;
- 6. Need to configure basic point rule;
- Need to classify products, product record, store record Payment Methods synchronized to Social Hub;
- 8. Need to configure common user & role permission: The following lists the role rights for common users :

Table Name	New Permission	Query Permission	Edit Permission	Delete
				Permission
Loyalty Program		~		
Grade		~		

Grade Update Rule	~	
Points Group	<b>v</b>	
Cost Center	<b>v</b>	
Basic Points Rule	<b>v</b>	
Product Category	<b>v</b>	
Product Record	<b>v</b>	
Store Record	<b>v</b>	
Payment Methods	<b>v</b>	

## 4. BUSINESS USER GUIDE

## Overview

Describes the functions of each Social Hub system module from the operational level, convenient for business users to understand and operate.

## LOYALTY CONFIGURATION

## • What is Loyalty Configuration?

For brand clients, rules and regulations of each brand has its unique, loyalty schemes are to meet different client's brand can use their membership rules and rule configuration initialized into the system and function modules, it includes the level configuration, down-grade run rule configuration, point account types (point) configuration, cost center configuration.

#### • Configure membership loyalty programs

#### **Function description:**

1) Loyalty program name: support custom club code (system control code unique), loyalty name (brand membership system name);

#### Step 1: Log in to the system using the assigned account

<b>Techsun</b>		<b>⊕</b> US ∨	
	Welcome to Techsun		
	Password login Verification code login		
	* E-mail		
	Please enter your email		
	* Password Please enter 8-16 digits and letters (case sensitive)		
	Forgot the password		
	Log In		
	i nare read and agreed to the Finally Policy		

Step 2: Select the menu bar [Membership]  $\rightarrow$  [Loyalty Configuration] to enter the loyalty program view interface

Techsun					Alevin v
A Home	Loyalty Program	as Point Group Cost Center			
Analytics					+ Create
육 Customers					
i Membership	Loyalty Program Name	Loyalty Program ID	Number of Members	Creation Time	Operation
Members	MBrand Loyalty	TechsunSocialhub-UI-TENCENT	257	02/11/2021 2:16 PM	Edit Delete
Points				Total 1 pie	ce(s) of data < 1 > 30 / page >
Basic Points Rules					
Promotion Points					
Loyalty Configur					
14 Marketing					
El Coupons					
Messaging					
Corders					
A Settings					

Remarks: 1) Support search by club name;

Step 3: Click the "Create" button

Techsun					Alevin v
Home Analytics Customers	Loyalty Program Tier Tier Ru	ules Point Group Cost Center			+ Create
i Membership	Loyalty Program Name	Loyalty Program ID	Number of Members	Creation Time	Operation
Members	MBrand Loyalty	TechsunSocialhub-UI-TENCENT	257	02/11/2021 2:16 PM	Edit Delete
Points				Total 1 piec	e(s) of data < 1 > 30 / page >
Basic Points Rules Promotion Points					
Loyalty Configur					
間 Marketing					
E3 Coupons					
Messaging					
Corders					
<u>角</u> Settings					
=					

Step 4: After entering specific information on the created page, click Save

Techsun		Alevin v
	Home > Membership > Loyolty Configuration > Loyolty Program > Create	
Analytics	Basic Info	
糸 Customers		
2 Membership	Loyalty Program ID: Place enter     Iovalty Program Name: Place enter	
Members		
Points		
Basic Points Rules		
Lovalty Configur.		
Narketing		
Coupons		
Messaging		
G Orders		
A Settings		
-	Cancel Save	

Step 5: Complete the loyalty program creation

Techsun					Alevin v
<ul> <li>Home</li> <li>☑ Analytics</li> <li>④ Customers</li> </ul>	Loyalty Program Tier Tier Rule	es Point Group Cost Center			+ Create
· Membership	Loyalty Program Name	Loyalty Program ID	Number of Members	Creation Time	Operation
Members	MBrand Loyalty	TechsunSocialhub-UI-TENCENT	257	02/11/2021 2:16 PM	Edit Delete
Points				Total 1 pie	ce(s) of data < 1 > 30 / page >
Basic Points Rules Promotion Points					
Loyalty Configur					
14 Marketing					
E3 Coupons					
Messaging					
A Settings					
-					

#### Remarks:

1) When the user role rights are initialized, it needs to be controlled. For the [loyalty program] table, the user only needs to keep

- 2) Query permission;
- Configuration Tier

#### **Function description:**

- 1) Social Hub supports multiple membership levels within each loyalty program;
- Grade definition: including grade code, grade name, basic grade (yes \ no), grade order, grade validity type (fixed date, fixed period), fixed date needs to be set: validity period (X) year, month, date; For a fixed period, set the following parameters: Validity period (X) days;

# Step 1: Select the menu bar [Membership] $\rightarrow$ [Loyalty Configuration] $\rightarrow$ [Tier] to enter the grade view interface

Techsun													Alevin
	Loyalty Program	Tier	Tier Rules	Point Group	Cost Center								
Analytics													L cum
条 Customers													- Croun
· Membership	Name	Loyalty Prog	gram	Tier ID	Tier Order	Basic Tier	Tier Validity Type	Validity(x) Day(s)	Validity(x) Year(s)	Month	Date	Creation Time	Operation
Members	Diamond ca d member	MBrand Loy	alty	level_3	3	No	Fixed Cycle	365				02/11/2021 2:24 PM	Edit Delete
Points	Platinum ca d member	MBrand Loy	alty	level_2	2	No	Fixed Cycle	365				02/11/2021 2:23 PM	Edit Delete
Basic Points Rules	Gold card me	e MBrand Loy	alty	level_1	1	No	Fixed Cycle	365				02/11/2021 2:23 PM	Edit Delete
Loyalty Configur	Cord member	<sup>0</sup> MBrand Loy	alty	level_0	0	Yes						02/11/2021 2:22 PM	Edit Delete
Marketing											Total 4	piece(s) of data < 🚺	> 30 / page
Coupons													
Messaging													
G Orders													
ft Settings													

Remarks:

1) Support search by grade name;



## Step 2: Click the "Create" button

Step 3: After entering the specific information on the created page, click Save

Techsun						Alevin V
A Home	Home > Membership > Loyalty C	Configuration > Tier > Create				
Analytics	Basic Info					
条 Customers						
🕸 Membership	Loyalty Program :	Please enter members V				
Members	* Tier ID:	Please enter				
Points	* Name:	Please enter				
Basic Points Rules	* Tier Order:	0				
Promotion Points	• Basic Tier:	No V				
Loyalty Configur	<ul> <li>Tier Validity Type:</li> </ul>	Please select v				
Narketing						
Coupons						
Messaging						
Orders						
<b>胎</b> Settings						
:=			Cancel	Save		

Step 4: Complete tiers creation

Techsun													Alevin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Loyalty Program	Tier	Tier Rules	Point Group	Cost Center								
条 Customers													+ Create
Membership	Name	Loyalty Pro	ogram	Tier ID	Tier Order	Basic Tier	Tier Validity Type	Validity(x) Day(s)	Validity(x) Year(s)	Month	Date	Creation Time	Operation
Members	Diamond car d member	MBrand La	yalty	level_3	3	No	Fixed Cycle	365				02/11/2021 2:24 PM	Edit Delete
Points	Platinum car d member	MBrand Lo	walty	level_2	2	No	Fixed Cycle	365				02/11/2021 2:23 PM	Edit Delete
Basic Points Rules	Gold card me mber	MBrand La	alty	level_1	1	No	Fixed Cycle	365				02/11/2021 2:23 PM	Edit Delete
Loyalty Configur	Card member	MBrand La	ayalty	level_0	0	Yes						02/11/2021 2:22 PM	Edit Delete
14 Marketing											Total 4	piece(s) of data < 1	> 30 / page ~
E3 Coupons													
Messaging													
G Orders													
A Settings													
-													

Remarks:

- 1) When initializing user role rights, you need to control user role rights. For the [Level] table, users only need to retain query rights.
- The upgrade and demotion rules are configured

#### **Function description:**

- 1) The Social Hub allows you to set up a hierarchy rule for each hierarchy;
- Definition of promotion and demotion rule: calculation period (the last X days), conditions required for promotion and demotion (accumulated points), which points in the bonus account can be configured to participate in the bonus rise and fall rule;

Step 1: Select the menu bar [Membership]  $\rightarrow$  [Loyalty Configuration] $\rightarrow$  [Tier Rules] to enter the rank promotion and demotion rule view interface

Techsun									Alevin v
<ul> <li>Analytics</li> </ul>	Loyalty Program	Tier <b>Tier Rules</b>	Point Group Cost (	Center					+ Create
Membership	Name	Loyalty Program	Tier Name	Tier Rules	Point Group	Accumulated Points Start	Accumulated Points End	Creation Time	Operation
Members	Diamond ca d promotion ules	r MBrand Loyalty	Diamond card me mber	Accumulated Points	Integral value	2000.01	999999999	02/11/2021 2:33 PM	Edit Delete
Points Basic Points Rules	Platinum ca d promotion ules	r MBrand Loyalty	Platinum card me mber	Accumulated Points	Integral value	1000.01	2000	02/11/2021 2:32 PM	Edit Delete
Promotion Points	Gold card pro motion rules	MBrand Loyalty	Gold card membe r	Accumulated Points	Integral value	500	1000	02/11/2021 2:31 PM	Edit Delete
Loyalty Configur								Total 3 piece(s) of data < 📋	> 30 / page ~
14 Marketing									
&3 Coupons									
Messaging									
Corders									
m settings									

Remarks:

1)

Supports searching by the name of a rank promotion or demotion.

## Step 2: Click "Create" button

Techsun										Alevin V
	Lovalty Program	Tier	Tier Pules	Point Group Cost	Center					
Analytics										
A Customers										+ Create
🕸 Membership	Name	Loyalty Pre	ogram	Tier Name	Tier Rules	Point Group	Accumulated Points Start	Accumulated Points End	Creation Time	Operation
Members	Diamond car d promotion r ules	MBrand La	yalty	Diamond card me mber	Accumulated Points	Integral value	2000.01	999999999	02/11/2021 2:33 PM	Edit Delete
Points Basic Points Rules	Platinum car d promotion r ules	MBrand La	yalty	Platinum card me mber	Accumulated Points	Integral value	1000.01	2000	02/11/2021 2:32 PM	Edit Delote
Promotion Points	Gold card pro motion rules	MBrand La	yalty	Gold card membe r	Accumulated Points	Integral value	500	1000	02/11/2021 2:31 PM	Edit Delete
Loyalty Configur									Total 2 piece(s) at data	1 20 / 10000
Marketing										ao / puge -
El Coupons										
Messaging										
G Orders										
A Settings										
=										

Step 3: After entering the specific information on the created page, click Save



Step 4: The grade update rule is created
Techsun							Alevin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Loyalty Program Tier Tier Rules	Point Group Cost Center					
务 Customers							+ Create
@ Membership	Name Loyalty Program	Tier Name Tier Rules	Point Group	Accumulated Points Start	Accumulated Points End	Creation Time	Operation
Members	Diamond car d promotion r MBrand Loyalty ules	Diamond card me Accumulated Points	Integral value	2000.01	999999999	02/11/2021 2:33 PM	Edit Delete
Points Basic Points Rules	Platinum car d promotion r MBrand Loyalty ules	Platinum card me Accumulated Points	Integral value	1000.01	2000	02/11/2021 2:32 PM	Edit Delete
Promotion Points	Gold card pro motion rules MBrand Loyalty	Gold card membe Accumulated Points	Integral value	500	1000	02/11/2021 2:31 PM	Edit Delete
Loyalty Configur						Total 3 piece(s) of data < 1	> 30 / page ~
14 Marketing							
E3 Coupons							
Messaging							
G Orders							
ft Settings							

#### Remarks:

1) When initializing user role rights, you need to control user role rights. For the Grade Update Rules table, users only need to retain query rights.

#### • Configure the point group (define the bonus point account type) type

#### **Function description:**

- 1) Social Hub supports setting up multiple points account types under each Loyalty Configuration, corresponding to the member's point account name, and the point group is linked to the member's point account.
- Social Hub provides the design of multiple points accounts of different types under one member account. The system automatically generates points accounts for members according to their configured points groups when they register for the membership.

## Step 1: Select the menu bar [Membership] $\rightarrow$ [Loyalty Configuration] $\rightarrow$ [Point Group] to enter the point group view interface

Techsun				Alevin v
<ul> <li>☑ Home</li> <li>☑ Analytics</li> <li>֎ Customers</li> </ul>	Loyalty Program Tier	Tier Rules Point Group Cost Center	и	+ Create
Membership	Name	Loyalty Program	Creation Time	Operation
Members	Integral value	MBrand Loyalty	02/11/2021 2:30 PM	Edit Delete
Points	growth value	MBrand Loyalty	02/11/2021 2:30 PM	Edit Delete
Basic Points Rules Promotion Points Loyalty Configur				Total 2 piece(s) of data < 1 > 30 / pagev
Marketing				
Corders				
=				

#### Remarks:

1) Support search by point group name;

Techsun				Alevin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Loyalty Program Tier	r Tier Rules Point Group C	Cost Center	- to and
유 Customers	Name	Loyalty Program	Creation Time	Operation
Members	Integral value	MBrand Loyalty	02/11/2021 2:30 F	PM Edit Delete
Points	growth value	MBrand Loyalty	02/11/2021 2:30 F	PM Edit Delete
Basic Points Rules Promotion Points				Total 2 piece(s) of data < 1 > 30 / page <
Loyalty Configur				
₩ Marketing				
Messaging				
Conders				
ш setungs				

#### Step 2: Click "Create" button

Step 3: After entering the specific information on the created page, click Save

Techsun		AIDVIII V
	Home > Membership > Loyalty Configuration > Point Group > Create	
Analytics	Basic Info	
용 Customers ⓒ Membership	• Loyalty Program: Peose enter members	
Members	Norme: Please enter	
Points		
Basic Points Rules		
Promotion Points		
Loyalty Configur		
Narketing		
El Coupons		
Messaging		
Corders		
<b>胎</b> Settings		
=	Concel	

Step 4: Complete the point group creation

Techsun				Alavin v
<ul> <li>Generation</li> <li>Generation</li></ul>	Loyalty Program Tier	Tier Rules Point Group Cost Center		+ Creote
용 Customers 영 Membership	Name	Loyalty Program	Creation Time	Operation
Members	Integral value	MBrand Loyalty	02/11/2021 2:30 PM	Edit Delete
Points	growth value	MBrand Loyalty	02/11/2021 2:30 PM	Edit Delete
Basic Points Rules Promotion Points Loyalty Configur				Total 2 piece(s) at data < 1 > 30 / page <
14 Marketing				
E3 Coupons				
Messaging				
Corders				
ft Settings				
Remarks:				

1) When the user role rights are initialized, the user role rights need to be controlled. For the [point group] table, the user only needs to retain the query rights.

#### • Configure the cost center

#### **Function description:**

- 1) Support the establishment of multiple cost centers under each Loyalty Configuration;
- 2) The function of the cost center is as follows: after the definition of the cost center, every cost-related campaign will be associated with a cost center, and the point flow generated based on the campaign will be associated with the cost center to meet the cost ownership statistics of the subsequent integration.

Step 1: Select the menu bar [Membership]  $\rightarrow$  [Loyalty Configuration] $\rightarrow$  [Cost Center] to enter the cost center view interface

Techsun				Alevin v
@ Home ☑ Analytics 원 Customens	Loyalty Program Tier Tier Rules	Point Group Cost Center		+ Create
영 Membership	Name	Loyalty Program	Creation Time	Operation
Members	Promotion cost	MBrand Loyalty	02/11/2021 2:34 PM	Edit Delete
Points				Total 1 piece(s) of data < 1 > 30 / page >
Basic Points Rules				
Loyalty Configur				
14 Marketing				
El Coupons				
Messaging				
Corders				
A Settings				

Remarks:

1) Support search by cost center name;

#### Step 2: Click "Create" button

Techsun				Alevin v
습 Home 교 Analytics	Loyalty Program Tier Tier Rules Po	int Group Cost Center		
유 Customers 영 Membership	Name	Loyalty Program	Creation Time	Operation
Members	Promotion cost	MBrand Loyalty	02/11/2021 2:34 PM	Edit Delete
Points Basic Points Rules				Total 1 piece(s) of data < 1 > 30 / page <
Promotion Points				
Loyalty Configur				
₩ Marketing				
E Coupons				
Messaging				
G Orders				
<u>角</u> Settings				

Step 3: After entering the specific information on the created page, click Save

Techsun				Alevin v
	Home > Membership > Loyalty Configuration > Cost Center	r > Create		
Analytics	Basic Info			
条 Customers				
2 Membership	Loyalty Program: Please enter members	×		
Members	* Name: Please enter			
Points				
Basic Points Rules				
Promotion Points				
Loyalty Configur				
阳 Marketing				
E3 Coupons				
Messaging				
Orders				
A Settings				
=			Cancel Save	
Step 4: C	complete the creatio	n of the cost	center	
Techsun				Alevin V
<b>A</b> 11111				
W Home	Loyalty Program Tier Tier Rules Point Grou	p Cost Center		
Andiyucs				+ Create
A Customers	Name	Loyalty Program	Creation Time	Operation
	Prove the sect			
Members	Promotion cost	MBrand Loyalty	02/11/2021 2:34 PM	Edit Delote
Points				Total I piece(s) of data < 1 > 30 / page >
Basic Points Rules				

1) When user role rights are initialized, user role rights need to be controlled. For the [Cost Center] table, users only need to retain query rights.

Loyalty Cor Marketing Coupons Messaging Orders

Remarks:

### **5. ANALYTICS**

#### WHAT IS ANALYTICS

Based on Hadoop big data platform data warehouse technology , provide data visualization function;

#### OVERVIEW

#### **Function Description:**

- 1) Overview display: users, orderss, points, total points issued;
- 2) Users: Display the total number of users, the number of new users, the number of purchased users, and the number of active users;
- 3) orders: Display the overall orders amount, overall return amount, overall order number, and overall return order number;
- 4) Points: Display the current available points, expired points, distribution of points consumption, and distribution of new sources of points;
- 5) The total amount of points issued: the bar graph shows the changes in the total amount of points issued;

## Step 1: Select the menu bar [Analytics] $\rightarrow$ [Overview] to enter the overview view interface

	Techsun			Alevin 🗸
1	බ Home	Customer Yesterday v 02/12/2021		6
6	Analytics	Total Customers 💿	New Customers ®	
	Overview	17,782 YoY • 893.41%	<b>0</b> DoD • 0 %	
	Customers	Non-members, 34.27%	Non-members. 0.00% Members. 0.00%	
,	Orders	- Members, 65.3%		
	9 Momhorship			
,	a membership	Purchased Customers ③	Active Customers ③	
1	Marketing	7 The ratio of purchased customers 0.04 % DoD of purchased customers • 0 %	26 The ratio of active customers 0.15 % DoD of active customers • 0 %	
8	Coupons	Orders Vesterday v 02/12/2021		
t	Messaging			
t	Orders	Total Order Amount	Total Return Amount 💿	
ł	월 Settings	4,404 Yuan Dol * 0% Non-members, 0.81%	Non-members, 50.0% - Members, 50.0%	
		Total Orders @	Total Return Orders 💿	
		20 Orders boo = 0 %.	2 Orders Doo + 0%	
		Techsun Social Hub		

Techsun		Alevin ~	
ක Home	Customer vesterday v 02/12/2021		ß
Analytics	Yesterday Total Cust Recent 7 days	New Customers @	
Overview	17,78 Recent 30 Days	<b>0</b> DOD • 0 %	
Customers Orders	Recent 365 days Non-members, 3427% Members, 65.73%	Non-members, 0.00% - Members, 0.00%	
舟 Customers			
创 Membership	Purchased Customers @	Active Customers @	
贸 Marketing	7 The ratio of purchased customers 0.04 % DoD of purchased customers • 0 %	26 The ratio of active customers 0.15 % DoD of active customers + 0 %	
E Coupons	Orders vesterday v 02/12/2021		
Messaging	Total Order Amount @	Total Pature Amount @	
Crders	4,464 Yuan Dob * 0%	72 Yuan DoD + 0%	
췹 Settings	Non-members, 0.815.	Non-members, 50.00%	
	Total Orders 💿	Total Return Orders 💿	
	20 Orders DoD + 0 %	2 Orders DoD + 0 %	
=	Nan-members. 5.00%	Kon-meniterer VA1000	

Step 2: Click the [Yesterday] button to support date filtering

 The date of the user supports the screening of yesterday, the last 7 days, the last 30 days, and the last 365 days; the date of orderss and points supports the screening of yesterday, the last 7 days, the last 30 days, the last 365 days, and this year;

## Step 3: Click [Day], [Month], [Year], [Fiscal Year] button to support day, month, year, and fiscal year filtering

Techsun		Alevin v
<ul><li>ᢙ Home</li><li>➢ Analytics</li></ul>	. Members, 15.0%	Non-members, 50.00% - Members, 50.00%
Overview	Delete	
Customers	Points Vesterday v 02/12/2021	
Orders	Usable Points	Expired Points 02/12/2021 Total
条 Customers	4,815 Deduct 4835 Yuan	409 Deduct 4.08 Yuan
创 Membership	Distribution of Points Consumption ®	Distribution of New Points Sources @
🕅 Marketing		tpp, 21.88%
E Coupons	rcp, 35.34% — bpg, 34.88%	- crucac, 17,49%
Messaging	bri, 29.78%	tig. 21.62%
Orders		
船 Settings	Total Issued Points ( Corr Month Year Flacel Year	
	1000 950	936 967
	791 817	651
	500	
	0	
	26/11/2021 27/11/2021 28/11/2021	29/11/2021 30/11/2021 01/12/2021 02/12/2021

Step 4: Click the [Download] button to support data download

Techsun			Alevin $\vee$
	Customer Vesterday v 02/12/2021		ß
Analytics	Total Customers 💿	New Customers (9)	
Overview	17,782 YoY • 893.41 %	0 DOD • 0%	
Customers Orders	Non-members, 3427% — — Members, 65.73%	Non-members, 0.00% - Members, 0.00%	
A Customers			
窗 Membership	Purchased Customers (0)	Active Customers @	
词 Marketing	7 The ratio of purchased customers 0.04 % DoD of purchased customers 🔺 0 %	26 The ratio of active customers 0.15 % DoD of active customers <b>*</b> 0 %	
Coupons	Orders vesterday v 02/12/2021		
Messaging	Total Order Amount	Total Return Amount (0)	
G Orders	4,464 Yuan DoD = 0 %	72 Yuan Doo + 0%	
的 Settings	Non-members. 0.01%	Non-members. 50.00% Members, 50.00%	
	Total Orders 💿	Total Return Orders 💿	
100 100	20 Orders DoD * 0%	2 Orders Doo + 0%	

Step 5: Click the [Share] button to support page sharing, and the link can be pasted after copying successfully

Techsun		Copy successfully	Alevin V
Home     Analytics	Customer vesterday v 02/12/2021	Share link ×	3
Overview	Total Customers ⊙ 17,782 YoY ★ 893.41%	© Successfully created link	
Customers Orders	Nor-members. 34.27%	https://soos2030.tachsun.com/cdp/uploadeview/1638502436235bl Cancel One-click.copy	
条 Customers	-		
聞 Marketing	Purchased Customers ③ <b>7</b> The ratio of purchased customers 0.04 % DoD of purchased customers 0.04 %	Active Customers	
Coupons	Orders Yesterday v 02/12/2021 👲		
Orders	Total Order Amount ⊙ 4,464 Yuan DoD + 0 %	Total Return Amount © <b>72</b> Yuon DoD ★ 0%	
ni settings	0	Non-members. 50.00% - O-Members. 50.00%	
	Total Orders © 20 Orders DoD + 0% Non-members, 500%	Total Return Orders ⊕ 2 Orders coo + 0%	
:=		Non-member 50.00% Howker 50.00%	

C saas2030.techsun.com/cdp/uploadeview/1638502436235blob.png	\$ * a
Customer yesterday v 02//2/2021	
Total Customers <b>17,782</b> vov <b>883.41 x</b> Non-members. 34275	New Customers D DoD 0% Non-members, 0.00% Members, 0.00%
Purchased Customers 7 The ratio of purchased customers 0.04 % DoD of purchased customers 0.1%	Active Customers 26 The ratio of active customers 0.15 % DoD of active customers 0.%
Orders vesterilay v 02/12/2021	
Total Order Amount 4,464 Yuan Doo 0% Non-members, 0.81% Members, 90.19%	Total Return Amount 72 Yuan bol 0%
Total Orders 20 orders boo on Total remembers, 50%	Zorders pop o's

1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

#### CUSTOMERS

#### **Function Description:**

- 1) Customers display: user overall analysis, user activity analysis, user retention analysis;
- 2) Overall analysis of users: display the total number of users, member Personass, the number of new members of each channel & the year-on-year growth rate;
- 3) User activity analysis: display the number of active users in each channel, the proportion of users in each channel, the number of active members in each channel, and the proportion of members in each channel;
- 4) User retention analysis: user retention rate, user silence rate;
- Overall analysis of users

Step 1: Select the menu bar [Analytics] $\rightarrow$ [Customers] $\rightarrow$ [Overall Customer Analytics] to enter the user overall analysis view interface

Techsun		Alevin $\vee$
ය Home	Overall Customer Analytics Customer Activity Analytics Customer Retention Analytics	
Analytics	Total Customers 🕘 🛛 🔨 Flocal Year	ß
Overview	Non-members Members Total Customers — Linear (the number of members)	
Customers		
Orders	1.78w	
条 Customers	1.170	
ම Membership	1000 300 3334 4734 6094	
阿 Marketing		
E Coupons	0 2017 2018 2019 2020 2021	
🖾 Messaging	Member Portrait 👱	
G Orders	Gender Distribution of Members Age Distribution of Members Tier Distribution of Members	
船 Settings	unknown, 758% Unknown, 000% (18-29), 15.85% Silver member, 24.72% Gold member, 24.72%	25.12%
	male. 48.92% [40-40], 18.39% [50-40], 12.64% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.99\% [51-40], 10.9\%[51-40], 10.9\%	24.40%
	New Members in Each Channel & YoY Growth Rate 💿 📴 Month Year Flace/Year Channel: ALL > + 6 🗴	
:=	a.com a offine a offine a thai a total a vechat	

Step 2: Click [Day], [Month], [Year], [Fiscal Year] buttons to support day, month, year, and fiscal year filtering

Techsun			Alevin 🗸
မ် Home	Overall Customer Analytics Customer Activity Analytics Customer R	stention Analytics	
Analytics	Total Customers 🛛 🛛 🛛 🕹		œ
Overview	Non-members Members Total Customers — Linear (the number of members)		
Customers			
Orders	15000		1.78w
糸 Customers	10000	2019 Non-members: 0	
窗 Membership	5000	Members: 0     Total Customens: 0	3534 4734 6094
词 Marketing	0 0 0 0 0	O     Linear (the number of members): 0	
☑ Coupons	2017 20	18 2019	2020 2021
Messaging	Member Portrait 👱		
Orders	Gender Distribution of Members	Age Distribution of Members	Tier Distribution of Members
屳 Settings	uritrour, 7.595 	Unknown, 0.00%	Silver member, 24.72% Gold member, 25.12%
	New Members in Each Channel & YoY Growth Rate 🛛 🗾		
	🔳 .com 🔳 offline 📕 others 🔳 tmall 🔳 total 📕 wechat		

Step 3: Click the [Channel] filter box to support channel filtering



Step 4: Click the [Download] button to support data download

Techsun				Alevin v
မ် Home	Overall Customer Analytics Customer Activity Analytics Customer Re	tention Analytics		
Analytics	Total Customers 🛞 Vear Fiscal Year			2
Overview	Non-members Members Total Customers — Linear (the number of members)			
Customers				
Orders	15000		1.78w	
A Customers	1000		1.17w	
创 Membership	5000		3534 4734 6094	
🕅 Marketing	0 0 0 0 0	0 0 0 0	200	
Coupons	2017 201	18 2019	2020 2021	
Messaging	Member Portrait 👱			
Orders	Gender Distribution of Members	Age Distribution of Members	Tier Distribution of Members	
🛍 Settings	unknoom, 7.59% — female, 43.50%	Unknown, 0.02% <18, 3.7% (45+, 28.0%) — [0-25], 15.85% — [05-30], 11.52% — [0-35], 12.0%	Silver member. 2472% Gold member.	25.12%
		(40-45), 18.39% [35-40], 10.99%	Bronze member, 23,76%	24.40%
	New Members in Each Channel & YoY Growth Rate 💿 🛛 🕞 🗤 🖉	Month Year Fiscal Year Channel: ALL × + 6	]	
	com filine there that we had			

Step 5: Click the [Share] button to support page sharing, and the link can be pasted after copying successfully

Techsun		Copy successfully	Alevin v
ය Home	Overall Customer Analytics Customer Activity Analytics	Customer Retention Analytics	
Analytics	Total Customers ③ Year Fiscal Year 🛓	Share link X	
Overview	The sector of Market and Table Category I have been	Successfully created link	
Customers	Non-memoris memoris for four customers — ones (or nome	https://saas2030.techsun.com/cdp/uploadeview/1638502735443bl	
Orders		Capcel	1.78w
条 Customers	15000	Concerne units copy	1.17w
හි Membership	10000		4734 6094
🕅 Marketing	5000 0 0	0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0 0	3534
Coupons		2018 2019	2020 2021
Messaging	Member Portrait 🞍		
G Orders	Gender Distribution of Members	Age Distribution of Members	Tier Distribution of Members
船 Settings	unknown, 7.58%	Unknown, 0.00% [18-25], 15.85%	
	-female, 43.50%	<18, 3.17% J [45+. 28.05% [25-30], 11.52%	Silver member, 24.72%
	male, 48.92%	B0.35, 12045	
		[40-45], 18.39% [35-40], 10.99%	Bronze member, 25.76%
	New Members in Each Channel & YoY Growth Rate	Day Month Year Fiscal Year Channel: ALL × + 6	*
	s com s offine s others s tmall s total s werkat		
₩ → C	30.techsun.com/cdp/uploadeview/1638502735443blob.png		\$ <b>\$</b> 3
Overali Cu	stomer Analytics Customer Activity Analytics Customer R	stantion Analytics	
Total Cu			
Totalea	Hiscol Year		
Non-me	mbers  Members Total Customers — Linear (the number of members)		
			1.78w
150	00		1.17w
100	00		6094
50	00		3534 4734
	0 - 2017 20	18 2019	2020 2021
Member	Portrait		
Gender	Distribution of Members	Age Distribution of Members Unknown, 0.00%	Tier Distribution of Members
		<18, 3.17% [18-25], 15.85%	Silver member, 24.72% Gold member, 25.12%
	- female, 43.50%	-[25-30), 11.52%	
	male. 48.92%	(40-45), 18.39% [30-35], 12.04%	Bronze member, 25.76%
New Mor	mbers in Fach Channel & YoY Growth Rate	Month Year Secol Year Channel' ALL	
New Mer	boy		
.com	offline others trmall total vechat		
	ля		

- 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;
- User activity analysis

# Step 1: Select the menu bar [Analytics]→[Customers]→[Customer Activity Analysis] to enter the user activity analysis view interface



Step 2: Click [Day], [Month], [Year], [Fiscal Year] buttons to support day, month, year, and fiscal year filtering



Step 3: Click the [Channel] filter box to support channel filtering



## Step 4: Click the [Download] button to support data download



Step 5: Click the [Share] button to support page sharing, and the link can be pasted after copying successfully



- 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;
- User retention analysis

# Step 1: Select the menu bar [Analytics]→[Customers]→[Customer Retention Analysis] to enter the user retention analysis view interface

