

Transaction Lookup

There are times you'll need to recall a transaction or reprint a related document.

In this course, we show how to find transactions created in point-of-sale, how to open the related documents, and how to reprint invoices or receipts.

Topics

- Quick Recall Viewer
- Order Detail Viewer
- Daily Journal Viewer

Quick Recall Viewer

We begin with the QuickRecall Viewer.

There are a few ways to find it.

From the system browser, open the Sales Review Menu and select QuickRecall.

You can also type QR in the launch bar.

If in Point of Sale or Customer Maintenance, select QuickRecall from the ribbon menu.

Once in QuickRecall, use the header fields to limit the grid display.

To find a specific customer, enter their name, account number, phone number, or email address.

To search by document number, enter a period followed by the number.

To further limit the search, enter the Job number, SKU, or store number.

To view transactions based on a specified date range, select Change Lookup and choose Cust/Date Range.

Then press OK.

Use the Transaction Date and Thru Fields to set the date range.

To view a detailed record of the items purchased as well as their quantity, select Yes in the Details dropdown.

Select Refresh to apply any changes.

Remember, Quick Recall is a viewer. Add or remove columns as needed.

Right-click the column titles and choose Select Columns to View to make any changes.

Once you find the document, select the line and choose Display.

You can also double-click the selected line.

From the Document screen, select Image to view the receipt or invoice.

Select the print button to print another copy of the document.

To email the document, select Miscellaneous and choose Email Receipt to Customer.

Enter the customer's email and attach the document.

A best practice is to select P for PDF.

QuickRecall enables printing documents directly from Point of Sale.

From the Point-of-Sale window, select Quick Recall.

As before, use the options to locate the document.

Choose Select in the ribbon, confirm the options are correct, and choose OK to print the document.

Order Detail Viewer

The Order Detail Viewer gives line-item detail for open Point of Sale documents.

From the Point-of-Sale screen, select Menu and choose Documents.

Then, from the Miscellaneous menu, select View Order Details.

As with QuickRecall, use the options fields to locate the document.

Daily Journal Viewer

Use the Daily Journal Viewer to search for and display any transaction to which the system assigns a journal number.

This includes both POS and back office transactions such as sales, estimates, voids, paid outs, deposits, received on account, and more.

We included a document listing the transaction types available in the Daily Journal Viewer in the course materials section.

From the system browser, select Sales Review, then Daily Journal Viewer.

You can also type DJ in the launch bar and press Enter.

Fill in the header fields to limit the grid display.

For example, enter a Start Date, End Date, or a Document Number.

Further limit the results by selecting the tender type and transaction origin.

Select Refresh on the ribbon menu to view the results.

Double-click a document to view it's details.

For transactions completed in POS, you can also view the receipt.

As you can see, there are multiple ways to view transaction and document information in the system.

In this course, we showed how to find transactions created in point-of-sale, how to open their related documents, and how to reprint invoices or receipts.

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