

Points Management Module

[1.0]

Cream

[02/07/2021]



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SOFTWARE

QNE TIPS

Product : QNE Optimum


Version: 1.00

Doc No : 1

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Amendment Record

REV. No	Nature of Change	Prepared By	Prepared Date	Reviewed & Approved by
1.0	Creation	Cream	02/07/2021	Roseanne Lee

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SCENARIO

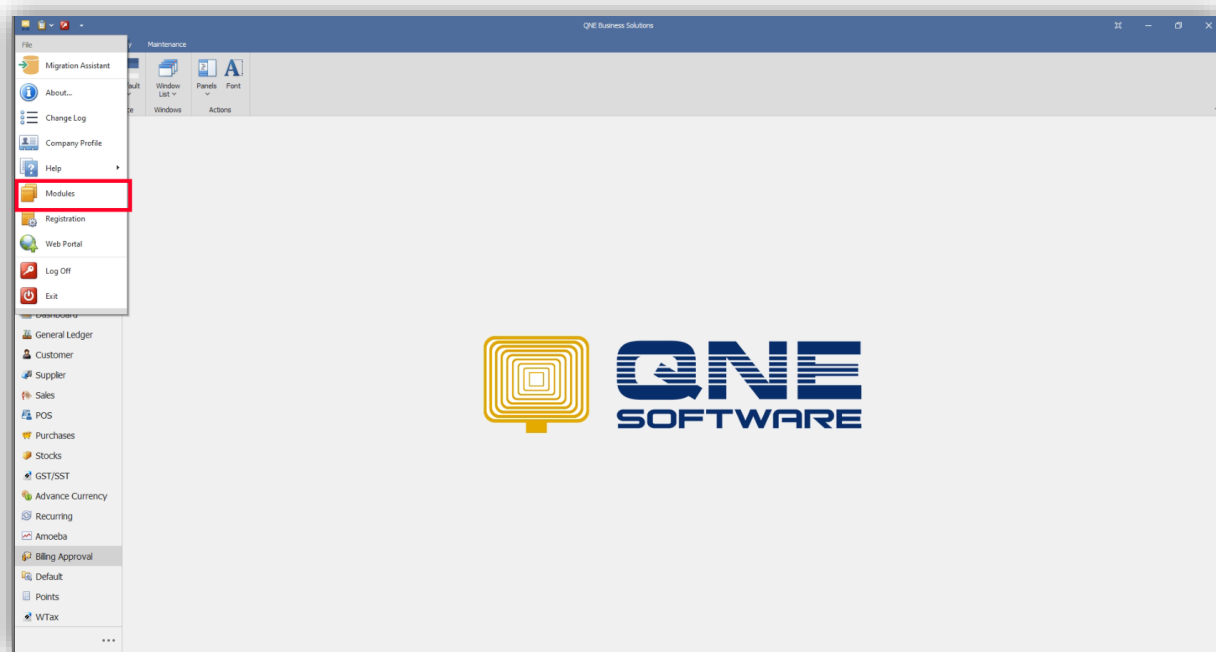
User can set their customers as “members” and allocate points if the customers do purchase. The customer can redeem the items based on the points he accumulated.

* Point Management Control Module is an additional module; customer need to pay additional charges if they want to use.

SOLUTION

Apply Point Management Control Module

1. Go to File and select “Module”





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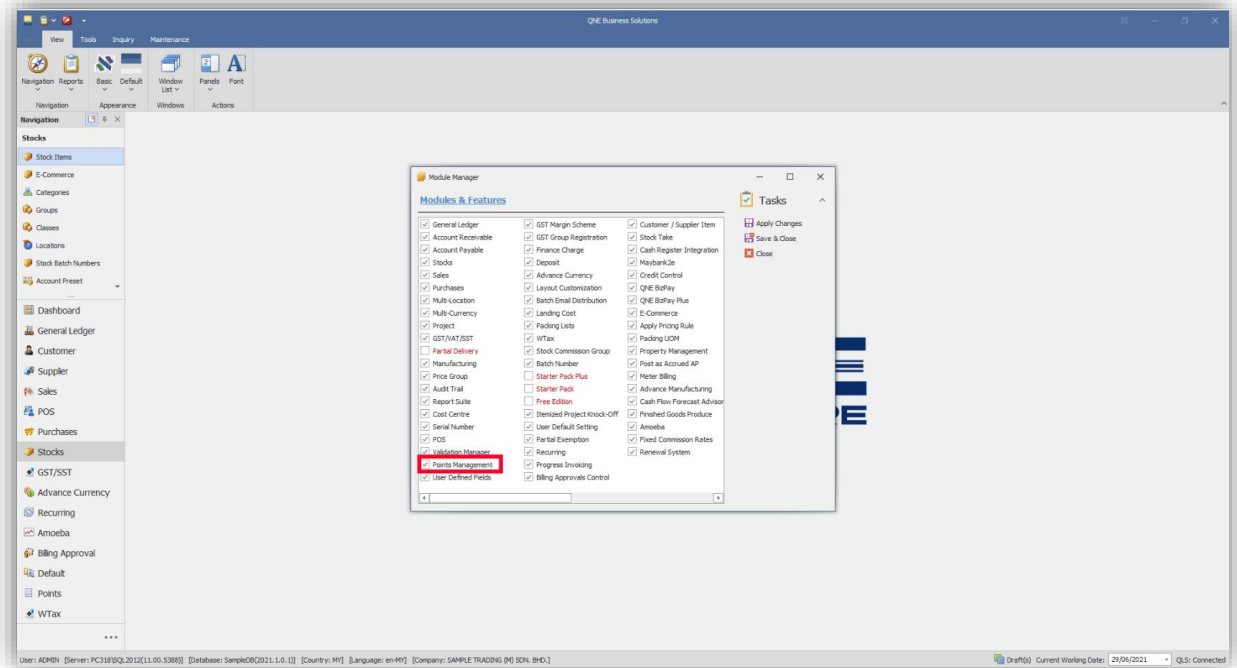
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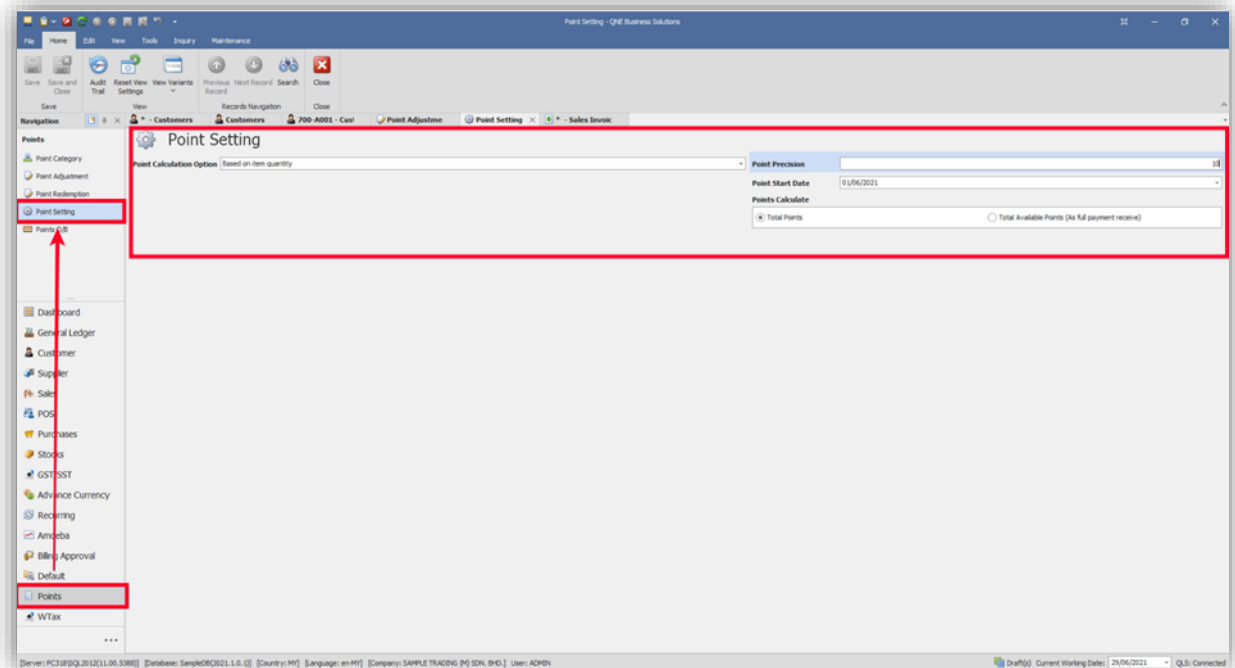
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- Find a module named “Points Management Control” and tick it.



