

Step 1: Open Site Watch

SITE-WATCH
Slaughter, Tyler @ CMLXTN-1RH

- Dashboard
- Financial Reports
- Inventory Reports
- Loyalty Promotion Reports
- Operations Reports
- Pass Plan Reports
- Prepaid Reports
- Labor Reports
- Sale Viewer
- Customers
- Configuration
- Help
- Sign Out

CMLXTN


Open New Tab | All Sites | Help

Dashboard Wednesday, 12/18/2019 9:09 PM

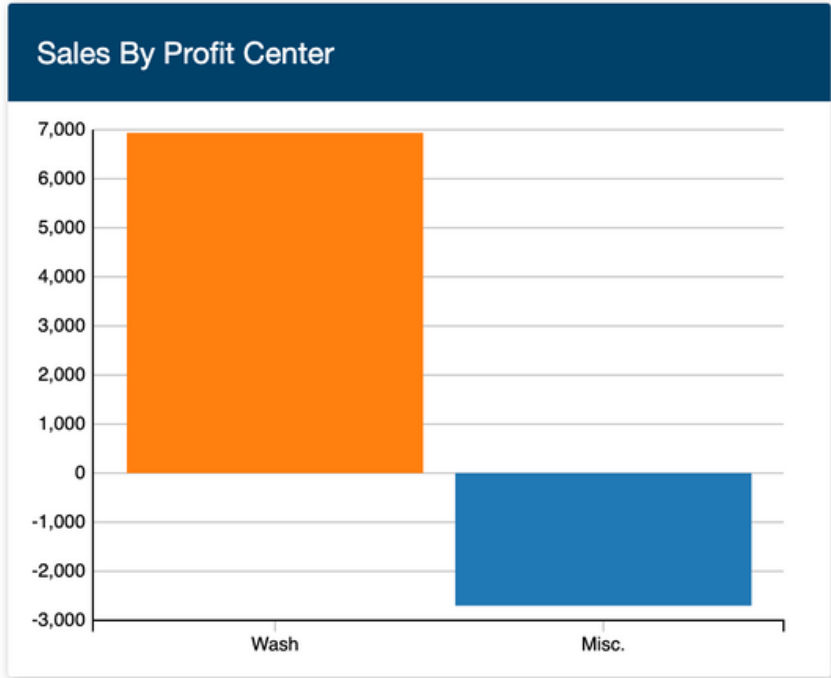
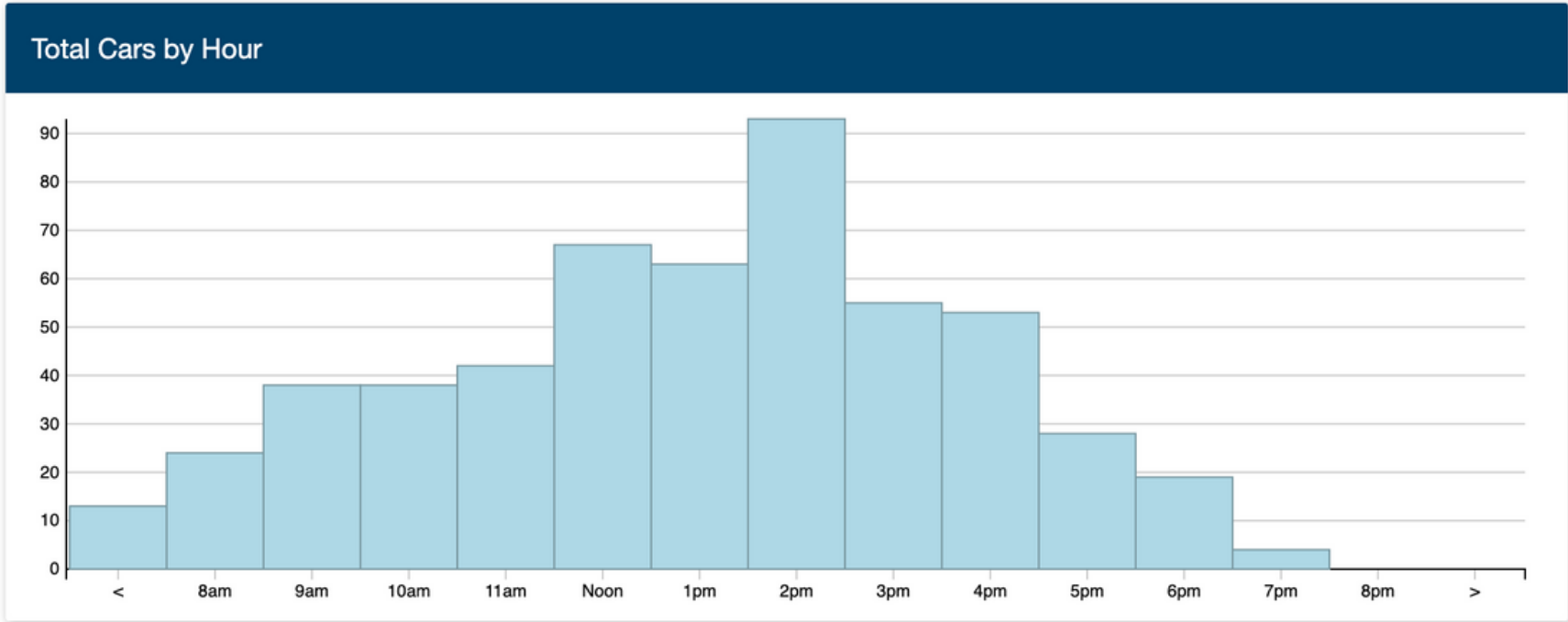