Techsun											Alevin
A Home	Ove	erall Customer Analytics Cust	omer Activity Analytics	Customer Rete	ention Analytics						
Analytics	Cu	istomer Retention Rate 💿	New Members Over	all Active Members	Week Month	Channel: ALL	✓ Age:	ALL	* ±		
Overview	Ŀ	0%-20% 20%-40% 40%	-60% 🔳 60%-80% 📕	80%-100%							
Customers		Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
Orders		2021-10-11 ~ 2021-10-17	360	51.67%	16.39%	26.39%	11.94%	1.67%	4.17%	0%	-
A Customers		2021-10-18 ~ 2021-10-24	332	25.6%	25%	14.76%	12.95%	1.81%	0%	-	-
窗 Membership		2021-10-25 ~ 2021-10-31	339	19.17%	4.13%	4.13%	2.65%	0%	-	-	-
Marketing		2021-11-01 ~ 2021-11-07	314	10.83%	0%	0%	0%	-	-	-	-
Coupons		2021-11-08 ~ 2021-11-14	297	11.45%	0%	0%	-	-	-	-	-
Messaging		2021-11-15 ~ 2021-11-21	323	10.53%	0%	-	-	-	-	-	-
Corders		2021-11-22 ~ 2021-11-28	233	0%	-	-	-	-	-	-	-
the Contribution		2021-11-29 ~ 2021-12-05	0	-	-	-	-	-	-	-	
<u>n</u> settings	Cu	ustomer Sleeping Rate @	New Members Chara	Active Members	Week Month	Channel: All	× Ane: A		Ţ		
		atomiei eisephilig kute 0			monut	onomion	ngoi P				
		0%-20% 20%-40% 40%-	-60% 📕 60%-80% 📕	80%-100%							
		Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
		2021-10-11 ~ 2021-10-17	360	48.33%	83.61%	73.61%	88.06%			100%	100 C
		2021-10-18 ~ 2021-10-24	332	74.4%	75%				100%	÷	-
		2021-10-25 ~ 2021-10-31	339	80.83%				100%	-	-	-
		2021-11-01 ~ 2021-11-07	314	89.17%	100%	100%	100%	-	-	-	-

Step 2: Click [Week], [Month] button to support week and month filtering

Techsun										Ale
Home	Overall Customer Analytics	Customer Activity Analytics	Customer Ret	tention Analytics						
Analytics	Customer Retention Rate	New Members Ove	arall Active Members	Week Month	Channel: ALL	* Age:	ALL	• •		
Overview	0%-20% 20%-40%	40%-60% 60%-80%	80%-100%							
ustomers	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
ders	2021-10-11 ~ 2021-10-17	360	51.67%	16.39%	26.39%	11.94%	1.67%	4.17%	0%	-
stomers	2021-10-18 ~ 2021-10-24	332	25.6%	25%	14.76%	12.95%	1.81%	0%	-	-
embership	2021-10-25 ~ 2021-10-31	339	19.17%	4.13%	4.13%	2.65%	0%	-	-	-
irketing	2021-11-01 ~ 2021-11-07	314	10.83%	0%	0%	0%	-	-	-	-
oupons	2021-11-08 ~ 2021-11-14	297	11.45%	0%	0%	-	-	-	-	-
essaging	2021-11-15 ~ 2021-11-21	323	10.53%	0%	-	-	-	-	-	-
ders	2021-11-22 ~ 2021-11-28	233	0%	-	-		-	-	-	-
ttipge	2021-11-29 ~ 2021-12-05	0	-	-	-	-	-	-	-	-
tungo	Customer Sleeping Rate	New Members     Over	all Active Members	Week Month	Channel: ALL	* Age:	ALL	¥		
	0%-20% 20%-40%	40%-60% 60%-80%	80%-100%							
	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
	2021-10-11 ~ 2021-10-17	360	48.33%	83.61%	73.61%	88.06%			100%	
	2021-10-18 ~ 2021-10-24	332	74.4%	75%				100%	÷	-
	2021-10-25 ~ 2021-10-31	339	80.83%				100%		-	-
	2021-11-01 ~ 2021-11-07	314	89.17%				-	-	-	-

Step 3: Click the [New Member], [Overall Active Member] button to support the screening of new members and overall active members

Techsun										Alevin
ක Home	Overall Customer Analytics Cus	stomer Activity Analytics	Customer Rel	ention Analytics						
Analytics	Customer Retention Rate 💿	New Members Ov	erall Active Members	Week Month	Channel: ALL	* Age:	ALL	* 4		
Overview	0%-20% 20%-40% 40%	-60% 60%-80%	80%-100%							
Customers	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
Orders	2021-10-11 ~ 2021-10-17	360	51.67%	16.39%	26.39%	11.94%	1.67%	4.17%	0%	-
舟 Customers	2021-10-18 ~ 2021-10-24	332	25.6%	25%	14.76%	12.95%	1.81%	0%	-	-
窗 Membership	2021-10-25 ~ 2021-10-31	339	19.17%	4.13%	4.13%	2.65%	0%	-	-	-
Marketing	2021-11-01 ~ 2021-11-07	314	10.83%	0%	0%	0%	-	-	-	-
Coupons	2021-11-08 ~ 2021-11-14	297	11.45%	0%	0%	-	-	-	-	-
Messaging	2021-11-15 ~ 2021-11-21	323	10.53%	0%	-	-	-	-	-	-
Orders	2021-11-22 ~ 2021-11-28	233	0%	-	-	-	-	-	-	-
d	2021-11-29 ~ 2021-12-05	0	-	-	-	-	-	-	-	-
m serungs	Customer Sleeping Rate ()	New Members Over	all Active Members	Week Month	Channel: ALL	* Age:	ALL	•		
	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
	2021-10-11 ~ 2021-10-17	360	48.33%	83.61%	73.61%	88.06%	98.33%	95.83%	100%	1. Sec. 1. Sec
	2021-10-18 ~ 2021-10-24	332	74.4%	75%	85.24%			100%	1. Sec. 1. Sec	-
	2021-10-25 ~ 2021-10-31	339	80.83%	95.87%			100%	-	-	-

Step 4: Click [Channel], [Age] filter box, support channel, age combination filter

Techow										
Techsun										Ale
Home	Overall Customer Analytics Cu	stomer Activity Analytic	s Customer Re	tention Analytics						
Analytics	Customer Retention Rate 💿	New Members Ov	erall Active Members	Week Month	Channel: ALL	۰ Age:	ALL	* <u>*</u>		
Overview	0%-20% 20%-40% 40	%-60% 📕 60%-80%	80%-100%				ALL <18			
Customers	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	≥18<25	Veeks Later	7 Weeks Later	8 Weeks Later
Orders	2021-10-11 ~ 2021-10-17	360	51.67%	16.39%	26.39%	11.94%	≥25<30	7%	0%	
Customers	2021-10-18 ~ 2021-10-24	332	25.6%	25%	14.76%	12.95%	≥35<40		-	-
Membership	2021-10-25 ~ 2021-10-31	339	19.17%	4.13%	4.13%	2.65%	≥40<45		-	-
Marketing	2021-11-01 ~ 2021-11-07	314	10.83%	0%	0%	0%	-		-	-
Coupons	2021-11-08 ~ 2021-11-14	297	11.45%	0%	0%	-	-	-	-	-
Messaging	2021-11-15 ~ 2021-11-21	323	10.53%	0%	-		-	-	-	-
Orders	2021-11-22 ~ 2021-11-28	233	0%	-	-	-	-	-	-	-
Settings	2021-11-29 ~ 2021-12-05	0	-	-	-	-	-	-	-	-
Soungs	Customer Sleeping Rate 💿	New Members Ove	rall Active Members	Week Month	Channel: ALL	* Age:	ALL	-		
	0%-20% 20%-40% 40	%-60% 60%-80%	80%-100%							
	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
	2021-10-11 ~ 2021-10-17	360	48.33%	83.61%	73.61%	88.06%	98.33%	95.83%	100%	1. Sec. 1. Sec
	2021-10-18 ~ 2021-10-24	332	74.4%	75%	85.24%			100%	1. Sec. 1. Sec	-
	2021-10-25 ~ 2021-10-31	339	80.83%	95.87%	95.87%	97.35%	100%	1 (C)	-	-

Step 5: Click the [Download] button to support data download

Techsun										Alevin
කි Home	Overall Customer Analytics Cu	stomer Activity Analytics	Customer Rel	tention Analytics						
Analytics	Customer Retention Rate 🖲	New Members Ove	arall Active Members	Week Month	Channel: ALL	* Age:	ALL	* <u>+</u>		
Overview	0%-20% 20%-40% 40	%-60% 📕 60%-80%	80%-100%							
Customers	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
Orders	2021-10-11 ~ 2021-10-17	360	51.67%	16.39%	26.39%	11.94%	1.67%	4.17%	0%	-
A Customers	2021-10-18 ~ 2021-10-24	332	25.6%	25%	14.76%	12.95%	1.81%	0%	-	-
窗 Membership	2021-10-25 ~ 2021-10-31	339	19.17%	4.13%	4.13%	2.65%	0%	-	-	-
网 Marketing	2021-11-01 ~ 2021-11-07	314	10.83%	0%	0%	0%	-	-	-	-
Coupons	2021-11-08 ~ 2021-11-14	297	11.45%	0%	0%	-	-	-	-	-
Messaging	2021-11-15 ~ 2021-11-21	323	10.53%	0%	-	-	-	-	-	-
Corders	2021-11-22 ~ 2021-11-28	233	0%	-	-	-	-	-	-	-
fb. Cottinge	2021-11-29 ~ 2021-12-05	0	-	-	-	-	-	-	-	-
III oottings	Customer Sleeping Rate ()	New Members Over	all Active Members	Week Month	Channel: ALL	• Age:	ALL	¥		
	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
	2021-10-11 ~ 2021-10-17	360	48.33%	83.61%	73.61%	88.06%	98.33%	95.83%	100%	-
	2021-10-18 ~ 2021-10-24	332	74.4%	75%	85.24%				-	-
	2021-10-25 ~ 2021-10-31	339	80.83%	95.87%				-	-	-
=	0001 11 01 0001 11 07		0.0 1794							

Step 6: Click the [Share] button to support page sharing. After the link is successfully copied, you can paste it

Techsun				0	Copy successfully					Ale
ය Home	Overall Customer Analytics C	ustomer Activity Analytics	Customer Rel	ention Analytics						
Analytics	Customer Retention Rate	New Members     Ow	Share li erall Active	nk		×	ALL	* ±		
Overview	0%-20% 20%-40% 4	0%-60% 🔳 60%-80% 📕	Succe	essfully created link	em la de lumber de vie	1620502101446510				
Customers	Time	New Members	1 Wee	saaszoso.techsun.c	om/cup/upioddevie	W/1030503191440DIC	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
Orders	2021-10-11 ~ 2021-10-17	360	51.67		Cancel	One-click copy	1.67%	4.17%	0%	
条 Customers	2021-10-18 - 2021-10-24	332	25.6%	25%	14.76%	12.95%	1.81%	0%		
හි Membership	2021-10-25 ~ 2021-10-31	339	19.17%	4.13%	4.13%	2.65%	0%			
Marketing	2021-11-01 ~ 2021-11-07	314	10.83%	0%	0%	0%				
3 Coupons	2021-11-08 ~ 2021-11-14	297	11.45%	0%	0%					
9 Messaging	2021-11-15 ~ 2021-11-21	323	10.53%	0%						
	2021-11-22 ~ 2021-11-28	233	0%							
a Orders	2021-11-29 ~ 2021-12-05	0								
1 Settings	Customer Sleeping Rate ()	New Members Over	all Active Members	Week Month	Channel: ALL	* Age:	ALL	•		
	Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
	2021-10-11 ~ 2021-10-17	360	48.33%	83.61%						
	2021-10-18 ~ 2021-10-24	332	74.4%						-	
	2021-10-25 ~ 2021-10-31	339	80.83%					-		

a saas2030.techsun.com/cd	lp/uploadeview/1638503191446b	lob.png							
Overall Customer Analytics	Customer Activity Analytics	Customer Ret	ention Analytics						
Customer Retention F	Rate New Members Ove	rall Active Members	Week Month	Channel: ALL	Age:	ALL			
01-201 201-401	404-604 604-904	908-1008							
0%-20% 20%-40%	403-603 003-803	80%-100%							
Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
2021-10-11 ~ 2021-10-1	7 360	51.67%	16.39%	26.39%	11.94%	1.67%	4.17%	0%	-
2021-10-18 ~ 2021-10-3	24 332	25.6%	25%	14.76%	12.95%	1.81%	0%	-	-
2021-10-25 - 2021-10-	31 339	19.17%	4.13%	4.13%	2.65%	0%	-	-	-
2021-11-01 - 2021-11-03	7 314	10.83%	0%	0%	0%	-	-	-	
2021-11-08 ~ 2021-11-1	4 297	11.45%	0%	0%	-	-	-	-	-
2021-11-15 ~ 2021-11-21	323	10.53%	0%	-	-	-	-	-	-
2021-11-22 ~ 2021-11-2	8 233	0%	-	-	-	-	-	-	-
2021-11-29 ~ 2021-12-0	05 0	-	-	-	-	-	-	-	-
Customer Sleeping Ro	New Members Over	all Active Members	Week Month	Channel: ALL	Age:	ALL			
0%-20% 20%-40%	40%-60% 60%-80%	80%-100%							
Time	New Members	1 Week Later	2 Weeks Later	3 Weeks Later	4 Weeks Later	5 Weeks Later	6 Weeks Later	7 Weeks Later	8 Weeks Later
2021-10-11 ~ 2021-10-13	7 360	48.33%	83.61%	73.61%	88.06%	98.33%	95.83%	100%	-
2021-10-18 ~ 2021-10-2	24 332	74.4%	75%					-	-
2021-10-25 ~ 2021-10-	31 339	80.83%						-	-
2021-11-01 ~ 2021-11-0	7 314	89.17%				-	-	-	-

1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

#### ORDERS

#### **Function Description:**

- 1) Orders display: Sales Analysis, Purchase Analysis, Return Analysis;
- 2) Sales analysis: display overall sales, sales distribution, overall sales order volume, sales order volume distribution;
- 3) Purchase analysis: display the distribution of member purchase times, member repurchase rate, and member customer unit price;
- 4) Return analysis: display the return amount, return amount distribution, and return rate;

### • Sales Analysis

## Step 1: Select the menu bar [Analytics] $\rightarrow$ [Orders] $\rightarrow$ [Sales Analytics] to enter the sales analysis view interface

Techsun								Alevin v
ය Home	Sales Analytics Purchase Ana	alytics Return Analytics						
Analytics	Overall Sales () Doy Mon	th Year Fiscal Year 🛓						C
Overview	Sales — Growth Rate 24.91w							
Orders	200000							9000%
条 Customers	100000	72	72	72	72	4464	4464	3000%
ම Membership	02021-11-26	2021-11-27	2021-11-28	2021-11-29	2021-11-30	2021-12-01	2021-12-02	- 0%
স্থি Marketing	Sales Distribution	ny ∨ 2021-12-02 <u>↓</u>						
Coupons	Channel Distribution ③		Online and Offline	Distribution 💿		Tier Distribution of Members	•	
Drders	tmal, 0.00%	0 offine, 9839%	Offline, 91	Onir Lays	ne, 1.61%	Iron member, 38.57%	Bronze member	r. 22.85% , 22.04%
	Overall Sales Order Volume	🖲 🛈 Day Month Year Fiscal	Year 👤					
	Order Volumn — Growth Rate     155							
	100							6000% 4000%
:=	30	2	2	2	2	20	20	2000%

Step 2: Click the [Day], [Month], [Year], [Fiscal Year] buttons to support day, month, year, and fiscal year filtering; click the [Yesterday] button to support date filtering

Techsun							Alevin v
	Sales Analytics Purchase Analytics Return Analytics						
Analytics	Overall Sales 🕐 🖸 Month Year Fiscal Year						3
Overview	Sales - Growth Rate						
Customers	24.210						
Orders	200000 150000						9000%
身 Customers	100000 50000 72	72	72	72	4464	4464	3000%
创 Membership	0 2021-11-26 2021-11-27	2021-11-28	2021-11-29	2021-11-30	2021-12-01	2021-12-02	0%
🕅 Marketing	Sales Distribution @ Vesterray 2002-02-02						
Coupons							
	Channel Distribution ③	Online and Offlin	e Distribution ③		Tier Distribution of Members $\odot$		
Orders	tmall, 0.00% wechat, 1.61%		Onlin	ne, 1.61%	Iron member, 38.57%	Bronze membe	н, 22.85%
掐 Settings		OfFire			Gold member 1653%	Silver member	. 22.04%
	Uning, 30.37.8	Online,	20-33.4		dou memory 10.534		
	Overall Sales Order Volume	al Year					
	Order Volumn — Growth Rate 155						
	150						6000%
	50 <b>2</b>	2	2	2	20	20	2000%

### Instruction Manual:

1) Date supports the screening of yesterday, the last 7 days, the last 30 days, the last 365 days, and this year;

Techsun							Alevin v
ය Home	Sales Analytics Purchase Analytics Return Analytics						
Analytics	Overall Sales () Doy Month Year Fiscal Year						ß
Overview Customers Orders	Sales — Growth Rate     24.91w     20000     10000     10000						9000% 6000% 3000%
図 Membership	0 72 0 2021-11-26 2021-11-27	72 2021-11-28	72 2021-11-29	72 2021-11-30	2021-12-01	2021-12-02	- 0%
Marketing	Sales Distribution  (* vesterday v 2021-12-02						
은 Coupons Messaging D Orders 출 Settings	Channel Distribution ③	Online and Offline Dis Offline, 98.397	tribution © Critice,	1.61%	Tier Distribution of Members ③ Iron member, 38.57% Gold member, 16.51%	Bronze membe	r. 22.85% . 22.04%
	Overall Sales Order Volume  Toy Month Year Fiscal Year	<u>*</u>					
	Order Volumn     Growth Rate     155     10     30     2	2	2	2	20	20	6000% 4000% 2000%

Step 3: Click the [Download] button to support data download

Step 4: Click the [Share] button to support page sharing. After the link is successfully copied, you can paste it

Techsun		Copy successfully		Alevin v
කි Home	Sales Analytics Purchase Analytics Return Analytics			
Analytics	Overall Sales 👁 Doy Month Year Fiscal Year 👱	Share link X		
Overview	Sales — Growth Rate	Successfully created link     The second secon		
Customers	24.31W	https://sdaszoso.techsun.com/cap/upiodaeview/iossonios44asoio		
Orders	150000	Cancel One-click copy		6000%
A Customers	50000 72 0 2001 0 27 2001 40 27	72 72	72 4464	4464 3000%
创 Membership				
Marketing	Sales Distribution  (* Yesterday * 2021-12-02			
	Channel Distribution (9)	Online and Offline Distribution ①	Tier Distribution of	of Members @
Orders	wechat, 1.81%	Coline, 1.619	No member	Bronze member, 22.85%
🖻 Settings	.com, 0.00%-2			
	offline, 98.39%	Offline, 98.39%	Gold member.	16.53% Silver member, 22.04%
	Overall Sales Order Volume () Day Month Year Fi	scal Year		
	Order Volumn — Growth Rate 155			
	150			6000%
	50 2	2 2	2 20	4000% 20 2000%

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Sales Analytics Purchase Analytics Retu	rn Analytics						
Overall Sales Day Month Year Fi	scal Year						
Sales — Growth Rate 24.91w							
200000 150000 100000 0 2011-11-26	72 2021-11-27	72 2021-11-28	72 2021-11-29	72 2021-11-30	4464 2021-12-01	4464 2021-12-02	9000% 6000% 3000% 0%
Sales Distribution Yesterday ¥ 2021-12-02							
Channel Distribution		Online and Offline Distr	ibution		Tier Distribution of Members		
tmal, 00%	-Filine 98.39%		Online, 1.61	C.	lion member, 38.57% —	Bronze membe Silver member,	r, 22.85% 22.04%
		Omine, 98.39% -			Gold member, 16.53%		
Overall Sales Order Volume Day	fonth Year Fiscal Year	Umine, so.sra-			Gold member, 16.53%		
Overall Sales Order Volume ov	Ionth Year Fiscal Year	Umine, 99.3974 -			Gold member. 16.53%		
Overall Sales Order Volume Doy 1	Aonth Year Fiscal Year	Umine, 96399 -			Gold member . 1633%		6000% 4000%
Overall Sales Order Volume boy a	Aonth Year Fiscal Year	Cmire, 96399-	2	2	Gold member. 1633%	20	600075 400075 200075

- 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;
- Purchase analysis

Step 1: Select the menu bar [Analytics] $\rightarrow$ [Orders] $\rightarrow$ [Purchase Analytics] to enter the purchase analysis view interface



## Step 2: Click the [Yesterday] button to support date filtering

Techsun							Alevin ∨
ය Home	Sales Analytics Purchase Analytics Return Analy	tics					
Analytics	Purchase Frequency Distribution of Members	⑦ Yesterday × ∨ <u>↓</u>	ן				2
Overview	- mB	<ul><li>Yesterday</li><li>Recent 7 days</li></ul>					
Customers	12000	Recent 30 Days					
Orders	9000	This Year					
兔 Customers	3000						
🖄 Membership	OTime(s)	1Time(s)	2Time(s)	3Time(s)	4Time(s)	> 5Time(s)	
阿 Marketing	Repurchase Rate of Members	2021 👤					
E Coupons	Overall Member Repurchase Rate 💿						
Messaging	0.05 % Total of repurchase customers is 6						
Orders							
角 Settings	Repurchase Rate of Members by Channel (*) Number of People – Repurchase Rate 2 2 2			Repurchase Rate of Members by Age ③ Number of People — Repurchase Rate		2	
		1 1	0.02% 0.015% 0.01% 0.005%		0		- 0.012% - 0.015% - 0.01% - 0.005%
	com offline offe	rs tmall wech	at U76	<18 (18-25) [25-30	) (30-35) (35-40)	(40-45) (45+	- 0%
	Viember AIV (g) vesterday V 02/12/2021						
	Overall Member ATV ③						

#### Instruction Manual:

1) Date supports the screening of yesterday, the last 7 days, the last 30 days, the last 365 days, and this year;

## Step 3: Click the [Download] button to support data download



Step 4: Click the [Share] button to support page sharing. After the link is successfully copied, you can paste it

Techsun	Copy successfully	Alevin v
ක Home	Soles Analytics Purchase Analytics Return Analytics	
Analytics	Share link X Purchase Frequency Distribution of Members (1) Yester	
Overview	BB     O Successfully created link	
Customers	nttps://sooszcioutechsun.com/cop/uploodeview/losesitzes-subblo	
Orders	S000 Concel One-click copy	
A Customers	0 0 Minuto) Minuto) Minuto) Minuto) Alimato	
Membership		
E Coupons	Repurchase Rate of Members @ vesteeday v 02/2/202 🛓	
Messaging	Overall Member Repurchase Rate ()	
Orders	VVV 3 % I total or repulcinase customers is a	
酌 Settings	Repurchase Rate of Members by Channel (b)         Repurchase Rate of Members by Age (b)           Number of People         — Repurchase Rate	
	2 2 2 2 1 1 0 0 0 0 0 0 0 0 0 0 0 0 0	0.02% 0.015% 0.01% 0.005% 0%
	Member ATV 💿 vesterday 🗸 02/2/2003 👱	
=	Overall Member ATV @ 632.57 vuon Total of purchased customers 7 Dod + 0 %	

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Sales Analytics Purchase Analytics Return Analytic	\$			
Purchase Frequency Distribution of Members	Yesterday X 💙			
- #B				
12000				
9000				
3000	<			
OTime(s)	1Time(s) 2Time(s)	3Time(s)	4Time(s)	>STime(s)
Repurchase Rate of Members Vesterday V 02/12/20	21			
Overall Member Repurchase Rate				
0.05 % Total of repurchase customers is 6				
Repurchase Rate of Members by Channel     Number of People — Repurchase Rate		Repurchase Rate of Members by Age     Number of People — Repurchase Rate		
2 2 2	0.02%	2	2	0.02%
	0.01%			0.01%
0 .com offline others	trnall wechat 0%	0 <18 [18-25] [25-30]	[30-35) [35-40) [40-4	15) [45+
Member ATV Vesterday V 02/12/2021				
Overall Member ATV	-			
USE. ST Yuan Total of purchased customers / DoD 0	x			
ruction Manual				

## 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

## • Return analysis

Step 1: Select the menu bar [Analytics] $\rightarrow$ [Orders] $\rightarrow$ [Return Analytics] to enter the return analysis view interface



Step 2: Click the [Yesterday] button to support date filtering



1) Date supports the screening of yesterday, the last 7 days, the last 30 days, the last 365 days, and this year;

## Step 3: Click the [Download] button to support data download



## Step 4: Click the [Share] button to support page sharing



Actum Amount addent / do													
504 Yuan The ratio of return Ar	mount 0.2 % DoD -85.25 1	4											
80 72 60 40 20 0 2021-11-26	72 2021-11-2	7	72 2021-11-28		72		2021-11-30		2021-12	2-01	2021	-12-02	
Return Amount Distributio	Yesterday V 2021-12-02												
Return Amount Distribution I	by Purchased Channel	wechat, 100.00%			R	eturn Amount I	Non-me	v Customer Ty		- Members	. 50.00%		
Return Amount Distribution	by Purchased Province												
40 20 0 0.00% 0.00%	0.00% 0.00% 0.00% 0.00%	0.00% 0.00% 0.00%	0.00% 0.00%	0.00% 0.00%	0.00% 0.00	% 0.00% 0.00%	0.00% 0.00%	0.00% 0.00%	0.00% 0.009	6 0.00% 0.00	1% 0.00% 0.001	6 0.00% 0.00	0%
Inner mongolia Tibet	Shanghai Hubei	Sichuan	Xinjiang	Jilin	Hebei	广西壮族自治区	Jiangxi	Yunnan	Shandong	Zhejiang	Tianjing	Taiwan	
Actum Rate Testerody - 202	1-12-02												

Support one-click copy or manual copy, after the link is successfully copied, you can share;

## 6. CUSTOMERS

#### WHAT IS CUSTOMERS

The Customers connects consumer data from external channels, including stores, official websites, APP, WeChat, Alipay, Tmall, JD, Meituan, Dianping, Ele.me, shopee, lazada, shopify, LINE etc. Channels, distributor channels, brand co-branded members, etc., through the system application API layer, complete the transmission of member data into the system, and create basic levels for members, point accounts, display user behavior events and tags, and form a 360° user Personas ;

#### PERSONAS

#### **Function Description:**

- 1) User Personas display: basic information, consumption indicators, guess his like, user tags, user events;
- 2) Basic information: display avatar, nickname, mobile phone number, email address, birthday, membership channel, Stores, exclusive shopping guide;
- 3) Support one-key deletion of PII data: name, mobile phone, email, birthday;
- Consumption indicators: display key consumption indicators such as the user's historical cumulative consumption, historical cumulative average customer unit price, historical cumulative average number of customers, etc.;
- 5) User tags: display user tag information through the tag cloud, and understand the important characteristics of users at a glance;
- 6) User events: display collected user event records in the form of time axis, covering: registration, purchase, etc.;

## Step 1: Select the menu bar[Customers] $\rightarrow$ [Portraits] to enter the user Personas view interface

Techsun											Alevin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by name	e, phone number – C									88
& Customers	Customer Name	Customer Source	Gender	Birthday	Phone Number	Postal Code	Country/Region	Province/State	City	Creation Time	Operation
Portroits	. en	Shopify	Male	**/**/1992	+65 ****0250		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
Segmentations	**e	JD Flagship Shop	Female	**/**/1992	+65 ****0249		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
Tags	**m	Shopify	Male	**/**/1992	+65 ****0248		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
Metadatas	**9	NEWPOS	Male	**/**/1992	+65 ****0247		Singapore		Singapore	05/11/2021 3:53 PM	info Portroit
14 Marketing		Shopify	Male	**/**/1992	+65 ****0246		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
E3 Coupons	**k	NEWPOS	Female	**/**/1992	+65 ****0245		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
Messaging	***	NEWPOS	Female	**/**/1992	+65 ****0244		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
☐ Orders	**	JD Flagship Shop	Male	**/**/1982	+65 ****0243		Singapore		Singapore	05/11/2021 3:53 PM	info Portroit
	**5	Shopify	Male	**/**/1992	+65 ****0242		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
	**m	Shopify	Female	**/**/1992	+65 ****0241		Singapore		Singapore	05/11/2021 3:53 PM	Info Portroit
	1.44	JD Flagship Shop	Male	**/**/1992	+65 ****0240		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
							Total 258 piece(s) of a	data < 1 2	3 4 5	6 7 8 9 >	30 / page / Go to

#### Instruction Manual:

1) Support query based on name and mobile phone number;

## Step 2: View the customer's Portraits through the user Personas



#### SEGMENTATIONS

### **Function Description:**

- The system provides the function of group management, that is, the crowd list of marketing activities. Support includes group filtering function, where the filtering conditions support "and\or" free combination filtering through user events and user tags;
- 2) Group information includes group name, group type, group description, and button to generate Segmentations at the same time;
- 3) After completing the configuration, click Save, and the system will automatically generate the crowd list, which can be referenced to marketing activities for marketing reach.