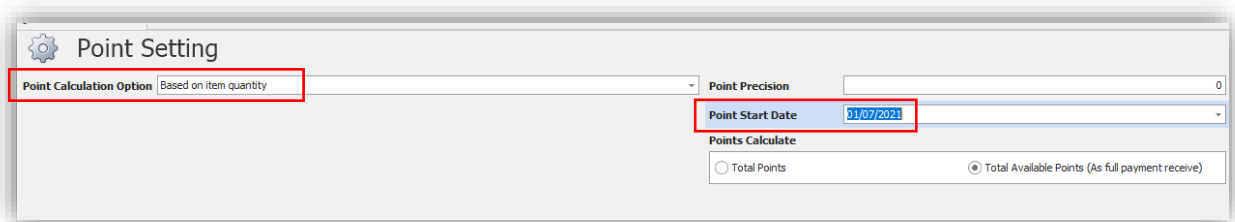
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3. Click “Points” and do the Point Setting.




- **Point Calculation Option & Point Start Date**

Make sure that you choose “Based on item quantity” in the Point Calculation Option and set point start date



Note1: If Point Calculation Option = Do not calculate point, system will not take effect

Note2: If Point Start Date = Empty, system will not take effect, if user set Point Start Date as 1/7/2021, system will take effect after 1/7/2021, means the transaction before will not affected

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- **Point Precision**

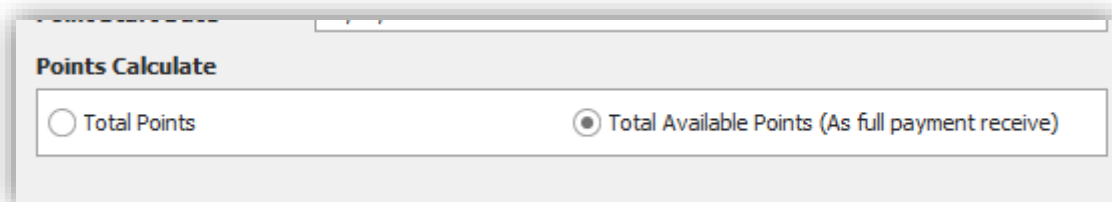
If there are any decimal points to calculate in Points



A dialog box titled "Point Precision" with a text input field containing the number "0".

- **Point Calculation**

user can choose between "Total Points" and "Total Available Points"



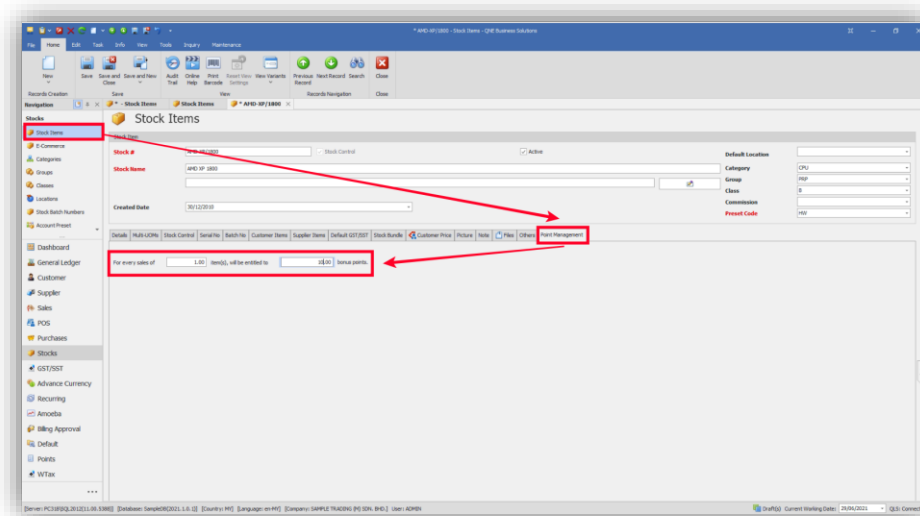
A dialog box titled "Points Calculate" with two radio button options: "Total Points" (unselected) and "Total Available Points (As full payment receive)" (selected).


