



Version 1

Admin Area – Checking A Customer's Balance

THE LOYALTY BOX is a combination of world-class technology, backed by a professional support team ensuring that your program is a success.

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How to Check a Customer's Balance

1. Roll your mouse over "Reports"

Home	Clients	Programs	Groups	Value Types	Reports	Rules	Campaigns	Users	Roles	Admin
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2. Select "Transaction Report"

Transaction Report

Search:
Filter by card number, cell number, trans id, req id

Location:
Filter by location

--All Locations-- ▼

Date From:
Enter the from date

2015/10/16

Date To:
Enter the to date

2015/10/16

Show **Export Transactions**

3. Enter the cell or card number that you wish to query
4. Select the date range of the transactions
5. Click "Show"

Transaction Totals Summary

Operation	Transactions	Amount
Promotion Redemption (Uncommitted)	1	0
Promotion Redemption (Committed)	1	0
Gift Issuance	2	550.00
Enrollment	1	
Account History	1	0

Transactions between 2015/10/01 and 2015/10/16

Trans #	Req #	Emp #	Card #	Card Set	Location	Source	Customer	Cell #	Error	Type	Amount	Voucher	Status	Processed
19252277	19252271	0	420620562271300	Test Card Set	Sam's Demo Store	Web Terminal				Gift Issuance	R 50.00	0	Transaction Approved	2015-10-15 14:11:44
19252276	19252271	0	420620562271300	Test Card Set	Sam's Demo Store	Web Terminal				Promotion Redemption (Committed)	0.0000	0	Transaction Approved	2015-10-15 14:11:44
19252271	19252271	0	420620562271300	Test Card Set	Sam's Demo Store	Web Terminal				Promotion Redemption (Uncommitted)	0.0000	0	Transaction Approved	2015-10-15 14:11:22
19118224	10118224	0	552538877563163	Test Card Set	Sam's Demo Store	Web Terminal	Sam de la Porte	27823409114		Account History	0.0000	0	Transaction Approved	2015-10-10 13:39:47
19117980	10117980	0	552538877563163	Test Card Set	Sam's Demo Store	Web Terminal	Sam de la Porte	27823409114		Gift Issuance	R 500.00	0	Transaction Approved	2015-10-10 13:27:18
19117952	19117952	0	552538877563163	Test Card Set	Sam's Demo Store	Web Terminal	Sam de la Porte	27823409114		Enrollment	1.0000	0	Transaction Approved	2015-10-10 13:26:16

6. Click on the customer's card number

7. Click the "Customer Balance" tab

Customer Information

CUSTOMER DETAILS	CUSTOMER BALANCE	CUSTOMER CARDS	CUSTOMER VOUCHERS	CUSTOMER TRANSFER
Customer Details				
View Program Fields				
Firstname: Enter firstname	<input type="text" value="Sam"/>			
Middle Name: Enter middle name	<input type="text"/>			
Address 1: Enter address	<input type="text"/>			
City: Enter city	<input type="text"/>			
Postal Code: Enter postal code	<input type="text" value="1724"/>			
Cell Phone No.: Enter cell phone number	<input type="text" value="27823469114"/>			
Date of Birth: Enter customer date of birth	<input type="text" value="20030918"/>			
Accept Email Marketing: Select option	<input checked="" type="checkbox"/>			
Accept Phone Calls: Select option	<input type="checkbox"/>			
Location: Select a parent location	<input type="text" value="Sam's Demo Store"/>			

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8. You will see the customer's points, voucher, or ZAR balance here (whichever is applicable to your loyalty program)

Customer Information

CUSTOMER DETAILS	CUSTOMER BALANCE	CUSTOMER CARDS	CUSTOMER VOUCHERS	CUSTOMER TRANSFER		
Customer Balance						
Program:	<input type="text" value="All"/>					
Locations:	<input type="text" value="All"/>					
PROGRAM	CARD	LOCATION	VOUCHER	VALUE TYPE	BALANCE	
Sam's Demo Loyalty Program	552538877563163	All	No	ZAR	R 500.00	Balance History

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Support

If you have any questions, please contact The Loyalty Box.

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