## Step 1: Select the menu bar[Customers] $\rightarrow$ [Segmentations] to enter the group management view interface

Techsun											超级管理员 >
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by grou	up nome/group code Q									+ Create
& Customers	Group ID 💠	Group Name 💈	Group Desc	Group Size	Enabled Status	Portrait Status	Data Update Time	≎ Group Status ≎	Owner :	Creator :	Operation
Portraits	37	Payment		0	Enabled	Not Created	2021/12/01 9:33	Successful	Fairuz	Fairuz	Creating Portrait Copy
Segmentations	35	Black Friday promotion		258	Enabled	Creating	2021/11/25 21:13	Successful	administrator	administrator	Сору
Tags	34	total-inves		258	Enabled	Creating	2021/11/25 16:57	Successful	administrator	administrator	Сору
Metadatas	33	Birthday party	The group meets the followi ng conditions: members, Sin gapore, the post-90s gener ation, Recent purchase	72	Disabled	Not Created	2021/11/23 13:20	Successful	Alevin	Alevin	Edit Creating Portrait Enable i
Coupons	21	Loud Speaker Test	Transaction Propensity (2-5 times)	106	Disabled	Not Created	2021/11/22 10:13	Successful	Echo-Zhang	Echo-Zhang	Edit Creating Portrait Enable
의 Messaging 그 Orders	31	Birthday_Promotion	The group meets the followi ng conditions: Singapore; th e post-90s generation; ham burger lover; Recent purcha se;	164	Enabled	Created	2021/11/19 16:12	Successful	Alevin	Alevin	Creating Portrait Copy
1 Settings	24	Birthday Party Promotion	The group meets the followi ng conditions: Singapore; th e post-90s generation; ham burger lover; Recent purcha se; Birthday	0	Enabled	Not Created	2021/11/19 10:31	Successful	Alevin	Alevin	Creating Portrait Copy
	22	UserLifeCycle		202	Enabled	Not Created	2021/11/15 13:36	Successful	Demo02	Demo02	Creating Portrait Copy
									Т	otal 10 piece(s) of de	ata < 1 > 30 / page >

Instruction Manual:

1) Support searching by group name;

## Step 2: Click the [Create] button

iome inalytics	Search by grou	up nome/group code Q									+ Cr
ustomers	Group ID 👙	Group Name 💈	Group Desc	Group Size	Enabled Status	Portrait Status ‡	Data Update Time	<ul> <li>Group</li> <li>Status</li> </ul>	Owner :	Creator ‡	Operation
rtraits	37	Payment		0	Enabled	Not Created	2021/12/01 9:33	Successful	Fairuz	Fairuz	Creating Portrait Copy
gmentations	35	Black Friday promotion		258	Enabled	Creating	2021/11/25 21:13	Successful	administrator	administrator	Сору
gs	34	total-inves		258	Enabled	Creating	2021/11/25 16:57	Successful	administrator	administrator	Сору
embership	33	Birthday party	The group meets the followi ng conditions: members, Sin gapore, the post-90s gener ation, Recent purchase	72	Disabled	Not Created	2021/11/23 13:20	Successful	Alevin	Alevin	Edit Creating Portrait Enable i
upons	21	Loud Speaker Test	Transaction Propensity (2-5 times)	106	Disabled	Not Created	2021/11/22 10:13	Successful	Echo-Zhang	Echo-Zhang	Edit Creating Portrait Enable i
ssaging	31	Birthday_Promotion	The group meets the followi ng conditions: Singapore; th e past-90s generation; ham burger lover; Recent purcha se;	164	Enabled	Created	2021/11/19 16:12	Successful	Alevin	Alevin	Creating Portrait Copy
tings	24	Birthday Party Promotion	The group meets the following conditions: Singapore; the post-90s generation; ham burger lover; Recent purchase; Birthday	0	Enabled	Not Created	2021/11/19 10:31	Successful	Alevin	Alovin	Creating Portrait Copy
	22	UserLifeCycle		202	Enabled	Not Created	2021/11/15 13:36	Successful	Demo02	Demo02	Creating Portrait Copy

Step 3: After entering specific information on the creation page, click Save

Techsun		超级管理员 >
ය Home	Home > Customers > Segmentations > Create	
Analytics	Group Info	
& Customers		
Portraits	Group Name: Black Friday promotion	
Segmentations	Group Type: List v	
Tags	Group Desc: Please enter, no more than 300 words	
Metadatas		
窗 Membership	Meanwhile create group por	
聞 Marketing	Group Filter	
E Coupons		
Messaging	Target group tag meet the following requirements  + Add filter	
Crders	Target group behavior meet the following requirements     Add filter	
酌 Settings	And 2021-01-01,2021-12-31 Existed V Registration event V	
	Attributes Accumulative total	
	Target group list Add or remove current group + Add filter + Add filter	
	Cancel Preview Save	

- 1) Group filter conditions support flexible combination of the following dimensions, [or] or [and] relationship:
- According to the customer's label attribute dimension: flexible combination according to the customer's attribute characteristics and labels;
- According to the behavior dimension of the crowd: According to the behavior event, and can be flexibly combined according to the attributes in the event; support time control, what behavior occurred in the content during a certain period of time, what conditions the attributes in the behavior meet, for example, in December 2020 From January 1st to December 31st, 2020, there have been consumer behaviors, and the consumption amount is more than 1,000 yuan, and the purchase order contains the combination conditions of XX goods;
- Time control support: absolute time and relative time
   Absolute time: specific time period, today, tomorrow, yesterday, tomorrow, this week, last
   week, next week, this month, last month, next month, this season, previous season, next
   season, this year, last year, next year;
   Belative time: relative to X days before & after today, relative to X weeks before & after thic

Relative time: relative to X days before & after today, relative to X weeks before & after this week, relative to X months before & after this month, relative to X seasons before & after this season, relative to X years before & after this year ;

2) According to the existing group list dimensions;

Techsun		超级管理员 >
ය Home	Home > Customers > Segmentations > Create	
Analytics	Group Info	
冬 Customers		
Portraits	* Group Name : Block Friday promotion	
Segmentations	Group Type: List	
Tags	Group Desc: Please enter, no more than 300 words	
Metadatas		
図 Membership	Meanwhile create group por	
阙 Marketing	Group Filter	
Coupons		
Messaging	C Target group tag meet the following requirements + Add fitter	
Orders	Target group behavior meet the following requirements     Add filter	
췹 Settings	And 2021-01-01,2021-12-31 Existed V Registration event V	
	Attributes Accumulative total	
	Target group list Add or remove current group     + Add littar	
:=	Cancel Preview Save	

## Step 4: After entering specific information on the creation page, you can click Preview

### Instruction Manual:

1) After the selection of conditions is completed, query by previewing the number of people is supported;

## Step 5: After entering the group information, click "Save".

Techsun		超级管理员 >
යි Home	Home > Customers > Segmentations > Create	
Analytics	Group Info	
冬 Customers		
Portraits	Group Name: Black Hoday promotion	
Segmentations	Group Desc: Please enter, no more than 300 words	
Tags		
Metadatas	Megnehile create aroun por	
ම Membership		
₩ Marketing	oroup river	
El Coupons		
Messaging	Target group tag meet the following requirements	
Orders	Target group behavior meet the following requirements     + Add filter	
韵 Settings	And 2021-01-012021-12-31 Existed V Registration event V	
	Attributes Accumulative total	
	Target group list Add or remove current group + Add filter	
	Cancel Preview Save	

Step 6: Complete the creation of the Segmentations

- 1) Description of Segmentations status: After saving the filter conditions, click the [Generate Personas] button;
- 2) Click to generate a Personas: the status of the column of the generated Personas will change to "generating". At this time, all buttons cannot be clicked;
- When the status of the generated Personas column becomes "Generation Complete" & "Generation Failed", the operation buttons [Edit], [Generate Image], [Enable], [Copy], and [Delete] can all be clicked;
- When the status of the generated Personas column becomes "Generation Complete" & "Generation Failed", you can edit the conditions again;
- 5) If you click the [Enable] button, the enabled list does not support editing again; at this time, the operation buttons [Edit], [Enable], and [Delete] cannot be clicked;
- 6) Support the duplication of Segmentationss;

Group ID ÷ 37 35 34 33	p nome/group code Q Group Name ± Payment: Block Friday promotion total-inves Birthday porty	Group Desc	Group Size 0 258 258		Enabled Status ¢ Enabled Enabled	Portrait Status = Not Creating Creating	Data Update Time 2021/12/01 9:33 2021/11/25 2113 2021/11/25 16:57		Group Status + Successful Successful	Owner () Fairuz administrator administrator	Creator ; Foiruz administrator administrator	+ Creation Creating Portrolit Copy Copy Copy
Group ID ‡ 37 35 34 33	Group Name : Payment Block Friday promotion tatal-inves Birthday party	Group Desc	Group Size 0 258 258		Enabled Status C Enabled Enabled	Portrait Status a Not Created Creating Creating	Data Update Time 2021/12/01 9:33 2021/11/25 21:13 2021/11/25 16:57		Group Status C Successful Successful Successful	Owner c Fairuz administrator administrator	Creator : Fairuz administrator administrator	Coperation Creating Portrait Copy Copy Copy Copy
37 35 34 33	Payment Black Friday promotion total-inves Birthday party	The group meets the following conditions: members Sin	0 258 258		Enabled Enabled Enabled	Not Creating Creating Creating	2021/12/01 9:33 2021/11/25 21:13 2021/11/25 16:57		Successful Successful Successful	Fairuz administrator administrator	Fairuz administrator administrator	Creating Portrait Copy Copy Copy
35 34 33	Black Friday promotion total-inves Birthday party	The group meets the followi	258 258		Enabled	Creating	2021/11/25 21:13 2021/11/25 16:57		Successful Successful	administrator administrator	administrator administrator	Сору Сору
34	total-inves Birthday party	The group meets the following conditions: members Sin	258		Enabled	Creating	2021/11/25 16:57		Successful	administrator	administrator	Сору
33	Birthday party	The group meets the following conditions: members Sin										
		gapore, the post-90s gener ation, Recent purchase	72		Disabled	Not Created	2021/11/23 13:20		Successful	Alevin	Alevin	Edit Creating Portrait
21	Loud Speaker Test	Transaction Propensity (2-5 times)	106		Disabled	Not Created	2021/11/22 10:13		Successful	Echo-Zhang	Echo-Zhang	Edit Creating Portrait Enable
31	Birthday_Promotion	The group meets the followi ng conditions. Singapore; th e post-90s generation; ham burger lover; Recent purcha se;	164		Enabled	Created	2021/11/19 16:12		Successful	Alevin	Alevin	Creating Portrait Copy
24	Birthday Party Promotion	The group meets the following conditions: Singapore; the post-90s generation; ham burger lover; Recent purchase; Birthday	o		Enabled	Not Created	2021/11/19 10:31		Successful	Alevin	Alevin	Creating Portrait Copy
22	UserLifeCycle		202		Enabled	Not Created	2021/11/15 13:36		Successful	Demo02	Demo02	Creating Portrait Copy
21 31 24 22	1	Birthday_Promotion Birthday Party Promotion UserUleCycle	Louis spatial risk times)     The group meets the following conditions: Singapore: k     Birthday_Promotion     Birthday Party Promotion     Birthday Party Promotion     UserUileCycle	Louis spirator rest         times)         Dos           Birthday_Promotion         The group meets the following conditions: Singapore: the burger lover; Recent purchase; and conditions: Singapore; the generation; the post-96 generation; the ng conditions: Singapore; the post-96 generation; the post-96 generation; the post-96 generation; the burger lover; Recent purchase; Birthday           L         Birthday_Party Promotion         The group meets the following conditions: Singapore; the post-96 generation; ham 0 burger lover; Recent purchase; Birthday           L         Usert/BCCycle         202	Lobs spirator her         times)         No           Birthday_Promotion         The group meets the following post-tog generation: ham 164 burger lover; Recent purchases; and the post-tog generation: ham 164 burger lover; Recent purchase;         The group meets the following post-tog generation: ham 164 burger lover; Recent purchases; the generation: singapore; the generation: singapore; the post-tog generation: ham 0 burger lover; Recent purchase; Birthday         The group meets the following generation: ham 0 burger lover; Recent purchase; Birthday           t         Usert/lieCycle         202	Loop spector rest         times         los         Lisband           Birthday_Promotion         The group meets the following conditions: Singapper: the part-96s generation; ham burger lover; Recent purchaise;         Birthday Promotion         Birthday         Enabled         Enabled           Birthday_Party Promotion         Birthday Rest, be care to purch as se;         The group meets the following condition; Singapper; the part-96s generation; ham burger lover; Recent purchaise; Birthday         0         Enabled           UserLifeCycle         202         Enabled	Louis spreader rest         times)         Iois         Dadaled         Not Created           Birthday_Promotion         The group meets the following constitutions: Singapore: the burger lover; Recent purchase; and the post-90 generation; ham 164         Enabled         Created           Birthday_Promotion         The group meets the following constitution: Singapore: the generation; ham 164         Enabled         Created           Birthday_Party Promotion         Birthday         The group meets the following constitution: Singapore: the generation; ham 0         Enabled         Not Created           UsertUisCycle         202         Enabled         Not Created	Loop spectron rest     times)     106     Disabled     Het Chadded     2021/11/22 LOOS       Birthday_Promotion     The group meets the following point long constitutions: Singapper: the point-06s generation; ham burger lower; Recent purchalse:     164     Enabled     Created     2021/11/19 18:12       Birthday Party Promotion     The group meets the following constitution:     164     Enabled     Created     2021/11/19 18:12       Birthday Party Promotion     point-06s generation; ham burger lower; Recent purchalse; Birthday     0     Enabled     Not Created     2021/11/19 10:31       UsertUIeCycle     202     Enabled     Not Created     2021/11/15 13:36	Louis spectaer risk     times)     los     Disabled     Hot Checked     2021/11/22 LNJS       Birthdoy_Promotion     The group meets the following conditions: Singapper: Link     Enabled     Created     2021/11/19 18:12       Birthdoy Porty Promotion     e post-96 generation; hom go conditions: Singapper: Link     164     Enabled     Created     2021/11/19 18:12       Birthdoy Party Promotion     mg conditions: Singapper: Link     0     Enabled     Not Created     2021/11/19 10:31       UsertUIeCycle     202     Enabled     Not Created     2021/11/19 10:31	Louis specture risk     times)     los     Discline     Discline     Successful       Birthday_Promotion     The group meets the following conditions: Singapore: the post-908 generation; horn burger lover; Recent purchoise; Recent purchoise; Singapore: the generation; Singapore: the generation; Singapore: the generation; Singapore: the generation; Recent purchoise; Recent purchoise; Recent purchoise; Recent purchoise; Birthday     The group meets the following condition; Singapore: the generation; Singapore: the post-908 generation; Recent purchoise; Recent purchoise; Birthday     Enabled     Not Created     2021/11/19 10:31     Successful       UserLifeCycle     202     Enabled     Not Created     2021/11/19 10:33     Successful	Loop spector rest     times)     Loo     Lood Disabled     Net Choice     2021/11/22 Loos     Successful     center Choice       Birthday_Promotion     The group meets the following point loss Singapore. It is post-068 generation; horm on set     Birthday_Promotion     Post-068 generation; horm on set     Birthday     Successful     Alevin       Birthday Party Promotion     The group meets the following exercising point loss set     Birthday     The group meets the following exercising point loss set     Birthday Party Promotion     Successful     Alevin       Birthday Party Promotion     Expati-068 generation; horm on set Birthday     0     Enabled     Not Created     2021/11/19 10:31     Successful     Alevin       UserLifeCycle     202     Enabled     Not Created     2021/11/16 13:36     Successful     Demo02	Louis product rist     times)     times) <thtimes)< th="">     times)     times)     <t< td=""></t<></thtimes)<>

## Step 3: Click the enable button to enable the group

1) After the group is enabled, the group status becomes enabled

2) In the enabled state, editing of groups is not supported

## Step 4: Click to Creating Portrait and manually update the group

Techsun													超级管理
Home	Search by grou	up nome/group code Q											+ Cre
Customers	Group ID 👙	Group Name 💈	Group Desc	Group Size	0	Enabled Status	Portrait Status	Data Update Time	0	Group Status	Owner :	Creator :	Operation
Portraits	37	Payment		0		Enabled	Not Created	2021/12/01 9:33		Successful	Fairuz	Fairuz	Creating Portrait Copy
Segmentations	35	Black Friday promotion		258		Enabled	Creating	2021/11/25 21:13		Successful	administrator	administrator	Сору
Tags	34	total-inves		258		Enabled	Creating	2021/11/25 16:57		Successful	administrator	administrator	Сору
Metadatas Membership	33	Birthday party	The group meets the followi ng conditions: members, Sin gapore, the post-90s gener ation, Recent purchase	72		Disabled	Not Created	2021/11/23 13:20		Successful	Alevin	Alevin	Edit Creating Portrait
Coupons	21	Loud Speaker Test	Transaction Propensity (2-5 times)	106		Disabled	Not Created	2021/11/22 10:13		Successful	Echo-Zhang	Echo-Zhong	Edit Creating Portrait Enable
Messaging Orders	31	Birthday_Promotion	The group meets the followi ng conditions: Singapore; th e post-90s generation; ham burger lover; Recent purcha se;	164		Enabled	Created	2021/11/19 16:12		Successful	Alevin	Alevin	Creating Portrait Copy
Settings	24	Birthday Party Promotion	The group meets the followi ng conditions: Singapore; th e post-90s generation; ham burger lover; Recent purcha se; Birthday	0		Enabled	Not Created	2021/11/19 10:31		Successful	Alevin	Alovin	Creating Portrait Copy
	22	UserLifeCycle		202		Enabled	Not Created	2021/11/15 13:36		Successful	Demo02	Demo02	Creating Portrait Copy
												Total 10 piece(s) of do	ta 🖂 1 > 🛛 30 / pag

1) Click the Generate Personas button, the data status is updating,

2) When the data status is updating, editing, updating, and generating Personas operations are not supported

## **Step 5: Click the Creating Portrait button to generate the latest Segmentations**

## Step 6: Click the copy button to copy the content of the group

Techsun											超级管理员 >
<ul> <li>ᢙ Home</li> <li>Ø Analytics</li> </ul>	Search by grou	up name/graup code Q									+ Create
& Customers	Group ID 👙	Group Name 💈	Group Desc	Group Size	Contraction Status	Portrait Status	Data Update Time	t Group t Status t	Owner ¢	Creator ÷	Operation
Portraits	37	Payment		0	Enabled	Not Created	2021/12/01 9:33	Successful	Fairuz	Fairuz	Creating Portrait Copy
Segmentations	35	Black Friday promotion		258	Enabled	Creating	2021/11/25 21:13	Successful	administrator	administrator	Сору
Tags	34	total-inves		258	Enabled	Creating	2021/11/25 16:57	Successful	administrator	administrator	Сору
Metadatas Membership	33	Birthday party	The group meets the followi ng conditions: members, Sin gapore, the post-90s gener ation, Recent purchase	72	Disabled	Not Created	2021/11/23 13:20	Successful	Alevin	Alevin	Edit Creating Portrait Enable i
Coupons	21	Loud Speaker Test	Transaction Propensity (2-5 times)	106	Disabled	Not Created	2021/11/22 10:13	Successful	Echo-Zhang	Echo-Zhang	Edit Creating Portrait Enable :
Messaging	31	Birthday_Promotion	The group meets the followi ng conditions: Singapore; th e post-90s generation; ham burger lover; Recent purcha se;	164	Enabled	Created	2021/11/19 16:12	Successful	Alevin	Alevin	Creating Portrait Copy
췶 Settings	24	Birthday Party Promotion	The group meets the followi ng conditions: Singapore; th e post-90s generation; ham burger lover; Recent purcha se; Birthday	0	Enabled	Not Created	2021/11/19 10:31	Successful	Alevin	Alevin	Creating Portrait Copy
	22	UserLifeCycle		202	Enabled	Not Created	2021/11/15 13:36	Successful	Demo02	Demo02	Creating Portrait Copy
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### TAGS Function Description:

- 1) New tags support 4 types of tags: custom tags, preference tags, static tags, and SQL tags
- Custom labels: Classify labels through custom label values, and customize label value calculation rules according to user attributes and behaviors;
- Preference tags: filter out users who meet the tag rules through events, and use the user's event attribute ranking as the tag value;
- Static labels: classify labels by customizing label values and provide open interfaces to provide unified label services for third-party systems such as customer service and shopping guides;
- SQL label: Customize label calculation rules by writing SQL statements, and use the result returned by the SQL statement as the label value.
- 2) Label analysis: The system provides to view the label value distribution data after 30 updates in history
- 3) Label update function: The system provides the function of regularly updating labels and manually updating labels.
- 4) Label activation: The system provides the function of enabling the label. After the label is enabled, the label can be updated regularly and manually;
- 5) Disable function: The system provides the function of disabling the label. After disabling the label, the label will not be updated regularly.
- 6) New/edit label grouping: The system supports grouping labels.

# Step 1: Select the menu bar [Customers] $\rightarrow$ [Tags] to enter the label definition interface
Techsun		超级管理员 >
요 Home 교 Analytics 용 Customers	Search tog norme/tog code Q Y: + Create Group Basic Info Tog Analytics Operation Record	+ Create
Portraits Segmentations Tags Metadatas	W Basic attribute tog         Basic Info           gender         Tog Nome: member level         Tog Abbreviation: member level         Tog ID: BQ20211230020           member level         Tog Status: Inabled         Update Mode: Per I day(a), update togs automatically beforData Status: Updated automatically beforData Status: Updated automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Updated automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update togs automatically beforData Status: Update Mode: Per I day(a), update M	coestully a tog
9 Membership 9 Marketing 3 Coupons 3 Messaging 5 Orders	User life cycle User value V RFM model tags Purchase frequency-F Purchase amount-M Purchase interval-R Card member Diamond card me mber Diamond card me mber Blamond card me mber Gold card member Rober Porchase interval-R	
1 Settings	Preference tog     S_Togs_bithdoy     Store preference     Commodity preference	1

Remark:

- 1) Support searching tags by tag name and tag ID
- 2) It supports filtering tags by tag status, tag type, tag creation time, and tag creator.

## Step 2: Click the [Create] label group button

Techsun								超级管理员 >
ඛ Home I Analytics	Search tag name/tag code Q	TE	tion Operation R					+ Create
A Customers	<ul> <li>Basic attribute tag</li> </ul>	Basic Info	tics Operation M	cora				
Segmentations	member level	Tag Name: member l Tag Status: Enabled	evel	Tag Abbr Update N	eviation: member level lode: Per I day(s), update	tags automatically befo	Tag ID: BQ202111230002 r_Data Status: Updated successfully	
Tags	<ul> <li>Customer value</li> </ul>	Data Update Time: 20 Creation Time: 2021/11	121/11/30 15:13 1/23 14:18	Tag Type Creator:	: Custom Tags administrator		Tag Group: Basic attribute tag	
Metadatas	User points level	Tag Desc:						
创 Membership	User life cycle User value	Tag Rules						
Coupons	<ul> <li>RFM model tags</li> <li>Purchase framency-F</li> </ul>		Card menber	Diamond card me mber	Gold card member	Platinum card me mber		
Messaging	Purchase amount-M	Tag Value Name:     Tag Value Desc:						
췹 Settings	Purchase interval-R							
	S_Tags_birthday	• Tag Rules: C	heck example					
	Store preference Commodity preference		Target group tag	meet the following requirement	5			
	Commodity preference	A	Tier	~ ] [ eq	can	1 m_		

Step 3: Click the [Edit] label grouping button

Search tag no	ame/tag code Q.				+
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tomers	Basic Info Tog	g Analytics Operation Record			opulate of
<ul> <li>Basic attrik</li> </ul>	Basic attribute tag Basic Info				
gende nentations	Tag Name: me	ember level	Tag Abbreviation: member level	Tag ID: BQ202111230002	
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v Customer	value Creation Time:	2021/11/23 14:18	Creator: administrator		
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bership User lif	fe cycle Tag Rules				
eting User ve	alue				
v RFM model	l tags	Card menber Diam	Gold card me Gold card member Platinum co	ird me	
Purcho	ase frequency-F • Tag Value Na	me: Cord menber			
Purcho	ase amount-M Taa Value D	esc:			
Purcho	ase interval-R				
v Preference	tag				
S_Tog	s_birthday * Tag Ru	ules: Check example			
Store p	preference	Target group tag meet the fo	Illowing requirements		
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## Step 4: Click the [Create] label button and select the new label method



Step 5: Select the new label type button and fill in the label information Custom label

	Techsun		超级管理员 ∨
G	Home	Home > Customers > Tags > CreateCustom Tags	
E	2 Analytics	Basic Info	
8	Customers		
	Portroits	* Tog Name: Please enter	
	Segmentations	Tog Abbreviation: Please enter	
	Tags	* Tog Group: Please select V	
	Metadatas	Update Mode:      Auto update     Manual update     Per 1     day (s), undate tags automatically before dawn	
ti ti	a Membership	Tog Desc: Please enter, no more than 300 words	
Þ	R Marketing		
E	3 Coupons	Trin Bules	
E	2 Messaging		
E	3 Orders		
1	Settings		
		Add tag value Reminder: A maximum of 10 tag values can be added to a tag	
		* Tog Value Name: Please enter	
		Tog Value Desc: Please enter, no more than 300 words	
		• Ton Bulas' Charle auronala	
		Cancer	

#### Remark:

- 1) Support adding tag values within 10;
- 2) Support switching to view different label value rules;
- 3) Support to view examples of custom labels;
- 4) Support configuration of automatic update cycle.

## Preference tag

	Techsun		超级管理员 >
1	ය Home	Home > Customers > Togs > CreatePreference Togs	
E	Analytics	Basic Info	
1	Customers		
	Portraits	Tag Name: Please enter	
	Segmentations	Tag Abbreviation: Please enter	
	Tags	★Tog Group: Please select ∨	
	Metadatas	* Update Mode:   Auto update  Manual update	
t	2 Membership	Per 1 ady(s), upadie tags automatically before dawn	
1	R Marketina	TO UNIC: Provide entrementation and the state of the stat	
5	G Coupons		
,		Tag Rules	
		Tro Biles: Check example	
	Orders		
1	1 Settings	Target group behavior meet the following requirements	
		+ Tag Value Name: Please select V Cumulative Occurrences Plea_ V Please _ Please _ Please _ Please _	
	=	Cencel Sove	

#### Remark:

- 1) Support to view examples of custom labels;
- 2) Support configuration of automatic update cycle.

## Static label

	Techsun			超级管理员 >
G	Home	Home > Customers > Tags > Cre	noteStatic Togs	
	2 Analytics	Basic Info		
8	Customers			
	Portraits	* Tag Name :	Please enter	
	Segmentations	* Tag Group:	Pinuae trillet	
	Tags	Tag Desc:	Please enter, no more than 300 words	
	Metadatas			
6	Membership	Tag Rules		
A	Narketing			
E	3 Coupons		Tog Value 1	
	Messaging	l	Add tog value Reminder: A maximum of 10 tog values can be added to a tog	
A	Settings	• Tag Value Name :	Please enter	
	a eetmige	Tag Value Desc:	Please enter, no more than 300 words	
			Concel Sove	

#### Remark:

1) Support adding tag values within 10;

- 2) Support switching to view different label value rules;
- 3) Support to view examples of custom labels;
- 4) Support to provide development interface to connect to third-party systems

## SQL tags

	Techsun	8	◎級管理员 ∨
G	Home	Home > Customers > Tags > CreateSQL calculation Tags	
2	Analytics	Basic Info	
8	Customers		
	Portraits	Tag Norre: Please enter	
	Segmentations	Tog Abbreviation: Please enter	
	Tags	*Tag Group: Please select V	
	Metadatas	* Update Mode:  Auto update  Manual update	
Ŕ	Membership	Per 1 adv(s), upage lags outomatically before down	
đ	Marketing		
E	Coupons		
P	Messaging	ng nuos	
6	Orders	Data Type:      Text      Integer      Float      Currency      Date      Date and Time      Dimension	
Ê	Settings	Data type of return in second row of SQL sentences has to be test, like "strong buying power"	
		Statistics SQL: SILLOT	
		rug_volue vmemmer or becave car (anaceme c_micros) Please enter Please enter	
		Whether to receive email (isreceived_email)	
		Whether member (is_member) Event time (event_time)	
		Membership store (inst_store)	
		Concel Sove	

#### Remark:

- 1) Support configuration of automatic update cycle;
- 2) Support to view table names and field names that can be used in SQL statements

## Step 6: Click the [Enable] label button to enable the label

Techsun						超级管理员 >
ຝ Home ☑ Analytics	Search tag name/tag code Q	Ϋ́Ξ				+ Create
& Customers	+ Create Group	Basic Info Tog Analy	tics Operation Record			Edit Enable
Portraits Segmentations Tags	Basic attribute tag     gender     member level     Customer value	Basic Info Tag Name: Commodi Tag Status: Draft Data Update Time: Creation Time: 18/11/2	ty preference 021 4:50 PM	Tag Abbreviation: Update Mode: Per I day(s), update tags au Tag Type: Preference Tags Creator: Alevin	Tog ID: EQ20211180001 tomatically befor. Data Status: No Data Available Tag Group: Preference tag	
Metadatas 앱 Membership	User points level User life cycle	Tag Desc: Commodity	/ preference			
№ Marketing       E     Coupons       Messaging       D     Orders       Å     Settings	User volue  V RPM model tags  Purchase frequency-F Purchase amount-M Purchase interval-R  V Preference tag  \$_Tags_birthday Store preference Commodity preference Commodity preference	* Tog Rules: C     * Tog Value Norme: 1	heck example Target group behavior meet th 2020-01-01,2020-12-31 Attributes Accumv Product Y Curr	e fallouing requirements . Existed v Tra Listive totot ulative Occurrences Top v 1 Place	nsaction event	

Remark:

- 1) Custom tags, SQL tags, and preference tags are automatically updated once after activation, and will be automatically updated in accordance with the update cycle in the future.
- 2) After the static label is enabled, it can be called in the interface

## Step 7: Click the [Disable] label button to disable the label

Techsun						超级管理员 >
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search tog name/tag code Q.	Residente Top Applytic	S Operation Record			+ Create
Portraits Segmentations	<ul> <li>Bosic attribute tag gender member level</li> </ul>	Basic Info Tag Name: Stare prefere Tag Status: Enabled	ince	Tag Abbreviation: Store Update Mode: Per I day(s), update to	Tag ID: BQ202111040005 ags automatically befor Data Status: Updated successfully	
Togs Metadatas	<ul> <li>Customer value</li> <li>User points level</li> </ul>	Data Update Time: 08/11 Creation Time: 04/11/20 Tag Desc: Measure user	/2021 1:50 PM 21 2:13 PM s' preference for stores	Tag Type: Preference Tags Creator: Alevin	Tag Group: Preference tag	
窗 Membership 窗 Marketing	User life cycle User value	Tag Rules				
E Coupons Messaging Crders	<ul> <li>RFM model tags</li> <li>Purchase frequency-F</li> <li>Purchase amount-M</li> <li>Purchase interval-R</li> </ul>	* Tog Rules: Che	ck example rget group behavior meet the 2021-01-01.2021-12-31	following requirements           Existed         V	Payment event.	
췹 Settings	<ul> <li>Preference tag</li> <li>S_Tags_birthday</li> <li>Store preference</li> <li>Commodity preference</li> </ul>	* Tag Value Name:	279 V Cumu	lative Occurrences	Mace	
	Commodity preference					

#### Remark:

- 1) After the custom tags, SQL tags, and preference tags are disabled, subsequent automatic updates will stop.
- 2) After the static label is disabled, it cannot be called in the interface

# Step 8: Click the [Update] label button to update the label according to the labeling rules

Techsun						超级管理员 >
<ul> <li>G Home</li> <li>☑ Analytics</li> </ul>	Search tag name/tag code Q	TE Basic Info Tog Ang	livtics Operation Record			+ Create
Portraits     Segmentations     Togs	<ul> <li>Bosic attribute tog gender</li> <li>member level</li> <li>Customer value</li> </ul>	Basic Info Tag Name: Store pr Tag Status: Enabled Data Update Time: Creation Time: 04/1	eference 1 08/11/2021 1:50 PM 1/2021 2:13 PM	Tag Abbreviation: Store Update Mode: Per I day(s), updat Tag Type: Preference Tags Creator: Alevin	Tag ID: 8Q202111040005 te tags automatically befor Data Status: Updated successful Tag Group: Preference tag	lly
Metadatas 1회 Membership 1월 Marketing	User points level User life cycle User value	Tag Desc: Measure Tag Rules * Tag Rules:	users' preference for stores			
된 Coupons Messaging 리 Orders 췹 Settings	RPM model togs     Purchase frequency-F     Purchase amount-M     Purchase interval-R     V Preference tog		Target group behavior meet       2021-01-01,2021-12-31       Attributes     Accurr	the following requirements Existed	Poyment event	
	5_Togs_birthday Store preference Commodity preference Commodity preference	* Tag Value Name:	Store V Cu	mulative Occurrences Top V	Place	

Remark:

- 1) Custom tags, SQL tags, preference tags can be updated manually
- 2) Static tags do not support manual update of tags

## Step 9: Switch [Tag Analytics] TAB page to view historical data of tags



# Step 10: Switch [Operation Record] TAB page to view the historical operation record of the label

Techsun					超级管理员 >
습 Home	Search tag name/tag code Q	Ϋ́			+ Create
条 Customers	+ Create Group	Basic Info Tag Analytics	Operation Record		Update Disable
Portraits	gender	Operator	Operation	Operation Time	
Segmentations	member level	administrator	Disable Tag	23/11/2021 2:13 PM	
Metadatas	<ul> <li>Customer value</li> <li>User points level</li> </ul>	administrator	Enable Tag	23/11/2021 2:13 PM	
窗 Membership	User life cycle	administrator	Update Tag	23/11/2021 2:32 PM	
সি Marketing	User value	administrator	Update Tag	23/11/2021 5:39 PM	
Coupons	Purchase frequency-F	administrator	Update Tag	30/11/2021 3:11 PM	
Orders	Purchase amount-M	administrator	Update Tag	30/11/2021 3:12 PM	
韵 Settings	<ul> <li>Preference tag</li> </ul>			Total 6 piece(s) of	data < 1 > 30 / page >
	S_Tags_birthday				
	Store preference				
	Commodity preference				
	Commodity preference				
:=					

