

# Techsun Social Hub

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## **User Manual**

**SaaS Version**

## DOCUMENT VERSION

Date	Modifier	Version Number	Instruction
2021-02-18	Biao	V0.1	Create directory
2021-03-19	Roy	V0.2	Document content production
2021-05-26	Rayann	V0.3	Add Coupons function operation instructions
2021-06-04	Xiaojie	V0.4	Add MKT center-operation instructions for MKT activity function
2021-07-09	Rayann	V0.5	Add promotion points rule
2021-08-13	Xiaojie	V0.6	Add operation instructions for Tags function
2021-08-18	Rayann	V0.7	Add the operating instructions of the Messaging
2021-11-27	LingChing 、 WenWen	V0.8	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.

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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 co-branded 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 co-branded 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		
First-level module	Secondary module	Describe
Home		Support the business common data dashboard, including users, members, orders and other data;
Analytics	Overview	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
		2. Visual display of sales amount, return amount, number of orders, and number of return orders in each time dimension
		3. Visual display of available points, point issuance, point consumption and other data
	Customers	1. Visually display user overall analysis, user activity analysis, and user retention analysis in each time dimension
	orders	1. Visual display of sales analysis, purchase analysis, and return analysis in each time dimension
Customers	Personas	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
		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
	Segmentations	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
		3. Segmentations: display the number of target users, common recommended products, and common labels to meet business users' intuitive understanding of the characteristics of the target population
		4. Segmentations support external data services, which can be connected with corporate CRM, DMP and other systems to synchronize group data to operation and marketing systems
	Tags	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 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

		<p>ranking as the tag value;</p> <p>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;</p> <p>4) SQL label: Customize label calculation rules by writing SQL statements, and use the result returned by the SQL statement as the label value.</p>
		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.
		<p>4. Tag enable/disable function</p> <p>1) Label enablement: The system provides the function of enabling the label. After enabling the label, the label can be updated regularly and manually;</p> <p>2) Disable function: The system provides the function of disabling the label. After disabling the label, the label will not be updated regularly.</p>
		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,

		and the definition results are used for customer grouping;
Members hip	Members	Multi-channel membership access capability; 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); 1) If the level upgrade rules are not met When the 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



		<p>upgrading standard, proceed Accumulation;</p> <p>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;</p> <p>3) There can only be one member level with valid status under a member name;</p> <p>4) Accumulated points for relegation on the member account/, when refunding the order, corresponding deductions are required, but no upgrade judgment is made;</p> <p>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);</p> <p>Member downgrade service:</p> <p>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</p>
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		<p>times during the level validity period meet the conditions;</p> <p>1) Whether the relegation conditions stipulated in the level downgrade rules are met , If it is met, do the following:</p> <p>A. Create a new type of relegation membership level record according to the met level downgrade rules;</p> <p>B. Update the historical member level record status as invalid;</p> <p>C. Update the relegation accumulated points on the member account/( Cleared)</p> <p>2) If not satisfied, do the following processing;</p> <p>A. Create a new type of downgraded member level record according to the met level downgrade rules;</p> <p>B. Update the status of the historical member level record as invalid;</p> <p>C. Update the member account Accumulated points for relegation / (cleared)</p> <p>3) There can only be one member level with valid status under a member name;</p>
	Points	<p>1. Multi-channel integration capability;</p> <p>2. Support the generation of corresponding member points account according to the points group configured in the loyalty program;</p> <p>3. The points account includes the following information: accumulated points, available points, and expired points;</p> <p>4. The calculation formula of each point value:</p> <p>1) Accumulated points = orders Points + orders Promotion Points + Manual Points Adjustment</p>

		<p>Increase-Manual Points Adjustment Points Decrease-Return Points Reversal + Behavior Increase Points; (The above is the type of points record)</p> <p>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);</p> <p>3) expired points = Points expired;</p> <p>Points earned:</p> <ol style="list-style-type: none"> <li>1. Provide order interface and points calculation engine services, support the calculation of points according to basic points rules;</li> <li>2. Provide external behavior interfaces, support the acquisition of points through activities (such as external check-in points);</li> <li>3. Provide behavior marketing rules, support triggering through behavior rules Obtaining points;</li> <li>4. Provide batch marketing rules to support batch gifting of points for a specific group of people;</li> <li>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)</li> </ol>
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		<p>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;</p> <p>8. The orders points are calculated according to the order details (calculate the amount of points) Calculation;</p>
		<p>Points relationship:</p> <p>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;</p> <p>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;</p> <p>3. Points return:</p> <p>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;</p> <p>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;</p> <p>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</p>

		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;
		<p>Points expiration service:</p> <ol style="list-style-type: none"> <li>1. The point expiration service needs to be activated every day to check the points that expired on the day for processing;</li> <li>2. Start the service every morning and run the points that expire within 1 day on the day the service starts;</li> </ol>
	Basic Points Rules	<ol style="list-style-type: none"> <li>1. Social Hub supports the definition of basic points rules in the system, and supports the definition of the following types of rules:             <ol style="list-style-type: none"> <li>1) Supports the definition of basic points under different levels;</li> <li>2) Supports the definition of basic points under different stores and commodities (commodity Product Categories), as a way to earn points Conditions;</li> <li>3) Support to define the accumulation of points for different member points accounts;</li> <li>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);</li> </ol> </li> </ol>

		<p>5) Support to define whether the points can participate in the upgrade calculation ;</p> <p>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;</p>
	Promotion Points Rules	<p>1. Supports the definition of promotional points rules in the system, and supports the definition of the following types of rules:</p> <p>1) Support the definition of promotion points rules under different levels;</p> <p>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) as conditions for earning points;</p> <p>3) Support the definition of points calculation method (according to fixed amount full/according to data full) to give fixed points/gift (x) points/yuan ;</p> <p>4) Support the configuration of discount limit, when the actual payment/original price <math>\geq</math> discount limit, points will be given</p> <p>5) Support to define whether the points can participate in the upgrade calculation;</p> <p>6) Support to configure whether this integral rule can be used with other promotional integral rules</p> <p>7) Support to configure whether users can participate in this integral rule repeatedly</p>

		<p>8) Support the configuration of multiple points groups</p> <p>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;</p>
	Loyalty Configuration	<p>1. Configure loyalty program</p> <p>Loyalty program naming: support custom member loyalty code, loyalty name; (loyalty: brand membership system name)</p>
		<p>2. Configuration level</p> <p>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 (X) year, month, date; fixed period needs to be set: valid period (X) days;</p>
		<p>3. Configuration level upgrade rules</p> <p>Social Hub supports setting up and downgrading rules for each level;</p> <p>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;</p>
		<p>4. Configure points group</p> <p>Social Hub supports the setting of multiple point</p>

		<p>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. ;</p>
		<p>5. Configure cost center</p> <p>Social Hub supports setting up multiple cost centers under each Loyalty Configuration;</p> <p>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</p>
Marketing	Calendar	<p>1. You can check the date distribution of the event through the marketing calendar;</p>
	Campaigns	<p>1. Marketing activities support customizing the activity process through the free collocation of users, behaviors, rewards, messages, waiting, and A/B-test nodes.</p> <p>2. 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</p> <p>3. Support to create a new user group or select an existing user group when creating a new event</p>



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

		coupons, stacking restrictions;
	Records	<ol style="list-style-type: none"> <li>1. Provide behavioral marketing rules to support obtaining coupons triggered by behavioral rules;</li> <li>2. Provide bulk marketing rules to support batch distribution of coupons for a specific group of people;</li> </ol>
	Transfer Records	<ol style="list-style-type: none"> <li>1. You can view the user's coupon transfer information through the transfer record;</li> </ol>
Messagin g	SMS Templates for Domestics	<ol style="list-style-type: none"> <li>1. Support for configuring SMS templates; support for inserting dynamic variables, support for inserting links</li> <li>2. Preview: Support real-time preview when editing SMS template content</li> <li>3. Send SMS: Support test sending SMS and marketing activities trigger, send SMS</li> <li>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</li> </ol>
	SMS Templates for Other Areas	<ol style="list-style-type: none"> <li>1. Support configuration of SMS templates; support for inserting dynamic variables, support for inserting links</li> <li>2. Preview: Support real-time preview when editing SMS template content</li> <li>3. Send SMS: Support test sending SMS and marketing activities trigger, send SMS</li> <li>4. Data viewing: After sending SMS, perform data recording: the number of requests, the number of successes, the success rate, and the number of failures</li> </ol>
	WeChat	<ol style="list-style-type: none"> <li>1. Support the configuration of WeChat templates,</li> </ol>

	Templates	including official account template message templates and applet service message templates
	Email Templates	1. Edit email: support new email content, edit basic email information, and edit content with editor 2. Sending emails: support test sending and marketing campaign triggers, sending emails 3. Data viewing: data recording of sent emails: number of sent, number of delivered, number of users who opened the email, number of users who clicked on the link
	SMS Records	1. Support recording SMS records;
	Email Templates	1. Support recording WeChat message records;
	Wechat Records	1. Support recording email message records;
	Variables	1. Custom variable name
Orders	orderss	1. Process external channels such as POS, official website, WeChat official account, applet, Tmall, Meituan, Dianping, etc., through the system application API layer, complete transmission of member orders data into the system, manage orders, orders details, orders payment, orders discount;
	Store groupss	1. Provide store list filtering based on store attributes;
	Stores	1. The system provides a standard interface to connect to external system store records
	Product Groups	1. Provide product list filtering based on product attributes;

	Product Categories	1. The system provides a standard interface to connect to the commodity classification records of the external system;
	Products	1. The system provides a standard interface to connect to external system commodity records;
	Payment Methods	1. The system provides a standard interface to connect to external system Payment Methods records;
Settings	System Roles	1. 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 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 management (data-based services)	Data access	1. Multi-channel data access: support multi-brand, multi-channel, and multi-access mode
	Data buried point	1. Supports data burying points for multiple terminals, and also supports timing data synchronization mode to access data
	One ID	1. One ID: users integrate multi-brand and multi-channel ID to form a group ID/external Open ID
	Metadata	1. Analytics dimension definition, fact data definition, and the definition result is used for customer segmentation

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

## NEW FUNCTION

### ● V1.1 version Published April 16, 2021

- 1) 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
- 4) 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

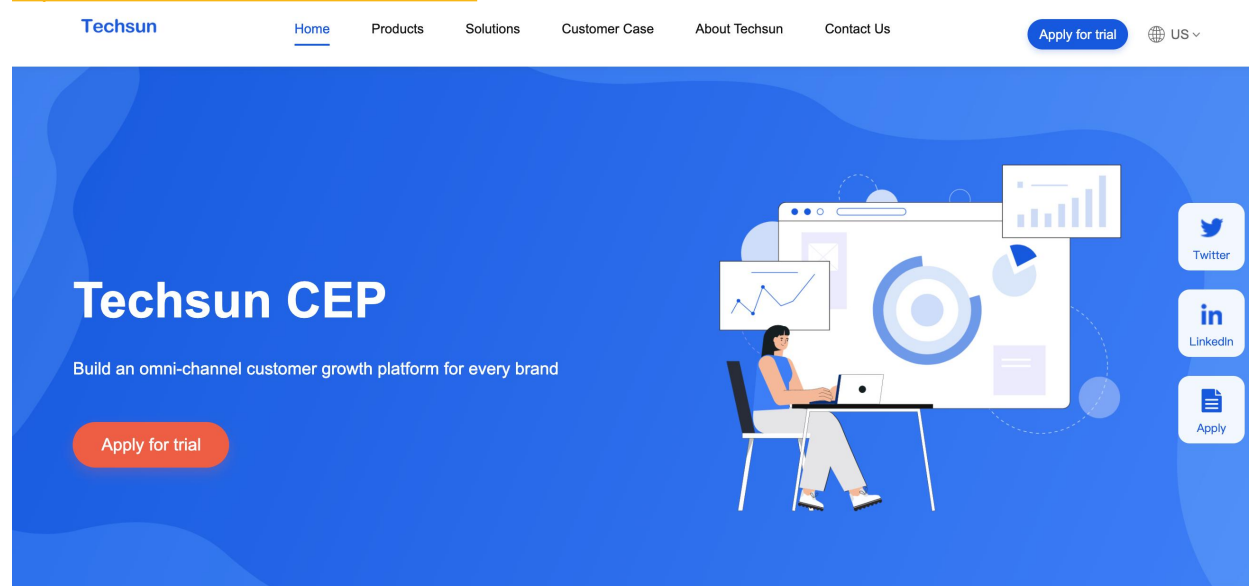


### 3. ADMINISTRATOR GUIDE

#### 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;
7. 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		✓		
Cost Center		✓		
Basic Points Rule		✓		
Product Category		✓		
Product Record		✓		
Store Record		✓		
Payment Methods		✓		

## 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?

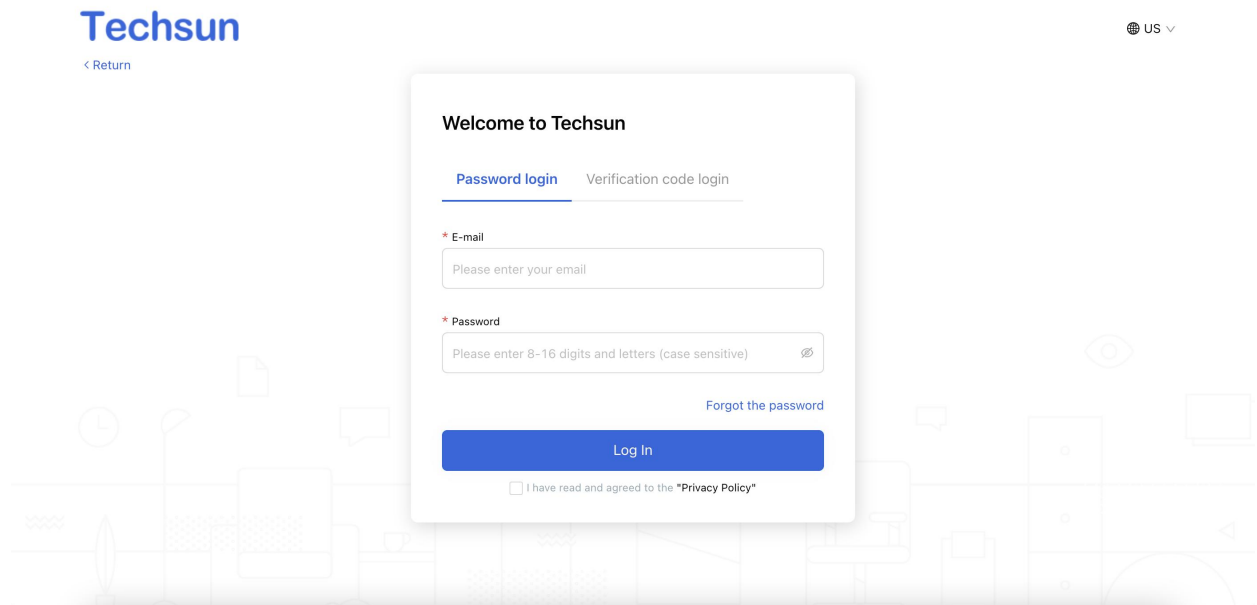
For brand clients, rules and regulations of each brand has its unique, loyalty schemes are to meet different client's brand can use their membership rules and rule configuration initialized into the system and function modules, it includes the level configuration, down-grade run rule configuration, point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

#### ● Configure membership loyalty programs

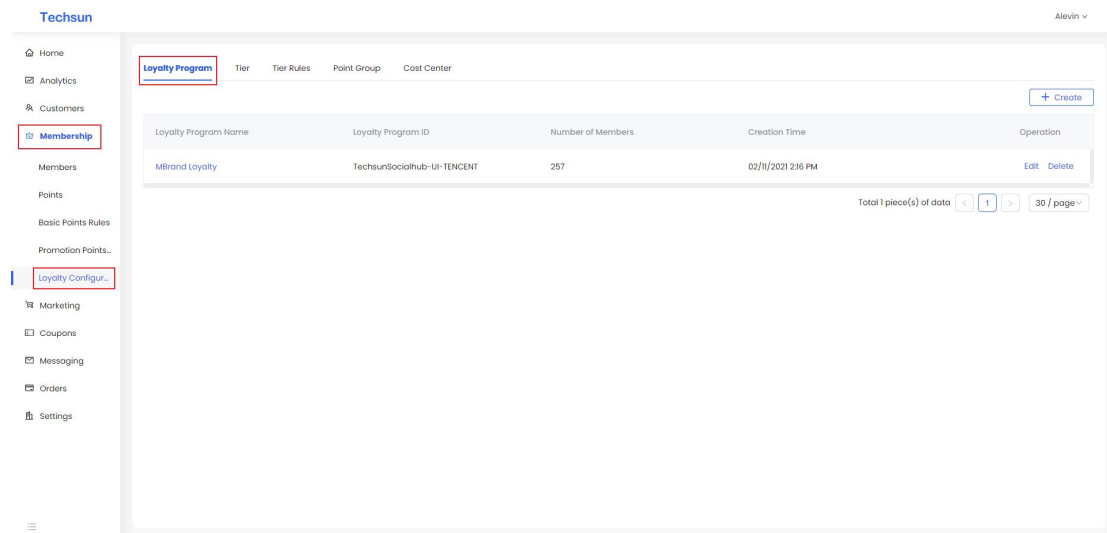
##### Function description:

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

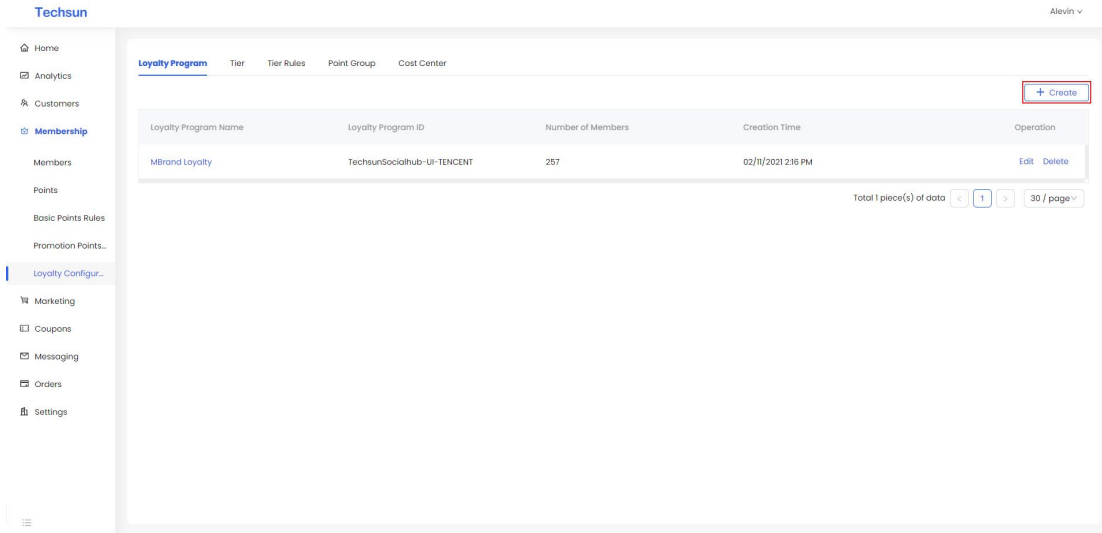


**Step 2: Select the menu bar [Membership] → [Loyalty Configuration] to enter the loyalty program view interface**

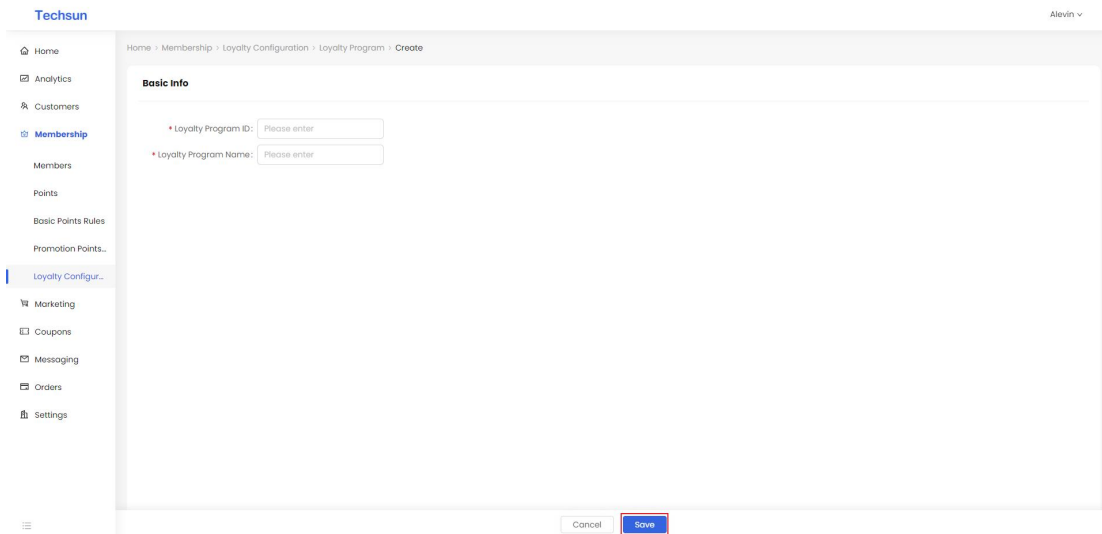


Remarks: 1) Support search by club name;

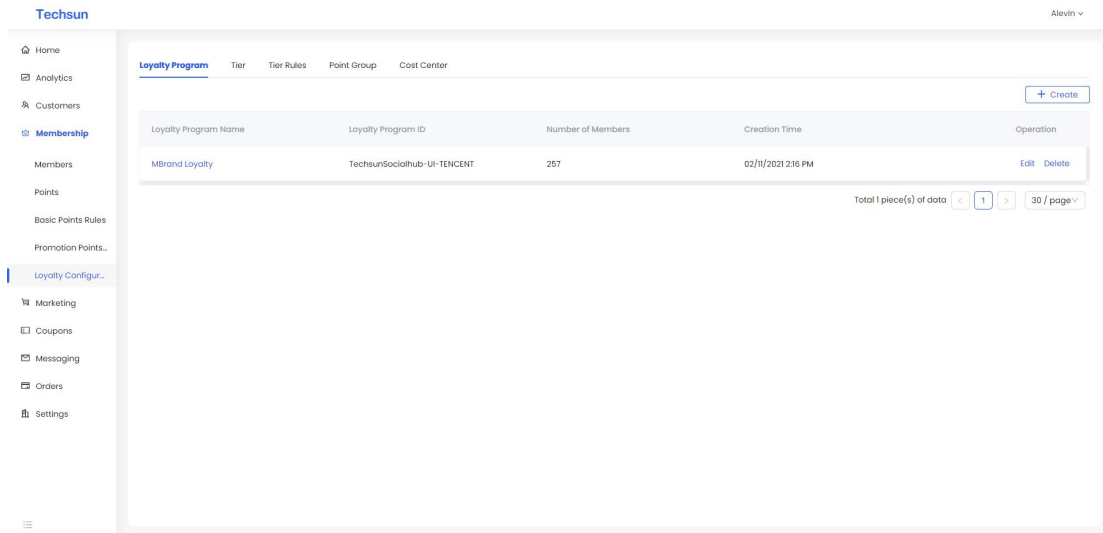
**Step 3: Click the "Create" button**



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



**Step 5: Complete the loyalty program creation**



Remarks:

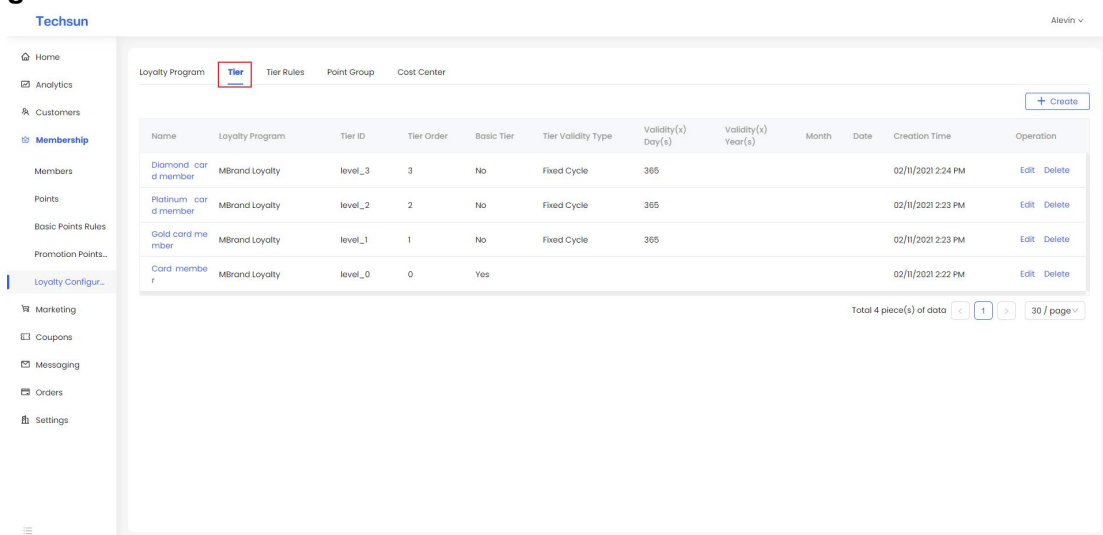
- 1) When the user role rights are initialized, it needs to be controlled. For the [loyalty program] table, the user only needs to keep
- 2) Query permission;

## ● Configuration Tier

### Function description:

- 1) Social Hub supports multiple membership levels within each loyalty program;
- 2) 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] → [Loyalty Configuration] → [Tier] to enter the grade view interface



Remarks:

- 1) Support search by grade name;

## Step 2: Click the "Create" button

Techsun Alewin

Home Analytics Customers **Membership** Members Points Basic Points Rules Promotion Points... Loyalty Configur...

Loyalty Program **Tier** Tier Rules Point Group Cost Center

[+ Create](#)

Name	Loyalty Program	Tier ID	Tier Order	Basic Tier	Tier Validity Type	Validity(x) Day(s)	Validity(x) Year(s)	Month	Date	Creation Time	Operation
Diamond card member	MBrand Loyalty	level_3	3	No	Fixed Cycle	365				02/11/2021 2:24 PM	<a href="#">Edit</a> <a href="#">Delete</a>
Platinum card member	MBrand Loyalty	level_2	2	No	Fixed Cycle	365				02/11/2021 2:23 PM	<a href="#">Edit</a> <a href="#">Delete</a>
Gold card member	MBrand Loyalty	level_1	1	No	Fixed Cycle	365				02/11/2021 2:23 PM	<a href="#">Edit</a> <a href="#">Delete</a>
Card member	MBrand Loyalty	level_0	0	Yes						02/11/2021 2:22 PM	<a href="#">Edit</a> <a href="#">Delete</a>

Total 4 piece(s) of data < 1 > 30 / page

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

Techsun Alewin

Home Analytics Customers **Membership** Members Points Basic Points Rules Promotion Points... Loyalty Configur...

Home > Membership > Loyalty Configuration > Tier > Create

**Basic Info**

\* Loyalty Program:

\* Tier ID:

\* Name:

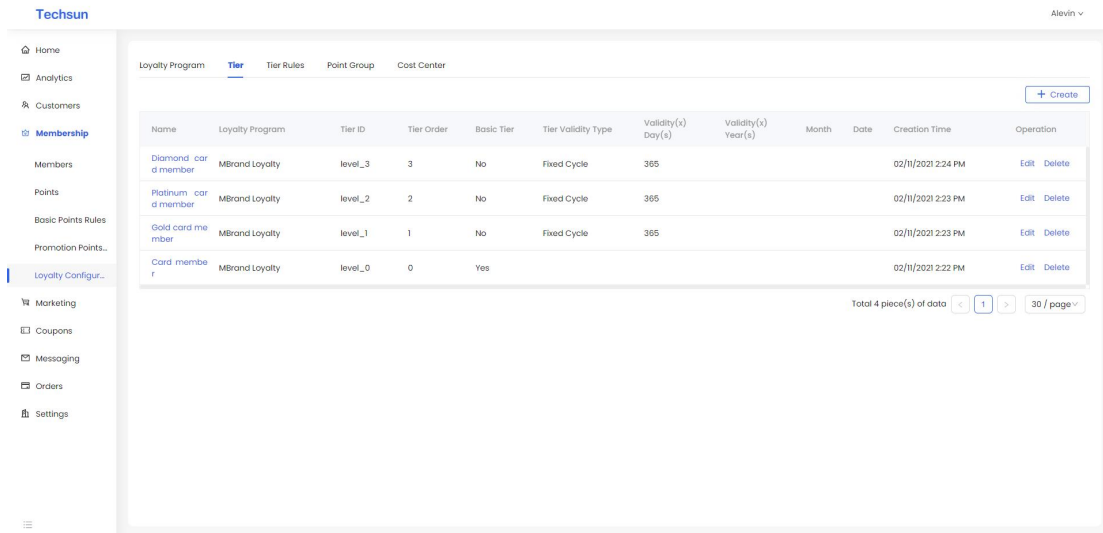
\* Tier Order:

\* Basic Tier:

\* Tier Validity Type:

[Cancel](#) [Save](#)

## Step 4: Complete tiers creation



Remarks:

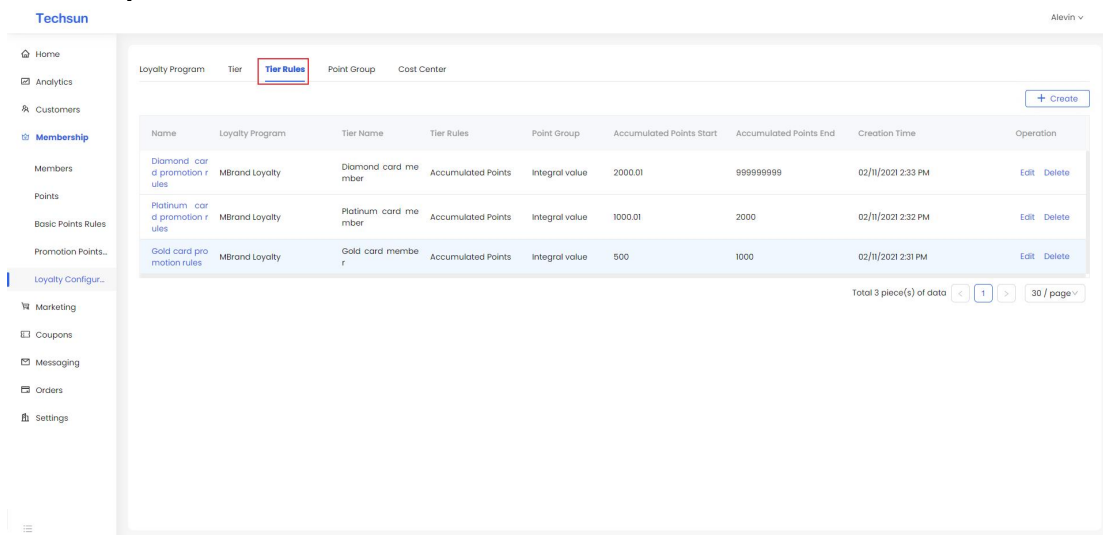
- 1) When initializing user role rights, you need to control user role rights. For the [Level] table, users only need to retain query rights.

## ● The upgrade and demotion rules are configured

Function description:

- 1) The Social Hub allows you to set up a hierarchy rule for each hierarchy;
- 2) 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] → [Loyalty Configuration] → [Tier Rules] to enter the rank promotion and demotion rule view interface**



Remarks:

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

## Step 2: Click "Create" button

The screenshot shows the Techsun Social Hub interface. On the left is a sidebar with navigation options: Home, Analytics, Customers, Membership (selected), Members, Points, Basic Points Rules, Promotion Points..., Loyalty Configur..., Marketing, Coupons, Messaging, Orders, and Settings. The main content area is titled 'Tier Rules' and includes tabs for Loyalty Program, Tier, Tier Rules (selected), Point Group, and Cost Center. A '+ Create' button is highlighted with a red box in the top right corner. Below the tabs is a table with columns: Name, Loyalty Program, Tier Name, Tier Rules, Point Group, Accumulated Points Start, Accumulated Points End, Creation Time, and Operation. The table contains three rows of data. At the bottom right, it says 'Total 3 piece(s) of data' with pagination controls showing '1' of '30' pages.

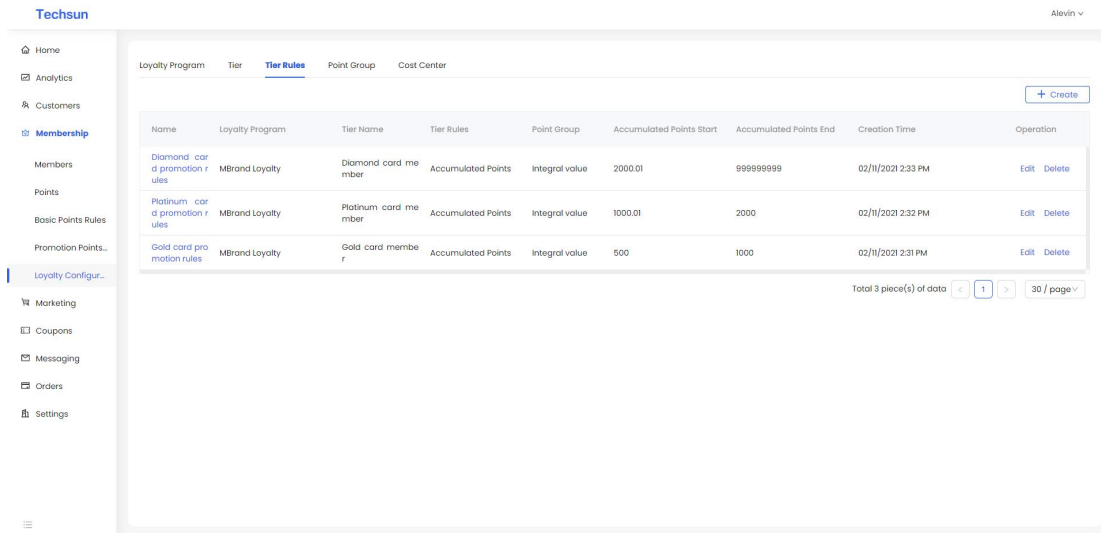
Name	Loyalty Program	Tier Name	Tier Rules	Point Group	Accumulated Points Start	Accumulated Points End	Creation Time	Operation
Diamond card promotion rules	MBrand Loyalty	Diamond card member	Accumulated Points	Integral value	2000.01	999999999	02/11/2021 2:33 PM	Edit Delete
Platinum card promotion rules	MBrand Loyalty	Platinum card member	Accumulated Points	Integral value	1000.01	2000	02/11/2021 2:32 PM	Edit Delete
Gold card promotion rules	MBrand Loyalty	Gold card member	Accumulated Points	Integral value	500	1000	02/11/2021 2:31 PM	Edit Delete

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

The screenshot shows the 'Create' page for a new tier rule. The breadcrumb trail at the top is 'Home > Membership > Loyalty Configuration > Tier Rules > Create'. The page has a 'Basic info' section with several required fields (marked with a red asterisk): Loyalty Program (dropdown), Name (text input), Tier Name (dropdown), Point Group (dropdown), Tier Rules (dropdown), and Calculation Cycle (dropdown). At the bottom right, there are 'Cancel' and 'Save' buttons, with the 'Save' button highlighted with a red box.

## Step 4: The grade update rule is created





Remarks:

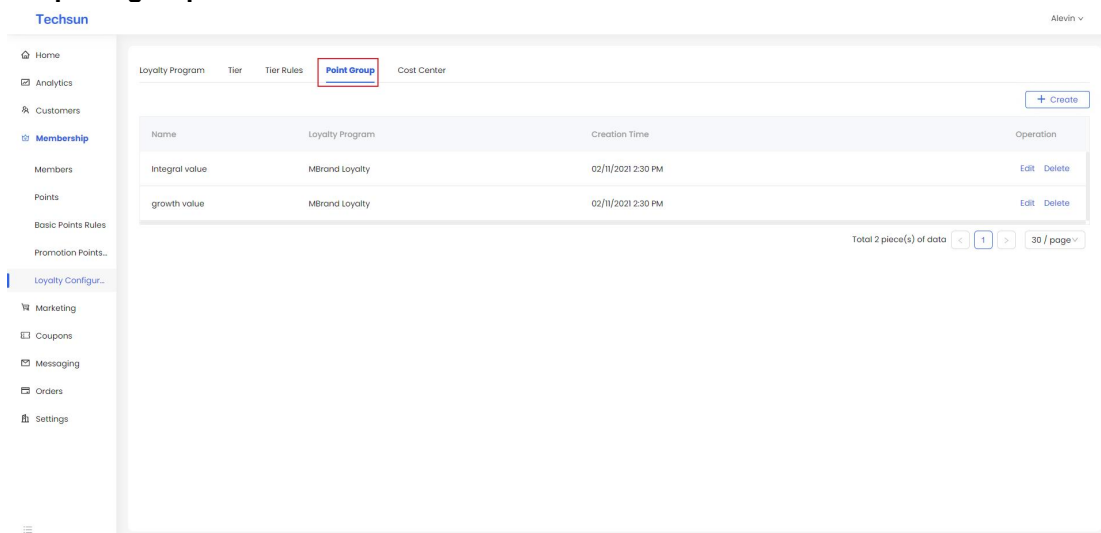
1) When initializing user role rights, you need to control user role rights. For the Grade Update Rules table, users only need to retain query rights.

### ● 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.
- 2) 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.

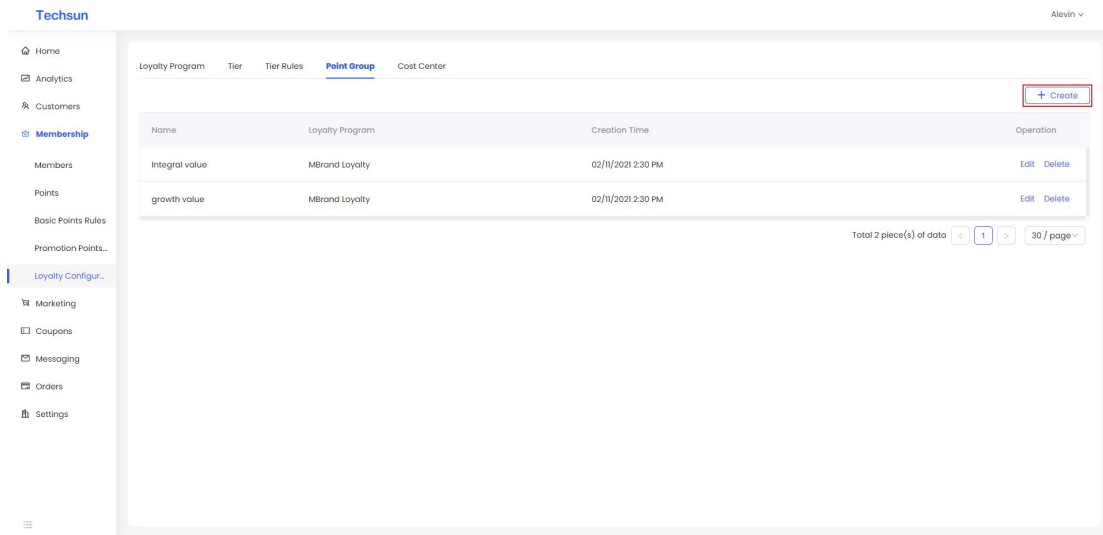
**Step 1: Select the menu bar [Membership] → [Loyalty Configuration] → [Point Group] to enter the point group view interface**



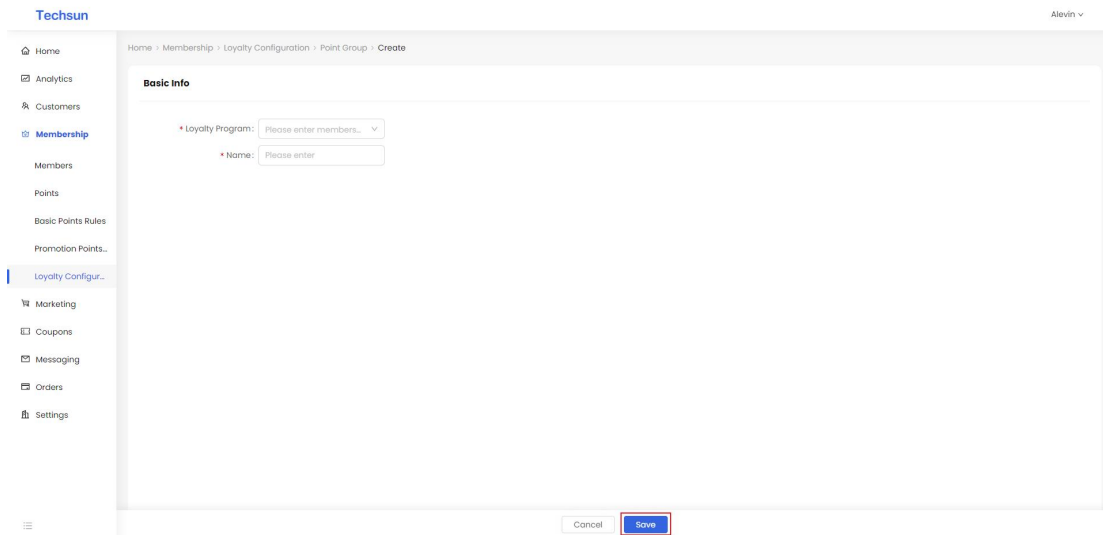
Remarks:

- 1) Support search by point group name;

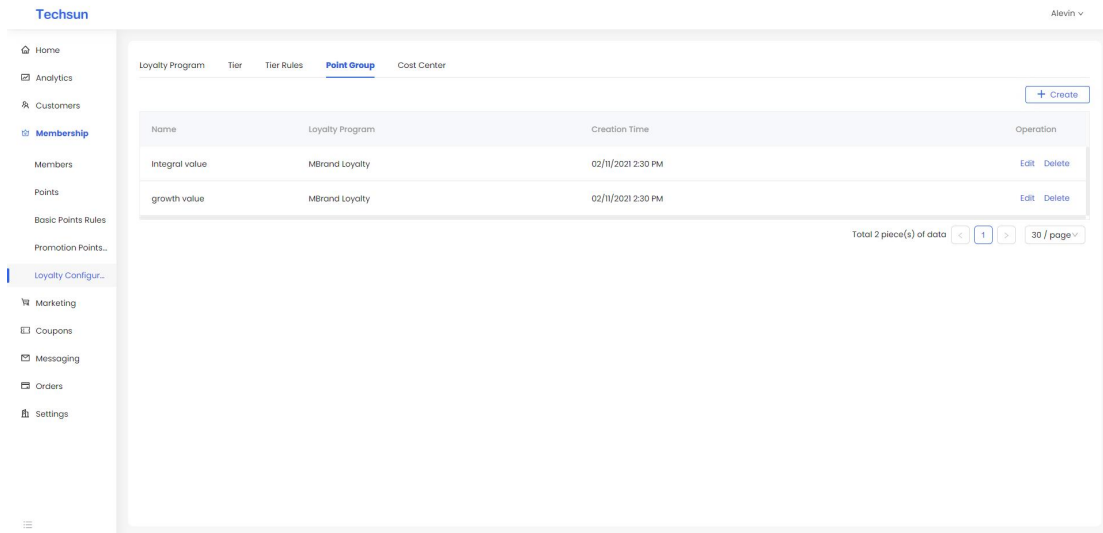
## Step 2: Click "Create" button



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



## Step 4: Complete the point group creation



Remarks:

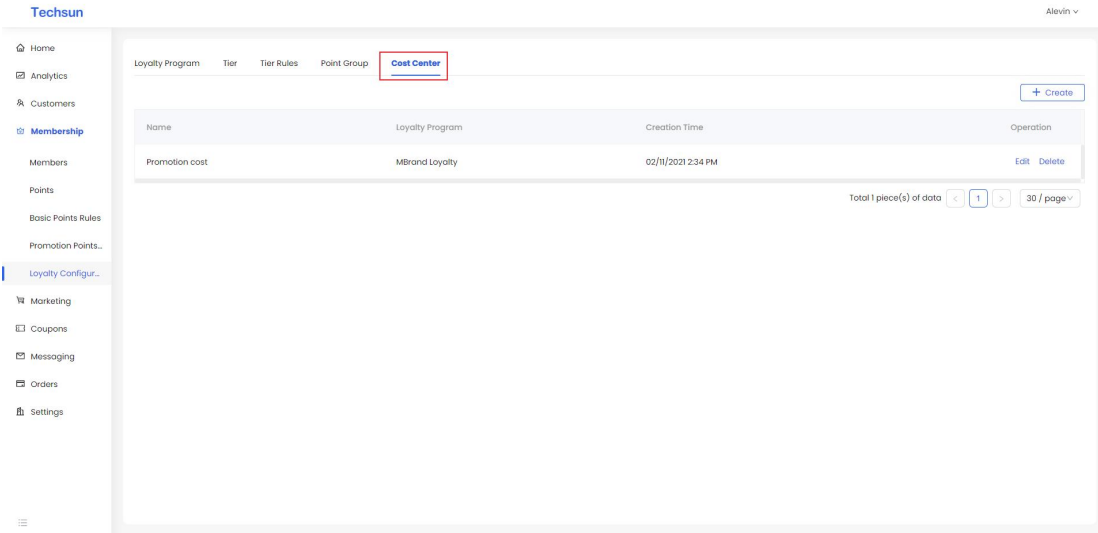
- 1) When the user role rights are initialized, the user role rights need to be controlled. For the [point group] table, the user only needs to retain the query rights.

## ● 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.

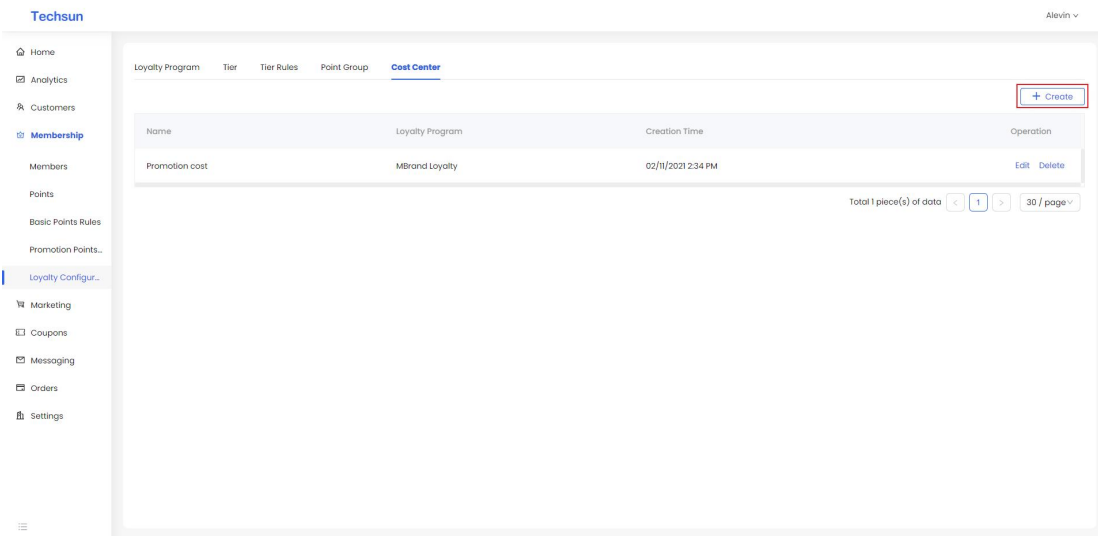
**Step 1: Select the menu bar [Membership] → [Loyalty Configuration]→ [Cost Center] to enter the cost center view interface**



Remarks:

- 1) Support search by cost center name;

## Step 2: Click "Create" button



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

Techsun Alewin ▾

Home ▾ Membership ▾ Loyalty Configuration ▾ Cost Center ▾ Create

**Basic info**

\* Loyalty Program:

\* Name:

#### Step 4: Complete the creation of the cost center

Techsun Alewin ▾

Home ▾ Analytics ▾ Customers ▾ Membership ▾ Members ▾ Points ▾ Basic Points Rules ▾ Promotion Points... ▾ Loyalty Configur... ▾ Marketing ▾ Coupons ▾ Messaging ▾ Orders ▾ Settings

Loyalty Program Tier Tier Rules Point Group Cost Center

Name	Loyalty Program	Creation Time	Operation
Promotion cost	MBrand Loyalty	02/11/2021 2:34 PM	<a href="#">Edit</a> <a href="#">Delete</a>

Total 1 piece(s) of data  30 / page ▾

#### Remarks:

- 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.