537
Total Cars




31°
Current Weather
Feels like: 31°
Wind: N at 7 mph



278 (52%)
Pass Washes
Plans Sold Today 28
Plans Lost Today 5



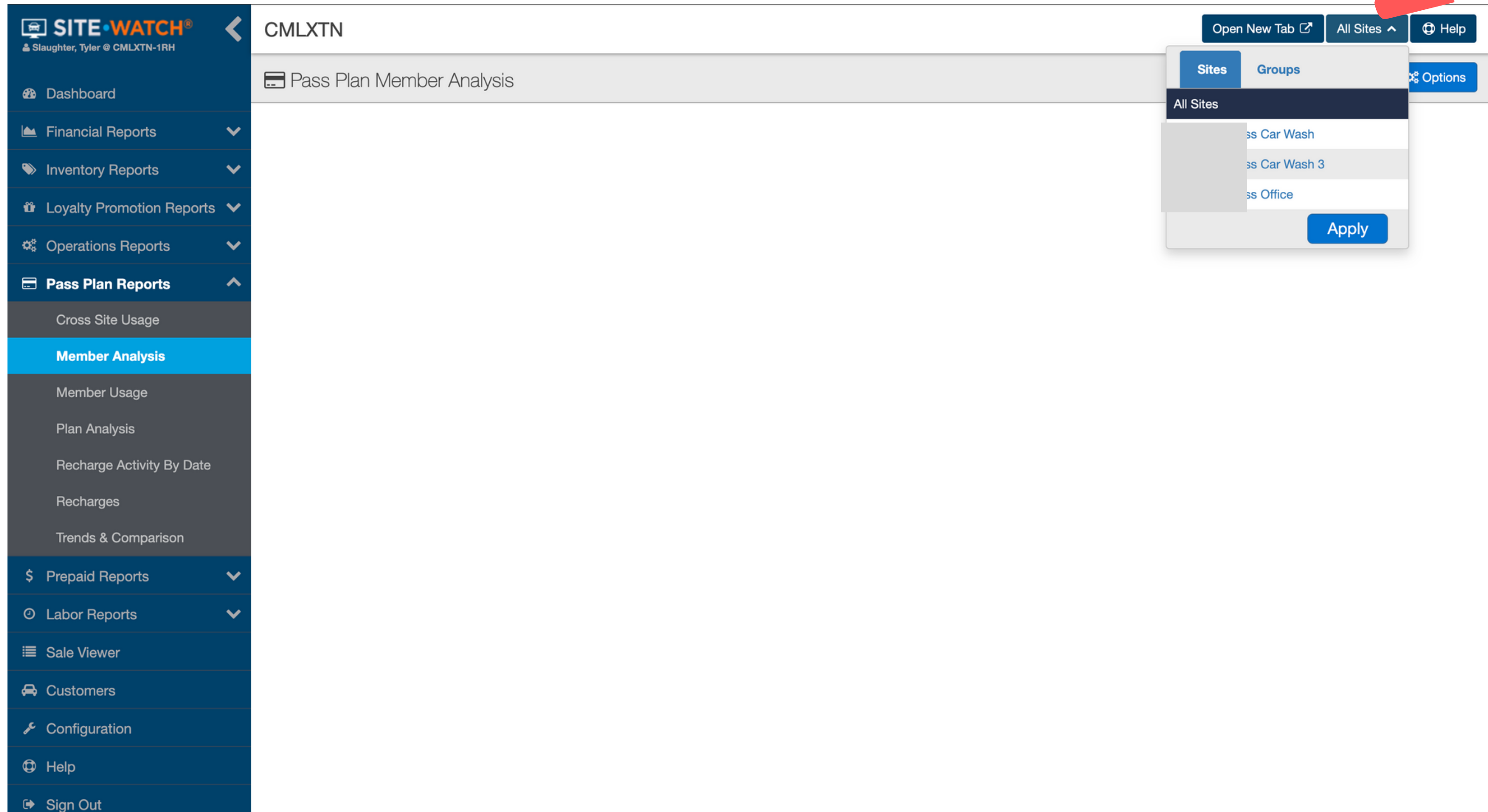
13
Employees Working



Step 2: Choose Member Analysis

The screenshot displays the SITE-WATCH web application interface. The top navigation bar includes the SITE-WATCH logo, the user name 'Slaughter, Tyler @ CMLXTN-1RH', and the site name 'CMLXTN'. On the right side of the top bar are buttons for 'Open New Tab', 'All Sites', and 'Help'. Below the top bar is a secondary navigation bar with 'Pass Plan Member Analysis' and buttons for 'Export/Print' and 'Options'. The left sidebar contains a navigation menu with the following items: Dashboard, Financial Reports, Inventory Reports, Loyalty Promotion Reports, Operations Reports, Pass Plan Reports (expanded), Cross Site Usage, Member Analysis (highlighted with a red arrow), Member Usage, Plan Analysis, Recharge Activity By Date, Recharges, Trends & Comparison, Prepaid Reports, Labor Reports, Sale Viewer, Customers, Configuration, Help, and Sign Out. A filter overlay is visible on the right side of the main content area, containing three dropdown menus: 'Status' (set to '<All Statuses>'), 'Plan' (set to '<All Plans>'), and 'Group or Individual' (set to 'Both Groups and Individuals'). An 'Apply' button is located at the bottom right of the filter overlay.

Step 3: Choose All Sites or just the sites you want.



The screenshot displays the SITE-WATCH application interface. The top navigation bar includes the SITE-WATCH logo, a user profile for Tyler Slaughter, and the organization name CMLXTN. The main content area is titled 'Pass Plan Member Analysis'. On the right side, there is a dropdown menu for 'All Sites' with a red arrow pointing to it. The dropdown menu is open, showing the following options: 'All Sites', 'ss Car Wash', 'ss Car Wash 3', and 'ss Office'. An 'Apply' button is located at the bottom of the dropdown menu. The left sidebar contains various navigation options, including 'Dashboard', 'Financial Reports', 'Inventory Reports', 'Loyalty Promotion Reports', 'Operations Reports', 'Pass Plan Reports', 'Cross Site Usage', 'Member Analysis', 'Member Usage', 'Plan Analysis', 'Recharge Activity By Date', 'Recharges', 'Trends & Comparison', 'Prepaid Reports', 'Labor Reports', 'Sale Viewer', 'Customers', 'Configuration', 'Help', and 'Sign Out'.