- *Total Points = Points will be allocated to the customers once user issues invoices, cash sales or sales debit notes to them.*

- *Total Available Points = Points will only be allocated to the customers after they did the full payment for their invoices, cash sales or sales debit note.*

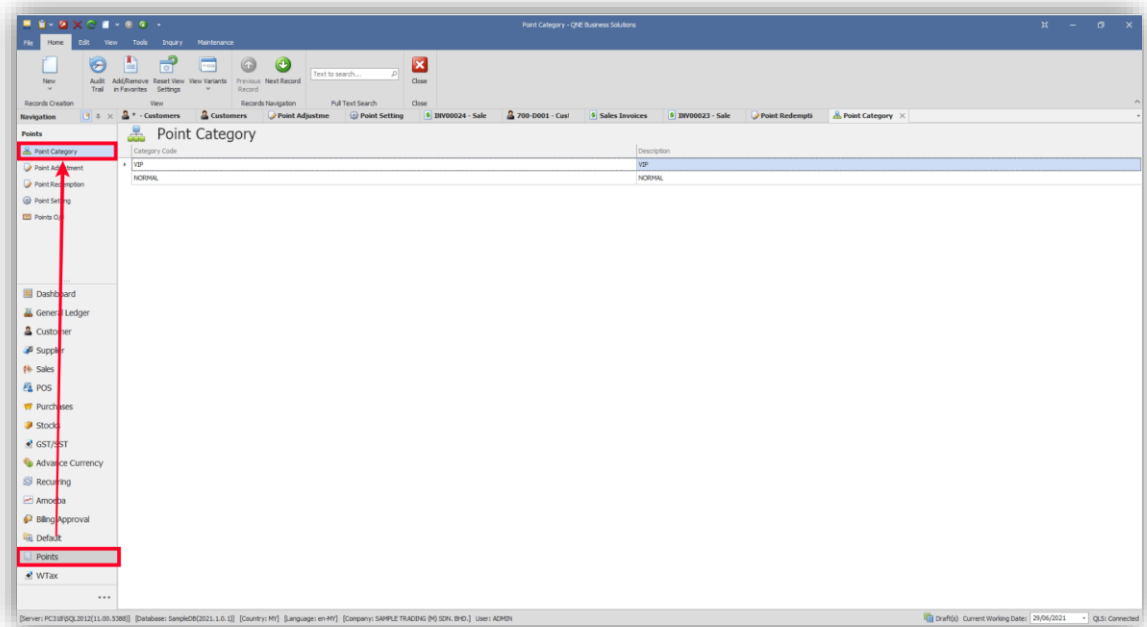
4. Go to Stock -> Stock Item -> Point Management-> Key in (n)quantity= (n)points

*For Example, 1 Quantity of Stock = 10 Points

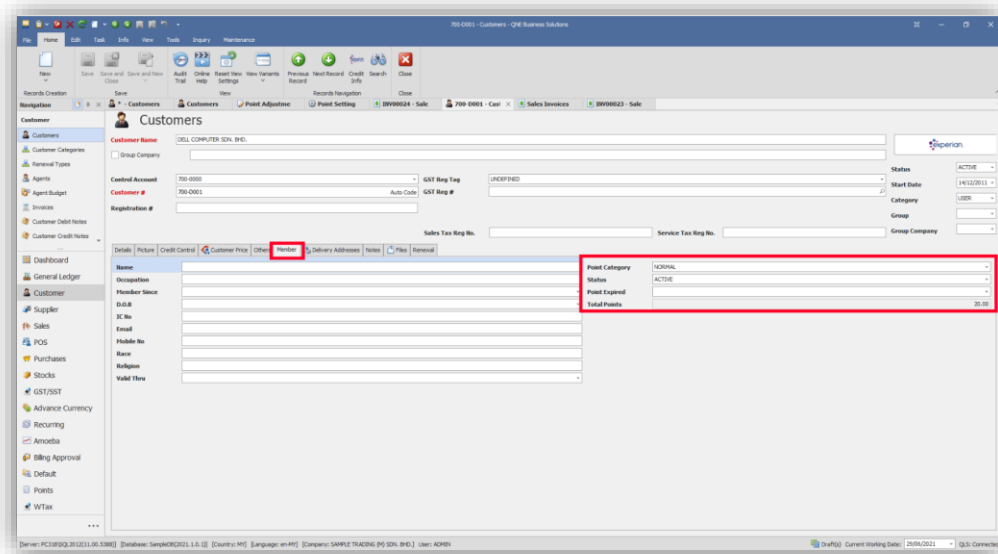


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5. You can define different customers into different categories.
 *For example, you can set “Normal” and “VIP” as categories to categorize your customers.

