Customer Directory - Edit Loyalty Balance FAQ

General Information

1. **What is the purpose of the balance adjustment tool?**
   The balance adjustment tool allows merchants to manually update a member's loyalty balance to compensate customers or adjust their remaining balance.

2. **What is the "New Balance" preview?**
   As you adjust the arrows, the system displays a preview of what the customer's balance will be after the change:
   - Green: Indicates an increase in points/clubs.
   - Red: Indicates a decrease in points/clubs.

3. **How do club punches relate to rewards?**
   The system tracks "total punches," which includes punches already converted into club rewards plus progress toward the next one.
   - *Example:* If 10 punches = 1 reward, and a customer has 3 rewards and 5 punches, their total is 35 punches. You cannot deduct more than 35 punches.

Setup & Requirements

4. **Who can adjust balances?**
   Only users with Manager permissions can access and execute loyalty balance adjustments.

How the Process Works

5. **How do I grant or deduct points?**
   a. Open the customer's profile and navigate to the Points tab.
   b. Use the adjustment arrows to define the number of points you wish to add (plus) or remove (minus).

6. **How do I adjust club punches?**
   a. Navigate to the Clubs tab on the customer profile.
   b. You must first select a specific club from the dropdown before the adjustment arrows become active.
   c. Adjust the balance.

Troubleshooting for Support

7. **Can I deduct points/punches?**
   Yes, by using the minus button in the adjustment arrows to decrease the balance below its current number.

8. **Can a balance go negative?**
   No. The system blocks any adjustment that would result in a total balance below zero.

9. **Is it required to provide a reason for balance adjustments?**
   Yes. Every manual adjustment must have a reason selected from the predefined list to maintain an accurate audit log.