## 5. ANALYTICS

### WHAT IS ANALYTICS

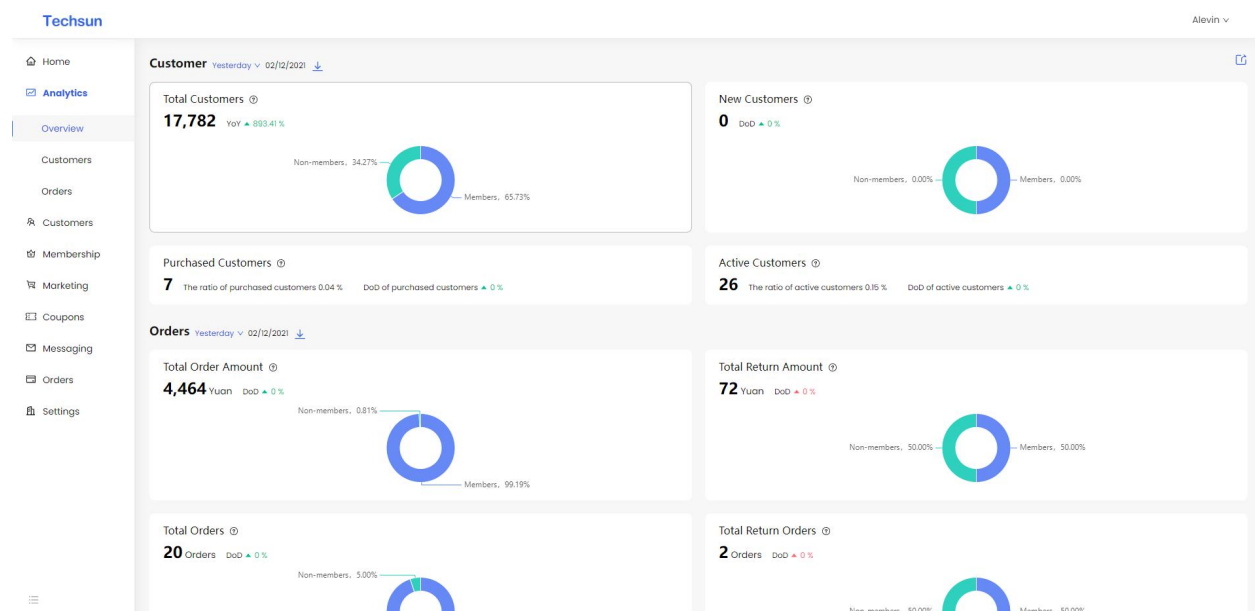
Based on Hadoop big data platform data warehouse technology , provide data visualization function;

### OVERVIEW

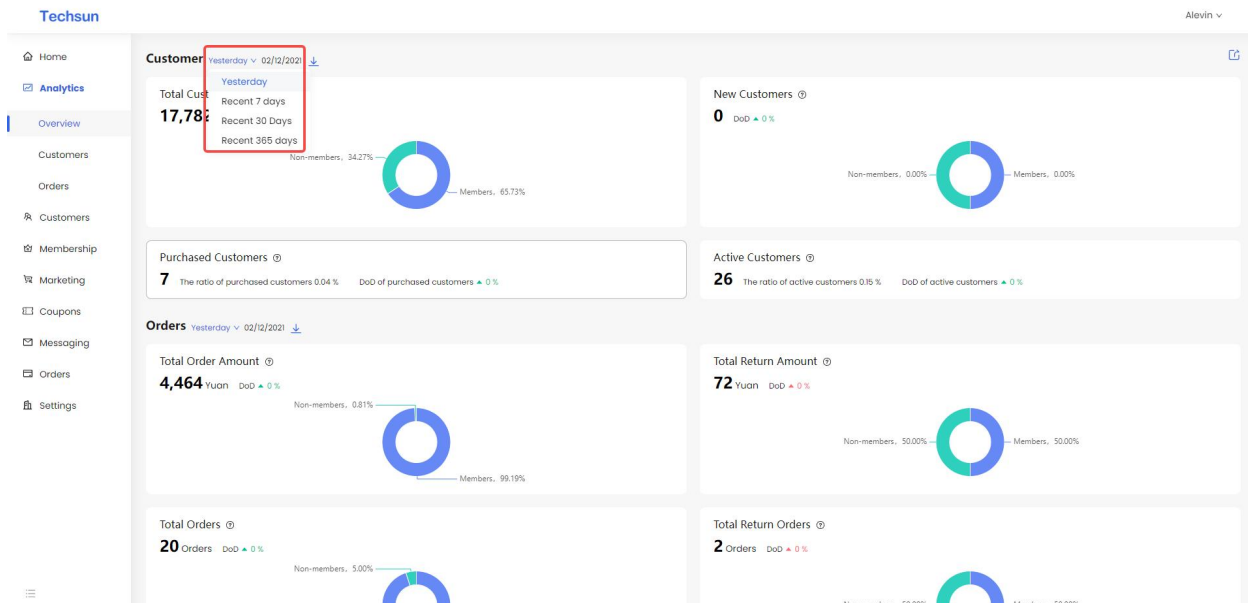
#### Function Description:

- 1) Overview display: users, orders, 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] → [Overview] to enter the overview view interface



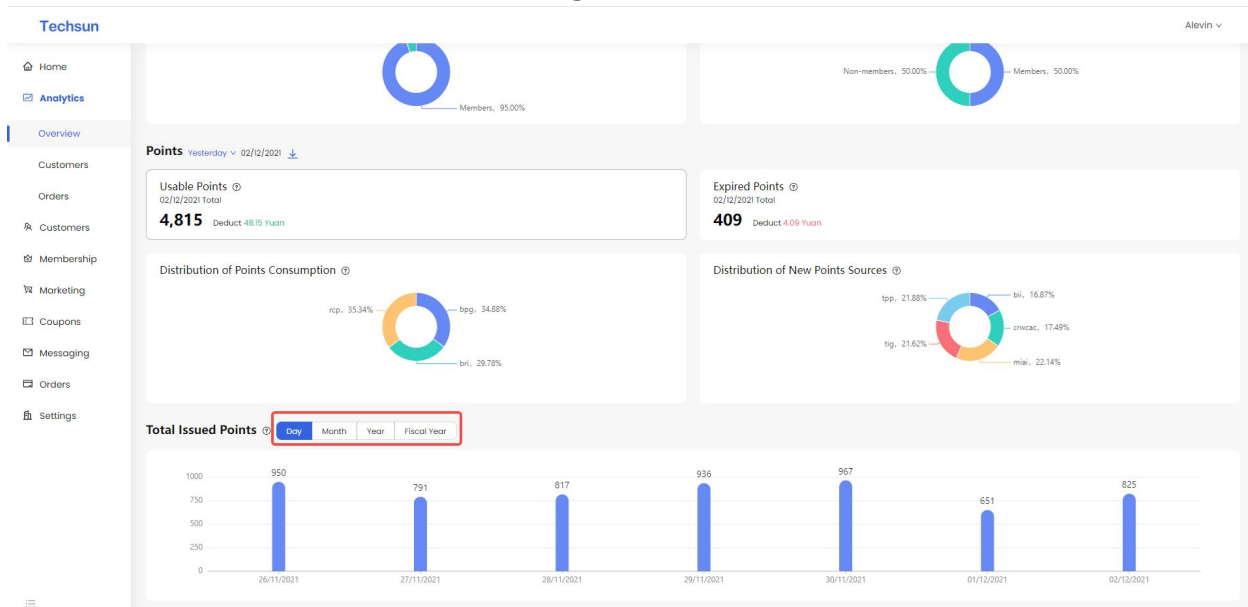
## Step 2: Click the [Yesterday] button to support date filtering



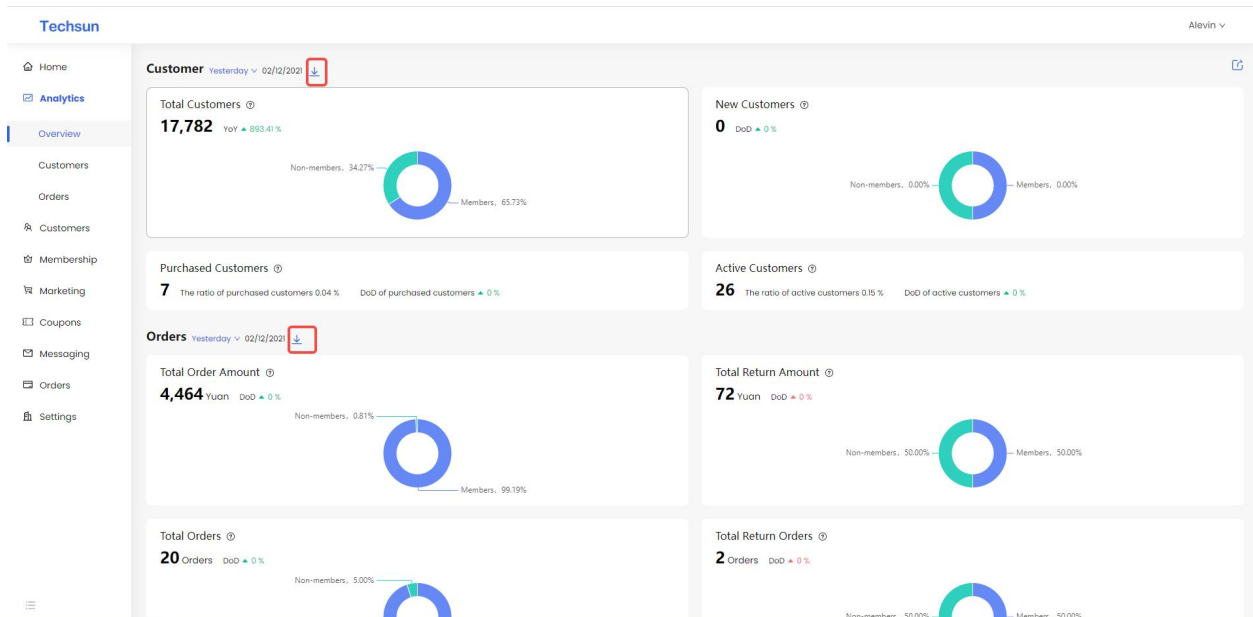
### Instruction Manual:

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

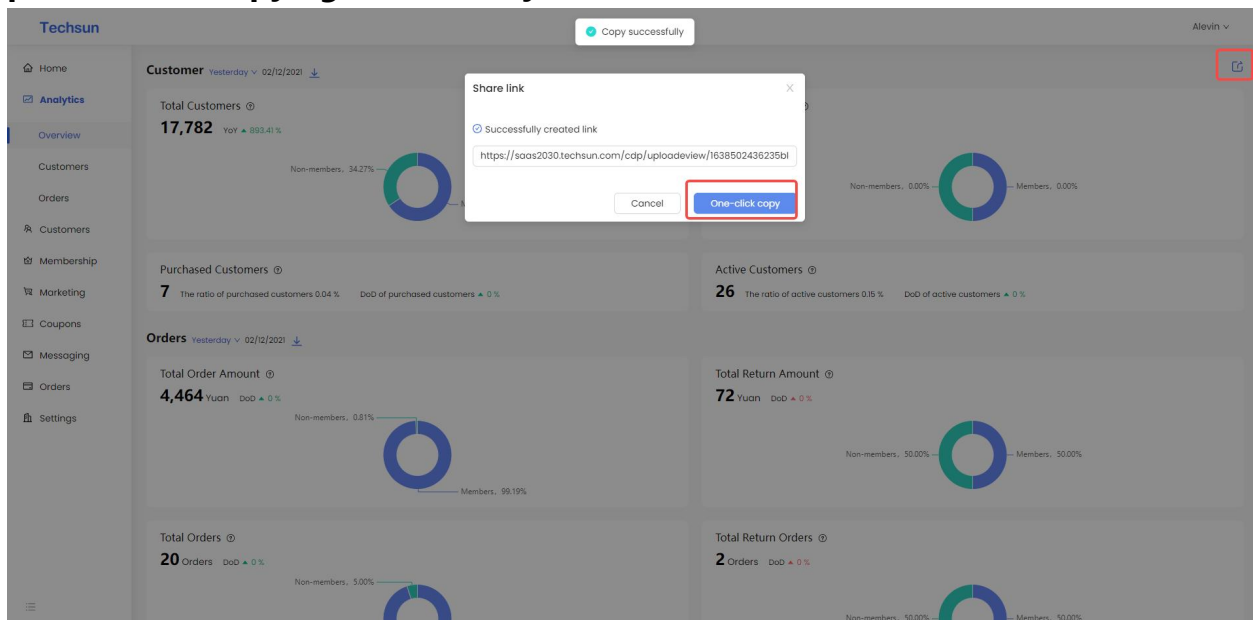
## Step 3: Click [Day], [Month], [Year], [Fiscal Year] button to support day, month, year, and fiscal year filtering



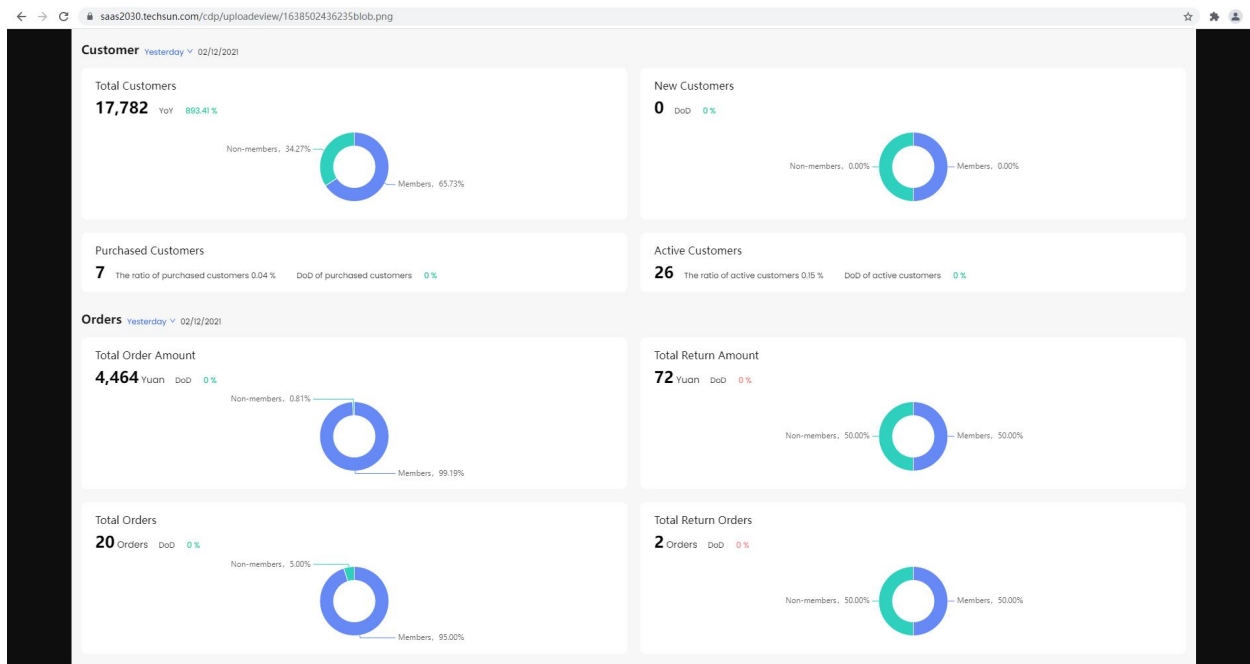
## Step 4: Click the [Download] button to support data download



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







## Instruction Manual:

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

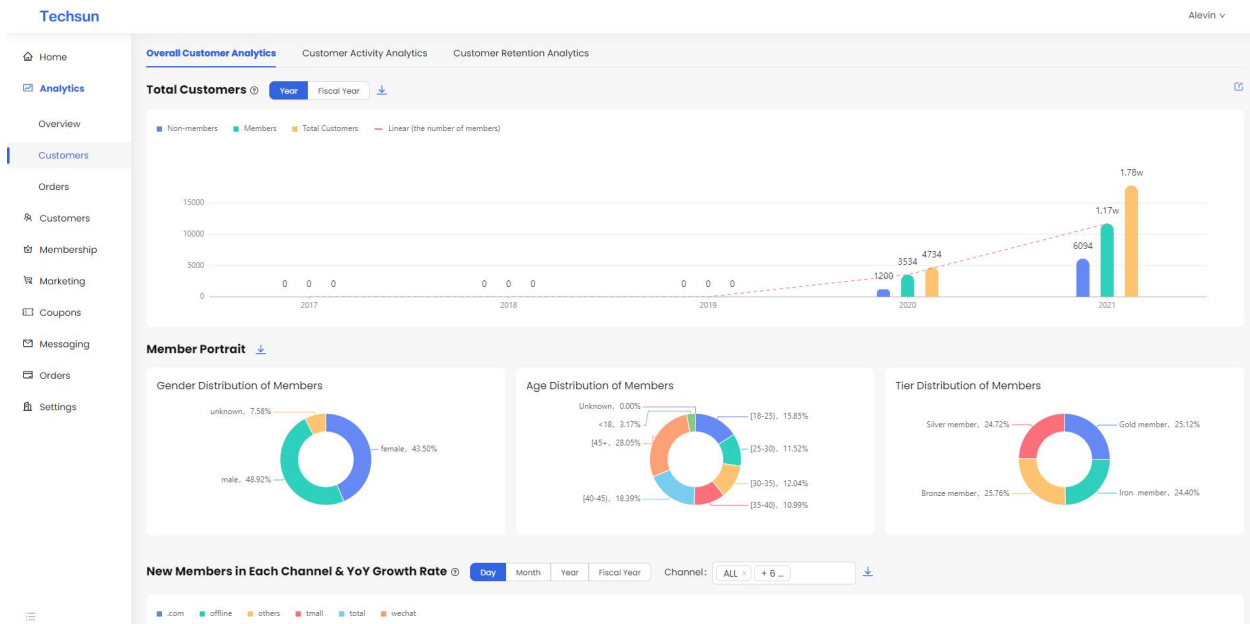
## CUSTOMERS

### Function Description:

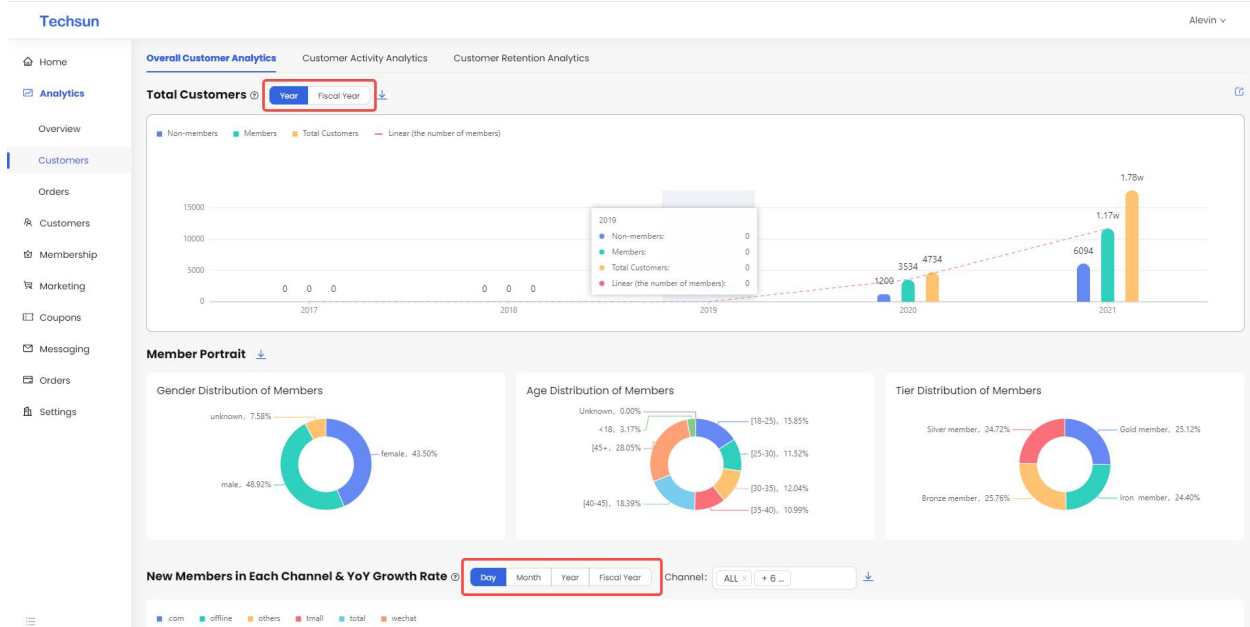
- 1) Customers display: user overall analysis, user activity analysis, user retention analysis;
- 2) Overall analysis of users: display the total number of users, member Personass, the number of new members of each channel & the year-on-year growth rate;
- 3) User activity analysis: display the number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

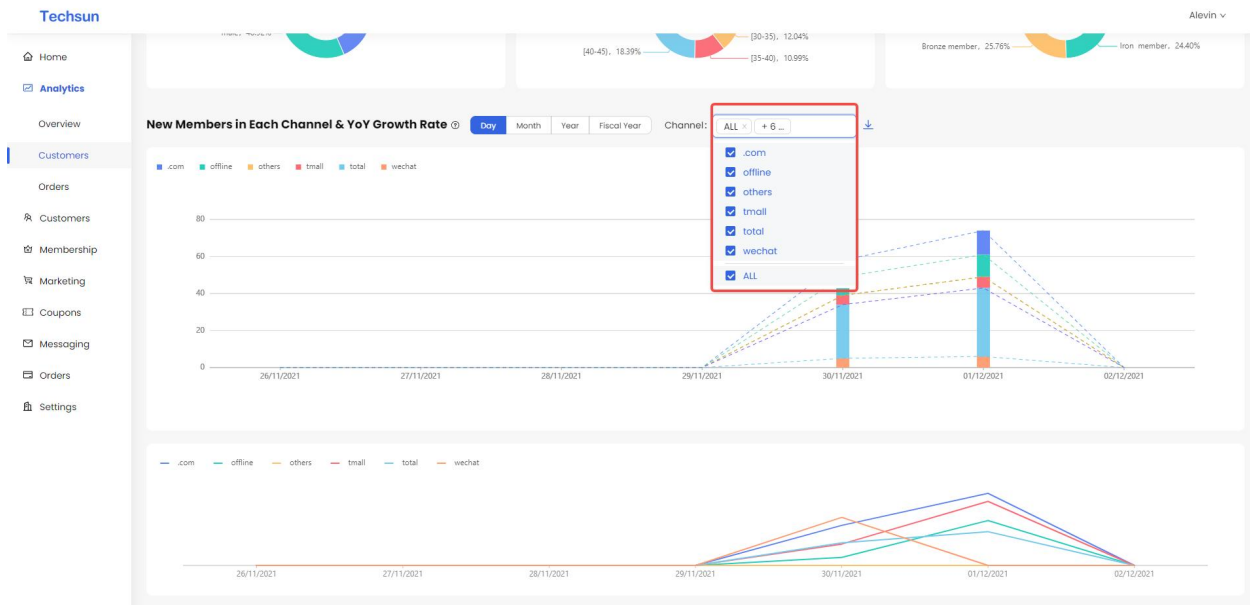
## Step 1: Select the menu bar [Analytics]→[Customers]→[Overall Customer Analytics] to enter the user overall analysis view interface



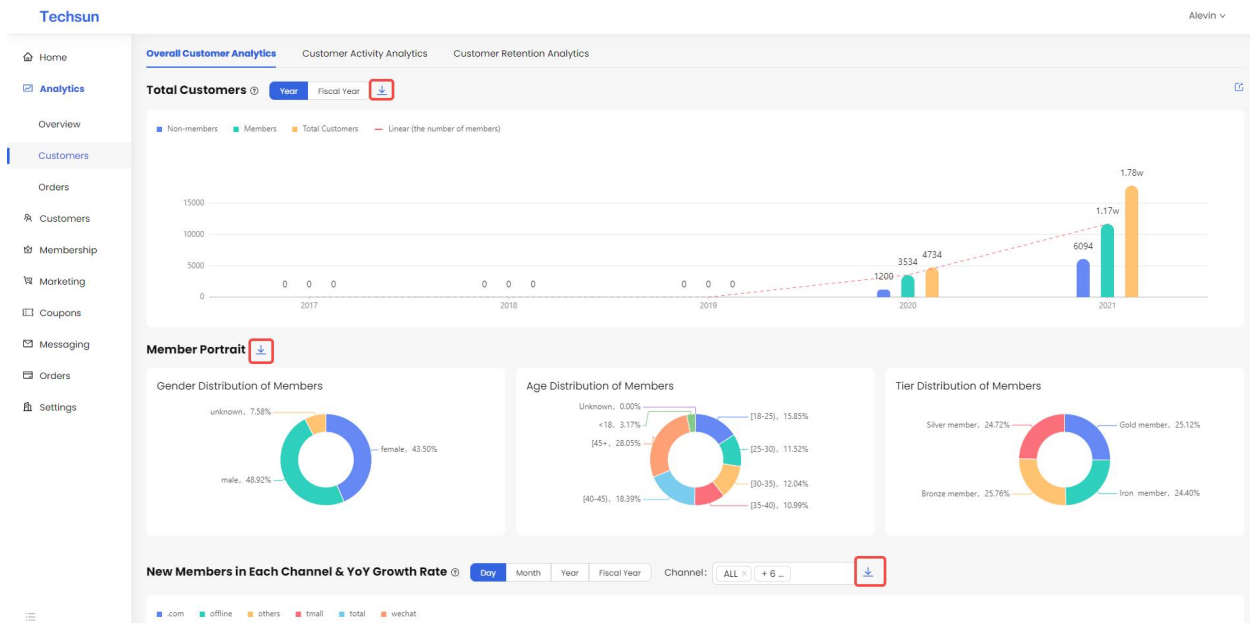
## Step 2: Click [Day], [Month], [Year], [Fiscal Year] buttons to support day, month, year, and fiscal year filtering



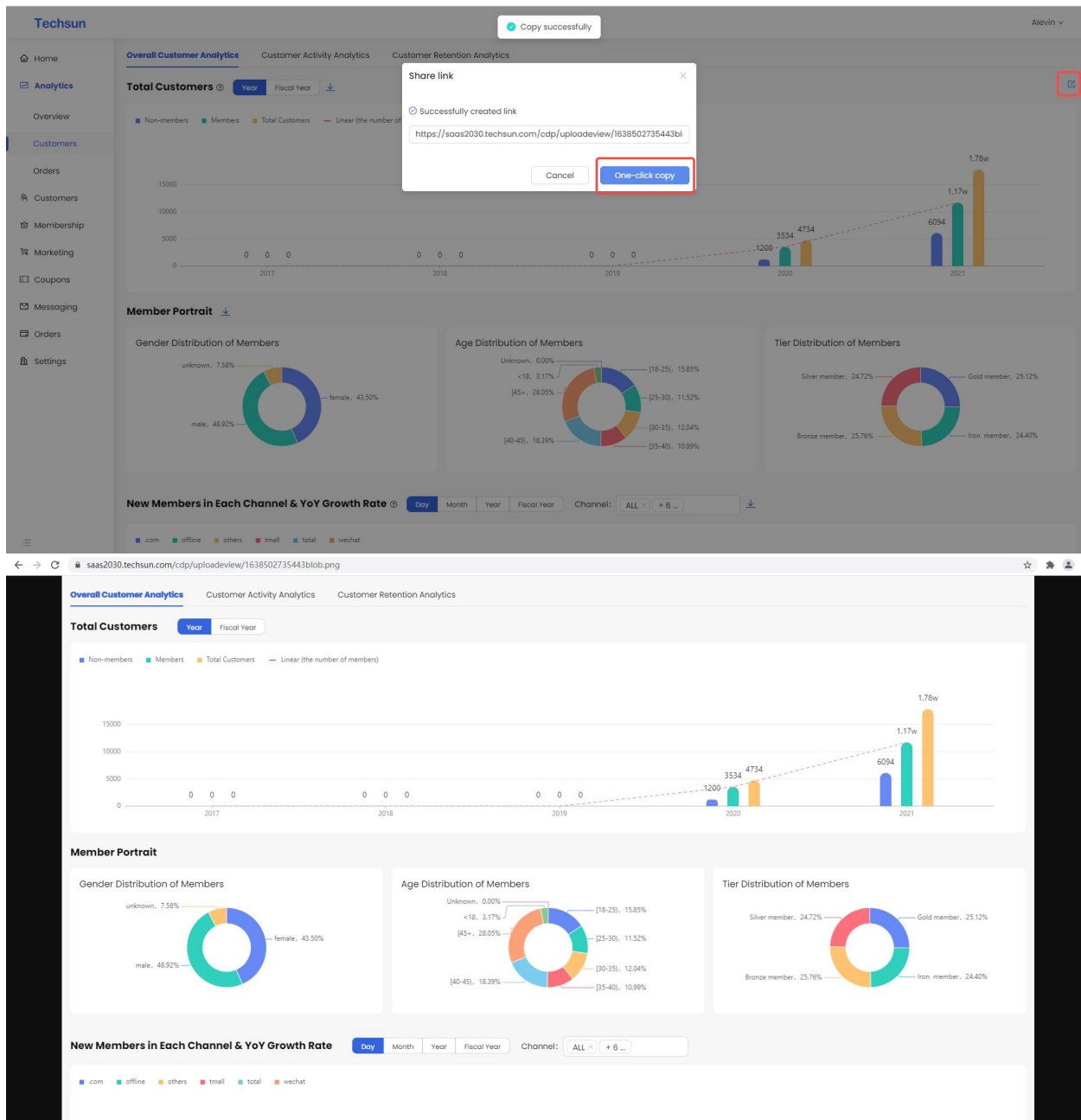
## Step 3: Click the [Channel] filter box to support channel filtering



**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**

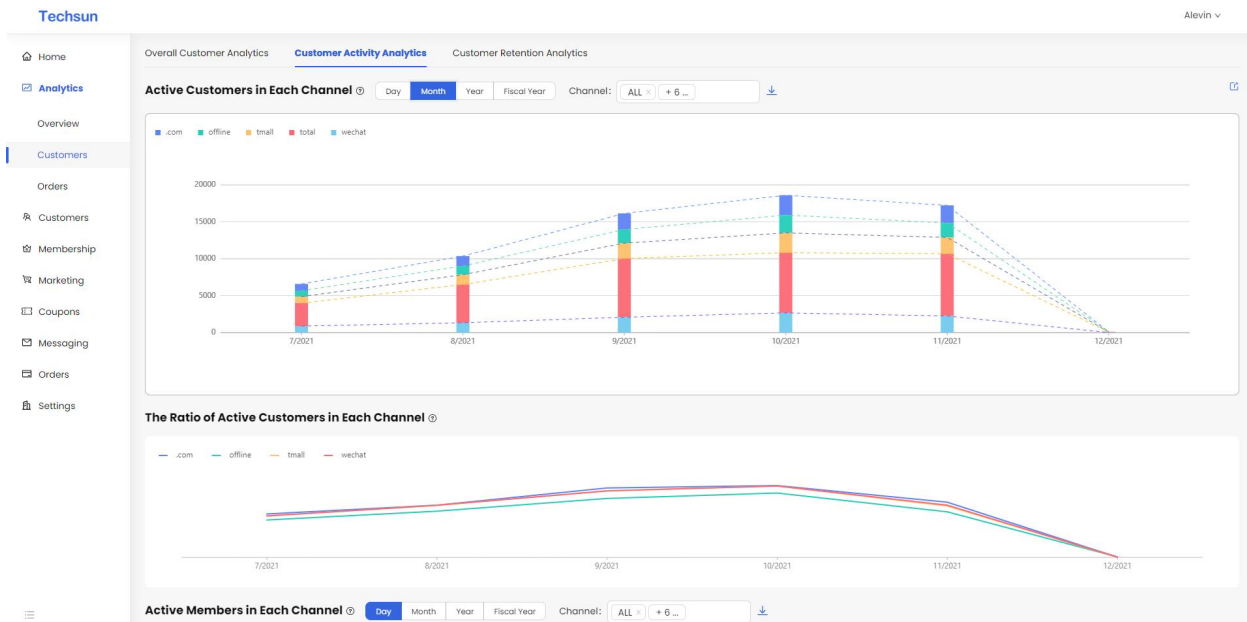


## Instruction Manual:

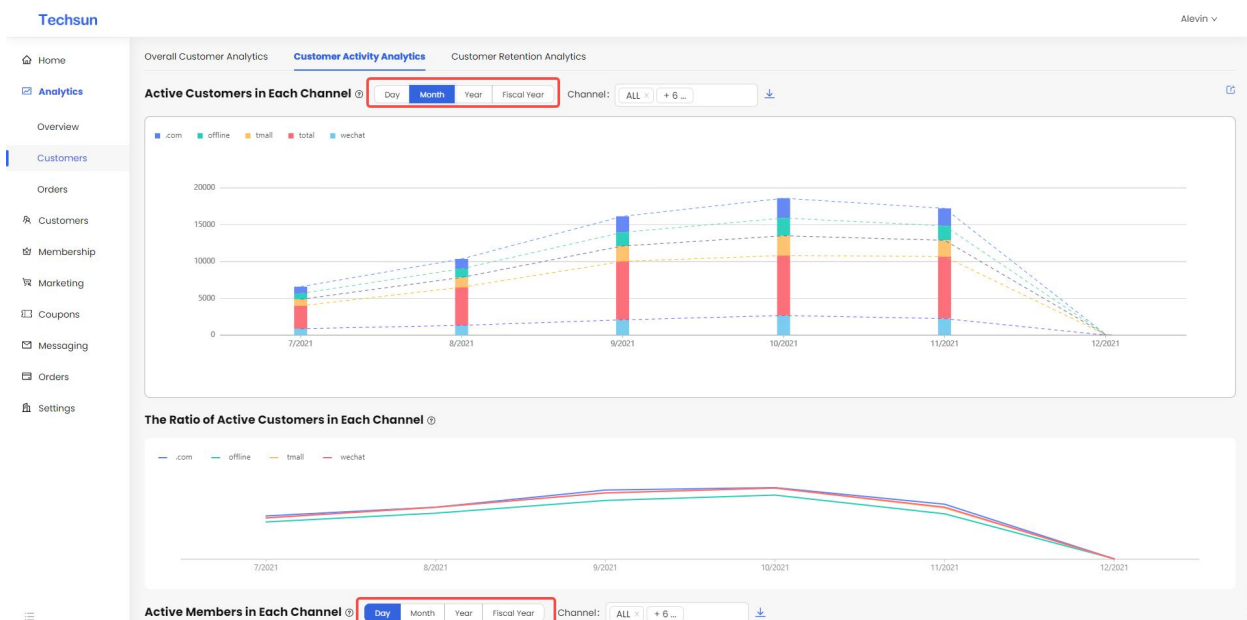
- 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

## ● User activity analysis

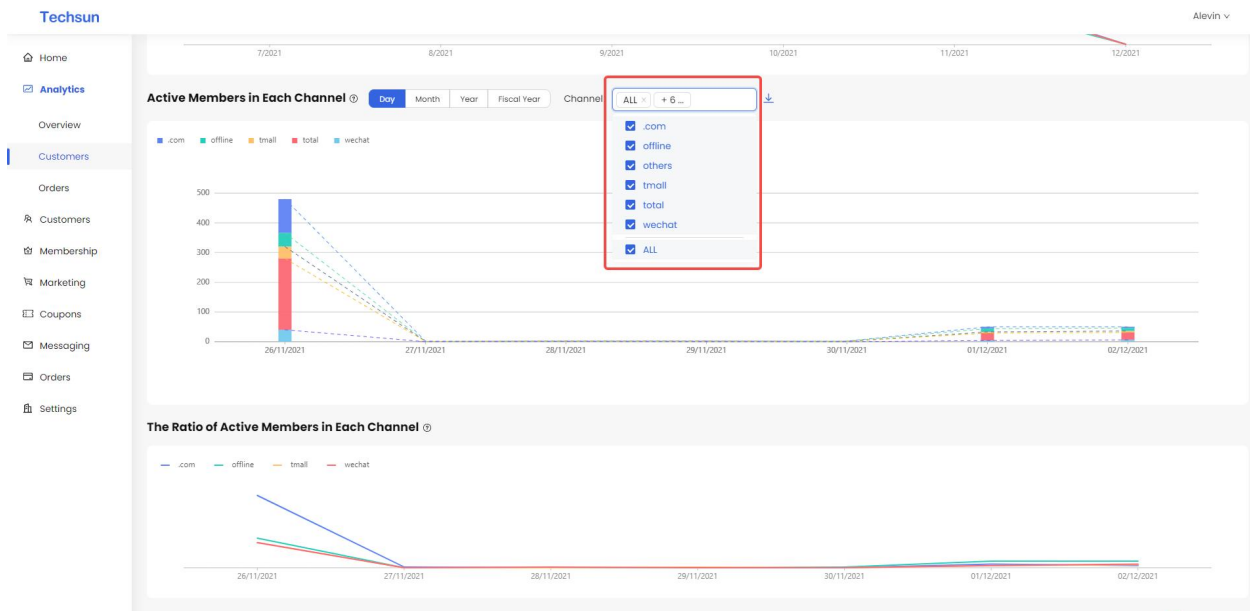
## Step 1: Select the menu bar [Analytics]→[Customers]→[Customer Activity Analysis] to enter the user activity analysis view interface



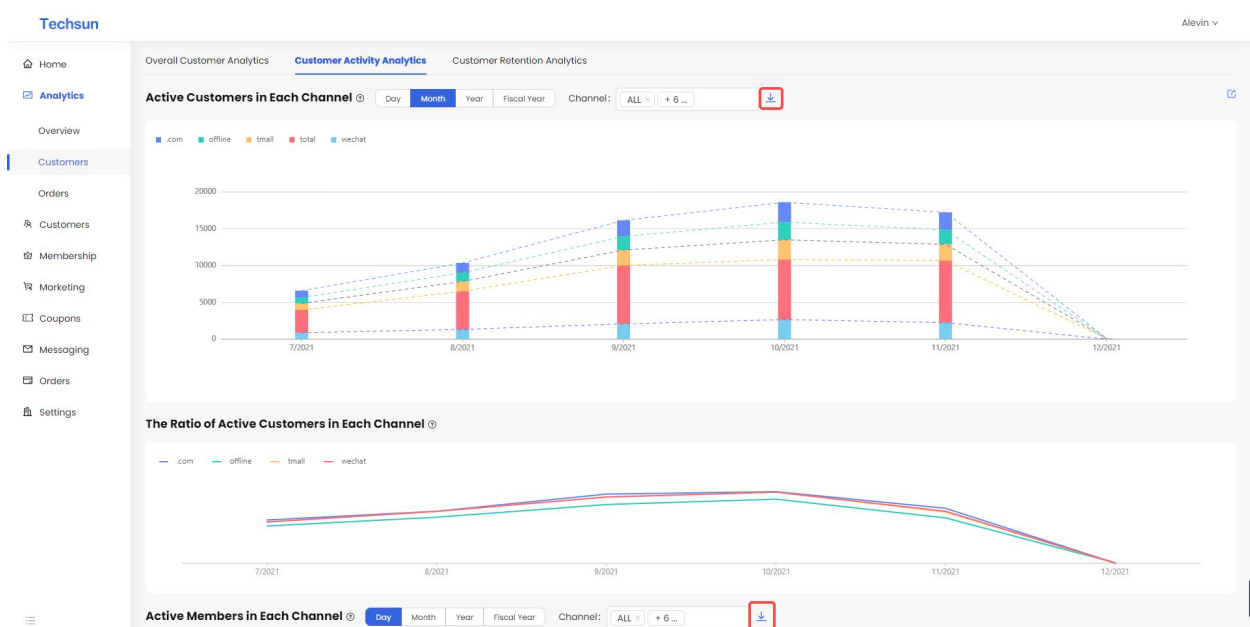
## Step 2: Click [Day], [Month], [Year], [Fiscal Year] buttons to support day, month, year, and fiscal year filtering



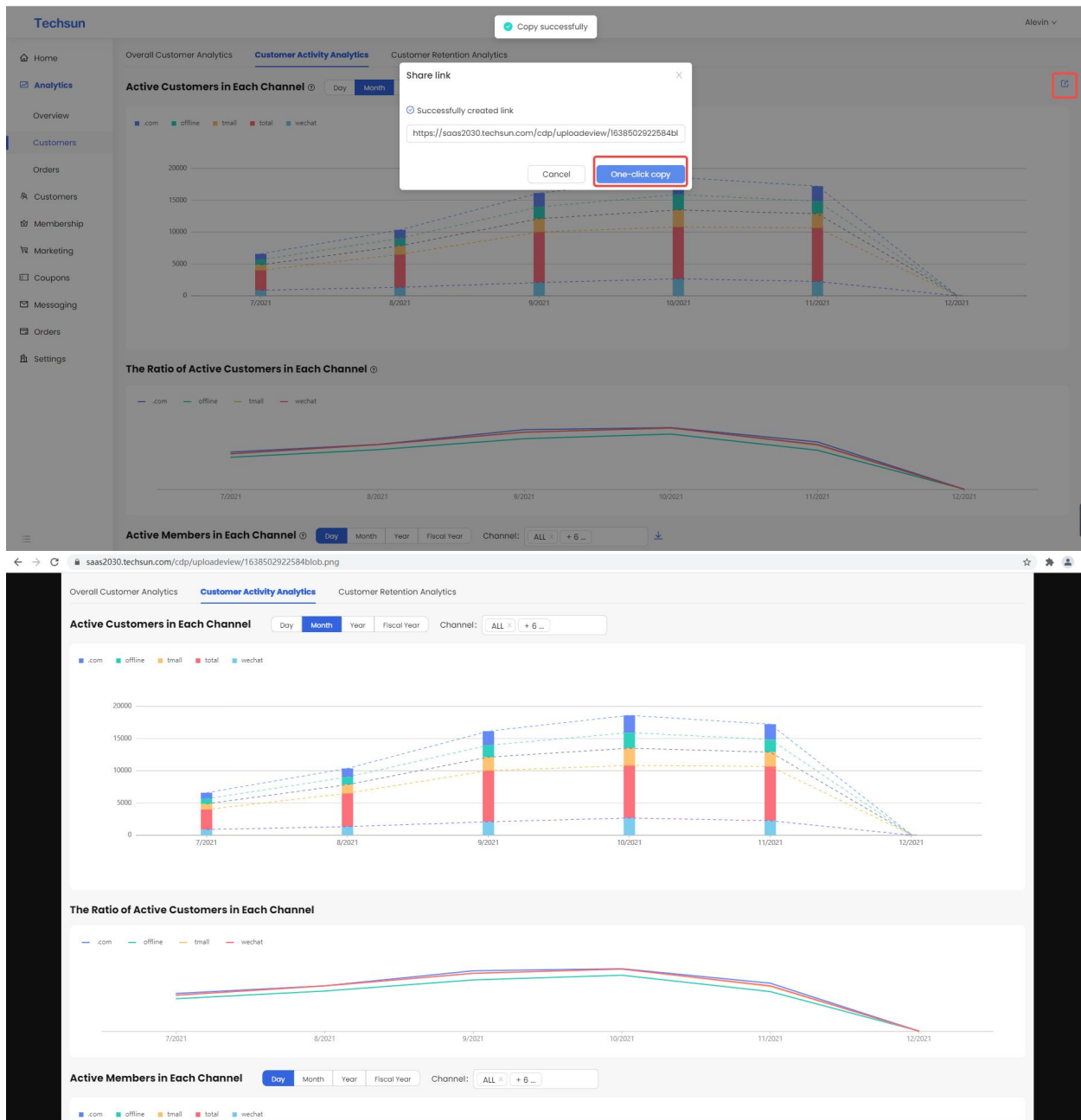
## Step 3: Click the [Channel] filter box to support channel filtering



**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**

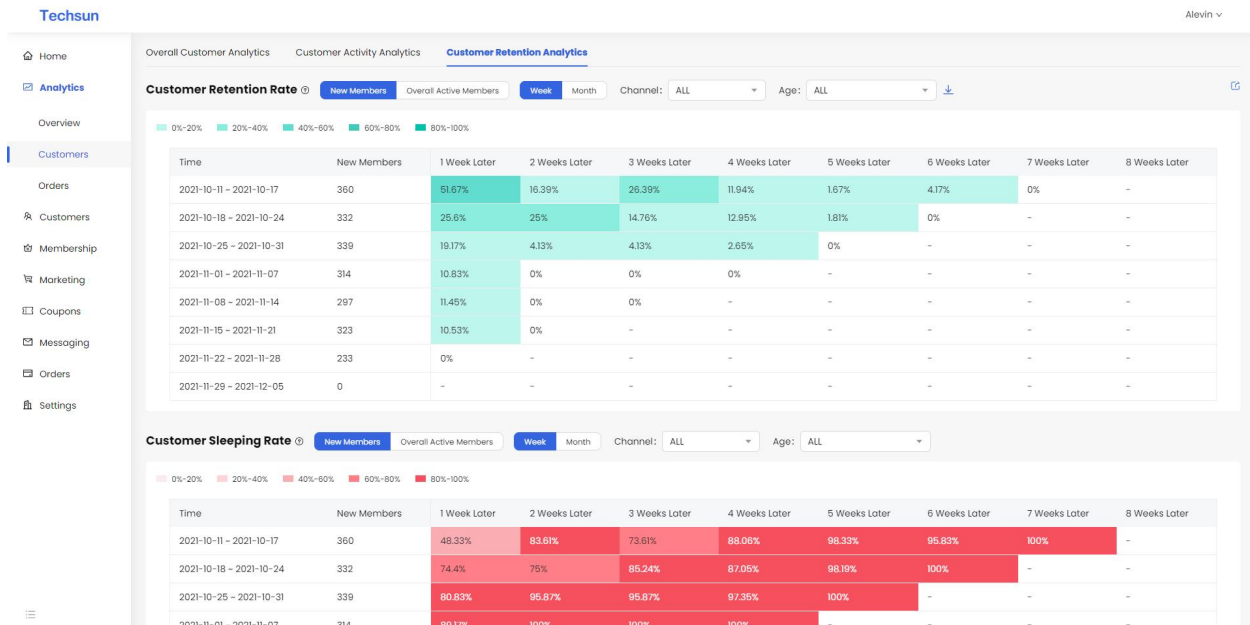


## Instruction Manual:

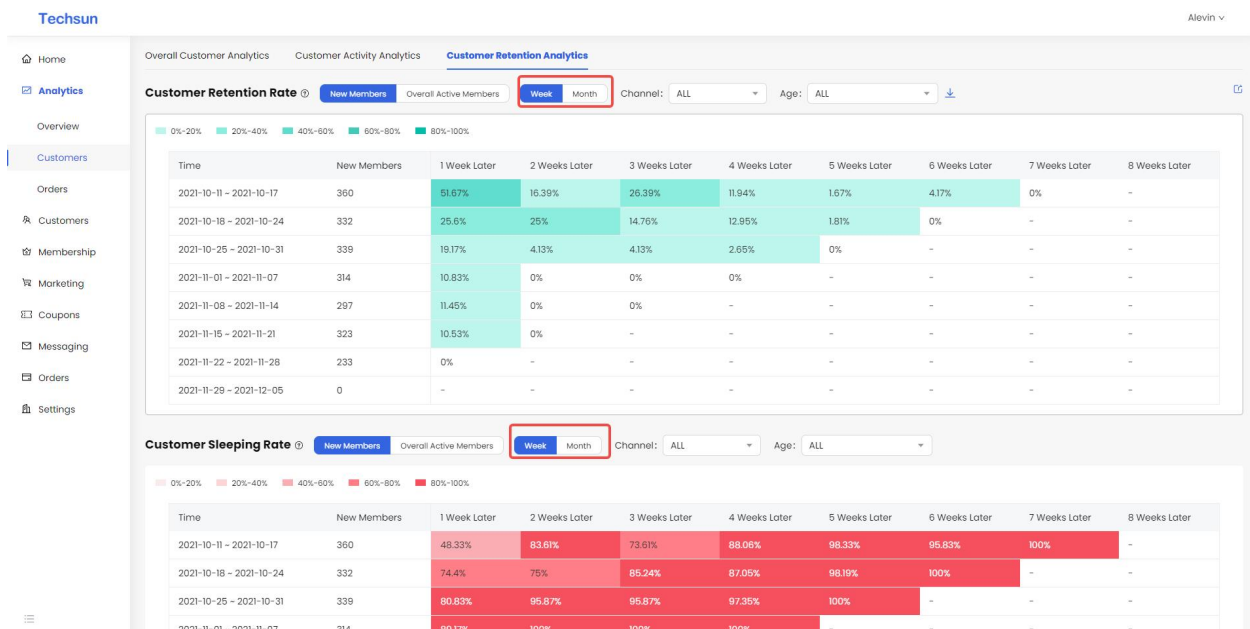
- 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

## ● User retention analysis

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

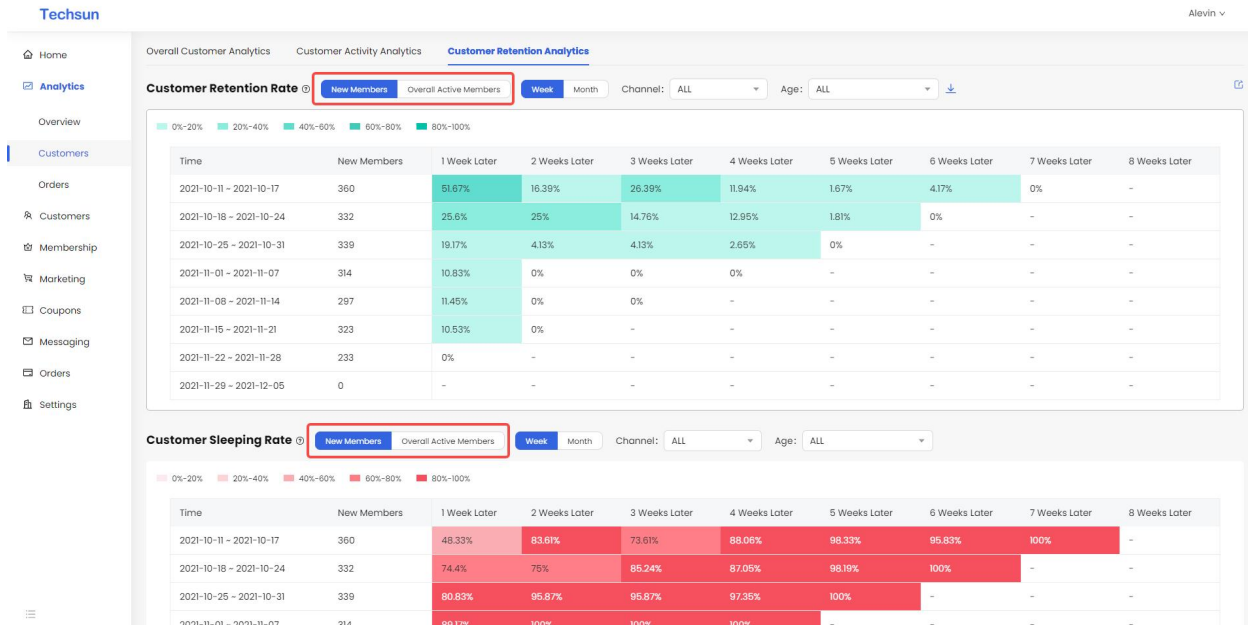


## Step 2: Click [Week], [Month] button to support week and month filtering

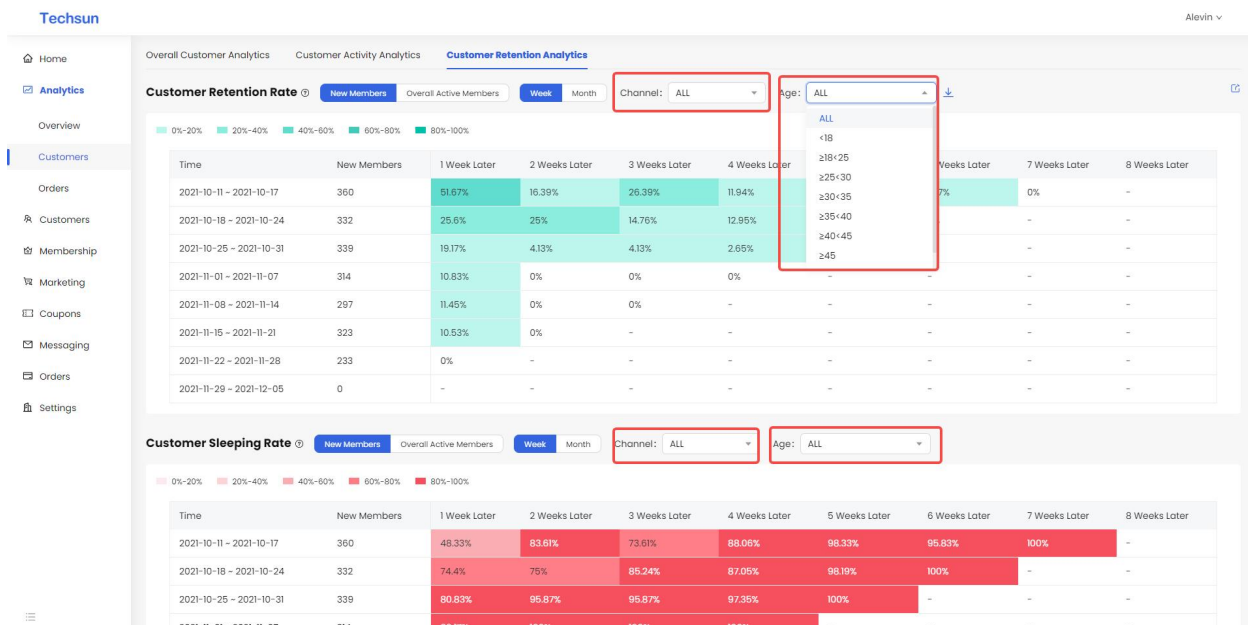


## Step 3: Click the [New Member], [Overall Active Member] button to support the screening of new members and overall active members