Step 4: Choose All Problem Statuses

The screenshot shows the SITE-WATCH web application interface. The top navigation bar includes the SITE-WATCH logo, user information (Slaughter, Tyler @ CMLXTN-1RH), and navigation links for 'Open New Tab', 'All Sites', and 'Help'. The main header displays 'CMLXTN' and 'Pass Plan Member Analysis', with 'Export/Print' and 'Options' buttons. A left sidebar contains a menu with categories like 'Dashboard', 'Financial Reports', 'Inventory Reports', 'Loyalty Promotion Reports', 'Operations Reports', 'Pass Plan Reports', 'Cross Site Usage', 'Member Analysis', 'Prepaid Reports', 'Labor Reports', 'Sale Viewer', 'Customers', 'Configuration', 'Help', and 'Sign Out'. The 'Member Analysis' section is expanded, showing sub-items like 'Member Usage', 'Plan Analysis', 'Recharge Activity By Date', 'Recharges', and 'Trends & Comparison'. A dropdown menu for 'Status' is open, listing options: '<All Statuses>', '<All Non-Problem Statuses>', '<All Problem Statuses>', 'Recharge Errors', 'Credit Card Expiring', 'Credit Card Declined', 'Credit Card Updated', 'Discontinuing', 'Discontinued', and 'Terminated'. The '<All Problem Statuses>' option is highlighted in blue. A large red arrow points from the center of the screen towards this dropdown menu. An 'Apply' button is located at the bottom right of the dropdown.

Step 5: Export / My Computer / CSV / ALL Columns

The screenshot displays the SITE-WATCH Pass Plan Member Analysis interface. The left sidebar contains navigation options such as Dashboard, Financial Reports, Inventory Reports, Loyalty Promotion Reports, Operations Reports, Pass Plan Reports, Member Analysis, and Prepaid Reports. The main content area shows a table of member data with columns for Customer Name, Customer Code, Plan Name, Plan Status, Recharge Status, Recharge Site, Credit Card, Credit Card Status, and Last Used Date. An 'Export/Print' button is visible in the top right corner. A red arrow points to the 'Export/Print' button, and another red arrow points to the 'Export Location' dropdown menu. The 'Export Location' menu is open, showing options for 'My Computer' (selected), 'Google Drive', and 'File Format' options: 'Excel', 'CSV' (selected), and 'PDF (Printer-friendly version)'. The 'Export Columns' section is also open, showing 'All' (selected) and 'None' options, along with a list of columns to include in the export: 'Credit Card Info', 'Washes Left', 'Joined Date', 'Recharge Date', 'Last Used Date', 'Members', and 'Group Leader'. An 'Export' button is located at the bottom of the menu. A third red arrow points to the 'Export' button. A fourth red arrow points to the 'All' option in the 'Export Columns' section. A vertical blue highlight is present on the 'Credit Card' column in the table.