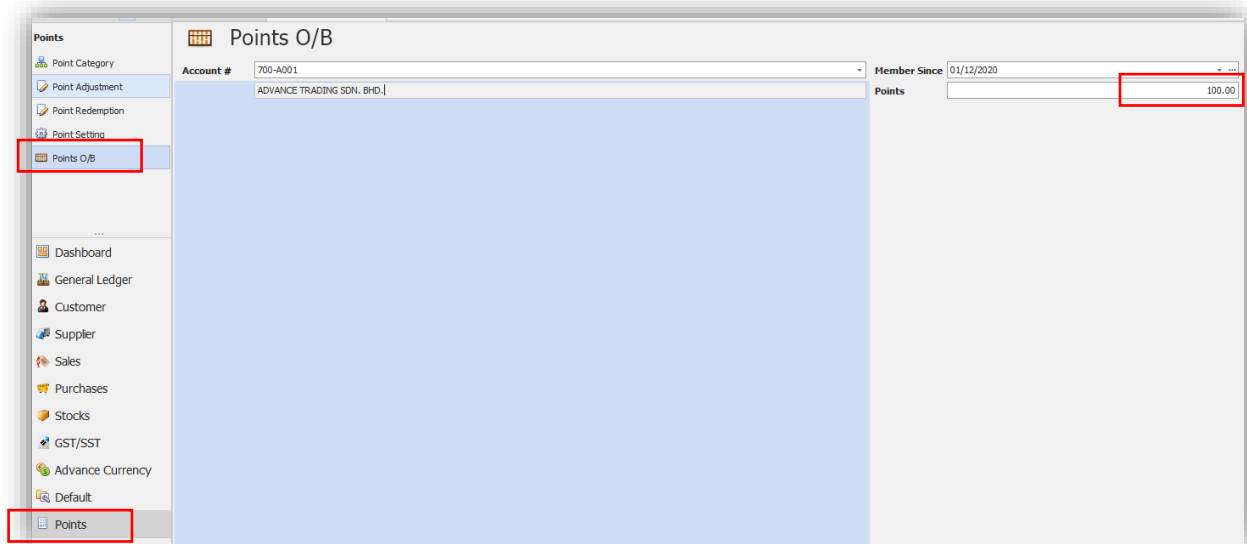


6. Go to Customer and look for “Members”, choose the Point Category, make sure you select ACTIVE as the status, you will see the total points if customer purchase the item that you set for point management
 Note: System will not take effect if “Point Category” & “Status” do not set up



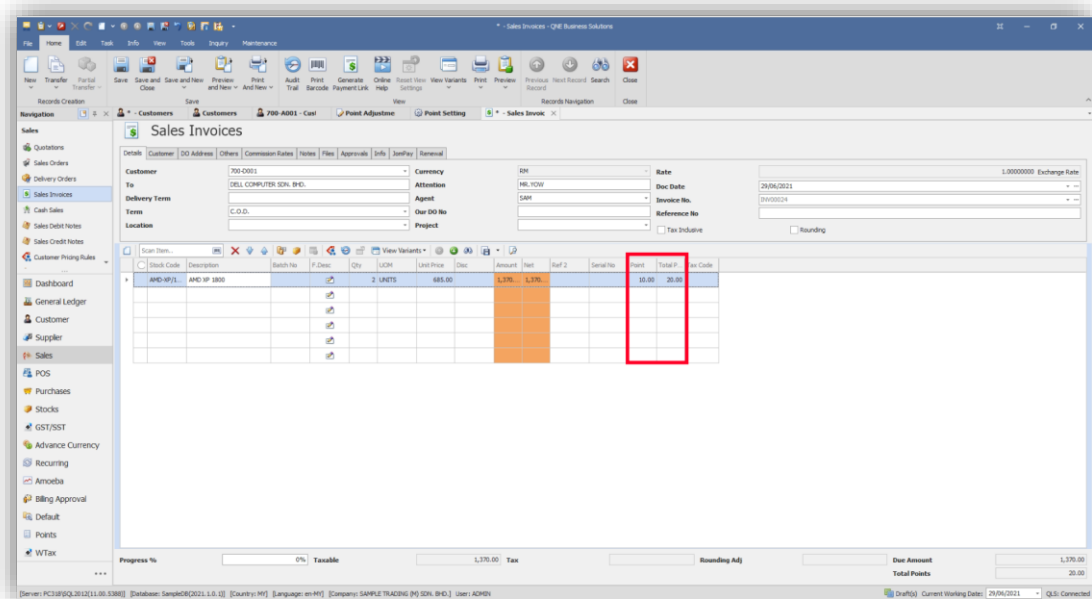
7. Set up Points Opening Balance

This is for those users who have implement Point System before they implement in QNE Software.
User can update customer bring forward points in the system



Account #	Member Since	Points
700-A001 ADVANCE TRADING SDN. BHD.	01/12/2020	100.00

8. After completing the settings, you can create Sales Invoice, Sales Debit Note or Cash Sales You can drag the columns "Point" and "Total Points", you can see the points allocated according to the stock quantity if you select the Item you set for Point before



Stock Code	Description	Batch No	P. Desc	Qty	UOM	Unit Price	Disc	Amount	Net	Ref 2	Serial No	Point	Total P	Tax Code
AMP-001	AMP-IP 1800			2	UNITS	885.00		1,770.00	1,770.00			10.00	20.00	



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Cash Sales

Customer: 700-0001
To: DELL COMPUTER SDN. BHD.
Term: C.O.D.
Location:
Bank Charges: 0.00

Currency: RM
Attention: MR.YOW
Agent: SAM
Deposit To: CASH IN HAND
Reference No.:

Doc Date: 07/07/2021
C. Sales No.: C000001
Cheque No.:

Post To AR ☐ Tax Inclusive ☐ Rounding ☐

Customer L	Stock Code	Description	Batch No	Qty	UOM	Unit Pr	Disc	Amount	Commission	Tax C.	Tax	Net	Point	Total P.	Serial No
	AMD-VP/1	AMD VP 1800		1	UNITS	685.00		685.00		SR	41.10	726.10	10.00	10.00	

Taxable: 685.00 Tax: 41.10 Rounding Adj: Total Points: 10.00

Due Amount: 726.10

Server: PC138\SQ2012(11.00.5380) Database: SampleDB(2021.1.0.1) Country: MY Language: en-MY Company: SAMPLE TRADING (P) SDN. BHD. User: B08 Draft(5) Current Working Date: 07/07/2021 QLS: Connected

Sales Debit Notes

Customer: 700-0001
To: DELL COMPUTER SDN. BHD.
Ref Sales Inv:
Agent: SAM

Currency: RM
Attention: MR.YOW
Reason:
Project:

Doc Date: 07/07/2021
Debit Note No.: DN2107001
Term: C.O.D.
Reference No.:

Post To AR ☐ Tax Inclusive ☐ Rounding ☐

Customer L	Stock Code	Description	F Desc	Batch No	Qty	UOM	Unit Pr	Disc	Amount	Commission	Tax C.	Tax	Net	Point	Total P.	Serial No
	AMD-VP/1	AMD VP 1800			1	UNITS	685.00		685.00		SR	41.10	726.10	10.00	10.00	

Taxable: 685.00 Tax: 41.10 Rounding Adj: Total Points: 10.00

Due Amount: 726.10

Server: PC138\SQ2012(11.00.5380) Database: SampleDB(2021.1.0.1) Country: MY Language: en-MY Company: SAMPLE TRADING (P) SDN. BHD. User: B08 Draft(5) Current Working Date: 07/07/2021 QLS: Connected



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9. If the customer wants to redeem their point, you can click Points->Points Redemptions, choose the customer and you can see the available points there
Choose the stock item and correct quantity and click save.

Point Redemption

Customer: 700-0001

Member No:

Outstanding Amount:

Description:

Total Points: 20.00

Redemption Points: 10.00

Points After Redemption: 10.00

Date: 30/06/2021

Point Redemption #: PNR2106/001

Reference No:

Stock	Description	Batch No	P Desc	Qty UOM	Unit Price	Amount	Tax Code	Tax	Net	Serial No
AMD-HP1...	AMD HP 1800			1 UNITS	\$55.00	\$55.00			\$55.00	

Points

10. You can see the points will be deducted automatically if the customer redeem the point

Customers

Customer Name: DELL COMPUTER SDN. BHD.

Customer Categories:

Control Account: 700-0002

Customer #: 700-0001

Registration #:

Status: ACTIVE

Start Date: 14/12/2011

Category: USER

Group:

Group Company:

Sales Tax Ring No.:


Service Tax Ring No.:

Point Category: NORMAL

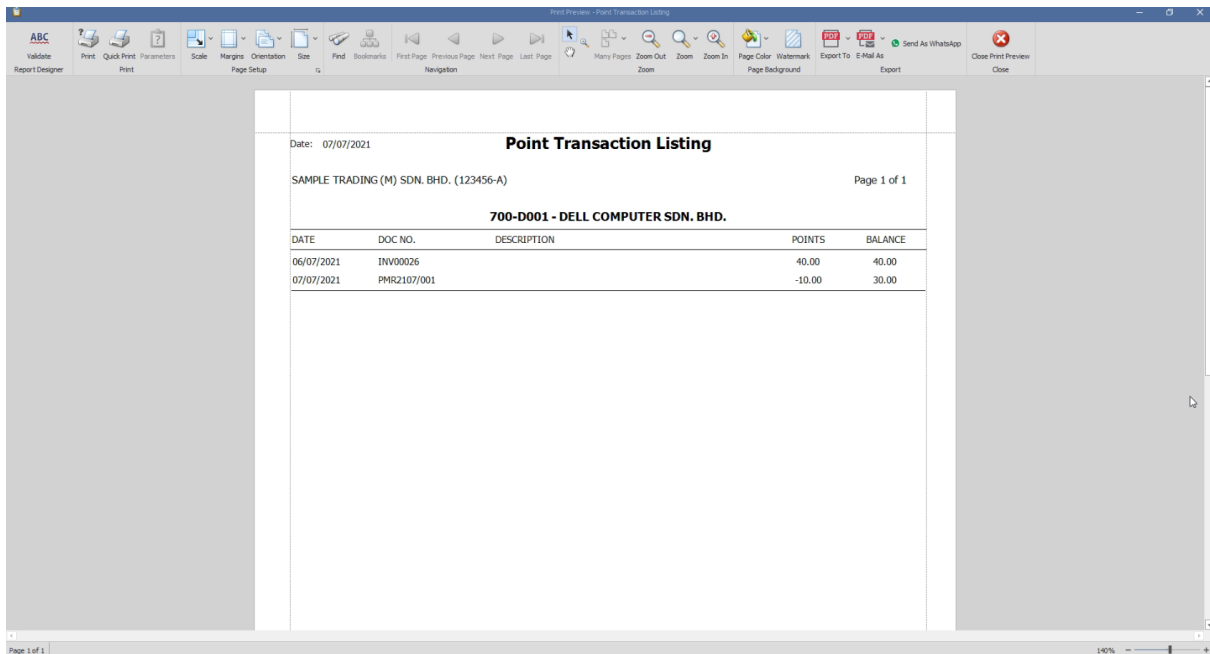
Status: ACTIVE

Point Expired:

Total Points: 10.00

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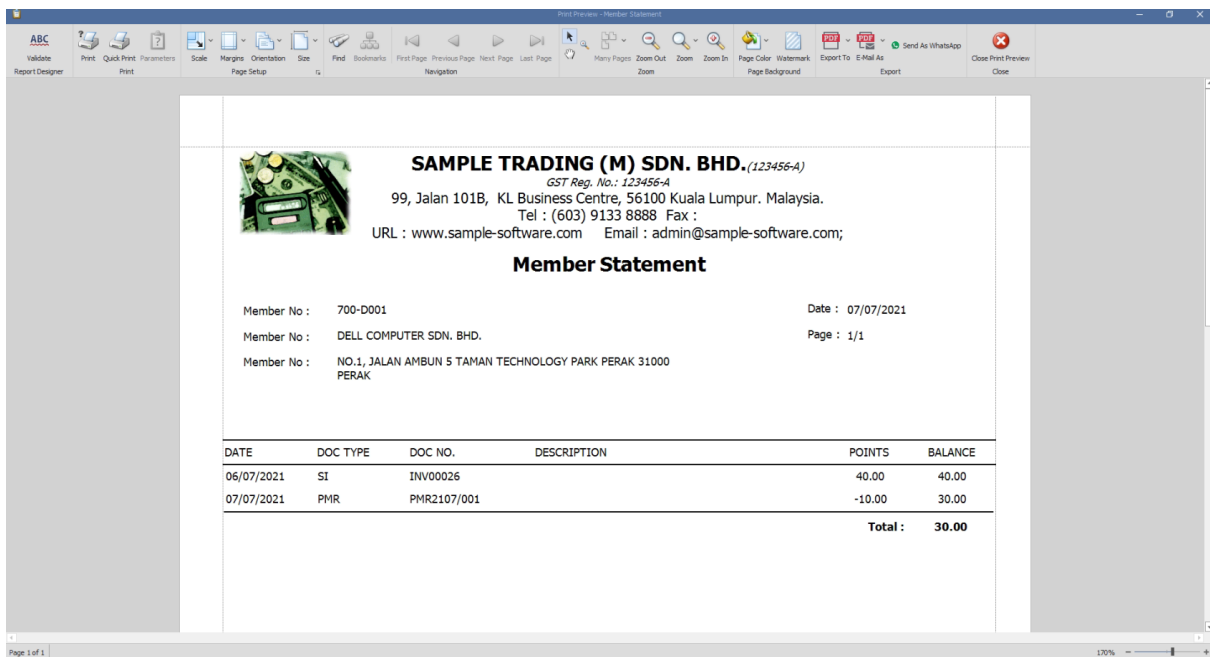
11. Click View->Reports-> Point Reports-> Point Transaction, you can view all the points that the customer earns and redeems.



The screenshot shows the 'Point Transaction Listing' report for the date 07/07/2021. The report is for 'SAMPLE TRADING (M) SDN. BHD. (123456-A)' and is page 1 of 1. The member ID is '700-D001 - DELL COMPUTER SDN. BHD.'. The report lists two transactions:

DATE	DOC NO.	DESCRIPTION	POINTS	BALANCE
06/07/2021	INV00026		40.00	40.00
07/07/2021	PMR2107/001		-10.00	30.00

12. Click View->Reports-> Point Reports-> Point Statement, you can view all the points that the customer earns and redeems in details.



The screenshot shows the 'Member Statement' report for the date 07/07/2021. The report is for 'SAMPLE TRADING (M) SDN. BHD. (123456-A)' and is page 1 of 1. The member ID is '700-D001'. The report lists two transactions:

DATE	DOC TYPE	DOC NO.	DESCRIPTION	POINTS	BALANCE
06/07/2021	SI	INV00026		40.00	40.00
07/07/2021	PMR	PMR2107/001		-10.00	30.00
Total :				30.00	



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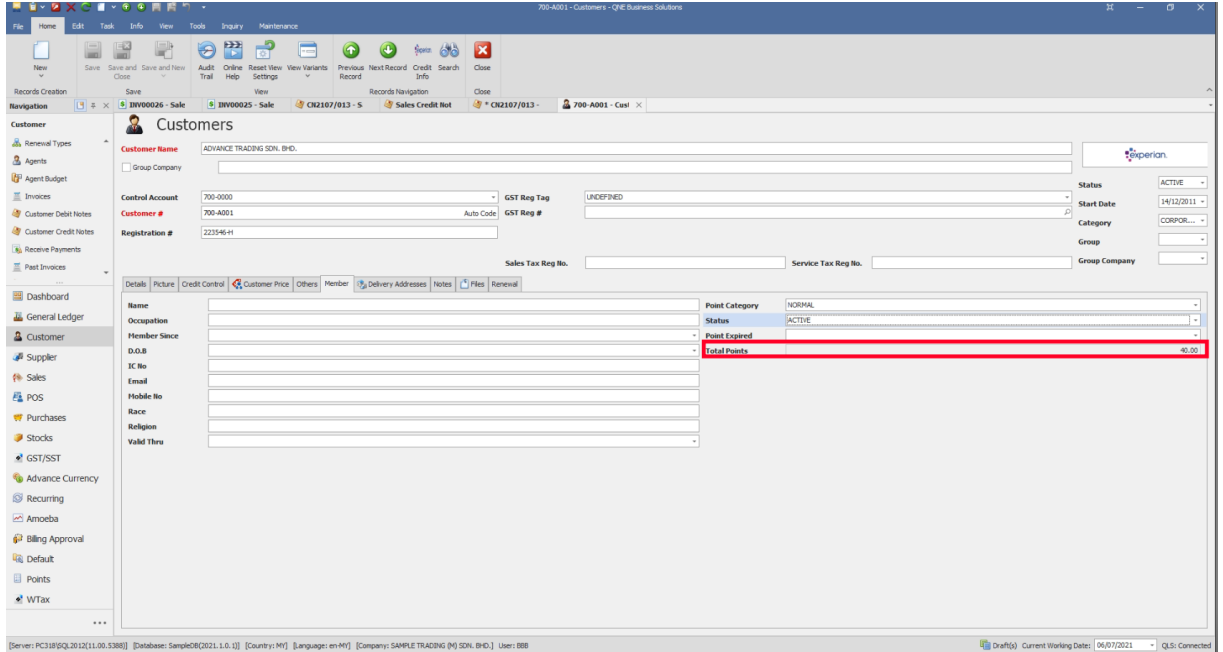
13. If there is a sales return, user need to issue Sales Credit Note to customer, the points that allocated to the customer before will be deducted also.