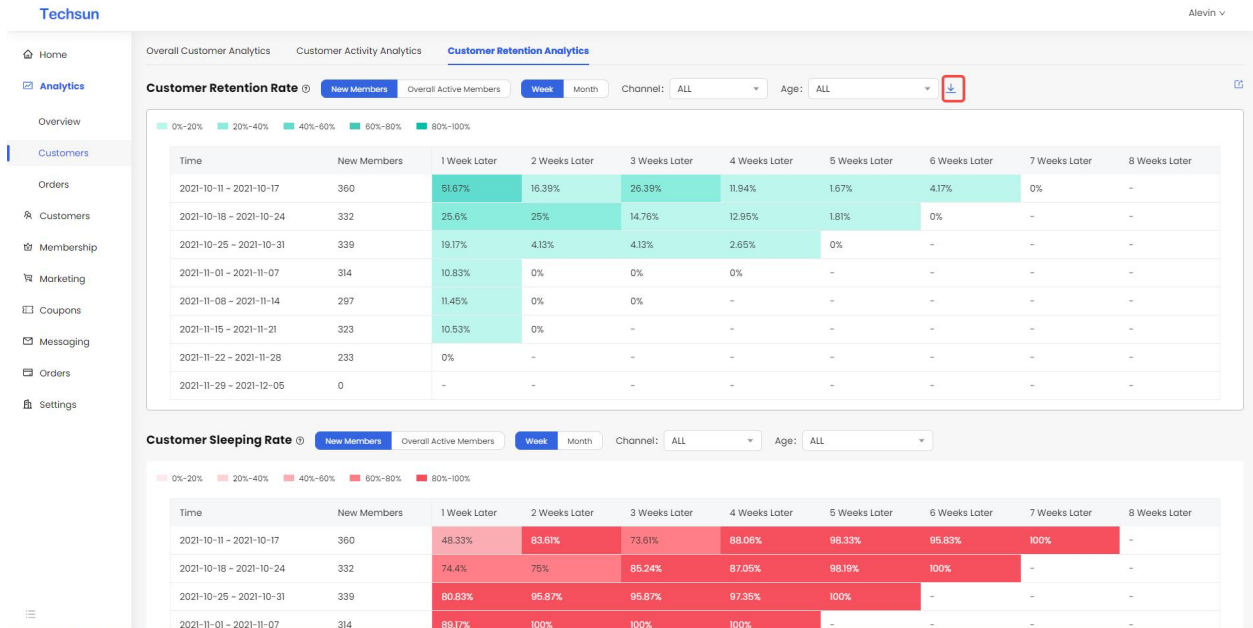




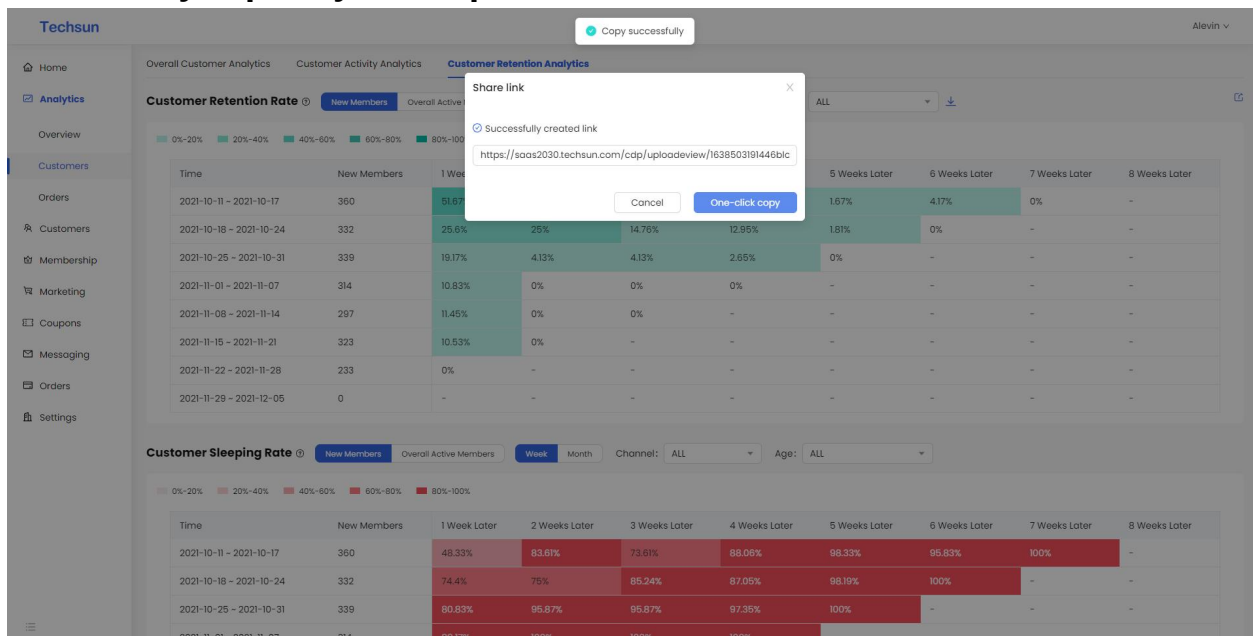
**Step 4: Click [Channel], [Age] filter box, support channel, age combination filter**

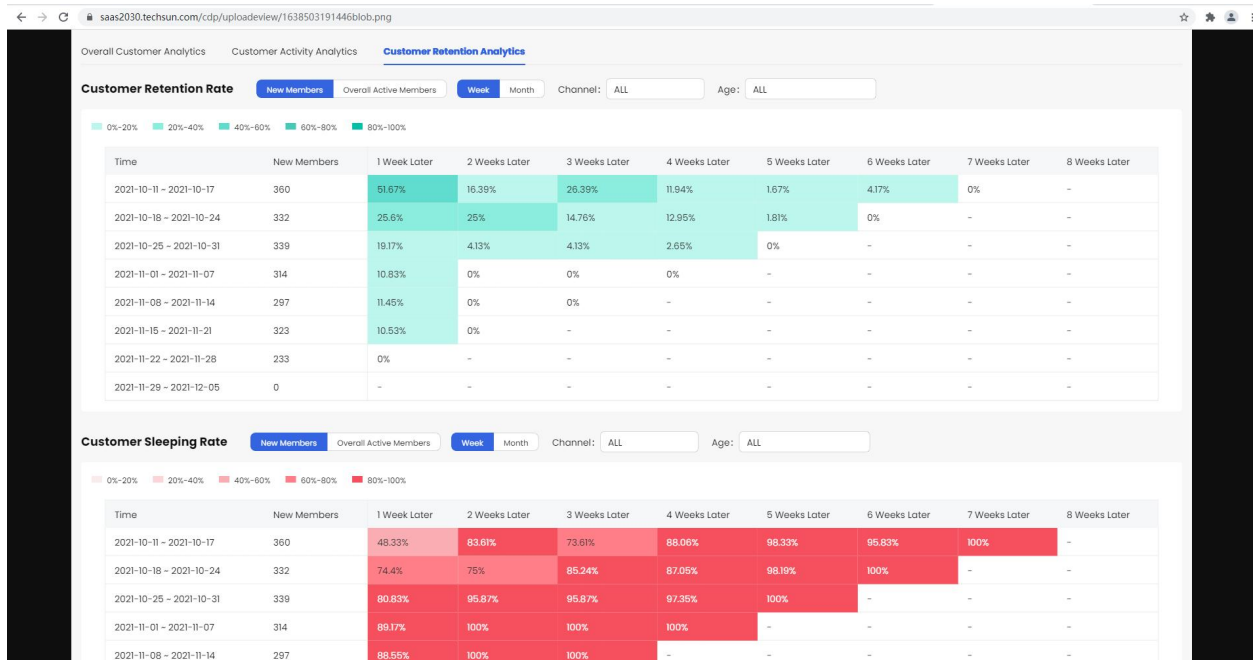


**Step 5: Click the [Download] button to support data download**



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





## Instruction Manual:

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

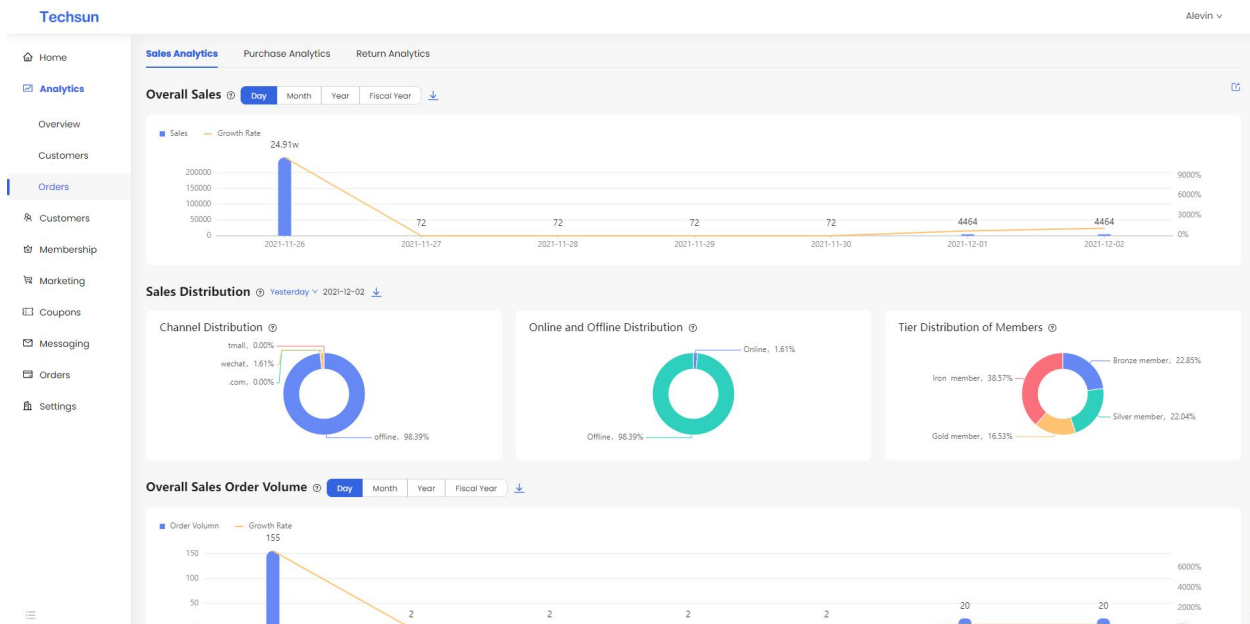
## ORDERS

### Function Description:

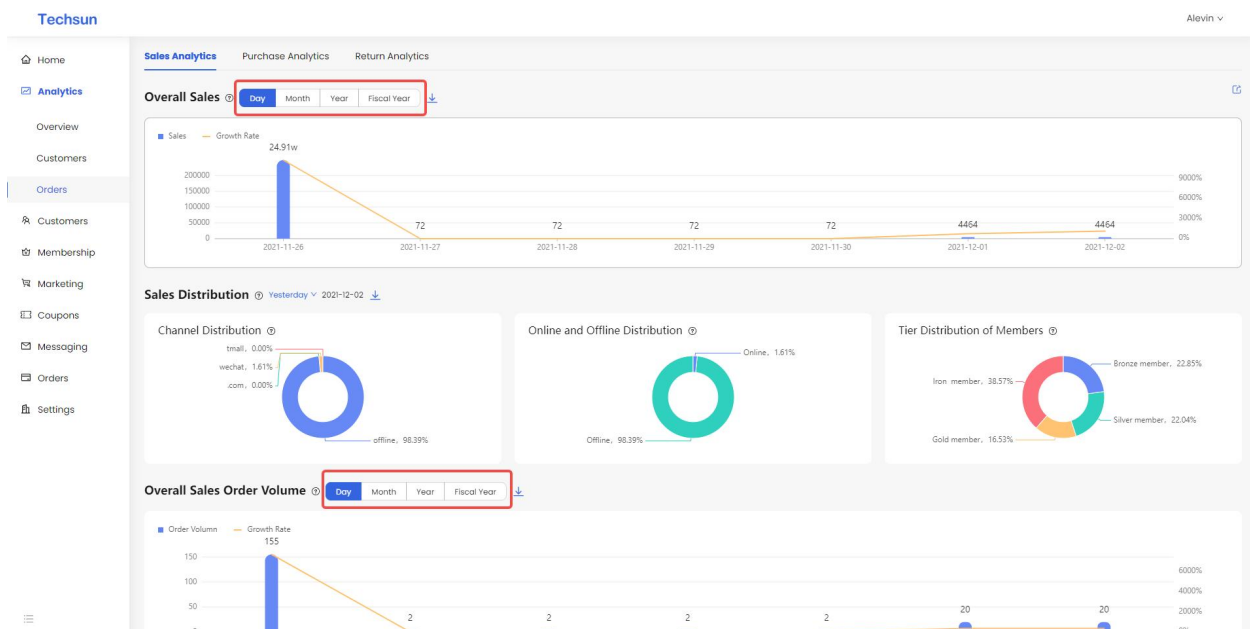
- 1) Orders display: Sales Analysis, Purchase Analysis, Return Analysis;
- 2) Sales analysis: display overall sales, sales distribution, overall sales order volume, sales order volume distribution;
- 3) Purchase analysis: display the distribution of member purchase times, member repurchase rate, and 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] → [Orders] → [Sales Analytics] to enter the sales analysis view interface**



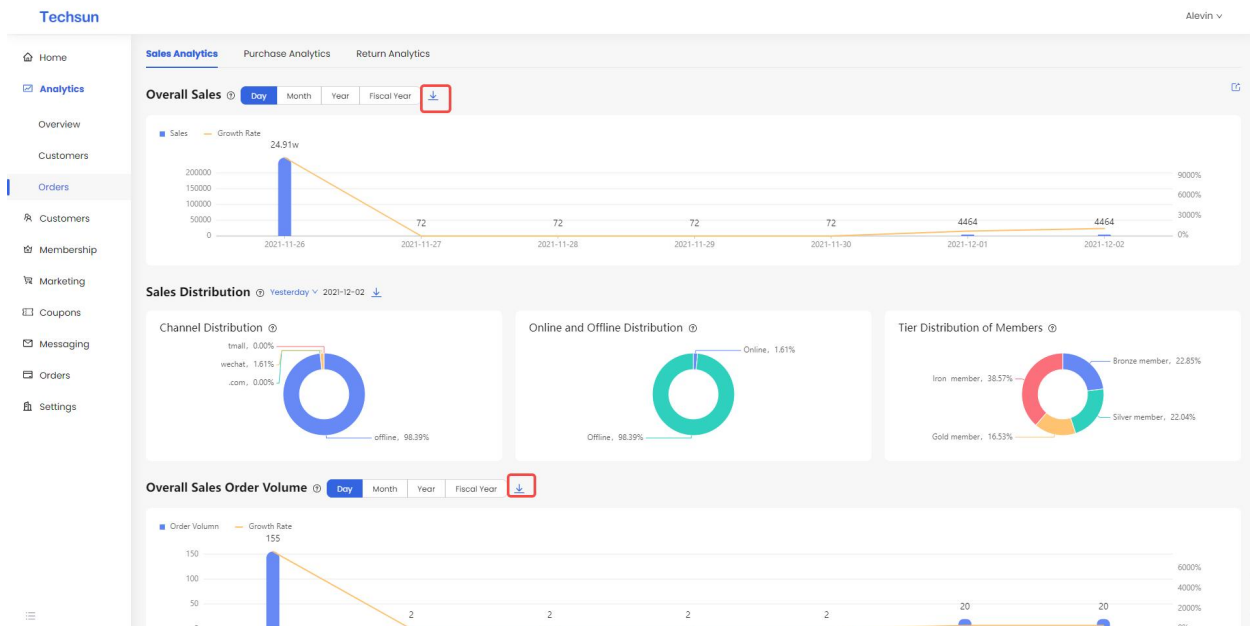
**Step 2: Click the [Day], [Month], [Year], [Fiscal Year] buttons to support day, month, year, and fiscal year filtering; click the [Yesterday] button to support date filtering**



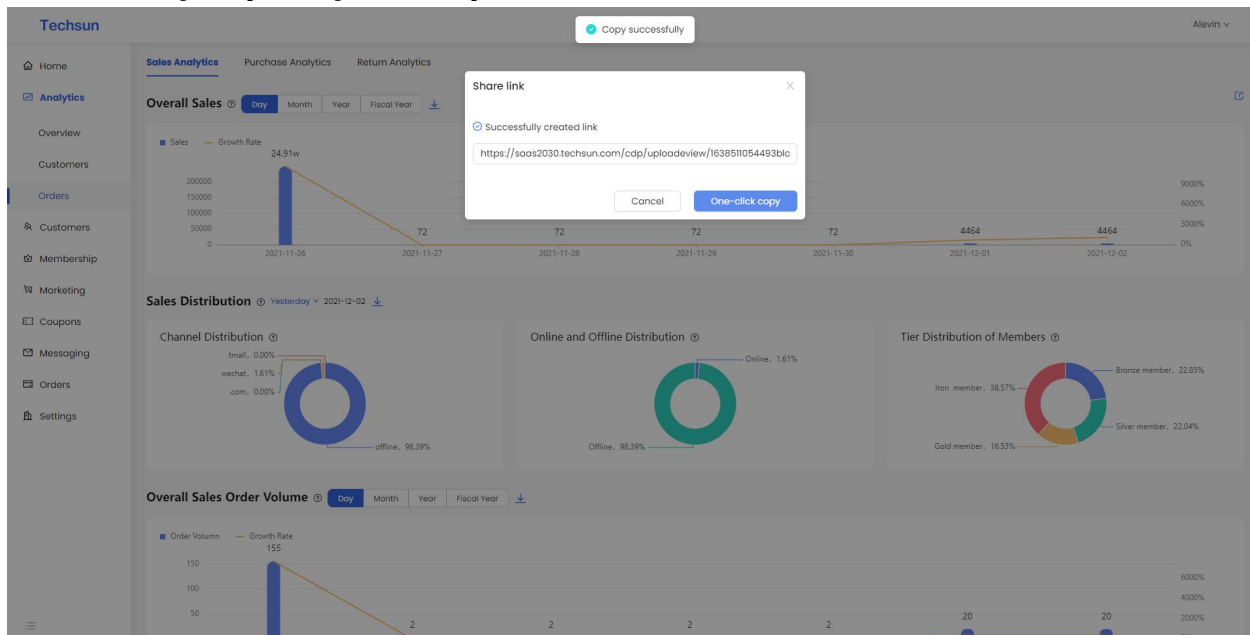
## Instruction Manual:

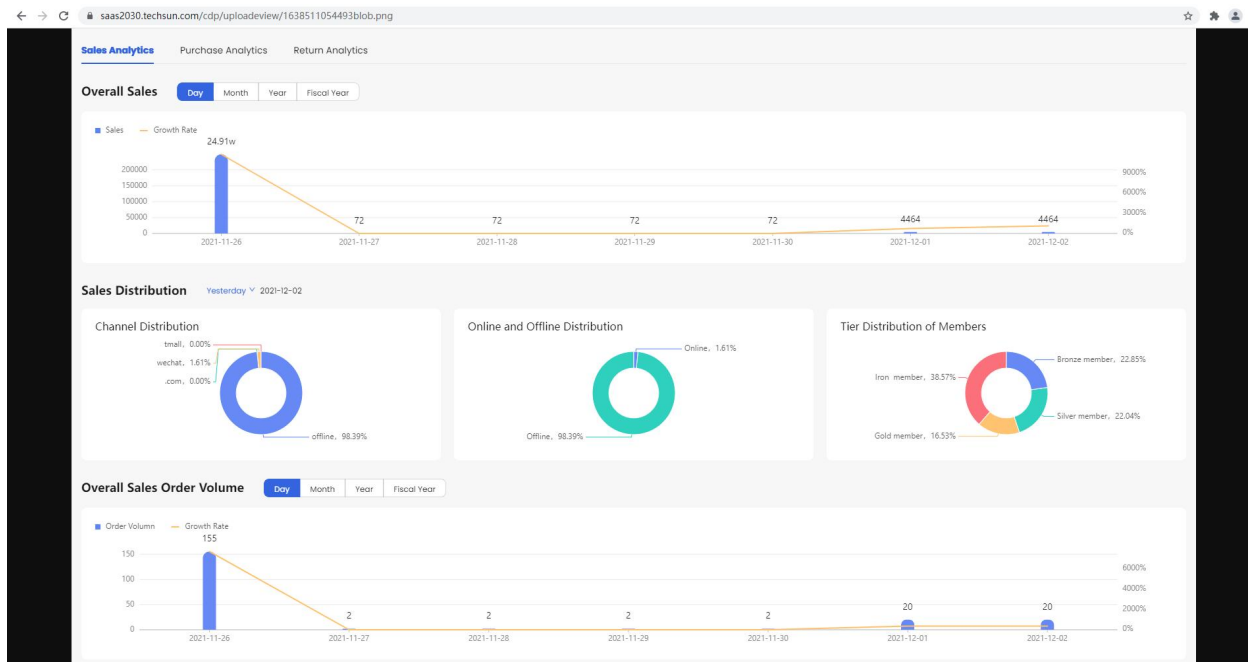
- 1) Date supports the screening of yesterday, the last 7 days, the last 30 days, the last 365 days, and this year;

## 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



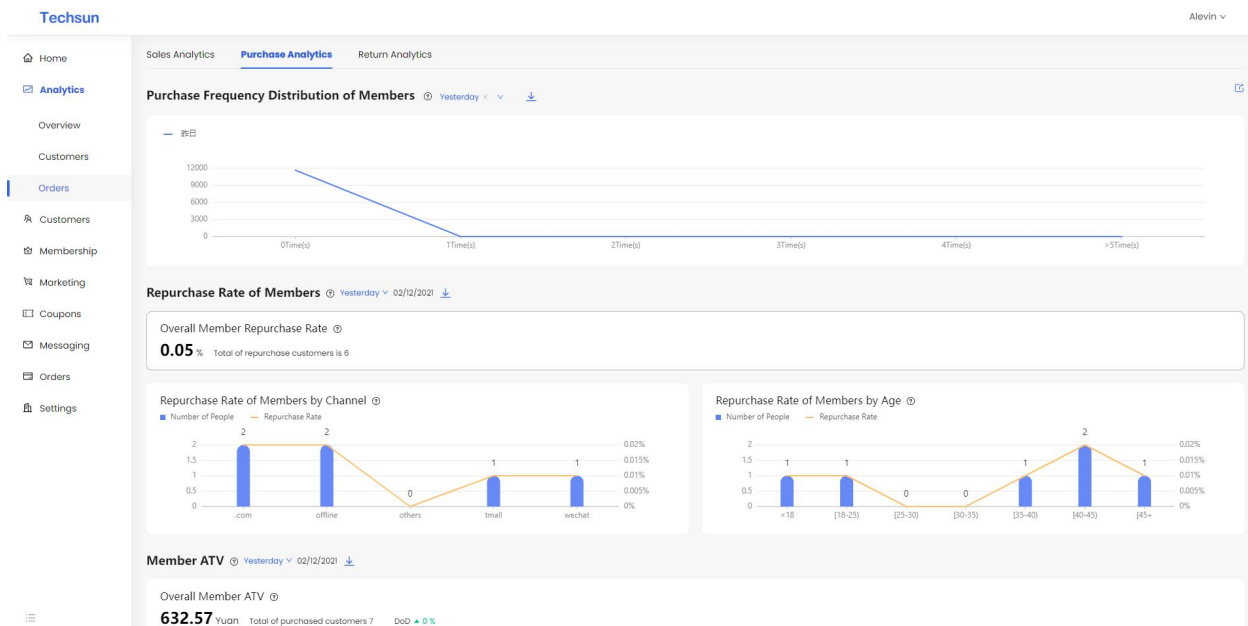


## Instruction Manual:

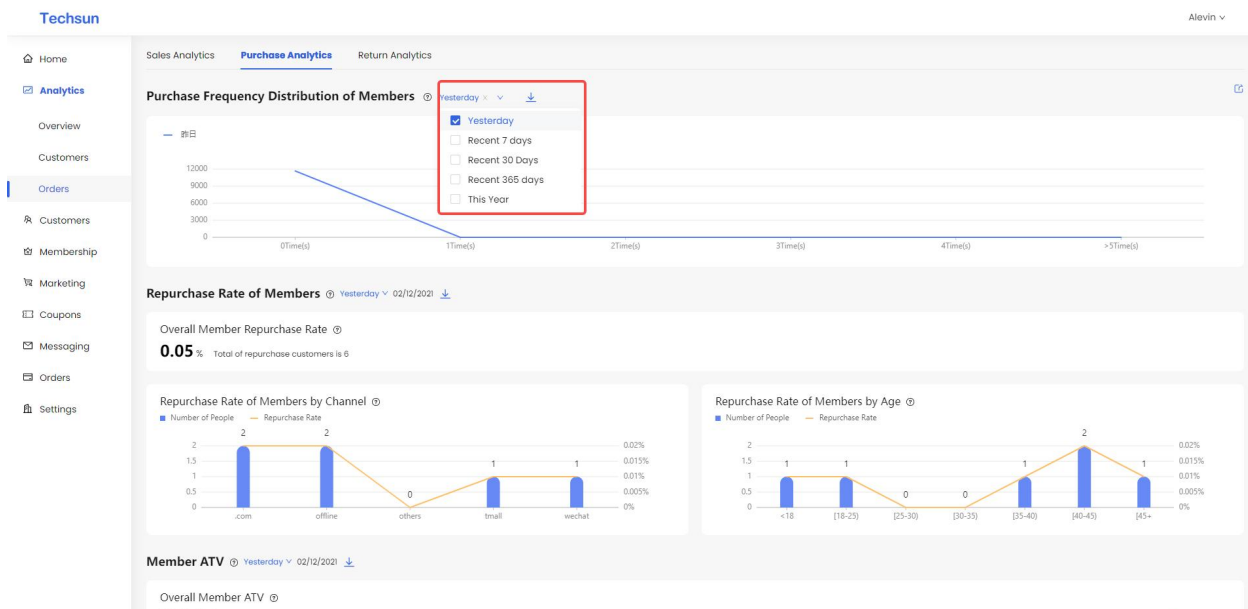
1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

## ● Purchase analysis

**Step 1: Select the menu bar [Analytics]→[Orders]→[Purchase Analytics] to enter the purchase analysis view interface**



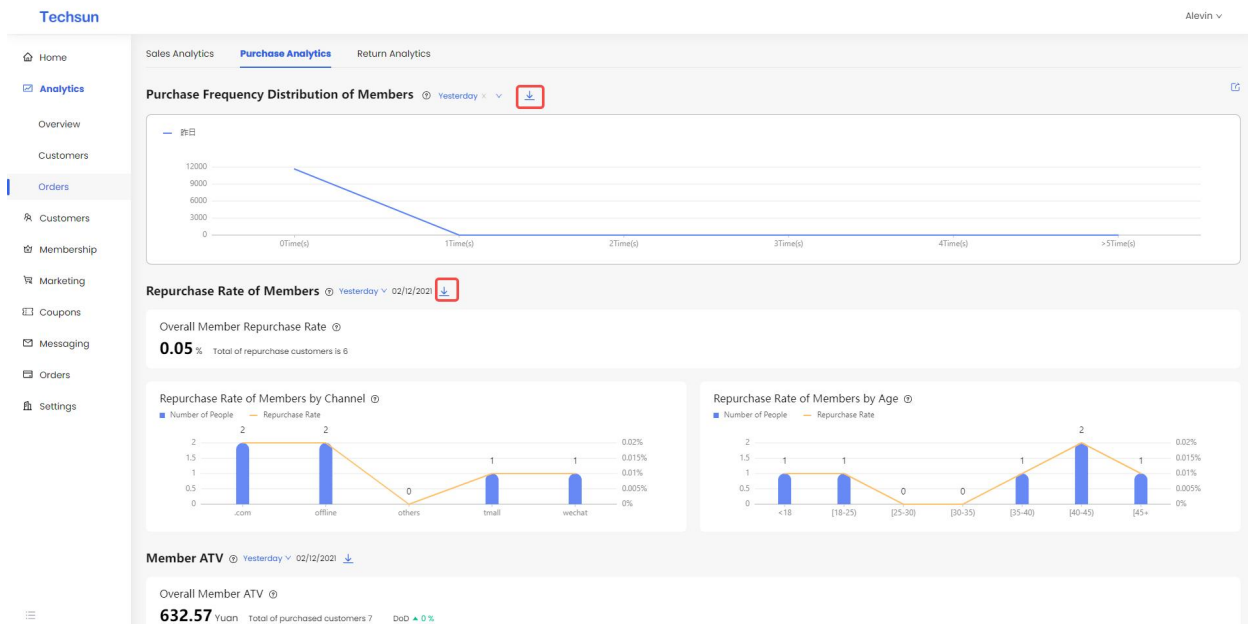
## Step 2: Click the [Yesterday] button to support date filtering



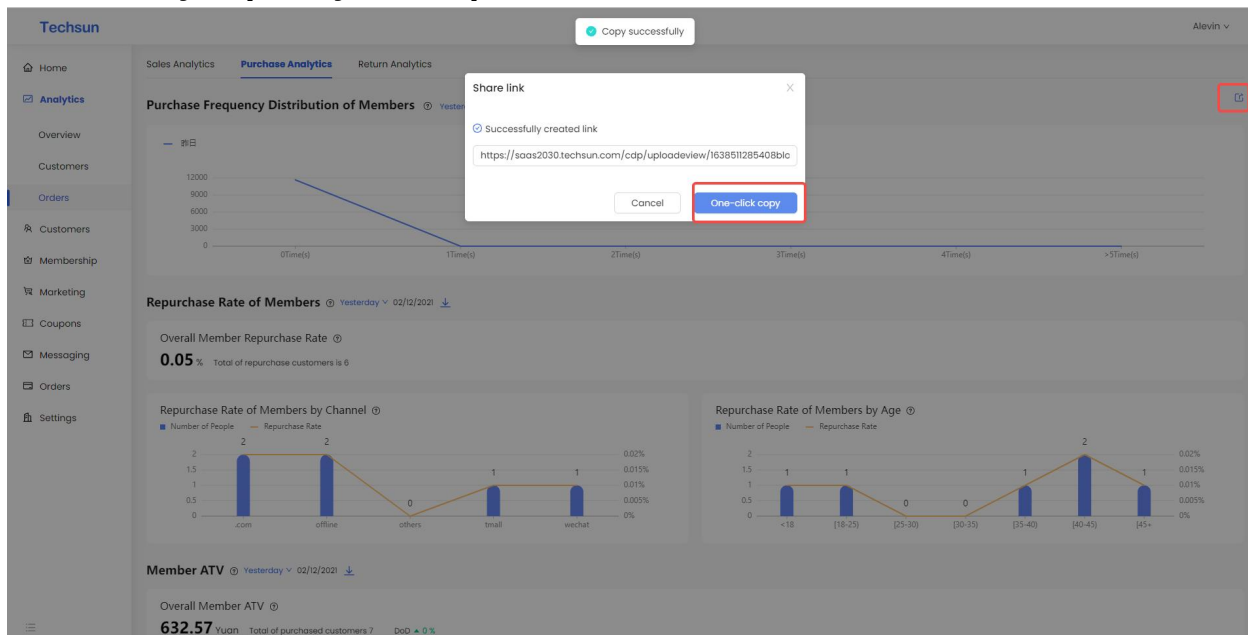
## Instruction Manual:

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

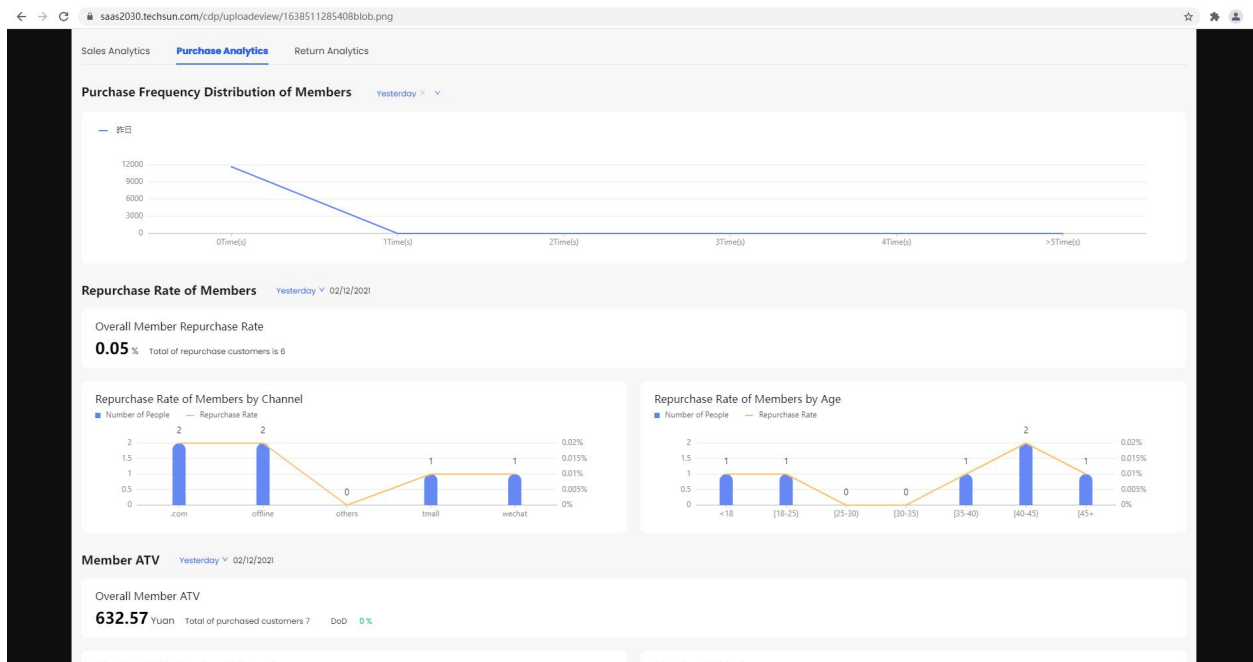
## Step 3: Click the [Download] button to support data download



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





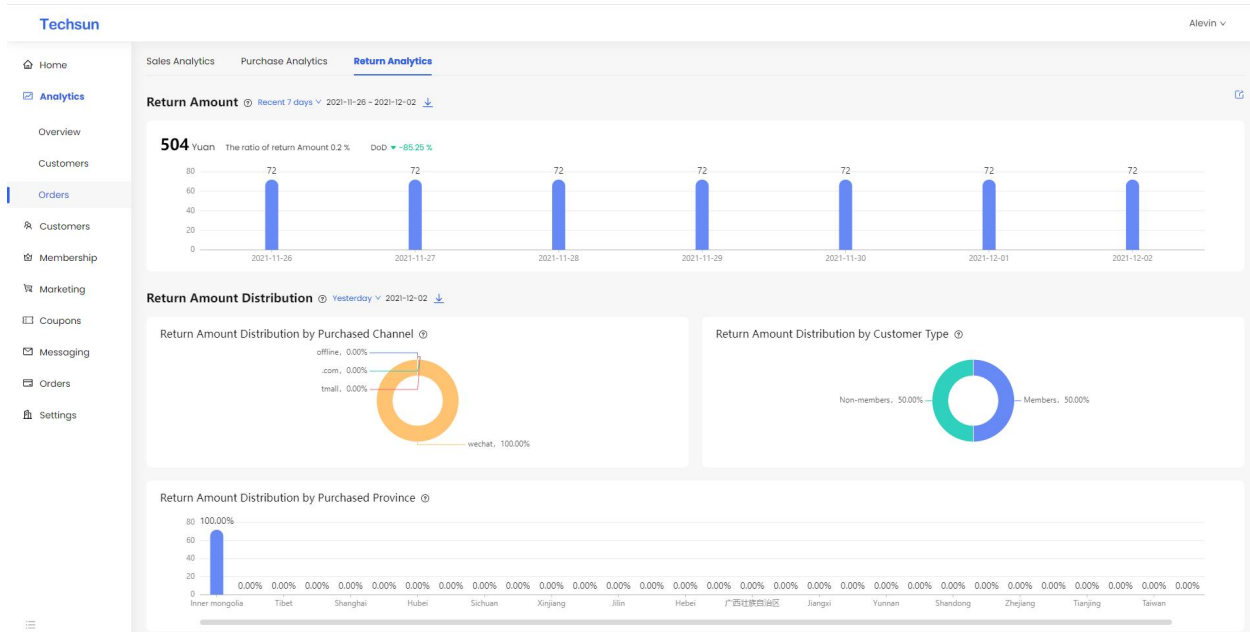


## Instruction Manual:

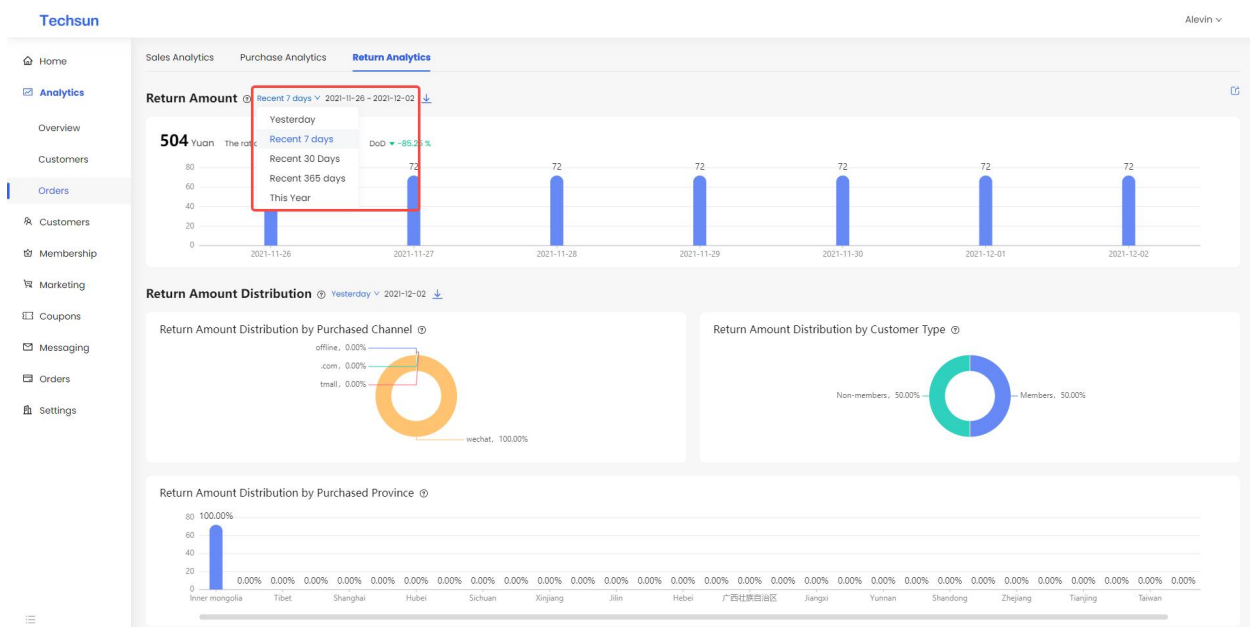
- 1) Support one-click copy or manual copy, after the link is successfully copied, you can share;

## ● Return analysis

**Step 1: Select the menu bar [Analytics]→[Orders]→[Return Analytics] to enter the return analysis view interface**



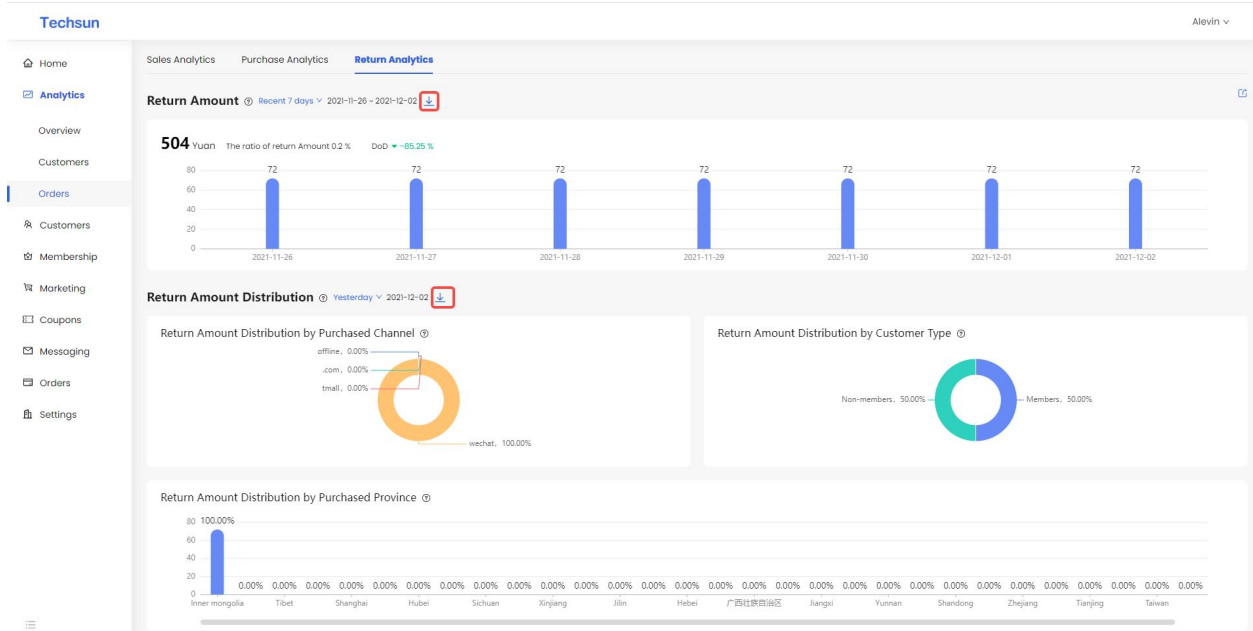
## Step 2: Click the [Yesterday] button to support date filtering



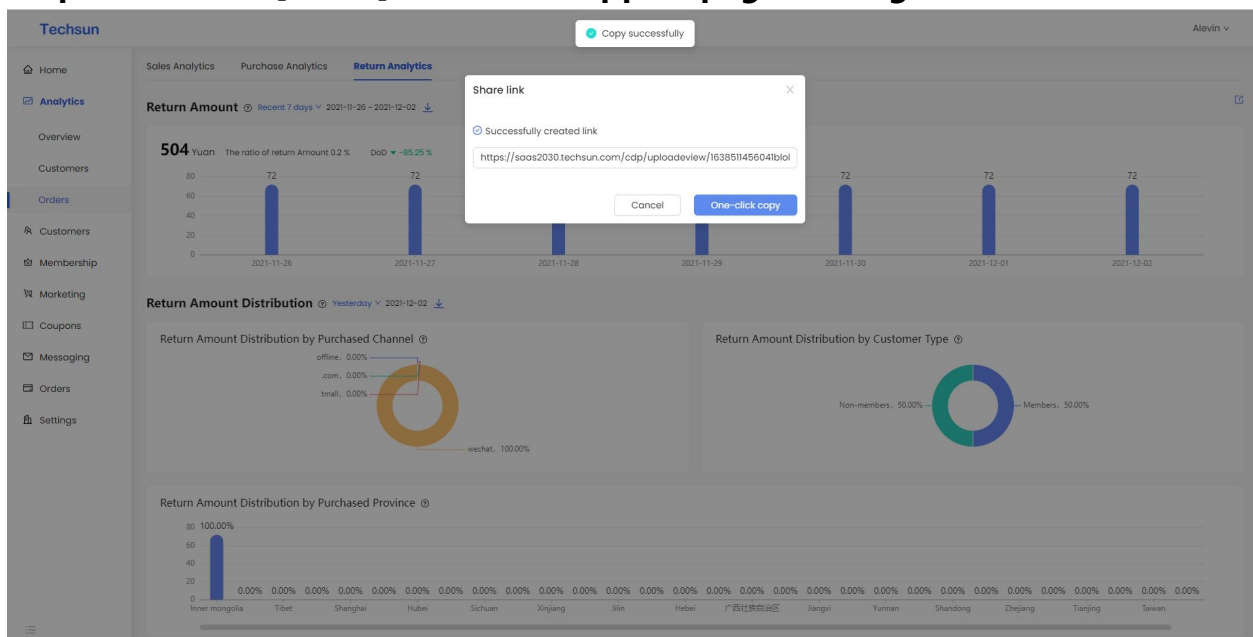
## Instruction Manual:

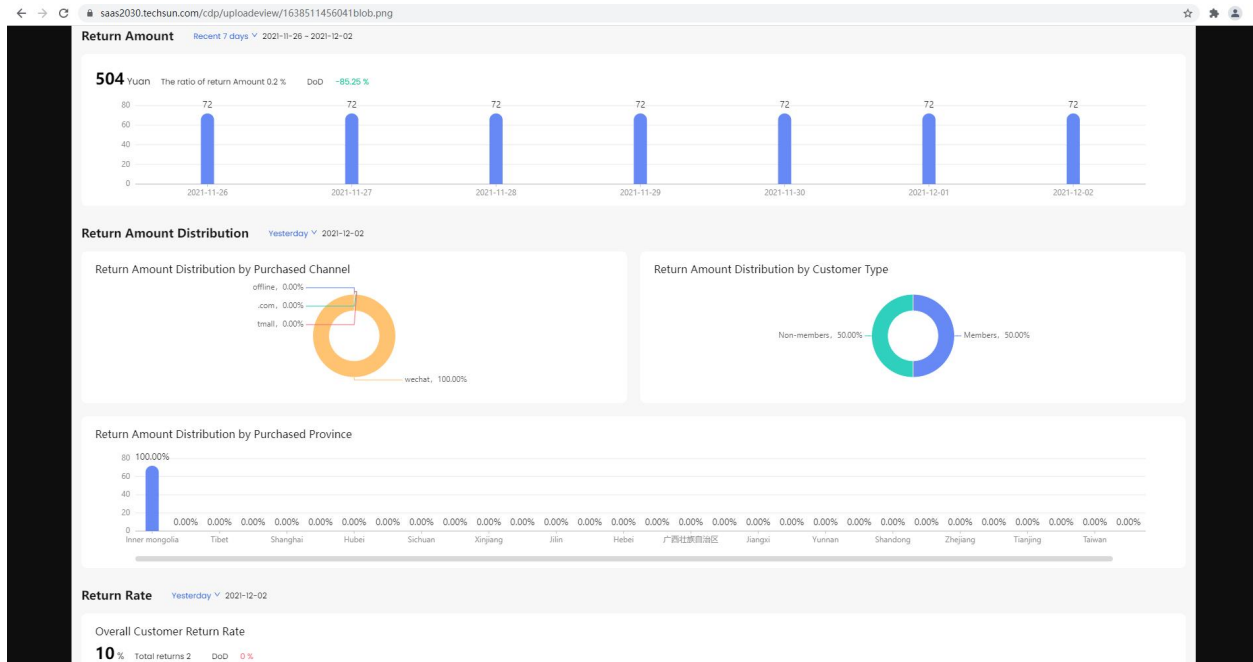
- 1) Date supports the screening of yesterday, the last 7 days, the last 30 days, the last 365 days, and this year;

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



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





## Instruction Manual:

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;
- 4) 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] → [Portraits] to enter the user Personas view interface

Techsun Alewin

Home Analytics **Customers** Portraits Segmentations Tags Metadatos Membership Marketing Coupons Messaging Orders Settings

Search by name, phone number

Customer Name	Customer Source	Gender	Birthday	Phone Number	Postal Code	Country/Region	Province/State	City	Creation Time	Operation
**h	Shopify	Male	**/**/1992	+65 ****0260		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**g	JD Flagship Shop	Female	**/**/1992	+65 ****0249		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**m	Shopify	Male	**/**/1992	+65 ****0248		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**s	NEWPOS	Male	**/**/1992	+65 ****0247		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**f	Shopify	Male	**/**/1992	+65 ****0246		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**k	NEWPOS	Female	**/**/1992	+65 ****0245		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**h	NEWPOS	Female	**/**/1992	+65 ****0244		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**j	JD Flagship Shop	Male	**/**/1992	+65 ****0243		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**s	Shopify	Male	**/**/1992	+65 ****0242		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**m	Shopify	Female	**/**/1992	+65 ****0241		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**j	JD Flagship Shop	Male	**/**/1992	+65 ****0240		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait

Total 258 piece(s) of 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

**Techsun** Alevin v

Home Analytics **Customers**

Portraits

Segmentations Tags Metadata Membership Marketing Coupons Messaging Orders Settings

Search by name, phone number

Customer Name	Customer Source	Gender	Birthday	Phone Number	Postal Code	Country/Region	Province/State	City	Creation Time	Operation
**h	Shopify	Male	**/**/1992	+65 ****0250		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**g	JD Flagship Shop	Female	**/**/1992	+65 ****0249		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**m	Shopify	Male	**/**/1992	+65 ****0248		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**s	NEWPOS	Male	**/**/1992	+65 ****0247		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**r	Shopify	Male	**/**/1992	+65 ****0246		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**k	NEWPOS	Female	**/**/1992	+65 ****0245		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**h	NEWPOS	Female	**/**/1992	+65 ****0244		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**j	JD Flagship Shop	Male	**/**/1992	+65 ****0243		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**s	Shopify	Male	**/**/1992	+65 ****0242		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**m	Shopify	Female	**/**/1992	+65 ****0241		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait
**i	JD Flagship Shop	Male	**/**/1992	+65 ****0240		Singapore		Singapore	05/11/2021 3:53 PM	Info Portrait

Total 258 piece(s) of data < 1 2 3 4 5 6 7 8 9 > 30 / page Go to

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**Techsun** Alevin v

Home Analytics **Customers**

Portraits

Segmentations Tags Metadata Membership Marketing Coupons Messaging Orders Settings

Home > Customers > Portraits > Portrait Details



Ben Moore

Delete PI

No Data Available

No Data Available

No Data Available

No Data Available

84 Total Money Purchased

84 Average Transaction Value

2 Total Products Purchased

Guess he/she likes

Cafe 44.5%

Burgers 33.3%

Candy 22.2%

Customer Tags

less than 100 years: less than 100 years

Card member: Card member

once: once

this year: this year

Low-value users: Low-value users

Female: Female

more than 100 years: more than 100 years

Card member: Card member

once: once

this year: this year

Low-value users: Low-value users

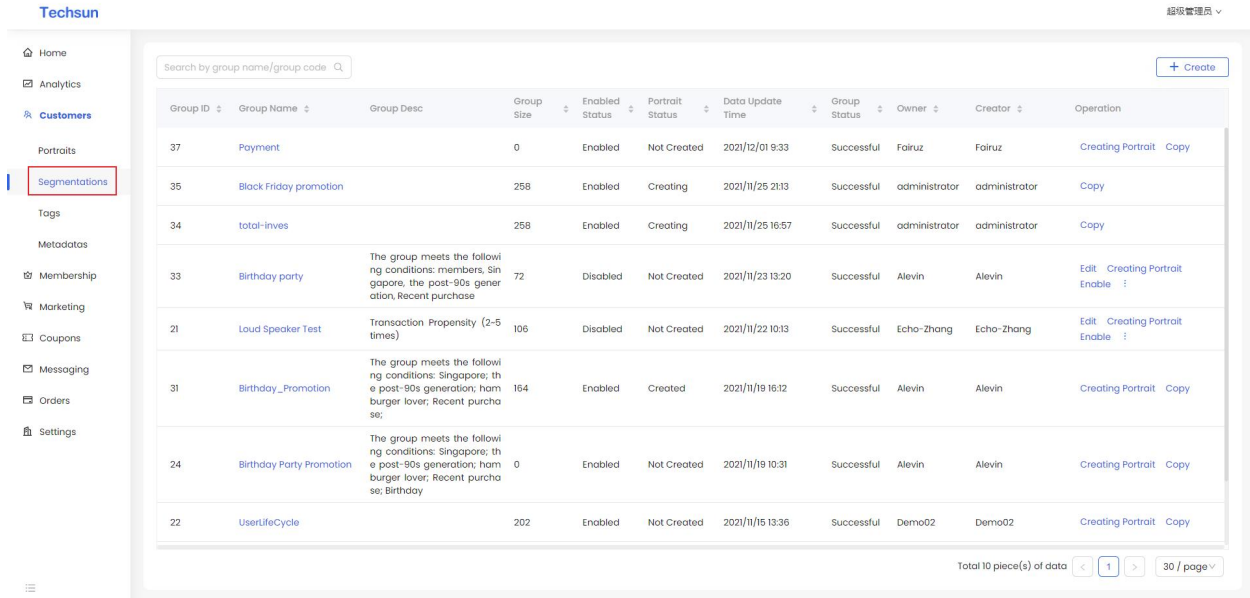
Female: Female

## SEGMENTATIONS

### Function Description:

- 1) 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.