Customer Name	Customer Code	Plan Name	Plan Status	Recharge Status	Recharge Site	Credit Card	Credit Card Status	Joined Date	Last Used Date	
ZILIO,JESSE	72917+073128	New ARM Wheel Deal	Discontinued		CMLXTN-1RH		Good	04	11-26-2019	
YUNKER,DIANNE F	70599+654545	Unlimited Ult Camel	Discontinued		CMLXTN-1RH		Good	03	10-26-2019	
YOUNG,RUTH	62872+770818	Unlimited Ult Camel	Terminated	Card Declined	CMLXTN-1RH			09		
YOUNG,JOHNNY	61983+709442	New ARM Wheel Deal	Expired		CMLXTN-1RH		Good	10		
YOUNG,JOHNNY	72597+781726	New ARM Wheel Deal	Expired		CMLXTN-1RH		Good	10	11-09-2019	
YOUNG,CHRIS	82916+876520	New ARM Wheel Deal	Renewed	Card Declined	CMLXTN-1RH		Good	07	11-24-2019	
YOU,A GIFT FOR	419VGQ-MS	New ARM Wheel Deal	Joined	Card Declined	CMLXTN-1RH			10	11-13-2019	
WYNN,STEPHANIE	84047+175938	Unlimited Ult Camel	Expired		CMLXTN-1RH		Good	09	10-11-2019	
WYNN,AARON E	3D30X5-TN	New ARM Wheel Deal	Expired		CMLXTN-1RH		Expiring Soon!	04	10-11-2019	
WORTHY,COREY A	62302+411010	New ARM Wheel Deal	Discontinued		CMLXTN-1RH		Good	08	10-06-2019	
WORLDS,AMANDA	92883+387624	New ARM Wheel Deal	Renewed	Card Declined	CMLXTN-1RH		Good	04	11-16-2019	
WOODS,TERRIENNA W	60373+031170	Unlimited Ult Camel	Renewed	Card Declined	CMLXTN-1RH		Good	09	12-06-2019	
WOODBERRY,TIERNEY	92581+135582	New ARM Wheel Deal	Discontinued		CMLXTN-1RH		Good	01	09-19-2019	
WOODARD,LARONDA	22663+252113	New ARM Wheel Deal	Renewed	Card Declined	CMLXTN-1RH		Good	08	12-12-2019	
WOOD,TIMOTHY B	Y4393H-MS	Unlimited Ult Camel	Discontinued		CMLXTN-1RH		Good	11-02-2018	12-02-2019	11-12-2019
WOMACK,WILLIAM	9H30K5-TN	New ARM Wheel Deal	Discontinued		CMLXTN-1RH		Good	10-17-2019	11-17-2019	10-24-2019
WIMLEY,CIARA R	72564+620520	New ARM Wheel Deal	Expired		CMLXTN-1RH		Good	04-17-2019	10-17-2019	10-12-2019
WILSON,DONTE	8R81Y3-TN	New ARM Wheel Deal	Expired		CMLXTN-1RH		Good	07-05-2019	11-05-2019	10-04-2019
WILSON,CLARICE N	72084+307202	New ARM Wheel Deal	Renewed	Card Declined	CMLXTN-1RH		Good	11-23-2018	12-12-2019	09-28-2019
WILSON,ASHLEY	12956+722434	New ARM Wheel Deal	Expired		CMLXTN-1RH		Good	08-24-2019	10-24-2019	10-04-2019
WILLIAMS,TRAE	21832+714498	New ARM Wheel Deal	Expired		CMLXTN-1RH		Good	07-29-2019	09-29-2019	09-27-2019
WILLIAMS,TRAE	34097+638658	New ARM Wheel Deal	Expired		CMLXTN-1RH	443264x1069	Good	07-08-2019	10-08-2019	09-20-2019

Step 7: Email Reports to ccc@optspot.com

Notice the logo in my signature.
You'll want to remove any logos when sending the file in.



Subject does not matter

Levi McClendon (CCC@optspot.com)


Subject does not matter

This message does not matter either. What's important is to make sure your logo does not come through as an attachment.

Send just one attachment at a time.

Make sure to let OptSpot know if you will be sending the reports in from different email addresses as we need to set the filter for each email this report will be coming from.

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 OptSpot
market smarter

Levi McClendon
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direct | 602.920.0094
email | levi@optspot.com

