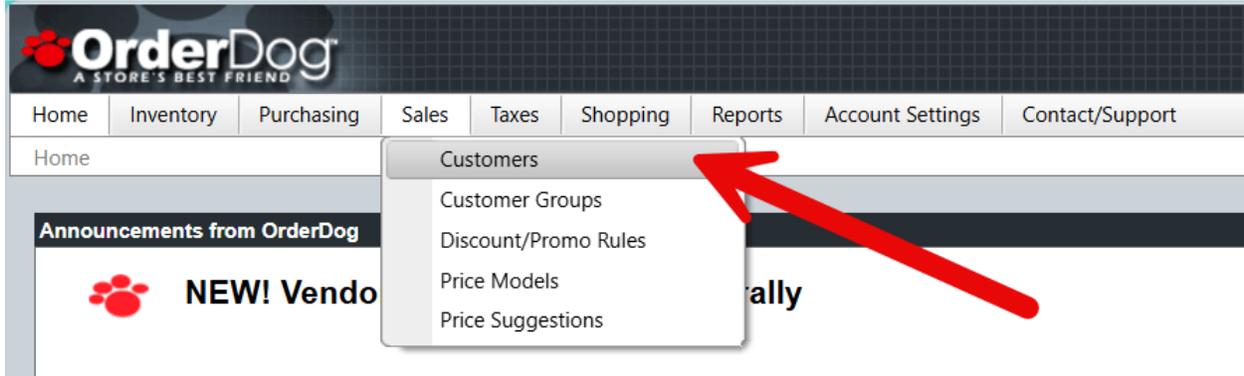




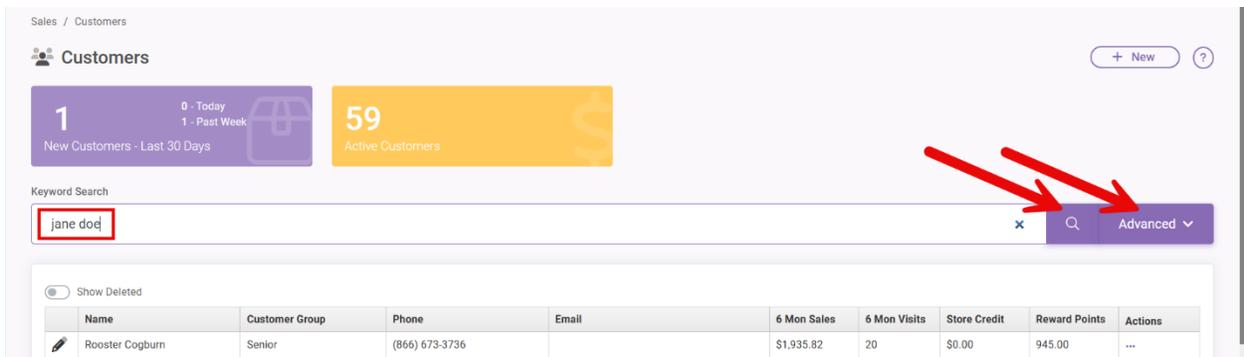
How to Adjust Reward Points

User Guide > Customer Records

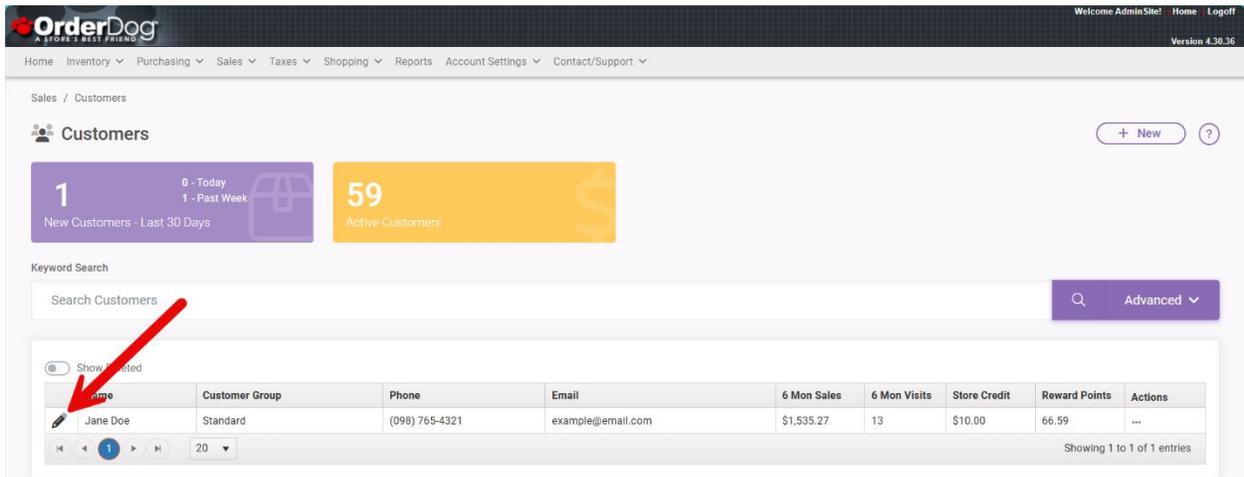
1. Starting on the portal, hover over "Sales" and click on "Customers" from the drop-down menu.