## 7. MEMBERSHIP

#### MEMBERS

## **Function Description:**

1) Mainly manage the information records of all members of the system;

# Step 1: Select the menu bar [Membership] $\rightarrow$ [Members] to enter the member view interface of the loyalty program

Techsun										Alevin
Home	Search by membership co	and numb., Q								+ Create
Customers	Loyalty Program	T Customer Name	Member ID	SocialHub ID	Registration Time 💠	Registration Source	Ŧ	Registration Store	Member Status	Creation Time
Membership	MBrand Loyalty	CharRoin	100000028	OwrthIBHH0U1Evgc	02/12/2021 8:12 PM	Shopify		sun shop	Normal	02/12/2021 8:12 PM
Members	MBrand Loyalty	binbin	100000027	ANsL5EET4yaX7abc	02/12/2021 6:24 PM	Shopify		techsun-saas-test8888	Normal	02/12/2021 6:24 PM
Points	MBrand Loyalty	banbin	100000026	0DJU7TOkgdlqaHEb	02/12/2021 6:04 PM	Shopify		techsun-saas-test8888	Normal	02/12/2021 6:04 PM
Promotion Points	MBrand Loyalty	sunmay	100000025	vDHADzb1H096Wntq	02/12/2021 5:54 PM	Shopify		hqy-test1130-1	Normal	02/12/2021 5:54 PM
Loyalty Configur_	MBrand Loyalty	CharJinney	100000024	ODG3HYiBQYDyWlaT	02/12/2021 5:42 PM	Shopify		sun shop	Normal	02/12/2021 5:42 PM
Marketing	MBrand Loyalty	黄泡试00001	100000023	zU9m1ZliXjSB2u5e	02/12/2021 5:42 PM	Shopify		hqy-test3	Normal	02/12/2021 5:42 PM
Coupons	MBrand Loyalty	高騰	100000022	F4EUkPZwJXkTqy5y	02/12/2021 5:42 PM	Shopify		hqy-test3	Normal	02/12/2021 5:42 PM
Messaging Orders	MBrand Loyalty	荑秋怕	1000000021	sdzQVyt9bicWXFgh	02/12/2021 2:02 PM	Shopify		hqy-testl	Normal	02/12/2021 2:02 PM
Settings	MBrand Loyalty	模棱	100000020	FmijdvjTKd6fS24T	02/12/2021 2:02 PM	Shopify		hqy-testl	Normal	02/12/2021 2:02 PM
	MBrand Loyalty	明台	100000019	DqkiuMIW2dxAe0iw	02/12/2021 2:02 PM	Shopify		hqy-testl	Normal	02/12/2021 2:02 PM
	MBrand Loyalty	我的测试	100000018	XMYnwaBMoGmNIRIZ	02/12/2021 2:02 PM	Shopify		hqy-test!	Normal	02/12/2021 2:02 PM
						Total 228 piece(s) of data		< 1 2 3 4 5 6	7 8 >	30 象/页 > 跳至

### Instruction Manual:

1) Support search query by member ID;

## Step 2: Click on the specific member Code to view the member details

Techsun												Alevin v	
ය Home	Home > Membership > Meml	bers > Details											
Analytics	Basic Info Third-party Account Member Order Coupon Behavior Record WeChat Record SMS Record												
冬 Customers	Basic Info	Basic Info											
Members	Loyalty Program: MBr	and Loyalty				N	lember ID:	100000456					
Points	SocialHub: 191x37jcOj Registration Source: 1	3zvKAI Shopify				C	ustomer N egistratior	Name: Glen Smith n Time: 05/11/2021 3:	53 PM				
Basic Points Rules	Registration Store: sd	Registration Store: sdwebsite Member Status: Normal											
Promotion Points	First Purchase Time: 2021-11-0516:52:12 Recent Purchase Time: 2021-11-0516:52:12 Accumulated points for judging relegation: 68 Consumption amount for judging relegation: 0												
Marketing	Consumption times for	or judging relega	tion(Within tier valic	dity) : 0		c	hannel Ma	ark: n Time: 05/11/2021 4	-52 DM				
Coupons	creator nine. com	20210.0011					lounioutor		NO2 1 191				
Messaging	Tier Change Record												
Crders	Tier Name	Customer Name	Member ID	Tier ID	Tier Type	Change T	ype Tier	r Rules	Tier Effective Time	Tier Expiry Time	Tier Status	Creatio	
<u> </u> Settings	Card member	Glen Smith	100000456	Card member	Basis	Automatic	,		05/11/2021 3:53 PM		Effective	05/11/2	
										Total 1 piece(s) of data <	1 > 30	条/页∨	
	Point Account												
=	Point Group		Customer Name	Member ID		Accumulated	Points	Usable Points	Expired Points	Creation Time			

Step 3: You can query the membership tier change record information through the member account details

Techsun										Alevin 🗸	
ය Home	Home > Membership > Members > De	otails									
Analytics	Basic Info Third-party Account	t Member Order	Coupon Behavior Re	cord WeCh	at Record SMS Reco	ord					
Membership	Basic Info										
Members	Loyalty Program: MBrand Loya	ilty			Member IE	D: 1000000456					
Points	SocialHub: I9hx37jcOj3zvKAI				Customer	Name: Glen Smith	DM				
Basic Points Rules	Registration Store: sdwebsite				Member S	Member Status: Normal					
Promotion Points	First Purchase Time: 2021-11-0	5 16:52:12			Recent Pu	rchase Time: 2021-11-05	16:52:12				
Loyalty Configur	Accumulated points for judgin	g relegation: 68			Consumpt	tion amount for judging	relegation: 0				
W Marketing	Consumption times for judging Creation Time: 05/11/2021 3:53	g relegation(Within tier vali PM	dity) : 0		Channel M Modificatio	Channel Mark: Modification Time: 05/11/2021 4:52 PM					
El Coupons											
Messaging	Tier Change Record										
G Orders	Tier Name Custor Name	mer Member ID	Tier ID	Tier Type	Change Type Tie	er Rules	Tier Effective Time	Tier Expiry Time	Tier Status	Creatie	
fill Settings	Card member Glen S	mith 100000456	Card member	Basis	Automatic		05/11/2021 3:53 PM		Effective	05/11/2	
								Total 1 piece(s) of data <	1 > 30	祭/页∨	
	Point Account										
:=	Point Group	Customer Name	Member ID		Accumulated Points	Usable Points	Expired Points	Creation Time			

Step 4: Inquire about member points account information through member account details

Techsun											Alevin 🗸	
	Loyalty Program: MBr	and Loyalty				Membe	ID: 1000000456					
ය Home	SocialHub: 191x37jcOj	3zvKAI				Custom	er Name: Glen Smith					
Analytics	Registration Source:	Shopify				Registro	Registration Time: 05/11/2021 3:53 PM					
冬 Customers	Registration Store: sd	website				Membe	Member Status: Normal					
	First Purchase Time: 2	2021-11-05 16:52:12	2			Recent	Recent Purchase Time: 2021-11-05 16:52:12					
Membership	Accumulated points f	or judging relego	ition: 68			Consum	Consumption amount for judging relegation: 0					
Members	Consumption times fo	or judging relega	tion(Within tier valid	ity) : 0		Channe	Channel Mark:					
Points	Creation Time: 05/11/	2021 3:53 PM				Jification Time: 05/11/2021 4:52 PM						
Basic Points Rules	Tier Change Record	Tier Change Record										
Promotion Points	Tier Name	Customer Name	Member ID	Tier ID	Tier Type	Change Type	Tier Rules	Tier Effective Time	Tier Expiry Time	Tier Status	Creati	
Marketing	Card member	Glen Smith	100000456	Card member	Basis	Automatic		05/11/2021 3:53 PM		Effective	05/11/2	
Coupons									Total 1 piece(s) of data <	1 > 30	奈/页∨	
Messaging	Point Account											
Crders	Point Group		Customer Name	Member ID		Accumulated Points	Usable Points	Expired Points	Creation Time			
角 Settings			01 014-	1000000450		50.00	00.00		05/11/0001 0.50 014			
	integral value		Gien Smith	100000455		68.00	68.00	0.00	05/11/2021 3:53 PM			
	growth value		Glen Smith	1000000456		0.00	0.00	0.00	05/11/2021 3:53 PM			
									Total 2 piece(s) of data <	1 > 30	条/页∨	

Step 5: Through the member account, you can check the binding information of the member and each channel

Techsun		Alevin ~
ය Home	Home > Membership > Members > Details	
Analytics	Basic Info Third-party Account Member Order Coupon Behavior Record WeChat Record SMS Record	
冬 Customers	Basic Info	
Members	Store: sdwebsite Account Type: Express Official Website Account	
Points	Third-party Account ID: *****244 # Third-party Account Nickname: *****244 # Bloding Time: 05/11/2021 353 PM	
Basic Points Rules	Unbinding Time: Creation Time: 05/11/2021 3:53 PM	
Promotion Points	Modification Time: 05/11/2021 3:53 PM	
W Marketing		
Coupons		
Messaging		
fi Settings		
- 100 - 100		

Step 6: Inquire about member orders information through member order

Techsun											,	Alevin ~
û Home	Home > Membership >	Members > Details										
<ul> <li>Analytics</li> <li>A Customers</li> </ul>	Basic Info Third	-party Account	lember Order	Coupon E	Behavior Recor	d WeChat Record	SMS Record					
🖄 Membership	Order ID	Customer Nar	me Member ID	Order Type	Order Direction	Source Channel	Order Date	Store	Store ID	Receivable Amount(Facevalue)	Total Discount Amount(Discount)	Receiv Net Vo
Members	order2030000243	Glen Smith	100000456	Take-out	Standard Order	NEWPOS	06/11/2021 8:32 P M	SG Central Store	SG Central	\$66.00	\$0.00	\$66.00
Points									Te	otal 1 piece(s) of data	< 1 > 30 ±	鞅/页∨
Basic Points Rules												
Promotion Points												
Loyalty Configur												
Coupons												
Messaging												
Crders												
뤕 Settings												

Step 7: The coupon information obtained by the member can be inquired through the member account

Techsun							Alevin ~
ය Home	Home > Membership > Members > Deta	ils					
Analytics	Basic Info Third-party Account	Member Order Coupon	Behavior Record WeChat	Record SMS Record			
糸 Customers		Coupon Coupon	Coupon Customer	Coupon	Consumption	Consumption	Related Marketina
ත් Membership	Coupon ID Coupon Ru	le ID Name Type	Content Name	Member ID Status	Claim Time Time	Order ID Order Amount	Campaign Name
Members	5361421549323706 20211201000	002	Glen Smith	1000000456 Issued	02/12/2021 10:3 8 AM	\$0	
Points						Total 1 piece(s) of data < 🔳	> 30 祭/页∨
Basic Points Rules							
Promotion Points							
Loyalty Configur							
₩ Marketing							
Coupons							
Messaging							
Crders							
fi Settings							

Step10: through the member account can query the member's behavior information

Techsun							Alevin $\vee$
습 Home	Home > Membership > M	embers > Details					
<ul><li>Analytics</li><li>み Customers</li></ul>	Basic Info Third-p	arty Account Member Or	der Coupon Beha	WeChat Record	SMS Record		
ත් Membership	Full Name	Customer Memb Name	er ID Behavior Type	Source Channel	Occurred Channel	Occurred Time	Changed Tier Creation Tim
Members	Purchase	Glen Smith 100000	0456 Purchase	POS		05/11/2021 4:52 PM	05/11/2021 4:5
Points	First Purchase	Glen Smith 100000	0456 First Purchase	POS		05/11/2021 4:52 PM	05/11/2021.4:5
Basic Points Rules	Registration	Glen Smith 100000	0456 Registration	Express Official Website		05/11/2021 3:53 PM	05/11/2021 3:5
Promotion Points						Total 3 piece	(s) of data < 1 > 30 条/页 >
W Marketing							
E Coupons							
Messaging							
Orders							
凸 Settings							
:=							

Step11: through the member account, you can query the WeChat message notification information of reaching the member

									Alevin v			
Home > Membership > Poi	Home > Membership > Points > Details											
Basic Info Point Sta	stement											
Point Group	Point Account	Point Group	Point Record Source	Point Operation Type	Point Direction	Variation Value of Points	Usable Point Balance of This Order	Total Variation Value of Points	Join in Upgrad			
交易积分	Integral value	Integral value	POS	Order Promotion Point	Add	2.00		2.00	Yes			
交易积分	Integral value	Integral value	POS	Order Points	Add	66.00		66.00	Yes			
							Total 2 piece(s	) of data < 📘 >	30 奈/页∨			
	Home > Membership > Point Str Point Group 오용자가 오용자가	Home : Membership : Points : Details           Basic Info         Peint Statement           Point Group         Point Account           오용R3?         Integral value           오용R3?         Integral value	Rome - Membership : Points - Details         Basic Info       Point Statement         Point Group       Point Account       Point Group         SSR03       Integral value       Integral value         SSR03       Integral value       Integral value	Rome + Membership + Points + Details         Basic Info       Point Statement         Point Group       Point Account       Point Group       Point Account         2/859       Integral value       Integral value       POS         2/859       Integral value       Integral value       POS	Rome - I Membership - Points - Details         Rostic Info       Point Statement         Point Group       Point Account       Point Group       Point Operation Type         208F07       Integral value       POS       Order Promotion Point         208F07       Integral value       Integral value       POS       Order Promotion Point         208F07       Integral value       Integral value       POS       Order Points	Rome > Mamberthip > Points > Details         Basic Info       Point Statement         Point Group       Point Account       Add         2.8563       Integral value       Integral value       POS       Order Points       Add	Rome + Mambership - Points > Details         Point Group       Point Grou	Rome + Membership + Points > Details           Bosic Info         Point Statement         Point Operation Type         Point Make of Direction         Valiation Value of Points Bolance of This Order           258783         Integral value         Integral value         POS         Order Proints         Add         66.00         Totol 2 piece(stresses)	Reint Statement         Point Group       Point Account       Point Group       Point Group       Point Group       Point Group       Point Account       Point Group       Point Record Source       Point Operation Type       Point Order Points       Variation Value of This Order       Otdols Point Biology         RBRD       Integral Value       Integral Value       POS       Order Points       Add       6600       6600         RBRD       Integral Value       Integral Value       POS       Order Points       Add       6600       6600			

## POINTS

## **Function Description:**

- 1) Support the generation of corresponding member points accounts according to the points groups configured in the loyalty program;
- 2) Points account includes the following information: accumulated points, available points, expired points;
- 3) The calculation formula of each integral value:
- Accumulated points = orders points + orders promotion points + manual points adjustment increase-manual points adjustment points decrease-return points reversal + behavior increase points; (the above is the type of points record);
- Available points = orders points + orders promotion points + manual points adjustment increase-manual points adjustment points reduction-return points reversal + behavior increase points-behavior reduction points-points redeem gifts + points redeem cancel points return-points expire-points redeem coupons ; (The above is the type of points record);
- Expired points = points expired;

# Step 1: Select the menu bar [Membership] $\rightarrow$ [Points] to enter the point account view interface

Techsun								Alevin ~
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by name	٩						
条 Customers	Point Group	Customer Name	Member ID	Accumulated Points	Usable Points	Expired Points	Creation Time	
· Membership	Integral value	CharRain	100000028	0.00	0.00	0.00	02/12/2021 8:12 PM	
Members	growth value	CharRain	100000028	0.00	0.00	0.00	02/12/2021 8:12 PM	
Points	Integral value	binbin	100000027	0.00	0.00	0.00	02/12/2021 6:24 PM	
Promotion Points_	growth value	binbin	100000027	0.00	0.00	0.00	02/12/2021 6:24 PM	
Loyalty Configur	Integral value	banbin	100000026	0.00	0.00	0.00	02/12/2021 6:04 PM	
W Marketing	growth value	banbin	100000026	0.00	0.00	0.00	02/12/2021 6:04 PM	
Coupons	Integral value	sunmay	100000025	0.00	0.00	0.00	02/12/2021 5:54 PM	
Orders	growth value	sunmay	100000025	0.00	0.00	0.00	02/12/2021 5:54 PM	
酌 Settings	Integral value	CharJinney	100000024	0.00	0.00	0.00	02/12/2021 5:42 PM	
	growth value	CharJinney	100000024	0.00	0.00	0.00	02/12/2021 5:42 PM	
	Integral value	黄源时式00001	100000023	0.00	0.00	0.00	02/12/2021 5:42 PM	
					Total 526 piece(s) of data	< 1 2 3 4	5 … 18 > 30 豪/页 ~	就至 页

## Instruction Manual:

1) Support search query by name;

## Step 2: Click on the specific points account to view the points account details

	Techsun	Ale	avin ~
6	Home	Home > Membership > Points > Details	
6	3 Analytics	Basic Info Point Statement	
Ą	Customers	Basic Info	
5	1 Membership		
	Members	Point Group: Integral value Customer Norme: CharRain	
	Points	Member ID: 100000028 Accumulated Points: 0.0 Incelle Boster: 0.0 Constitution Points: 0.0 Consti	
	Basic Points Rules	Openier remain         Openin         Openier remain         Openier remain<	
	Promotion Points		
	Loyalty Configur		
v	Marketing		
E	3 Coupons		
E	3 Messaging		
E	3 Orders		
đ	1 Settings		

Step3: You can check the points detail record through the points account details

Techsun											Alevin v
ය Home	Hom	e > Membership > F	Points > Details								
Analytics	B	asic Info Point	Statement								
Membership		Point Group	Point Account	Point Group	Point Record Source	Point Operation Type	Point Direction	Variation Value of Points	Usable Point Balance of This Order	Total Variation Value of Points	Join in Upgrad
Members											
Points						智无数据					
Basic Points Rules											
Promotion Points											
Loyalty Configur_											
网 Marketing											
E Coupons											
Messaging											
G Orders											
fit Settings											
:=											

## **Remark:**

1) Provide order interface and points calculation engine services, support the calculation of points according to the basic points rules;

- 2) Provide external behavior interface, support to obtain points through activities (such as external check-in points);
- 3) Provide behavioral marketing rules and support the triggering of behavioral rules to obtain points;
- 4) Provide batch marketing rules to support batch gifting of points for a specific group of people;
- 5) Points types include: orders points (plus), orders promotion points (plus), manual points adjustment increase (plus), manual points adjustment point decrease (decrease), points exchange for gifts (decrease), points exchange coupons (decrease), behavior Increase points (plus), behavior decrease points (minus), return points offset (minus), points redemption cancel points return (plus), points expire (minus);
- 6) Each point change needs to trigger the update of the points information on the member points account, and the relevant fields are updated according to the formula; the orders points are calculated according to the (calculation of points amount) in the order details;

Techsun										SuperAdmin v
မ် Home	Home > Membe	rship > Points > Detoils								
Analytics	Basic Info	Point Statement								
🖄 Membership	Point Grou	p Point Account	Point Group	Point Record Source	Point Operation Type	Point Direction	Variation Value of Points	Usable Point Balance of This Order	Total Variation Value of Points	Join in Upgrad
Members	交易积分	Integral value	Integral value	POS	Order Points	Add	58.00		58.00	Yes
Points	交易积分	Integral value	Integral value	POS	Order Points	Add	26.00		26.00	Yes
Bosic Points Rules	交易积分	integral value	Integral value	POS	Order Points	Add	33.00		33.00	Yes
Loyalty Configur	交易积分	Integral value	Integral value	POS	Order Promotion Point	Add	2.00		2.00	Yes
Marketing	交易积分	Integral value	Integral value	POS	Order Points	Add	25.00		25.00	Yes
Coupons	交易积分	Integral value	Integral value	POS	Order Promotion Point	Add	2.00		2.00	Yes
<ul> <li>Messaging</li> <li>Orders</li> </ul>	交易积分	Integral value	Integral value	POS	Order Points	Add	66.00		66.00	Yes
f Settings								Total 7 piece(	s) of data < 🔳 🗇	30 祭/页 >
1										

## Step 4: Click on the specific points record to view the points details

Techsun			SuperAdmin 🗸						
ක Home	Home > Membership > Points > Details								
Analytics	Basic Info Related Info Point Relation								
条 Customers	Basic Info								
Members	Point Group: 交易积分	Point Account: Integral value							
Points	Point Record Source: POS	Point Operation Type: Order Promotion Point							
Basic Points Rules	Variation Value of Points : 2.00	Usoble Point Balance of This Order : 2.00							
Promotion Points	Effective Time: 05/11/2021 5:03 PM Total Variation Value of Points: 2.00	Expiry Time: 05/11/20221:59 PM Join in Upgrade: Yes							
Loyalty Configur	Related Marketing Campaign Name :	Creation Time: 05/11/2021 5:03 PM							
E Coupons	Modification Time: 05/11/2021 5:03 PM								
Messaging									
Contract									
<u>n</u> settings									
:=									

Step 5: You can view the reason for the points generated through the associated information

Techsun			SuperAdmin v						
ය Home	Home > Membership > Points > Details								
<ul><li>Analytics</li><li>冬 Customers</li></ul>	Bosic Info Related Info Point Relation								
🖄 Membership	Related Info								
Members	Basic Points Rules:	Promotion Points Rules: Double Eleven Promotion							
Points	Cost Center:	Order: order2030000445							
Basic Points Rules	Behavior Record:	Bulk Marketing Campaign:							
Promotion Points	Behavior Marketing Campaign:	Related Marketing Campaign Name :							
Loyalty Configur									
W Marketing									
E Coupons									
Messaging									
Orders									
fi Settings									
1									

Step 6: You can view the relationship that generates the point deduction through the point relationship

	Techsun					SuperAdmin ~	
6	Home	Home > Membership > Points > Detoils					
5	Analytics	Basic Info Related Info Point Relation					
ť	/ Membership	ID	Point Group	Target Point Record	Point Value	Creation Time	
	Members						
	Points						
	Basic Points Rules						
	Loyalty Configur						
V	Marketing						
В	3 Coupons						
E	3 Messaging						
E	3 Orders						
Ē	1 Settings						

## **Remark:**

- 1) The point relationship record is used as the basis for the system to record the related sources of points use. When the points are used, the system follows the first-in first-out deduction principle;
- 2) First-in-first-out concept: Points with the first valid period will be deducted first, and if the valid periods are the same, the points with the first creation time will be deducted first;
- 3) Points returned:
- Provides a refund interface. When a refund occurs, it needs to be traced back based on whether the original order has generated points. If the original order has gift points, the points need to be deducted, and if the original order has used points, the points need to be returned;
- Each point change needs to trigger the update of the point information on the member points account and member user table, and the relevant fields are updated according to the formula;
- When the order is used for points, the points need to be returned retrospectively according to the point relationship when returning the order. The validity period of the returned points is assigned according to the validity period of the source point record. When the source point record has expired, the returned points plus 1 day will be the new validity period;

#### 主页 / 积分中心 / 积分关系 / 详情 Techsun **B** 基础信息 源积分 🖂 数据分析 积分关系记录 积分值 為 用户中心 名称 -30 ② 会员中心 目标积分记录 积分兑换卡券 会员账号 积分账号 创建时间 2021-03-23 14:19:14 修改时间 2021-03-23 14:19:14 基础积分规则 促销积分规则 忠诚度配置 河 营销MA □ 卡券中心 ☑ 滴息中心 □ 交易中心 **血** 企业设置

# Step 2: Click on the specific point relationship to view point deduction information

# Step3: You can view the source information of the points deduction by viewing the source points of the point relationship

Techsun	主页 / 肥分中心 / 肥分关系 / 详情	<b>–</b> (8)
	基础信息 <b>通积分</b>	
🗹 数据分析		
み 用户中心	源积分	积分值
◎ 会员中心	00170000-0000-0570-8034-f17858976acc	-30
会员账号		显示1至1共1条 < > 15条/页 <
积分账号		
基础积分规则		
促销积分规则		
忠诚度配置		
河 营销MA		
□□ 卡券中心		
☑ 消息中心		
🗖 交易中心		
▲ 企业设置		

## WHAT ARE THE POINTS RULES

Provide points rules and points engine, deal with points calculation, including point increase, point deduction, point redemption, point expiration, and manage the member's point account, point record, and point relationship;

### BASIC POINTS CALCULATION ENGINE

name	Method to	Main business logic
	realize	
Basic	Positive	1. Provide the points calculation queue to the
Points	single	front end, after the front-end orders is completed,
Engine	processing	transfer the order to the points calculation queue
		2. According to the orders information, the
		actual received amount will be apportioned
		according to the order details;
		3. Determine whether the membership level
		complies with the rules;
		4. Determine whether the product complies with
		the rules;
		5. Determine whether the order store complies
		with the rules;
		6. Determine whether the discount complies
		with the rules;
		7. How to calculate points: According to the
		quantity of the product or the amount of the
		order
		8. Get the calculation formula, 1 yuan 1 point or
		1 unit of 1 point;
		9. Get points validity period mode
		10. Calculate points based on the final result;

	11.	Create	points	records,	update	the
	ac	cumulated	l points a	nd available	e points on	the
	рс	oints accou	ınt;			
Chargeback	1.	The front	-end orde	r channel se	ends the ret	fund
processing	det	tails to the	Social Hu	b back offic	e;	
	2.	Social Hu	b creates o	order return	order deta	ils
	3.	Determin	e whether	this charge	back stater	nent
	has	s earned b	asic points	S		
	4. poi nee poi	If you ge int record, ints you h ed to retu ints)	et the bas and retur ave obtain urn it if y	sic points, o rn it accordi ned (otherw you don' t	create a re ing to the k rise, you do get the k	turn basic ní t basic
	5. poi	Update th ints on the	ne accumu e points ac	ulated point count;	s and avail	able

## BASIC POINTS RULES

## **Function Description:**

- 1) Supports the definition of basic points rules in the system, and supports the definition of the following types of rules:
- Support the definition of basic points under different levels;
- Support the definition of basic points under different stores and commodities (commodity Product Categories) as the conditions for obtaining points; support the definition of accumulation of points for different member points accounts;
- Support to define the calculation method of points (according to the amount X yuan = 1 point\according to the number of products X unit = 1 point);
- Support to define whether the points can participate in the upgrade calculation;
- Support the configuration of discount limit, when the actual payment/original price ≥ discount limit, points will be given

• Support to define the validity period of points (fixed date, fixed period), fixed date needs to be set: validity period (X) year, month, date; fixed period needs to be set: validity period (X) days;

# Step 1: Select the menu bar [Membership] $\rightarrow$ [Basic Points Rules] to enter the integration rules view interface

Techsun														wenwen v
ය Home		/rule code C											-	- Create
Analytics														
条 Customers	Point Rule Name	Point Rule ID	Loyalty Program	Obtaining Way	Point Group	Point/Yu an	Point/A Product	Join in Upgrade	Basic Point Validity Type	Applicable Products	Applicable Stores	Creation Time	Opera	tion
窗 Membership	diamond member points rules	2021110200004	MBrand Loyalty	Order Amo unt	Integral value	2		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:08 PM	Edit	Delete
Members	Platinum member points rules	2021110200003	MBrand Loyalty	Order Amo unt	Integral value	2		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:07 PM	Edit	Delete
Points	Gold member poi nts rules	2021110200002	MBrand Loyalty	Order Amo unt	Integral value	1		Yes	Fixed Duration	All product	All stores	02/11/2021 3:06 PM	Edit	Delete
Promotion Points.	Card member poi nts rules	2021110200001	MBrand Loyalty	Order Amo unt	Integral value	j.		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:05 PM	Edit	Delete
Loyalty Configur_											Total 4 p	siece(s) of data < 🚺	) > 30	/ page v
W Marketing														
El Coupons														
Messaging														
G Orders														
fl Settings														

Instruction Manual:

1) Support search query by rule name;

## Step 2: Click the [Create] button

Techsun													wenwer
Home	Search by rule name	/rule code     Q											+ Creat
Analytics													L
Customers	Point Rule Name	Point Rule ID	Loyalty Program	Obtaining Way	Point Group	Point/Yu an	Point/A Product	Join in Upgrade	Basic Point Validity Type	Applicable Products	Applicable Stores	Creation Time	Operation
Membership	diamond member points rules	2021110200004	MBrand Loyalty	Order Amo unt	Integral value	2		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:08 PM	Edit Delete
Members	Platinum member points rules	2021110200003	MBrand Loyalty	Order Amo unt	Integral value	2		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:07 PM	Edit Delete
Points	Gold member poi nts rules	2021110200002	MBrand Loyalty	Order Amo unt	Integral value	1		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:06 PM	Edit Delete
Promotion Points	Card member poi nts rules	2021110200001	MBrand Loyalty	Order Amo unt	Integral value	ī.		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:05 PM	Edit Delete
Loyalty Configur_											Total 4 p	iece(s) of data < 🚺	) 30 / page
Marketing													
3 Coupons													
3 Messaging													
3 Orders													
1 Settings													

Step 3: After entering specific information on the creation page, click Save

Techsun		wenwen v
ය Home	Home > Membership > Bosic Points Rules > Create	
Analytics	Basic Info	
条 Customers		
🖄 Membership	* Point Rule Nome: Please enter	
Members	* Loyalty Program: Please select V	
Points	* Cost Center: Please enter cost cente Y	
Basic Points Rules	Applicable Conditions	
Promotion Points	Tier: Places enter tier name V	
Loyalty Configur	* Applicable Products:      Usoble for all products	
聞 Marketing	Usoble for specific products	
El Coupons	* Applicable Stores:      (a) Usable for all stores	
Messaging	Discount Limit: When products paid amount/original price 2 Please enter give points	
G Orders		
島 Settings	Point Validity	
	Point Group: Please enter point grou	
	* Obtaining Way : 🔘 Order Amount 👘 Product Quantity	
	* Basic Point Validity Type:  Fixed Date  Fixed Duration	
12	Concel	

Step 4: Complete the creation of the points rules

100

	Techsun														wenwen v
G	) Home	Search by rule name	/rule code C											[+	- Create
8	3 Analytics	Point Rule Name	Point Rule ID	Loyalty Program	Obtaining	Point	Point/Yu	Point/A Product	Join in Upgrade	Basic Point Validity	Applicable Products	Applicable	Creation Time	Operat	ion
19	Membership	diamond member points rules	2021110200004	MBrand Loyalty	Order Amo	Integral	2		Yes	Fixed Duration	All product	All stores	02/11/2021 3:08 PM	Edit	Delete
	Members	Platinum member points rules	2021110200003	MBrand Loyalty	Order Amo unt	Integral value	2		Yes	Fixed Duration	All product	All stores	02/11/2021 3:07 PM	Edit	Delete
	Points	Gold member poi nts rules	2021110200002	MBrand Loyalty	Order Amo unt	Integral value	1		Yes	Fixed Duration	All product	All stores	02/11/2021 3:06 PM	Edit	Delete
	Promotion Points	Card member points rules	2021110200001	MBrand Loyalty	Order Amo unt	Integral value	ĩ		Yes	Fixed Duration	All product s	All stores	02/11/2021 3:05 PM	Edit	Delete
	Loyalty Configur											Total 4 pi	ece(s) of data < 🔳	> 30	/ page ~
V	Marketing														
3	3 Coupons														
E	3 Messaging														
E	3 Orders														
f	1 Settings														