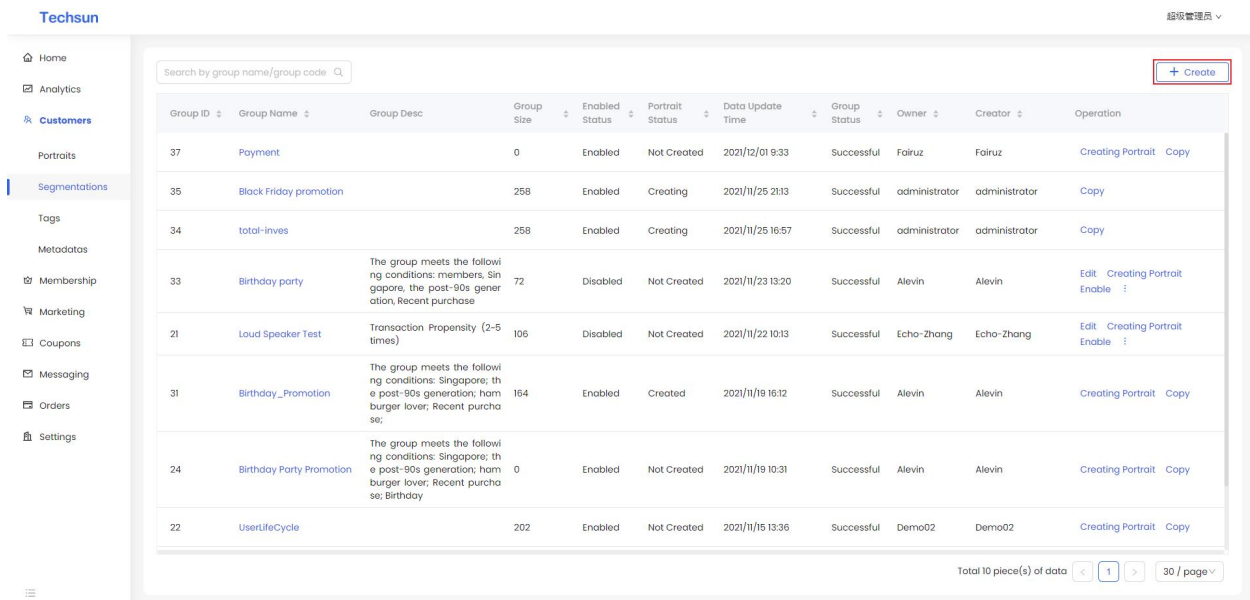
## Step 1: Select the menu bar[Customers] → [Segmentations] to enter the group management view interface



### Instruction Manual:

- 1) Support searching by group name;

## Step 2: Click the [Create] button



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

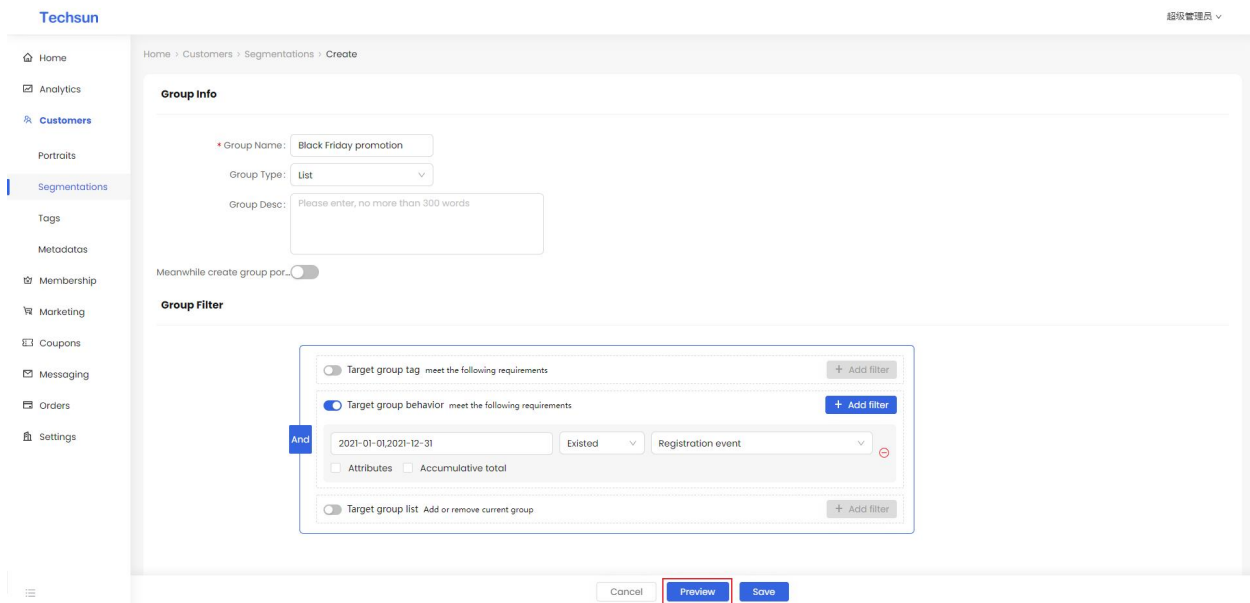
The screenshot displays the 'Create' interface for customer segmentation in Techsun Social Hub. The left sidebar contains navigation options: Home, Analytics, Customers, Portraits, Segmentations (selected), Tags, Metadatas, Membership, Marketing, Coupons, Messaging, Orders, and Settings. The main content area is titled 'Home > Customers > Segmentations > Create'. It includes a 'Group Info' section with fields for Group Name (Black Friday promotion), Group Type (List), and Group Desc. Below this is a 'Group Filter' section with a toggle for 'Meanwhile create group por...' and a filter rule configuration area. The filter rule is set to 'Target group behavior' with a date range of 2021-01-01 to 2021-12-31, 'Existed' status, and 'Registration event'. The 'Save' button is highlighted with a red box.

## Instruction Manual:

- 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;  
 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 ;
- According to the existing group list dimensions;



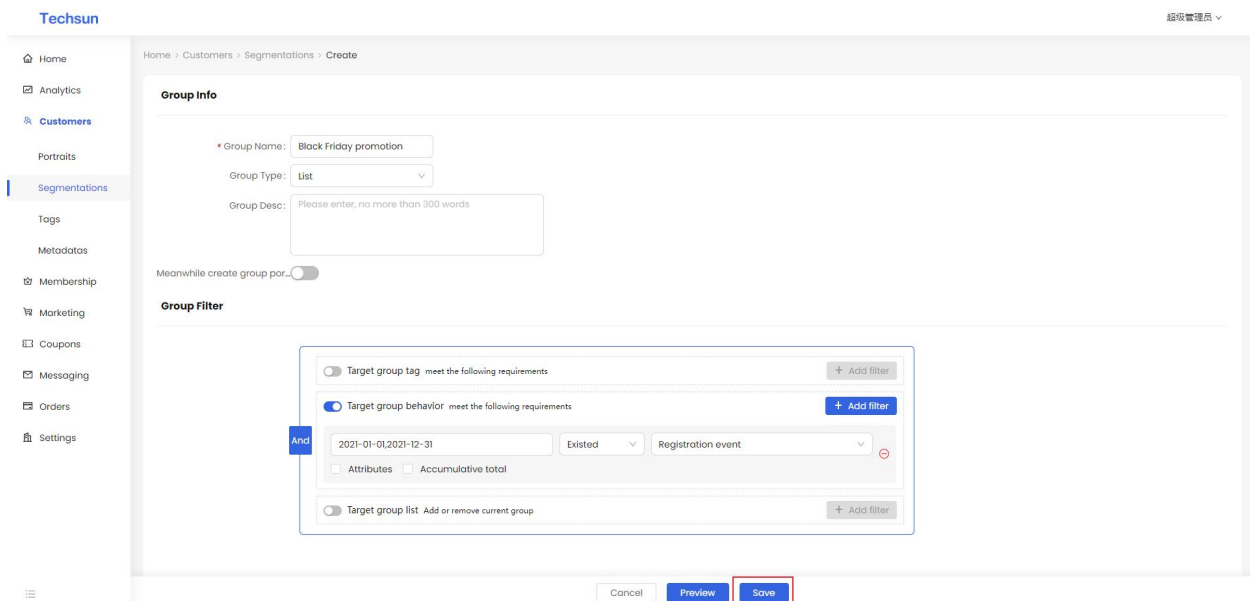
## Step 4: After entering specific information on the creation page, you can click Preview



### 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".



## Step 6: Complete the creation of the Segmentations

## Instruction Manual:

- 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;
- 3) 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;
- 4) 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 Segmentations;

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

Techsun 超级管理员

Home Analytics Customers

Portraits

**Segmentations**

Tags

Metadatos

Membership

Marketing

Coupons

Messaging

Orders

Settings

Search by group name/group code

+ Create

Group ID	Group Name	Group Desc	Group Size	Enabled Status	Portrait Status	Data Update Time	Group Status	Owner	Creator	Operation
37	Payment		0	Enabled	Not Created	2021/12/01 9:33	Successful	Fairuz	Fairuz	Creating Portrait Copy
35	Black Friday promotion		258	Enabled	Creating	2021/11/25 21:13	Successful	administrator	administrator	Copy
34	total-inves		258	Enabled	Creating	2021/11/25 16:57	Successful	administrator	administrator	Copy
33	Birthday party	The group meets the following conditions: members, Singapore, the post-90s generation, Recent purchase	72	Disabled	Not Created	2021/11/23 13:20	Successful	Alevin	Alevin	Edit Creating Portrait Enable
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 following conditions: Singapore; the post-90s generation; ham burger lover; Recent purchase;	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	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

Total 10 piece(s) of data 1 30 / page

- 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 超级管理员 ▾

Home Analytics **Customers** Portraits **Segmentations** Tags Metadatos Membership Marketing Coupons Messaging Orders Settings

Search by group name/group code 🔍 + Create

Group ID	Group Name	Group Desc	Group Size	Enabled Status	Portrait Status	Data Update Time	Group Status	Owner	Creator	Operation
37	Payment		0	Enabled	Not Created	2021/12/01 9:33	Successful	Fairuz	Fairuz	Creating Portrait Copy
35	Black Friday promotion		258	Enabled	Creating	2021/11/25 21:13	Successful	administrator	administrator	Copy
34	total-inves		258	Enabled	Creating	2021/11/25 16:57	Successful	administrator	administrator	Copy
33	Birthday party	The group meets the following conditions: members, Singapore, the post-90s generation, Recent purchase	72	Disabled	Not Created	2021/11/23 13:20	Successful	Alevin	Alevin	Edit Enable <b>Creating Portrait</b>
21	Loud Speaker Test	Transaction Propensity (2-5 times)	106	Disabled	Not Created	2021/11/22 10:13	Successful	Echo-Zhang	Echo-Zhang	Edit Enable Creating Portrait
31	Birthday_Promotion	The group meets the following conditions: Singapore; the post-90s generation; ham burger lover; Recent purchase;	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	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

Total 10 piece(s) of data < 1 > 30 / page ▾

- 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 ▾

Home Analytics **Customers** Portraits **Segmentations** Tags Metadatos Membership Marketing Coupons Messaging Orders Settings

Search by group name/group code 🔍 + Create

Group ID	Group Name	Group Desc	Group Size	Enabled Status	Portrait Status	Data Update Time	Group Status	Owner	Creator	Operation
37	Payment		0	Enabled	Not Created	2021/12/01 9:33	Successful	Fairuz	Fairuz	Creating Portrait Copy
35	Black Friday promotion		258	Enabled	Creating	2021/11/25 21:13	Successful	administrator	administrator	Copy
34	total-inves		258	Enabled	Creating	2021/11/25 16:57	Successful	administrator	administrator	Copy
33	Birthday party	The group meets the following conditions: members, Singapore, the post-90s generation, Recent purchase	72	Disabled	Not Created	2021/11/23 13:20	Successful	Alevin	Alevin	Edit Enable 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 Enable Creating Portrait
31	Birthday_Promotion	The group meets the following conditions: Singapore; the post-90s generation; ham burger lover; Recent purchase;	164	Enabled	Created	2021/11/19 16:12	Successful	Alevin	Alevin	Creating Portrait <b>Copy</b>
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	Alevin	Creating Portrait Copy
22	UserLifeCycle		202	Enabled	Not Created	2021/11/15 13:36	Successful	Demo02	Demo02	Creating Portrait Copy

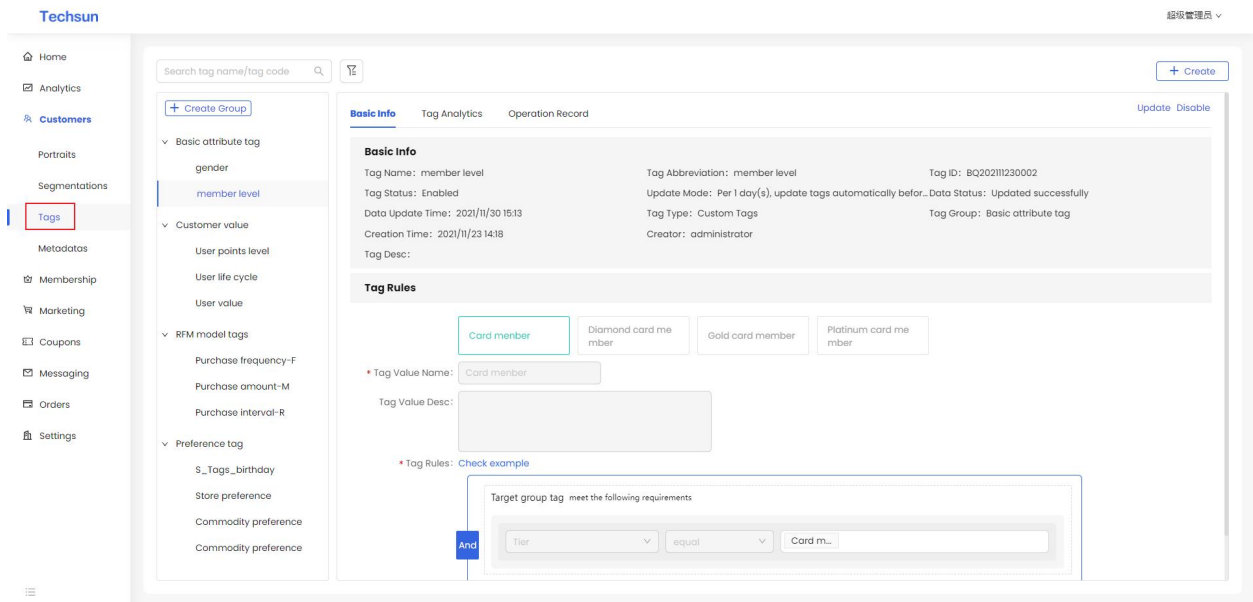
Total 10 piece(s) of data < 1 > 30 / page ▾

## 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.

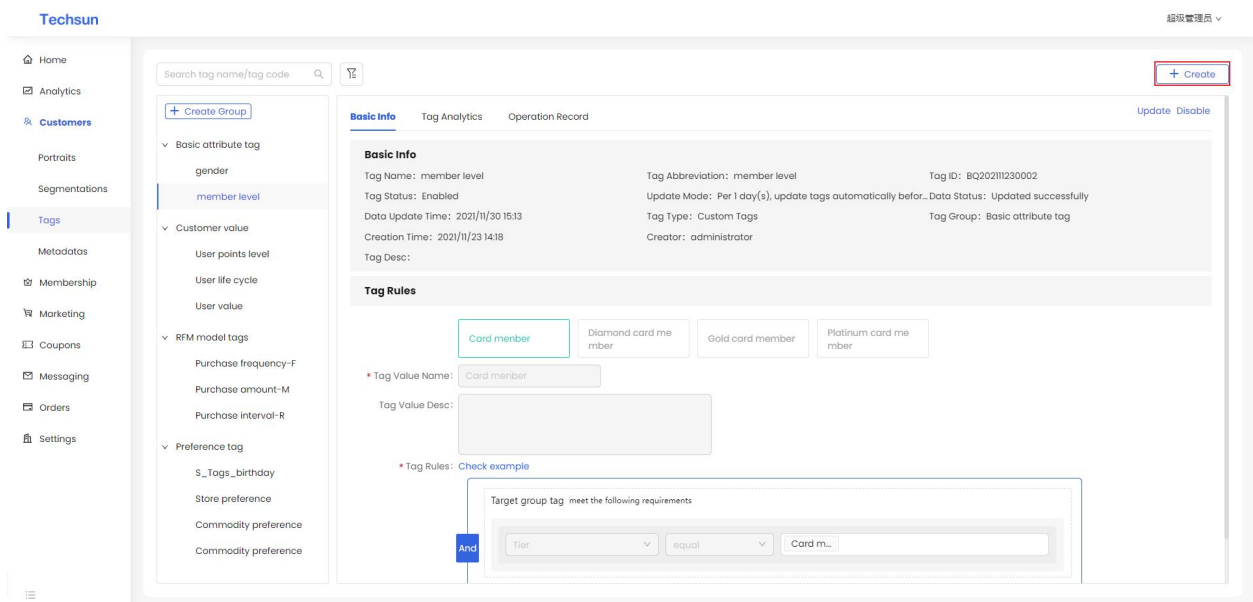
**Step 1: Select the menu bar [Customers] → [Tags] to enter the label definition interface**



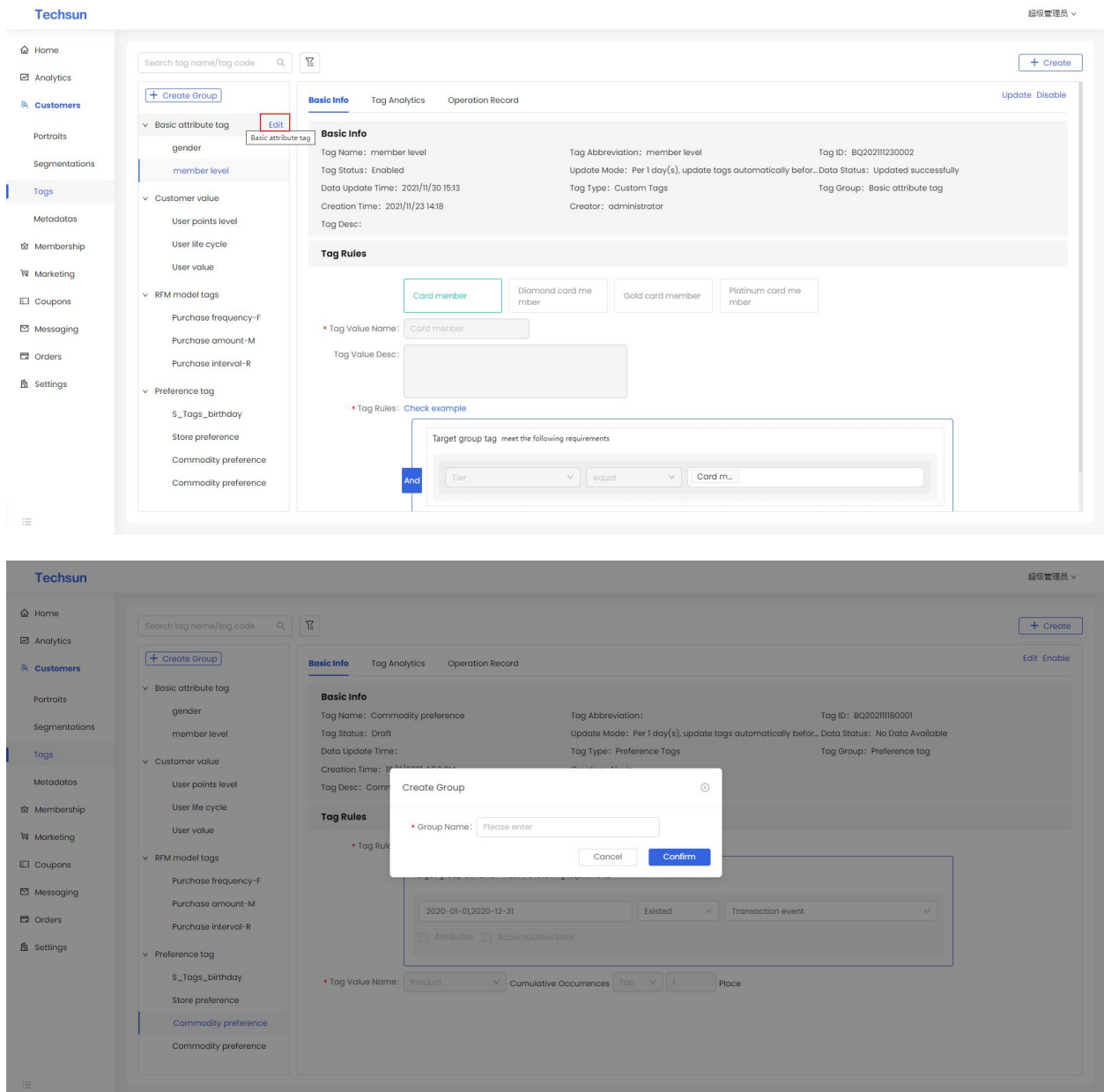
Remark:

- 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.

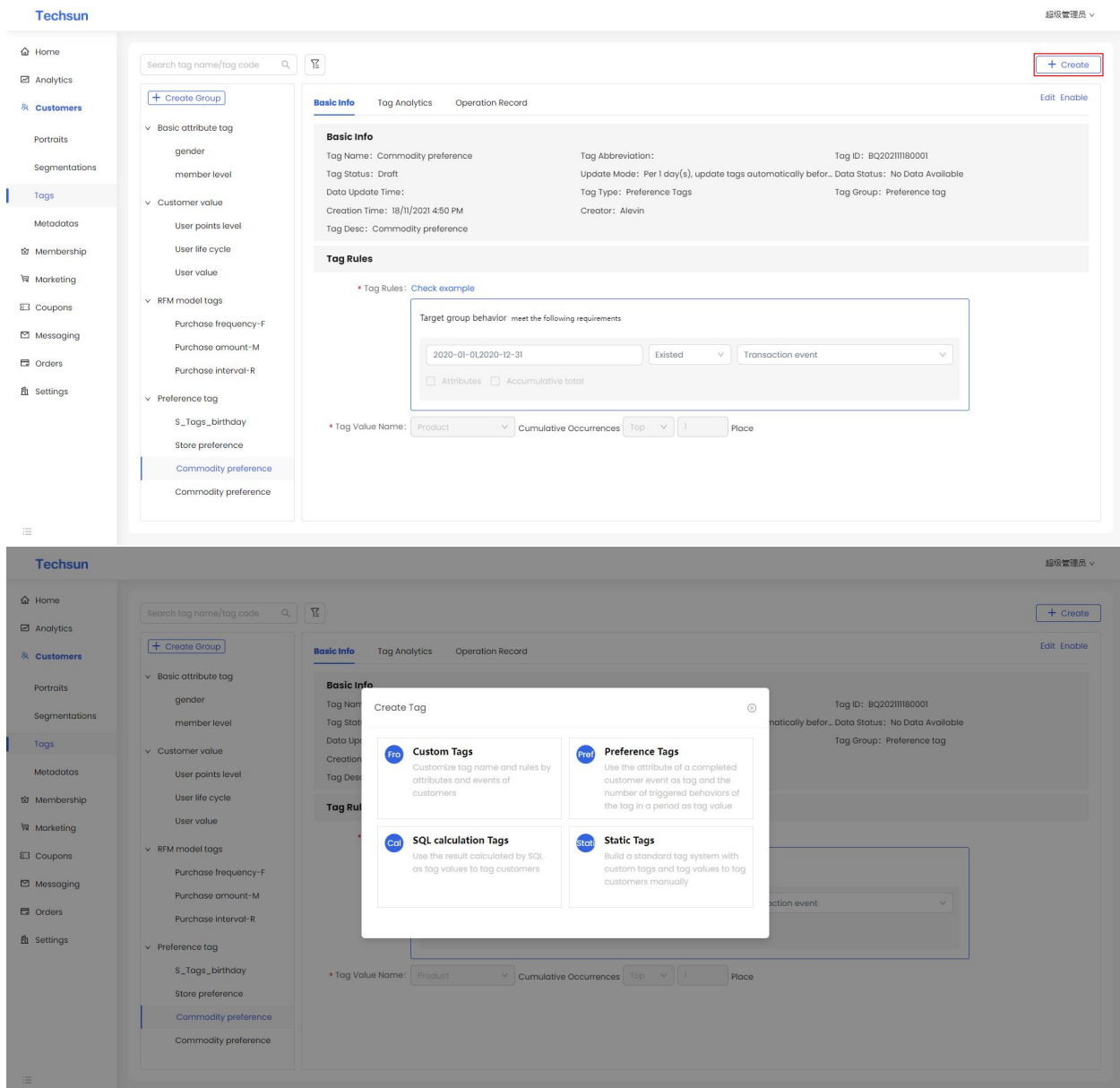
## Step 2: Click the [Create] label group button



## Step 3: Click the [Edit] label grouping button



## 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

Home > Customers > Tags > CreateCustom Tags

**Basic Info**

\* Tag Name:

Tag Abbreviation:

\* Tag Group:

\* Update Mode: ☒ Auto update ☐ Manual update

Per  day(s), update tags automatically before dawn

Tag Desc:

**Tag Rules**

Reminder: A maximum of 10 tag values can be added to a tag

\* Tag Value Name:

Tag Value Desc:

\* Tag Value Desc:

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



Home > Customers > Tags > CreatePreference Tags

**Basic Info**

\* Tag Name:

Tag Abbreviation:

\* Tag Group:

\* Update Mode: ☒ Auto update ☐ Manual update

Per  day(s), update tags automatically before dawn

Tag Desc:

**Tag Rules**

\* Tag Rules: [Check example](#)

☐ Target group behavior meet the following requirements

\* Tag Value Name:  Cumulative Occurrences  Place

Cancel Save

Remark:

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

## Static label

Home > Customers > Tags > CreateStatic Tags

**Basic Info**

\* Tag Name:

Tag Abbreviation:

\* Tag Group:

Tag Desc:

**Tag Rules**

Tag Value:

Add tag value

Reminder: A maximum of 10 tag values can be added to a tag

\* Tag Value Name:

Tag Value Desc:

Cancel Save

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

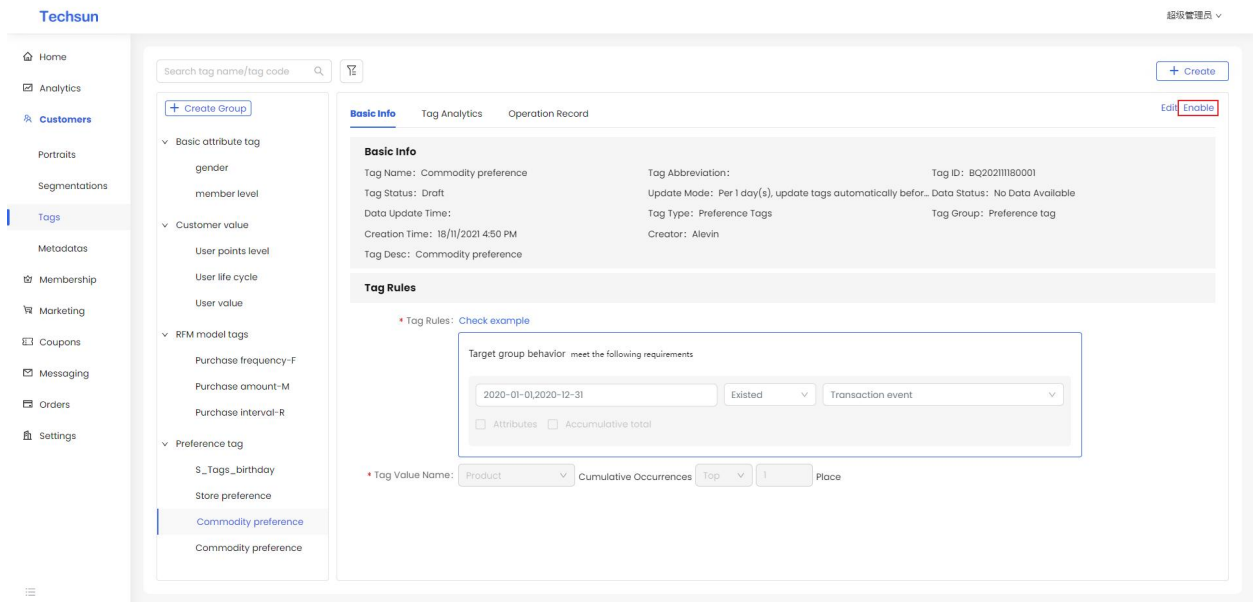
## SQL tags

The screenshot shows the 'CreateSQL calculation Tags' page in the Techsun Social Hub. The left sidebar contains navigation links: Home, Analytics, Customers, Portraits, Segmentations, Tags (selected), Metadatos, Membership, Marketing, Coupons, Messaging, Orders, and Settings. The main content area is titled 'Home > Customers > Tags > CreateSQL calculation Tags'. It features two main sections: 'Basic Info' and 'Tag Rules'. In 'Basic Info', there are input fields for 'Tag Name', 'Tag Abbreviation', and 'Tag Group', along with 'Update Mode' (radio buttons for 'Auto update' and 'Manual update'), 'Per' (input field with '1'), and 'Tag Desc'. In 'Tag Rules', there is a 'Data Type' dropdown (with 'Text' selected) and a 'Statistics SQL' field containing a SQL query snippet. A dropdown menu is open next to the SQL field, showing a list of fields and tables including 'customer\_id', 'tag\_value', 'event\_time', and 'Membership store (first\_store)'.

Remark:

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

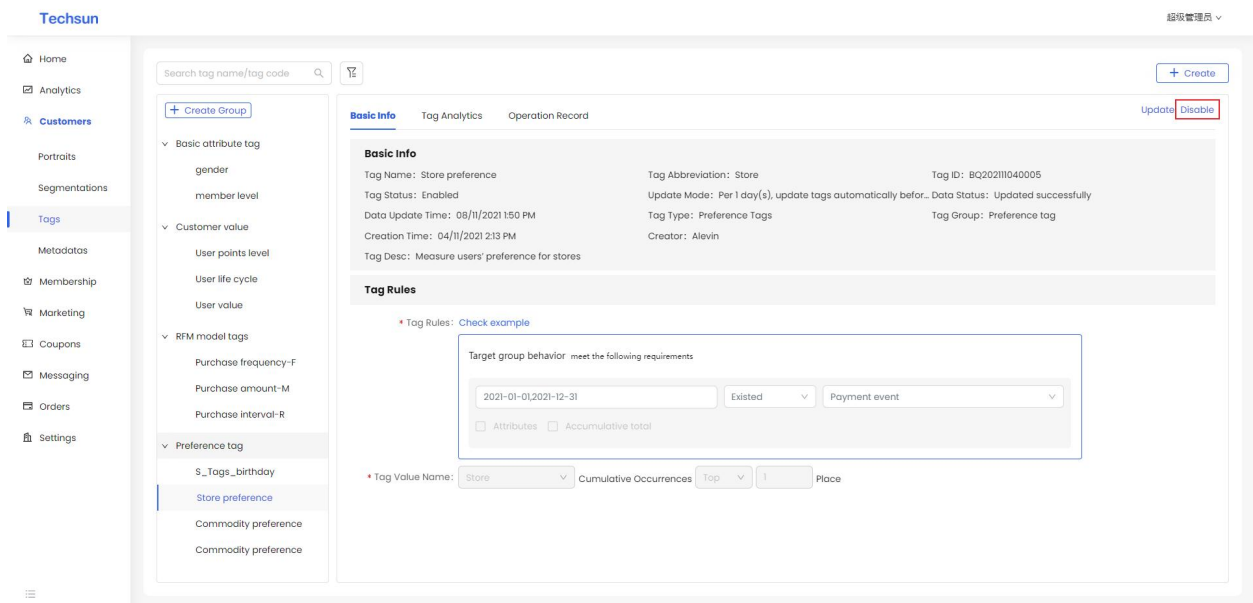
## Step 6: Click the [Enable] label button to enable the label



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

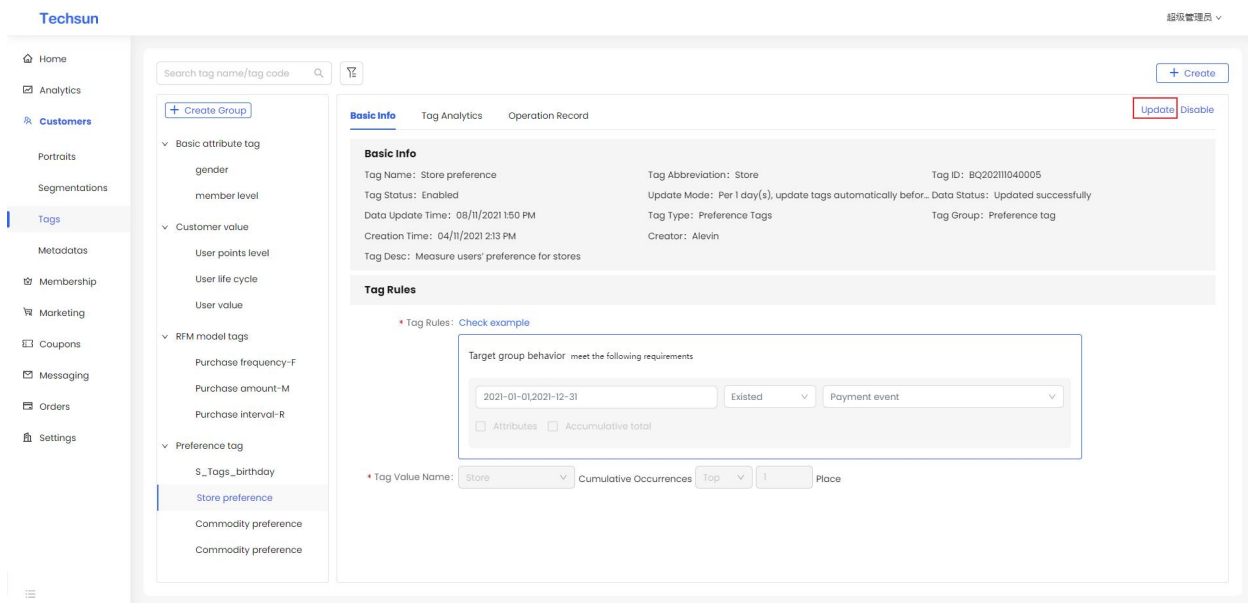
## Step 7: Click the [Disable] label button to disable the label



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

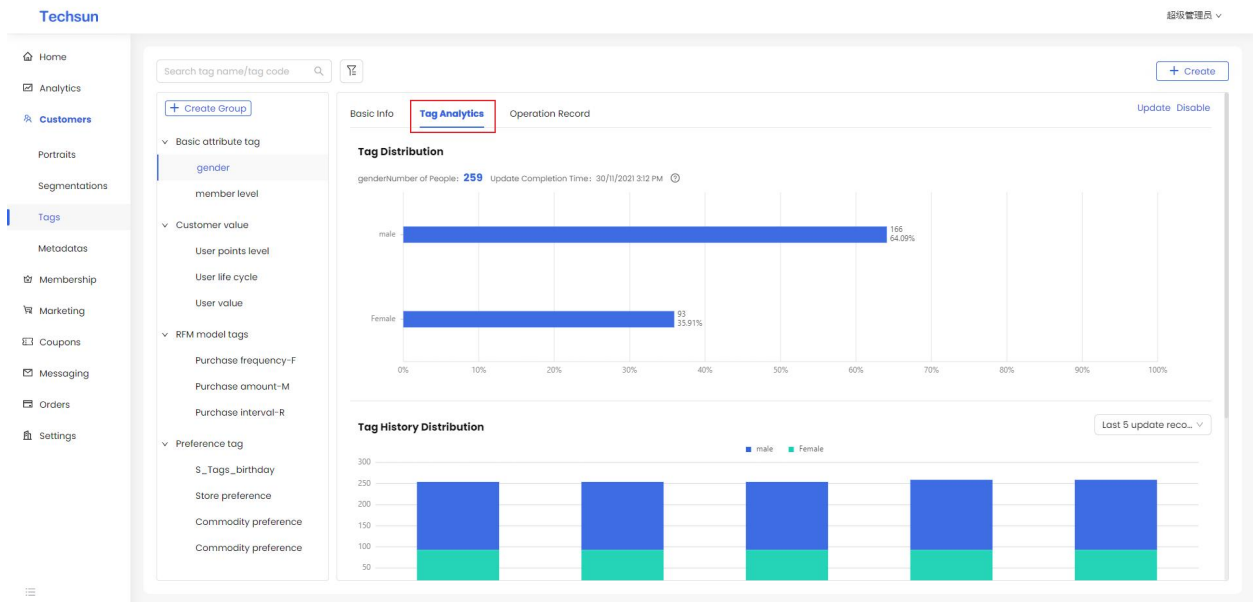
## Step 8: Click the [Update] label button to update the label according to the labeling rules



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

Home Analytics Customers Portraits Segmentations Tags Metadata Membership Marketing Coupons Messaging Orders Settings

Search tag name/tag code

+ Create Group

Basic attribute tag

- gender
- member level

Customer value

- User points level
- User life cycle
- User value

RFM model tags

- Purchase frequency-F
- Purchase amount-M
- Purchase interval-R

Preference tag

- S\_Tags\_birthday
- Store preference
- Commodity preference
- Commodity preference

Basic Info Tag Analytics Operation Record Update Disable

Operator	Operation	Operation Time
administrator	Disable Tag	23/11/2021 2:13 PM
administrator	Enable Tag	23/11/2021 2:13 PM
administrator	Update Tag	23/11/2021 2:32 PM
administrator	Update Tag	23/11/2021 5:39 PM
administrator	Update Tag	30/11/2021 3:11 PM
administrator	Update Tag	30/11/2021 3:12 PM

Total 6 piece(s) of data < 1 > 30 / page

## 7. MEMBERSHIP

### MEMBERS

#### Function Description:

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

**Step 1: Select the menu bar [Membership] → [Members] to enter the member view interface of the loyalty program**

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Home Analytics Customers **Membership** **Members** Points Basic Points Rules Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Search by membership card numb... + Create

Loyalty Program	Customer Name	Member ID	SocialHub ID	Registration Time	Registration Source	Registration Store	Member Status	Creation Time
MBrand Loyalty	CharRain	1000000028	OwrthIBH#H0UEVgc	02/12/2021 8:12 PM	Shopify	sun shop	Normal	02/12/2021 8:12 PM
MBrand Loyalty	binbin	1000000027	ANsl5EET4yoX7abc	02/12/2021 6:24 PM	Shopify	techsun-saas-test8888	Normal	02/12/2021 6:24 PM
MBrand Loyalty	banbin	1000000026	0DJU7T0kgdlqahEb	02/12/2021 6:04 PM	Shopify	techsun-saas-test8888	Normal	02/12/2021 6:04 PM
MBrand Loyalty	sunmay	1000000025	vDHADubIH096Wntq	02/12/2021 5:54 PM	Shopify	hqy-test130-1	Normal	02/12/2021 5:54 PM
MBrand Loyalty	CharJinney	1000000024	0OG3HYIBQYQyWlaT	02/12/2021 5:42 PM	Shopify	sun shop	Normal	02/12/2021 5:42 PM
MBrand Loyalty	黃德成00001	1000000023	zU9mIZIXjS82u5e	02/12/2021 5:42 PM	Shopify	hqy-test3	Normal	02/12/2021 5:42 PM
MBrand Loyalty	高勝	1000000022	f4EukP2wJxkTay5y	02/12/2021 5:42 PM	Shopify	hqy-test3	Normal	02/12/2021 5:42 PM
MBrand Loyalty	黃秋仙	1000000021	sdzQVyt9bicWxfgh	02/12/2021 2:02 PM	Shopify	hqy-test1	Normal	02/12/2021 2:02 PM
MBrand Loyalty	蔡棧	1000000020	FmijdvjTKd5f524T	02/12/2021 2:02 PM	Shopify	hqy-test1	Normal	02/12/2021 2:02 PM
MBrand Loyalty	明台	1000000019	DqkiuMW2dxAe0iw	02/12/2021 2:02 PM	Shopify	hqy-test1	Normal	02/12/2021 2:02 PM
MBrand Loyalty	我的測試	1000000018	XMynwaBMoGmMRIZ	02/12/2021 2:02 PM	Shopify	hqy-test1	Normal	02/12/2021 2:02 PM

Total 228 piece(s) of data 1 2 3 4 5 6 7 8 > 30 条/页 跳至 页

#### Instruction Manual:

- 1) Support search query by member ID;

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

Home > Membership > Members > Details

**Basic Info**

Loyalty Program: MBrand Loyalty  
SocialHub: I9lx37jcOj3zvKAI  
Registration Source: Shopify  
Registration Store: sdwebsite  
First Purchase Time: 2021-11-05 16:52:12  
Accumulated points for judging relegation: 68  
Consumption times for judging relegation(Within tier validity): 0  
Creation Time: 05/11/2021 3:53 PM

Member ID: 1000000456  
Customer Name: Glen Smith  
Registration Time: 05/11/2021 3:53 PM  
Member Status: Normal  
Recent Purchase Time: 2021-11-05 16:52:12  
Consumption amount for judging relegation: 0  
Channel Mark:  
Modification Time: 05/11/2021 4:52 PM

**Tier Change Record**

Tier Name	Customer Name	Member ID	Tier ID	Tier Type	Change Type	Tier Rules	Tier Effective Time	Tier Expiry Time	Tier Status	Creation Time
Card member	Glen Smith	1000000456	Card member	Basis	Automatic		05/11/2021 3:53 PM		Effective	05/11/2021 4:52 PM

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**

Home > Membership > Members > Details

**Basic Info**

Loyalty Program: MBrand Loyalty  
SocialHub: I9lx37jcOj3zvKAI  
Registration Source: Shopify  
Registration Store: sdwebsite  
First Purchase Time: 2021-11-05 16:52:12  
Accumulated points for judging relegation: 68  
Consumption times for judging relegation(Within tier validity): 0  
Creation Time: 05/11/2021 3:53 PM

Member ID: 1000000456  
Customer Name: Glen Smith  
Registration Time: 05/11/2021 3:53 PM  
Member Status: Normal  
Recent Purchase Time: 2021-11-05 16:52:12  
Consumption amount for judging relegation: 0  
Channel Mark:  
Modification Time: 05/11/2021 4:52 PM

**Tier Change Record**

Tier Name	Customer Name	Member ID	Tier ID	Tier Type	Change Type	Tier Rules	Tier Effective Time	Tier Expiry Time	Tier Status	Creation Time
Card member	Glen Smith	1000000456	Card member	Basis	Automatic		05/11/2021 3:53 PM		Effective	05/11/2021 4:52 PM

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

**Techsun** Alevin ▾

Home Analytics Customers **Membership** Members Points Basic Points Rules Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Loyalty Program: MBrand Loyalty  
SocialHub: I8x37cOj3zvKAI  
Registration Source: Shopify  
Registration Store: sdwebsite  
First Purchase Time: 2021-11-05 16:52:12  
Accumulated points for judging relegation: 68  
Consumption times for judging relegation(Within tier validity): 0  
Creation Time: 05/11/2021 3:53 PM

Member ID: 1000000456  
Customer Name: Glen Smith  
Registration Time: 05/11/2021 3:53 PM  
Member Status: Normal  
Recent Purchase Time: 2021-11-05 16:52:12  
Consumption amount for judging relegation: 0  
Channel Mark:  
Modification Time: 05/11/2021 4:52 PM

**Tier Change Record**

Tier Name	Customer Name	Member ID	Tier ID	Tier Type	Change Type	Tier Rules	Tier Effective Time	Tier Expiry Time	Tier Status	Creation Time
Card member	Glen Smith	1000000456	Card member	Basis	Automatic		05/11/2021 3:53 PM		Effective	05/11/2021 3:53 PM

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
Integral value	Glen Smith	1000000456	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**

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Home Analytics Customers **Membership** Members Points Basic Points Rules Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Home > Membership > Members > Details

Basic Info **Third-party Account** Member Order Coupon Behavior Record WeChat Record SMS Record

**Basic Info**

Store: sdwebsite  
Third-party Account ID: \*\*\*\*\*244  
Bound Status: Yes  
Unbinding Time:  
Modification Time: 05/11/2021 3:53 PM

Account Type: Express Official Website Account  
Third-party Account Nickname: \*\*\*\*\*244  
Binding Time: 05/11/2021 3:53 PM  
Creation Time: 05/11/2021 3:53 PM

**Step 6: Inquire about member orders information through member order**



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Home ▾ Analytics ▾ Customers ▾ **Membership**

Members

Points

Basic Points Rules

Promotion Points...

Loyalty Configur...

Marketing

Coupons

Messaging

Orders

Settings

Home ▾ Membership ▾ Members ▾ Details

Basic Info Third-party Account **Member Order** Coupon Behavior Record WeChat Record SMS Record

Order ID	Customer Name	Member ID	Order Type	Order Direction	Source Channel	Order Date	Store	Store ID	Receivable Amount(Facevalue)	Total Discount Amount(Discount)	Receivable Net Value
order2030000243	Glen Smith	1000000456	Take-out	Standard Order	NEWPOS	06/11/2021 8:32 PM	SG Central Store	SG Central	\$66.00	\$0.00	\$66.00

Total 1 piece(s) of data < 1 > 30 条/页 ▾

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

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Home ▾ Analytics ▾ Customers ▾ **Membership**

Members

Points

Basic Points Rules

Promotion Points...

Loyalty Configur...