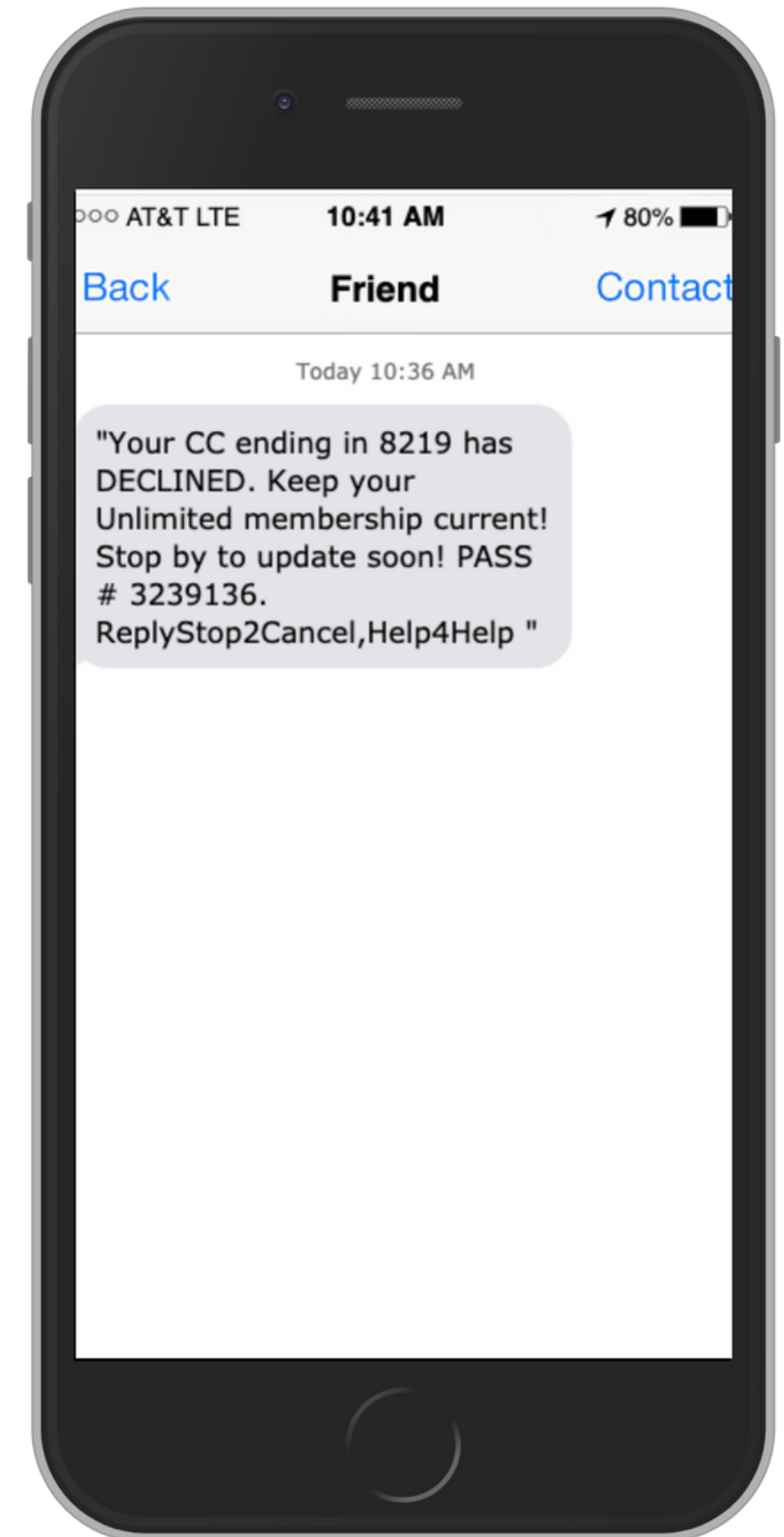
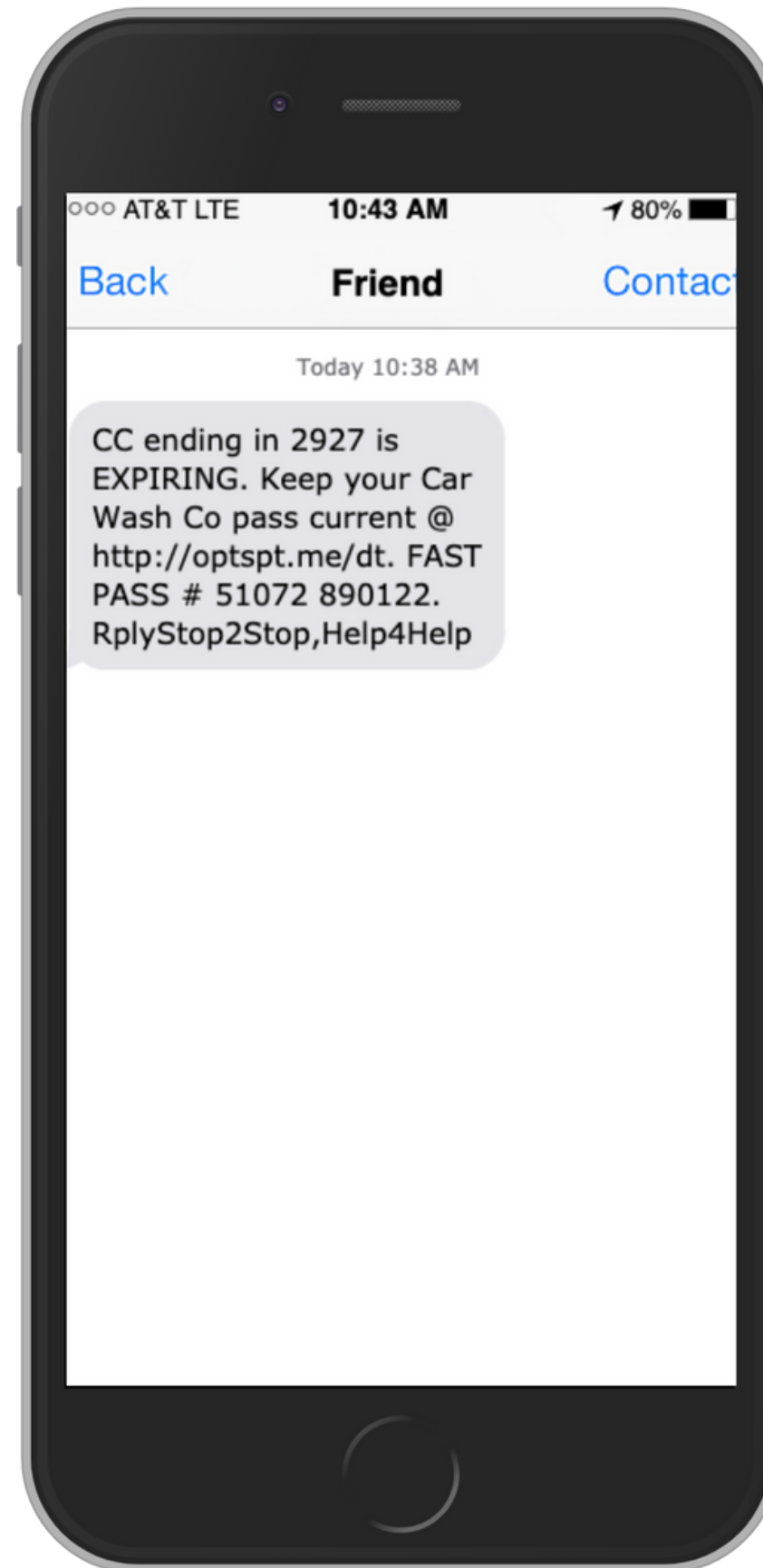
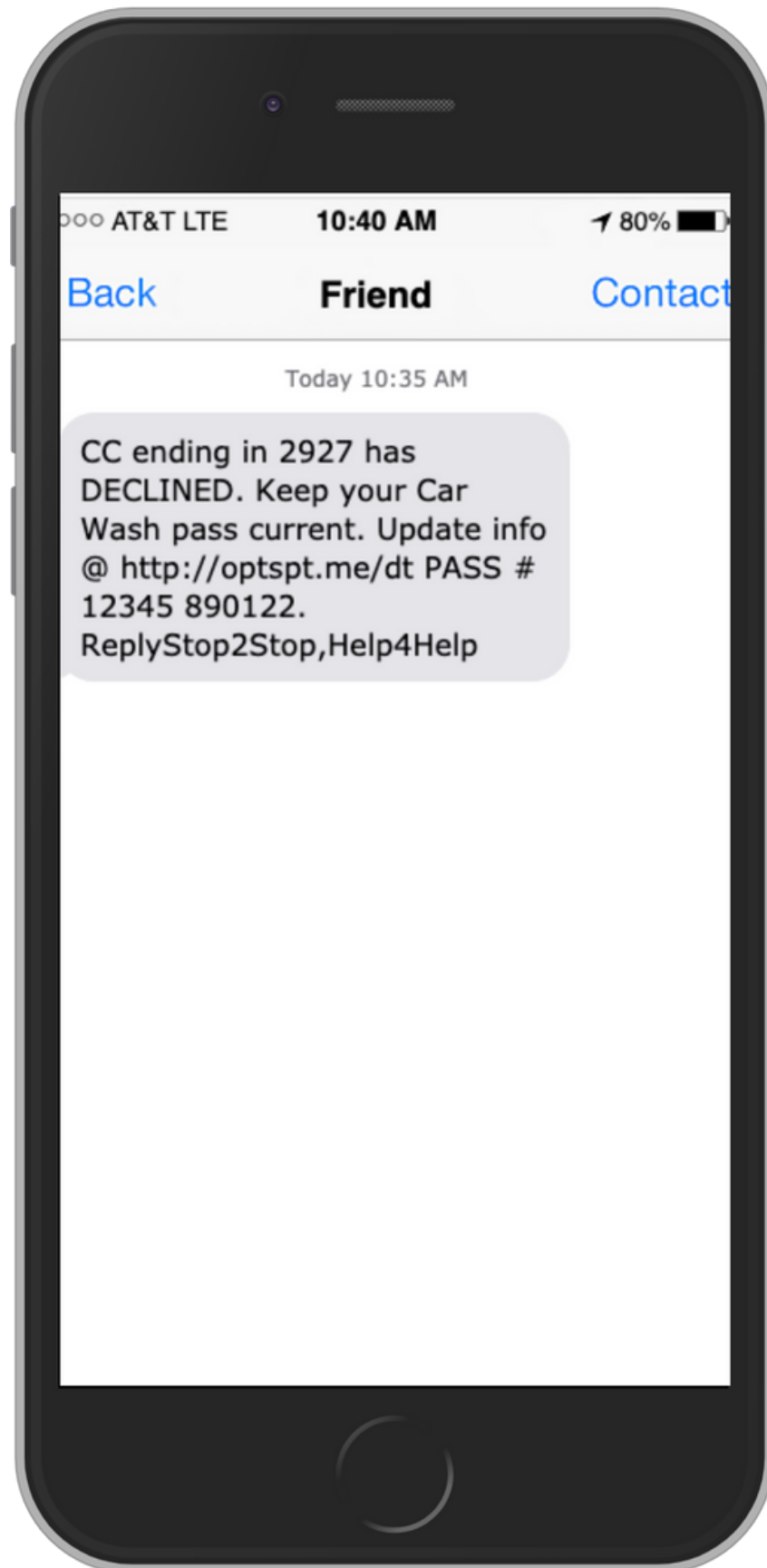
member-analysis-Report_2019-12-18.csv (148K)

Sans Serif | Bold | Italic | Underline | Text Color | Paragraph | Bulleted List | Numbered List | Indent Left | Indent Right

Send | Attach | Text Color | Link | Emoticon | Image | Video | Currency

Send Later | Boomerang this | In 2 days | if no reply | ?

Here are sample messages that will be sent to your customers.



Key Points

Email subject line does not matter

Body of the message does not matter

Send just ONE attachment at a time

Make sure your logo is not being sent as an attachment

Texts will be sent to your customers within 10 min of
your email being sent to ccc@optspot.com

MAKE SURE OPTSPOT IS AWARE OF EACH EMAIL
ADDRESS IN WHICH THE REPORT WILL BE SENT FROM.
WE SET FILTERS FOR THESE EMAIL ADDRESSES, SO
JUST KEEP US UP TO DATE.