The screenshot shows the 'Sales Credit Notes' form in QNE Software. The form is titled 'Sales Credit Notes' and has a 'Details' tab selected. The 'Customer' field is set to '700-0001'. The 'To' field is set to 'DELL COMPUTER SDN. BHD.'. The 'Doc Date' is '07/07/2021'. The 'Credit Note No.' is 'CH2107/013'. The 'Reference No.' is '00000000'. The 'Exchange Rate' is '1.00000000'. The 'Attention' is 'HILYOW'. The 'Agent' is 'SAM'. The 'Tax Inclusive' checkbox is checked. The 'Rounding' checkbox is unchecked. The 'Details' tab shows a table with columns: 'P. Desc', 'Batch No', 'Qty', 'UNIT', 'Linet P', 'Disc', 'Amount', 'Commission', 'Tax C.', 'Tax', 'Net', 'Point', 'Total P', and 'Serial No'. The table contains one row with 'AMD IP 100' and '1 UNITS'. The 'Amount' is '685.00'. The 'Tax' is '41.10'. The 'Net' is '726.10'. The 'Point' is '50.00'. The 'Total P' is '50.00'. The 'Serial No' is '00000000'. The 'Taxable' section shows 'Taxable' as '685.00' and 'Tax' as '41.10'. The 'Rounding Adj' is '0.00'. The 'Due Amount' is '726.10'. The 'Total Points' is '50.00'. The status bar at the bottom shows 'Server: PC18FSQL2012(11.00.5386) [Database: SampleDB(2021.1.0.1)] [Country: MY] [Language: en-MY] [Company: SAMPLE TRADING (M) SDN. BHD.] User: B88'.

14. The total points of the customer are 50.00 before the sales credit note is saved.

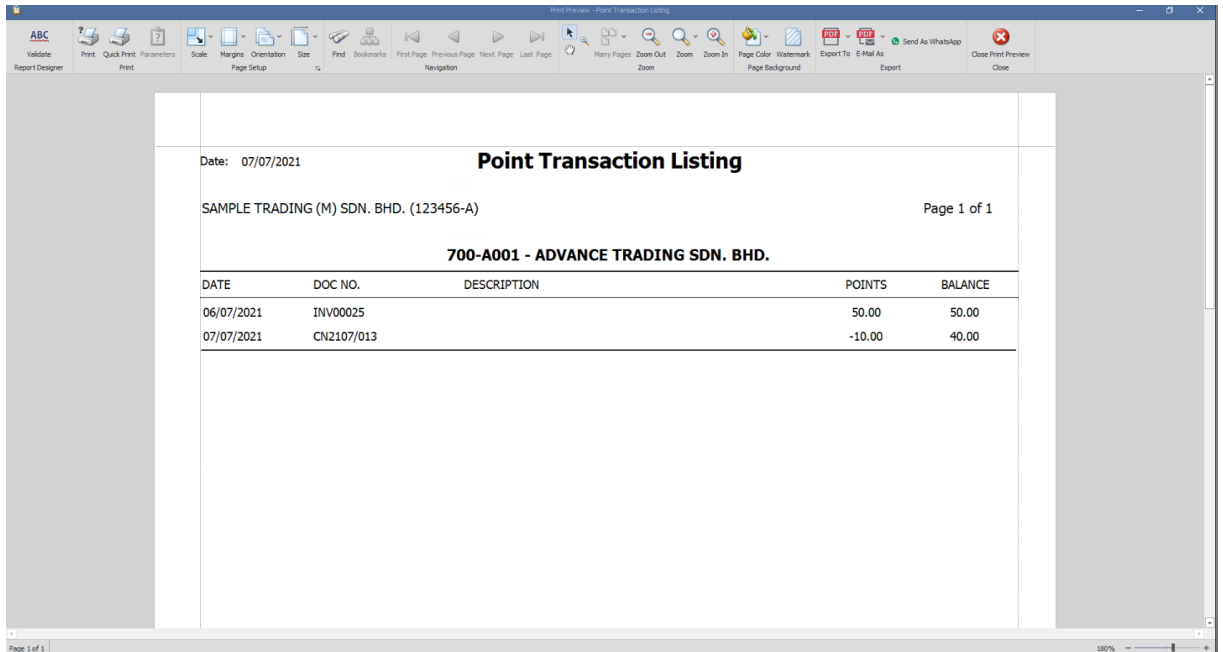
The screenshot shows the 'Customers' form in QNE Software. The form is titled 'Customers' and has a 'Details' tab selected. The 'Customer Name' is 'ADVANCE TRADING SDN. BHD.'. The 'Control Account' is '700-0000'. The 'GST Reg Tag' is 'UNDEFINED'. The 'Customer #' is '700-0001'. The 'GST Reg #' is '00000000'. The 'Registration #' is '222546-H'. The 'Sales Tax Reg No.' is '00000000'. The 'Service Tax Reg No.' is '00000000'. The 'Status' is 'ACTIVE'. The 'Start Date' is '14/12/2011'. The 'Category' is 'CORPOR...'. The 'Group' is '00000000'. The 'Group Company' is '00000000'. The 'Details' tab shows a table with columns: 'Name', 'Occupation', 'Member Since', 'D.O.B', 'IC No', 'Email', 'Mobile No', 'Race', 'Religion', and 'Valid Thru'. The table contains one row with 'Name' as 'ADVANCE TRADING SDN. BHD.'. The 'Point Category' is 'NORMAL'. The 'Status' is 'ACTIVE'. The 'Point Expired' is '00000000'. The 'Total Points' is '50.00'. The status bar at the bottom shows 'Server: PC18FSQL2012(11.00.5386) [Database: SampleDB(2021.1.0.1)] [Country: MY] [Language: en-MY] [Company: SAMPLE TRADING (M) SDN. BHD.] User: B88'.

15. The total points of the customer become 40.00 after the sales credit note is saved.



The screenshot shows the 'Customers' form in the QNE Optimum software. The 'Total Points' field is highlighted in red and shows a value of 40.00. The form includes fields for Customer Name, Control Account, Customer #, Registration #, Sales Tax Reg No., Service Tax Reg No., Point Category, Status, Start Date, Category, Group, and Group Company. The 'Total Points' field is located at the bottom right of the form.