Marketing

Coupons

Messaging

Orders

Settings

Home ▾ Membership ▾ Members ▾ Details

Basic Info Third-party Account Member Order **Coupon** Behavior Record WeChat Record SMS Record

Coupon ID	Coupon Rule ID	Coupon Name	Coupon Type	Coupon Content	Customer Name	Member ID	Coupon Status	Claim Time	Consumption Time	Order ID	Consumption Order Amount	Related Marketing Campaign Name
5361421549323706	2021020100002				Glen Smith	1000000456	Issued	02/12/2021 10:38 AM			\$0	

Total 1 piece(s) of data < 1 > 30 条/页 ▾

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

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Home ▾ Analytics ▾ Customers ▾ **Membership**

Members Points Basic Points Rules Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Home ▾ Membership ▾ Members ▾ **Details**

Basic Info Third-party Account Member Order Coupon **Behavior Record** WeChat Record SMS Record

Full Name	Customer Name	Member ID	Behavior Type	Source Channel	Occurred Channel	Occurred Time	Changed Tier	Creation Time
Purchase	Glen Smith	1000000456	Purchase	POS		05/11/2021 4:52 PM		05/11/2021 4:5
First Purchase	Glen Smith	1000000456	First Purchase	POS		05/11/2021 4:52 PM		05/11/2021 4:5
Registration	Glen Smith	1000000456	Registration	Express Official Website		05/11/2021 3:53 PM		05/11/2021 3:5

Total 3 piece(s) of data < 1 > 30 条/页 ▾

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

**Techsun** Alevin ▾

Home ▾ Analytics ▾ Customers ▾ **Membership**

Members Points **Basic Points Rules** Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Home ▾ Membership ▾ Points ▾ **Details**

Basic Info **Point Statement**

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 < 1 > 30 条/页 ▾

## 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;

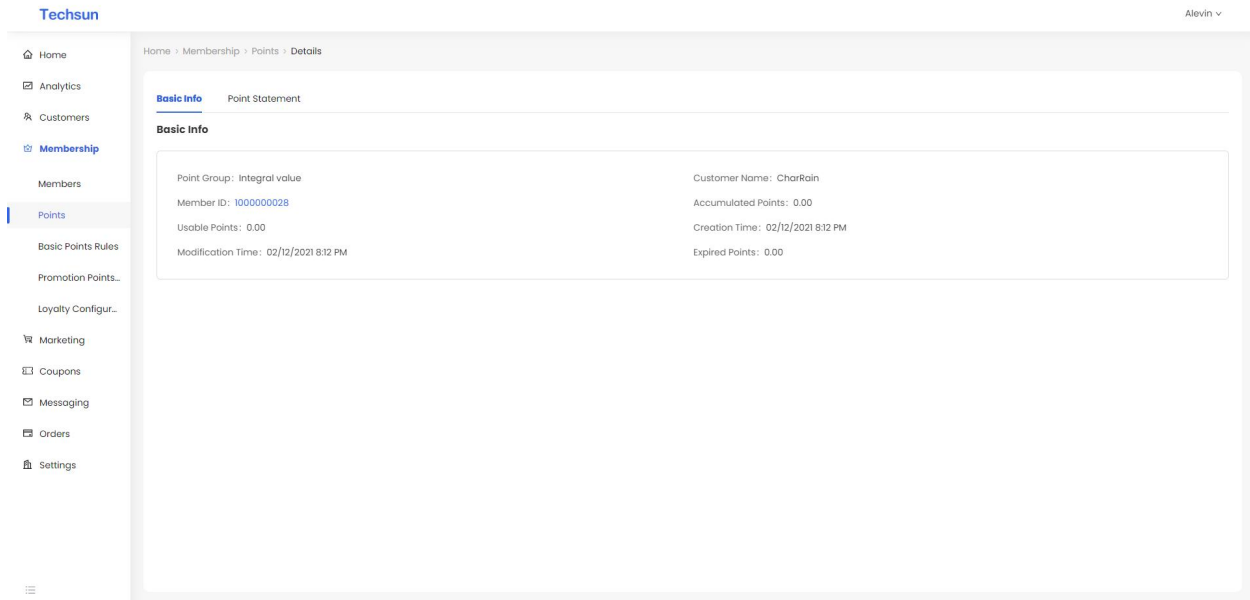
## Step 1: Select the menu bar [Membership] → [Points] to enter the point account view interface

Point Group	Customer Name	Member ID	Accumulated Points	Usable Points	Expired Points	Creation Time
Integral value	CharRain	1000000028	0.00	0.00	0.00	02/12/2021 8:12 PM
growth value	CharRain	1000000028	0.00	0.00	0.00	02/12/2021 8:12 PM
Integral value	binbin	1000000027	0.00	0.00	0.00	02/12/2021 6:24 PM
growth value	binbin	1000000027	0.00	0.00	0.00	02/12/2021 6:24 PM
Integral value	banbin	1000000026	0.00	0.00	0.00	02/12/2021 6:04 PM
growth value	banbin	1000000026	0.00	0.00	0.00	02/12/2021 6:04 PM
Integral value	sunmay	1000000025	0.00	0.00	0.00	02/12/2021 5:54 PM
growth value	sunmay	1000000025	0.00	0.00	0.00	02/12/2021 5:54 PM
Integral value	CharJinney	1000000024	0.00	0.00	0.00	02/12/2021 5:42 PM
growth value	CharJinney	1000000024	0.00	0.00	0.00	02/12/2021 5:42 PM
Integral value	黄丽斌00001	1000000023	0.00	0.00	0.00	02/12/2021 5:42 PM

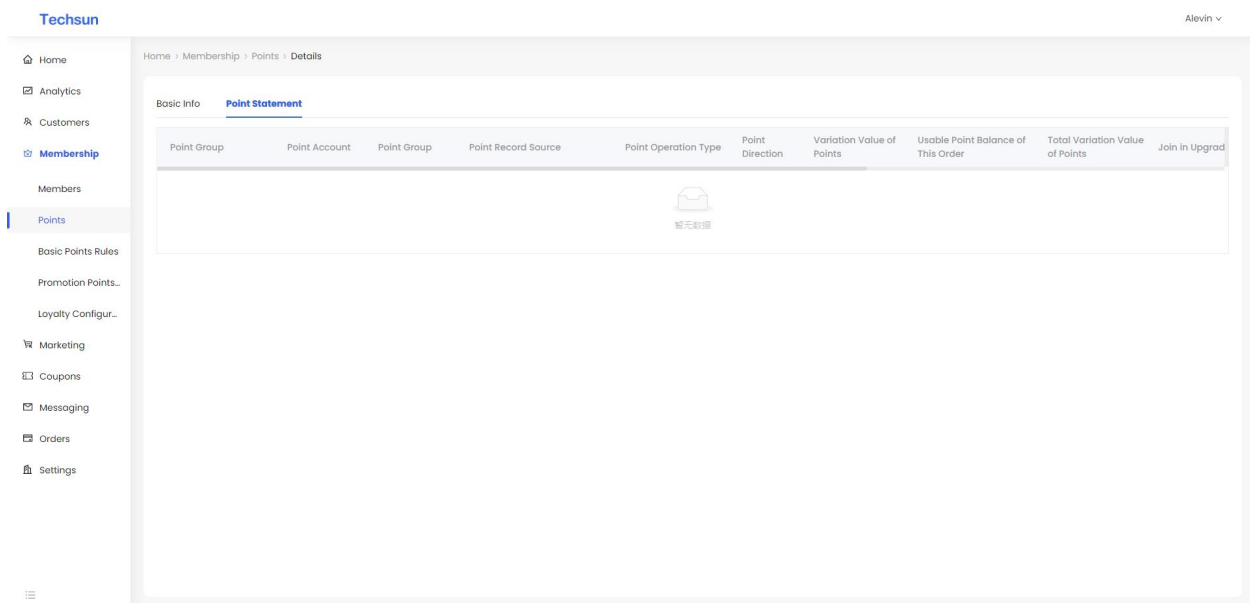
### Instruction Manual:

- 1) Support search query by name;

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



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



### 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;

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

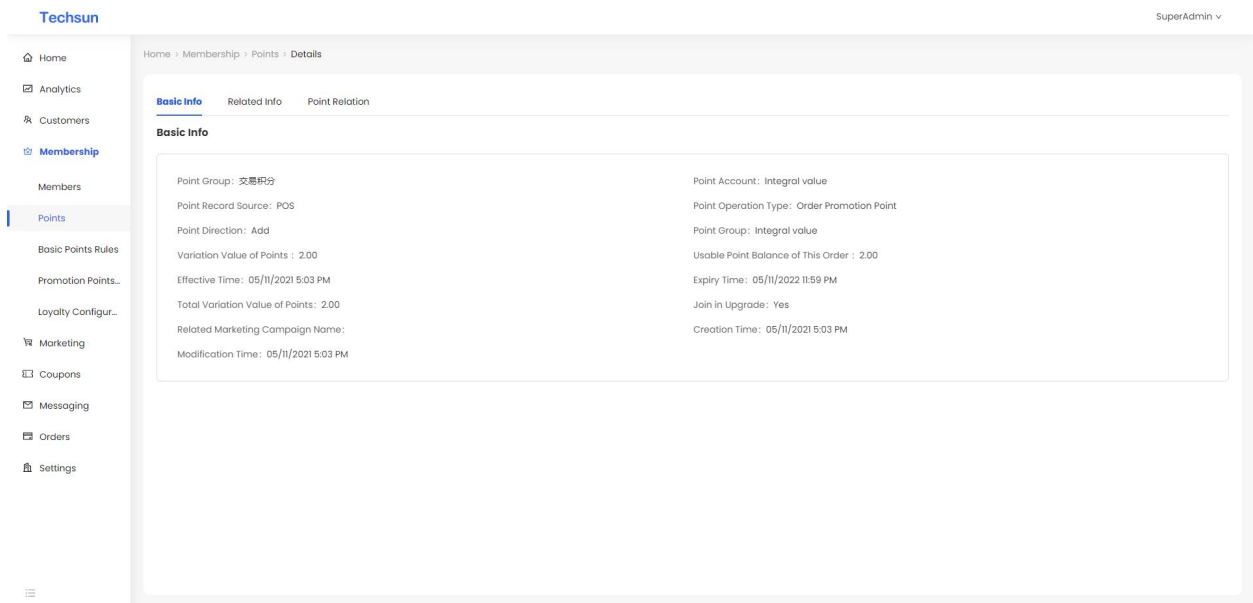
Techsun SuperAdmin v

Home > Membership > Points > Details

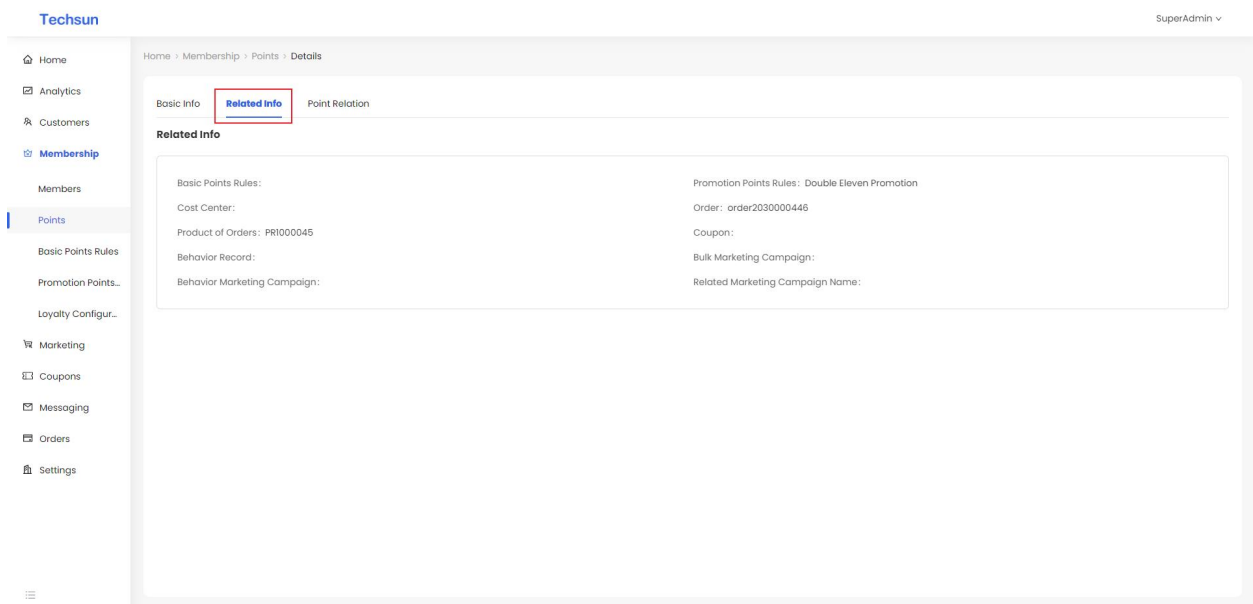
Basic Info Point Statement

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 Points	Add	58.00		58.00	Yes
交易积分	Integral value	Integral value	POS	Order Points	Add	26.00		26.00	Yes
交易积分	Integral value	Integral value	POS	Order Points	Add	33.00		33.00	Yes
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	25.00		25.00	Yes
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

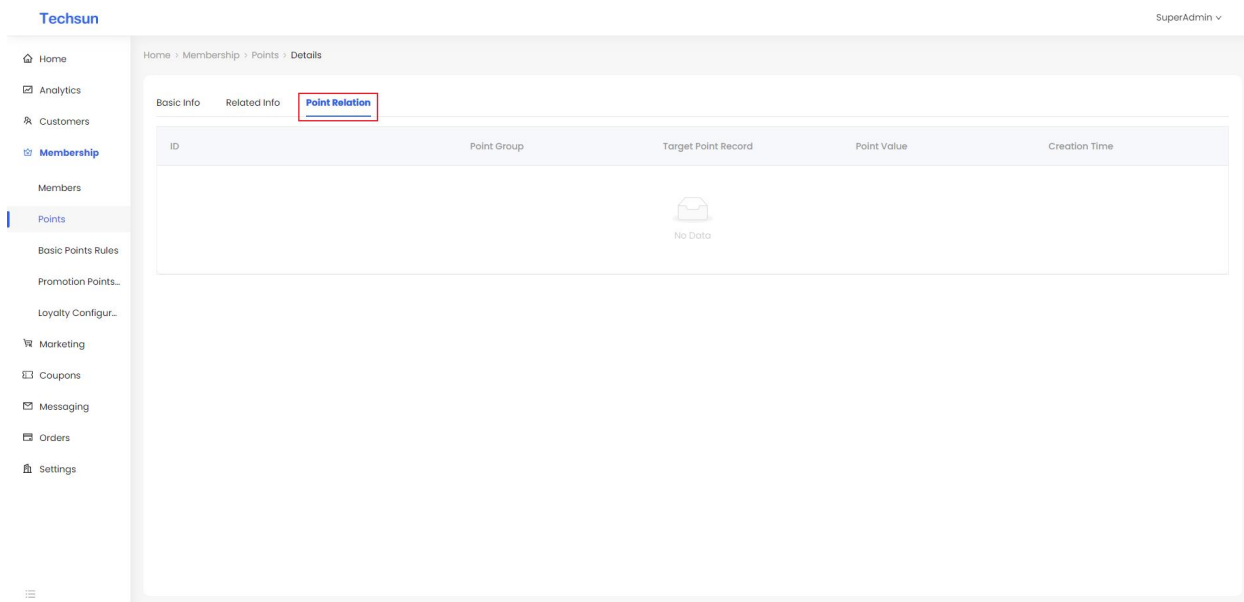
Total 7 piece(s) of data < 1 > 30 条/页



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



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



## 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;

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

主页 / 积分中心 / 积分关系 / 详情

基础信息 源积分

名称	积分关系记录	积分值	-30
目标积分记录	积分兑换卡券		

创建时间	2021-03-23 14:19:14	修改时间	2021-03-23 14:19:14
------	---------------------	------	---------------------

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

主页 / 积分中心 / 积分关系 / 详情

基础信息 源积分

源积分	积分值
00170000-0000-0570-8034-f17858976acc	-30

显示1至1共1条 15条/页



## 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 realize	Main business logic
Basic Points Engine	Positive single processing	<ol style="list-style-type: none"> <li>1. Provide the points calculation queue to the front end, after the front-end orders is completed, transfer the order to the points calculation queue</li> <li>2. According to the orders information, the actual received amount will be apportioned according to the order details;</li> <li>3. Determine whether the membership level complies with the rules;</li> <li>4. Determine whether the product complies with the rules;</li> <li>5. Determine whether the order store complies with the rules;</li> <li>6. Determine whether the discount complies with the rules;</li> <li>7. How to calculate points: According to the quantity of the product or the amount of the order</li> <li>8. Get the calculation formula, 1 yuan 1 point or 1 unit of 1 point;</li> <li>9. Get points validity period mode</li> </ol>

		10. Calculate points based on the final result; 11. Create points records, update the accumulated points and available points on the points account;
	Chargeback processing	1. The front-end order channel sends the refund details to the Social Hub back office; 2. Social Hub creates order return order details 3. Determine whether this chargeback statement has earned basic points 4. If you get the basic points, create a return point record, and return it according to the basic points you have obtained (otherwise, you don't need to return it if you don't get the basic points) 5. Update the accumulated points and available points on the points account;

## 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  $\geq$  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] → [Basic Points Rules] to enter the integration rules view interface

The screenshot shows the Techsun Social Hub interface. On the left sidebar, the 'Membership' menu is selected, and 'Basic Points Rules' is highlighted. The main content area displays a table of loyalty rules. The table has the following columns: 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, and Operation. There are four rows of data representing different membership levels: diamond, platinum, gold, and card. Each row includes a unique rule ID, the 'MBrand Loyalty' program, and specific rules for obtaining points (e.g., 'Order Amount' and 'Integral value'). The 'Basic Point Validity Type' is set to 'Fixed Duration' for all rules. The 'Applicable Products' are 'All products' and 'Applicable Stores' are 'All stores'. The 'Creation Time' for all rules is '02/11/2021 3:05 PM'. Each row has 'Edit' and 'Delete' links in the 'Operation' column. A '+ Create' button is located in the top right corner of the table area. At the bottom of the table, it indicates 'Total 4 piece(s) of data' and '30 / page'.

### Instruction Manual:

- 1) Support search query by rule name;

## Step 2: Click the [Create] button

Techsun wenwen

Home Analytics Customers Membership Members Points Basic Points Rules Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Search by rule name/rule code

+ Create

Point Rule Name	Point Rule ID	Loyalty Program	Obtaining Way	Point Group	Point/Unit	Point/A Product	Join in Upgrade	Basic Point Validity Type	Applicable Products	Applicable Stores	Creation Time	Operation
diamond member points rules	202110200004	MBrand Loyalty	Order Amount	Integral value	2		Yes	Fixed Duration	All products	All stores	02/11/2021 3:08 PM	Edit Delete
Platinum member points rules	202110200003	MBrand Loyalty	Order Amount	Integral value	2		Yes	Fixed Duration	All products	All stores	02/11/2021 3:07 PM	Edit Delete
Gold member points rules	202110200002	MBrand Loyalty	Order Amount	Integral value	1		Yes	Fixed Duration	All products	All stores	02/11/2021 3:06 PM	Edit Delete
Card member points rules	202110200001	MBrand Loyalty	Order Amount	Integral value	1		Yes	Fixed Duration	All products	All stores	02/11/2021 3:05 PM	Edit Delete

Total 4 piece(s) of data < 1 > 30 / page

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

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Home > Membership > Basic Points Rules > Create

**Basic Info**

\* Point Rule Name:

\* Loyalty Program:

\* Cost Center:

**Applicable Conditions**

Tier:

\* Applicable Products: ☒ Usable for all products ☐ Usable for specific products

\* Applicable Stores: ☒ Usable for all stores ☐ Usable for specific stores

Discount Limit: When products paid amount/original price ≥  give points

**Point Validity**

\* Point Group:

\* Obtaining Way: ☐ Order Amount ☐ Product Quantity

\* Basic Point Validity Type: ☐ Fixed Date ☒ Fixed Duration

Cancel Save

### Step 4: Complete the creation of the points rules

Techsun wenwen v

Home Analytics Customers Membership Members Points Basic Points Rules Promotion Points... Loyalty Configur... Marketing Coupons Messaging Orders Settings

Search by rule name/rule code

+ Create

Point Rule Name	Point Rule ID	Loyalty Program	Obtaining Way	Point Group	Point/Value	Point/A Product	Join in Upgrade	Basic Point Validity Type	Applicable Products	Applicable Stores	Creation Time	Operation
diamond member points rules	202110200004	MBrand Loyalty	Order Amount	Integral value	2		Yes	Fixed Duration	All products	All stores	02/11/2021 3:08 PM	Edit Delete
Platinum member points rules	202110200003	MBrand Loyalty	Order Amount	Integral value	2		Yes	Fixed Duration	All products	All stores	02/11/2021 3:07 PM	Edit Delete
Gold member points rules	202110200002	MBrand Loyalty	Order Amount	Integral value	1		Yes	Fixed Duration	All products	All stores	02/11/2021 3:06 PM	Edit Delete
Card member points rules	202110200001	MBrand Loyalty	Order Amount	Integral value	1		Yes	Fixed Duration	All products	All stores	02/11/2021 3:05 PM	Edit Delete

Total 4 piece(s) of data < 1 > 30 / page v

## PROMOTIONAL POINTS RULE CALCULATION ENGINE

name	Method to realize	Main business logic
Promotional Points Engine	Positive single processing	<ol style="list-style-type: none"> <li>Provide the points calculation queue to the front end, after the front-end orders is completed, transfer the order to the points calculation queue</li> <li>According to the orders information, the actual received amount will be apportioned according to the order details;</li> <li>Determine whether the order time complies with the rules;</li> <li>Judge whether the crowd conforms to the rules;</li> <li>Determine whether the product complies with the rules;</li> <li>Determine whether the order store complies</li> </ol>

		<p>with the rules;</p> <ol style="list-style-type: none"> <li>7. Determine whether the discount complies with the rules;</li> <li>8. Judge whether the points threshold complies with the rules;</li> <li>9. Determine whether to participate in this promotion point rule repeatedly</li> <li>10. Get points validity period mode</li> <li>11. How to get points calculation: according to whether the amount is full or the amount is full</li> <li>12. Get the calculation formula: <ol style="list-style-type: none"> <li>a) The promotion points rule supports whether to superimpose the rule configuration, the promotion points rule does not support the superposition, then the calculation matches the maximum points rule to give points</li> <li>b) Some rules support stacking, first compare the maximum rule points that do not support stacking rules, and give them together with the stacking rule points</li> <li>c) Some rules support stacking, first compare the maximum rule points that do not support stacking rules, and give them together with the stacking rule points</li> </ol> </li> <li>1. The bonus points will be apportioned in proportion to the order amount or product data, and the bonus points details will be recorded</li> <li>2. Update the accumulated points and available</li> </ol>
--	--	---

		points on the points account;
	Chargeback processing	<ol style="list-style-type: none"> <li>1. The front-end order channel sends the refund details to the Social Hub back office;</li> <li>2. Social Hub creates order return order details</li> <li>3. Determine whether this chargeback statement has earned promotional points</li> <li>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 )</li> <li>5. Update the accumulated points and available points on the points account;</li> </ol>

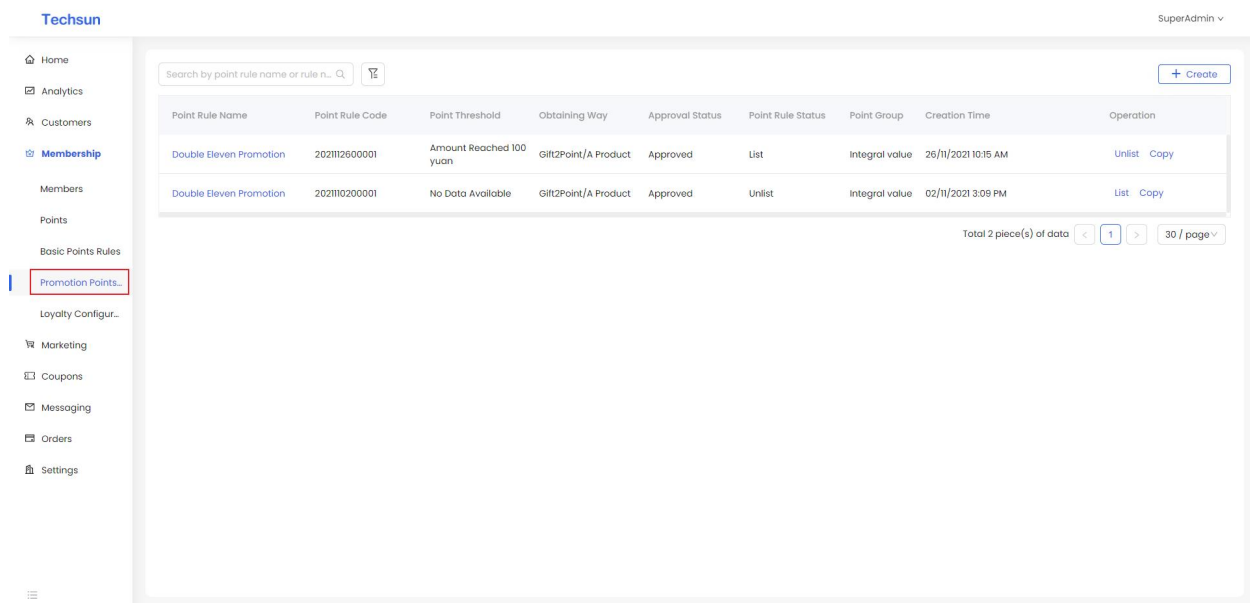
## PROMOTIONAL POINTS RULES

### 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  $\geq$  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] → [Promotion Point Rules] to enter the point rule view interface**

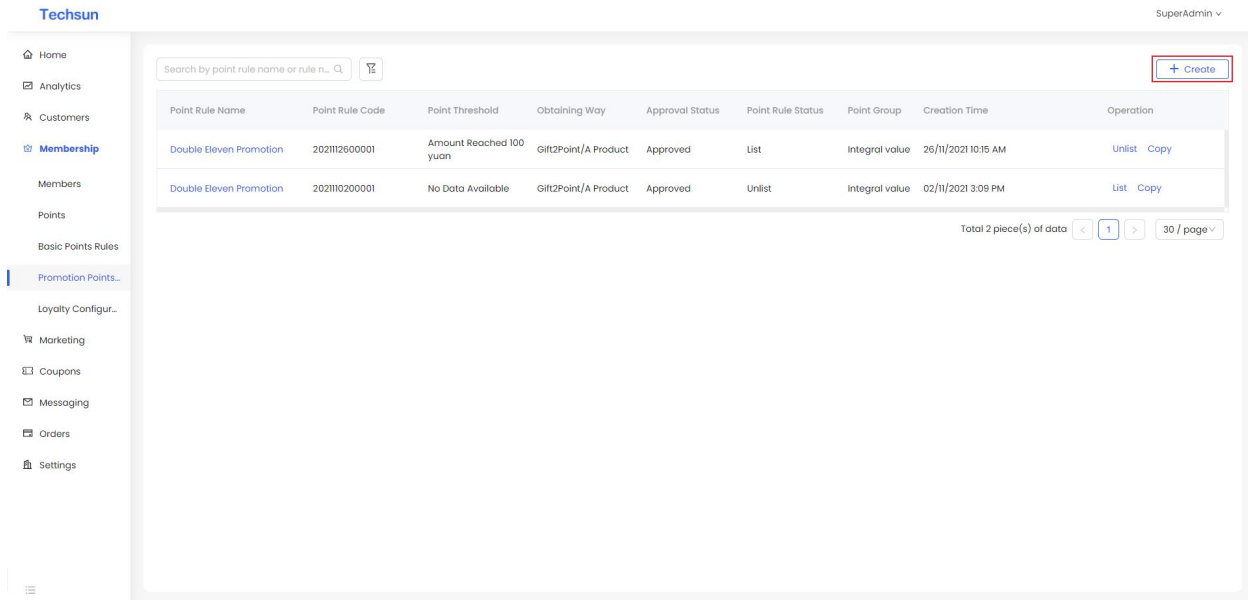


**Instruction Manual:**

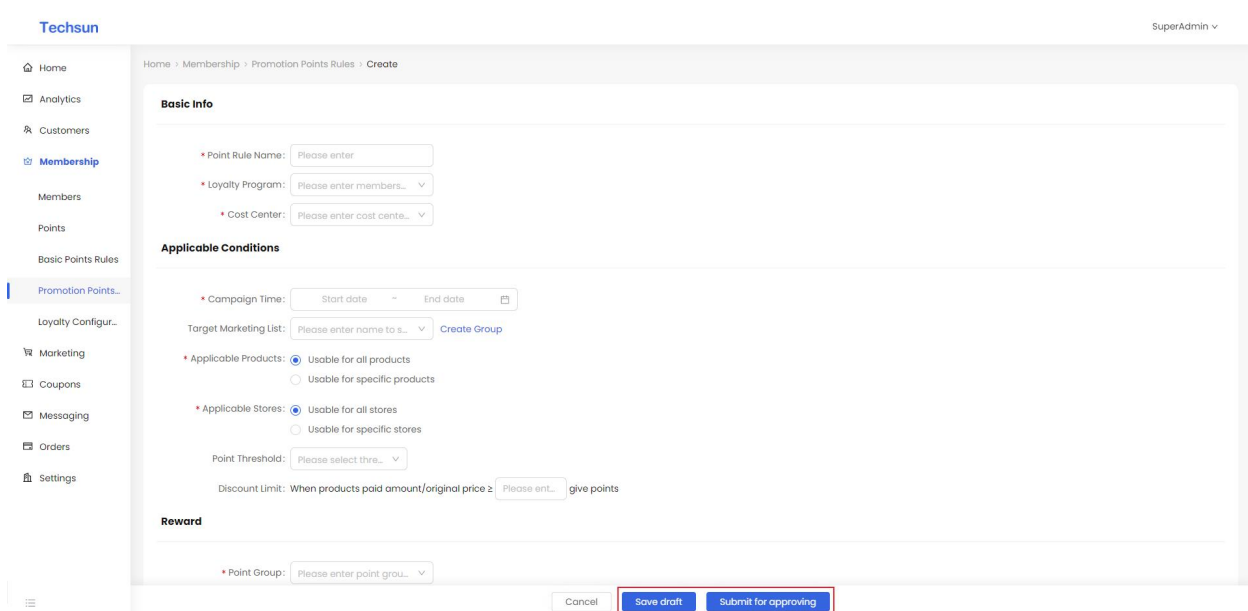
- 1) Support search query by rule name, or filter data by filter conditions;

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

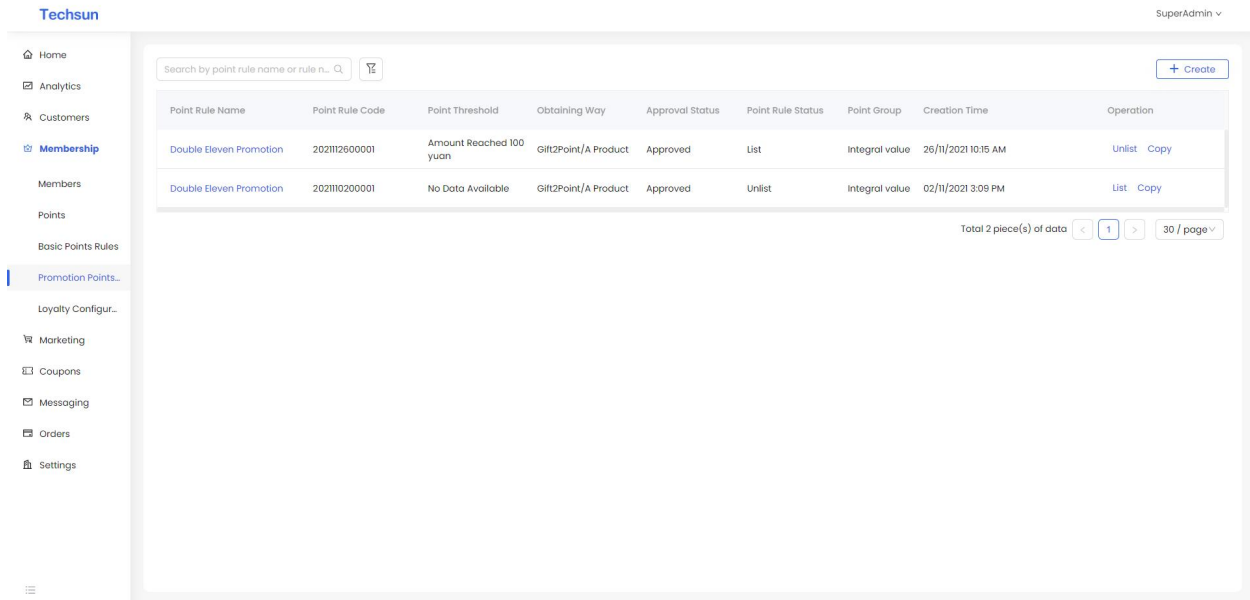




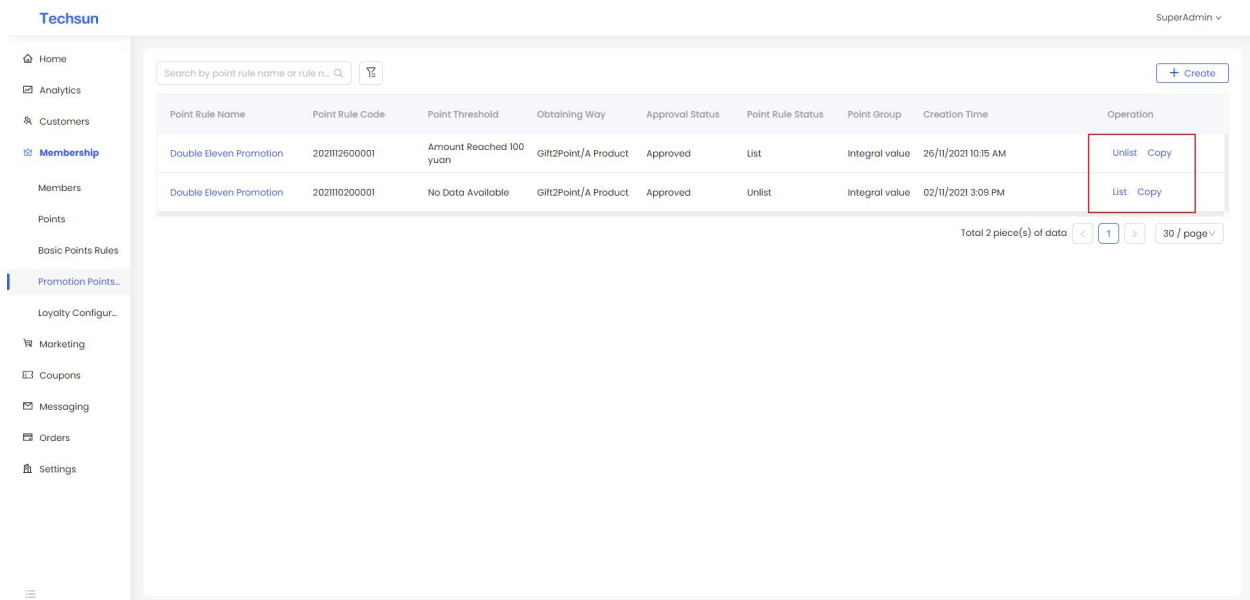
**Step 3: After entering specific information on the creation page, click Save**



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



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



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

Techsun

SuperAdmin

Home

Analytics

Customers

Membership

Members

Points

Basic Points Rules

Promotion Points...

Loyalty Configur...

Marketing

Coupons

Messaging

Orders

Settings

Search by point rule name or rule n...

+ Create

Point Rule Name	Point Rule Code	Point Threshold	Obtaining Way	Approval Status	Point Rule Status	Point Group	Creation Time	Operation
Double Eleven Promotion	2021112600001	Amount Reached 100 yuan	Gift2Point/A Product	Approved	List	Integral value	26/11/2021 10:15 AM	Unlist Copy
Double Eleven Promotion	2021110200001	No Data Available	Gift2Point/A Product	Approved	Unlist	Integral value	02/11/2021 3:09 PM	List Copy

Total 2 piece(s) of data

1

30 / page

Techsun

SuperAdmin

Home

Analytics

Customers

Membership

Members

Points

Basic Points Rules

Promotion Points...

Loyalty Configur...

Marketing

Coupons

Messaging

Orders

Settings

Home > Membership > Promotion Points Rules > Details

Basic Info

Approval Record

Basic Info

Point Rule Name: Double Eleven Promotion

Point Rule Code: 2021112600001

Loyalty Program: MBrand Loyalty

Cost Center: Promotion cost

Point Rule Type: Promotion Points

Point Rule Status: List

Applicable Conditions

Campaign Time: 2021-11-26 00:00:00 to 2021-12-31 23:59:59

Target Marketing List: Usable for all groups

Applicable Stores: Usable for all stores

Applicable Products: Usable for all products

Point Threshold: Amount Reached 100 yuan

Discount Limit: Unlimited

Reward

Point Group: Integral value

Obtaining Way: Gift 2 Point/A Product

Point Validity Type: Fixed Duration

Point Validity: 1 Year

Join in Upgrade: Yes

Superposition Limit: Yes

Repeat Participation: Yes

Cancel

Unlist

## Step 7: You can view the audit record of this promotional point rule

Techsun

SuperAdmin

Home

Analytics

Customers

Membership

Members

Points

Basic Points Rules

Promotion Points...

Loyalty Configur...

Marketing

Coupons

Messaging

Orders

Settings

Home > Membership > Promotion Points Rules > Details

Basic Info

Approval Record

Approval Time	Approver	Approval Status	Approval Comments
2021-11-26 10:15:25	SuperAdmin	Approved	

< 1 >

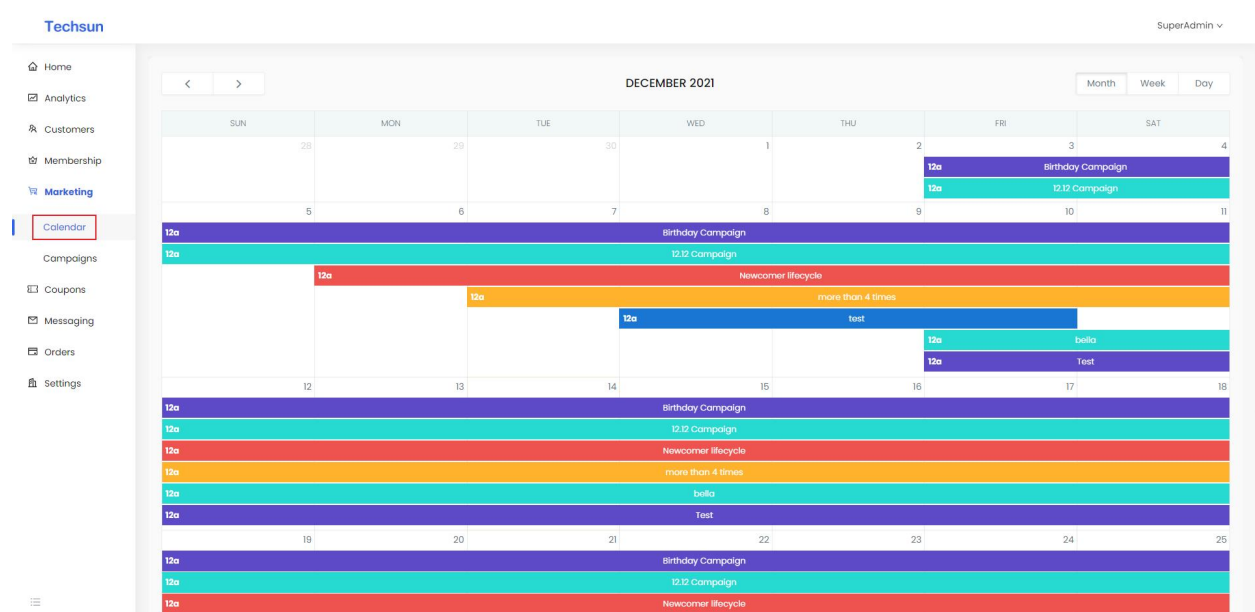
## 8. MARKETING

### 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;
- 2) 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.

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

Techsun SuperAdmin ▾

Home Analytics Customers Membership Marketing **Campaigns** Calendar Coupons Messaging Orders Settings

Search by campaign name/camp... 🔍 + Create

Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
Test	HD2021120028	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
bella	HD2021120027	Draft	Draft	Single campaign	Everyday	Other	Mini-program	MBrand Loyalty	admin	administrator	Edit Copy Delete
test	HD2021120026	Draft	Draft	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	max	Johnson	Edit Copy Delete
more than 4 times	HD2021120025	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	administrator	Copy Approve
Newcomer lifecycle	HD2021120017	Waiting to Start	Approved	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Alevin	Copy Start
Birthday Campaign	HD2021120016	Waiting to Start	Approved	Single campaign	Everyday	Other	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Fairuz	Copy Start

Total 7 piece(s) of data < 1 > 30 / page ▾

### Instruction Manual:

- 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.
- Support to quickly create new marketing activities by copying activities
- Support deleting marketing activities

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

**Techsun** SuperAdmin

Home Analytics Customers Membership **Marketing** Calendar Campaigns Coupons Messaging Orders Settings

Search by campaign name/camp...

Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
Test	HD2021120028	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
bella	HD2021120027	Draft	Draft	Single campaign	Everyday	Other	Mini-program	MBrand Loyalty	admin	administrator	Edit Copy Delete
test	HD2021120026	Draft	Draft	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	max	Johnson	Edit Copy Delete
more than 4 times	HD2021120025	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	administrator	Copy Approve
Newcomer lifecycle	HD2021120017	Waiting to Start	Approved	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Alevin	Copy Start
Birthday Campaign	HD2021120016	Waiting to Start	Approved	Single campaign	Everyday	Other	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Fairuz	Copy Start

Total 7 piece(s) of data

**Techsun** SuperAdmin

Home Analytics Customers Membership **Marketing** Calendar Campaigns Coupons Messaging Orders Settings

Search by campaign name/camp...

**Create custom flow**

**Single campaign**  
Conduct a single or multiple marketing strategies for a specified customer group or a customer that...

**Recurring campaigns**  
Based on a single marketing campaign, with a certain period as the condition, repeatedly...

Total 7 piece(s) of data

## Step 3: Fill in the basic information form of the activity

### Single event form



The screenshot shows the 'Create Campaign' form in the Techsun Social Hub. The left sidebar contains navigation links: Home, Analytics, Customers, Membership, Marketing (selected), Calendar, Campaigns (active), Coupons, Messaging, Orders, and Settings. The main content area is titled 'Home > Marketing > Campaigns > Create'. It features a progress bar with two steps: '1 Campaign Basic Info' (active) and '2 Campaign Flow'. The form fields include: 'Campaign Name' (text input), 'Loyalty Program' (dropdown), 'Campaign Type' (dropdown), 'Campaign Channel' (text input with a dropdown arrow), 'Approver' (dropdown), and 'Campaign Time' (date range picker). Below these fields is a 'Desc:' section with three paragraphs of text. At the bottom right are 'Save' and 'Next Step' buttons.

Techsun SuperAdmin

Home > Marketing > Campaigns > Create

1 Campaign Basic Info 2 Campaign Flow

\* Campaign Name: Please enter

\* Loyalty Program: Please enter name to search

\* Campaign Type: Please select

\* Campaign Channel: Omnichannel + 5 ...

\* Approver: Please enter name to search

\* Campaign Time: Start Time - End Time

Desc:

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

This screenshot is identical to the one above, but it includes the 'Campaign Cycle' field. The 'Campaign Cycle' field has three radio button options: 'Everyday' (selected), 'Every week', and 'Every month'. The rest of the form and the 'Save'/'Next Step' buttons are the same.

Techsun SuperAdmin

Home > Marketing > Campaigns > Create

1 Campaign Basic Info 2 Campaign Flow

\* Campaign Name: Please enter

\* Loyalty Program: Please enter name to search

\* Campaign Type: Please select

\* Campaign Channel: Omnichannel + 5 ...

\* Approver: Please enter name to search

\* Campaign Time: Start Time - End Time

\* Campaign Cycle: ☒ Everyday ☐ Every week ☐ Every month

Desc:

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

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

**Step 1: Campaign Basic Info**

\* Campaign Name:

\* Loyalty Program:

\* Campaign Type:

\* Campaign Channel:  + 5 ...

\* Approver:

\* Campaign Time:  -

\* Campaign Cycle: ☒ Everyday ☐ Every week ☐ Every month

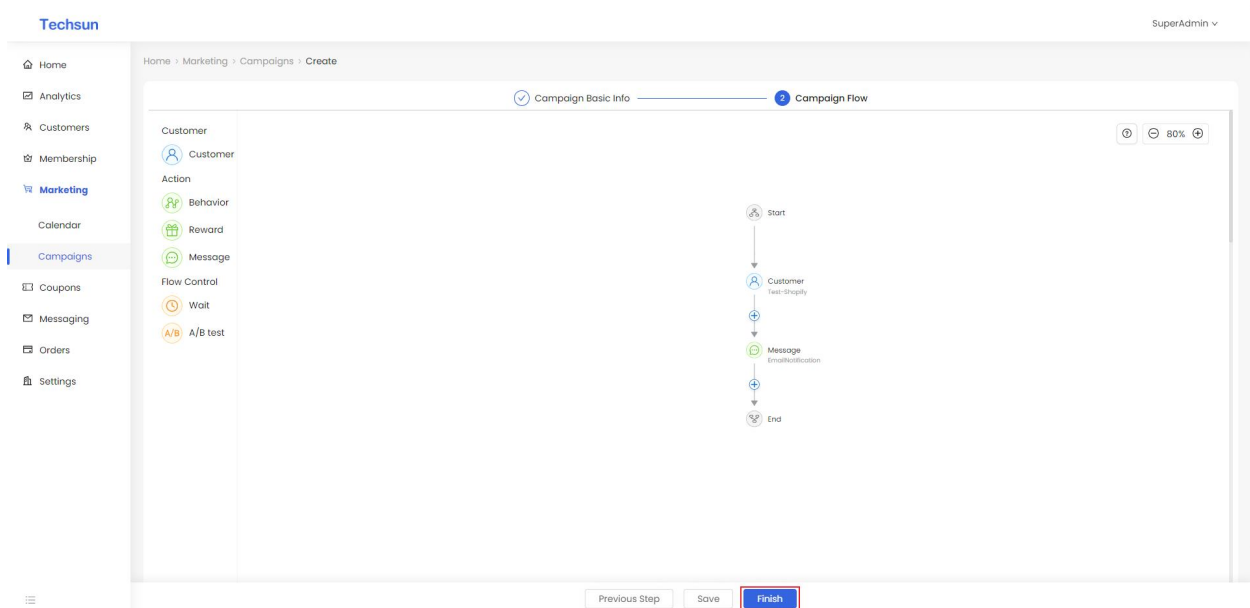
Desc:

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.

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

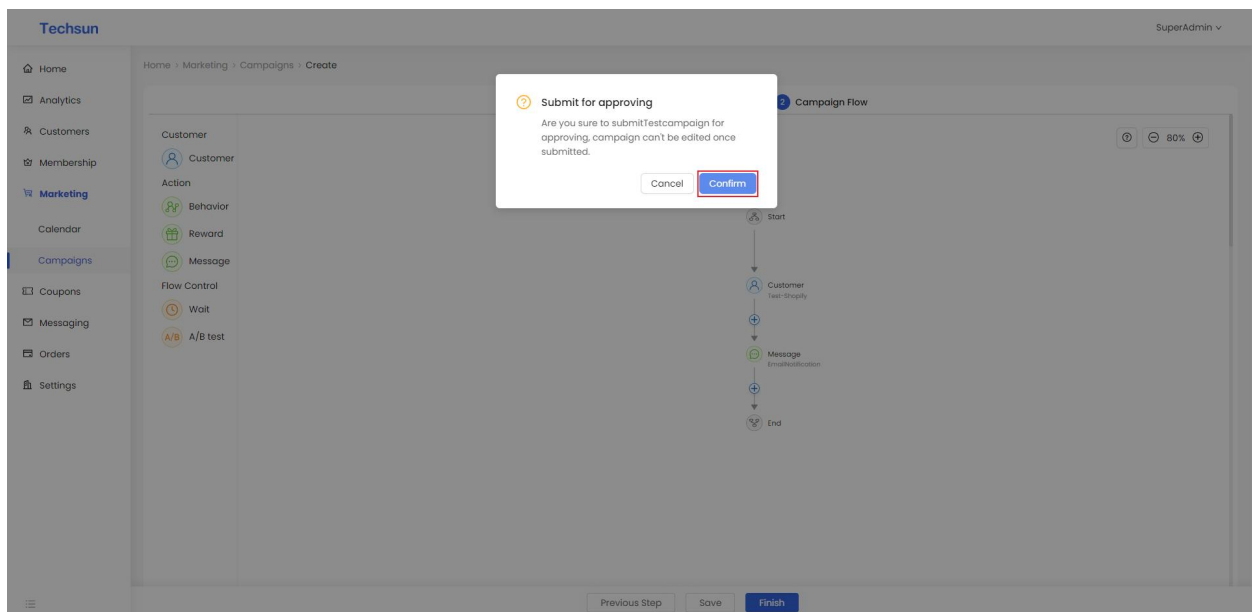


## Instruction Manual:

- 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
- 4) 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**



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

Execution succeed

SuperAdmin

Search by campaign name/camp...

+ Create

Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
Test	HD2021120029	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
Test	HD2021120028	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
bella	HD2021120027	Draft	Draft	Single campaign	Everyday	Other	Mini-program	MBrand Loyalty	admin	administrator	Edit Copy Delete
test	HD2021120026	Draft	Draft	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	max	Johnson	Edit Copy Delete
more than 4 times	HD2021120025	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	administrator	Copy Approve
Newcomer lifecycle	HD2021120017	Waiting to Start	Approved	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	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]

SuperAdmin

Search by campaign name/camp...

+ Create

Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
Test	HD2021120029	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
Test	HD2021120028	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
more than 4 times	HD2021120025	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	administrator	Copy Approve
Newcomer lifecycle	HD2021120017	Waiting to Start	Approved	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Alevin	Copy Start
Birthday Campaign	HD2021120016	Waiting to Start	Approved	Single campaign	Everyday	Other	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Fairuz	Copy Start
JD Brand Loyalty	HD2021120015	Draft	Draft	Single campaign	Everyday	Other	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Fairuz	Copy Start

Total 6 piece(s) of data < 1 > 30 / page

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

Techsun SuperAdmin

Search by campaign name/camp... + Create

Campaign Name	Campaign Code	Campaign Status	Approval Status	Campaign Type	Campaign Cycle	Campaign Type	Campaign Channel	Loyalty Program	Approver	Creator	Operation
Test	HD2021120029	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
Test	HD2021120028	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	admin	administrator	Copy Approve
more than 4 times	HD2021120025	Draft	Under Approval	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	administrator	Copy Approve
Newcomer lifecycle	HD2021120017	In Progress	Approved	Single campaign	Everyday	Customer Journey	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Alevin	Copy <b>End</b>
Birthday Campaign	HD2021120016	Waiting to Start	Approved	Single campaign	Everyday	Other	Official Website, Tmall Flagship Shop, Youzan Cloud Order Mini-program, JD Flagship Shop, Mini-program	MBrand Loyalty	Alevin	Fairuz	Copy Start

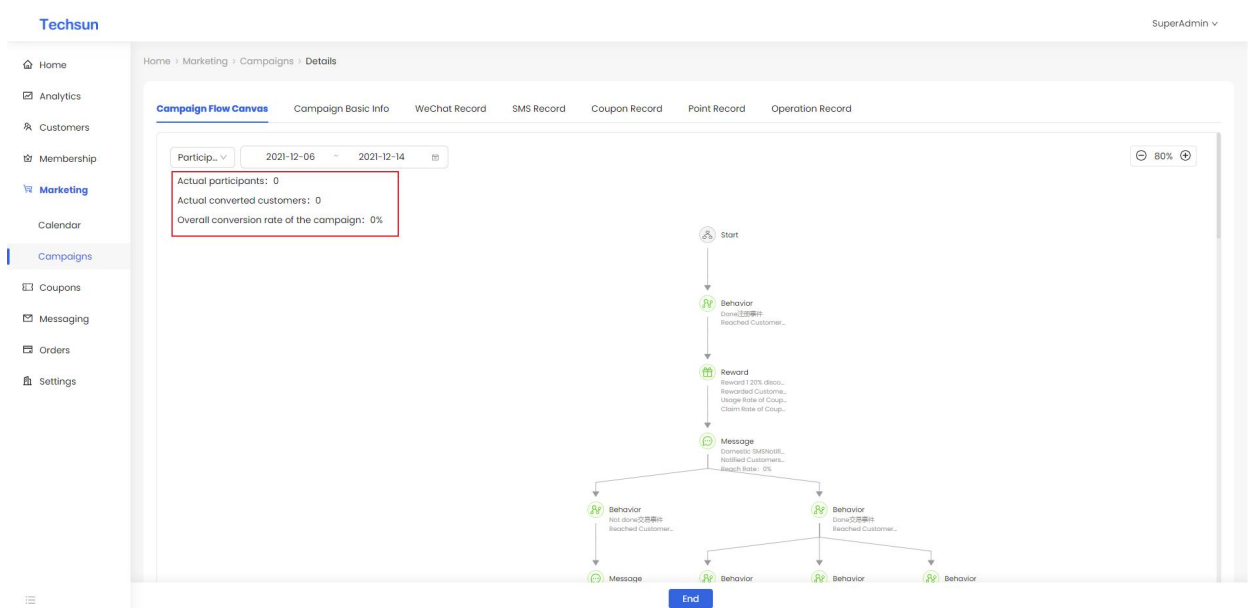
Total 6 piece(s) of data < 1 > 30 / page

## instruction manual

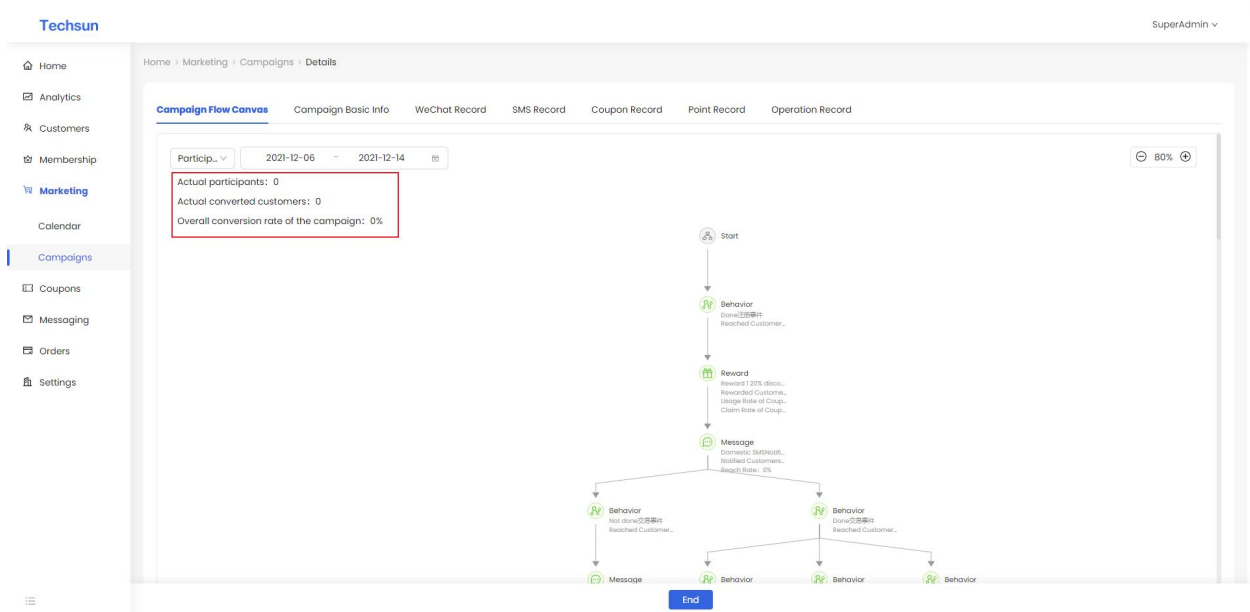
- 1) After clicking End, the entire marketing activity process ends, and the points and coupons issued during the activity can be used as usual.
- 2) After the marketing activity is over, it cannot be restarted.