2. Search for the customer you wish to adjust the rewards points for by typing in their first and/or last name, their phone number, or email address into the search bar. You can also use the advanced settings if needed. Click the search button.



3. Click on the pencil icon next to the customer's name to edit their customer record.



4. On the right-hand side of the screen, click on the icon that looks like a series of sliders to make a reward points adjustment.

The screenshot shows the 'Customer - Edit' page in the OrderDog system. The left sidebar contains customer information fields: Status (Active), First name (Jane), Last name (Doe), Email address (example@email.com), Mobile ((098) 765-4321), and Phone. The right sidebar contains a summary of customer activity: Sales (43), Sales Amount (\$3,616.70), Returns (14), and Joined date (January 15, 2024). Below this is the 'Reward Points' section, which shows a current balance of 66.59 and a 'View History' link. A red arrow points to the 'Reward Points' section.

5. Under “**Add Adjustment**” type in the amount you would like to adjust the balance by. To add to the balance, type a positive number. To subtract, include a subtraction sign just before the number. As you fill in the amount, you’ll be able to see what the new balance will be below the amount field.

The screenshot shows the 'Reward Adjustments' page in the OrderDog system. The left sidebar contains customer information: Customer Info (Jane Doe (1234629)). The right sidebar contains a 'Summary of Results' section showing 7 Adjustments and 66.59 Available Points. Below this is the 'Add Adjustment' section, which is highlighted with a red box. It contains an 'Amount' field with the value 60.97 and a 'Notes' field. Below the 'Amount' field, the 'New balance: 127.56' is displayed. An 'Add' button is located to the right of the 'Notes' field.

- Next, type in the notes the reason for the adjustment. If a customer was not associated with a transaction when they should have been, we recommend including the receipt number for the receipt they should have been included on for record keeping.

Reports / Reward Adjustm...

Reward Adjustments

Customer Info: Jane Doe (1234629)

Summary of Results: 7 Adjustments, 66.59 Available Points

Add Adjustment

Amount: 60.97
New balance: 127.56

Notes: Forgot to add customer to transaction R1-2-15

Add

Results

- Click "Add" when you're done filling out the above information.

Add Adjustment

Amount: 60.97
New balance: 127.56

Notes: Forgot to add customer to transaction R1-2-15

Add

- Your adjustment has been added to the customer's reward points. Make sure to perform a manual sync on your point of sale(s) to see this change reflected immediately.

Reward Adjustments

Customer Info: Jane Doe (1234629)

Summary of Results: 8 Adjustments, 127.56 Available Points

Add Adjustment

Amount: 0.00

Notes: Notes

Add

Results

Date	Type	Points	Description	Employee
12/6/2024	Adjustment	60.97	Forgot to add customer to transaction R1-2-15	
12/6/2024	Adjustment	-60.99	Test	
12/6/2024	Adjustment	60.00	Test	

Success: Reward adjustment saved

YOU'RE DONE!

If you have any questions or concerns regarding this tutorial, or any other inquiries, please feel free to contact us at:

Email: support@orderdog.com

Call: 1-866-673-3736

Our hours: 8 AM – 6 PM CST

Monday – Friday

After Hours Support Available

Visit our website for more tutorials and resources:

<https://orderdog-inc.kayako.com/>

