

# New Page

The **Transaction List** tool allows you to generate a filtered list of transactions based on date, card type, and transaction type. It's useful for reconciling batches, finding specific payments, or reviewing all recent activity.

## Selecting a Date Range

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Use this section to define the transaction period you want to view. You can either:

- Manually enter a **Start** and **End** date
- Click one of the quick filters:
  - **Last 7 Days**
  - **Last 30 Days**
  - **Last Month**
  - **This Year**

## Filtering by Card Type

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Select one or more card types to include in your search results. The following options are available:

- **Visa**
- **MasterCard**
- **American Express**
- **Debit / Interac**
- **Other Cards** – includes card types outside of the major brands

## Filtering by Transaction Type

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Check the boxes for the types of transactions you'd like to see in your results:

- **Sales**
- **Returns**
- **Voids**
- **Declines**

You can further refine these results using the **Advanced Options** dropdown.

## Advanced Options

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This section lets you filter by more specific transaction types. You can select one or more of the following:

- **Purchase**
- **Sale**
- **Pre-Auth Completion**
- **Void Purchase**
- **Void Return**
- **Force Post**
- **Pre-Auth**
- **Pre-Auth Force**
- **Auth Only**
- **Settlements / Deposits**
- **Balance Requests**

These are particularly helpful when you're looking for a specific action in the transaction lifecycle (e.g., a Pre-Authorization that was never completed).

## Sort Options

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Choose how to sort your search results using the dropdown menu:

- **Newest transactions first**
- **Oldest transactions first**

## Additional Notes

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- The **Show Refunds** button at the top is a quick shortcut to filter the list by refund activity only.
- To narrow down transactions processed through specific payment tools like Payment Requests or PayMes, you can use the **Search** feature (return to the Main Menu). Simply enter the Reference Number with a % prefix to identify transactions from the following tools:
  - **%PR** – Payment Requests
  - **%PM** – PayMes
  - **%MTR** – Manual Transactions
  - **%ER** – Refund Requests

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Revision #4

Created 4 April 2025 14:33:27 by Caitlin Costain

Updated 6 May 2025 19:56:15 by Leorah Jacobson