Loyalty Customer Directory FAQs

General Information

1. **What is the Customer Directory?**

   It is a self-service loyalty management tool for merchants. It replaces many manual support-driven workflows by letting managers search loyalty members, inspect balances, review loyalty activity, make balance corrections, and transfer loyalty value between accounts.

2. **Which customers appear in the directory?**

   The directory shows only customers who have a loyalty account for the specific store. This includes customers who were enrolled through supported loyalty flows such as store loyalty enrollment, app or storefront sign-up, POS enrollment, or relevant opt-in/enrollment flows tied to loyalty records.

3. **Is customer information store-specific?**

   Yes, with a clear distinction: while a customer's profile identity (such as name, phone number, and email) is recognized consistently across the platform, their loyalty activity—including point balances and club rewards—is store-specific and unique to each shopping location.

4. **Can a customer belong to more than one store?**

   Yes. A customer may shop at multiple stores, but each store maintains its own independent loyalty context and balances for that customer.

5. **What information appears in the customer list?**

   The main list is designed to show key customer information such as mobile number, name, email, points, club rewards earned, and store messaging opt-in status.

6. **If a customer is in the directory, does that mean I can send them messages?**

   Not necessarily. Being in the directory means the customer is a loyalty member for your store. Messaging eligibility is handled separately and depends on the customer's **Store Messaging Opt-in** status**.**

7. **What does the Store Messaging Opt-in badge mean?**

   It indicates whether the customer is currently opted in to receive **store deals messaging**. The three badge states are, **Opted-In, Opted-Out,** and **Not Opted-In**.

8. **What is the difference between points and clubs?**

   Points are a numeric balance that can unlock rewards based on the store's points programs.

   Clubs are punch-card style balances that track progress toward specific club milestone rewards.

   Both are part of the customer's store-specific loyalty value.

9. **What does "Member since" mean?**

   This indicates when the customer became a loyalty member in the system for that store.

10. **What are "Available Rewards"?**

    These are rewards the customer can redeem now, based on their current balance and active loyalty program rules.

11. **What are "Next Level Rewards?"**

    These are points-based rewards the customer has not yet unlocked but may earn if they accumulate more points while the program is active.

12. **What are "In Progress Clubs?"**

    These are club programs where the customer has started collecting punches or stamps but has not yet earned a reward.

13. **Is this feature available in multiple languages?**

    The feature is built with multilingual readiness in mind. English is the default language, and the system implementation is prepared for future localization.

Setup & Requirements

9. **Which platforms support the Customer Directory?**

    The primary experience is in the Merchant Portal. Panther is expected to use the responsive Merchant Portal interface. Direct POS support is planned for a later phase.

10. **Who can access Manage Customers?**

    Only users with **Manager** permissions can access the Customer Directory.

11. **Do I need a license to use it?**

    Access depends on your store's enabled products. Current rules indicate that a **Loyalty** license gives access to the Customer Directory, and a **CMC** license also grants access to the Customer Directory.

12. **Can I open Manage Customers before signing the CMC Terms of Service?**

    Yes, users can access the Loyalty Members page before signing the CMC Terms of Service. However, CMC-specific actions may still require the agreement when applicable.

13. **What information is required to add a new member?**

    The flow requires a mobile phone number first. If the number does not already exist, the form requires first name, last name, and email. Birthday is optional, and predefined customer notes may also be added.

How the Process Works

13. **How do I search for a customer?**

    Use the search field above the customer table. The search is designed to support lookup by phone number/email. Results filter the list so you can quickly open the customer's profile.

14. What can I see on a customer profile?

A profile is designed to show the customer's phone number, name, email, birthday, notes, points balance, clubs balance, available rewards, next-level rewards for points, in-progress clubs, and access to activity log, balance editing, transfer, and profile download actions.

15. Can I edit customer details?

Yes. Managers can edit customer details such as name, email, birthday, and customer notes from the profile page.

16. Can I manually add or remove loyalty points?

Yes. Managers can adjust points balances from the customer profile.