#### PROMOTIONAL POINTS RULE CALCULATION ENGINE

name	Method to	Main business logic
	realize	
Promotiona	Positive	1. Provide the points calculation queue to the
l Points	single	front end, after the front-end orders is
Engine	processing	completed, transfer the order to the points
		calculation queue
		2. According to the orders information, the
		actual received amount will be apportioned
		according to the order details;
		3. Determine whether the order time complies
		with the rules;
		4. Judge whether the crowd conforms to the
		rules;
		5. Determine whether the product complies with
		the rules;
		6. Determine whether the order store complies

	with the rules;
7	. Determine whether the discount complies
	with the rules;
8	Judge whether the points threshold complies
	with the rules;
9	. Determine whether to participate in this
	promotion point rule repeatedly
	10. Get points validity period mode
	11. How to get points calculation: according to
	whether the amount is full or the amount is full
	12. Get the calculation formula:
	The properties prints will support whether to
	i) The promotion points rule supports whether to
	promotion points rule doos not support the
	superposition then the calculation matches the
	maximum points rule to give points
1	Some rules support stacking first compare the
	maximum rule points that do not support
	stacking rules and give them together with the
	stacking rules, and give them together with the
	Some rules support stacking first compare the
	maximum rule points that do not support
	stacking rules and give them together with the
	stacking rules, and give them together with the
	stacking rule points
	1. The bonus points will be apportioned in
	proportion to the order amount or product data,
	and the bonus points details will be recorded
	2. Update the accumulated points and available

	points on the points account;
Chargeback	1. The front-end order channel sends the refund
processing	details to the Social Hub back office;
	2. Social Hub creates order return order details
	3. Determine whether this chargeback statement
	has earned promotional points
	4. If you have obtained promotional points,
	create a return point record, and return them
	according to the details of the obtained
	promotional points (otherwise, if you did not get
	the promotional points, or when the rule points
	threshold is a fixed value for gift, after the return,
	the points still meet the promotional points, you
	don't need to return them )
	5. Update the accumulated points and available
	points on the points account;

## PROMOTIONAL POINTS RULES

## **Function Description:**

- 1) Supports the definition of promotional points rules in the system, and supports the definition of the following types of rules:
- Support the definition of promotion points rules under different levels;

- Support the definition of points earning activity time, target marketing lists of different groups, different stores, and promotion points rules under different products (commodity Product Categories) as conditions for earning points;
- Support the definition of points calculation method (according to fixed amount full/according to data full) to give fixed points/gift (x) points/yuan ;
- Support the configuration of discount limit, when the actual payment/original price ≥ discount limit, points will be given
- Support to define whether the points can participate in the upgrade calculation;
- Support to configure whether this integral rule can be used with other promotional integral rules
- Support to configure whether users can participate in this integral rule repeatedly
- Support configuration of multiple points groups
- Support to define the validity period of points (fixed date, fixed period), fixed date needs to be set: validity period (X) year, month, date; fixed period needs to be set: validity period (X) days;

# Step 1: Select the menu bar [Point Center] $\rightarrow$ [Promotion Point Rules] to enter the point rule view interface

Techsun									SuperAdmin v
<ul> <li>Analytics</li> </ul>	Search by point rule name or	rule n_ Q							+ Create
条 Customers	Point Rule Name	Point Rule Code	Point Threshold	Obtaining Way	Approval Status	Point Rule Status	Point Group	Creation Time	Operation
🖄 Membership	Double Eleven Promotion	2021112600001	Amount Reached 100 yuan	Gift2Point/A Product	Approved	List	Integral value	26/11/2021 10:15 AM	Unlist Copy
Members	Double Eleven Promotion	2021110200001	No Data Available	Gift2Point/A Product	Approved	Unlist	Integral value	02/11/2021 3:09 PM	List Copy
Points								Total 2 piece(s) o	f data < 1 > 30 / page >
Basic Points Rules									
Promotion Points									
Loyalty Configur									
El Coupons									
Messaging									
C Orders									
f Settings									
12									

## Instruction Manual:

1) Support search query by rule name, or filter data by filter conditions;

## Step 2: Click the [Create] button

	Techsun									SuperAdmin v
6	Analytics	Search by point rule name or	rule n., Q							+ Creote
8	A Customers	Point Rule Name	Point Rule Code	Point Threshold	Obtaining Way	Approval Status	Point Rule Status	Point Group	Creation Time	Operation
E.	Membership	Double Eleven Promotion	2021112600001	Amount Reached 100 yuan	Gift2Point/A Product	Approved	List	Integral value	26/11/2021 10:15 AM	Unlist Copy
	Members	Double Eleven Promotion	2021110200001	No Data Available	Gift2Point/A Product	Approved	Unlist	Integral value	02/11/2021 3:09 PM	List Copy
	Points								Total 2 piece(s) a	of data < 1 > 30 / page >
	Basic Points Rules									
	Promotion Points									
	Loyalty Contigur									
E	Coupons									
E	2 Messaging									
e	G Orders									
B	1 Settings									

Step 3: After entering specific information on the creation page, click Save

Techsun		SuperAdmin v
ය Home	Home > Membership > Promotion Points Rules > Create	
Analytics	Basic Info	
条 Customers		
🖄 Membership	Point Rule Name: Please enter	
Members	Loyolty Program: Place enter members	
Points	Cost Center: Please enter cost cente	
Basic Points Rules	Applicable Conditions	
Promotion Points	Composion Time: Stort date - End date - P	
Loyalty Configur	Target Marketing List: Please enter name to s Y Create Group	
Marketing	* Applicable Products:      Usable for all products	
E Coupons	<ul> <li>Usable for specific products</li> </ul>	
Messaging	Applicable Stores:     Usable for all stores	
Crders	Point Threshold: Please select thre_ V	
ff1 Settings	Discount Limit: When products paid amount/original price ≥ Please ent give points	
	Reward	
	Point Group: Please enter point grou_	
:==	Cancel Save draft Submit for approving	

**Step 4: Complete the creation of promotional points rules** 

Techsun									SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by point rule name o	r rule n Q							+ Create
条 Customers	Point Rule Name	Point Rule Code	Point Threshold	Obtaining Way	Approval Status	Point Rule Status	Point Group	Creation Time	Operation
🖄 Membership	Double Eleven Promotion	2021112600001	Amount Reached 100 yuan	Gift2Point/A Product	Approved	List	Integral value	26/11/2021 10:15 AM	Unlist Copy
Members	Double Eleven Promotion	2021110200001	No Data Available	Gift2Point/A Product	Approved	Unlist	Integral value	02/11/2021 3:09 PM	List Copy
Points								Total 2 piece(s)	of data < 1 > 30 / page∨
Basic Points Rule	15								
Promotion Point									
W Marketing									
El Coupons									
Messaging									
G Orders									
A Settings									
100									

## Step 5: Approve & edit the rules & manage the release & removal & delete

Techsun									SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by point rule name or	rule n Q							+ Create
条 Customers	Point Rule Name	Point Rule Code	Point Threshold	Obtaining Way	Approval Status	Point Rule Status	Point Group	Creation Time	Operation
🖄 Membership	Double Eleven Promotion	2021112600001	Amount Reached 100 yuan	Gift2Point/A Product	Approved	List	Integral value	26/11/2021 10:15 AM	Unlist Copy
Members	Double Eleven Promotion	2021110200001	No Data Available	Gift2Point/A Product	Approved	Unlist	Integral value	02/11/2021 3:09 PM	List Copy
Points								Total 2 piece(s) a	f data < 1 > 30 / page >
Basic Points Rules									
Promotion Points.									
W Marketing									
El Coupons									
Messaging									
G Orders									
創 Settings									

Step 6: Click [Point Rule Name] to view the basic information of promotional points rule

lome		nden, Q								+ Crec
Analytics										
Customers	Point Rule Name	Point Rule Code	Point Threshold	Obtaining Way	Approval Status	Point Rule Status	Point Group	Creation Time	Operati	on
Membership	Double Eleven Promotion	2021112600001	Amount Reached 100 yuan	Gift2Point/A Product	Approved	List	Integral value	26/11/2021 10:15 AM	Unlist	Сору
Members	Double Eleven Promotion	2021110200001	No Data Available	Gift2Point/A Product	Approved	Unlist	Integral value	02/11/2021 3:09 PM	List C	ору
oints								Total 2 piece(s)	of data < 🔳 🗇	30 / page
lasic Points Rules										
romotion Points										
oyalty Configur										
Marketing										
Coupons										
Messaging										
Orders										
Settings										
Techsun										SuperAdm
Techsun	Home > Membership > Promotion	n Points Rules > <b>Details</b>								SuperAdm
Techsun Home Analytics	Home > Membership > Promotion	n Points Rules > <b>Details</b>								SuperAdmi
Techsun Iome Analytics Customers	Home > Membership > Promotion	n Points Rules > <b>Details</b> rd								SuperAdm
Techsun Iome Analytics Customers Membership	Home > Membership > Promotion Basic Info Basic Info	n Points Rules > <b>Details</b> rd								SuperAdm
Techsun Home Analytics Customers Membership	Home > Membership > Promotion Basic Info Basic Info Point Rule Name: Double	n Points Rules > <b>Details</b> rd Eleven Promotion			Point Rul	e Code: 2021112600000				SuperAdm
Techsun Aome Analytics Lustomers Membership Aembers	Home > Membership > Promotion Basic Info Basic Info Point Rule Name: Double Loyalty Program: Mitrand	n Points Rules > Details rd Eleven Promotion Loyalty			Point Rul Cost Cen	e Code: 2021112500001 iter: Promotion cost				SuperAdm
Techsun Aome Analytics Customers Membership Aembers ooints	Home + Membership + Promotion Basic Info Point Rule Name: Double Loyalty Program: Mitrand Point Rule Type: Promotio	n Points Rules > Details			Point Rult Cost Cen Point Rult	e Code: 2021112500001 Iter: Promotion cost e Stotus: List				SuperAdm
Fechsun tome unalytics Customers Aembership tembers oints oints asic Points Rules	Home > Membership > Promotion Basic Info Basic Info Paint Rule Name: Double Loyalty Program: Mitrand Point Rule Type: Promotio Applicable Conditions	n Points Rules > Details rd Eleven Promotion Loyalty n Points			Point Rule Cost Cen Point Rule	e Code: 2021112500001 Iter: Promotion cost e Stotus: List				SuperAdmi
Techsun Aome Lanalytics Customers Membership Members Iosic Points Rules romotion Points oyalty Configur.	Home + Membership + Promotion Basic Info Basic Info Point Rule Name: Double Loyalty Program: Marand Point Rule Type: Promotio Applicable Conditions Comparing Time: 2021a Ib	n Points Rules > Details rd Eleven Promotion Loyalty in Points	226040		Point Rule Cost Cen Point Rule	e Code: 2021112600001 Iter: Promotion cost e Stotus: List				SuperAdm
Techsun Aome Analytics Customers Aembership Aembers toints toisic Points Rules vomation Points oyalty Configur Aarketing	Home + Membership + Promotion Basic Info Point Rule Name : Double Loyalty Program : Mitrand Point Rule Type : Promotio Applicable Conditions Campaign Time : 2021-II- Applicable Stores : Usable	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 rfor all stores	2359.59		Point Rule Cost Cen Point Rule Target M Applicob	e Code: 2021112500000 Iter: Promotion cost e Status: List larketing List: Usable fit ke Products: Usable fot	r all groups			SuperAdm
Techsun tome tome tome toutomes toutomes toutomes toutomes toutomes toutos touto tou	Home + Membership + Promotion Basic Info Point Rule Nome : Double Loyalty Program : Mitrand Point Rule Type : Promotio Applicable Conditions Campaign Time : 2021-II- Applicable Stores :: Globble Point Threshold : Amount I	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 for all stores Reached 100 yuan	2359:59		Point Rule Cost Cen Point Rule Target M Applicab Discount	e Code: 2021112600000 iter: Promotion cost e Stotus: List iarketing List: Usable fa lei Products: Usable fa Limit: Unlimited	r all groups r all products			SuperAdm
Techsun tome tome tome tome tome toutomers toutomers tembership tembers toints tasic Points Rules temonotion Points temonotion Points tout tetting tout configur. tetting tett	Home + Membership + Promotion Basic Info Point Rule Name : Double Loyalty Program : Mitrand Point Rule Type : Promotion Applicable Conditions Compaign Time : 2021-II- Applicable Stares : Usable Point Threshold : Amount	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 of or all stores Reached 100 yuan	2359:59		Point Rule Cost Cen Point Rule Target M Applicab Discount	e Code: 202112600001 Iter: Promotion Cost e Status: List larketing List: Usable fa ke Products: Usable fa Limit: Unlimited	r oli groups ali products			SuperAdmi
Techsun tome tome tome tome tome toutomes toutomes toutomes toutomes toutos tou	Home + Membership + Promotion Basic Info Approval Record Basic Info Point Rule Name: Double Loyalty Program: Mitrond Point Rule Type: Promotion Applicable Conditions Composign Time: 2021-II- Applicable Stores: Usable Point Threshold: Amount	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 a for all stores Reached 100 yuan	235959		Point Rule Cost Cen Point Rule Target M Applicab Discount	e Code: 202112500000 Iter: Promotion Cost e Stotus: List Iarketing List: Usable fi kle Products: Usable fi Limit: Unlimited	r all groups r all products			SuperAdmi
Techsun  tome tome customers customers dembership dembership dembers tooints coints co	Home + Membership + Promotion Basic Info Point Rule Nome: Double Loyalty Program: Mitrand Point Rule Type: Promotion Applicable Conditions Compaign Time: 2021-II- Applicable Stores: Usable Point Threshold: Amount I Reward Paipt Group: Interval.	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 of all stores Reached 100 yuan	235959		Point Rul Cost Cen Point Rul Target M Applicab Discount	e Code: 202112600001 ter: Promotion cost e Status: List larketing List: Usable fo kle Products: Usable fo Limit: Unlimited	r all groups r all products			SuperAdmi
Techsun ome ome customes customes dembership dembership dembers coints custore coints custore coints custore coints custore coints custore cus	Home + Membership + Promotion Basic Info Point Rule Nome: Double Loyalty Program: Mitrand Point Rule Type: Promotion Applicable Conditions Compaign Time: 2021-II- Applicable Stores: Usable Point Threshold: Amount I Reward Point Group: Integral value Point Validity Type: Fred	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 of all stores Reached 100 yuan ie Duration	235959		Point Rul Cost Cen Point Rul Target M Applicab Discount Obtainin Point Val	e Code: 2021/12800000 ter: Promotion cost e Stotus: List larketing List: Usable fo ke Products: Usable fo Limit: Unlimited g Way : Gilt 2 Point/A i lidity: 1 Year	r all groups r all products			SuperAdmi
Techsun ome ome customes customes dembership dembership dembers coints c	Home + Membership + Promotion Basic Info Point Rule Nome: Double Loyalty Program: Mitrand Point Rule Type: Promotion Applicable Conditions Compaign Time: 2021-II- Applicable Stores: Usable Point Threshold: Amount I Reward Point Group: Integral value Point Validity Type: Freed Join in Upgrade: Yes	n Points Rules > Details rd Eleven Promotion Loyalty n Points 26 00:00:00 to 2021-12-31 of rail stores Reached 100 yuan ie Duration	235959		Point Rul Cost Cen Point Rul Target M Applicab Discount Obtainin Point Val Superpoi	e Code: 202112600001 tet: Promotion cost e Status: List larketing List: Usable fo kle Products: Usable fo Limit: Unlimited g Way : Gift 2 Point/A ( lidity: 1 Year attion Limit: Yea	r all groups r all products			SuperAdmi
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Step 7: You can view the audit record of this promotional point rule

Techsun					SuperAdmin v
ක Home	Home > Membership > Promotion Points Rules >	Details			
☑ Analytics 条 Customers	Basic Info				
🖄 Membership	Approval Time	Approver	Approval Status	Approval Comments	
Members	2021-11-26 10:15:25	SuperAdmin	Approved		
Points					< 1 >
Basic Points Rules					
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## 8. MARKETING

#### MARKETING CALENDAR

### **Function Description:**

1) You can check the date distribution of the event through the marketing calendar;

# Step 1: Select the menu bar [Marketing]→[Calendar] to enter the marketing calendar view interface



#### WHAT IS A MARKETING ACTIVITY

- 1) Provide the management of a variety of marketing objects, including group definitions of crowds, product groups, Store groups definitions, and other object scope management;
- Provide the management of a variety of marketing rules, including points rules, coupon rules, group marketing rules, individual marketing rules, etc., the configuration of common marketing activities such as marketing automation;
- 3) Provide marketing calendar management for easy viewing and statistics of daily marketing activities;

### MARKETING ACTIVITIES

## **Function Description:**

- 1) The system supports a single marketing campaign: execute a single or multiple marketing strategies for a specified user group or a user who triggers a certain behavior, and each marketing strategy is executed only once.
- 2) The system supports periodic marketing activities: on the basis of a single marketing activity, based on a certain time period as the condition, the marketing strategy is executed repeatedly
- 3) The system provides the function of creating a new marketing activity. The new marketing activity is divided into two steps: basic information of the new activity and the activity process.
- Basic information of new activities, support configuration of activity time, activity channel, activity approver, etc.
- Create a new activity process to support customizing the activity process through the free collocation of users, behaviors, rewards, messages, waiting, and A/B-test nodes.
- 4) When configuring the activity process, the system provides the functions of adding nodes at the same level, adding subordinate nodes, deleting nodes, and replacing nodes
- New sibling nodes: User and behavior nodes support adding sibling nodes. After adding sibling nodes, configure node fields, and the activity process will generate new branches.
- Add lower-level nodes: all nodes support lower-level nodes. After adding lower-level nodes successfully, add nodes
- Deleting a node: only supports deleting a single node, and deleting a node does not affect the flow below the node.
- Replacement node: only supports the replacement of a single node, and the replacement of the node does not affect other nodes.
- 5) The system provides the approval function of marketing activities
- 6) The system provides the timing start function of marketing activities.
- 7) The system provides the end function of marketing activities. When a marketing campaign encounters an emergency situation in progress, it is supported to manually end the campaign.
- 8) The system provides the number of passers at each node of the marketing activity and the conversion rate analysis function of each activity node.
- 9) During marketing activities, the system records trigger behavior, SMS notifications, WeChat notifications, coupon issuance, and points issuance information.

me	Search by campaign r	iame/camp Q	Γ									+ Cre
alytics stomers	Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
mbership Irketing	Test	HD2021120028	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou mey	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	admin	administrator	Сору Арргоче
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	Birthday Compaign	HD2021120016	Waiting to Start	Approved	Single campaign	Everyday	Other	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	Fairuz	Copy Stort

# Step 1: Select the menu bar [Marketing]→[Campaigns] to enter the marketing activities view

### Instruction Manual:

- 3) Support searching for events by event name and event ID
- Supports screening activities by activity status, approval status, activity approver, activity type, activity channel, Loyalty Configuration, activity start time, activity end time, activity creation time, and activity creator.
- 5) Support to quickly create new marketing activities by copying activities
- 6) Support deleting marketing activities

## Step 2: Click the [Create] button to select the type of activity

tics	Search by campaign r	name/camp Q	۲									+
mers	Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
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s gs	more than 4 times	HD2021120025	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou mey	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	administrator	Copy Approv
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Step 3: Fill in the basic information form of the activity Single event form
Techsun			SuperAdmin v
ය Home	Home > Marketing > Campaigns > Create		
Analytics	Campaign Bar	sic Info (2) Co	mpaign Flow
冬 Customers			
図 Membership	* Campaian Name:	Please enter	
🕅 Marketing	Loyalty Program:	Please enter name to search V	
Calendar	Campaign Type:	Please select V	
Campaigns	* Campaign Channel:	Omnichannel × + 5	
Coupons	* Approver:	Please enter name to search	
Messaging	Campaign Time:	Start Time 🐐 End Time 🛗	
G Orders		Desc:	
角 Settings		1.While enabling campaign, current time < start time, Until start time, campaign will run automatically; Once it is end time, campaign will be ended automatically	
		2.When the campaign starts, end time > current time > start time, campaign starts immediately;Once it is end time, campaign will be ended automatically	
		3. When the campaign starts, current time ≥ end time, campaign can't be started.	
		Save Next Step	

## Recurring event form

	Techsun		Super	Admin v
,	බ Home	Home > Marketing > Compaigns > Create		
1	Analytics	🕕 Campaign Bar	asic Info (2) Campaign Flow	
3	& Customers			
3	න Membership	* Compolen Nama:	Plansa entar	
	R Marketing	- compaign name.		
	indiceting	Loyalty Program:	Please enter name to search	
	Calendar	Campaign Type:	E Please select	
ł.	Compaigns	Campaign Channel:	Omnichannel × + 5	
٤	Coupons	* Approver:	Please enter name to search	
ļ	Messaging	* Campaign Time :	Start Time - End Time 🗎	
1	Orders	Campaign Cycle:	Everyday Every week Every month	
1	1 Settings		Desc:	
			LWhile enabling campaign, current time 4 start time, lunit start time, campaign will run automatically, come it is end time, compaign will be ended automatically	
			2.When the campaign starts, end time > current time > start time, campaign starts immediately/cole tils and time, campaign will be ended automatically	
			<ol> <li>When the compolgin starts, current lime 2 end time, compolgin con't be started.</li> </ol>	
			Save Next Step	

Step 4: After entering the basic information of the activity, click Next

Techsun				SuperAdmin v
ය Home	Home > Marketing > Campaigns > Create			
Analytics	🚺 Campaign Bar	sic Info	2 Campaign Flow	
A Customers				
図 Membership				
W Marketing	• Campaign Name:	Please enter		
Calendar	Loyalty Program:			
Compaigne	* Campaign Type:	Please select		
Compoigns	Campaign Channel:	Omnichannel × + 5		
Coupons	* Approver:	Please enter name to search	×	
Messaging	* Campaign Time :	Start Time - End Time	<b>m</b>	
Crders	Campaign Cycle:	Everyday O Every week O Ev	very month	
酌 Settings		Desc:		
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		2.When the campaign starts, end tim current time≥start time, campaign s Immediately;Once it is end time, cam will be ended automatically	ie > starts spaign	
		<ol> <li>When the campaign starts, current end time, campaign can't be started.</li> </ol>	time ≥	

Step 5: After setting up the activity process, click Finish

Techsun				SuperAdmin v
ය Home	Home > Marketing > Campaigns > Create			
Analytics		Campaign Basic Info	2 Campaign Flow	
糸 Customers	Customer			◎ ⊖ 80% ⊕
创 Membership	(A) Customer			
🕅 Marketing	Action (R) Behavior			
Calendar	Reward		(A) Stort	
Campaigns	D Message		↓ ↓	
Coupons	Flow Control		Customer Test-Shopily	
Messaging	Wait		Ð	
G Orders			Message EmaiNotification	
酌 Settings			÷	
			* End	
:=		Previous Step Save	Finish	

- 1) User node: It supports not only the selection of existing user groups, but also the creation of new user groups
- 2) Behavior node:
- Support real-time monitoring of user behavior (5 minutes level);
- Support the choice to monitor the behavior of users in the future;

- Support the user to select the time range that needs to be monitored.
- 3) Reward node: support the selection of coupons and points
- Waiting for the node: support the configuration of waiting until a fixed date and waiting for N days
- 5) A/B-test node: supports up to 10 tests, and the personnel in each test are randomly assigned
- 6) Message node:
- Support the selection of configured message templates;
- Support SMS and WeChat notification channels;
- Support the configuration of a certain message channel priority reach and simultaneous reach of multiple channels.
- 7) The activity process supports A/B test activities and multi-wave activities

# Step 6: After completing the new activity, click Confirm to Submit for Approval

Techsun			SuperAdmin ~
ය Home	Home > Marketing > Campaigns > Create		
Analytics		⑦ Submit for approving         ⑦ Campaign Flow	
条 Customers	Customer	Are you sure to submitTestcampaign for approving, campaign can't be edited once submitted	◎ ⊖ 80% ⊕
ම Membership	Action	Cancel	
🕅 Marketing	(R) Behavior	(A) Start	
Calendar	Reward		
Campaigns	Message     Flow Control	(A) Customer	
	(S) Wait	Tent-Shopely	
Crders	A/B A/B test	(D) Message	
酌 Settings			
		trid	
		Previous Step Sove Finish	

Step 7: After submitting for approval, the approver clicks [Approval]

Techsun							Execution succeed						
습 Home	Search by campaign	name/camp Q	F									+ Create	
条 Customers	Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation	
හි Membership ශ Marketing	Test	HD2021120029	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou rney	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	admin	administrator	Copy Approve	
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Messaging	bella	HD2021120027	Draft	Draft	Single campaign	Everyday	Other	Miniprogram	MBrand Loyalty	admin	administrator	Edit Copy Delete	
ট Orders 현 Settings	test	HD2021120026	Draft	Draft	Single campaign	Everyday	Customer Jou rney	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	max	Johnson	Edit Copy Delete	
	more than 4 times	HD2021120025	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou rnøy	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	administrator	Copy Approve	
	Newcomer lifecycle	HD2021120017	Waiting to Start	Approved	Single campaign	Everyday	Customer Jou rney	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	Alevin	Copy Start	
										Total 8 piece	(s) of data	1 > 30 / page >	

### instruction manual

1) Only the approver selected by the marketing activity can approve the marketing activity

Step 8: After the approval is passed, click [Start]

	- Create
A Customers         Campaign Name         Campaign Campaign Approval Code         Campaign Approval Status         Campaign Type         Campaign Campaign Cycle         Campaign Campaign Campaign Cycle         Campaign Campaign Cycle         Campaign Campaign Cycle         Campaign Campaign Cycle         Campaign Campaign Campaign Cycle         Campaign Campaign Cycle         Campaign Campaign Campaign Campaign         Campaign Campaign Campaign Campaign         Campaign Campaign Campaign Campaign         Campaign Campaign Campaign Campaign         Campaign Campaign	
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Collendor Compaigns Test HD2021120028 Draft HD2021	ve
Image: Solution of the soluti	ve
<u>A</u> settings                Newcomer lifecycle             HD202II20017               Waiting to             Approved Single compaign             Everyday             reey                Custome Jou             reey               Official             Website,Tmail               Float               Alevin               Copy               Stort               mey               Migroag	
Official Website.Tmall Flogship Shop,Youran Birthday.Compaign HD2021/20016 Walting to Approved Single compaign Everyday Other Cloud Order Millionagr Millional Layality. Alevin Fairuz Copy Start arru,D Ragiship Shop, Millionagr Millional Layality. Alevin Fairuz Copy Start	
Official Website Tmall Flogship Shap, Youran Total 6 piece (s) of data < 1 > 3	/ page v

Step 9: If you encounter unexpected situations during the activity, click [End]

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습 Home 교 Analytics	Search by campaign	name/camp Q	F									+ Creat	te
条 Customers	Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation	
密 Membership	Test	HD2021120029	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou rney	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	admin	administrator	Copy Approve	
Calendar Campaigns	Test	HD2021120028	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou rney	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	admin	administrator	Copy Approve	
Messaging Orders	more than 4 times	HD2021120025	Draft	Under Ap proval	Single campaign	Everyday	Customer Jou mey	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	administrator	Copy Approve	
角 Settings	Newcomer lifecycle	HD2021120017	In Progress	Approved	Single campaign	Everyday	Customer Jou rney	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	Alevin	Copy End	
	Birthday Campaign	HD2021120016	Waiting to Start	Approved	Single campaign	Everyday	Other	Official Website,Tmall Flagship Shop,Youzan Cloud Order Miniprogr am,JD Flagship Shop, Miniprogram	MBrand Loyalty	Alevin	Fairuz	Copy Start	
	10.10 0	10000100015	Prove Ca	P0	Alaska anna alas	P. and March	04	Official Website,Tmall Flagship Shop,Youzan	1 Proved Lancelle	Total 6 piece	(s) of data	1 > 30 / page	~

### instruction manual

- 1) After clicking End, the entire marketing activity process ends, and the points and coupons issued during the activity can be used as usual.
- 2) After the marketing activity is over, it cannot be restarted.

