

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.

The screenshot displays the Lighthouse Transaction Manager interface. At the top, there's a navigation bar with the Shift4 Payments logo and 'Lighthouse Transaction Manager'. The user is logged in as 'hsmith (Acct #24)'. The main area is titled 'Current Transactions'. Below this, there are several tabs for 'Selected Merchants': 'dw Demo Adv Deposit', 'dw Demo Auto Rental', 'dw Demo e-Commerce', 'dw Demo Hotel', and 'dw Demo Restaurant'. A search bar is present on the right. The left sidebar contains a 'Select Business Date' button and a list of filters. The main content area shows a grid of filter categories with checkboxes. Below the filters is a table of transactions.

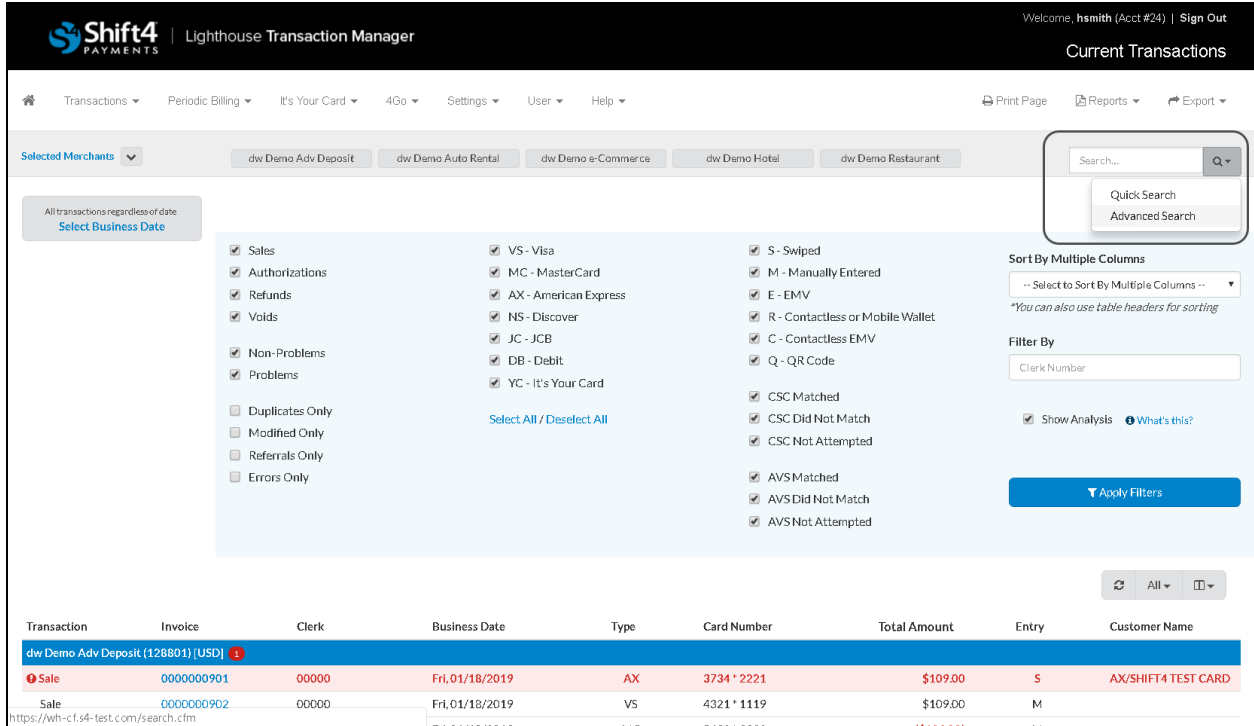
Transaction	Invoice	Clerk	Business Date	Type	Card Number	Total Amount	Entry	Customer Name
dw Demo Adv Deposit (128801) [USD]								
! Sale	000000901	00000	Fri, 01/18/2019	AX	3734 * 2221	\$109.00	S	AX/SHIFT4 TEST CARD
Sale	000000902	00000	Fri, 01/18/2019	V5	4321 * 1119	\$109.00	M	



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.



3. Click  and select **Advanced Search**.



The screenshot shows the 'Current Transactions' page in the Shift4 Payments Lighthouse Transaction Manager. The search filters section is expanded, showing various categories of filters:

- Transaction Status:** Sales, Authorizations, Refunds, Voids, Non-Problems, Problems, Duplicates Only, Modified Only, Referrals Only, Errors Only.
- Card Type:** VS - Visa, MC - MasterCard, AX - American Express, NS - Discover, JC - JCB, DB - Debit, YC - It's Your Card.
- Payment Method:** S - Swiped, M - Manually Entered, E - EMV, R - Contactless or Mobile Wallet, C - Contactless EMV, Q - QR Code.
- AVS Status:** CSC Matched, CSC Did Not Match, CSC Not Attempted, AVS Matched, AVS Did Not Match, AVS Not Attempted.

Additional options include 'Select Business Date', 'Sort By Multiple Columns', and 'Filter By' (Clerk Number). An 'Apply Filters' button is visible at the bottom right of the filter section.