## Marketing activity analysis

### Marketing funnel analysis (number of people)



## Funnel analysis of marketing activities (person times)



## Coupon record

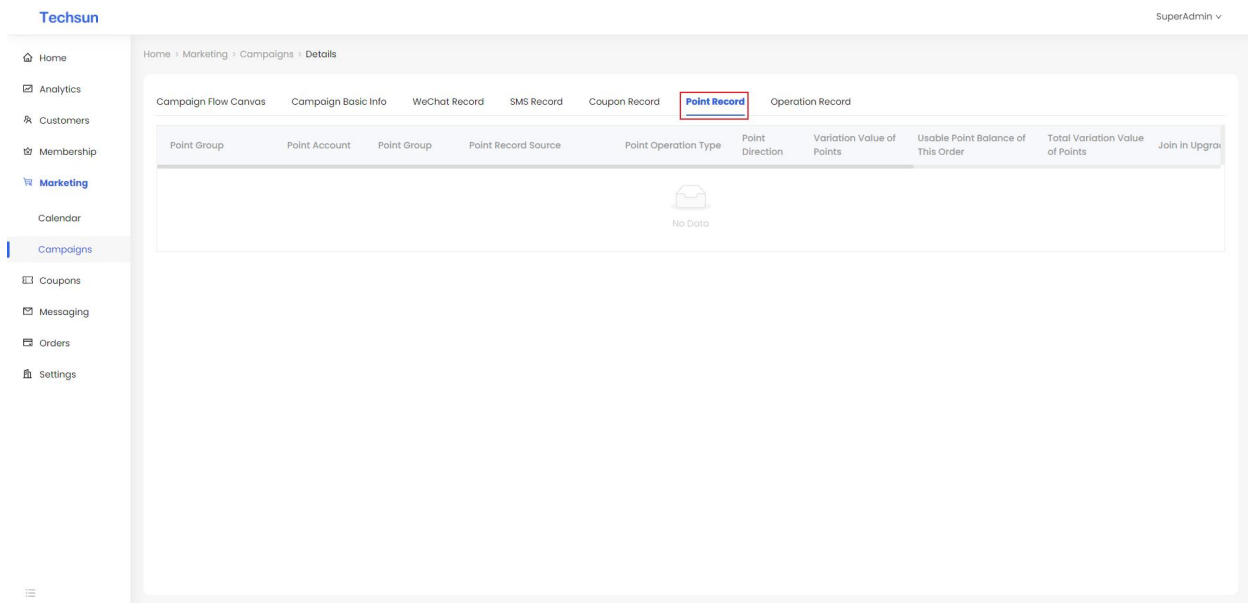
Techsun SuperAdmin

Home > Marketing > Campaigns > Details

Campaign Flow Canvas Campaign Basic Info WeChat Record SMS Record **Coupon Record** Point Record Operation Record

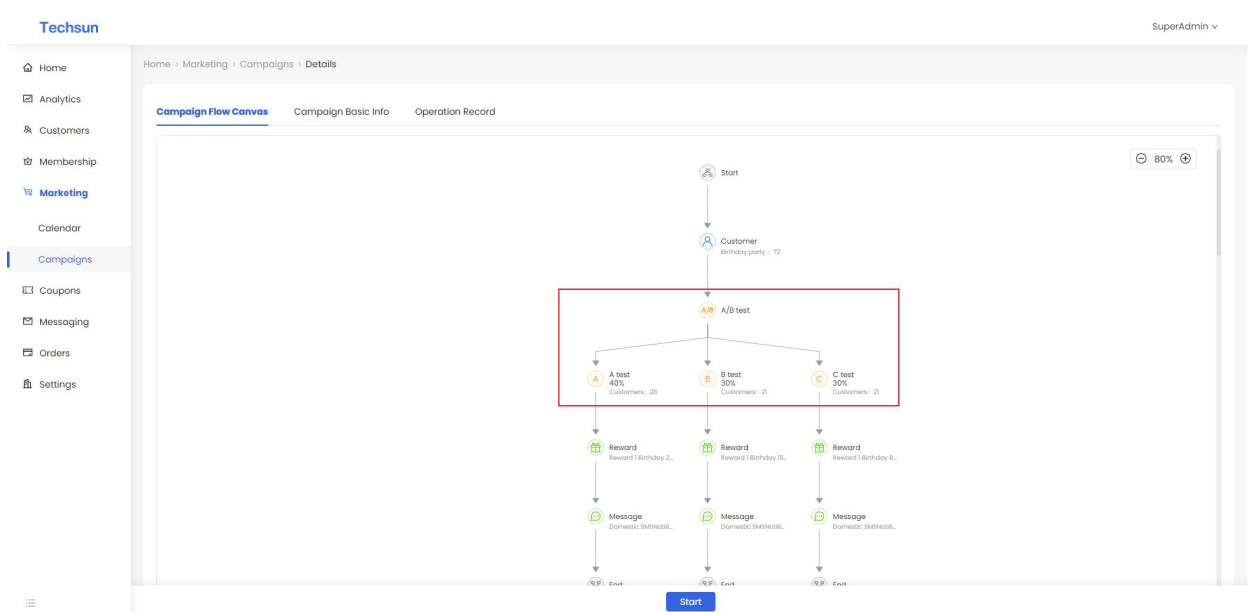
Coupon Code	Coupon Rule Code	Coupon Name	Coupon Type	Coupon Content	Customer Name	Member Code	Coupon Status	Claim Time	Consumption Time	Order Code	Consumption Order Amount	Related Marketing Campaign Name
No Data												

## Points record

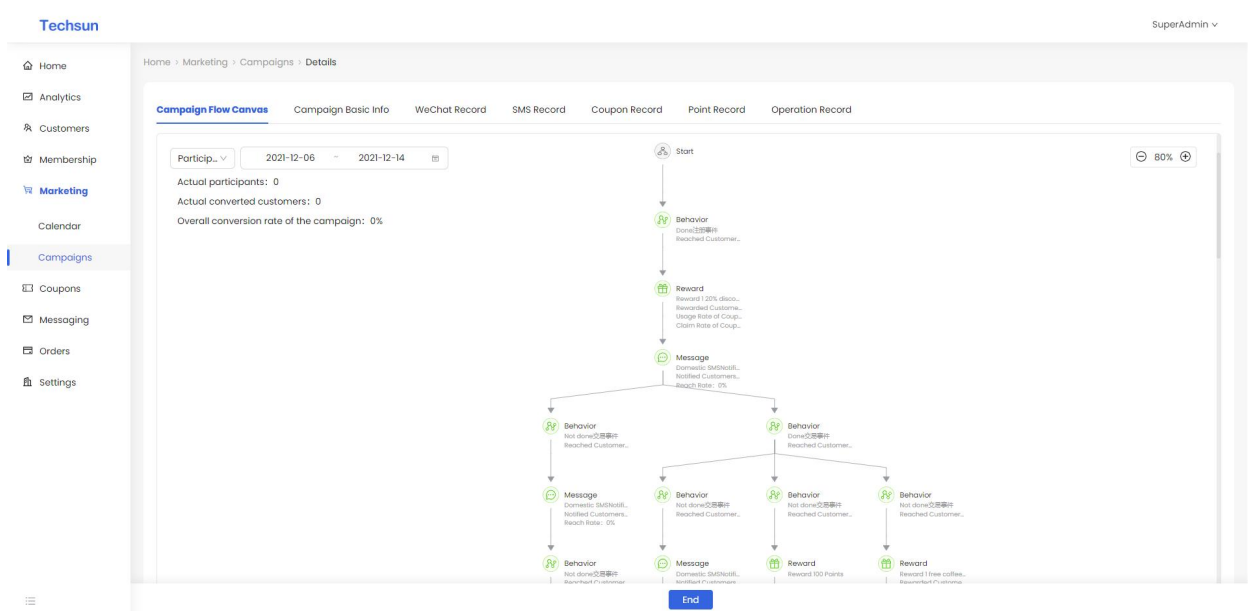


## Examples of marketing activities

### 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] → [Rules] to enter the coupon rules view interface**

**Techsun** SuperAdmin ▾

Home Analytics Customers Membership Marketing **Coupons**

**Rules** Records Transfer Records Messaging Orders Settings

**Cash Back Coupon**  
Eg: Deduct 20 yuan for each 100 yuan  
[Create Now](#)

**Discount Coupon**  
Eg: Get 20% off for orders over 100 yuan  
[Create Now](#)

**Redeem Coupon**  
Eg: Redeem products for orders over 100 yuan  
[Create Now](#)

Coupon Name/Rule Code 🔍

Coupon Name	Coupon Rule Code	Type	Coupon Content	Approval Status	Rule Status	Coupon Validity Type	Effective Time	Expiry Time	Validity Day(s) (Effective after N day(s))	Operation
free coffee	2021120600002	Redeem coupon	Redeem products without threshold	Approved	List	Fixed Date Range			1	Copy Unlist Increase
20% discount coupon	2021120600001	Discount Coupon	Without threshold get 8 Discount	Approved	List	Fixed Date Range			1	Copy Unlist Increase
2022-coupon rule test	2021120100001	Cash Back Coupon	Deduct without threshold 10 Yuan	Under Approval	Draft	Fixed Duration	01/12/2021 0:00 A M	01/11/2022 11:59 P M		Copy Approve
Black Friday-Redeem	2021112500003	Redeem coupon	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
Black Friday-20% discount coupon	2021112500002	Discount Coupon	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 can 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 coupon	Orders over 50 Redeem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
Birthday 150 minus 25 discount coupons	2021111800002	Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Range			1	Copy Unlist Increase

Total 12 piece(s) of data < 1 > 30 / page ▾

## Instruction Manual:

- 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 ▾

Home Analytics Customers Membership Marketing **Coupons**

**Rules** Records Transfer Records Messaging Orders Settings

**Cash Back Coupon**  
Eg: Deduct 20 yuan for each 100 yuan  
[Create Now](#)

**Discount Coupon**  
Eg: Get 20% off for orders over 100 yuan  
[Create Now](#)

**Redeem Coupon**  
Eg: Redeem products for orders over 100 yuan  
[Create Now](#)

Coupon Name/Rule Code 🔍

Coupon Name	Coupon Rule Code	Type	Coupon Content	Approval Status	Rule Status	Coupon Validity Type	Effective Time	Expiry Time	Validity Day(s) (Effective after N day(s))	Operation
free coffee	2021120600002	Redeem coupon	Redeem products without threshold	Approved	List	Fixed Date Range			1	Copy Unlist Increase
20% discount coupon	2021120600001	Discount Coupon	Without threshold get 8 Discount	Approved	List	Fixed Date Range			1	Copy Unlist Increase
2022-coupon rule test	2021120100001	Cash Back Coupon	Deduct without threshold 10 Yuan	Under Approval	Draft	Fixed Duration	01/12/2021 0:00 A M	01/11/2022 11:59 P M		Copy Approve
Black Friday-Redeem	2021112500003	Redeem coupon	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
Black Friday-20% discount coupon	2021112500002	Discount Coupon	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 can 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 coupon	Orders over 50 Redeem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
Birthday 150 minus 25 discount coupons	2021111800002	Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Range			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

Home > Coupons > Rules > Create

**Basic Info**

\* Coupon Name:

Total inventory:

\* Loyalty Program:

Cost Center:

Cost Expense: Total Cost  Yuan Used for calculating verification cost

Threshold for use: ☒ No threshold for use  
☐ Orders over  Usable for xxx yuan

\* Coupon Content: Coupon Content  Yuan

Issue Method: ☐ Public Receiving Tick it then coupons will show in the detail pages for customers to receive by themselves  
☐ Campaign Coupon Tick it then allow to be selected issuing coupon by campaign owners

Instructions:

**Use Rule**

\* Validity: ☒ Fixed Date Range ☐ Fixed Duration ☐ Effective Date-Expiry Date

## Step 4: Complete the creation of coupon rules

**Techsun** SuperAdmin

Home > Coupons > Rules > Create

**Cash Back Coupon**  
Eg. Deduct 20 yuan for each 100 yuan

**Discount Coupon**  
Eg. Get 20% off for orders over 100 yuan

**Redeem Coupon**  
Eg. Redeem products for orders over 100 yuan

Coupon Name/Rule Code

Coupon Name	Coupon Rule Code	Type	Coupon Content	Approval Status	Rule Status	Coupon Validity Type	Effective Time	Expiry Time	Validity Day(s) (Effective after N day(s))	Operation
free coffee	2021120600002	Redeem coupon	Redeem products without threshold	Approved	List	Fixed Date Range			1	Copy Unlist Increase
20% discount coupon	2021120600001	Discount Coupon	Without threshold get 8 Discount	Approved	List	Fixed Date Range			1	Copy Unlist Increase
2022-coupon rule test	2021121000001	Cash Back Coupon	Deduct without threshold 10 Yuan	Under Approval	Draft	Fixed Duration	01/12/2021 0:00 A M	01/11/2022 11:59 P M		Copy Approve
Black Friday-Redeem	2021112500003	Redeem coupon	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
Black Friday-20% discount coupon	2021112500002	Discount Coupon	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 can 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	2021110900001	Redeem coupon	Orders over 50 Redeem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
Birthday 150 minus 25 discount coupons	2021110800002	Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Range			1	Copy Unlist Increase

Total 12 piece(s) of data

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

**Techsun** SuperAdmin ▾

Home Analytics Customers Membership Marketing **Coupons**

**Rules** Records Transfer Records Messaging Orders Settings

**Cash Back Coupon**  
Eg: Deduct 20 yuan for each 100 yuan  
[Create Now](#)

**Discount Coupon**  
Eg: Get 20% off for orders over 100 yuan  
[Create Now](#)

**Redeem Coupon**  
Eg: Redeem products for orders over 100 yuan  
[Create Now](#)

Coupon Name/Rule Code 🔍

Coupon Name	Coupon Rule Code	Type	Coupon Content	Approval Status	Rule Status	Coupon Validity Type	Effective Time	Expiry Time	Validity Day(s) (Effective after N day(s))	Operation
free coffee	2021120600002	Redeem coupon	Redeem products without threshold	Approved	List	Fixed Date Range			1	Copy Unlist Increase
20% discount coupon	2021120600001	Discount Coupon	Without threshold get 8 Discount	Approved	List	Fixed Date Range			1	Copy Unlist Increase
2022-coupon rule test	2021120100001	Cash Back Coupon	Deduct without threshold 10 Yuan	Under Approval	Draft	Fixed Duration	01/12/2021 0:00 A M	01/11/2022 11:59 P M		Copy Approve
Black Friday-Redeem	2021112500003	Redeem coupon	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
Black Friday-20% discount coupon	2021112500002	Discount Coupon	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 can 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 coupon	Orders over 50 Redeem product	Approved	List	Fixed Duration	19/11/2021 0:00 A M	31/12/2021 11:59 P M		Copy Unlist Increase
Birthday 150 minus 25 discount coupons	2021111800002	Cash Back Coupon	Orders over 150 can save 25 Yuan	Approved	List	Fixed Date Range			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 ▾

Home > Coupons > Rules > Details

Basic Info Analytics Coupon List Additional Issue Record Approval Record

**Convention**

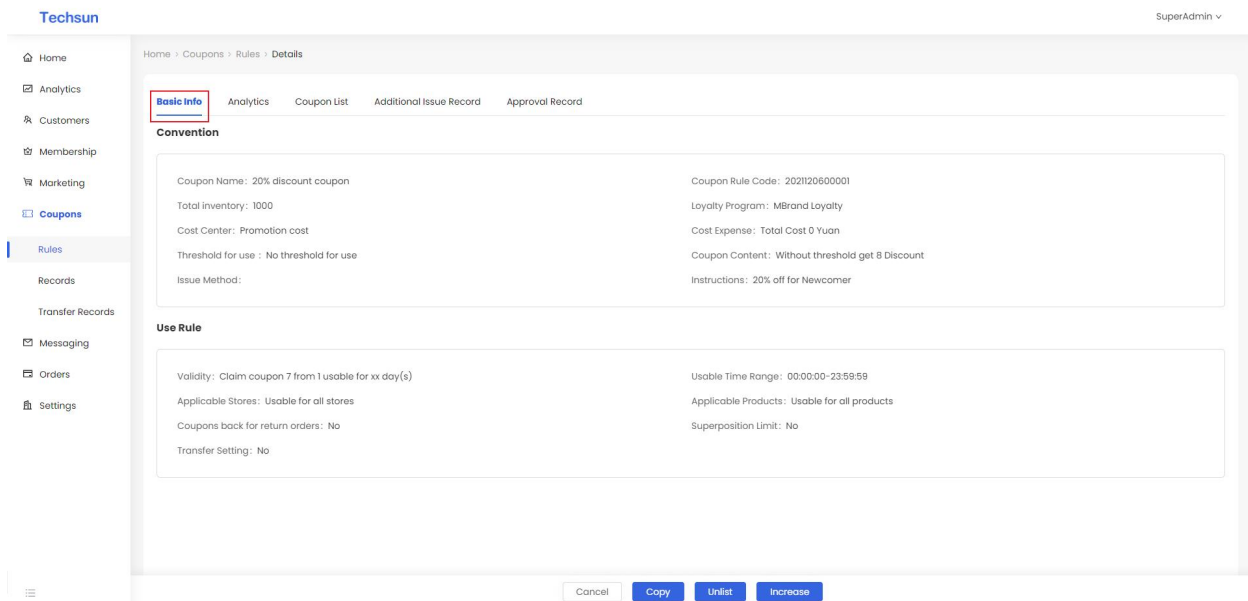
Coupon Name: 20% discount coupon	Coupon Rule Code: 2021120600001
Total inventory: 1000	Loyalty Program: MBrand Loyalty
Cost Center: Promotion cost	Cost Expense: Total Cost 0 Yuan
Threshold for use: No threshold for use	Coupon Content: Without threshold get 8 Discount
Issue Method:	Instructions: 20% off for Newcomer

**Use Rule**

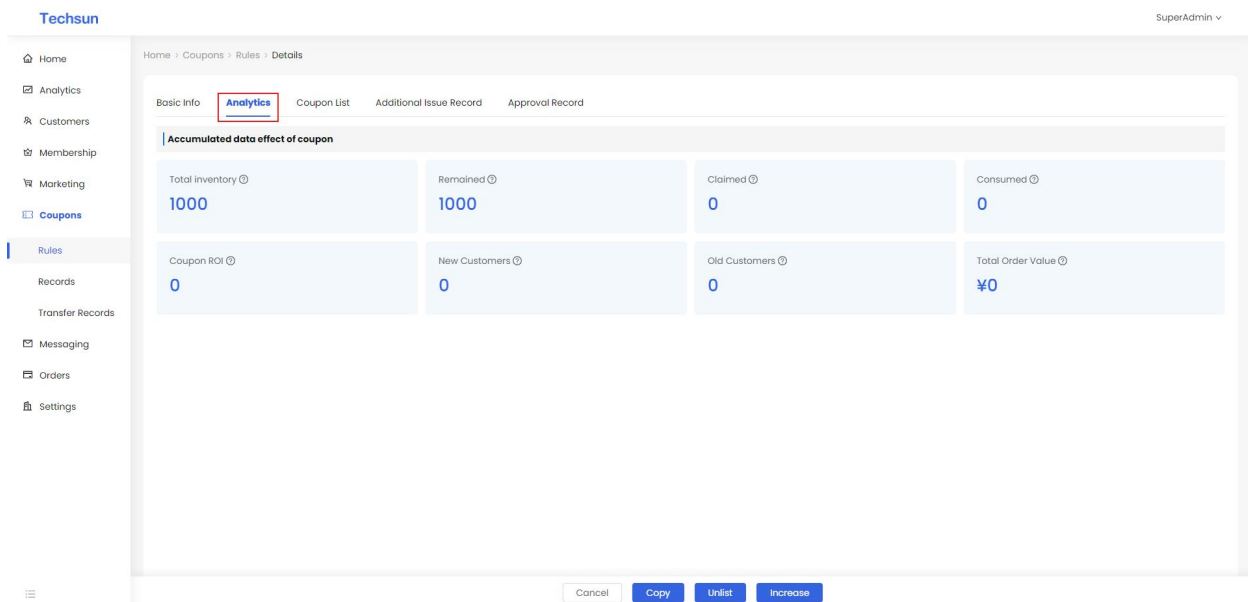
Validity: Claim coupon 7 from 1 usable for xx day(s)	Usable Time Range: 00:00:00-23:59:59
Applicable Stores: Usable for all stores	Applicable Products: Usable for all products
Coupons back for return orders: No	Superposition Limit: No
Transfer Setting: No	

Cancel Copy Unlist Increase

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



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

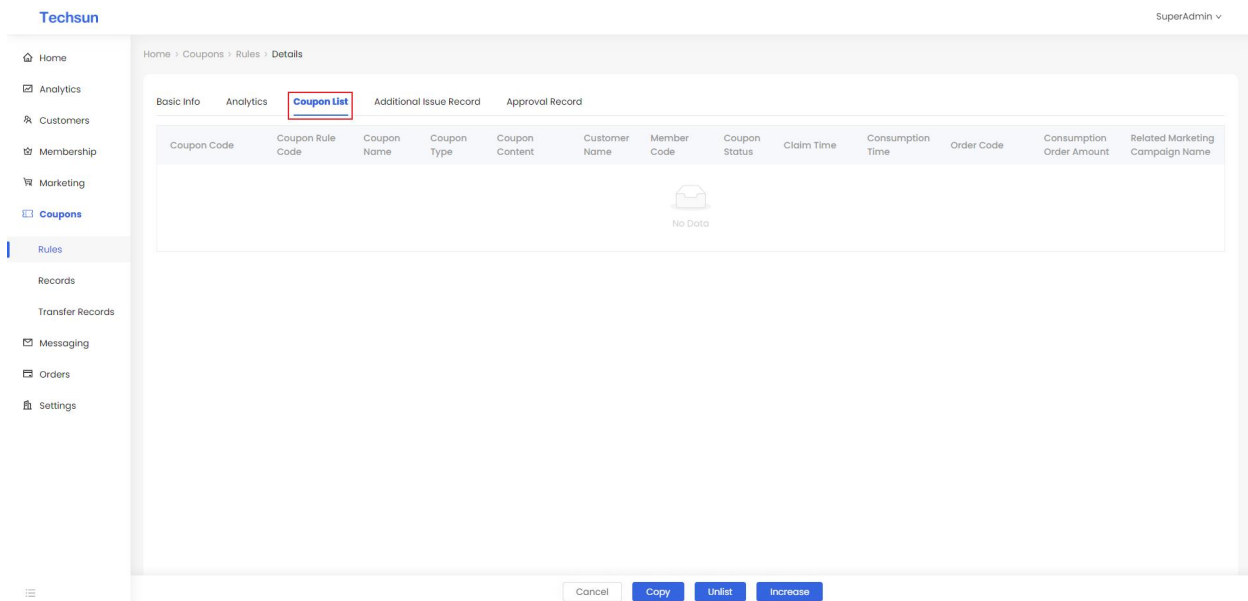


Instruction Manual:

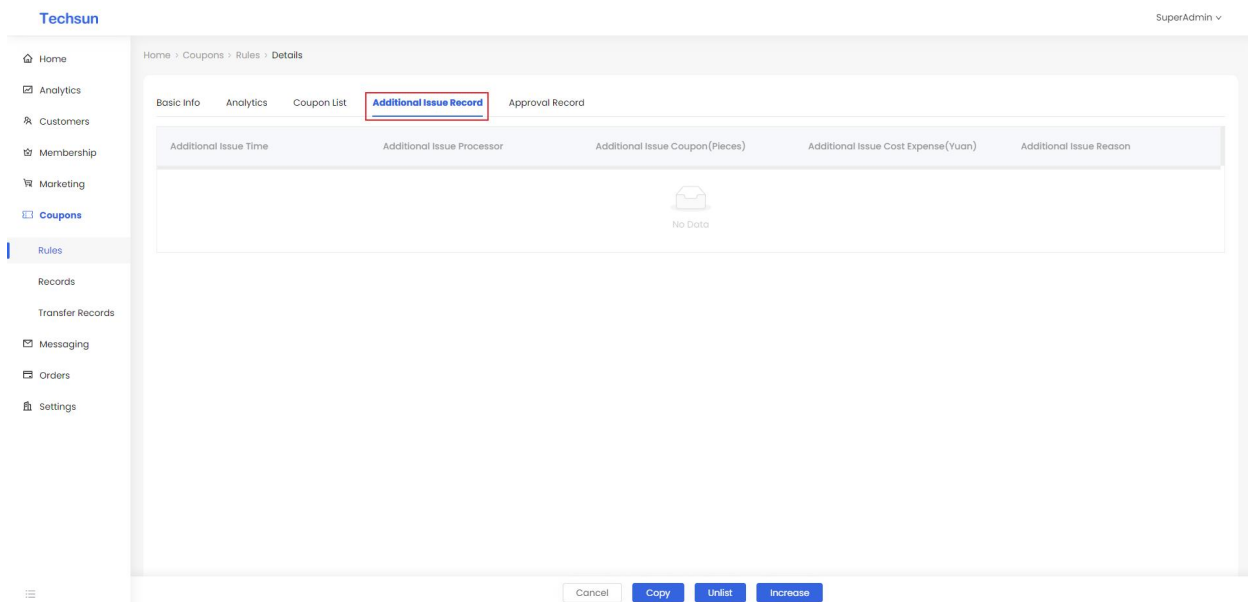
Module	Element	Element	Rule description
--------	---------	---------	------------------

	name	type	
Cumulative data effect	Total inventory	Numerical value	Coupon total inventory
	Remaining amount	Numerical value	Coupon inventory remaining
	Number of recipients	Numerical value	Number of coupons received
	Number of users	Numerical value	Number of people using coupons
	Coupon ROI	Numerical value	The actual payment amount/coupon amount of the order using the coupon
	Number of new customers	Numerical value	Using this coupon, the number of users who placed an order for the first time
	Number of regular customers	Numerical value	Using this coupon, the number of users who placed an order for the second time and above
	The total amount of orders	Numerical value	The total amount of actual orders purchased with coupons

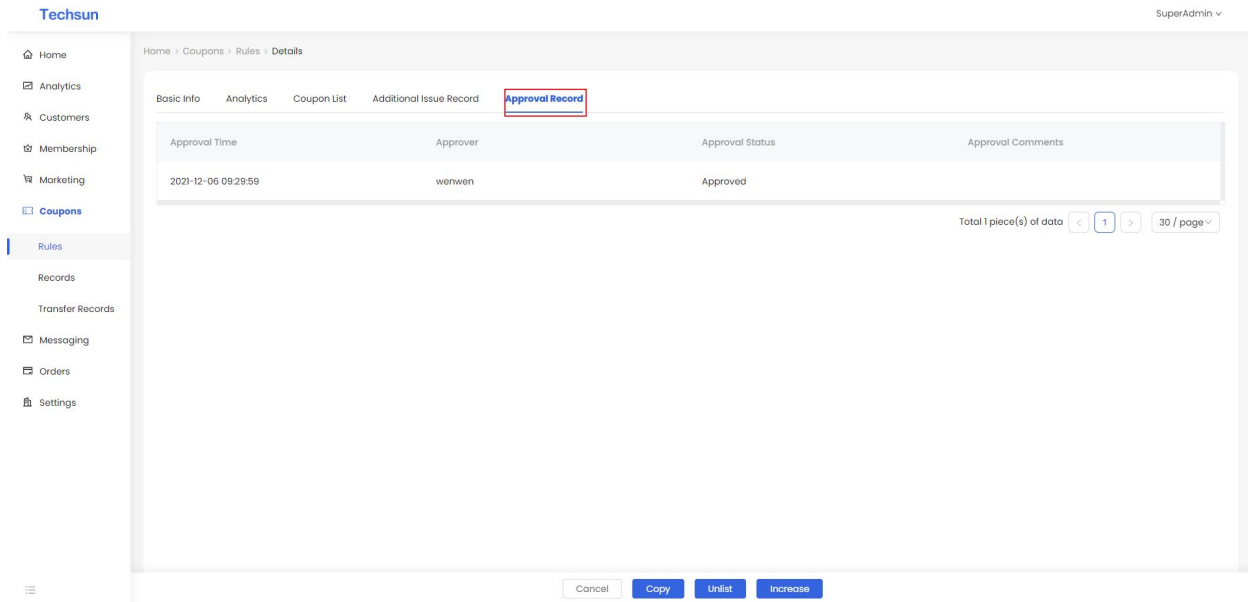
**Step 9: You can view the basic information of the coupon rules & Analytics & [coupon list] & additional issuance records & approval records**



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



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



## VIEW COUPON RECORDS

### Function Description:

- 1) All coupon records issued by the management system;

**Step 1: Select the menu bar [Coupons] → [Records] to enter the coupon view interface**



Techsun SuperAdmin

Home Analytics Customers Membership Marketing **Coupons** Rules **Records** Transfer Records Messaging Orders Settings

Search by coupon code/coupon n...

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 Marketing Campaign Name
1486912050852002	2021120100002						Expiry	02/12/2021 10:39 AM			\$0	
3484301896020437	2021120100002						Expiry	02/12/2021 10:39 AM			\$0	
4481661488561249	2021120100002						Expiry	02/12/2021 10:39 AM			\$0	
2748896346356252	2021120100002						Expiry	02/12/2021 10:39 AM			\$0	
8486171655568214	2021120100002				Gregoire Carby	1000000345	Expiry	02/12/2021 10:39 AM			\$0	
7748352863214718	2021120100002				Rosalind Abram	1000000293	Expiry	02/12/2021 10:39 AM			\$0	
8748084814115366	2021120100002				Priscilla Hughes	1000000267	Expiry	02/12/2021 10:39 AM			\$0	
6477721807932730	2021120100002				Astalos Acklin	1000000305	Expiry	02/12/2021 10:39 AM			\$0	
2747504412665881	2021120100002				Iversen Ackroyd	1000000306	Expiry	02/12/2021 10:39 AM			\$0	
1747238940443971	2021120100002				Lorraine Hall	1000000422	Expiry	02/12/2021 10:39 AM			\$0	
6468701857265193	2021120100002						Expiry	02/12/2021 10:39 AM			\$0	

Total 281 piece(s) of data 1 2 3 4 5 ... 10 > 30 / page Go to

<https://saas2022.techsun.com/pl/coupon-center/coupon-rule>

## Instruction Manual:

- 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

Home Analytics Customers Membership Marketing **Coupons** Rules **Records** Transfer Records Messaging Orders Settings

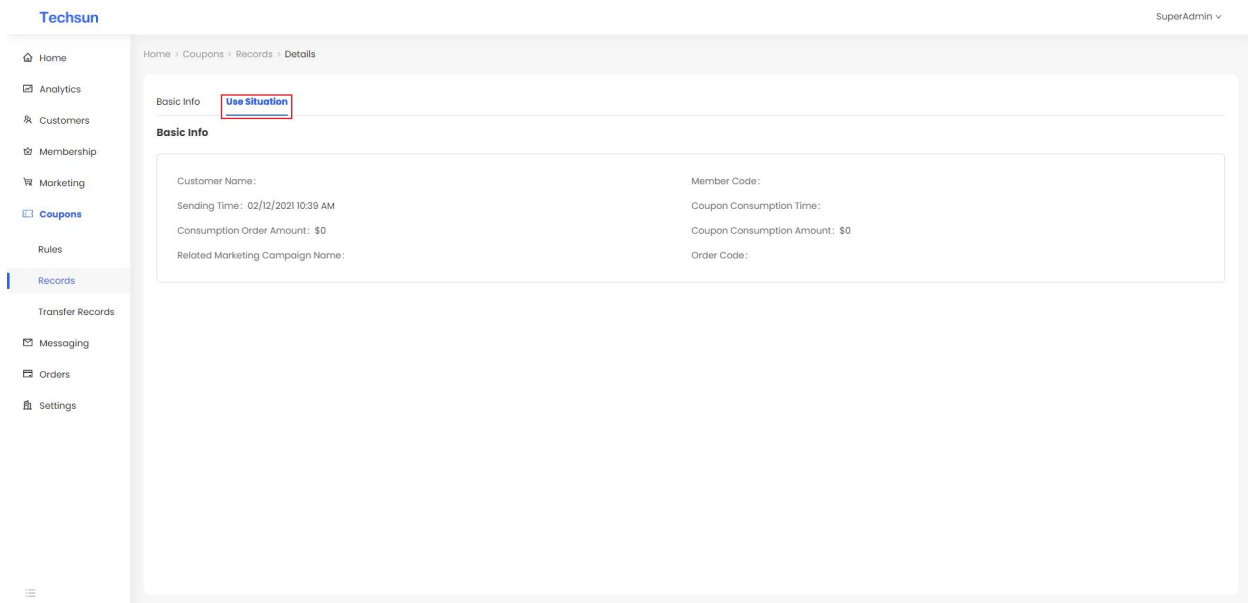
Home > Coupons > Records > Details

**Basic Info** Use Situation

**Basic Info**

Coupon Name:	Coupon Code: 2748896346356252
Coupon Rule Code: 2021120100002	Coupon Content:
Coupon Type:	Validity: 01/12/2021 0:00 AM-02/12/2021 11:58 PM
Coupon Status: Expiry	

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

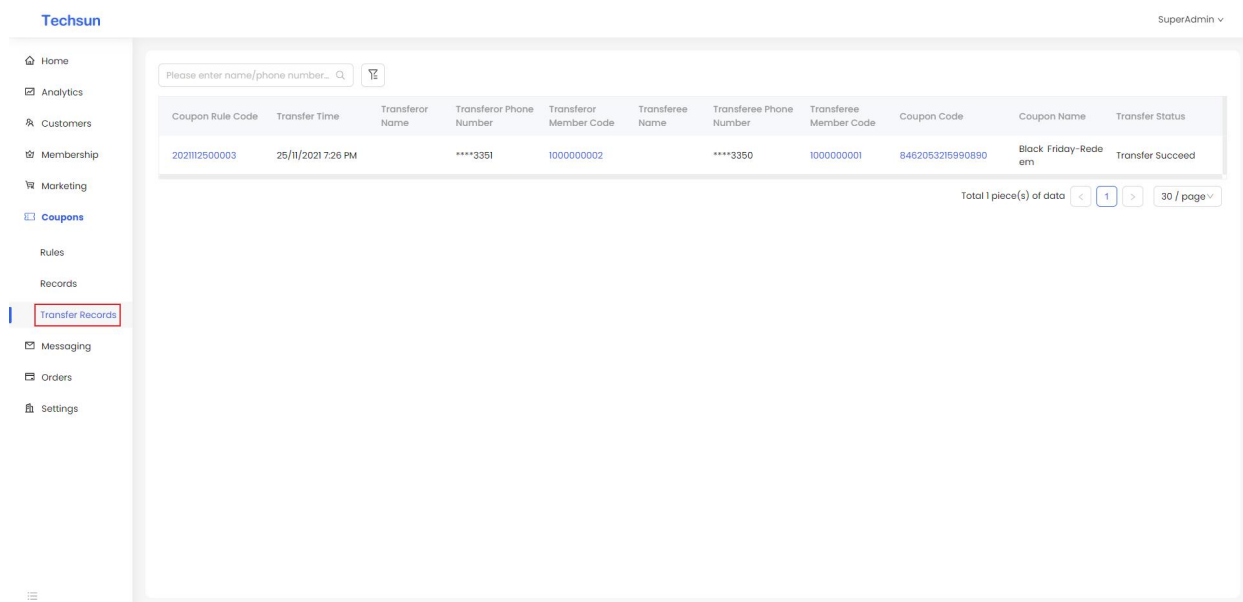


#### COUPON TRANSFER RECORD

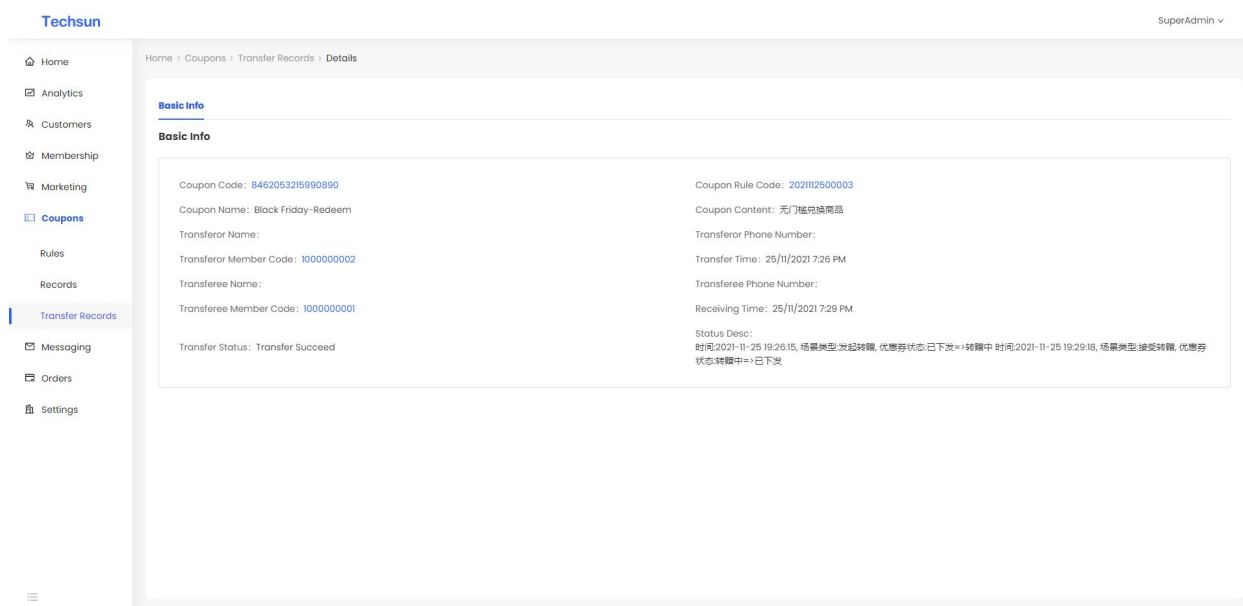
##### Function Description:

You can view the status record of the coupon transfer

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



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



## 10. MESSAGING

### WHAT IS THE MESSAGING

## Instructions for

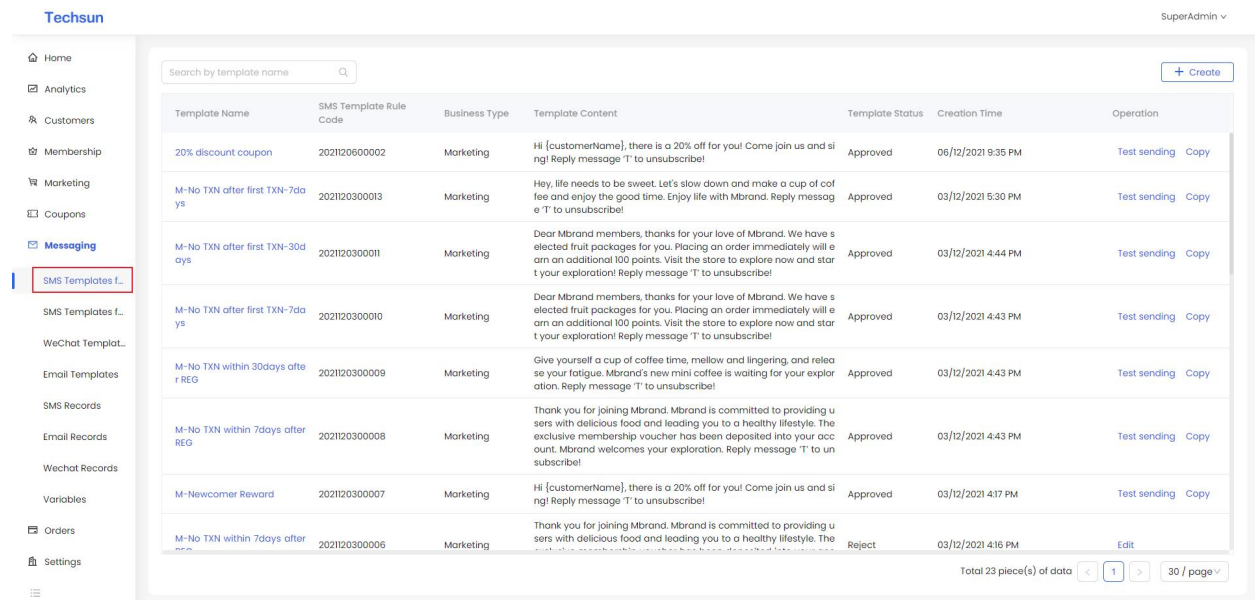
Supports docking with external SMS platforms, WeChat platforms, and email platforms. Message notifications can reach users in time for status and content updates, and users can make follow-up judgments based on received messages;

### CONFIGURE SMS TEMPLATES FOR DOMESTIC

#### Function Description:

- 1) Social Hub supports the configuration of SMS Templates for Domestics;
- 2) 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] → [SMS Templates for Domestic] to enter the SMS template view interface



#### Instruction Manual:

- 1) Support searching by template name;

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

Techsun SuperAdmin

Home Analytics Customers Membership Marketing Coupons **Messaging** SMS Templates f... SMS Templates f... WeChat Templat... Email Templates SMS Records Email Records Wechat Records Variables Orders Settings

Search by template name

[+ Create](#)

Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
20% discount coupon	2021H20600002	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and sing! Reply message 'T' to unsubscribe!	Approved	06/12/2021 9:35 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN after first TXN-7days	2021H203000013	Marketing	Hey, life needs to be sweet. Let's slow down and make a cup of coffee and enjoy the good time. Enjoy life with Mbrand. Reply message 'T' to unsubscribe!	Approved	03/12/2021 5:30 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN after first TXN-30days	2021H203000011	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have selected fruit packages for you. Placing an order immediately will earn an additional 100 points. Visit the store to explore now and start your exploration! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:44 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN after first TXN-7days	2021H203000010	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have selected fruit packages for you. Placing an order immediately will earn an additional 100 points. Visit the store to explore now and start your exploration! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN within 30days after REG	2021H203000009	Marketing	Give yourself a cup of coffee time, mellow and lingering, and release your fatigue. Mbrand's new mini coffee is waiting for your exploration. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN within 7days after REG	2021H203000008	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing users with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your account. Mbrand welcomes your exploration. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-Newcomer Reward	2021H203000007	Marketing	Hi {customerName}, there is a 20% off for you! Come join us and sing! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:17 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN within 7days after REG	2021H203000006	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing users with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your account. Mbrand welcomes your exploration. Reply message 'T' to unsubscribe!	Reject	03/12/2021 4:16 PM	<a href="#">Edit</a>

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

Techsun SuperAdmin

Home > Messaging > SMS Templates for Domestic > Create

**Basic Info**

\* Signature Name:

\* Template Name:

\* Business Type:

Template Variables:

\* Template Content:

0/500

If the length of a short message (signature + body) does not exceed 70 characters, the charge is based on one short message. If the length of a message exceeds 70 characters, the message is divided into three characters per message. Eg: If the length of a message is 150 characters, the message is divided into three 67 characters, 67 characters, and 16 characters.  
 Note: The template variable words are not counted;  
 2.The content of the SMS template can't contain the symbol of [ ] ;  
 3.illegal messages such as property, immigration, politics, sex and violence are prohibited;  
 4.It is not allowed to set links to variables (including short links), such as www.[member name].com.

[Cancel](#) [Save as draft](#) [Submit for approving](#)

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

Techsun SuperAdmin ▾

[Home](#)
[Analytics](#)
[Customers](#)
[Membership](#)
[Marketing](#)
[Coupons](#)
[Messaging](#)
[SMS Templates f...](#)
[SMS Templates f...](#)
[WeChat Templat...](#)
[Email Templates](#)
[SMS Records](#)
[Email Records](#)
[Wechat Records](#)
[Variables](#)
[Orders](#)
[Settings](#)

Search by template name

[+ Create](#)

Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
20% discount coupon	2021H20600002	Marketing	Hi [customerName], there is a 20% off for you! Come join us and sing! Reply message 'T' to unsubscribe!	Approved	06/12/2021 9:35 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN after first TXN-7days	2021H20300013	Marketing	Hey, life needs to be sweet. Let's slow down and make a cup of coffee and enjoy the good time. Enjoy life with Mbrand. Reply message 'T' to unsubscribe!	Approved	03/12/2021 5:30 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN after first TXN-30days	2021H20300011	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have selected fruit packages for you. Placing an order immediately will earn an additional 100 points. Visit the store to explore now and start your exploration! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:44 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN after first TXN-7days	2021H20300010	Marketing	Dear Mbrand members, thanks for your love of Mbrand. We have selected fruit packages for you. Placing an order immediately will earn an additional 100 points. Visit the store to explore now and start your exploration! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN within 30days after REG	2021H20300009	Marketing	Give yourself a cup of coffee time, mellow and lingering, and release your fatigue. Mbrand's new mini coffee is waiting for your exploration. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN within 7days after REG	2021H20300008	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing users with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your account. Mbrand welcomes your exploration. Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:43 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-Newcomer Reward	2021H20300007	Marketing	Hi [customerName], there is a 20% off for you! Come join us and sing! Reply message 'T' to unsubscribe!	Approved	03/12/2021 4:17 PM	<a href="#">Test sending</a> <a href="#">Copy</a>
M-No TXN within 7days after REG	2021H20300006	Marketing	Thank you for joining Mbrand. Mbrand is committed to providing users with delicious food and leading you to a healthy lifestyle. The exclusive membership voucher has been deposited into your account. Mbrand welcomes your exploration. Reply message 'T' to unsubscribe!	Reject	03/12/2021 4:16 PM	<a href="#">Edit</a>

Total 23 piece(s) of data < 1 > 30 / page ▾

## Instruction Manual:

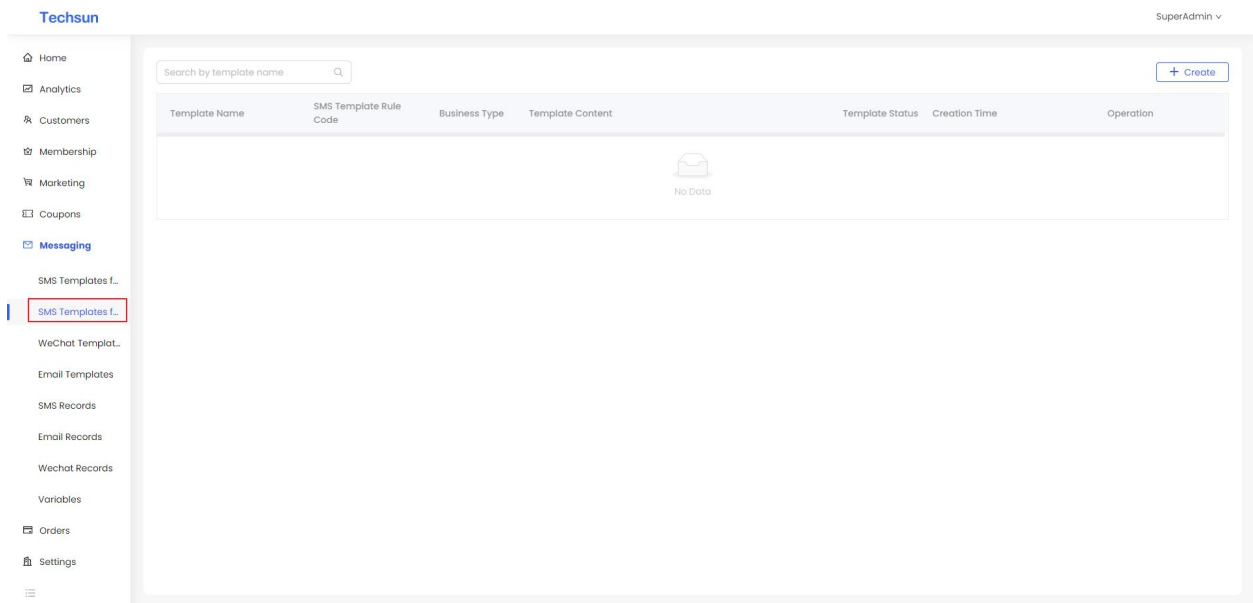
- 1) SMS Templates for Domestics support editing, copying, test sending, and deletion;

### CONFIGURE SMS TEMPLATES FOR OTHER AREAS

#### Function Description:

- 1) Social Hub supports the configuration of SMS Templates for Other Areas;
- 2) 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;

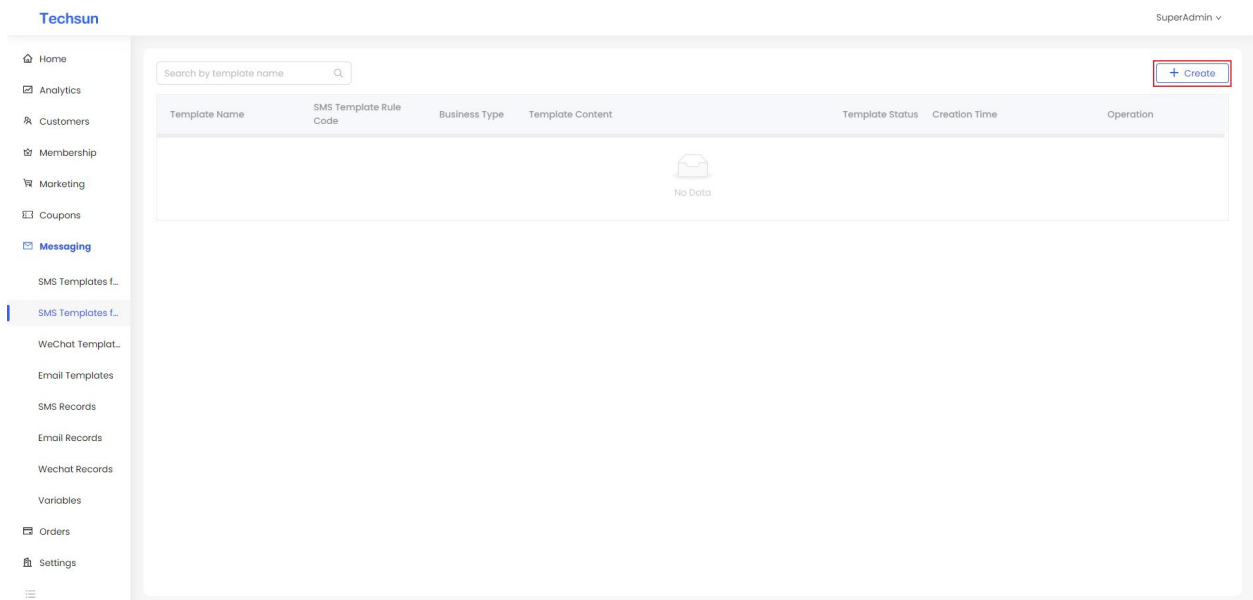
**Step 1: Select the menu bar [Messaging] → [SMS Templates for Other Areas] to enter the SMS template view interface**



## Instruction Manual:

2) Support searching by template name;

## Step 2: Click the [Create] button



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

Home > Messaging > SMS Templates for Other Areas > Create

**Basic Info**

Signature Name:

\* Template Name:

\* Business Type:

Template Variables:

\* Template Content:

0/500

If the length of pure English short message is not more than 160 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 pieces according to 153 characters/piece. Eg: if the length of a short message is 320 characters, it is divided into three pieces according to 153 characters / 153 characters / 14 characters;  
**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 be based on one short message. If the length of a message exceeds 70 characters, the message is divided into three pieces per message. Eg: if the length of a message is 150 characters, the message is divided into three 67 characters, 67 characters, and 16 characters;  
 3. The content of the SMS template can't contain the symbol of [ ] ;  
 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.

