Review the Customer Loyalty Points Report

How to Review the Customer Loyalty Points Report in Muhasib ERP

Overview

This guide will help you summarize loyalty points by customer and identify balances requiring action.

You get a customer-level loyalty liability/activity summary.

Who can do this

You need access to Loyalty Points Report and authorized customer scope.

Before you start

Define company, as-of date, customer/group scope, active/expired inclusion, and expected control total.

> 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 Report.

Review the Customer Loyalty Points Report

Step 1: Set company and as-of/date filters

Step 2: Select customer/group and status scope

Step 3: Generate the report

Step 4: Review earned, redeemed, expired, and available totals shown

Step 5: Drill to loyalty ledgers for exceptions

Step 6: Export only with customer-data authorization

Check your work

Sample customer totals compare and confirm to their loyalty ledgers and inquiry transactions.

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

If something goes wrong

- Confirm as-of and expiry processing time.
- Do not sum overlapping earned and available columns.

Related guides

- Review the Customer Loyalty Points Ledger
- Review Customer Loyalty Points Inquiry
- Create a Customer

What to do next

> **Review the Customer Loyalty Points Ledger**.

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