

Adding points one customer at a time is slow when you have a whole list to bring in. The Upload Transactions tool adds points to many customers at once from a single spreadsheet.

Video walkthrough



Watch the video: <https://www.youtube.com/watch?v=eGAK5OeLRvc>

Steps

1. Go to Admin Panel, then Loyalty Program, then Point History.
2. Click the three dot menu at the top right and choose Upload Transactions.
3. Click Download example CSV file, then open it in your spreadsheet app.
4. Keep the first row as it is, and fill your data from row two down, one customer per row.
5. Put the points in the Amount column and the phone number in the Customer column.
6. Save the file, drag it into the upload box, match the columns, then click Import.

Your file should look like this, tall and thin, with one customer on each row:

How your CSV should look

bulk-points.csv CSV				
	A	B	C	D
1	amount ● REQUIRED	customer ● REQUIRED	space_slug ● OPTIONAL	remarks ● OPTIONAL
2	150	+60123456789		Walk-in purchase
3	250	+60169616543		Online order
4	100	0142264638		
5	347	+601110202590		Birthday bonus

Row one is the column names. One customer per row after that.

Good to know

A red message about duplicate column headers means your data is sideways in one row, or the header row was deleted. Reshape it tall and thin, then re-upload.

► [Video transcript: Bulk Upload Points with a CSV](#)