### Marketing activity analysis

### Marketing funnel analysis (number of people)





### Funnel analysis of marketing activities (person times)

### **Coupon record**

	SuperAdmin v
Home > Marketing > Campaigns > Details	
Campaign Row Canvas Campaign Basic Info WeChat Record SMS Record Coupon Record Point Record Operation Record	
Coupon Code Coupon Coupon Coupon Coupon Customer Member Coupon Claim Time Consumption Order Code Consun	nption Related Marketing
собе полле туре силеля полле собе азоцов пліте оббет	unount compagn vane
	Home + Moriseting + Composign Bosic Info       Wechat Record       SMS Record       Coupon Record       Operation Record       Coupon Coupon       Coupon

### **Points record**

Techsun	S	SuperAdmin v
ක Home	Home > Marketing > Compaigns > Details	
Analytics	Campaign Flow Canvas Campaign Basic Info WeChat Record SMS Record Coupon Record Point Record Operation Record	
糸 Customers	Point Group Point Account Roint Group Point Record Source Roint Operation Type Point Variation Value of Usable Point Balance of Total Variation Value	Join in Ungra
Membership	Direction Points This Order of Points	
Marketing		
Calendar		
E Coupons		
Messaaina		
Crders		
角 Settings		
=		

## Examples of marketing activities Best Coupon Test-A/Btest



## User refined operation



### 9. COUPONS

#### WHAT IS THE COUPONS

Provide complete coupon configuration rules, support full discount, discount, redemption and other coupon rules configuration, coupon collection, coupon verification, coupon expiration and other related services;

#### CONFIGURE COUPON RULES

### **Function Description:**

- 1) Three types of coupons can be created: full discount coupons, discount coupons, and redemption coupons, support the definition of coupon points rules in the system, and support the definition of the following types of rules:
  - Support configuration of coupon name
  - Support configuration of coupon inventory
  - Support this coupon to be associated with Loyalty Configuration
  - Support this coupon to be associated with cost center
  - Support to configure the cost of this coupon

- Support the configuration of the threshold for the use of coupons, such as spending more than 1,000 yuan to use the coupon
- Support the configuration of discount coupons, such as 500 yuan reduction
- Support the configuration of coupon distribution forms, such as public collection (referring to users actively collecting), event coupons (distributing through events)
- Support configuration instructions, if there are some special rules, you can manually enter
- Support the configuration of the validity period of the usage rules, three options: fixed date period (configuration start effective date, end date), fixed duration (configure the number of days after the user receives the effective and end days), start limited-date end (configure the user to receive a few days Effective and end date after)
- Support the configuration of the available time, which can be specific to the time period of the date
- Support for configuring and using stores, you can configure all stores, or you can configure some stores through Store groupss
- Support the configuration and use of commodities, which can be all commodities, or part of commodities can be configured through Product Groupss
- Support the configuration of refund coupons, support refund coupons, and set the validity period of refund coupons
- Support configuration stacking restrictions, support this discount and other coupons to be used in combination
- Support configuration transfer settings, support this coupon can be transferred

# Step 1: Select the menu bar [Coupons] $\rightarrow$ [Rules] to enter the coupon rules view interface

Techsun											SuperAdmin v
<ul> <li>G Home</li> <li>☑ Analytics</li> <li>※ Customers</li> <li>&gt;</li></ul>	Cash Back Coupon Di Eg Deduct 20 yuan for each 100 Eg det 2 yuan Create Now		Discount Coupon Eg det 2% off for orders over 100 Create How Create How Create Now Create Now								Hide ¥
Marketing	Coupon Name/Rule	Code Q	F		Approval		Courson Validity			Validity Day(e)(Effective after N	
Coupons	Coupon Name	Code	Type Redeem co	Coupon Content Redeem products	Status	Rule Status	Type Fixed Date Rana	Effective Time	Expiry Time	day(s))	Operation
Rules	free coffee 20% discount cou	2021120600002	upon Discount C	without threshold Without threshold g	Approved	List	e Fixed Date Rang			1	Copy Unlist Increase
Transfer Records	pon 2022-couponrulet	2021120100001	Cash Back	et 8 Discount Deduct without thre	Under Appr	Draft	e Fixed Duration	01/12/2021 0:00 A	01/1/2022 11:59 P	'	Copy Approve
Messaging	Black Friday-Rede	2021112500003	Redeem co upon	Redeem products without threshold	Approved	List	Fixed Duration	25/11/2021 0:00 A M	30/11/2021 11:59 P M		Copy Unlist Increase
自 Settings	Black Friday-20% discount coupon	2021112500002	Discount C oupon	Orders over 30 get 8 Discount	Approved	List	Fixed Duration	25/11/2021 0:00 A M	30/11/2021 11:59 P M		Copy Unlist Increase
	Black Friday-150 minus 25 discount coupons	2021112500001	Cash Back Coupon	Orders over 300 ca n save 50 Yuan	Approved	List	Fixed Duration	25/11/2021 0:00 A M	30/11/2021 11:59 P M		Copy Unlist Increase
	Birthday Redeem	2021111900001	Redeem co upon	Orders over 50 Red eem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
	Birthday 150 minu s 25 discount cou pons	2021111800002	Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Rang e			1	Copy Unlist Increase
										Total 12 piece(s) of data	1 > 30 / page >

1) Supports searching by coupon title, rule ID, or you can click the filter icon to perform conditions: coupon type, rule status, approval status to filter;

### Step 2: Click the [Create Now] button

Techsun										SuperAdmin v
습 Home I Analytics 용 Customers	Cash Back Coupon Eg: Deduct 20 yuan for each yuan Create Now	Discount Coupon         Redeem Coupon           exter 12 right for adder over too right								Hide 🤘
I Membership	Coupon Name/Rule Code	Q E		Approval		Coupon Validity			Validity Day(s)(Effective after N	
Coupons Rules	Coupon Name Code	20600002 Redeem co upon	Redeem products without threshold	Status	Rule Status	Type Fixed Date Rang e	Effective Time	Expiry Time	day(s))	Operation Copy Unlist Increase
Records	20% discount cou pon 20211	20600001 Discount C oupon	Without threshold g et 8 Discount	Approved	List	Fixed Date Rang e			1	Copy Unlist Increase
Messaging	2022-couponrulet 20211: est 20211:	20100001 Cash Back Coupon	Deduct without thre shold 10 Yuan Redeem products	Under Appr oval	Draft	Fixed Duration	01/12/2021 0:00 A M 25/11/2021 0:00 A	01/1/2022 11:59 P M 30/11/2021 11:59 P		Copy Approve
Orders  Crders  Settings	em 202111 Black Friday-20% 202111 discount courson	12500003 upon 12500002 Discount C ouroon	without threshold Orders over 30 get	Approved	List	Fixed Duration	M 25/11/2021 0:00 A	M 30/11/2021 11:59 P M		Copy Unlist Increase
	Black Friday-150 minus 25 discount 20211 coupons	12500001 Cash Back Coupon	Orders over 300 ca n save 50 Yuan	Approved	List	Fixed Duration	25/11/2021 0:00 A M	30/11/2021 11:59 P M		Copy Unlist Increase
	Birthday Redeem 202111	11900001 Redeem co upon	Orders over 50 Red eem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
	Birthday 150 minu s 25 discount cou 202111 nons	11800002 Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Rang e			1	Copy Unlist Increase
									Total 12 piece(s) of data <	1 > 30 / page∨

Step 3: After entering specific information on the creation page, click Save as Draft, or click Submit for Review

Techsun		SuperAdmin v
ය Home	Home > Coupons > Rules > Create	
Analytics	Basic Info	<b>\$</b> 100% <b>—</b> )
条 Customers	< Reburn	Coupon ***
🖄 Membership	Coupon Name: Please enter coupon name  Deduct y	yuan off coupon
词 Marketing	Total Inventory: Please ent	or orders of any amount
	Loyally Program: Please select members	
Rules	Cost Center: Please select cost center V	
Records	Cost Expense: Total Cost 0.00 Yuan Used for calculating verification cost	
Transfer Depende	Threshold for use :  No threshold for use	
Transfer Records	Orders over Please ent Usable for xxx yuan	
Messaging	* Coupon Content: Coupon Content Please ent. Yuan	
Orders	Issue Method: Dublic Receiving Tick it then coupons will show in the detail pages for customers to receive by themselves	
<b>胎</b> Settings	Campaign Coupon Tick it then allow to be selected issuing coupon by campaign owners	
	Instructions: Please enter, no more than 300 words	
	lles Bula	
	* Validity:   Fixed Date Range Fixed Duration Effective Date-Expiry Date	
:=	Concel Sove as droft Submit for approving	

## Step 4: Complete the creation of coupon rules

Techsun					SuperAdmin v
습 Home I Analytics & Customers	Cash Back Coupon Ig: Deduct 20 yuan for each 100 Ig: 0 yuan Create Now	Discount Coupon Redee bet 20% off for orders over 100 Egr Redeem pro yuon 10 Create Now Cre	m Coupon auds for orders over aute Now		Hide ♥
합 Membership 词 Marketing	Coupon Name/Rule Code Q 7	De Coupon Content Approval	Rule Status Coupon Validity Effective Time	Expiry Time Validity Day(s)(Effective after N	Operation
Coupons Rules	free coffee 2021120600002 Rec	deem co on without threshold Approved	List Fixed Date Rang e	day(s))	Copy Unlist Increase
Records Transfer Records	20% discount cou 2021/20600001 Dis pon 2022-couponrulet 2021/20100001 Ca est 2021/20100001 Ca	scount C Without threshold g Approved ppon et 8 Discount Approved tsh Back Deduct without thre Under Appr spon shold 10 Yuan oval	List Fixed Date Rang e Draft Fixed Duration M	1 01/1/2022 11:59 P M	Copy Unlist Increase Copy Approve
Messaging	Black Friday-Rede em 2021112500003 Red up	deem co Redeem products Approved	List Fixed Duration 25/11/2021 0:00 A	30/11/2021 11:59 P M	Copy Unlist Increase
<b>胎</b> Settings	Black Friday-50 2021112500002 ou Black Friday-150 minus 25 discount 2021112500001 Ca coupons	Approved Approved as back Orders over 300 ca Approved ash Back Orders over 300 ca Approved avupon n save 50 Yuan	List Fixed Duration M Fixed Duration 25/11/2021 0:00 A M	30/11/2021 11:59 P M	Copy Unlist Increase
	Birthday Redeem 2021111900001 Red up	deem co Orders over 50 Red on eem product Approved	List Fixed Duration 19/11/2021 0:00 A M	31/12/2021 11:59 P M	Copy Unlist Increase
	Birthday ISD minu s 25 discount cou 202111800002 Co nons	ssh Back. Orders over 150 can Approved upon save 25 Yuan Approved	List Fixed Date Rang e	1 Total 12 piece(s) of data <	Copy Unlist Increase

Step 5: Approve & edit the rules & manage the release & removal & delete

Techsun											SuperAdmin v
Home     Analytics     Customers     Monobarchia	Cash Back C Eg: Deduct 20 yuan 1 yuan Create No	oupon for each 100	Discoun Eg: Get 20% off M Yu Creat	t Coupon or orders over 100 an te Now	Redee Eg: Redeem pro IC Cre	m Coupon iducts for orders i 10 yuan iate Now	over				Hide ¥
Marketing	Coupon Name/Rule	Code Q	Ϋ́		Approval		Courson Validity			Validity Day(e)(Effective after N	
🖾 Coupons	Coupon Name	Code	Type Badoom.co	Coupon Content	Status	Rule Status	Type	Effective Time	Expiry Time	day(s))	Operation
Rules	free coffee	2021120600002	upon Discount C	without threshold a	Approved	List	e Fixed Date Rang			1	Copy Unlist Increase
Transfer Records	pon 2022-couponrulet	2021120600001	oupon Cash Back	et 8 Discount	Approved	List	e	01/12/2021 0:00 A	01/1/2022 11:59 P	1	Copy Unlist Increase
Messaging	est Black Friday-Rede	2021120100001	Coupon Redeem co	shold 10 Yuan Redeem products	oval	List	Fixed Duration	M 25/11/2021 0:00 A	M 30/11/2021 11:59 P		Copy Unlist Increase
Orders	em Black Friday-20% discount coupon	2021112500002	Discount C oupon	Orders over 30 get 8 Discount	Approved	List	Fixed Duration	M 25/11/2021 0:00 A M	M 30/11/2021 11:59 P M		Copy Unlist Increase
	Black Friday-150 minus 25 discount coupons	2021112500001	Cash Back Coupon	Orders over 300 ca n save 50 Yuan	Approved	List	Fixed Duration	25/11/2021 0:00 A M	30/11/2021 11:59 P M		Copy Unlist Increase
	Birthday Redeem	2021111900001	Redeem co upon	Orders over 50 Red eem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
	Birthday 150 minu s 25 discount cou pons	2021111800002	Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Rang e			1	Copy Unlist Increase
										Total 12 piece(s) of data <	1 > 30 / page <

Step 6: Click [Coupon Name] to view the details of the coupon rules

Techsun		SuperAdmin ∨
යි Home	Home > Coupons > Rules > Detoils	
Analytics	Basic Info Analytics Coupon List Additional Issue Record Approval Record	
糸 Customers	Convention	
🖄 Membership		
🕅 Marketing	Coupon Name: 20% discount coupon	Coupon Rule Code: 2021/20600001
🖾 Coupons	Total inventory: 1000	Loyalty Program: MBrand Loyalty
Rules	Cost Center: Promotion cost	Cost Expense: Total Cost 0 Yuan Coupon Content: Without threshold get 8 Discount
Records	Issue Method:	Instructions: 20% off for Newcomer
Transfer Records		
Messaging	Use Rule	
Crders	Validity: Claim coupon 7 from 1 usable for xx day(s)	Usable Time Range: 00:00:00-23:59:59
A Settings	Applicable Stores: Usable for all stores	Applicable Products: Usable for all products
	Coupons back for return orders: No	Superposition Limit: No
	Transfer Setting: No	
	Cancel	Copy Unlist Increase

Step 7: You can view the coupon rules [basic information] & Analytics & coupon list & additional issuance records & approval records

Techsun		SuperAdmin v
မ် Home	Home > Coupons > Rules > Detoils	
Analytics	Basic Info Analytics Coupon List Additional Issue Record Approval Record	
条 Customers	Convention	
窗 Marketing	Coupon Name: 20% discount coupon Coupon Rule Code: 2021/20600001	
Coupons	Total inventory: 1000 Loyalty Program: MBrand Loyalty	
Rules	Cost Center: Promotion cost Cost center: Promotion cost Threshold for use : No threshold for use Coupon Content: Without threshold get 8 Discount	
Records	Issue Method: Instructions: 20% off for Newcomer	
Transfer Records	Use Rule	
Orders	Validity: Claim coupon 7 from 1 usable far.xx day(s) Usable Time Range: 00.00.00-2358:59	
<b>胎</b> Settings	Applicable Stores: Usable for all stores Applicable Products: Usable for all products	
	Coupons back for return orders: No Superposition Limit: No Transfer Setting: No	
:=	Concel Copy Unitst Increase	

Step 8: You can view the basic information of the coupon rules & [Analytics] & coupon list & additional issuance records & approval records

Techsun				SuperAdmin v
යි Home	Home > Coupons > Rules > Details			
Analytics	Basic Info Analytics Coupon List Addition	al Issue Record Approval Record		
名 Customers	Accumulated data effect of coupon			
चि Marketing	Total inventory <sup>®</sup>	Remained ⑦	Claimed ③	Consumed ③
Coupons			-	•
Records	Coupon ROI (2)	New Customers ③ O	Old Customers ③ O	Total Order Value ③ ¥0
Transfer Records				
<ul> <li>Messaging</li> <li>Orders</li> </ul>				
<b>胎</b> Settings				
		Cancel Copy	Unlist Increase	

Instruction Manual:

Module	Element	Element	Rule description
--------	---------	---------	------------------

	name	type						
	Total	Numerica	Coupon total inventory					
	inventory	l value						
	Remainin	Numerica	Coupon inventory remaining					
	g amount	l value	coupon inventory remaining					
	Number	Numerica						
	of		Number of coupons received					
	recipients	i value						
	Number	Numerica	Number of people using coupons					
Cumulativ	of users	l value	Number of people using coupons					
	Coupon	Numerica	The actual payment amount/coupon					
e uala	ROI	l value	amount of the order using the coupon					
enect	Number	Numorica	Using this coupon, the number of users					
	of new		who placed an order for the first time					
	customers	I value	who placed an order for the first time					
	Number	Numorica	Using this coupon, the number of users					
	of regular		who placed an order for the second time					
	customers	I value	and above					
	The total	Numorico	The total amount of actual orders					
	amount of		nurshased with coupons					
	orders	i value	purchased with coupons					

Step 9: You can view the basic information of the coupon rules & Analytics & [coupon list] & additional issuance records & approval records

Techsun		SuperAdmin ~
ය Home	Home > Coupons > Rules > Details	
Analytics	Basic Info Analytics Coupon List Additional Issue Record Approval Record	
冬 Customers 図 Membership	Coupon Rule Coupon Coupon Coupon Customer Member Coupon Claim Time Consumption Order Code Consumption R Coupon Code Name Type Content Name Code Status Time Time Order Code Order Amount C	elated Marketing ampaign Name
贸 Marketing		
Coupons		
Rules		
Transfer Records		
Messaging		
Corders		
A1 Settings		
1	Cancel Copy Unlist Increase	

Step 10: You can view the basic information of this coupon rule & Analytics & coupon list & [additional issuance record] & approval record

					SuperAdmin v
Home > Coupons > Rules > Details					
Basic Info Analytics Coupon List	Additional Issue Record Approva	I Record			
Additional Issue Time	Additional Issue Processor	Additional Issue Coupon(Pieces)	Additional Issue Cost Expense(Yuan)	Additional Issue Reason	
	Home + Coupons + Rules + Details           Basic Info         Analytics         Coupon List           Additional Issue Time	Home 1 Coupons 3 Rules 3 Details           Basic Info         Analytics         Coupon List         Additional Issue Record         Approval           Additional Issue Time         Additional Issue Processor         Additional Issue Processor         Additional Issue Processor	Storme 1: Coupons 3: Rules 3: Details           Basic Info         Analytics         Coupon List         Additional Issue Record         Approval Record           Additional Issue Time         Additional Issue Processor         Additional Issue Coupon(Pieces)           Image: Coupon List         I	Back Info       Andytics       Coupon List       Additional Issue Record       Approval Record         Additional Issue Time       Additional Issue Processor       Additional Issue Coupon(Pieces)       Additional Issue Cost Expense(fuur)         Image: Coupon List       Image: Coupon List       Additional Issue Processor       Additional Issue Coupon(Pieces)       Additional Issue Cost Expense(fuur)         Image: Coupon List       Image: Coupon List <td< th=""><th>Besic Info       Analytics       Coupon List       Additional Issue Record         Additional Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record         Image: Control Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record         Image: Control Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record         Image: Control Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record</th></td<>	Besic Info       Analytics       Coupon List       Additional Issue Record         Additional Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record         Image: Control Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record         Image: Control Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record         Image: Control Issue Time       Additional Issue Processor       Additional Issue Coupon(Prices)       Additional Issue Cost Expense(Yuan)       Additional Issue Record

Step 11: You can view the basic information of the coupon rules & Analytics & coupon list & additional issuance records & [approval records]

Techsun						SuperAdmin v
습 Home	Home > Coupons > Rules > Details					
Analytics	Basic Info Analytics Coupon List	Additional Issue Record	oval Record			
ම Membership	Approval Time	Approver		Approval Status	Approval Comments	
🕅 Marketing	2021-12-06 09:29:59	wenwen		Approved		
Coupons					Total I piece(s) of data < 1 >	30 / page >
Rules						
Records						
Transfer Records						
Messaging						
Crders						
A Settings						
			Cancel Copy	Unlist Increase		

### VIEW COUPON RECORDS

### **Function Description:**

1) All coupon records issued by the management system;

# Step 1: Select the menu bar [Coupons] $\rightarrow$ [Records] to enter the coupon view interface

Techsun													SuperAdm
ධ Home	Search by coupon coo	le/coupon.n Q	F										
Customers	Coupon Code	Coupon Rule Code	Coupon Name	Coupon Type	Coupon Content	Customer Name	Member Code	Coupon Status	Claim Time	Consumption Time	Order Code	Consumption Order Amount	Related Marketin Campaign Nam
Membership	1496912050852002	2021120100002						Expiry	02/12/2021 10:3 9 AM			\$0	
Marketing	3494301696020437	2021120100002						Expiry	02/12/2021 10:3 9 AM			\$0	
Coupons	4491661488551249	2021120100002						Expiry	02/12/2021 10:3 9 AM			\$0	
Rules	2748896346356252	2021120100002						Expiry	02/12/2021 10:3 9 AM			\$0	
Transfer Records	8486171655568214	2021120100002				Gregoire C arby	1000000345	Expiry	02/12/2021 10:3 9 AM			\$0	
Messaging	7748352863214718	2021120100002				Rosalind Ab ram	1000000293	Expiry	02/12/2021 10:3 9 AM			\$0	
Orders	8748084914115366	2021120100002				Priscilla Hu ghes	100000267	Expiry	02/12/2021 10:3 9 AM			\$0	
settings	6477721807932730	2021120100002				Astalos Ack lin	1000000305	Expiry	02/12/2021 10:3 9 AM			so	
	2747504412665881	2021120100002				Iversen Ack royd	100000306	Expiry	02/12/2021 10:3 9 AM			\$0	
	1747238940443971	2021120100002				Lorraine Ha II	1000000422	Expiry	02/12/2021 10:3 9 AM			\$0	
	6469701857265193	2021120100002						Expiry	02/12/2021 10:3			\$0	
								Total 281	piece(s) of data	1 2 3	3 4 5	10 > 30/1	oage∀ Go to

1) Support search by coupon number & coupon name, or click the filter icon to perform conditions: membership card number, coupon type to filter;

# **Step 2: Click on the specific coupon to check the coupon details-basic information**

Techsun			SuperAdmin v						
ය Home	Home > Coupons > Records > Detoils								
Analytics	Basic Info Use Situation								
冬 Customers	Basic Info								
Membership									
聞 Marketing	Coupon Name:	Coupon Code: 2748896346356252							
Coupons	Coupon Rule Code: 2021120100002	Coupon Content:							
Rules	Coupon Type:	Validity: 01/12/2021 0:00 AM-02/12/2021 11:59 PM							
Records	Coupon status, expiry								
Trapefer Records									
E Messaging									
Orders									
A Settings									

Techsun			SuperAdmin v								
ය Home	Home > Coupons > Records > Detoils										
Analytics	Basic Info Use Situation										
冬 Customers	Basic Info										
හ Membership											
'ল Marketing	Customer Name :	Member Code :									
Coupons	Sending Time: 02/12/2021 10:39 AM	Coupon Consumption Time:									
Rules	Related Marketing Campaign Name:	Order Code:									
Records											
Transfer Records											
Messaging											
G Orders											
<b>胎</b> Settings											
:=											

### Step 3: Click on the use situation to check the coupon details-usage status

#### COUPON TRANSFER RECORD

### **Function Description:**

You can view the status record of the coupon transfer

### Step1: Click to view the conversion record of the coupon

Techsun											SuperAdmin v
습 Home	Please enter name/ph	none numberQ	Ϋ́								
条 Customers	Coupon Rule Code	Transfer Time	Transferor Name	Transferor Phone Number	Transferor Member Code	Transferee Name	Transferee Phone Number	Transferee Member Code	Coupon Code	Coupon Name	Transfer Status
🖄 Membership	2021112500003	25/11/2021 7:26 PM		****3351	100000002		****3350	100000001	8462053215990890	Black Friday-Rede em	Transfer Succeed
聞 Marketing									Total 1 pie	ece(s) of data < 🚺	> 30 / page∨
Coupons											
Rules											
Transfer Records											
Messaging											
Crders											
酌 Settings											
100											

## Step 2: Click to view the specific transfer details of this coupon

Techsun		SuparAdmin ∨
ය Home	Home > Coupons > Transfer Records > Details	
Analytics	Basic Info	
糸 Customers	Basic Info	
ම Membership		
词 Marketing	Coupon Code: 8462053215990890	Coupon Rule Code: 2021112500003
🖾 Coupons	Coupon Name: Black Friday-Redeem	Coupon Content: 无门槛兑换商品
Rules	Transferor Name : Transferor Member Code : 100000002	Transferor Phone Number: Transfer Time: 25/11/2021 7:26 PM
Records	Transferee Name:	Transferee Phone Number:
Transfer Records	Transferee Member Code: 1000000001	Receiving Time: 25/11/2021 7:29 PM
Messaging	Transfer Status: Transfer Succeed	Stotus Desc: 8月回2021-12-5192:015,杨晨発型波起時間, 优惠券状态:已下发=>時間中 时间2021-12-519:29:18,杨晨発型接受時間, 优惠券 45-5年年1-217119
Crders		
ft Settings		

## 10. MESSAGING

#### WHAT IS THE MESSAGING

Instructions for

Supports docking with external SMS platforms, WeChat platforms, and email platforms. Message notifications can reach users in time for status and content updates, and users can make follow-up judgments based on received messages;

### CONFIGURE SMS TEMPLATES FOR DOMESTIC

### **Function Description:**

- 1) Social Hub supports the configuration of SMS Templates for Domestics;
- According to the SMS platform business model, it supports the configuration of business SMS and marketing SMS. The system will call different interfaces of the SMS platform according to different SMS template types for SMS reach;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [SMS Templates for Domestic] to enter the SMS template view interface

Techsun							Sup	erAdmin
요 Home	Search by template name	Q					-	+ Create
A Customers	Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation	
හ Membership	20% discount coupon	2021120600002	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and si ng! Reply message 'T' to unsubscribe!	Approved	06/12/2021 9:35 PM	Test sending	Сору
퀵 Marketing 그 Coupons	M-No TXN after first TXN-7da ys	2021120300013	Marketing	Hey, life needs to be sweet. Let's slow down and make a cup of cof fee and enjoy the good time. Enjoy life with Mbrand. Reply messag e 'T' to unsubscribe!	Approved	03/12/2021 5:30 PM	Test sending	Сору
Messaging	M-No TXN after first TXN-30d ays	2021120300011	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have s elected fruit packages for you. Placing an order immediately will e am an additional 100 points. Visit the store to explore now and star t your exploration! Reply message '7' to unsubscribe!	Approved	03/12/2021 4:44 PM	Test sending	Сору
SMS Templates f	M-No TXN after first TXN-7da ys	2021120300010	Morketing	Dear Mbrand members, thanks for your love of Mbrand. We have s elected fruit packages for you. Placing an order immediately will e am an additional 100 points. Visit the store to explore now and star t your exploration! Roply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	Test sending	Сору
Email Templates	M-No TXN within 30days after REG	2021120300009	Marketing	Give yourself a cup of coffee time, mellow and lingering, and relea se your fatigue. Mbrand's new mini coffee is waiting for your explor ation. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	Test sending	Сору
SMS Records Email Records Wechat Records	M-No TXN within 7days after REG	2021120300008	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing u sers with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your acc ount. Mbrand welcomes your exploration. Reply message 'T to un subscribe!	Approved	03/12/2021 4:43 PM	Test sending	Сору
Variables	M-Newcomer Reward	2021120300007	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and si ng! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:17 PM	Test sending	Сору
3 Orders	M-No TXN within 7days after	2021120300006	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing u sers with delicious food and leading you to a healthy lifestyle. The	Reject	03/12/2021 4:16 PM	Edit	
I Settings						Total 23 piece(s) of data	1 > 30	/ page v

### Instruction Manual:

1) Support searching by template name;

### Step 2: Click the [Create] button

Techsun							SuperAdmi
Home	Search by template name	Q					+ Crea
Customers	Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
Membership	20% discount coupon	2021120600002	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and si ng! Reply message 'T' to unsubscribe!	Approved	06/12/2021 9:35 PM	Test sending Copy
Marketing	M-No TXN after first TXN-7da ys	2021120300013	Marketing	Hey, life needs to be sweet. Let's slow down and make a cup of cof fee and enjoy the good time. Enjoy life with Mbrand. Reply messag e 'T' to unsubscribe!	Approved	03/12/2021 5:30 PM	Test sending Copy
Messaging	M-No TXN after first TXN-30d ays	2021120300011	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have s elected fruit packages for you. Placing an order immediately will e arn an additional 100 points. Visit the store to explore now and stor t your explorationi Reply message "T to unsubscribe!	Approved	03/12/2021 4:44 PM	Test sending Copy
SMS Templates f	M-No TXN after first TXN-7da ys	2021120300010	Morketing	Dear Mbrand members, thanks for your love of Mbrand. We have s elected fruit packages for you. Reaing an order immediately will e arm an additional 100 points. Visit the store to explore now and star t your explorationi Repty message "T to unsubscribe!	Approved	03/12/2021 4:43 PM	Test sending Copy
Email Templates	M-No TXN within 30days afte r REG	2021120300009	Marketing	Give yourself a cup of coffee time, mellow and lingering, and relea se your fatigue. Mbrand's new mini coffee is waiting for your explor ation. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	Test sending Copy
SMS Records Email Records Wechat Records	M-No TXN within 7days after REG	2021120300008	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing u sens with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your acc ount. Mbrand welcomes your exploration. Reply message 'T to un subscribe!	Approved	03/12/2021 4:43 PM	Test sending Copy
Variables	M-Newcomer Reward	2021120300007	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and si ng! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:17 PM	Test sending Copy
Orders	M-No TXN within 7days after	2021120300006	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing u sers with delicious food and leading you to a healthy lifestyle. The	Reject	03/12/2021 4:16 PM	Edit
Settings						Total 23 piece(s) of data	1 > 30 / page

Step 3: After entering specific information on the creation page, click Save as Draft or Submit for Approving



### Step 4: Complete the creation of the SMS template

Techsun							SuperAdmi
Applica	Search by template name	Q					+ Creo
Customers	Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
Membership	20% discount coupon	2021120600002	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and si ng! Reply message 'T' to unsubscribe!	Approved	06/12/2021 9:35 PM	Test sending Copy
Marketing	M-No TXN after first TXN-7da ys	2021120300013	Marketing	Hey, life needs to be sweet. Let's slow down and make a cup of cof fee and enjoy the good time. Enjoy life with Mbrand. Reply messag e 't' to unsubscribe!	Approved	03/12/2021 5:30 PM	Test sending Copy
Messaging	M-No TXN after first TXN-30d ays	2021120300011	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have s elected fruit packages for you. Placing an order immediately will e arn an additional 100 points. Visit the store to explore now and stor t your explorationic Reply message "T to unsubscribe!	Approved	03/12/2021 4:44 PM	Test sending Copy
SMS Templates f	M-No TXN after first TXN-7da ys	2021120300010	Morketing	Dear Mbrand members, thanks for your love of Mbrand. We have s elected fruit packages for you. Placing an order immediately will e am an additional 100 points. Visit the store to explore now and star t your explorationi Reply message "1 to unsubscribe!	Approved	03/12/2021 4:43 PM	Test sending Copy
Email Templates	M-No TXN within 30days after REG	2021120300009	Marketing	Give yourself a cup of coffee time, mellow and lingering, and relea se your fatigue. Mbrand's new mini coffee is waiting for your explor ation. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	Test sending Copy
SMS Records Email Records Wechat Records	M-No TXN within 7days after REG	2021120300008	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing u sers with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your acc ount. Mbrand welcomes your exploration. Reply message 'T to un subscribe!	Approved	03/12/2021 4:43 PM	Test sending Copy
Variables	M-Newcomer Reward	2021120300007	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and si ng! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:17 PM	Test sending Copy
Orders	M-No TXN within 7days after	2021120300006	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing u sers with delicious food and leading you to a healthy lifestyle. The	Reject	03/12/2021 4:16 PM	Edit
Settings						Total 23 piece(s) of data	1 > 30 / page

1) SMS Templates for Domestics support editing, copying, test sending, and deletion;

#### CONFIGURE SMS TEMPLATES FOR OTHER AREAS

#### **Function Description:**

- 1) Social Hub supports the configuration of SMS Templates for Other Areas;
- According to the SMS platform business model, it supports the configuration of business SMS and marketing SMS. The system will call different interfaces of the SMS platform according to different SMS template types for SMS reach;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [SMS Templates for Other Areas] to enter the SMS template view interface

Techsun						SuperAdmin v
습 Home @ Analytics	Search by template name	Q.				+ Create
条 Customers	Template Name	Code	Business Type	Template Content	Template Status Creation 1	ime Operation
한 Membership '국 Marketing						
Coupons						
SMS Templates f						
SMS Templates f						
WeChat Templat						
SMS Records						
Email Records Wechat Records						
Variables						
Orders  Contens						
1						

2) Support searching by template name;

## Step 2: Click the [Create] button

Techsun							SuperAdmin v
습 Home @ Analytics	Search by template name	Q.					+ Create
冬 Customers	Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
窗 Membership							
Marketing     Coupons							
Messaging							
SMS Templates f							
SMS Templates f							
WeChat Templat_							
Email Templates							
Email Records							
Wechat Records							
Variables							
Orders							
m Settings i≡							
WeChat Templatu Email Templates SMS Records Email Records Wechat Records Variables Corders Status Settings							

# Step 3: After entering specific information on the creation page, click Save as Draft or Submit for Approving

Techsun		SuperAdmin ~
ය Home	Home > Messaging > SMS Templates for Other Areas > Create	
Analytics	Basic Info	
冬 Customers		
🖄 Membership	Signature Name: Please select v	Please enter, no more tha
ল Marketing	Template Name: Please enter	n 500 words
E Coupons	Business Type: Please select	
Messaging	Template Variables: Please select V	
SMS Templates f	Template Content: Please enter, no more than 500 words	
SMS Templates f		
WeChat Templat	0/500	
Email Templates	Ut the length of pure English short message is not more than 80 characters, the charge will be based on one short message. If the length of a short message exceeds 160 characters, it is divided into several	
SMS Records	pieceis according to 153 characters/piece. Eg: If the length of a short message is 230 characters, it is divided into three pieces according to 153 characters /143 characters /14 characters;	
Email Records	Note: The template variable words are not counted; 2.if the length of a message in English and other languages is not more than 70 characters, the charge will	
Wechat Records	be based on one short message. If the length of a message exceeds 70 characters, the message is divided into 67 characters per message. Eg. if the length of a message is 150 characters, the message is divided	
Variables	into three 67 characters, 67 characters, and 16 characters; 3.The content of the SMS template can't contain the symbol of $\ \Omega$ ;	
	4.Illegal messages such as property, immigration, politics, sex and violence are prohibited; 5.It is not allowed to set links to variables (including short links), such as www.[member name].com.	
the orders		
m settings		
	Cancel Save as draft Submit for approving	

**Step 4: Complete the creation of the SMS template** 

Techsun							SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by template name	٩					+ Create
条 Customers	Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
创 Membership	newproduct	2021121400001	Notification	Hi {couponName},new product wiating for you	Draft	14/12/2021 10:13 AM	Edit Copy Delete
₩ Marketing						Total 1 piece(s) of data	1 > 30 / page ~
El Coupons							
Care Messaging							
SMS Templates f							
WeChat Templat_							
Email Templates							
SMS Records							
Email Records							
Wechat Records							
Variables							
Crders							
酌 Settings							
12							

