

Transaction Review

Search customer receipts and explore transactions

Functionality

View and print individual receipts

Delve into individual receipts and access detailed information, including ordered items, payment methods, applied discounts or surcharges, and timestamps for each item or activity. By default, check details are stored for 730 days or approximately 2 years locally in your POS system.

Security camera integration

Using text-overlay compatible security cameras, effortlessly monitor transactions while viewing corresponding video clips in the Transaction Review. The text insertion interface relays the data from the transaction in MicroSale to the camera system.

Refine your search

Utilize the search criteria buttons to refine your search. Alternatively, use the Keyboard to further pinpoint specific details.

Search by:	
Check #	Item Sold (Menu Item or Modifier)
Table #	Time
Tab Name	Customer Phone Number
Employee	Customer Address
Payment Type	Custom Search
Voided Item	

How is the check # series determined?

You can see where the check/transaction was closed by the 4-digit check number. Each check number starts with the register number (e.g. Reg-1, POS1, etc).

Register 1 (POS1): Check #1xxx

Register 2 (POS2): Check #2xxx



Checks from all registers are consolidated and accessible in the Transaction Review on any register.

How to lookup receipts

Go to Managers Menu > **Transaction Review**

The screenshot shows a dark-themed search bar with the following fields: Selected Date (06/04/2023), Start Time (16:42), End Time (16:42), and Transaction Count (92). Two callout boxes provide additional information:

- The Selected Date used for the search**
 - Automatically defaults to today's date
 - To view every transaction from today, tap on **List All Transactions**
- Number of completed transactions (closed checks) for the Selected Date**

- The Transaction Review automatically defaults to today's date
 To view every transaction from today, tap on **List All Transactions**
- To search through checks from a different day, **tap on the desired date.**
 - Only dates within your current business week are listed, as this makes it much easier to navigate through your most current events.
- To search further back than the current week, tap on **Search History** and select a date range.
 - You can go back up to 2 years. *You can modify the duration of storage in your Misc. Function Register Settings.*
- After the date range is picked, select the **desired date** in the list.

Using the search criteria to filter results:

To Further narrow down your results, you can search within a **timeframe**:

- Tap on the **Start Time** and **End Time**
- Tap on **Time**

Menu Item, Employee Name, and Payment Type: refine your results by selecting additional options from the **Make a Selection** list located on the right side of the screen.

Check No, Table/Tab Name, Time, Phone Customer, Address, and Keyboard prompt a keypad to type in the specific information.

Voided Sales populate all checks with voided items or voided payments

- Tap on a check in the list to view the onscreen receipt

Show Items by Time is useful for full service or bar environments. Select the checkbox to view a timer (in minutes) next to each item on the check. This timer starts running at the initial start time of the check and can help provide insights into service speed and efficiency.

Viewing the onscreen receipt

1. The on-screen receipt header displays check ownership and the employee responsible for closing the check. *In bar or team environments, it's possible that checks or tabs are closed by a different employee.*
2. If the customer had a complaint or missed an item, you can attach a coupon or discount on the receipt that can be redeemed later (uses "Have one on me" coupon).
3. You can also print the receipt. The Reprint Original Check includes extra instructions that may have been attached to the original check such as the change due amount or special instructions used for a takeout order.
4. Review the ticket as needed. Toggle to the next check or exit.

PDF Reports: At-a-glance overview of check details

Using the toolbar, you can generate reports that provide an overview of individual check details.

Serving Time Summary

Displays an itemized list of employees summarizing each team member's **generated sales, average sales (per transaction) and average serving time (in minutes).**

Report Date 12/15/2022						
Date	Gross Sales	Discounts	Voids	Net Sales	Avg Sales	Avg Srv Time
Janet Wright	\$77.47	\$0.00	\$0.00	\$77.47	\$38.74	143.00
Sally Server	\$132.02	\$6.50	\$12.75	\$112.77	\$38.90	120.38
John Jones	\$124.99	\$6.50	\$12.75	\$105.74	\$38.90	120.38
Manager Manager	\$52.48	\$0.00	\$0.00	\$52.48	\$52.48	120.38

Sales by Individual Report

Allows you to examine information by employee, highlighting each team member's generated sales plus the **start time** of each check, **discounts** and **voids** applied, **payment methods utilized**, and **check totals**.

Report Date 12/15/2022									
Date	Time	Terminal	Check #	#	Gross Sales	Discounts	Voids	Check Total	Tender
Janet Wright >>									
12/13/2022	1:14 PM	POS1	9001	2	\$24.99	\$0.00	\$0.00	\$26.86	Cash
12/13/2022	1:16 PM	POS1	9002	4	\$52.48	\$0.00	\$0.00	\$56.42	Cash
				Totals	6	\$77.47	\$0.00	\$0.00	\$83.28
				Average Sale				\$41.64	
Sally Server >>									
12/13/2022	2:15 PM	POS1	1004	2	\$24.99	\$6.50	\$0.00	\$18.49	Cash
12/13/2022	2:39 PM	POS1	1005	5	\$54.55	\$0.00	\$12.75	\$41.80	Cash
12/13/2022	4:17 PM	POS1	1006	4	\$52.48	\$0.00	\$0.00	\$56.42	Cash
				Totals	11	\$132.02	\$6.50	\$12.75	\$116.71
				Average Sale				\$38.90	

Troubleshooting: Unable to view previous dates

To import the existing weekly sales backups, use the "Import Backups" button on the menu bar at the top of the screen. Once done, you can select any date range you wish to view transactions without having to select the weekly backup file first. This creates a much more user-friendly review area, especially when reviewing transactions beyond the current week. Data is stored in the MSaleDataSQL database.