Cancel Save as draft Submit for approving

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

Search by template name

+ Create

Template Name	SMS Template Rule Code	Business Type	Template Content	Template Status	Creation Time	Operation
newproduct	2021121400001	Notification	Hi {couponName}, new product waiting for you	Draft	14/12/2021 10:13 AM	<a href="#">Edit</a> <a href="#">Copy</a> <a href="#">Delete</a>

Total 1 piece(s) of data < 1 > 30 / page

### Instruction Manual:

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

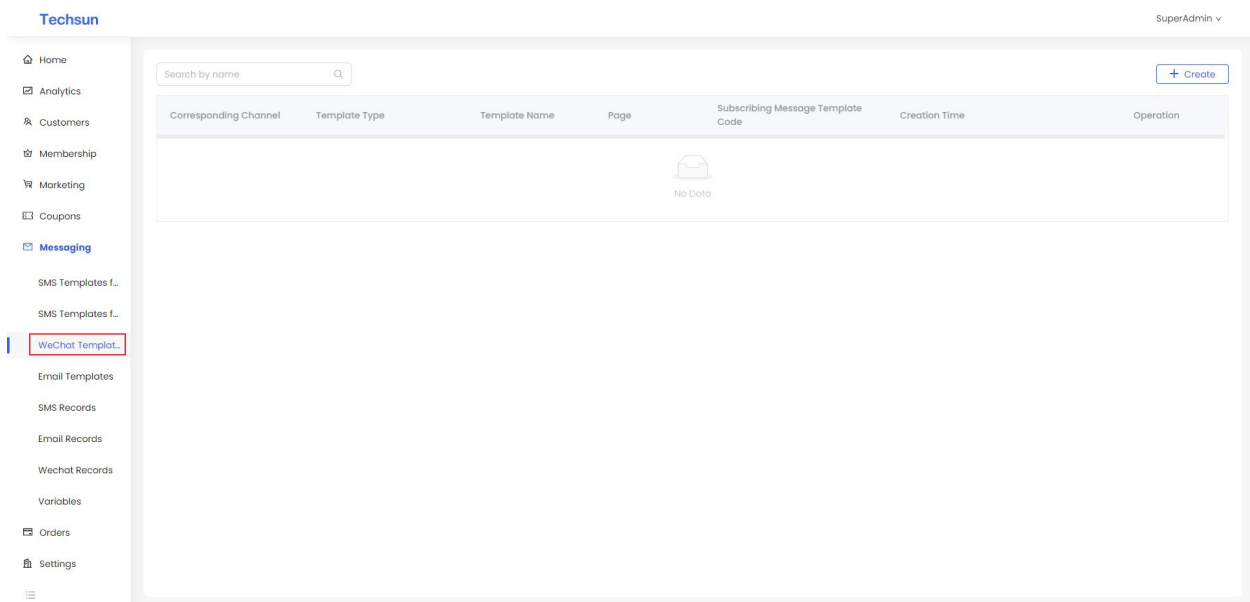


## CONFIGURE WECHAT TEMPLATES

### Function Description:

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

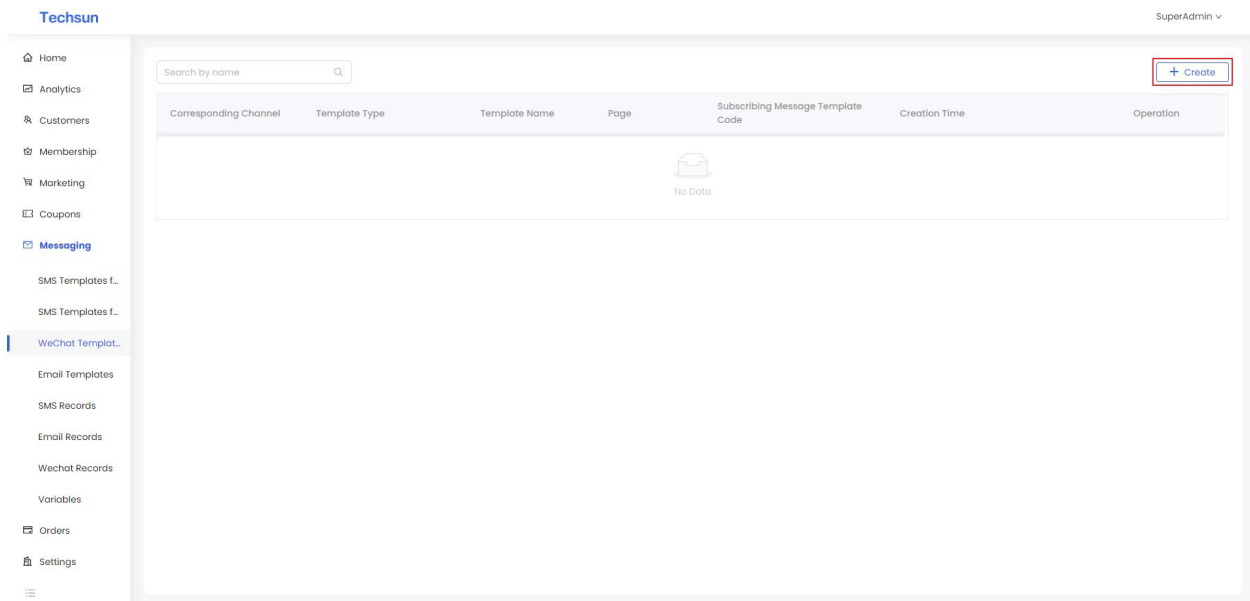
### Step 1: Select the menu bar [Messaging] → [WeChat Template] to enter the WeChat template view interface



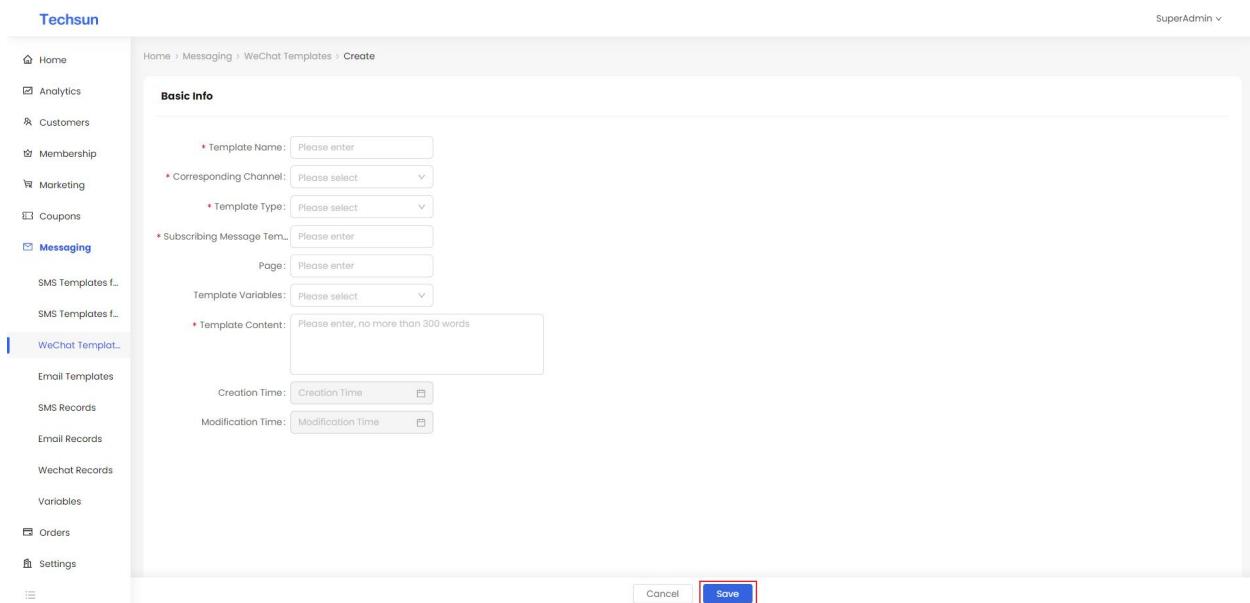
### Instruction Manual:

- 1) Support searching by template name;

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



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



**Instruction Manual:**

- 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**

## Instruction Manual:

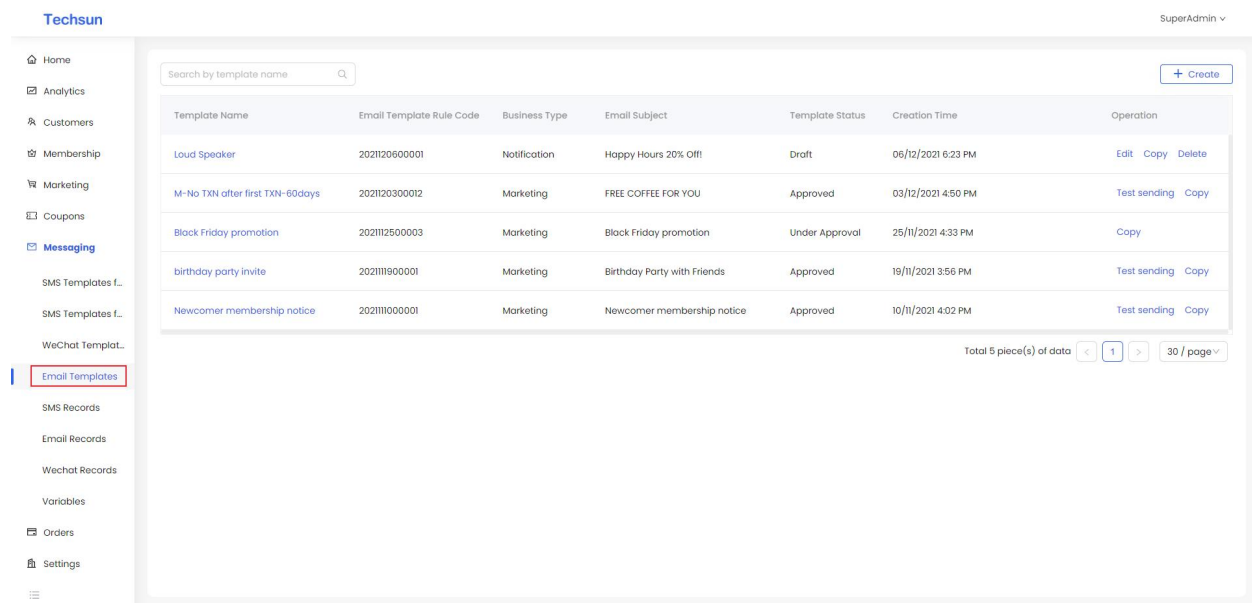
- 1) SMS template supports editing and deletion;

### CONFIGURE EMAIL TEMPLATES

#### Function Description:

- 1) Social Hub supports configuring Email Templates;
- 2) 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;

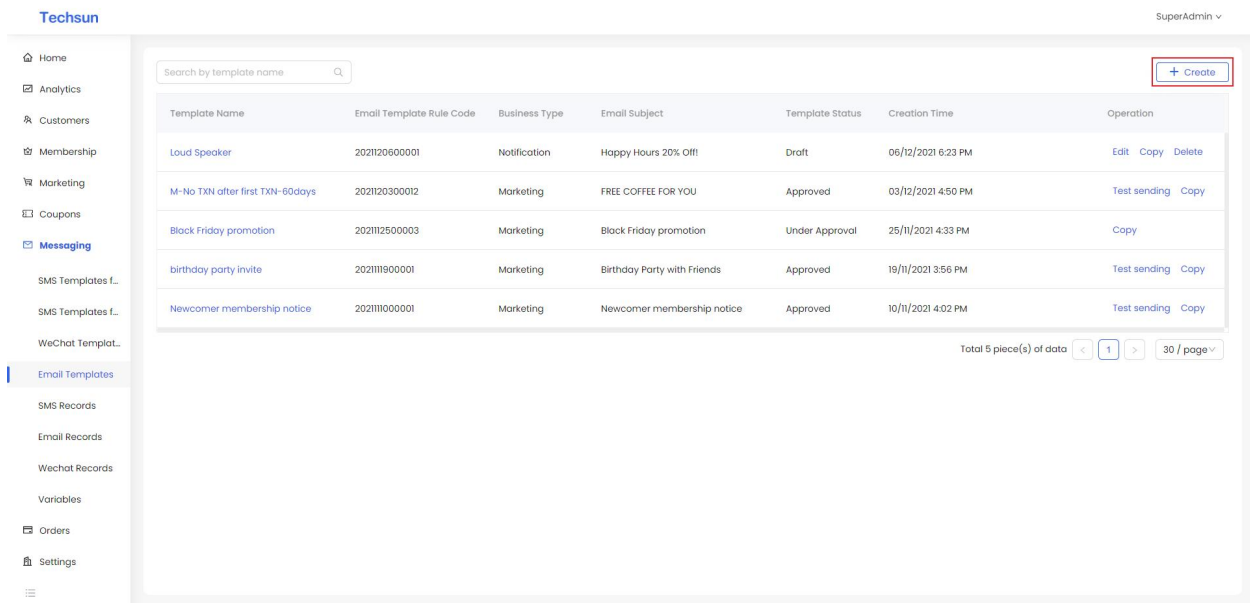
#### Step 1: Select the menu bar [Messaging] → [Email Templates] to enter the SMS template view interface



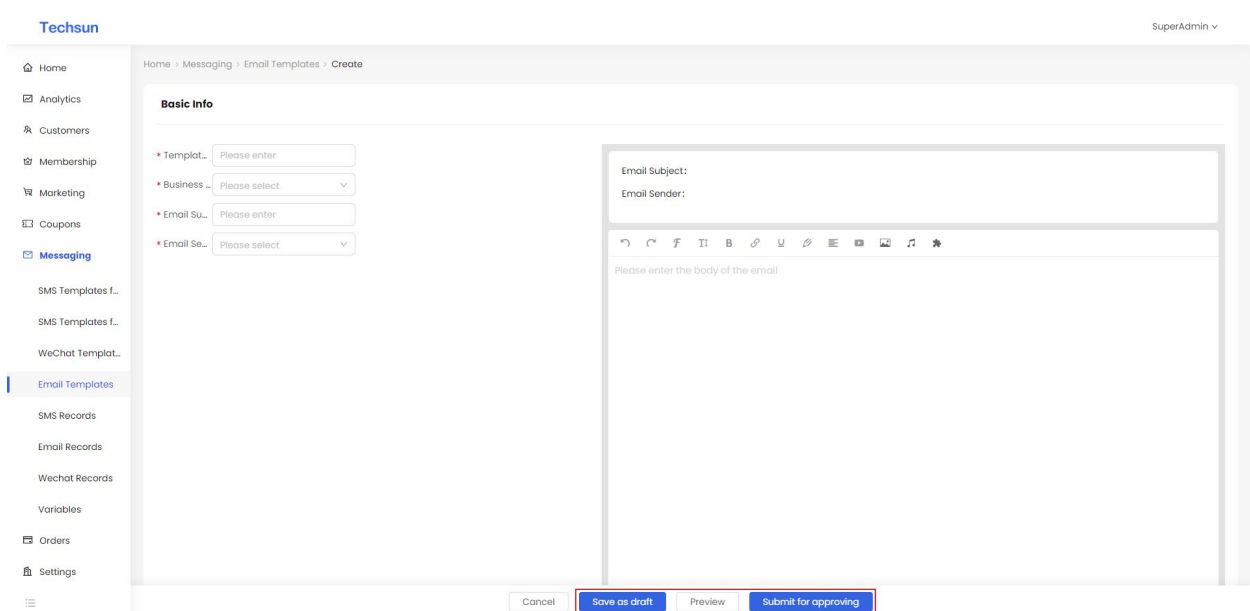
## Instruction Manual:

- 1) Support searching by template name;

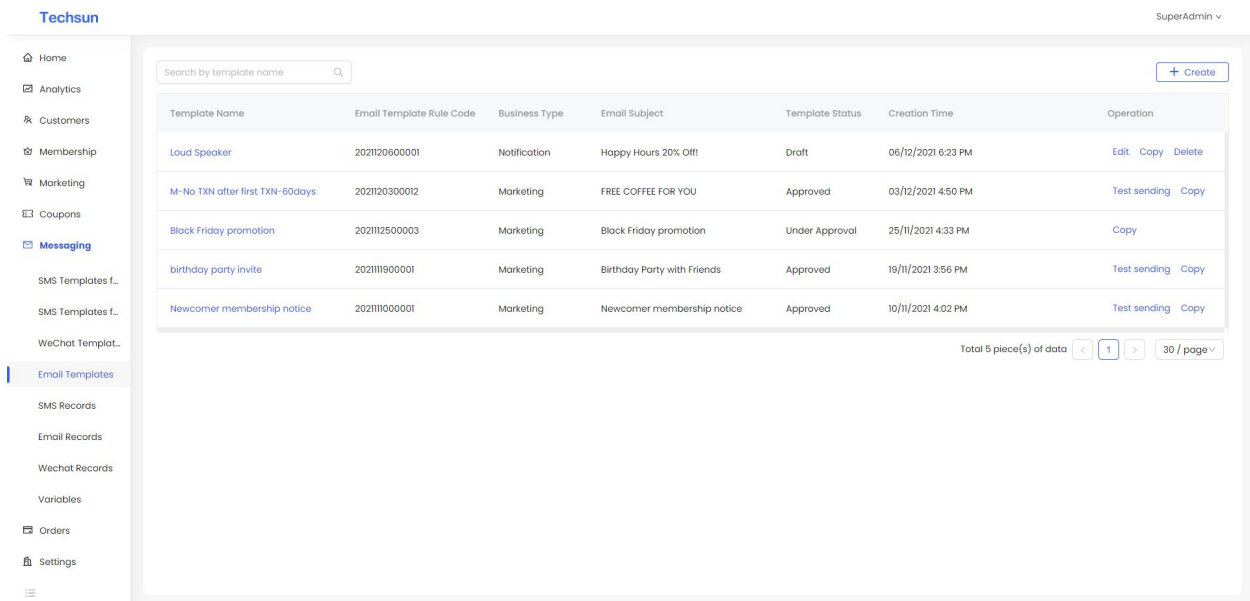
#### Step 2: Click the [Create] button



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



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



## Instruction Manual:

- 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] → [SMS Records] to enter the SMS message view interface**

**Techsun** Alewin

Home Analytics Customers Membership Marketing Coupons **Messaging** SMS Templates f... SMS Templates f... WeChat Templat... Email Templates **SMS Records** Email Records Wechat Records Variables Orders Settings

Search by phone number

Template Name	SMS Template Rule Code	SMS Type	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc
Birthday Party Promotion	2021111800002	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Carl Smith	29433ABE5B042720 E0EAB8BDE5DA74C2	1000000448	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Merry Doe	29433ABE5B042720 D097DE4A3BF06DD8	1000000397	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Peck Dads, 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!	Peck Dads	29433ABE5B042720 66FB8CA6E939D1	1000000394	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Southon Ade, 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!	Southon Ade	29433ABE5B042720 726CD367FC8B8FA5	1000000326	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Nickonov Acton, 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!	Nickonov Acton	29433ABE5B042720 39D65808CB242ED2	1000000314	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Easter Tayl, 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!	Easter Tayl	29433ABE5B042720 E0EAB8BDE5DA74C2	1000000448	19/11/2021 4:08 PM	Submission failed	signature for signature is n

Total 415 piece(s) of data < 1 2 3 4 5 ... 14 > 30 / page Go to

## Instruction Manual:

- 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

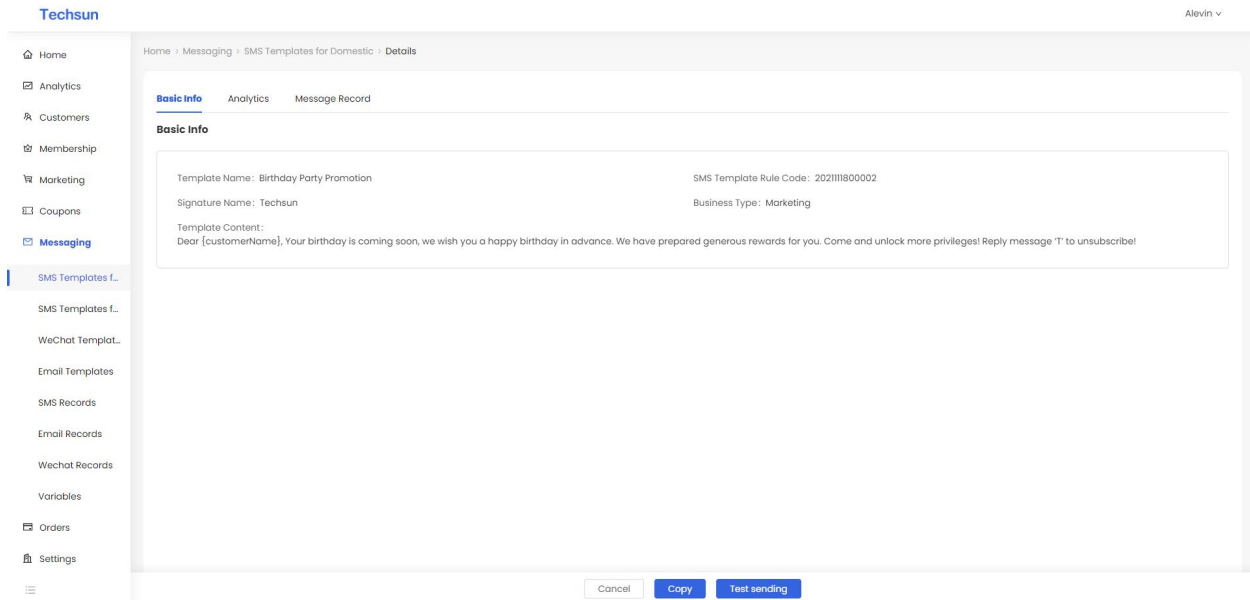
**Techsun** Alewin

Home Analytics Customers Membership Marketing Coupons **Messaging** SMS Templates f... SMS Templates f... WeChat Templat... Email Templates **SMS Records** Email Records Wechat Records Variables Orders Settings

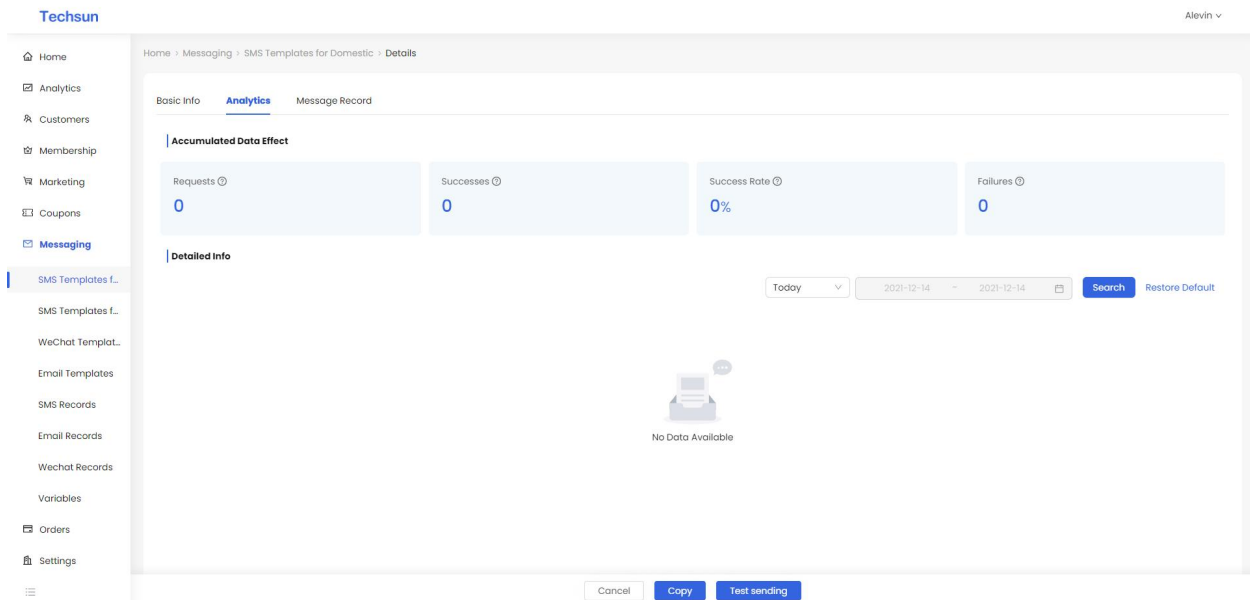
Search by phone number

Template Name	SMS Template Rule Code	SMS Type	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc
Birthday Party Promotion	2021111800002	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Carl Smith	29433ABE5B042720 E0EAB8BDE5DA74C2	1000000448	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Merry Doe	29433ABE5B042720 D097DE4A3BF06DD8	1000000397	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Peck Dads, 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!	Peck Dads	29433ABE5B042720 66FB8CA6E939D1	1000000394	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Southon Ade, 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!	Southon Ade	29433ABE5B042720 726CD367FC8B8FA5	1000000326	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Nickonov Acton, 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!	Nickonov Acton	29433ABE5B042720 39D65808CB242ED2	1000000314	19/11/2021 4:08 PM	Submission failed	signature for signature is n
Birthday Party Promotion	2021111800002	Domestic SMS	Marketing	Dear Easter Tayl, 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!	Easter Tayl	29433ABE5B042720 E0EAB8BDE5DA74C2	1000000448	19/11/2021 4:08 PM	Submission failed	signature for signature is n

Total 415 piece(s) of data < 1 2 3 4 5 ... 14 > 30 / page Go to



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



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

Techsun

Home

Analytics

Customers

Membership

Marketing

Coupons

Messaging

SMS Templates f..

SMS Templates f..

WeChat Templat..

Email Templates

SMS Records

Email Records

Wechat Records

Variables

Orders

Settings

Home > Messaging > SMS Templates for Domestic > Details

Basic Info

Analytics

Message Record

Template Name	SMS Template Rule Code	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc	Market Campaign
Birthday Party Promotion	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Carl Smith	29433ABE5B042720E0EA881DE5DA74C2	1000000448	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Merry Doe	29433ABE5B042720D097DE4A3BF06DD8	1000000397	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	2021111800002	Marketing	Dear Peck Dads, 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!	Peck Dads	29433ABE5B04272066FFB8CA6E9391D1	1000000394	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	2021111800002	Marketing	Dear Southon Ade, 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!	Southon Ade	29433ABE5B042720725CD367FC8B8FA5	1000000326	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	2021111800002	Marketing	Dear Nickonov Acton, 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!	Nickonov Acton	29433ABE5B04272039D65808CB242ED2	1000000314	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday

Total 163 piece(s) of data

<

1

2

3

4

5

6

>

30 / page

Go to

Cancel

Copy

Test sending

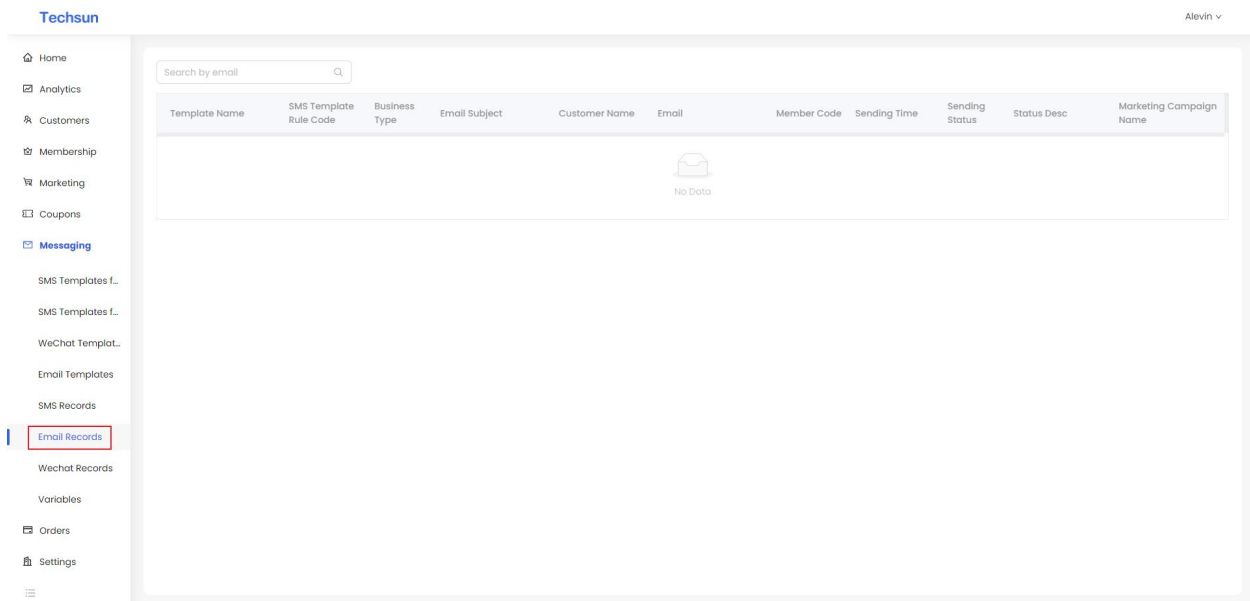
## CHECK MAIL RECORDS

### Function Description:

- 1) Manage all email messages triggered by the system;

**Step 1: Select the menu bar [Messaging] → [Email Records] to enter the mail message view interface**

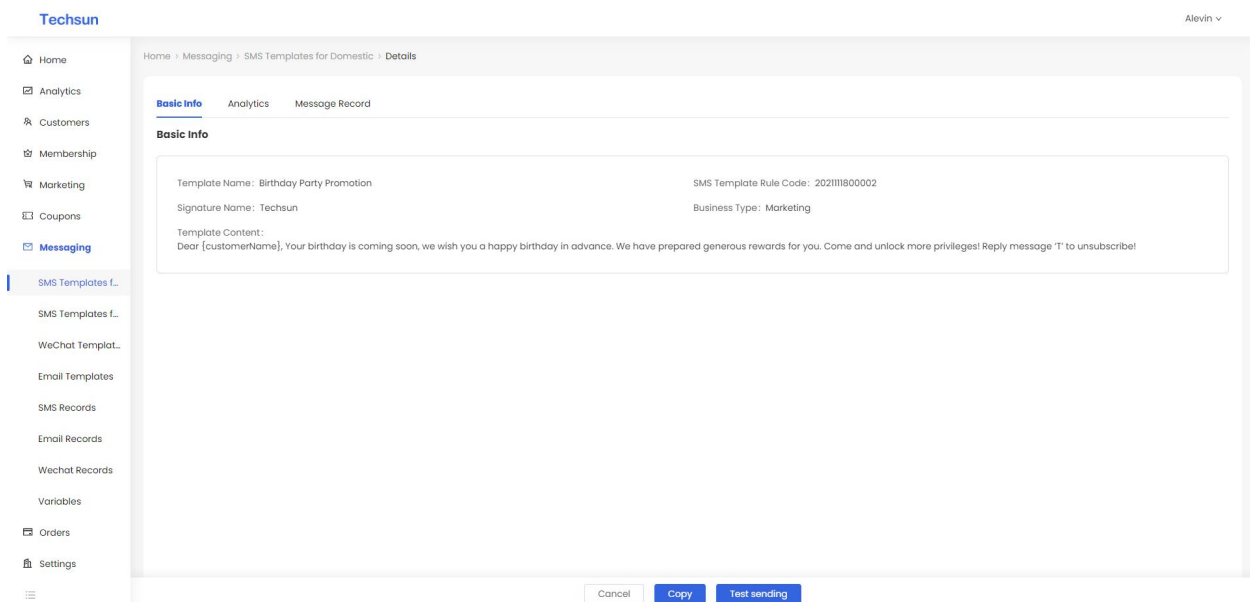




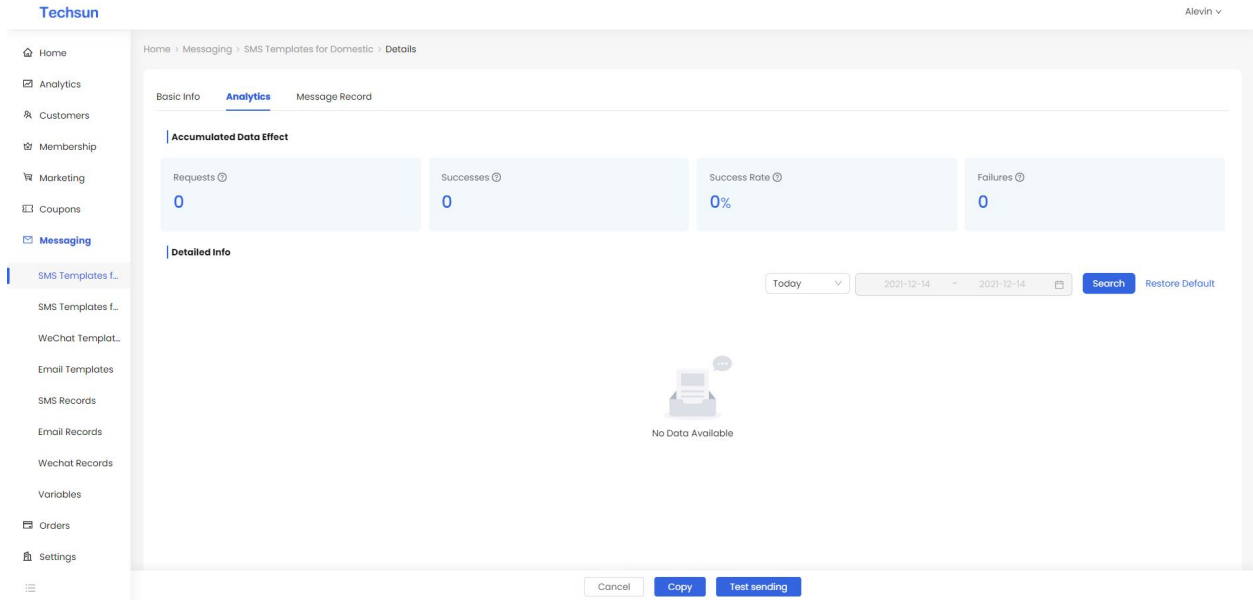
## Instruction Manual:

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



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



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

The screenshot shows the Techsun Social Hub interface. The sidebar on the left includes navigation options: Home, Analytics, Customers, Membership, Marketing, Coupons, Messaging, SMS Templates f..., WeChat Templat..., Email Templates, SMS Records, Email Records, Wechat Records, Variables, Orders, and Settings. The main content area is titled 'Home > Messaging > SMS Templates for Domestic > Details'. It features a 'Basic Info' tab, an 'Analytics' tab, and a 'Message Record' tab (selected). The 'Message Record' tab displays a table with columns: Template Name, SMS Template Rule Code, Business Type, Template Content, Customer Name, Phone Number, Member Code, Sending Time, Sending Status, Status Desc, and Market/Campaign. The table contains five rows of data for 'Birthday Party Promotion' templates. At the bottom, there is a pagination bar showing 'Total 163 piece(s) of data' and a 'Go to' field. At the bottom of the interface, there are buttons for 'Cancel', 'Copy', and 'Test sending'.

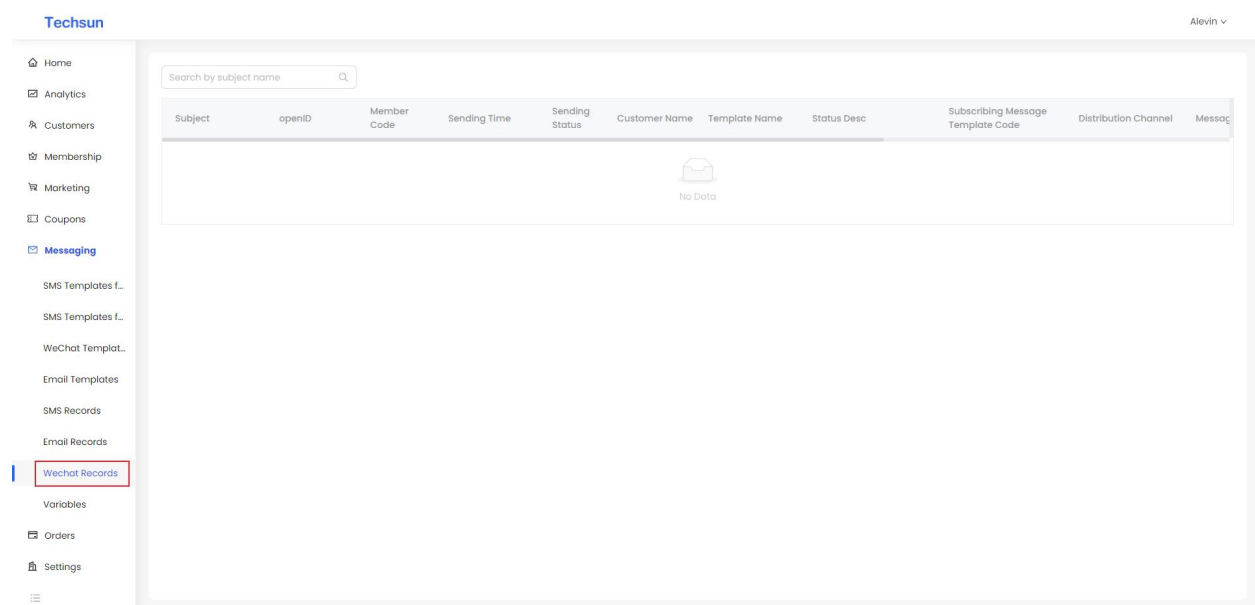
Template Name	SMS Template Rule Code	Business Type	Template Content	Customer Name	Phone Number	Member Code	Sending Time	Sending Status	Status Desc	Market/Campaign
Birthday Party Promotion	2021111800002	Marketing	Dear Carl Smith, Your birthday is coming soon, we wish you a happy birthday in advance. We have prepared generous rewards for you. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Carl Smith	29433ABE5B042720E0EAB88IDE5DA74C2	1000000448	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Merry Doe	29433ABE5B042720D097DE4A3BF05DD8	1000000397	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	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. Come and unlock more privileges! Reply message 'T' to unsubscribe!	Peck Dods	29433ABE5B04272066F8B8CA6E939D1	1000000394	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	2021111800002	Marketing	Dear Southon Ade, 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!	Southon Ade	29433ABE5B042720725CD367FCBBFA5	1000000326	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday
Birthday Party Promotion	2021111800002	Marketing	Dear Nickonov Acton, 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!	Nickonov Acton	29433ABE5B04272039D65808CB242ED2	1000000314	19/11/2021 4:08 PM	Submitted successfully	signature format is incorrect or signature is not approved	Birthday

## CHECK WECHAT RECORDS

**Function Description:**

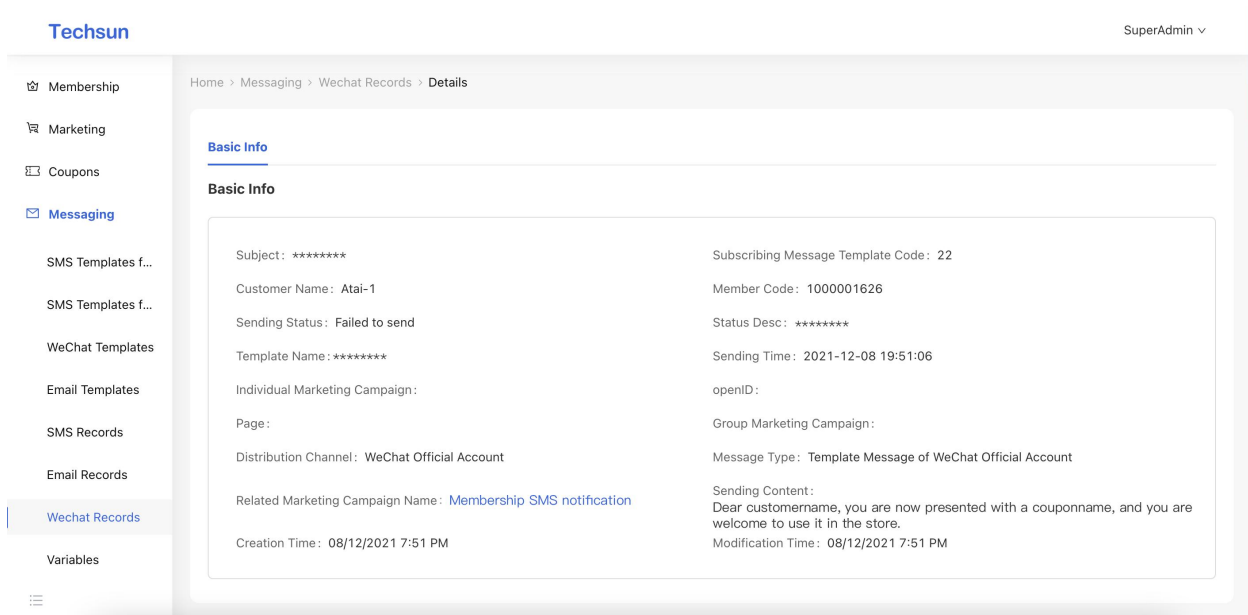
- 1) Manage all WeChat messages triggered by the system;

**Step 1: Select the menu bar [Messaging] → [Wechat Records] to enter the WeChat message view interface**

**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**



## 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] → the Secondary menu bar [orders] to enter the order view interface

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Home Analytics Customers Membership Marketing Coupons Messaging **Orders**

Store Groups Stores Product Groups Product Categor... Products Payment Methods Settings

Search by order ID  + Create

Order Code	Customer Name	Member Code	Order Type	Order Direction	Source Channel	Order Date	Store	Store Code	Receivable Amount(Facevalue)	Total Discount Amount(Discount)	Receivable Net V
order2030000804	Witney Cardwell	1000000352	Take-out	Standard Order	NEWPOS	19/11/2021 9:52 AM	SG West Store	SG West	\$19.00	\$0.00	\$19.00
order2030000803	Chapdelaine Cardan	1000000351	Take-out	Standard Order	NEWPOS	19/11/2021 9:52 AM	SG West Store	SG West	\$19.00	\$0.00	\$19.00
order2030000802	Presley Cardinal	1000000350	Take-out	Standard Order	Shopify	19/11/2021 9:52 AM	SG West Store	SG West	\$32.00	\$0.00	\$32.00
order2030000801	Pandya Ditsworth	1000000373	Take-out	Standard Order	NEWPOS	19/11/2021 9:52 AM	SG West Store	SG West	\$57.00	\$0.00	\$57.00
order2030000800	Bannon Ditch	1000000372	Take-out	Standard Order	Shopify	19/11/2021 9:52 AM	SG West Store	SG West	\$32.00	\$0.00	\$32.00
order2030000799	Majola Diss	1000000371	Take-out	Standard Order	JD Flagship Shop	19/11/2021 9:52 AM	SG West Store	SG West	\$72.00	\$0.00	\$72.00
order2030000798	Nettles Dison	1000000370	Take-out	Standard Order	Shopify	19/11/2021 9:51 AM	SG West Store	SG West	\$16.00	\$0.00	\$16.00
order2030000797	Prewitt Disney	1000000369	Take-out	Standard Order	JD Flagship Shop	19/11/2021 9:51 AM	SG West Store	SG West	\$18.00	\$0.00	\$18.00
order2030000796	Loi Covell	1000000368	Take-out	Standard Order	Shopify	19/11/2021 9:51 AM	SG West Store	SG West	\$16.00	\$0.00	\$16.00
order2030000795	Prokes Covell	1000000367	Take-out	Standard Order	Shopify	19/11/2021 9:51 AM	SG West Store	SG West	\$36.00	\$0.00	\$36.00
order2030000794	Gorelis Cove	1000000366	Take-out	Standard Order	JD Flagship Shop	19/11/2021 9:51 AM	SG West Store	SG West	\$48.00	\$0.00	\$48.00

Total 428 piece(s) of data 1 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 ▾

Home > Orders > Orders > Details

**Basic info** Order Details Point Record

**Convention**

Order Code: order2030000804	Order Direction: Standard Order
Customer Name: Witney Cardwell	Member Code: 1000000352
Employee Account:	Source Channel: NEWPOS
Order Code of Source Channel: order2030000804	Order Type: Take-out
Order Date: 19/11/2021 9:52 AM	Pay Time:
Store Code: SG West	Store: SG West Store
Salesperson Code:	Product Quantity: 1
Number of Customers:	Original Order Code:
Remark:	Order Status:

**Amount**

Sales Amount in Original Price: \$19.00	Receivable Amount(Facevalue): \$19.00
Coupon Amount: \$0.00	Discount Amount: \$0.00
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 ▾

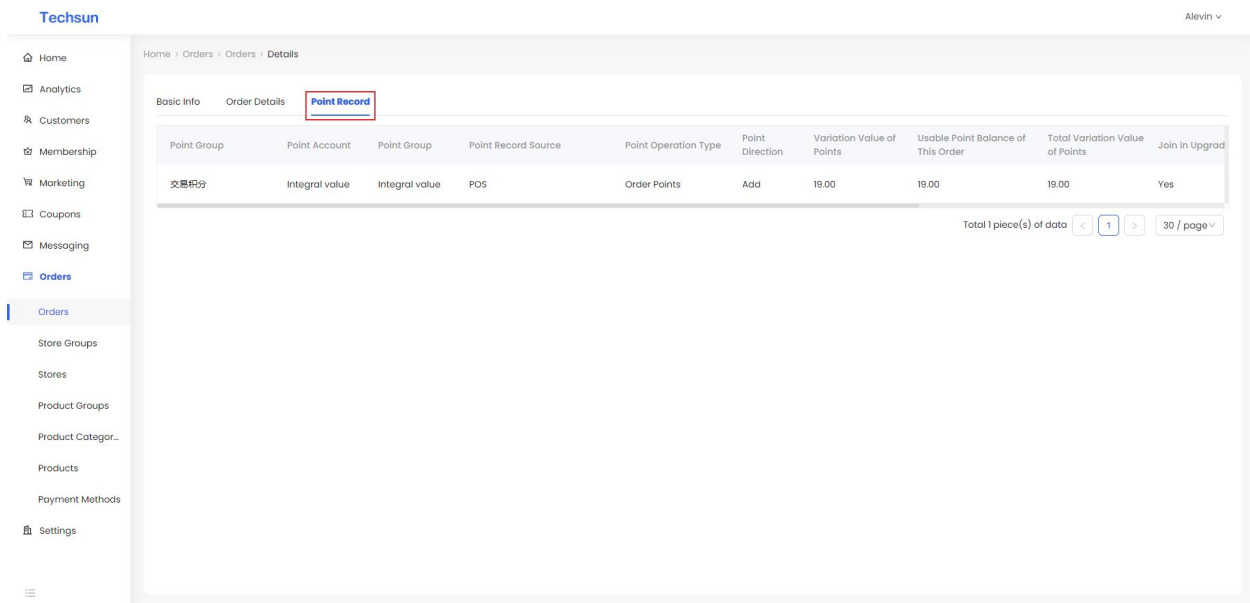
Home > Orders > Orders > Details

Basic info **Order Details** Point Record

Order Code	Product Code	Product Title	Quantity	Receivable Amount(Facevalue)	Total Discount Amount(Discount)	Received Amount(Operation Net Value)	Calculate point amount	Creation Time
order2030000804	PR1000099	Reduced Sugar	1	\$19.00	\$0.00	\$19.00	\$19.00	19/11/2021 10:01 AM

Total 1 piece(s) of data < 1 > 30 / page ▾

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

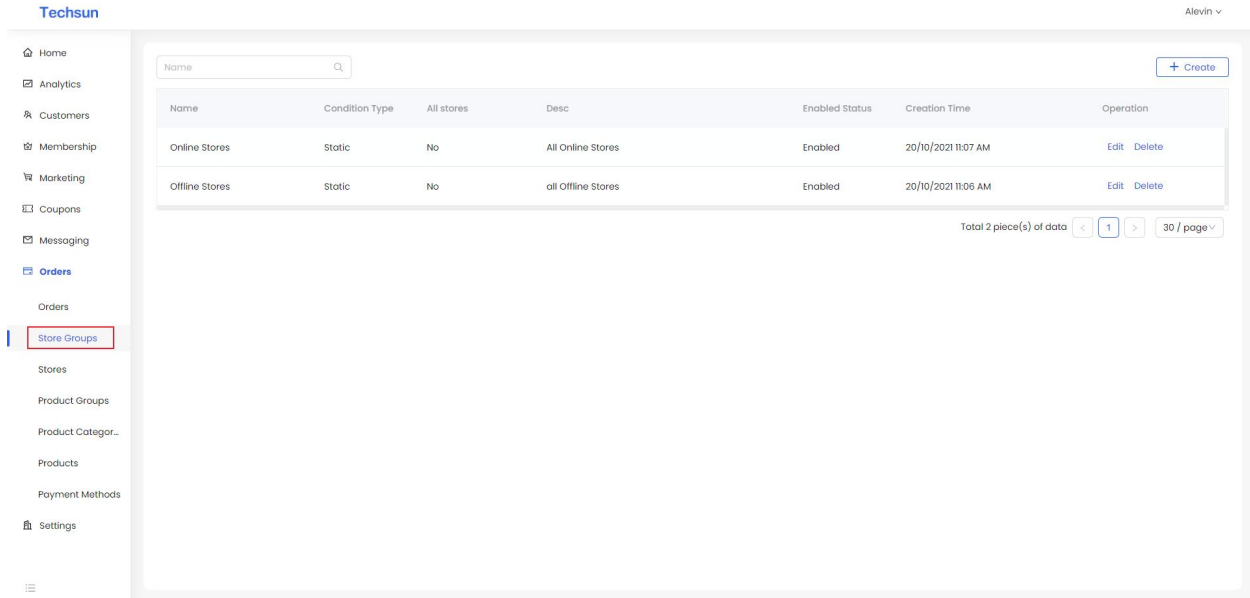


## STORE GROUPS

### 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;
- 4) 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;

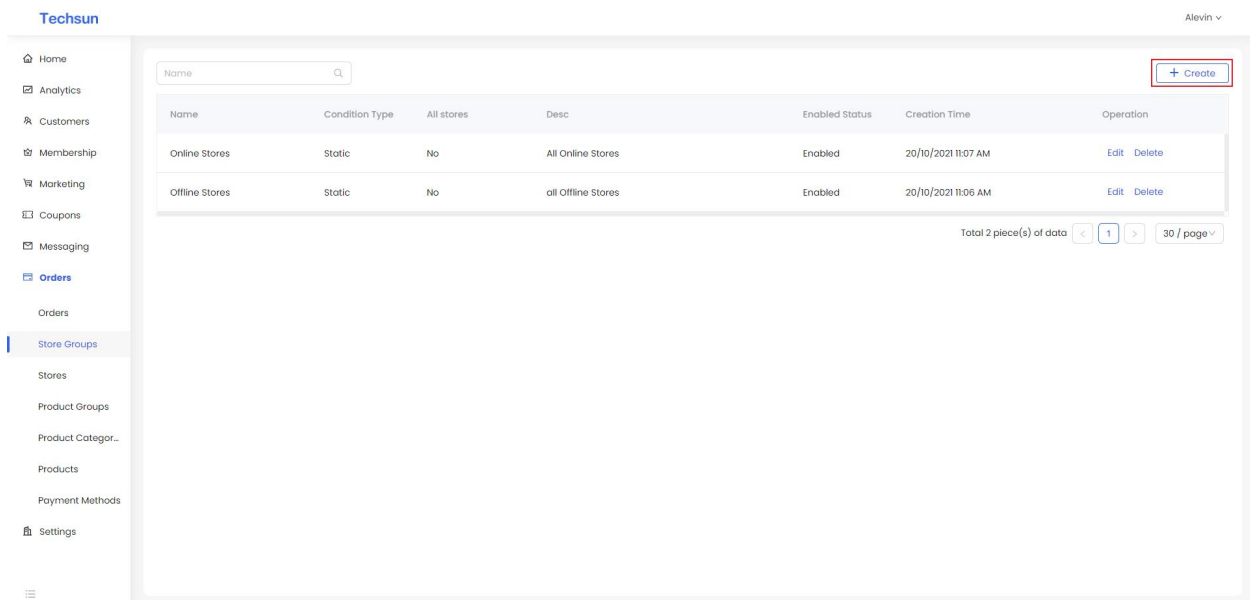
## Step 1: Select the menu bar [Orders] → [Store groups] to enter the Store groups view interface