### Instruction Manual:

2) SMS Templates for Other Areas support editing, copying, test sending, and deletion;

#### CONFIGURE WECHAT TEMPLATES

### **Function Description:**

1) Social Hub supports the configuration of WeChat templates, including official account template message templates and applet service message templates;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [WeChat Template] to enter the WeChat template view interface

	Techsun							SuperAdmin v
¢ E	Home     Analytics     Customers	Search by name Corresponding Channel	Q. Template Type	Template Name	Page	Subscribing Message Template	Creation Time	+ Create
1	Membership							
E	Coupons     Messaging     SMS Templates f							
I	SMS Templates f							
	Email Templates SMS Records Email Records							
	Wechat Records Variables							
Ē	∃ Orders È Settings ≣							

Instruction Manual:

1) Support searching by template name;

### Step 2: Click the [Create] button

Techsun							SuperAdmin v
습 Home	Search by name	٩					+ Create
冬 Customers	Corresponding Channel	Template Type	Template Name	Page	Subscribing Message Template Code	Creation Time	Operation
🖄 Membership							
সি Marketing							
E Coupons							
Messaging							
SMS Templates f							
SMS Templates f							
Email Templates							
SMS Records							
Email Records							
Wechat Records							
Variables							
G Orders							
酌 Settings							
=							

Step 3: After entering specific information on the creation page, click Save

Techsun							SuperAdmin v
ය Home	Home > Messaging > WeChat T	emplates > Create					
Analytics	Basic Info						
冬 Customers							
ම Membership	Template Name :	Please enter					
নি Marketing	Corresponding Channel:	Please select V					
E3 Coupons	* Template Type :	Please select V					
🖾 Messaging	Subscribing Message Tem	Please enter					
SMC Tomplator f	Page:	Please enter					
ama remplotes i	Template Variables:	Please select					
SMS Templates f	Template Content:	Please enter, no more than 30	0 words				
WeChat Templat_							
Email Templates	Creation Time:	Creation Time 曲					
SMS Records	Medilection Times						
Email Records	Modification time:	Modification Time					
Wechat Records							
Variables							
G Orders							
酌 Settings							
=				Can	cel Save		

1) The subscription message Code field attribute needs to be filled in, you can enter it at will, for example, test5;

### Step 4: Complete the creation of the WeChat template

1) SMS template supports editing and deletion;

#### CONFIGURE EMAIL TEMPLATES

### **Function Description:**

- 1) Social Hub supports configuring Email Templates;
- According to the business model of the mail platform, it supports the configuration of business mail and Marketingil. The system will call different interfaces of the mail platform according to different EEmail Templates types for mail reach;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [Email Templates] to enter the SMS template view interface

Techsun							SuperAdmin v
<ul> <li>▲ Home</li> <li>✓ Analytics</li> </ul>	Search by template name						+ Create
冬 Customers	Template Name	Email Template Rule Code	Business Type	Email Subject	Template Status	Creation Time	Operation
窗 Membership	Loud Speaker	2021120600001	Notification	Happy Hours 20% Off!	Draft	06/12/2021 6:23 PM	Edit Copy Delete
网 Marketing	M-No TXN after first TXN-60days	2021120300012	Marketing	FREE COFFEE FOR YOU	Approved	03/12/2021 4:50 PM	Test sending Copy
El Coupons	Black Friday promotion	2021112500003	Marketing	Black Friday promotion	Under Approval	25/11/2021 4:33 PM	Сору
SMS Templates f_	birthday party invite	2021111900001	Marketing	Birthday Party with Friends	Approved	19/11/2021 3:56 PM	Test sending Copy
SMS Templates f	Newcomer membership notice	2021111000001	Marketing	Newcomer membership notice	Approved	10/11/2021 4:02 PM	Test sending Copy
WeChat Templat_						Total 5 piece(s) of data	1 → 30 / page∨
Email Templates							
SMS Records							
Wechat Records							
Variables							
G Orders							
췹 Settings							
122							

### Instruction Manual:

1) Support searching by template name;

### Step 2: Click the [Create] button

Techsun							SuperAdmin 🗸
ඬ Home ☑ Analytics	Search by template name Q						+ Create
条 Customers	Template Name	Email Template Rule Code	Business Type	Email Subject	Template Status	Creation Time	Operation
団 Membership	Loud Speaker	2021120600001	Notification	Happy Hours 20% Off!	Draft	06/12/2021 6:23 PM	Edit Copy Delete
聞 Marketing	M-No TXN after first TXN-60days	2021120300012	Marketing	FREE COFFEE FOR YOU	Approved	03/12/2021 4:50 PM	Test sending Copy
Coupons	Black Friday promotion	2021112500003	Marketing	Black Friday promotion	Under Approval	25/11/2021 4:33 PM	Сору
SMS Templates f_	birthday party invite	2021111900001	Marketing	Birthday Party with Friends	Approved	19/11/2021 3:56 PM	Test sending Copy
SMS Templates f	Newcomer membership notice	2021111000001	Marketing	Newcomer membership notice	Approved	10/11/2021 4:02 PM	Test sending Copy
WeChat Templat_						Total 5 piece(s) of data	1 > 30 / page >
Email Templates							
SMS Records							
Email Records							
Wechat Records							
Variables							
G Orders							
A Settings							
1.00							

Step 3: After entering specific information on the creation page, click Save as Draft or Submit for Approving or Preview

	Techsun	Su	perAdmin v
G	Home	Home > Messaging > Email Templates > Create	
R	Analytics	Basic Info	
\$	Customers		
Ŕ	Membership	Templat. Please enter     Email Subject:	
đ	Marketing	* Business Please select V Email Sender:	
В	Coupons	Emol Su     Peose enter	
P	Messaging	・Email Se_ Place select V つでチェ B & U & E 回 Q パ キ	
	SMS Templates f		
	SMS Templates f		
	WeChat Templat		
	Email Templates		
	SMS Records		
	Email Records		
	Wechat Records		
	Variables		
E	Orders		
Ê	Settings		
		Cancel Sove as draft Preview Submit for approving	

**Step 4: Complete the creation of the Email Templates** 

Techsun							SuperAdmin 🗸
ක Home ඏ Analytics	Search by templote name						+ Create
A Customers	Template Name	Email Template Rule Code	Business Type	Email Subject	Template Status	Creation Time	Operation
団 Membership	Loud Speaker	2021120600001	Notification	Happy Hours 20% Off!	Draft	06/12/2021 6:23 PM	Edit Copy Delete
₩ Marketing	M-No TXN after first TXN-60days	2021120300012	Marketing	FREE COFFEE FOR YOU	Approved	03/12/2021 4:50 PM	Test sending Copy
☑ Coupons ☑ Messaging	Black Friday promotion	2021112500003	Marketing	Black Friday promotion	Under Approval	25/11/2021 4:33 PM	Сору
SMS Templates f	birthday party invite	2021111900001	Marketing	Birthday Party with Friends	Approved	19/11/2021 3:56 PM	Test sending Copy
SMS Templates f	Newcomer membership notice	2021111000001	Marketing	Newcomer membership notice	Approved	10/11/2021 4:02 PM	Test sending Copy
WeChat Templat_						Total 5 piece(s) of data	1 → 30 / page ~
Email Templates							
SMS Records							
Email Records							
Wechat Records							
Variables							
Crders							
酌 Settings							
12							

3) Email Templates support editing, copying, test sending, and deletion;

#### CHECK SMS RECORDS

#### **Function Description:**

1) Manage all SMS messages triggered by the system;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [SMS Records] to enter the SMS message view interface

Techsun		Alevin v
습 Home	Search by phone number Q	
条 Customers	Template Name SMS Template SMS Type Business Type Template Contant Name Phone Number Code Sending Time Status Stat	tus Desc
ণ্টে Membership মি Marketing	Bitthday Party Prom otion         202111800002         Domestic SMS         Marketin Marketin T to unsubscribet         Deor Carl Smith, Your bitthday is coming soon, we wish you a hppy bitthday in downce. We e and unickt more privileges! Reply message         29433ABE58042720 E0EA8IDE50A74C2         10/11/2021 4:08 P         Submissio         sign n failed         sign	nature fori nature is n
<ul> <li>Coupons</li> <li>Messaging</li> <li>SMS Templates f</li> </ul>	Birthday Party Prom 2021111800002 Domestic SMS Marketing have prepared generous rewards for you com guess, we wish you a hoppy birthday in advance. We consing soon, we wish you a hoppy birthday in advance. We construct the source of the sou	nature fori nature is n
SMS Templates f WeChat Templat	Birthday Party Prom 2021111800002 Domestic SMS Marketin have prepared generature rewards for you com privileges! Reply message through the state of	nature fori nature is n
Email Templates SMS Records	Bitthday Porty Prom 2021111800002 Domestic SMS Marketing e how preported generous revards for you. Co otion e not unlock more privileges! Ropty messog e T to sunductified	nature fori nature is n
Wechat Records Variables	Bitthday Porty Prom otion         202111800002         Domestic SMS         Marketing Marketing         Dear Nickonov Acton, Your bitthday is coming s oon, we with you a hoppy bitthday in advance.         Nickonov Stable         2843348258042720 39065800/CE242(2)         1000000314         19/11/2021         4.08         P         Submissio         sign age           Come ond unlock more privilegeal Reply mess age         Come ond unlock more privilegeal Reply mess         con         2         1000000314         19/11/2021         4.08         P         submissio         sign	nature fori nature is n
Crders	Deer Easter Toylor, Your birthday is coming soo r, we wish you a hoppy birthday in advance. W Easter Toyl 29433ABE58042720 19/11/2021 4:08 P Submissio sign	nature for
酌 Settings	Total 415 piece(s) of data < 1 2 3 4 5 ···· 14 > 30 / page∨ Go t	0

- 1) Support to query SMS by mobile phone number
- 2) record;

# Step 2: You can click the specific SMS record to query the details of the SMS sending

	Techsun										Alevin $\sim$
1	요 Home	Search by phone number	٩								
1	A Customers	Template Name SMS Templ Rule Code	ate SMS Type	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc
t N	쉽 Membership R Marketing	Birthday Party Prom otion 20211118000	02 Domestic SMS	Marketing	Dear Carl Smith, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message T' to unsubscribe!	Carl Smith	29433ABE5B042720 E0EA881DE5DA74C2	1000000448	19/11/2021 4:08 P M	Submissio n failed	signature fon signature is n
8	Coupons Messaging SMS Templates f.	Birthday Party Prom 20211118000 otion	02 Domestic SMS	Marketing	Dear Merry Doe, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message T' to unsubscribe!	Merry Doe	29433ABE5B042720 D097DE4A3BF06DD 8	1000000397	19/11/2021 4:08 P M	Submissio n failed	signature fon signature is n
	SMS Templates f WeChat Templat	Birthday Party Prom 20211118000 otion	02 Domestic SMS	Marketing	Dear Peck Dods, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message T' to unsubscribe!	Peck Dods	29433ABE5B042720 66FFB8CA6E939ID1	1000000394	19/11/2021 4:08 P M	Submissio n failed	signature fon signature is n
I	Email Templates	Birthday Party Prom 20211118000 otion	02 Domestic SMS	Marketing	Dear Southon Ade, Your birthday is coming soo n, we wish you a happy birthday in advance. W e have prepared generous rewards for you. Co me and unlock more privileges! Reply messag e 'T' to unsubscribe!	Southon A de	29433ABE5B042720 725CD367FCBBBFA5	100000326	19/11/2021 4:08 P M	Submissio n failed	signature fon signature is n
	Wechat Records	Birthday Party Prom 2021118000 otion	02 Domestic SMS	Marketing	Dear Nickonov Acton, Your birthday is coming s oon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply mess age 'T' to unsubscribe!	Nickonov A cton	29433ABE5B042720 39D65808CB242ED 2	1000000314	19/11/2021 4:08 P M	Submissio n failed	signature fon signature is n
E	Orders     Settings	Birthday Party Prom	00 0	1.1 m - 1. + 1 <sup>1</sup> m - 1	Dear Easter Taylor, Your birthday is coming soo n, we wish you a happy birthday in advance. W	Easter Tayl	29433ABE5B042720	1000000400	19/11/2021 4:08 P	Submissio	signature for
	ш эелиндэ				Total	415 piece(s) of	data < 1 2	3 4 5	14 >	30 / page∨	Go to

	Techsun		Alevin $\vee$
	ය Home	Home > Messaging > SMS Templates for Domestic > Details	
I	Analytics	Basic Info Analytics Message Record	
	条 Customers	Basic Info	
	Membership		
	Marketing	Template Name: Birthday Party Promotion SMS Template Rule Code: 202111800002	
8	Coupons	Signature Name: Techsun Business Type: Marketing	
	Messaging	Template Content: Dear {customerName}, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply message 'T' to unsubscribe!	
	SMS Templates f		
	SMS Templates f		
	WeChat Templat		
	Email Templates		
	SMS Records		
	Email Records		
	Wechat Records		
	Variables		
1	Orders		
I	fin Settings		
	=	Cancel Copy Test sending	

# Step 2: You can check the Analytics sent by the message through the message record

Techsun				Alevin v
ය Home	Home > Messaging > SMS Templates for Domestic > Details			
Analytics	Basic Info Analytics Message Record			
ම Membership	Accumulated Data Effect			
সি Marketing	Requests ③	Successes ⑦	Success Rate 🗇	Failures ③
Coupons	0	0	0%	0
🖾 Messaging	Detailed Info			
SMS Templates f			Today v 2021-12-14	2021-12-14 📋 Search Restore Default
SMS Templates f				
WeChat Templat_				
Email Templates				
SMS Records		A =	×	
Email Records		No Data	Available	
Wechat Records				
Variables				
Orders				
酌 Settings				
:=		Cancel Cop	y Test sending	

## Step3: You can check the message records sent by SMS through SMS records

Techsun											Alevin v
ක Home	Home + Messaging + SMS	Templates for Don	nestic > Details	5							
Analytics	Basic Info Analytics	s Message Re	ecord								
条 Customers		-									
窗 Membership	Template Name	SMS Template Rule Code	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc	Marketir Campai
মি Marketing হয় Coupons	Birthday Party Prom otion	2021111800002	Marketing	Dear Carl Smith, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message 'T to unsubscribe!	Carl Smith	29433ABE5B042720 E0EA8B1DE5DA74C2	1000000448	19/11/2021 4:08 P M	Submitted successfull Y	signature format is incorr ect or signature is not ap proved	Birthday
Messaging SMS Templates 1_	Birthday Party Prom otion	2021111800002	Marketing	Dear Merry Doe, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message of the unwardenel	Merry Doe	29433ABE5B042720 D097DE4A3BF06DD 8	1000000397	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
SMS Templates f WeChat Templat Email Templates	Birthday Party Prom otion	2021111800002	Marketing	Dear Pack Dods, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message 'T to unsubscribe!	Peck Dods	29433ABE5B042720 66FFBBCA6E9391D1	100000394	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
SMS Records Email Records	Birthday Party Prom otion	2021111800002	Morketing	Dear Southon Ade, Your birthday is coming soo n, we wish you a happy birthday in advance. W e have prepared generous rewards for you. Co me and unlock more privileges! Reply messag e 'T' to unsubscribe!	Southon A de	29433ABE5B042720 725CD367FCBBBFA5	100000326	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
Variables	Birthday Party Prom otion	2021111800002	Marketing	Dear Nickonov Acton, Your birthday is coming s oon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply mess one 'T to unsubscribe!	Nickonov A cton	29433ABE5B042720 39D65808CB242ED 2	1000000314	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
酌 Settings						Total 163 piec	ce(s) of data	1 2 3	4 5 6	> 30 / page > Go t	•
				Cancel	Сору	Test sending					

#### CHECK MAIL RECORDS

### **Function Description:**

1) Manage all email messages triggered by the system;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [Email Records] to enter the mail message view interface

Techsun											Alevin ~
습 Home 교 Analytics	Search by email	٩									
冬 Customers	Template Name	SMS Template Rule Code	Business Type	Email Subject	Customer Name	Email	Member Code	Sending Time	Sending Status	Status Desc	Marketing Campaign Name
ම Membership											
সি Marketing											
Messaging											
SMS Templates f											
SMS Templates f											
WeChat Templat_											
Email Templates											
Email Records											
Wechat Records											
Variables											
Crders											
fin Settings											

3) Support querying mail records by mobile phone number;

# Step 2: You can click on the specific email record to query the details of the mail sent

	Techsun		Alevin $\checkmark$							
1	습 Home	Home > Messaging > SMS Templates for Domestic > Details								
1	Analytics	Basic Info Analytics Message Record								
,	A Customers	Basic Info								
1	Membership									
	网 Marketing	Template Name: Birthday Party Promotion SMS Template Rule Code: 202111800002								
٤	E Coupons	Signature Name: Techsun Business Type: Marketing								
t	Messaging	Template Content: Dear {customerName}. Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply message 'T' to unsubscribe!								
	SMS Templates f									
	SMS Templates f									
	WeChat Templat									
	Email Templates									
	SMS Records									
	Email Records									
	Wechat Records									
	Variables									
t	Orders									
i	ភ្នំ Settings									
		Concel Copy Test sending								

# Step 3: You can query the Analytics of the email sent through the email record

Techsun					Alevin ~					
ය Home	Home > Messaging > SMS Templates for Domestic > Details									
Analytics	Basic Info Analytics Message Record									
冬 Customers										
Membership	Accumulated Data Effect									
সি Marketing	Requests ③	Successes ⑦	Success Rate ⑦	Failures 🕥						
Coupons	0	0	0%	0						
Messaging	Detailed Info									
SMS Templates f			Taday	2021-12-14 ~ 2021-12-14 曲 Segret	Restore Default					
SMS Templates f										
WeChat Templat										
Email Templates										
SMS Records			/== \							
Email Records			No Data Available							
Wechat Records										
Variables										
Crders										
韵 Settings										
:=			Cancel Copy Test sending							

# Step 4: You can query the message record sent by the mail through the mail record

Techsun											Alevin 🗸
ක Home	Home + Messaging + SMS Te	mplates for Don	nestic > Details	5							
Analytics	Basic Info Analytics	Message Re	cord								
A Customers			-								
创 Membership	Template Name	SMS Template Rule Code	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc	Marketir Campai
₩ Marketing	Birthday Party Prom otion	2021111800002	Marketing	Dear Carl Smith, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message T' to unsubscribe!	Carl Smith	29433ABE5B042720 E0EA8B1DE5DA74C2	1000000448	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
Messaging SMS Templates I	Birthday Party Prom otion	2021111800002	Marketing	Dear Merry Doe, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message T' to unsubscribe!	Merry Doe	29433ABE5B042720 D097DE4A3BF06DD 8	100000397	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
WeChat Templat	Birthday Party Prom otion	2021111800002	Marketing	Dear Peck Dods, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Com e and unlock more privileges! Reply message $T$ to unsubscribe!	Peck Dods	29433ABE5B042720 66FFBBCA6E939ID1	100000394	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
SMS Records	Birthday Party Prom otion	2021111800002	Marketing	Dear Southon Ade, Yaur birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply messag e 1° to unsubscribe!	Southon A de	29433ABE5B042720 725CD367FCBBBFA5	100000326	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthday
Variables	Birthday Party Prom otion	2021111800002	Marketing	Dear Nickonov Acton, Your birthday is coming s oon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply mess age 'T' to unsubscribe!	Nickonov A cton	29433ABE5B042720 39D65808CB242ED 2	1000000314	19/11/2021 4:08 P M	Submitted successfull y	signature format is incorr ect or signature is not ap proved	Birthdoy
酌 Settings						Total 163 piec	e(s) of data 🦂	1 2 3	4 5 6	> 30 / page > Got	io 📄
=				Cancel	Сору	Test sending					

CHECK WECHAT RECORDS

### **Function Description:**

1) Manage all WeChat messages triggered by the system;

# Step 1: Select the menu bar [Messaging] $\rightarrow$ [Wechat Records] to enter the WeChat message view interface

Tech	hsun										Alevin ~
습 Home I Analyti	Home	Search by subject name Q									
冬 Custon	mers	Subject	openID	Member Code	Sending Time	Sending Status	Customer Name Template Nam	ne Status Desc	Subscribing Message Template Code	Distribution Channel	Messag
囵 Membe	ership										
দি Market	ting										
E3 Coupo	ons										
🗹 Messa	iging										
SMS Ter	emplates f_										
SMS Ter	emplates f										
WeCha	at Templat_										
Email T	Templates										
SMS Re	ecords										
Email R	ecords										
Variabi	les										
G Orders	5										
的 Setting	gs										
:=											

#### Instruction Manual:

1) Support querying WeChat records by subject name;

# Step 2: You can click on the specific WeChat record to query WeChat sending details

Techsun		SuperAdmin v							
窗 Membership	Home > Messaging > Wechat Records > Details								
🛱 Marketing	Basic Info								
Coupons	Basic Info								
Messaging									
SMS Templates f	Subject: *******	Subscribing Message Template Code: 22							
SMS Templates f	Customer Name: Atai-1	Member Code: 1000001626							
	Sending Status: Failed to send	Status Desc: *******							
WeChat Templates	Template Name : *******	Sending Time: 2021-12-08 19:51:06							
Email Templates	Individual Marketing Campaign:	openID :							
SMS Records	Page:	Group Marketing Campaign :							
Email Records	Distribution Channel: WeChat Official Account	Message Type: Template Message of WeChat Official Account							
Wechat Records	Related Marketing Campaign Name: Membership SMS notification	Sending Content: Dear customername, you are now presented with a couponname, and you are welcome to use it in the store.							
Variables	Creation Time: 08/12/2021 7:51 PM	Modification Time: 08/12/2021 7:51 PM							

#### 11. ORDERS

#### WHAT IS THE ORDERS

Processing external channels including stores, official websites, APP, WeChat, Alipay, Tmall, JD, Meituan, Dianping, Ele.me, LINE and other channels, as well as distributor channels, brand co-branded members, etc., through the system application API layer, Complete transmission of member orders data into the system, including managing orders, stores, commodities, and Payment Methodss;

#### ORDERS
## **Function Description:**

1) Manage all orders information of the system;

# Step 1: Select the Primary menu bar [Orders] $\rightarrow$ the Secondary menu bar [orders] to enter the order view interface

Techsun												Alevin v
D Home	Search by order ID	Q									+ (	Create
Analytics	Order Code	Customer Name	Member Code	Order Type	Order Direction	Source Channel	Order Date	Store	Store Code	Receivable Amount(Facevalue)	Total Discount Amount(Discount)	Reci Net
Membership	order2030000804	Witney Cardwell	100000352	Take-out	Standard Order	NEWPOS	19/11/2021 9:52 A M	SG West Store	SG West	\$19.00	\$0.00	\$19.
Marketing	order2030000803	Chapdelaine Ca rdon	100000351	Take-out	Standard Order	NEWPOS	19/11/2021 9:52 A M	SG West Store	SG West	\$19.00	\$0.00	\$19.
3 Coupons	order2030000802	Presley Cardinal	100000350	Take-out	Standard Order	Shopify	19/11/2021 9:52 A M	SG West Store	SG West	\$32.00	\$0.00	\$32
Orders	order2030000801	Pandya Ditswort h	1000000373	Take-out	Standard Order	NEWPOS	19/11/2021 9:52 A M	SG West Store	SG West	\$57.00	\$0.00	\$57
Orders	order2030000800	Bannan Ditch	1000000372	Take-out	Standard Order	Shopify	19/11/2021 9:52 A M	SG West Store	SG West	\$32.00	\$0.00	\$33
Store Groups	order2030000799	Maijala Diss	1000000371	Take-out	Standard Order	JD Flagship Shop	19/11/2021 9:52 A M	SG West Store	SG West	\$72.00	\$0.00	\$7
Stores	order2030000798	Nettles Dison	100000370	Take-out	Standard Order	Shopify	19/11/2021 9:51 AM	SG West Store	SG West	\$16.00	\$0.00	\$16
Product Groups	order2030000797	Prewitt Disney	100000369	Take-out	Standard Order	JD Flagship Shop	19/11/2021 9:51 AM	SG West Store	SG West	\$18.00	\$0.00	\$18
Products	order2030000796	Loi Covell	1000000368	Take-out	Standard Order	Shopify	19/11/2021 9:51 AM	SG West Store	SG West	\$16.00	\$0.00	\$16
Payment Methods	order2030000795	Prokes Covel	100000367	Take-out	Standard Order	Shopify	19/11/2021 9:51 AM	SG West Store	SG West	\$36.00	\$0.00	\$3
Settings	order2030000794	Gareis Cove	1000000366	Take-out	Standard	JD Flagship Shop	19/11/2021 9:51 AM	SG West Store	SG West	\$48.00	\$0.00	\$4
							Total 428 piec	e(s) of data < 🚺	2 3 4	5 15 >	30 / page∀ Go to	¢[[]

## Instruction Manual:

1) Support search query by order ID;

Step 2: Click on the specific order to view the order details, including order payment, discounts and other information.

Techsun			Alevin $\vee$
ය Home	Home > Orders > Orders > Details		
Analytics	Basic Info Order Details Point Record		
冬 Customers	Convention		
Membership			
聞 Marketing	Order Code: order2030000804	Order Direction: Standard Order	
Coupons	Customer Name: Witney Cardwell	Member Code: 1000000352	
Messaging	Employee Account:	Source Channel: NEWPOS	
	Order Code of Source Channel: order2030000804	Order Type: Take-out	
Crders	Order Date: 19/11/2021 9:52 AM	Pay Time:	
Orders	Store Code: SG West	Store: SG West Store	
Store Groups	Salesperson Code:	Product Quantity: 1	
Stores	Number of Customers:	Original Order Code:	
Desident Comme	kemark:	order status:	
Product Groups	Amount		
Products	Sales Amount in Original Price: \$19.00	Receivable Amount(Facevalue): \$19.00	
Payment Methods	Coupon Amount: \$0.00	Discount Amount: \$0.00	
A Settings	Total Discount Amount(Discount): \$0.00	Received Amount(Operation Net Value): \$19.00	
	Actual Receipt Tax Cuts: \$0		
:=	Receipt Info		

## Step 3: You can query the related order details through the order

Techsun									Alevin ~
ක Home	Home > Orders > Orders > Details								
図 Analytics 冬 Customers	Basic Info	Point Record	1						
窗 Membership	Order Code	Product Code	Product Title	Quantity	Receivable Amount(Facevalue)	Total Discount Amount(Discount)	Received Amount(Operation Net Value)	Calculate point amount	Creation Time
词 Marketing	order2030000804	PR1000099	Reduced Suga r	1	\$19.00	\$0.00	\$19.00	\$19.00	19/11/2021 10:01 AM
El Coupons								Total 1 piece(s) of data	< 1 > 30 / page >
Messaging									
Orders									
Store Groups									
Stores									
Product Groups									
Product Categor									
Products									
Payment Methods									
m oorings									
=									

# Step 4: You can query the points information generated by the order through the order

Techsun										Alevin ~
ක Home	Home > Orders > Orders	> Details								
Analytics	Basic Info Order	Details Point Record	1							
条 Customers		L				B-1-1				
窗 Membership	Point Group	Point Account	Point Group	Point Record Source	Point Operation Type	Point Direction	Variation Value of Points	Usable Point Balance of This Order	Total Variation Value of Points	Join in Upgrad
聞 Marketing	交易积分	Integral value	Integral value	POS	Order Points	Add	19.00	19.00	19.00	Yes
E3 Coupons								Total 1 piece(s)	of data < 1 >	30 / page ~
Messaging										
Orders										
Orders										
Store Groups										
Stores										
Product Groups										
Product Categor										
Products										
Payment Methods										
A Settings										
=										

#### STORE GROUPS

## **Function Description:**

- 1) The system provides the function of Store groupss, and operators can group the stores that need to participate in an event through the Store groups function for use in the event rules;
- 2) The Store groups currently provides an addition mode: static & dynamic ;
- Static: The Store groups is based on the store currently added and entered, and will not be changed after synchronization to COSMOSDB is enabled;
- Dynamic: This function is temporarily unavailable and will be added iteratively in the future;
- 3) Static Store groups supports all add & not all add options;
- Add all: automatically add all the stores in the system to this group;
- Not all add: you need to manually select the participating stores to add;
- The Store groups needs to be activated. After activation, the store records in the Store groups will be synchronized to COSMOSDB, and only the activated Store groups can be referenced normally;
- 5) The Store groups deactivation function has no effect temporarily;

# Step 1: Select the menu bar [Orders] $\rightarrow$ [Store groups] to enter the Store groups view interface

Techsun							Alevin ~
습 Home	Name	٩					+ Creote
条 Customers	Name	Condition Type	All stores	Desc	Enabled Status	Creation Time	Operation
创 Membership	Online Stores	Static	No	All Online Stores	Enabled	20/10/2021 11:07 AM	Edit Delete
聞 Marketing	Offline Stores	Static	No	all Offline Stores	Enabled	20/10/2021 11:06 AM	Edit Delete
Coupons						Total 2 piece(s)	of data < 🚹 > 30 / page 🗸
C Orders							
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor_							
Products							
Payment Methods							
B Settings							

Instruction Manual:

1) Support searching by name;

## Step 2: Click the [Create] button

Techsun							Alevin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Nome	٩					+ Create
糸 Customers	Name	Condition Type	All stores	Desc	Enabled Status	Creation Time	Operation
匈 Membership	Online Stores	Static	No	All Online Stores	Enabled	20/10/2021 11:07 AM	Edit Delete
阁 Marketing	Offline Stores	Static	No	all Offline Stores	Enabled	20/10/2021 11:06 AM	Edit Delete
E3 Coupons						Total 2 piece(s) o	f data < 1 > 30 / page∨
Messaging     Orders							
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor							
Products							
Payment Methods							
名 Settings							
12							

Techsun			Alevin ~
မ် Home	Home > Orders > Store Groups > Creat		
Analytics	Basic Info		
冬 Customers			
ම Membership	* Name: Pleas	enter	
সি Marketing	All stores: 💿 No	) Yes	
E Coupons	Store Filter Condition:		
Messaging			
G Orders			
Orders	Condition Type: Static	v	
Store Groups	Enabled Status: Disat	d v	
Stores	* Desc: Pleas	enter, no more than 300 words	
Product Groups			
Product Categor	Creation Time: Crea	n Time 🛗	
Products	Modification Time: Modi	ation Time	
Payment Methods			
🖺 Settings			
:=		Cancel	

## Step 3: After entering specific information on the creation page, click Save

Step 4: After saving, click Edit to add the store

Techsun							Alevin ~
요 Home	Nome	Q					+ Create
A Customers	Name	Condition Type	All stores	Desc	Enabled Status	Creation Time	Operation
创 Membership	promotion store	Static	No	12.12 promotion store	Disabled	14/12/2021 10:26 AM	Edit Enable Delete
聞 Marketing	Online Stores	Static	No	All Online Stores	Enabled	20/10/2021 11:07 AM	Edit Delete
<ul> <li>Coupons</li> <li>Messaging</li> </ul>	Offline Stores	Static	No	all Offline Stores	Enabled	20/10/2021 11:06 AM	Edit Delete
C Orders						Total 3 piece(s	i) of data < 1 > 30 / page <
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor							
Products							
Payment Methods							
台 Settings							
12							

