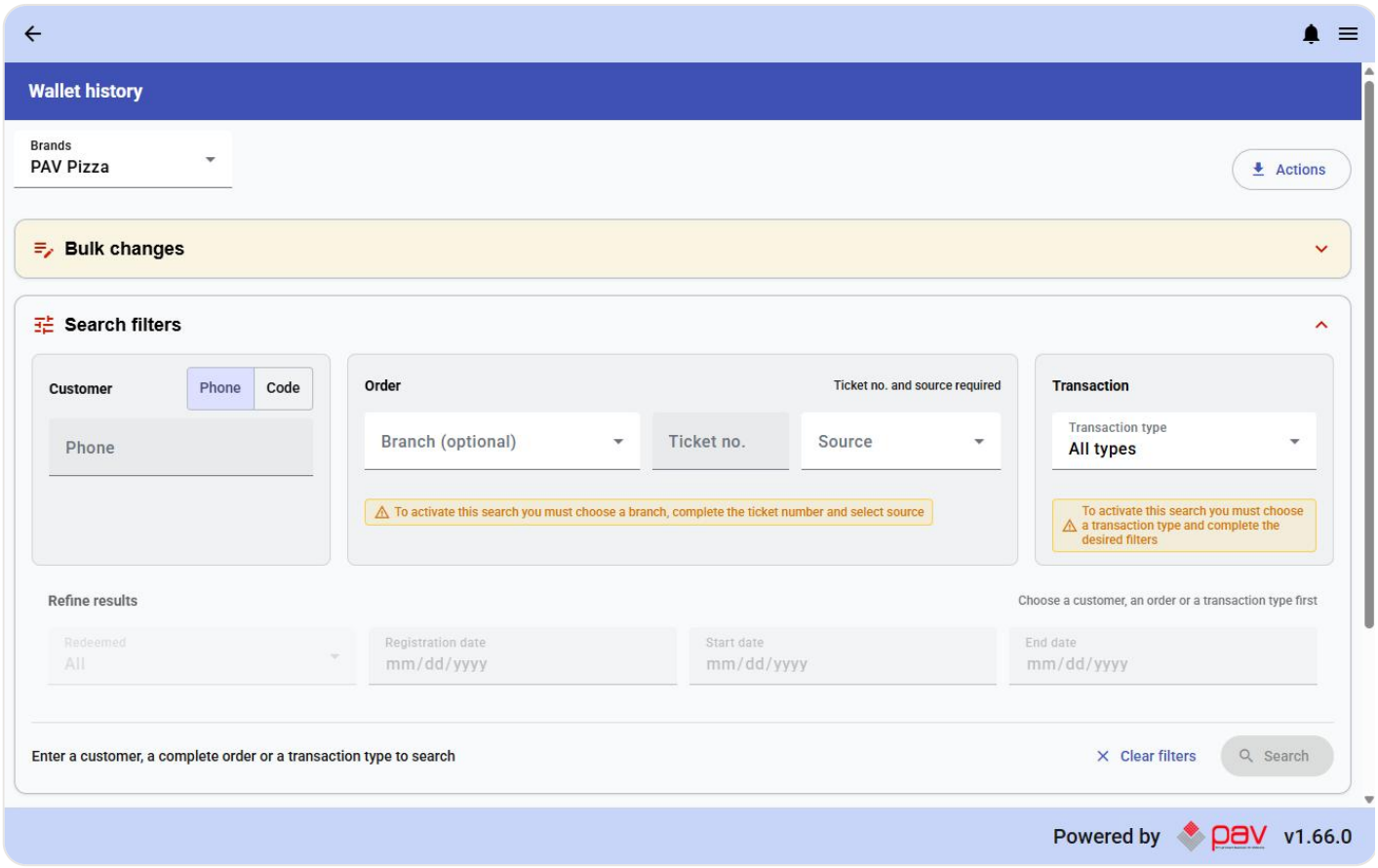
Wallet history: finding a customer

> **You need:** *Wallet manager — view*.

Most wallet work starts with a customer on the phone. This page is how you get from what they can tell you to what you need on screen.



Start from the phone number

Customers know their phone number. They rarely know their customer ID.

The **lookup by phone** resolves a phone number to the customer, which is the identifier the rest of the wallet screens use. Start here.

> If the lookup finds nobody, the usual cause is a format mismatch — country prefix, spaces — rather than the customer not existing. Try the variant the brand stores before concluding they have no account. The same trap catches CSV imports, see Importing from a CSV.

Check the balance

With the customer identified, the balance answers the first question: how much credit do they have right now.

The balance is the net result of their wallet records. When it doesn't match what the customer expects, the records explain why — some may have expired, some may already be spent.

Read the records

Wallet records are the individual movements making up the balance. Searching them, filtered to that customer, shows how the balance was arrived at.

This is where "I had €20 and now I have €5" gets answered: either the credit was spent, or a record reached its end date.

Open the order behind a record

Where a record is linked to an order, you can open that order's full detail.

This closes the loop on the most common dispute — "I was charged even though I had credit". The order detail shows what was actually applied.

A working order for a customer call

1. **Phone → customer.** Confirm you have the right person.
2. **Balance.** What do they have now?

3. **Records.** How did it get that way?
4. **Order detail**, where a record points at one. What was actually applied?

By step 4 you can usually explain the discrepancy without changing anything — which is the better outcome, since adding credit to close a conversation hides the underlying cause.

When the answer is that something is wrong

If the records genuinely show a mistake, fixing it is on Wallet history: managing records — creating a correcting record, adjusting one, or expiring it.

> “Prefer a **new correcting record** over editing history. It leaves the original visible alongside the correction, which is what anyone reviewing this later needs to see.

Related pages

- Wallet history: managing records — creating and adjusting credit
- How bulk changes work — before touching many records
- Vouchers — for a fixed-amount gesture instead of a balance

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