Transaction Lookup

Epicor: Uh, Kayla, you look lost. What’s going on?

Kayla: Well, I processed a bunch of transactions, but now I don’t know where to find them in Eagle.

Epicor: No worries, that’s an quick fix! Looking up transactions in Eagle is easy. Choose one of the buttons and we’ll take a closer look at the different ways you can locate them.

Topics:

* Quick Recall
* Order Detail Viewer
* Daily Journal Viewer

Quick Recall

One of the best ways to review documents is through the Quick Recall Viewer. From the Eagle Browser, select Sales Review and then click Quick Recall Viewer. Or type QR in the Launch Bar and press Enter.

If you happen to be in Point of Sale or Customer Maintenance, you can select Quick Recall from the ribbon menu. Once in Quick Recall, use the header fields to limit what the grid displays. To locate a specific customer, enter their account number, phone number, or email address in the customer box.

Enter the Job number, SKU, or store number to further limit the search. To view transactions based on a specified date range, click the Change Lookup link and select Cust/Date Range. Then press OK.

Use the Transaction Date and Thru fields to set a date range. Select Yes in the Details Dropdown to view a detailed record of the items purchased as well as their quantity and price. Then press refresh to apply any changes. To search for a specific document number, enter a period, followed by the document number. You can use the available grid filters to find your document on the bottom half of the screen. Select the line and press Display or just double-click the line.

From the Document screen, select Image. Here you can view the receipt or invoice. Select the Print button to print a copy. To email the document, select Miscellaneous, and then press Email Receipt to Customer.

Enter an Email Message and update the customer’s email if it’s different from the one displayed. Now choose the right Email Format. Quick Recall also lets you print documents directly from Point of Sale. From the Point of Sale window, select Quick Recall. Just like before, use the options to locate your document.

Then, press select. Confirm the settings and press OK to print the receipt or invoice. Investigating past transactions or responding to customer requests for copies is easy when you use the power of the Quick Recall grids.

Order Detail Viewer

There are a few important types of documents you can access from Point of Sale. Start by clicking the Menu button and choose Documents.

This viewer allows you to look at Estimates, Layaways, Orders and a few other document types. You can also access Service Orders and the Change log by clicking on the related hyperlinks. Double-click a document to view it in greater detail. To view documents specific to orders, open the Miscellaneous menu and select View Detail Order. Use the various filters to narrow your search. Double click a line to view the document details.

Daily Journal Viewer

The Daily Journal Viewer lets you look up multiple transactions in one location. From the Eagle Browser, select Sales Review, and then Daily Journal Viewer. You can also type DJ in the launch bar and press Enter.

Use the header fields to limit what displays in the grid. For example, you can enter a Start Date, End Date, or a specific Clerk. You can further limit results by selecting the Tender, which refers to whether they paid by Credit Card, Cash, or by some other method.

You can also use Origin to identify transactions done from the back office or Point of Sale. Press refresh on the ribbon menu to view your selections. Double click any document in the list to view the transaction‘s details. With completed POS transactions, you will also be able to view the receipt. Now you can easily review the transactions of a specific cashier, isolate balancing issues, or see a weeks’ worth of transactions in one place.

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