



Partner management

Customer management

Bulk actions

< Back

Edit CTA moved in the card for contextual relevance
-visual cue added
-copy updated to Edit profile
-once actioned pop-up shows and user can edit first name, last name, email address plus Account Number and Phone Number TBC

Issue new reward

Create referral

Tooltip info:
e.g Date & Timestamp are in BST, UTC+1 (UK)

any reward that's been configured for the campaign needs to be able to be sent from portal

visual cue added to Create Referral CTA

Unsubscribe from emails became a toggle so the user can Opt In/Opt Out (users are able to Opt out now but you can't Opt in back)
once actioned pop-up screen appears to confirm the option

a clickable email link that opens an email composer making it easier for CS to get in touch with users

Referrer information

Account number

Dashboard URL

Activity

First Name(s)

Last name

Email address

Phone number

Locale

Marketing Opt in/Opt out

Campaign(s)

Capping status

Share URL

Referrals Made

Tooltip info
informs the user of their referring activity in the last e.g 30 days

Tooltip info
Informs the user that they can search referees by customer name, email or Order ID

Referees(s) information

Full name

Email

Phone no

Sign up status

First Name(s)

Last Name

Purchase type

Campaign name

Locale

Registration Date

a clickable email link that opens an email composer making it easier for CS to get in touch with users

Search bar introduced

- voice command

Registration Date moved here

Referral Date removed as it already shows below in the Referral

Tooltip info:
(Q:should it show information about the date & time according to locale)

e.g Date & Timestamp are in (EST), UTC -5 (USA, Canada)

e.g Date & Timestamp are in BST, UTC+1 (UK)

user can resend email invitation by clicking CTA

e.g friend say they didn't receive the reward so Portal user can resend a Reward email

There are different actions depending on the state of the fulfilment:

Pending: Resend reward email, Change expiry, Expire fulfilment

Expired: Un-expire fulfilment
Complete: Resend reward email

NB expiry options only appear where a client has reward choices (click to claim) enabled and has expiry set on reward fulfilments.

e.g friend say they didn't receive the reward confirmation email

Portal user can resend a Reward confirmation email

Referral Date

Referral History Log

| | | |
|--|------------------|-----------------------------------|
| | 2023-01-15 09:20 | Referral Email Invitation Sent |
| | 2023-03-06 15:20 | Referral Email Invitation Viewed |
| | 2023-03-06 15:25 | Referral Email Invitation Clicked |

Reward Name & Type

Reward Value

Fulfilment Date

Reward status

Reward Fulfilment Log (DNA)

| | | |
|--|------------------|----------------------------------|
| | 2023-03-06 16:25 | Reward Order Created |
| | 2023-03-06 16:26 | Reward Order Processing |
| | 2023-03-06 16:30 | Reward Order Processed |
| | 2023-03-06 16:31 | Reward Sent |
| | 2023-03-06 16:35 | Reward Email Viewed |
| | 2023-03-06 16:40 | Reward Email Clicked |
| | YYYY-MM-DD HH:MM | Reward Claimed |
| | YYYY-MM-DD HH:MM | Reward Confirmation Email Viewed |

Reward Info

Reward Category
Reward Expiry Date
Reward Expiry Type

Reward

Transaction Status
Transaction ID
Time Processed
Errors

Each reward type (Hyperwallet, Paypal, RCF Voucher, Kuna) will have a personalised card/tile.

Full name

Email

Phone no

Sign up status

Full name

Email

Phone no

Sign up status