Searching for Transactions

Lighthouse Transaction Manager (LTM) provides quick search and advanced search options to locate a transaction for a refund, chargeback defense, or any other reason.

Performing a Quick Search

To perform a quick search, which is available on most pages, complete the following steps:

1. From the menu, select **Transactions > Select Merchant**.
2. On the Select Merchant page, select the merchant(s) for which you would like to search transactions and click **Submit**.
3. Enter a value in the Search field.

Note: Any of the following criteria may be searched in LTM: an invoice number (full number or last four numbers), a clerk number, a card number (full number, last four numbers, or first four numbers), a customer name (full or partial), or an amount. The search field is not case sensitive.
4. Press **Enter** on the keyboard, or click ![search_icon] and select **Quick Search** (which is the same as pressing Enter).
5. The results will be displayed and may be current or archived transactions.

Performing an Advanced Search

The Transaction Search page, which is an advanced search page with a variety of search options, can be accessed from most pages.

To perform an advanced search, complete the following steps:

1. From the menu, select **Transactions > Select Merchant**.
2. On the Select Merchant page, select the merchant(s) for which you would like to search transactions and click **Submit**.

**Note:** An “A” next to an invoice number indicates an archived transaction.
3. Click and select Advanced Search.

4. On the Transaction Search page, configure the Main Search Criteria and Additional Search Criteria area.

Tip: The Search Hints area provides instructions on syntax and how to use a variety of filters that narrow the search.

5. Click Search.
Advanced Search Tips

- Use the Fields to Search area to narrow the search by selecting the fields that correspond to the value entered in the Search field. The fields are: Invoice, Card number, Customer name, Clerk, Amount, or Notes.
  - For example, if you enter a customer name in the Search field, ensure Customer name is selected in the Fields to Search area.

  Note: If fields are not selected in the Fields to Search area, zero transactions will be returned when the search is submitted.

- Use the Transactions to Search area to narrow the search by selecting the fields that correspond to the value entered in the Search field. The fields are: Sales, Refunds, Auth only, Voids, Current transactions, or Archives.
  - For example, if the transaction that needs to be found is a current authorization, select Auth only and Current transactions, then clear Sales, Refunds, Voids, and Archives. This removes the unnecessary fields from the search and will return more relevant results when the search is submitted.

  Note: If fields are not selected in the Transactions to Search area, current and archived transactions will be returned when the search is submitted.

- Use the Additional Search Criteria area to further define the search.
  - For example, if the customer made several purchases but only one is being refunded, the transaction can be searched for by completing the following steps:
    - Under Main Search Criteria, in the Search field, enter the customer’s name.
    - Under Main Search Criteria, in the Fields to Search area, select Customer name.
    - Under Additional Search Criteria, in the Joining Method list, select Above criteria AND this criteria.
    - Under Additional Search Criteria, in the Search field, enter the specific dollar amount of the transaction.
    - Under Additional Search Criteria, in the Fields to Search area, select Amount.
    - Click Search.
Searching for IT’S YOUR CARD® (IYC) Transactions

IT’S YOUR CARD® (IYC) transactions can be searched for by using the same steps previously outlined in the Performing a Quick Search and Performing an Advanced Search sections.

In addition to the Auth, Sale, Refund, and Void transaction types displayed, the following may also be displayed in the search results:

- Loaded – Denotes the IYC gift card was loaded or reloaded. (The amount displayed is only the amount loaded in the displayed transaction and may not be the total or current amount on the card.)
- Inquiry – Denotes an inquiry was made on the IYC gift card, like a balance inquiry.
- Deactivated – Denotes the IYC gift card was deactivated.

Note: For additional information, see the Activating Gift Cards document located in Lighthouse Transaction Manager Help. The Using Lookup to Find a Gift Card section reviews how to locate an IYC gift card to view or change its status.