17. Can I manually add or remove club punches?

Yes. Managers can also adjust club balances, subject to rules that prevent reducing the customer below zero total earned punches.

18. Can I add a new Loyalty Member manually?

Yes. The feature includes an **Add New Loyalty Member** flow in Manage Customers.

19. Can I change the customer's phone number?

The phone number is treated as the primary identifier and is not editable. If a customer changed phone numbers, the current supported solution is the **transfer account** flow when applicable.

20. What reasons can I use for a balance adjustment?

The current planned reasons include customer compensation, human error, system or technical error, promotion or goodwill gesture, and other.

21. What does Transfer Account do?

It transfers the loyalty value from one phone number to another. This is mainly intended for cases where a customer changed phone numbers.

22. What is the Activity Log?

The Activity Log is the loyalty history for an individual customer. It is intended to show loyalty-related events such as earning points, redeeming rewards, receiving or sending transfers, and manual balance adjustments.

23. What details can I see in the Activity Log?

The log is designed to show date and time, activity type, loyalty type, basket ID when applicable, opening balance, transaction amount, and closing balance. Manual changes should also be auditable with the action context and reason.

24. Can I filter the Activity Log?

Yes. The design includes date-range filtering, with limits on the selectable range. It also supports filters by loyalty type and transaction type.

25. Can I download the Activity Log?

Yes. The Activity Log page is designed to support PDF download.

26. Can I add a customer from the transfer flow?

Sometimes. If the source account has **points only**, the transfer flow may allow adding a new customer manually. If clubs are involved, the destination may need to exist through app or storefront registration before the transfer can proceed.

27. Does the transfer move both points and clubs?

Partial transfers are not supported.

All loyalty values - including both points and club rewards - must be transferred together.

Please refer to the table below for specific exceptions regarding transfer eligibility:

Scenario	Conditions	System Action	UI Result
Scenario 1	Source has points and clubs; target exists; target is registered via app/website	Transfer everything successfully	SUCCESS
Scenario 2	Source has points and clubs; target exists; target was created manually only	Block transfer because clubs require app/website registration	CUSTOMER SIGN-IN REQUIRED
Scenario 3	Source has points and clubs; target does not exist	Block transfer and do not allow manual creation here	TARGET ACCOUNT NOT FOUND
Scenario 4	Source has points only; target does not exist or exists manually without app/website registration	Allow manual creation and transfer points	MANUAL ACTION ALLOWED

28. What happens to the old account after a transfer?

The source account balance is expected to go to zero, while the destination account receives the transferred amount. The activity history remains visible and both accounts should show transfer entries in the Activity Log.

29. **Are balance changes tracked?**
    Yes. All balance-changing actions are meant to be logged with the user, timestamp, impacted phone numbers, action type, amount, and reason.

Troubleshooting for support

19. **Why are some action buttons disabled on a customer's profile?**
    If the customer has no relevant loyalty program data available, some actions such as transfer, edit balance, or download may be disabled.

20. **Why do I need to enter a reason when changing a balance?**
    Balance-changing actions are auditable. The system requires a reason so the change can be logged clearly for future review and accountability.

21. **Why might a transfer be blocked?**
    Transfers may be blocked when clubs are involved and the destination account does not have the required app/storefront-backed customer record. In those cases, the customer may need to sign in through the Boss Local app or storefront using the new phone number first.

22. **Will customer notes appear in downloaded PDFs?**
    No. The requirements explicitly state that customer notes should not be printed in the downloaded profile PDF or Activity Log PDF.

23. **Why is the phone number so important in this feature?**
    The phone number is currently the primary identifier for loyalty membership. It is the key used to find, manage, and transfer loyalty accounts.

24. **What happens if the phone number already exists?**
    The system checks whether the number already exists in the loyalty system. If it does, the user is informed and prevented from creating a duplicate member.

25. **Can I reduce a balance below zero?**
    No, the system will prevent balances from going negative.