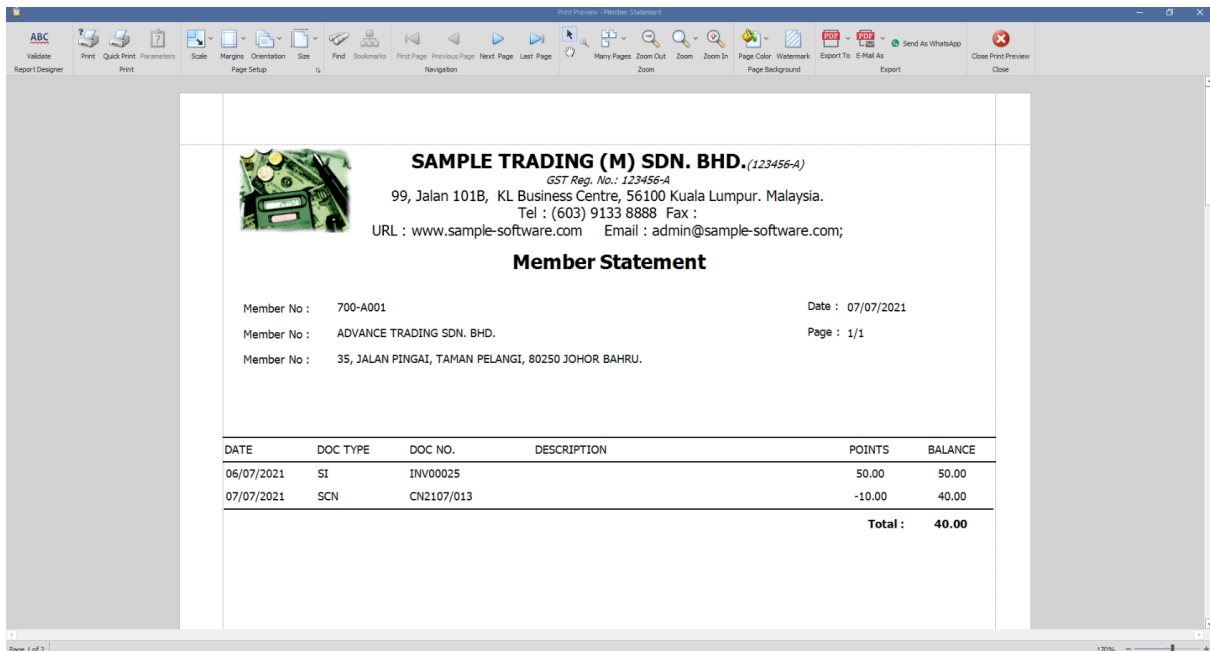
16. Click View->Reports-> Point Reports-> Point Transaction, you can view the point details of the customer.



The screenshot shows the 'Point Transaction Listing' report. The report includes a header with the date 07/07/2021 and the company name SAMPLE TRADING (M) SDN. BHD. (123456-A). The report is titled 'Point Transaction Listing' and is Page 1 of 1. The report shows a table with columns: DATE, DOC NO., DESCRIPTION, POINTS, and BALANCE. The data includes a sale on 06/07/2021 and a credit note on 07/07/2021.

DATE	DOC NO.	DESCRIPTION	POINTS	BALANCE
06/07/2021	INV00025		50.00	50.00
07/07/2021	CN2107/013		-10.00	40.00

17. Click View->Reports-> Point Reports-> Point Statement, you can view the point details of the customer in details.



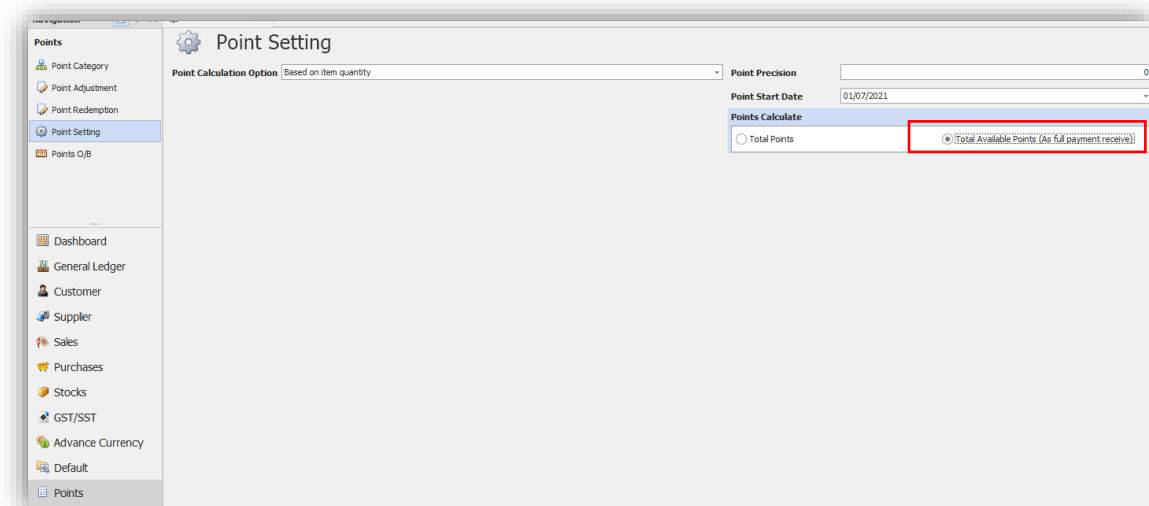
SAMPLE TRADING (M) SDN. BHD. (123456-A)
 GST Reg. No.: 123456-A
 99, Jalan 101B, KL Business Centre, 56100 Kuala Lumpur, Malaysia.
 Tel : (603) 9133 8888 Fax :
 URL : www.sample-software.com Email : admin@sample-software.com;

Member Statement

Member No : 700-A001 Date : 07/07/2021
 Member No : ADVANCE TRADING SDN. BHD. Page : 1/1
 Member No : 35, JALAN PINGAI, TAMAN PELANGI, 80250 JOHOR BAHRU.

DATE	DOC TYPE	DOC NO.	DESCRIPTION	POINTS	BALANCE
06/07/2021	SI	INV00025		50.00	50.00
07/07/2021	SCN	CN2107/013		-10.00	40.00
Total :				40.00	

18. Notice that the above setting is based on Total Points, for user who wants to calculate point upon payment receive, please tick this option



Point Setting

Point Calculation Option: Based on item quantity

Point Precision: 0

Point Start Date: 01/07/2021

Points Calculate

☐ Total Points ☒ Total Available Points (As full payment receive)

Contact us if you are interested to add on this module <https://www.qne.com.my/sales-enquiry/>