

# How to View and Edit a Customer Profile

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## What Is This?

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Every customer who joins your loyalty program has a profile with their contact details, points balance, tier, tags, and activity history. You can view any customer's full profile and update their details whenever needed — keeping your records accurate and your communication on point.

## Real-Life Example

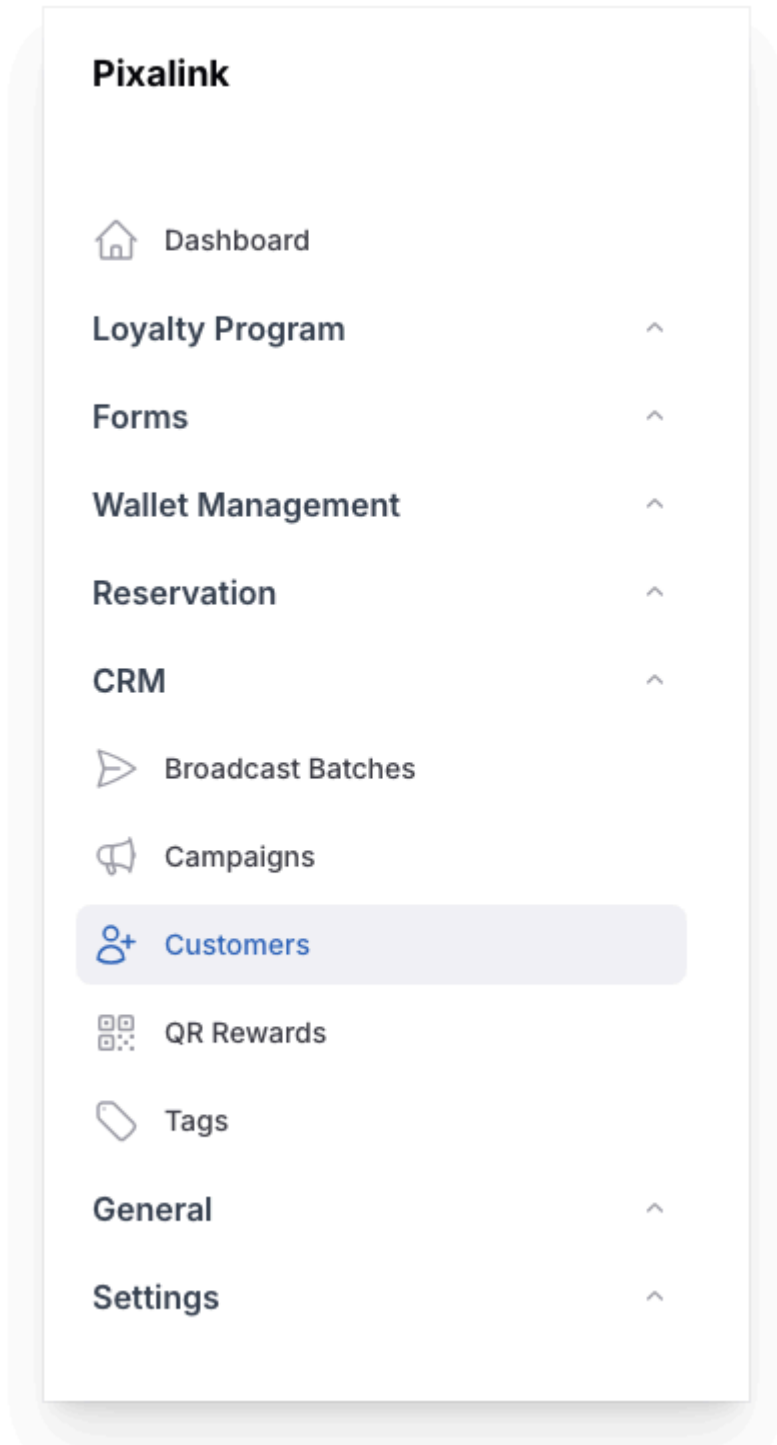
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Siti runs a boutique cafe in Petaling Jaya. One of her regulars, Ahmad, recently changed his phone number and asked to update it. Siti opened Ahmad's profile in the admin panel, clicked **Edit**, updated his phone number, and saved the changes — all in under a minute. Now Ahmad continues receiving WhatsApp updates about new promotions and his birthday reward. Keeping profiles up to date means your customers never miss out on rewards they've earned.

## How to View a Customer Profile

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1. Go to **Admin Panel** → **CRM** → **Customers**



2. Find the customer in the list using the search bar at the top. You can search by name or phone number.

Customers			
Name	Phone Number	Tags	
Ahmad bin Hassan	+60123456789	VIP	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Siti Nurhaliza	+60187654321	Regular	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Wei Lin Tan	+60112223344	New	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>
Priya Nair	+60145556677	Regular	<a href="#">View</a> <a href="#">Edit</a> <a href="#">Delete</a>

3. Click **View** next to the customer's name to open their full profile.

<b>Name</b> Ahmad bin Hassan	<b>Properties</b> <b>Source</b> Direct <b>Status</b> Open
<b>Email</b> ahmad.hassan@email.com	<b>Tier</b> <b>Tier</b> Gold <input type="checkbox"/> <b>Fixed Tier</b> When checked, the customer will always stay on this tier
<b>Phone Number</b>	<b>Tags</b> New tag
<b>Gender</b> Male	<b>Current Point</b> 1,250
<b>Date of Birth</b> 15/03/1990	<b>Credit Balance</b> 350.00
<b>Space</b> Main Outlet	<b>Invited By</b> N/A
<b>Notes</b>	<b>Joined at</b> 03/15/2025, 10:30:00 AM Joined at 1 year ago

## How to Edit a Customer Profile

4. Click **Edit** in the top-right corner, then update the fields you need — for example, **Name**, **Email**, **Phone Number**, **Gender**, or **Date of Birth**. Click **Save** when you're done.



## Good to Know

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- You can record points or redeem a reward directly from the profile page using the **Record Point** and **Quick Redeem** buttons at the top
- The **Status** field tracks where the customer is in your sales pipeline — options include Lead, Open, Replied, Opportunity, Quotation, Lost Quotation, Interested, Converted, Do Not Contact, and Blocked
- If you assign a tier manually and tick **Fixed Tier**, the customer stays on that tier even if their points change
- Tags help you group customers for targeted campaigns — you can add or remove them right from the profile
- The **Joined at** field shows exactly when this customer first signed up

## What's Next?

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- [How to Record Points for a Customer](#)
- [How to Create and Use Tags](#)
- [How to Block a Customer](#)