Review the Customer Loyalty Points Ledger

How to Review the Customer Loyalty Points Ledger in Muhasib ERP

Overview

This guide will help you explain a customer's loyalty-point balance from opening through earned, redeemed, expired, and adjusted points.

You get a complete points roll-forward.

Who can do this

You need access to Loyalty Points Ledger and customer scope.

Before you start

Know customer, exact date range, expected opening/current balance, and loyalty rules.

> Before saving, check that the correct company is open and that you have permission to complete this task.

Where to find it

Back Office → Sales & Customers → Customer Loyalty Points Ledger.

Review the Customer Loyalty Points Ledger

Step 1: Select company, customer, and date range

Step 2: Confirm opening points

Step 3: Review each earn, redeem, expiry, adjustment, and reversal

Step 4: Recalculate running balance

Step 5: Drill to source transactions

Step 6: Compare closing points with customer/current summary

Check your work

Opening plus valid additions minus reductions equals closing and agrees with the points report.

> Take a moment to check your work before closing the window. This small check can save time later.

If something goes wrong

- Check transactions before the selected range for opening differences.
- Confirm returned sales reverse points according to the set up rule.

Related guides

- Review Customer Loyalty Points Inquiry
- Review the Customer Loyalty Points Report

- Review Sale Return Inquiry

What to do next

> **Review Customer Loyalty Points Inquiry**.

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