### Instruction Manual:

- 1) Support searching by name;

## Step 2: Click the [Create] button





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

Home > Orders > Store Groups > Create

**Basic Info**

\* Name:

All stores: ☒ No ☐ Yes

Store Filter Condition: Usable after created

Condition Type:

Enabled Status:

\* Desc:

Creation Time:

Modification Time:

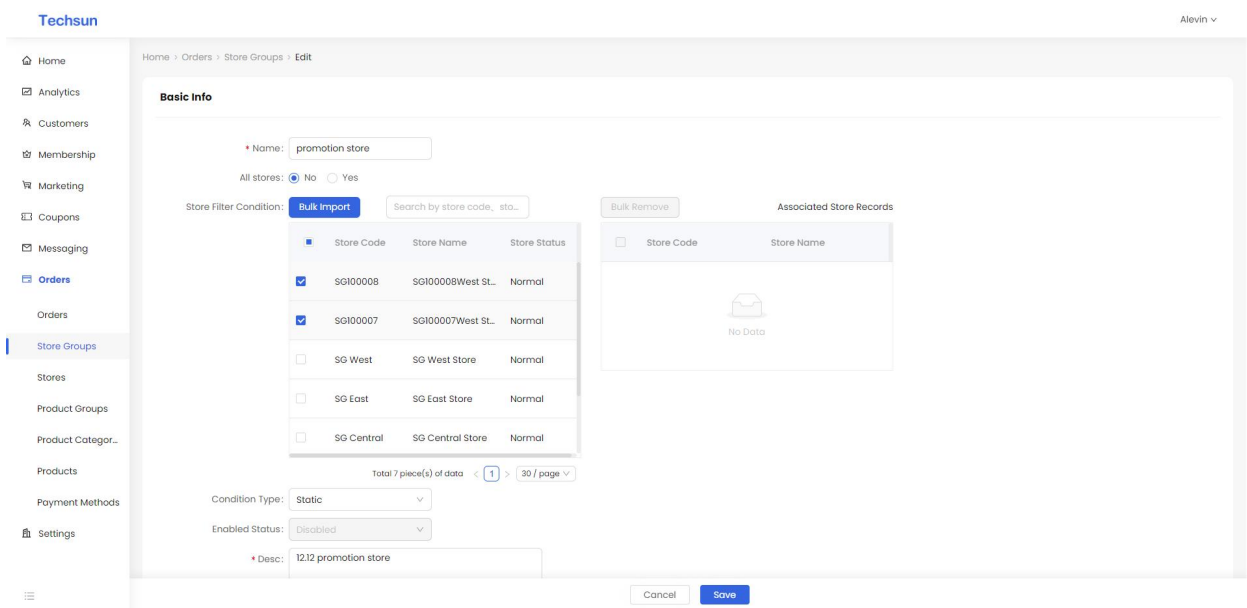
### Step 4: After saving, click Edit to add the store

Home > Orders > Store Groups

Search:

Name	Condition Type	All stores	Desc	Enabled Status	Creation Time	Operation
promotion store	Static	No	12.12 promotion store	Disabled	14/12/2021 10:26 AM	<input type="button" value="Edit"/> <input type="button" value="Enable"/> <input type="button" value="Delete"/>
Online Stores	Static	No	All Online Stores	Enabled	20/10/2021 11:07 AM	<input type="button" value="Edit"/> <input type="button" value="Delete"/>
Offline Stores	Static	No	all Offline Stores	Enabled	20/10/2021 11:06 AM	<input type="button" value="Edit"/> <input type="button" value="Delete"/>

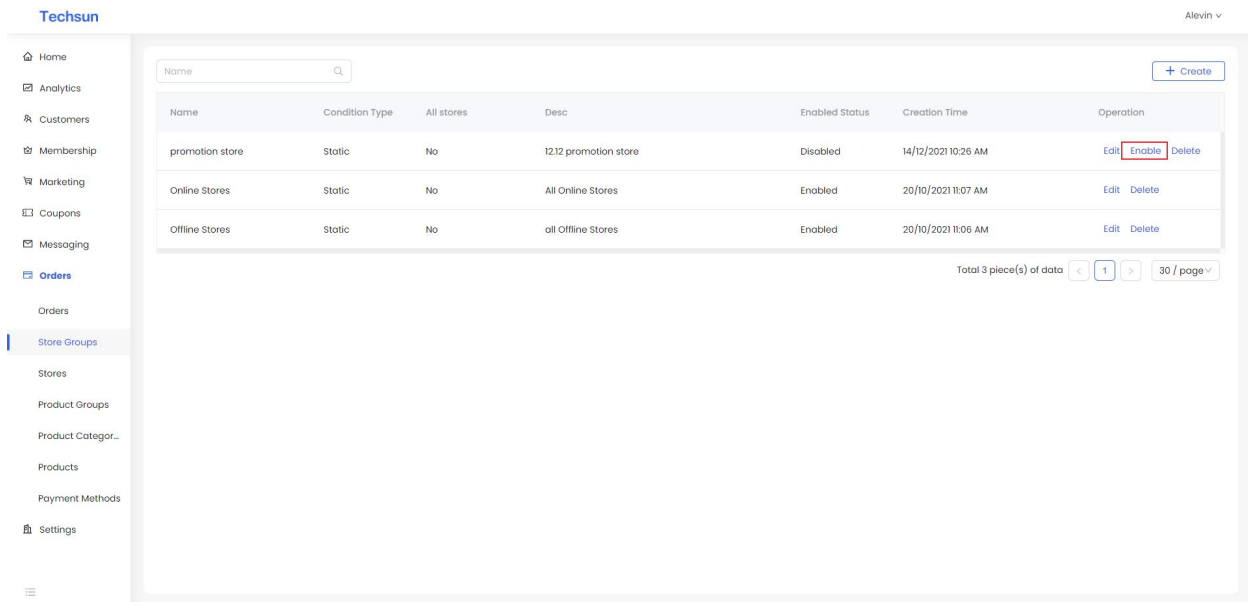
Total 3 piece(s) of data



## Instruction Manual:

- 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**



## STORES

### Function Description:

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

**Step 1: Select the menu bar [Orders] → [Stores] to enter the store record view interface**

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Home Analytics Customers Membership Marketing Coupons Messaging **Orders**

Orders Store Groups **Stores** Product Groups Product Categor... Products Payment Methods Settings

Search by store code, store name

Store Code	Store Name	Source	Store Type	Parent Unit	Country/Region	Province/State	City	Store Status	Creation Time
SG100008	SG100008West Store	POS	HQ			Singapore	Singapore	Normal	18/11/2021 3:09 PM
SG100007	SG100007West Store	POS	HQ			Singapore	Singapore	Normal	18/11/2021 3:09 PM
SG West	SG West Store	POS	HQ			Singapore	Singapore	Normal	19/10/2021 6:11 PM
SG East	SG East Store	POS	HQ			Singapore	Singapore	Normal	19/10/2021 6:11 PM
SG Central	SG Central Store	POS	HQ			Singapore	Singapore	Normal	19/10/2021 6:05 PM
EBUY	EBUYEBUY	WeChat Mall	Offline			Singapore	Singapore	Normal	24/9/2021 11:59 AM
sdwebsite	sdwebsite	Express Official Website	Official Website			Singapore	Singapore	Normal	24/9/2021 11:55 AM

Total 7 piece(s) of data < 1 > 30 / page

## Instruction Manual:

- 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;

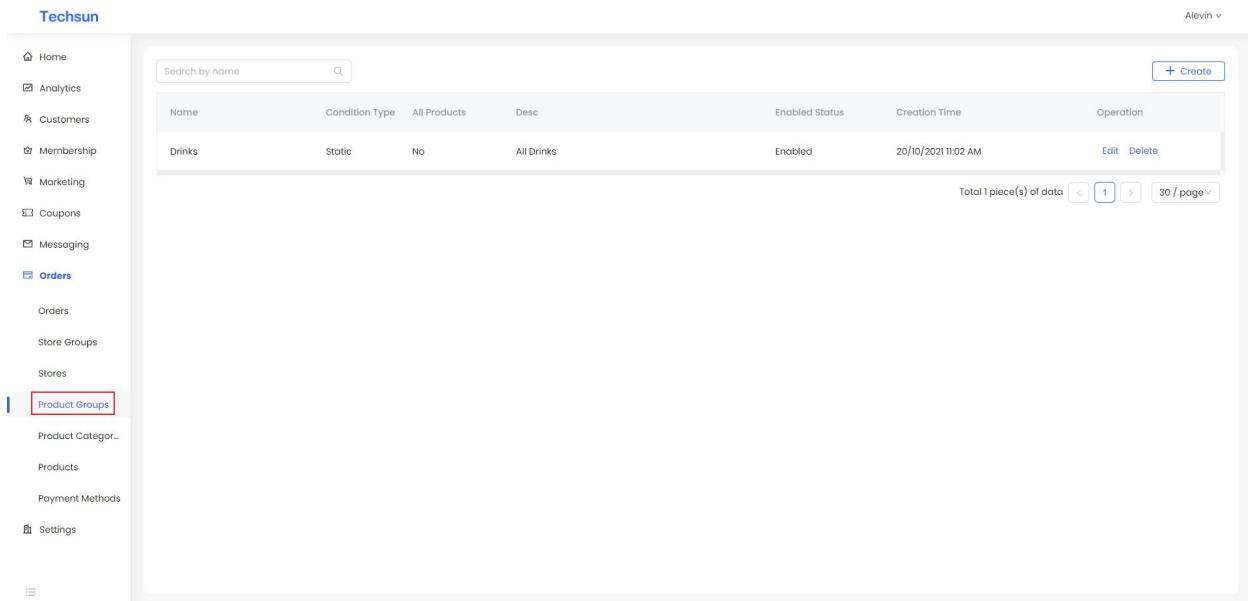
## PRODUCT GROUPS

### 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;

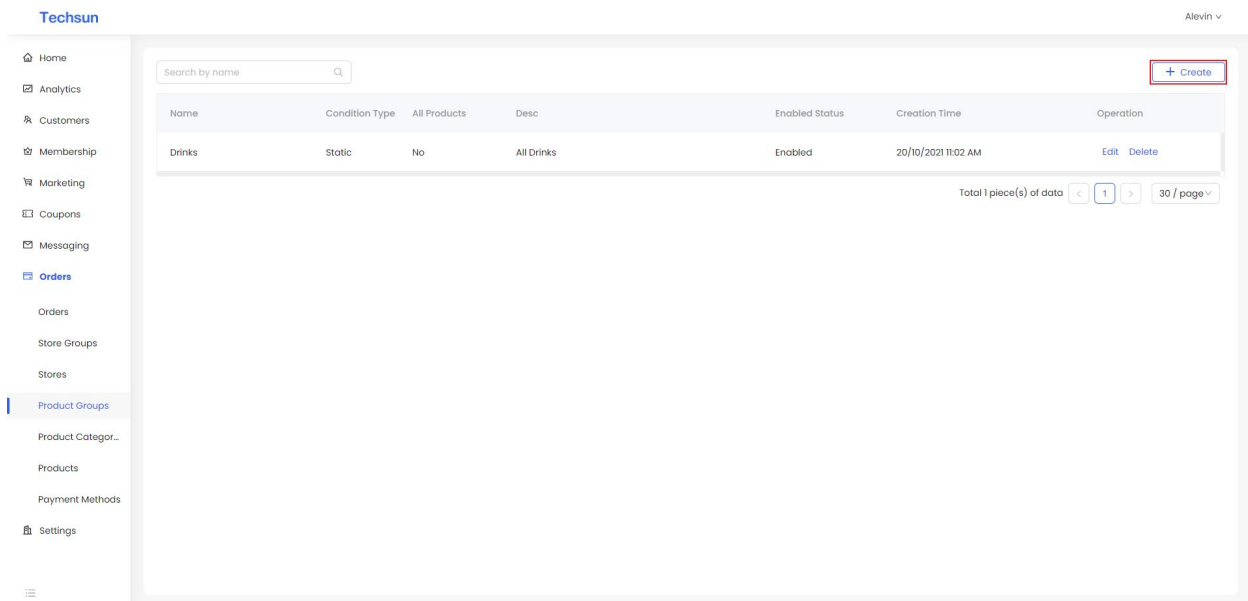
## Step 1: Select the menu bar [Orders] → [Product Groups] to enter the Product Groups view interface



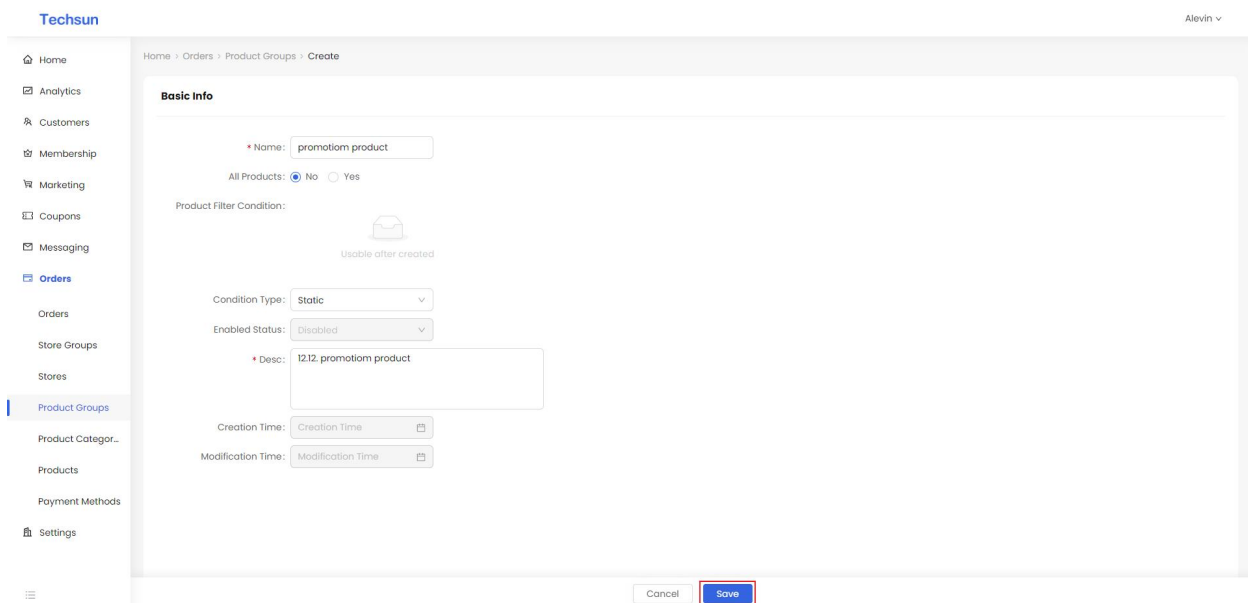
### Instruction Manual:

- 1) Support searching by name;

## Step 2: Click the [Create] button



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



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

**Techsun** Alevin v

Home Analytics Customers Membership Marketing Coupons Messaging **Orders** Orders Store Groups Stores **Product Groups** Product Categor... Products Payment Methods Settings

Search by name

[+ Create](#)

Name	Condition Type	All Products	Desc	Enabled Status	Creation Time	Operation
promotion product	Static	No	12.12. promotion product	Disabled	14/12/2021 10:30 AM	<a href="#">Edit</a> <a href="#">Enable</a> <a href="#">Delete</a>
Drinks	Static	No	All Drinks	Enabled	20/10/2021 11:02 AM	<a href="#">Edit</a> <a href="#">Delete</a>

Total 2 piece(s) of data < 1 > 30 / page v

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**Techsun** Alevin v

Home Analytics Customers Membership Marketing Coupons Messaging **Orders** Orders Store Groups Stores **Product Groups** Product Categor... Products Payment Methods Settings

Home > Orders > Product Groups > **Edit**

**Basic Info**

\* Name:

All Products: ☒ No ☐ Yes

Product Filter Condition: [Bulk Import](#)

[Bulk Remove](#) **Associated Product Records**

<input type="checkbox"/>	Product Code	Product Name	Product Cate...
<input checked="" type="checkbox"/>	PR1000109	Sausage MMu...	CT100010
<input checked="" type="checkbox"/>	PR1000108	Sausage MMu...	CT100010
<input type="checkbox"/>	PR1000107	Sausage MMu...	CT100010
<input type="checkbox"/>	PR1000106	Sausage Bisc...	CT100010
<input type="checkbox"/>	PR1000105	Sausage Bisc...	CT100010

Total 112 piece(s) of data < 1 2 3 4 > 30 / page v [Go to](#)

Condition Type:

Enabled Status:

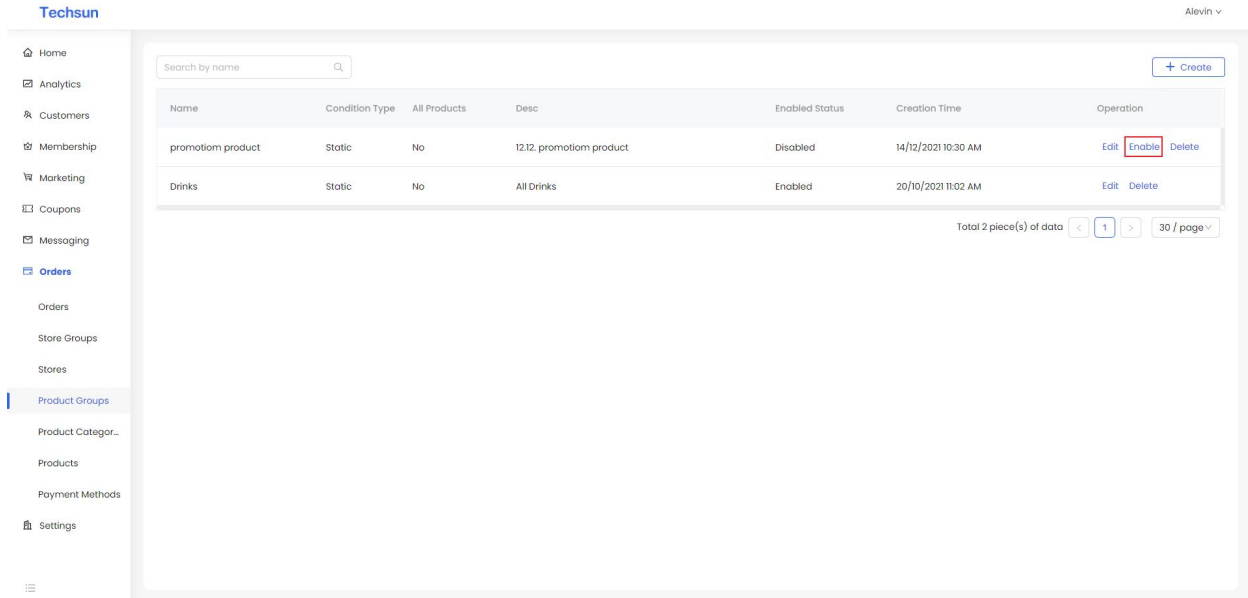
\* Desc:

[Cancel](#) [Save](#)

## Instruction Manual:

- 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



### 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] → [Product Category] to enter the product category view interface



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Home Analytics Customers Membership Marketing Coupons Messaging **Orders** Orders Store Groups Stores Product Groups **Product Categor...** Products Payment Methods Settings

Search by category code/category... Q

Product Category Code	Source	Category Type	Parent Product Category Code	Category Chinese Name	Creation Time
101287	Shopee	Level 3	100725		03/12/2021 11:07 AM
101103	Shopee	Level 3	100700		03/12/2021 11:07 AM
101073	Shopee	Level 3	100695		03/12/2021 11:07 AM
101078	Shopee	Level 3	100695		03/12/2021 11:07 AM
100538	Shopee	Level 2	100531		03/12/2021 11:06 AM
100539	Shopee	Level 2	100531		03/12/2021 11:06 AM
100537	Shopee	Level 2	100531		03/12/2021 11:06 AM
100540	Shopee	Level 2	100531		03/12/2021 11:06 AM
100536	Shopee	Level 2	100531		03/12/2021 11:06 AM
100543	Shopee	Level 2	100531		03/12/2021 11:06 AM
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

## Instruction Manual:

- 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] → [Products] to enter the commodity record view interface**

Techsun SuperAdmin

Home Analytics Customers Membership Marketing Coupons Messaging **Orders** Store Groups Stores Product Groups Product Categor... **Products** Payment Methods Settings

Search by product category Search by product code/product n...

Product Code	Product Name	Source	Product Category Code	Creation Time
PR1000109	Sausage MMuffin	Shopify	CT100010	20/10/2021 11:00 AM
PR1000108	Sausage MMuffin with Egg	NEWPOS	CT100010	20/10/2021 11:00 AM
PR1000107	Sausage MMuffin with Cheese	JD Flagship Shop	CT100010	20/10/2021 10:59 AM
PR1000106	Sausage Biscuit	JD Flagship Shop	CT100010	20/10/2021 10:59 AM
PR1000105	Sausage Biscuit with Egg	POS	CT100010	20/10/2021 10:59 AM
PR1000104	Ice Chocolate	POS	CT100001	20/10/2021 10:59 AM
PR1000103	Ice Tea	NEWPOS	CT100001	20/10/2021 10:59 AM
PR1000102	Hot Tea	NEWPOS	CT100001	20/10/2021 10:59 AM
PR1000101	Mango Pineapple Juice	POS	CT100001	20/10/2021 10:59 AM
PR1000100	Strawberry Banana Juice	Shopify	CT100001	20/10/2021 10:59 AM
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

## Instruction Manual:

- 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] → [Payment Methods] Record View Interface

Payment Method Code	Payment Method Name	Calculate Points	Source	Payment Method Category	Creation Time	Operation
102	WeChat Payment	Yes	POS	RMB	24/9/2021 2:06 PM	<a href="#">Edit</a>
101	Cash Payment	Yes	POS	RMB	24/9/2021 2:05 PM	<a href="#">Edit</a>

Total 2 piece(s) of data < 1 > 30 / page

## Instruction Manual:

- 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

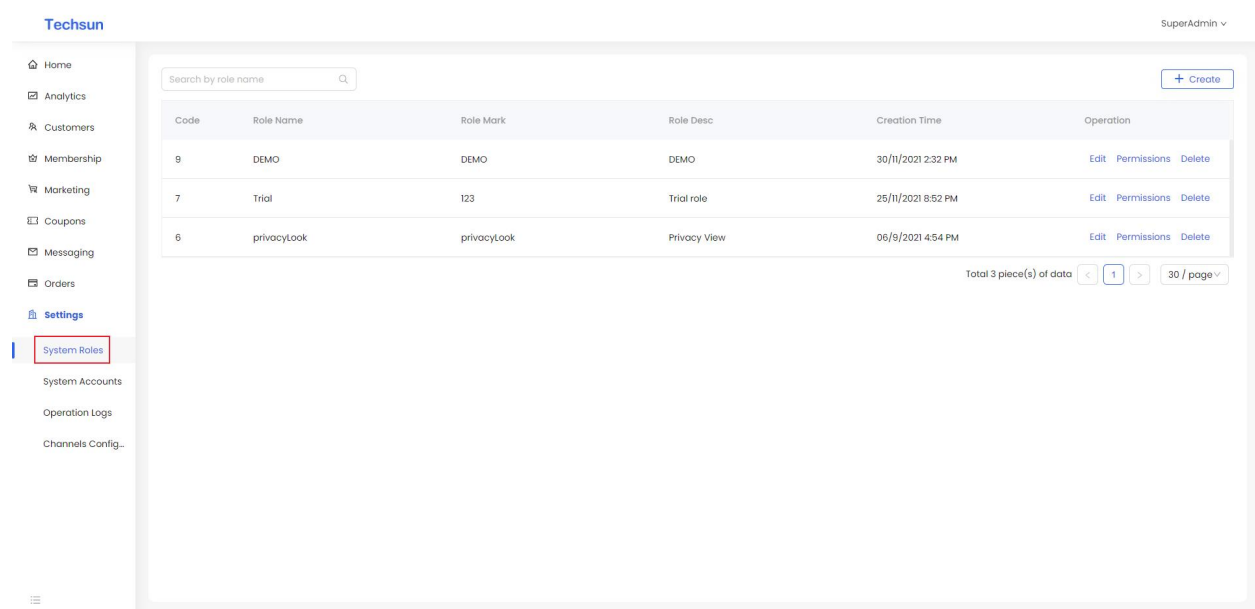
corresponding to the roles, and can operate the system according to the permissions definition;

## SYSTEM ROLES

### Function Description:

Create roles and define menu and button permissions through roles;

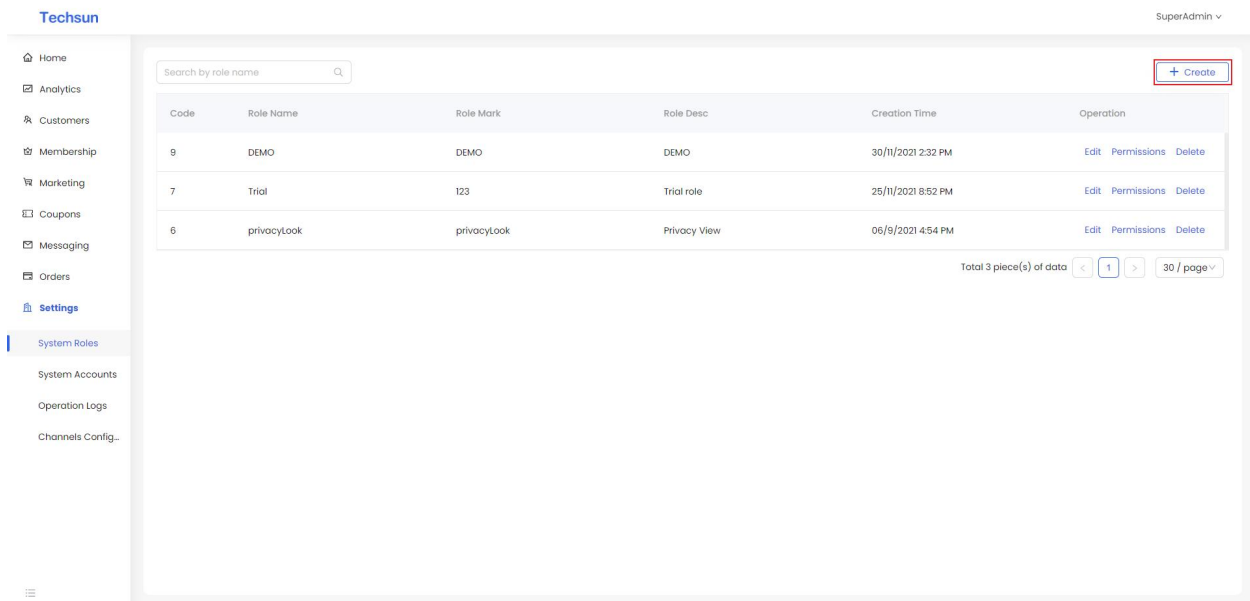
**Step 1: Select the menu bar [Settings] → [System Roles] to enter the System Roles view interface**



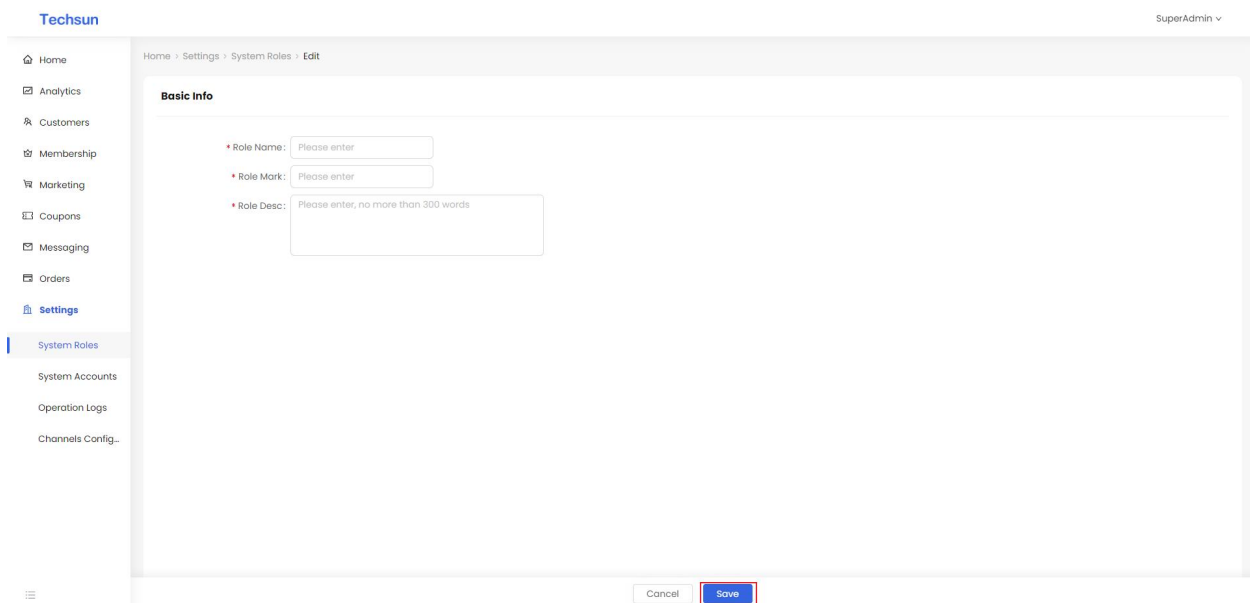
Instruction Manual:

1) The system supports searching by role name;

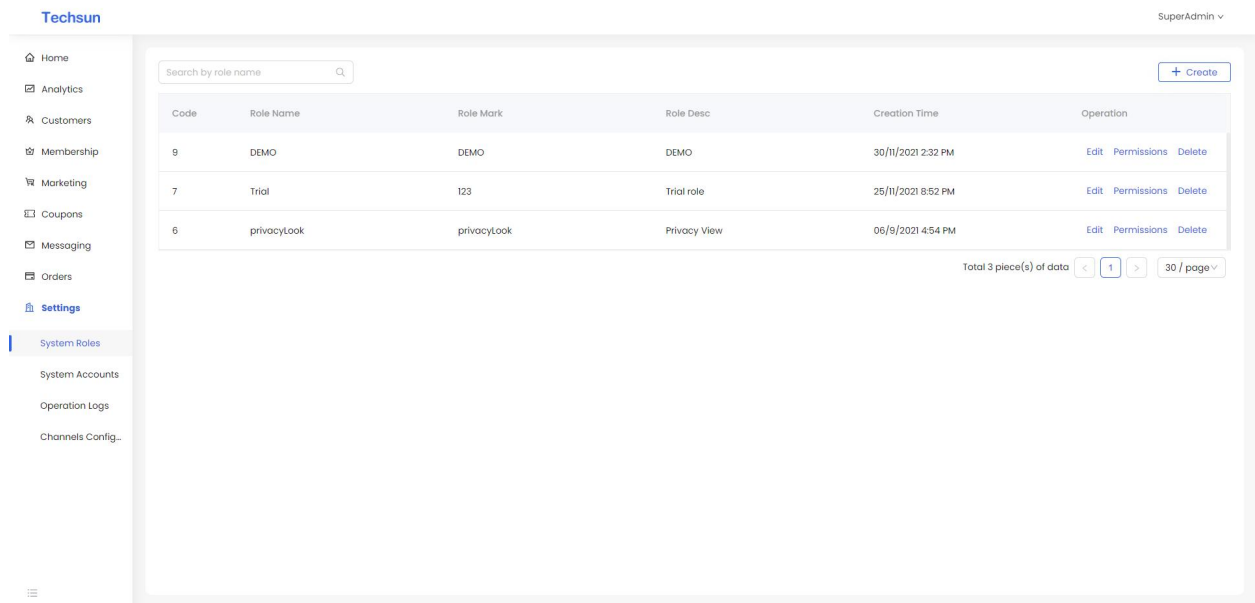
**Step 2: Click the [Create] button**



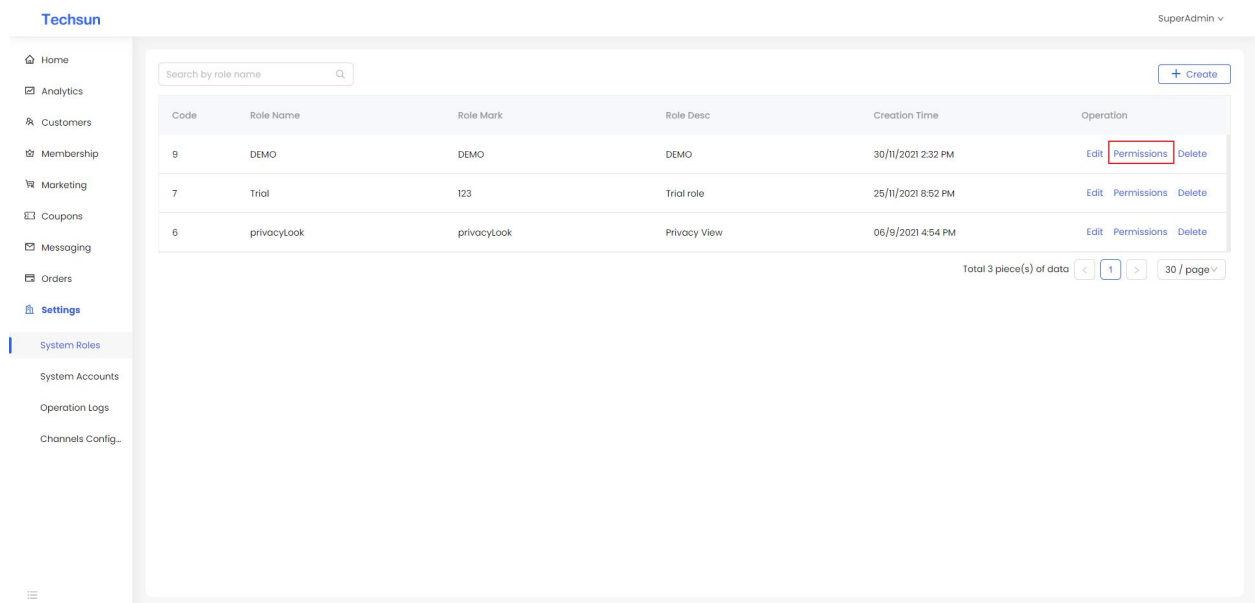
**Step 3: After entering specific information on the creation page, click Save**



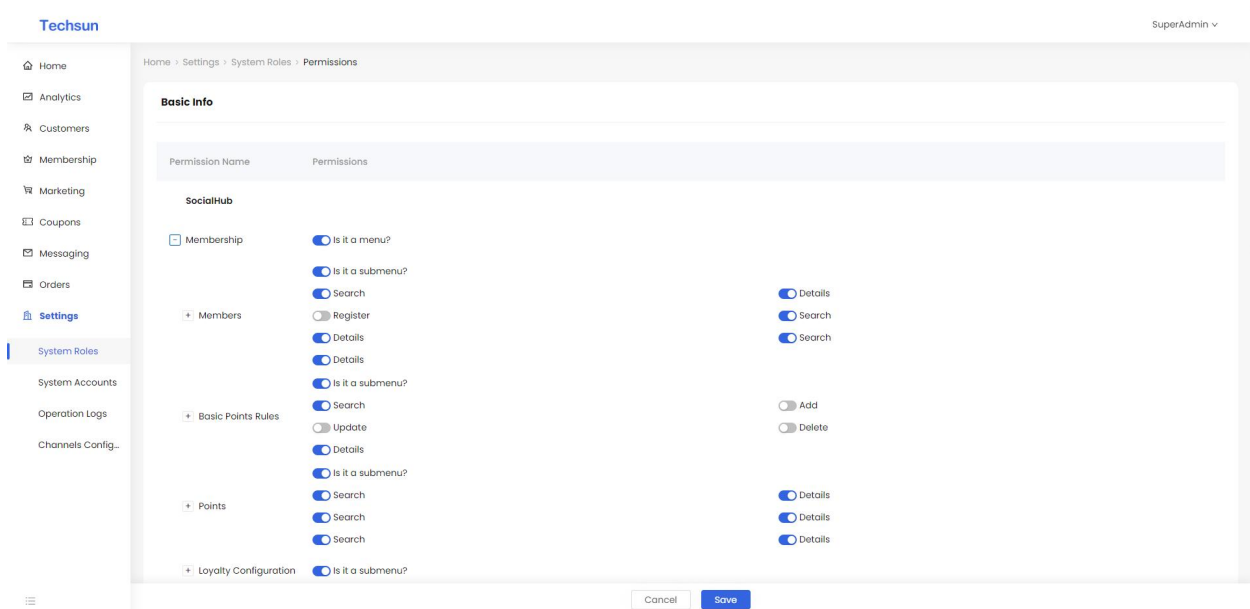
**Step 4: Complete the creation of the role**



## Step 5: Set permissions for roles



## Step 6: Configure the corresponding permissions



## Instruction Manual:

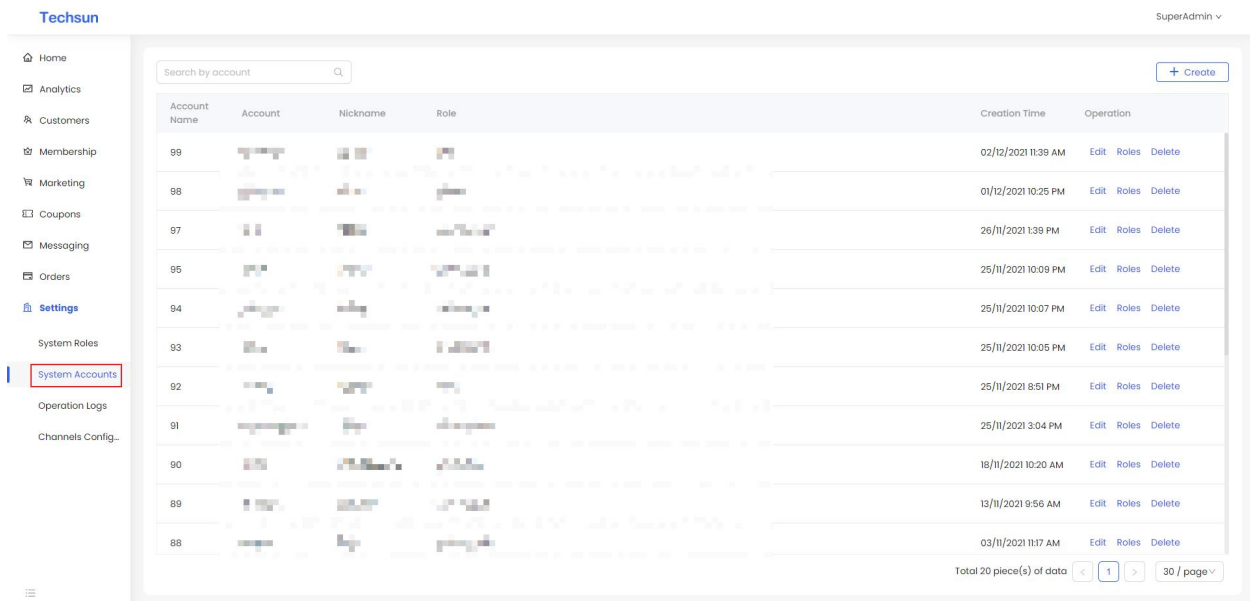
- 1) Support menu and button level permission configuration;

### 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;

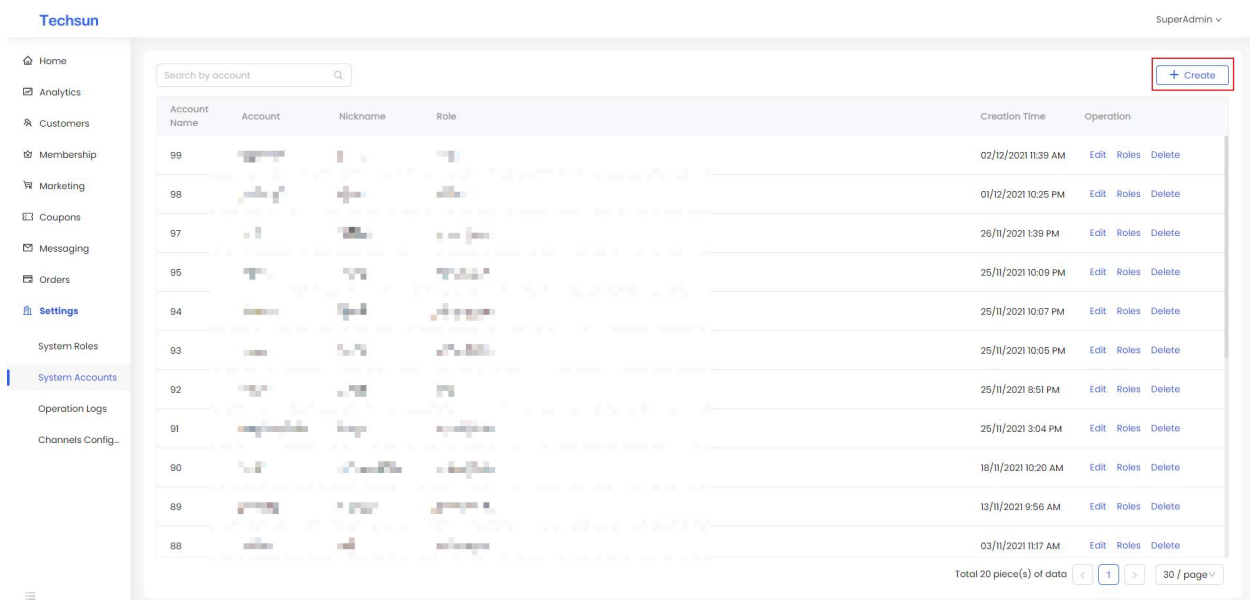
**Step 1: Select the menu bar [Settings] → [System Accounts] to enter the system account view interface**



## Instruction Manual:

- 1) Support search by account;

## Step 2: Click the [Create] button



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



Techsun SuperAdmin

Home > Settings > System Accounts > [Edit](#)

**Basic Info**

\* Account:

\* Password:

\* Nickname:

\* Phone Number:

Email:

Multi-factor Verification: ☐ Yes ☒ No

[Cancel](#) [Save](#)

## Step 4: Complete the creation of the role

Techsun SuperAdmin

Home > Settings > System Accounts > [Edit](#)

Search by account

[+ Create](#)

Account Name	Account	Nickname	Role	Creation Time	Operation
99	Demo001	Demo	Trial	02/12/2021 11:39 AM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
98				01/12/2021 10:25 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
97				26/11/2021 1:39 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
95				25/11/2021 10:09 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
94				25/11/2021 10:07 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
93				25/11/2021 10:05 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
92				25/11/2021 8:51 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
91				25/11/2021 3:04 PM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
90				18/11/2021 10:20 AM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
89				13/11/2021 9:56 AM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>
88				03/11/2021 11:17 AM	<a href="#">Edit</a> <a href="#">Roles</a> <a href="#">Delete</a>

Total 20 piece(s) of data [1](#) / 30 / page

## Step 5: Assign roles to users

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Coupons
Messaging
Orders
Settings
System Roles
System Accounts
Operation Logs
Channels Config...

Search by account
+ Create

Account Name	Account	Nickname	Role	Creation Time	Operation
99				02/12/2021 11:39 AM	Edit Roles Delete
98				01/12/2021 10:25 PM	Edit Roles Delete
97				26/11/2021 1:39 PM	Edit Roles Delete
95				25/11/2021 10:09 PM	Edit Roles Delete
94				25/11/2021 10:07 PM	Edit Roles Delete
93				25/11/2021 10:05 PM	Edit Roles Delete
92				25/11/2021 8:51 PM	Edit Roles Delete
91				25/11/2021 3:04 PM	Edit Roles Delete
90				18/11/2021 10:20 AM	Edit Roles Delete
89				13/11/2021 9:56 AM	Edit Roles Delete
88				03/11/2021 11:17 AM	Edit Roles Delete

Total 20 piece(s) of data
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Techsun
SuperAdmin

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Messaging
Orders
Settings
System Roles
System Accounts
Operation Logs
Channels Config...

Home > Settings > System Accounts > Roles

Basic info

☐ privacyLook
☒ Trial
☐ DEMO

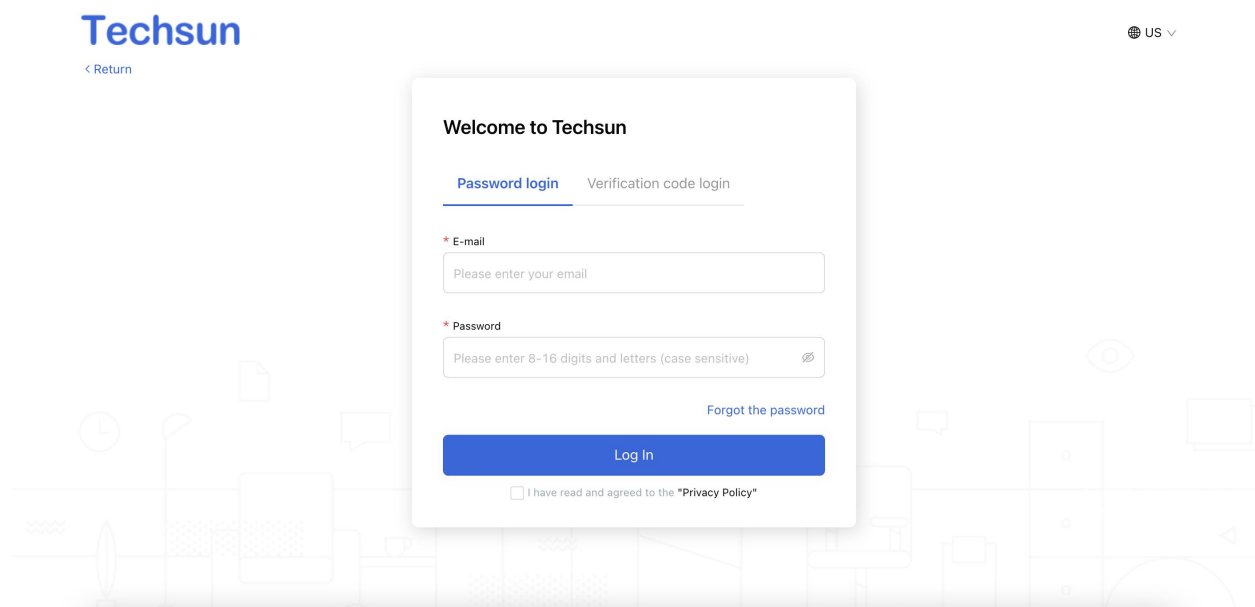
Cancel
Save

## SYSTEM ACCOUNT PASSWORD MODIFICATION

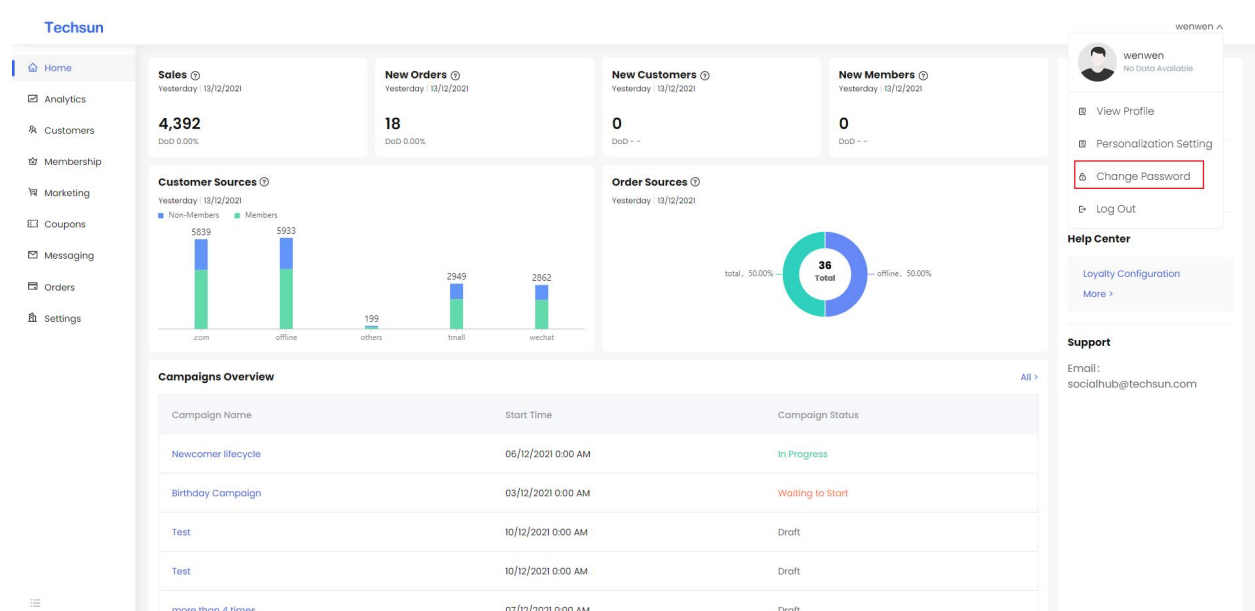
### Function Description:

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

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



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



## Step 3: Complete the password modification

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Messaging

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Settings

Change Password

\* Original Password:

Please enter

🗕

\* New Password:

Please enter

🗕

\* Confirm Password:

Please enter

🗕

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>