Techsun			Alevin V
ය Home	Home > Orders > Store Groups =	> Edit	
Analytics	Basic Info		
冬 Customers			
🖄 Membership	* Name:	promotion store	
Marketing	All stores:		
E Coupons	Store Filter Condition:	Built import Search by store code, sto Built Remove Associated Store Records	
Messaging		Store Code Store Name Store Status Store Code Store Name	
Crders		SG100008 SG100008West St. Normal	
Orders		SG100007 SG100007West St_ Normal Normal	
Store Groups		SG West SG West Store Normal	
Stores		SG East SG East Stora Normal	
Product Groups			
Product Categor		SG Central SG Central Store Normal	
Products		Total 7 piece(s) of data < (1) > 30 / page V	
Payment Methods	Condition Type:	stoic V	
A Settings	Enabled Status:	Disabled V	
	* Desc:	rsts brownongeries	
		Concel Save	

- 1) When all stores select "No", you need to manually add stores;
- 2) You can query the store you need to add through the store Code to add;
- 3) Before enabling, you can remove the stores added to the group;
- 4) Support batch addition and batch removal;

## Step 5: After adding the store, enable the Store groups to complete the Store groups configuration

Techsun							Alevin ~
요 Home 교 Analytics	Nome	٩					+ Create
条 Customers	Name	Condition Type	All stores	Desc	Enabled Status	Creation Time	Operation
엡 Membership	promotion store	Static	No	12.12 promotion store	Disabled	14/12/202110:26 AM	Edit Enable Delete
阁 Marketing	Online Stores	Static	No	All Online Stores	Enabled	20/10/2021 11:07 AM	Edit Delete
El Coupons	Offline Stores	Static	No	all Offline Stores	Enabled	20/10/2021 11:06 AM	Edit Delete
Orders						Total 3 piece(s)	of data < 1 > 30 / page >
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor_							
Payment Methods							
fb Settings							
1.00							

## STORES

## **Function Description:**

1) The system provides a standard interface to connect to external system store records;

# Step 1: Select the menu bar [Orders] $\rightarrow$ [Stores] to enter the store record view interface

Techsun										Alevin ~
ශ Home	Search by store code	, store name Q								
条 Customers	Store Code	Store Name	Source	Store Type	Parent Unit	Country/Region	Province/State	City	Store Status	Creation Time
図 Membership	SG100008	SG100008West Store	POS	HQ			Singapore	Singapore	Normal	18/11/2021 3:09 PM
₩ Marketing	SG100007	SG100007West Store	POS	HQ			Singapore	Singapore	Normal	18/11/2021 3:09 PM
El Coupons	SG West	SG West Store	POS	HQ			Singapore	Singapore	Normal	19/10/2021 6:11 PM
Messaging     Orders	SG East	SG East Store	POS	HQ			Singapore	Singapore	Normal	19/10/2021 6:11 PM
Orders	SG Central	SG Central Store	POS	HQ			Singapore	Singapore	Normal	19/10/2021 6:05 PM
Store Groups	EBUY	EBUYEBUY	WeChat Mall	Offline			Singapore	Singapore	Normal	24/9/2021 11:59 AM
Stores	sdwebsite	sdwebsite	Express Official Website	Official Websit			Singapore	Singapore	Normal	24/9/2021 11:55 AM
Product Groups							Тс	tal 7 piece(s) of da	ita < 🔳	> 30 / page ~
Products										
Payment Methods										
<b>船</b> Settings										
122										

- 1) Support search by store Code and store name;
- 2) When initializing user role permissions, you need to control the user role permissions. For the [Store Records] table, users only need to retain the query permissions;

### PRODUCT GROUPS

### **Function Description:**

- 1) The system provides the function of Product Groups. Operators can use the Product Groups function to group commodities that need to participate in a certain activity for use in the activity rules;
- 2) Product Groups currently provides an addition mode: static & dynamic;
- Static: The product group is based on the currently added product, after enabling synchronization to COSMOSDB, it will not be changed;
- Dynamic: This function is temporarily unavailable and will be added iteratively in the future;
- 3) The static product group supports all add & not all add options;
- Add all: automatically add all the products of the system into the group;
- Not all add: you need to manually select the products participating in the activity to add;

- 4) Product Groupss need to be activated. After activation, the commodity records in the Product Groupss will be synchronized to COSMOSDB, and only the activated Product Groupss can be referenced normally;
- 5) The product group deactivation function has no effect temporarily;

# Step 1: Select the menu bar [Orders] $\rightarrow$ [Product Groups] to enter the Product Groups view interface

Techsun							Alevin ~
습 Home @ Analytics	Search by name	٩					+ Create
条 Customers	Name	Condition Type	All Products	Desc	Enabled Status	Creation Time	Operation
窗 Membership	Drinks	Static	No	All Drinks	Enabled	20/10/2021 11:02 AM	Edit Delete
聞 Marketing						Total 1 piece(s) of data <	1 > 30 / page >
El Coupons							
Messaging							
Crders							
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor_							
Products							
Payment Methods							
<u>ш</u> settings							

Instruction Manual:

1) Support searching by name;

## Step 2: Click the [Create] button

Techsun							Alevin $\sim$
ᢙ Home Ø Analytics	Search by name	Q					+ Create
条 Customers	Name	Condition Type	All Products	Desc	Enabled Status	Creation Time	Operation
හ Membership	Drinks	Static	No	All Drinks	Enabled	20/10/2021 11:02 AM	Edit Delete
聞 Marketing						Total 1 piece(s) of data <	1 > 30 / page ~
El Coupons							
Messaging							
Crders							
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor_							
Products							
Payment Methods							
A Settings							

Step 3: After entering specific information on the creation page, click Save

Techsun							Alevin ~
ය Home	Home > Orders > Product Group	s > Create					
Analytics	Basic Info						
冬 Customers							
업 Membership	* Name:	promotiom product					
দি Marketing	All Products:	● No 🔵 Yes					
Coupons	Product Filter Condition:						
Messaging							
Crders							
Orders	Condition Type:	Static v					
Store Groups	Enabled Status:	Disabled v					
store croups	• Desc:	12.12. promotiom product					
Stores							
Product Groups	Creation Time:	Creation Time #					
Product Categor	creduon nine.						
Products	Modification Time:	Modification Time					
Payment Methods							
A Settings							
:=				Cancel	Save		

Step 4: After saving, click Edit to add the product

Techsun								Alevin ~
ය Home	Search by name	0						+ Create
Analytics				4000				
A Customers	Name	Condition Type	All Products	Desc		Enabled Status	Creation Time	Operation
创 Membership	promotiom product	Static	No	12.12. promotiom	product	Disabled	14/12/2021 10:30 AM	Edit Enable Delete
Marketing	Drinks	Static	No	All Drinks		Enabled	20/10/2021 11:02 AM	Edit Delete
Messaging							Total 2 piece(s) of da	ta < 1 > 30/page~
G Orders								
Orders								
Store Groups								
Stores								
Product Groups								
Product Categor_								
Products								
Payment Methods								
🏝 Settings								
100								
Techsun								Alevin ~
ය Home	Home > Orders > Product Group	s⇒ Edit						
Analytics	Basic Info							
条 Customers								
窗 Membership	All Products:	No     Ves						
নি Marketing	Product Filter Condition:	Bulk Import Se	arch by product code			Associated Product Record	IS	
Coupons		Product Code	Product Name	Product Cate_	Product Code	Product Name		
		01000100	Courses Made	0100010				
Orders		MI000109	Sausage MMu					
Store Groups		PR1000108	Sausage MMu	CT100010				
Stores		PR1000107	Sausage MMu	CT100010				
Product Groups		PR1000106	Sausage Bisc	CT100010				
Product Categor_		PR1000105	Sausage Bisc	CT100010				
Products		Total 112 piece(s) of data <	1234>					
Payment Methods	Condition Trans	30 / page ∨ Go to	]					
A Settings	Enabled Status:	Disabled	·					
	• Desc:	12.12. promotiom produc	t					
:=					Cancel	ro		

- 1) When "No" is selected for all products, manual addition of products is required;
- 2) You can query the product you need to add through the product Code to add;
- 3) Before enabling, you can remove the products added to the group;
- 4) Support batch addition and batch removal;

# Step 5: After completing the product addition, enable the product group to complete the product group configuration

Techsun							Alevin v
ຝ Home ☑ Analytics	Search by name	٩					+ Create
冬 Customers	Name	Condition Type	All Products	Desc	Enabled Status	Creation Time	Operation
窗 Membership	promotiom product	Static	No	12.12. promotiom product	Disabled	14/12/2021 10:30 AM	Edit Enable Delete
聞 Marketing	Drinks	Static	No	All Drinks	Enabled	20/10/2021 11:02 AM	Edit Delete
El Coupons						Total 2 piece(s)	) of data < 1 > 30 / page >
Messaging     Orders							
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor							
Payment Methods							
名 Settings							
122							

#### PRODUCT CATEGORIES

## **Function Description:**

1) The system provides a standard interface to connect to the commodity classification of the external system;

# Step 1: Select the menu bar [Orders] $\rightarrow$ [Product Category] to enter the product category view interface

Techsun							SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by category code/co	stegoryQ					
舟 Customers	Product Category Code	Source	Category Type	Parent Product Category Code	Category Chinese Name	Creation Time	
创 Membership	101287	Shopee	Level 3	100725		03/12/2021 11:07 AM	
₩ Marketing	101103	Shopee	Level 3	100700		03/12/2021 11:07 AM	
El Coupons	101073	Shopee	Level 3	100695		03/12/2021 11:07 AM	
Messaging	101078	Shopee	Level 3	100695		03/12/2021 11:07 AM	_
Orders	100538	Shopee	Level 2	100531		03/12/2021 11:06 AM	
Store Groups	100539	Shopee	Level 2	100531		03/12/2021 11:06 AM	
Stores	100537	Shopee	Level 2	100531		03/12/2021 11:06 AM	
Product Groups	100540	Shopee	Level 2	100531		03/12/2021 11:06 AM	
Products	100536	Shopee	Level 2	100531		03/12/2021 11:06 AM	
Payment Methods	100543	Shopee	Level 2	100531		03/12/2021 11:06 AM	
f Settings	100548	Shopee	Level 2	100531		03/12/2021 11:06 AM	
				Total 2037 piece(s) of data	< 1 2 3 4 5	·· 68 > 30 / page	Go to

- 1) Support searching by category Code and category name;
- 2) When initializing user role permissions, user role permissions need to be controlled. For the [commodity classification] table, users only need to retain query permissions;

#### PRODUCTS

## **Function Description:**

1) The system provides standard interfaces to connect with external system product information;

## Step 1: Select the menu bar [Orders] $\rightarrow$ [Products] to enter the commodity record view interface

Techsun						SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by product category	Search by product code/product n_ Q				
条 Customers	Product Code	Product Name	Source	Product Category Code	Creation Time	
🖄 Membership	PR1000109	Sausage MMuffin	Shopify	CT100010	20/10/2021 11:00 AM	
聞 Marketing	PR1000108	Sausage MMuffin with Egg	NEWPOS	CT100010	20/10/2021 11:00 AM	
E3 Coupons	PR1000107	Sausage MMuffin with Cheese	JD Flagship Shop	CT100010	20/10/2021 10:59 AM	
C Orders	PR1000106	Sausage Biscuit	JD Flagship Shop	CT100010	20/10/2021 10:59 AM	
Orders	PR1000105	Sausage Biscuit with Egg	POS	CT100010	20/10/2021 10:59 AM	
Store Groups	PR1000104	Ice Chocolate	POS	CT100001	20/10/2021 10:59 AM	
Stores	PR1000103	ice Tea	NEWPOS	CT100001	20/10/202110:59 AM	
Product Groups Product Categor	PR1000102	Hot Tea	NEWPOS	CT100001	20/10/202110:59 AM	
Products	PR1000101	Mango Pineapple Juice	POS	C1100001	20/10/2021 10:59 AM	
Payment Methods	PR1000100	Strawberry Banana Juice	Shopify	CT100001	20/10/2021 10:59 AM	
A Settings	PR1000099	Reduced Sugar	NEWPOS	CT100001	20/10/2021 10:59 AM	
				Total 112 piece(s) of data < 1 2	3 4 > 30 / page	⊡ Go to

- 1) Support search by product ID, product Chinese name;
- 2) When initializing user role permissions, you need to control the user role permissions. For the [product record] table, the user only needs to retain the query permissions;

#### PAYMENT METHODS

#### **Function Description:**

1) The system provides a standard interface to connect to external system Payment Methods records;

## Step 1: Select the menu bar [orders] $\rightarrow$ [Payment Methods] Record View Interface

Techsun							SuperAdmin v
ຝ Home ☑ Analytics	Search by payment method code Q						
冬 Customers	Payment Method Code	Payment Method Name	Calculate Points	Source	Payment Method Category	Creation Time	Operation
窗 Membership	102	WeChat Payment	Yes	POS	RMB	24/9/2021 2:06 PM	Edit
₩ Marketing	101	Cash Payment	Yes	POS	RMB	24/9/2021 2:05 PM	Edit
E3 Coupons					Tota	1 2 piece(s) of data 🦂 🚺	> 30 / page v
Messaging							
Orders							
Store Groups							
Stores							
Product Groups							
Product Categor_							
Products							
Payment Methods							
ш зөнтуу							
12							

- 1) Support search by Payment Methods Code and Payment Methods name;
- 2) When initializing the user role permissions, you need to control the user role permissions. For the [Payment Methods Record] table, the user only needs to retain the query permissions;

## 12. SETTINGS

#### WHAT IS THE SYSTEM ROLES

The system provides system user role permission control, which is divided into users and roles. The menu and button permissions are defined through roles, and users are granted through roles, so that users have permissions corresponding to the roles, and can operate the system according to the permissions definition;

#### SYSTEM ROLES

## **Function Description:**

Create roles and define menu and button permissions through roles;

Step 1: Select the menu bar [Settings]  $\rightarrow$  [System Roles] to enter the System Roles view interface

Techsun						SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by ro	ole name Q				+ Create
条 Customers	Code	Role Name	Role Mark	Role Desc	Creation Time	Operation
匈 Membership	9	DEMO	DEMO	DEMO	30/11/2021 2:32 PM	Edit Permissions Delete
聞 Marketing	7	Trial	123	Trial role	25/11/2021 8:52 PM	Edit Permissions Delete
Coupons	6	privacyLook	privacyLook	Privacy View	06/9/2021 4:54 PM	Edit Permissions Delete
C Orders					Total 3 piece(s)	of data < 1 > 30 / page >
fit Settings						
System Roles						
System Accounts						
Operation Logs						
Channels Config						
12						

### Instruction Manual:

1) The system supports searching by role name;

## Step 2: Click the [Create] button

Techsun						SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by rol	le name Q				+ Create
条 Customers	Code	Role Name	Role Mark	Role Desc	Creation Time	Operation
窗 Membership	9	DEMO	DEMO	DEMO	30/11/2021 2:32 PM	Edit Permissions Delete
層 Marketing	7	Trial	123	Trial role	25/11/2021 8:52 PM	Edit Permissions Delete
Coupons	6	privacyLook	privacyLook	Privacy View	06/9/2021 4:54 PM	Edit Permissions Delete
Orders					Total 3 piece(	s) of data < 1 > 30 / page >
â Settings						
System Roles						
System Accounts						
Operation Logs						
citoring.						

Step 3: After entering specific information on the creation page, click Save

Techsun		SuperAdmin ~
ය Home	Home > Settings > System Roles > Edit	
Analytics	Basic Info	
条 Customers		
窗 Membership	Role Name: Please enter	
Marketing	Role Mark: Please enter	
E Coupons	Role Desc: Please enter, no more than 300 words	
Messaging		
Crders		
韵 Settings		
System Roles		
System Accounts		
Operation Logs		
Channels Config		
:=	Cancel	

Step 4: Complete the creation of the role

Techsun						SuperAdmin v
습 Home	Search by ro	le name Q				+ Create
条 Customers	Code	Role Name	Role Mark	Role Desc	Creation Time	Operation
窗 Membership	9	DEMO	DEMO	DEMO	30/11/2021 2:32 PM	Edit Permissions Delete
岡 Marketing	7	Trial	123	Trial role	25/11/2021 8:52 PM	Edit Permissions Delete
🖾 Coupons	6	privacyLook	privacyLook	Privacy View	06/9/2021 4:54 PM	Edit Permissions Delete
C Orders					Total 3 piece(s	) of data < 1 > 30 / page >
fi Settings						
System Roles						
System Accounts						
Operation Logs						
Channels Config						

Step 5: Set permissions for roles

Techsun						SuperAdmin v
<ul><li>ᢙ Home</li><li>☑ Analytics</li></ul>	Search by ro	ole name Q				+ Create
条 Customers	Code	Role Name	Role Mark	Role Desc	Creation Time	Operation
≌ Membership	9	DEMO	DEMO	DEMO	30/11/2021 2:32 PM	Edit Permissions Delete
間 Marketing	7	Trial	123	Trial role	25/11/2021 8:52 PM	Edit Permissions Delete
El Coupons	6	privacyLook	privacyLook	Privacy View	06/9/2021 4:54 PM	Edit Permissions Delete
Messaging     Orders					Total 3 piece(s)	of data < 1 > 30 / page >
fit Settings						
System Roles						
System Accounts						
Operation Logs						
Channels Config						
12						

## Step 6: Configure the corresponding permissions

Techsun					SuperAdmin v				
ය Home	Home > Settings > System Roles > I								
Analytics	Basic Info								
条 Customers									
窗 Membership	Permission Name	Permissions							
词 Marketing	SocialHub								
El Coupons									
Messaging	- Membership	ls it a menu?							
Corders		💽 Is it a submenu?							
La ordero		C Search		Details					
fin Settings	+ Members	C Register		C Search					
System Roles		Details		C Search					
		Details							
System Accounts		ols it a submenu?							
Operation Logs	+ Basic Points Rules	C Search		Add					
		Update		Delete					
Channels Config		Details							
		💽 Is it a submenu?							
	+ Points	C Search		Details					
		C Search		Details					
		C Search		Details					
	+ Loyalty Configuration	Is it a submenu?							
:=			Cancel Save						

1) Support menu and button level permission configuration;

#### SYSTEM ACCOUNT

### **Function Description:**

Create a system business account, assign role permissions to the system account, so that the system account has the permissions corresponding to the role, and can operate the system according to the permission definition;

Step 1: Select the menu bar [Settings]  $\rightarrow$  [System Accounts] to enter the system account view interface

Techsun							SuperAdmin v
습 Home	Search by ac	count	٩				+ Create
条 Customers	Account Name	Account	Nickname	Role	Creation Time	Operation	
窗 Membership	99	$\mathbb{T}^{n\times 2} \to \mathbb{T}$	12.1	a	02/12/2021 11:39 AM	Edit Roles	Delete
聞 Marketing	98	1000	-	÷-	01/12/2021 10:25 PM	Edit Roles	Delete
<ul> <li>Coupons</li> <li>Messaging</li> </ul>	97	2.1	10.0	-7-7	26/11/2021 1:39 PM	Edit Roles	Delete
Orders	95	112	177	1941	25/11/2021 10:09 PM	Edit Roles	Delete
<b>拾 Settings</b>	94	-	ing .	10-10, 1	25/11/2021 10:07 PM	Edit Roles	Delete
System Roles	93	8.e.	Sec	Land.	25/11/2021 10:05 PM	Edit Roles	Delete
System Accounts	92	100	100	-	25/11/2021 8:51 PM	Edit Roles	Delete
Channels Config	91		14	al angles	25/11/2021 3:04 PM	Edit Roles	Delete
	90	10	W. Sanda	1996 - Carlos Ca	18/11/2021 10:20 AM	Edit Roles	Delete
	89	1.00	10.07	2.54	13/11/2021 9:56 AM	Edit Roles	Delete
	88		9. L	P-1-2-	03/11/2021 11:17 AM Total 20 piece(s) of data	Edit Roles	Delete
=						كالك لا	oo i bage -

1) Support search by account;

## Step 2: Click the [Create] button

Techsun							SuperAdmin 🗸
습 Home I Analytics	Search by acc	ount	٩				+ Create
条 Customers	Account Name	Account	Nickname	Role	Creation Time	Operation	
12 Membership	99	100	1.1	ч.	02/12/2021 11:39 AM	Edit Roles	Delete
词 Marketing	98	$(-1)^{-1}$	+-	-	01/12/2021 10:25 PM	Edit Roles	Delete
Coupons	97		10.1	1 - J	26/11/2021 1:39 PM	Edit Roles	Delete
<ul> <li>Messaging</li> <li>Orders</li> </ul>	95	11	22	1000	25/11/2021 10:09 PM	Edit Roles	Delete
<b>治 Settings</b>	94	-	94 C.	dear-	25/11/2021 10:07 PM	Edit Roles	Delete
System Roles	93		2.2	2048	25/11/2021 10:05 PM	Edit Roles	Delete
System Accounts	92	- 10	120	7	25/11/2021 8:51 PM	Edit Roles	Delete
Operation Logs	91	ang tang tang tang tang tang tang tang t	14 C - 1	1. March 1.	25/11/2021 3:04 PM	Edit Roles	Delete
ondining configu	90	1.0	$\mathcal{L} = \mathcal{L} = \mathcal{L}$	- 84 (14)	18/11/2021 10:20 AM	Edit Roles	Delete
	89	100	1.000	2-1-1 K	13/11/2021 9:56 AM	Edit Roles	Delete
	88	-	4.111	- Contraction of the second	03/11/2021 11:17 AM	Edit Roles	Delete
				То	tal 20 piece(s) of data	< 1 >	30 / page >

Step 3: After entering specific information on the creation page, click Save

Techsun		SuperAdmin v
ය Home	Home > Settings > System Accounts > Edit	
Analytics	Basic Info	
条 Customers		
🖄 Membership	Account: Please enter	
সি Marketing	Password: Please enter	
E3 Coupons	Nickname: Please enter	
Messaging	Phone Number: SG+65      Please enter	
Crders	Email: Please enter	
fil Settings	Multi-factor Verification: 🗌 Yes 💿 No	
System Roles		
System Accounts		
Operation Logs		
Channels Confia		
:==	Cancel	

## Step 4: Complete the creation of the role

Search by act	count	Q				+ Creat
Account Name	Account	Nickname	Role	Creation Time	Operation	
99	Demo001	Demo	Trial	02/12/2021 11:39 AM	Edit Roles	Delete
98	$\min_{i \in \mathcal{I}}  \mathcal{I}_i  \leq 1$	44.1		01/12/2021 10:25 PM	Edit Roles	Delete
97		140	at such	26/11/2021 1:39 PM	Edit Roles	Delete
95		125	10% a	25/11/2021 10:09 PM	Edit Roles	Delete
94	$e_{i}(a) = e_{i}(a)$	44	1	25/11/2021 10:07 PM	Edit Roles	Delete
93	- 1 <sup>9</sup> 11	1.00	i-Space	25/11/2021 10:05 PM	Edit Roles	Delete
92	1112	-		25/11/2021 8:51 PM	Edit Roles	Delete
91	in a part of	10.0	and and a second se	25/11/2021 3:04 PM	Edit Roles	Delete
90	100	$\mathrm{Here}(T_{i})$	200. x	18/11/2021 10:20 AM	Edit Roles	Delete
89	10.00		1500	13/11/2021 9:56 AM	Edit Roles	Delete
88		4	aleregek.	03/11/2021 11:17 AM	Edit Roles	Delete
	Search by ocri Name 99 99 97 95 94 93 93 93 93 93 93 93 93 93 93 93 93 93	Seorch by occount       Account       Account       99     Demodol       98	Sterch by account         Q           Account         Account         Nickname           99         Demo00         Demo           98	Second by account     Account     Nakname     Role       98     Demo03     Demo     Triol       98     Image: Account     Image: Account     Image: Account       98     Image: Account     Image: Account     Image: Account	Second by second       Account       Nickrame       Role       Creation Time         99       Demood       Demo       Trial       02/12/2021 13:9 AM         98       Demood       Demo       Trial       02/12/2021 13:9 AM         97       Demood       Demo       Trial       02/12/2021 13:9 AM         98       Demood       Demo       Trial       02/12/2021 13:9 AM         97       Demood       Demo       Trial       02/12/2021 13:9 AM         98       Demo       Demo       Demo       02/12/2021 13:9 AM         98       Demo       Demo       Demo       02/12/2021 30:0 AM         99       Demo       Demo       Demo       Demo       Demo         98       Demo       Demo       Demo       Demo       Demo         98       Demo       Demo       Demo       Demo       Demo         98       Demo       Demo       Demo       Demo       Demo      <	second by account       Account       Nickname       Role       Creation Time       Operation         98       Demo001       Demo       Trioi       0/12/2021 102.9 M       Edit Roles         98       Demo01       Demo       Trioi       0/12/2021 102.9 M       Edit Roles         97       Image: Second Biology       Image: Second Biology       Edit Roles       26/11/2021 100.9 M       Edit Roles         98       Image: Second Biology       Image: Second Biology       Image: Second Biology       Edit Roles         97       Image: Second Biology       Image: Second Biology       Image: Second Biology       Edit Roles         98       Image: Second Biology       Image: Second Biology       Image: Second Biology       Edit Roles         99       Image: Second Biology         99       Image: Second Biology         88       Image: Second Biology       Image: Second Biology       Image: Second Biology       Image: Second Biology       Image: Second Biology

Step 5: Assign roles to users

Techsun							Supe	rAdmin v
ක Home							-	Create
Analytics	Account	Assessed	hilalaanaa	auto.		Oscalia - Vince	Counties.	
务 Customers	Name	Account	Nickname	Role		Creation Time	Operation	
Membership	99		1.1	7		02/12/2021 11:39 AM	Edit Roles Delete	
E Coupons	98					01/12/2021 10:25 PM	Edit Roles Delete	
Messaging	97			1944		26/11/2021 1:39 PM	Edit Roles Delete	
Crders	95	- 15 a. a.	e Taran	den en e		25/11/2021 10:09 PM	Edit Roles Delete	
fit Settings	94	-	- 10			25/11/2021 10:07 PM	Edit Roles Delete	
System Roles	93	812	54 m	1 (m)		25/11/2021 10:05 PM	Edit Roles Delete	
System Accounts	92	10 <sup>-1</sup>	M. P			25/11/2021 8:51 PM	Edit Roles Delete	
Channels Config	91	$a_{\rm s}(a_{\rm s},b_{\rm s})$	A			25/11/2021 3:04 PM	Edit Roles Delete	
	90	- 20	14.46	Intelligence in the second sec		18/11/2021 10:20 AM	Edit Roles Delete	
	89	10.00	22.0	1915		13/11/2021 9:56 AM	Edit Roles Delete	
	88	$\sim 10$	4.11			03/11/2021 11:17 AM	Edit Roles Delete	
						Total 20 piece(s) of data	< 1 > 30/	page∨
Techsun							Supe	rAdmin v
ක Home	Home > Settings >	System Accounts >	Roles					
Analytics	Basic Info							
冬 Customers								
12 Membership	📄 privacyl 🔽 Trial	Look						
Marketing	DEMO							
Messaging								
Crders								
韵 Settings								
System Roles								
System Accounts								
Operation Logs								
chumes conig								
				Co	save			

### SYSTEM ACCOUNT PASSWORD MODIFICATION

## **Function Description:**

The login user can complete the password modification through the password modification function;

Techsun Return		tus ∨		
	Welcome to Techsun			
	Password login Verification code login			
	* E-mail			
	Please enter your email			
	* Password			
	Please enter 8-16 digits and letters (case sensitive)			
	Forgot the password			
	Log In			
	I have read and agreed to the "Privacy Policy"			

## Step 1: Use the assigned account to complete the system login

## Step 2: Modify the password in the user information column

Techsun					wenw
Home	Sales () Yesterday   13/12/2021	New Orders (*) Yesterday   13/12/2021	New Customers ③ Yesterday   13/12/2021	New Members ③ Yesterday   13/12/2021	Wenwen No Data Available
Customers	<b>4,392</b> DoD 0.00%	<b>18</b> DoD 0.00%	<b>O</b> DoD	<b>O</b> DoD	Personalization Settin
Marketing	Customer Sources ③ Vesterday   13/12/2021		Order Sources ③ Yesterday   13/12/2021		6 Change Password
Coupons	Non-Members Members				Help Center
Orders Settings		2949 2862	total, 50.00%	- 36 Total - offline, 50.00%	Loyalty Configuration More >
	com offline Campaigns Overview	others tmall wechat			All > Support Email: socialhub@techsun.com
	Campaign Name	Start Time		Campaign Status	
	Newcomer lifecycle	06/12/2021 0:0	20 AM	In Progress	
	Birthday Campaign	03/12/2021 0:0	00 AM	Waiting to Start	
	Test	10/12/2021 0:0	0 AM	Draft	
	Test	10/12/2021 0:0	0 AM	Draft	
	more than 4 times	07/12/2021 0:0	00 AM	Draft	

Step 3: Complete the password modification

Techsun		wenwen v
ය Home	Change Password	
Analytics		
糸 Customers	Original Password: Please enter	
Membership	New Password: Please enter	
₩ Marketing	Confirm Password: Please enter Ø	
E3 Coupons		
Messaging		
G Orders		
酌 Settings		
:=	Cancel Save	

### **13. BEST PRACTICES**

- McDonald' s: Based on the Social Hub platform, the brand has integrated omni-channel consumers including but not limited to (APP, WeChat applet, Alipay, Web, store POS, Tmall, Meituan, Ele. A centralized system to manage member interaction events such as member registration, point calculation and marketing activities. Techsun's specific cloud-native product architecture system has helped the brand cope with the monthly concentrated activities of members safely and with zero error rate for three consecutive years, and smooth transition according to the continuous growth of the business.
- Adidas: Based on the Social Hub platform, Techsun helped the brand establish a comprehensive membership loyalty system. Cooperate with points rules, coupons and other flexible promotional activities to connect to the company's existing ERP POS system. With the help of SMS, WeChat and other channels, we can realize all-round management of member data, orders data, marketing activities, integrate and mine key data, implement member life cycle management, improve user brand loyalty, enrich marketing methods, improve marketing accuracy, and reduce marketing cost.
- V.F. Group: The brand group is an American global apparel and footwear company with a market value of \$13.8 billion (2019). Founded in 1899, VF Group has grown into one of the world's largest listed apparel companies (New York Stock Exchange: VFC), with an annual turnover of more than 7 billion US dollars. Techsun helped VF Group's VANS and TNF brands complete the establishment of a 0 to 1 user loyalty management system, and replicated the CRM and CDP construction experience in the mainland area to other regions in the Asia-Pacific region. At present, it has completed the establishment of the China Taiwan and Hong Kong regions. System construction work has established a model for cross-regional user management and marketing.
- Haagen-Dazs: Founded in 1961, the brand is known for its high-quality ice cream, bringing people romantic, surprising and unique moments. It takes "only producing high-quality ice cream desserts, providing customers with unique and respectable taste experience" as the eternal brand concept. It has more than 400 stores in mainland China, with more than 5 million registered members, and its members contribute nearly 18% of sales. Techsun helped the brand establish a complete membership management system, and supported the development of differentiated loyalty programs and points systems based on its different product lines. Currently, it has access to more than 20 channels for the brand to truly unify user data across all channels. Integrated management and marketing operations, the brand adopts cloud deployment and development models from CRM to CDP and other packages.

The low-coupling development model supports the rapid deployment and rapid launch of customized functions.

Baby Island: The brand has more than 9,000 stores of various types in more than 230 cities, including directly-operated stores and franchised stores. It is one of the relatively large-scale and well-known maternal and child brands in China. Techsun helped the brand build a CRM user management system and CDP user Analytics system from zero. It collected, cleaned, processed, classified, and analyzed up to 400 million user tags from the brand' s user data to form a single customer and a specific customer. The group' s label Personas system is used for the launch of operational activities and the daily maintenance of users.

## 14. FAQ

https://www.yuque.com/books/share/121b302a-3160-43ec-a7be-6ff727816f4e