Transaction	Invoice	Clerk	Business Date	Type	Card Number	Total Amount	Entry	Customer Name
dw Demo Adv Deposit (128801) [USD]								
Sale	000000901	00000	Fri, 01/18/2019	AX	3734 * 2221	\$109.00	S	AX/SHIFT4 TEST CARD
Sale	000000902	00000	Fri, 01/18/2019	VS	4321 * 1119	\$109.00	M	

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.

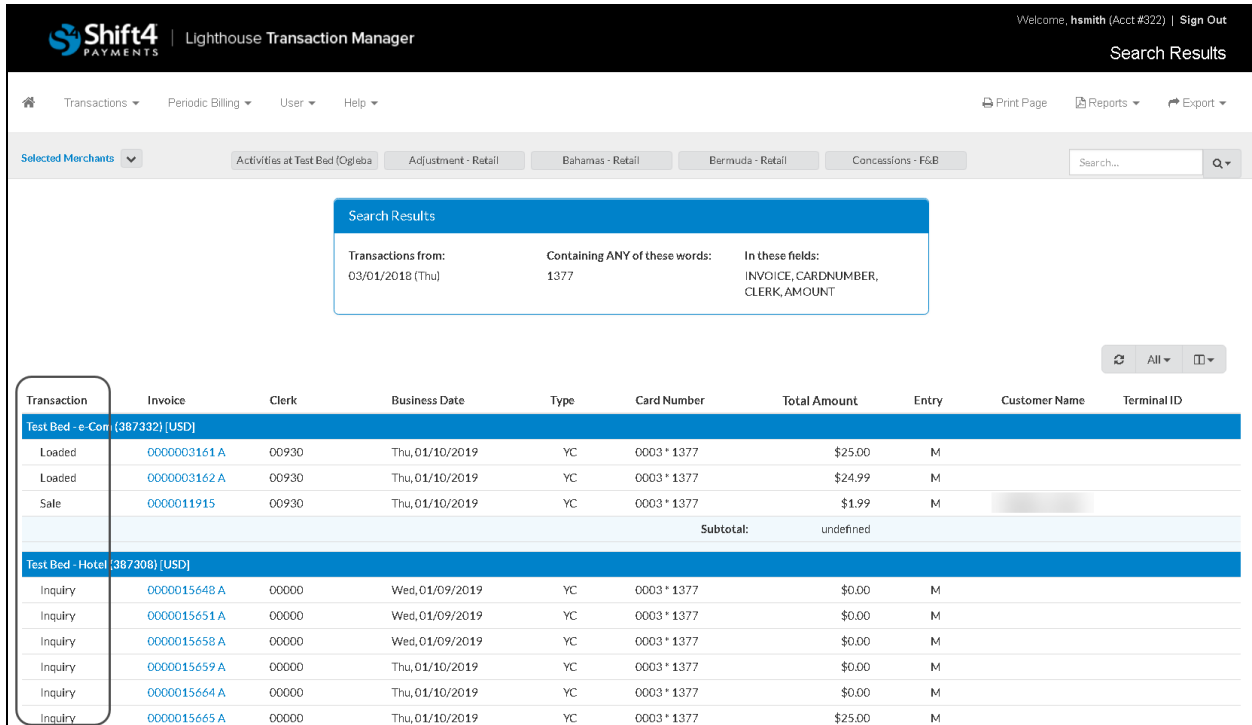
- Use the Additional Search Criteria area to further define the search.
 - For example, if the customer made several purchases but only one is being refunded, the transaction can be searched for by completing the following steps:
 - Under Main Search Criteria, in the Search field, enter the customer's 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.



The screenshot shows the Lighthouse Transaction Manager interface. At the top, it says "Shift4 PAYMENTS | Lighthouse Transaction Manager" and "Welcome, hsmith (Acct #322) | Sign Out". The search results are displayed for the merchant "Test Bed (Ogleba)". The search criteria are: Transactions from: 03/01/2018 (Thu), Containing ANY of these words: 1377, In these fields: INVOICE, CARDNUMBER, CLERK, AMOUNT. The results table is as follows:

Transaction	Invoice	Clerk	Business Date	Type	Card Number	Total Amount	Entry	Customer Name	Terminal ID
Test Bed - e-Com (387332) [USD]									
Loaded	000003161 A	00930	Thu, 01/10/2019	YC	0003 * 1377	\$25.00	M		
Loaded	000003162 A	00930	Thu, 01/10/2019	YC	0003 * 1377	\$24.99	M		
Sale	0000011915	00930	Thu, 01/10/2019	YC	0003 * 1377	\$1.99	M		
Subtotal:						undefined			
Test Bed - Hotel (387308) [USD]									
Inquiry	0000015648 A	00000	Wed, 01/09/2019	YC	0003 * 1377	\$0.00	M		
Inquiry	0000015651 A	00000	Wed, 01/09/2019	YC	0003 * 1377	\$0.00	M		
Inquiry	0000015658 A	00000	Wed, 01/09/2019	YC	0003 * 1377	\$0.00	M		
Inquiry	0000015659 A	00000	Thu, 01/10/2019	YC	0003 * 1377	\$0.00	M		
Inquiry	0000015664 A	00000	Thu, 01/10/2019	YC	0003 * 1377	\$0.00	M		
Inquiry	0000015665 A	00000	Thu, 01/10/2019	YC	0003 * 1377	\$25.00	M		



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.