

How to Change Your Default Transaction View in PaymentNet

The following instructions show how to change your default view on the Transactions / Query page in PaymentNet to show activity from the past 90 days.

1. Login to PaymentNet
2. Go to Transaction and Query
3. Set your search parameters to match one of the two images below.
 - a. This view will show all unapproved transactions from the past 90 days.

The screenshot displays the search configuration interface for transactions. At the top, there are 'Process' and 'Reset' buttons. Below them is a 'Required Fields' section with a 'Query' dropdown menu set to '(New Query)'. The 'Date Range' section contains one criterion: 'Post Date' is 'Is Relative' to 'Last Days' with a value of '90'. The 'Criteria' section contains one criterion: 'Approval Status' is 'Is Not Equal To' 'Approved'. The 'Hierarchy' section has an 'Include Children' checkbox and an 'Add' button. The 'Order By' section has a 'Field' dropdown and an 'Order Sequence' dropdown, with an 'Add' button.

Date Range			
Field	Operation	Value	
1	Post Date	Is Relative	Last Days 90 Add

Criteria			
Field	Operation	Value	
1	Approval Status	Is Not Equal To	Approved Delete Add

Hierarchy		
Field	Order Sequence	
		Include Children Add

Order By		
Field	Order Sequence	
		Add

b. This view will show all transactions from the past 90 days.

Process
Reset

* Required Fields

Query (New Query) ▼

Date Range

	Field	Operation	Value	
1	Post Date ▼	Is Relative ▼	Last Days ▼ 90	Add

Criteria

	Field	Operation	Value	
1	Original Amount ▼	Is Greater Than Or Equal To ▼	0.00	Delete Add
2	Or ▼	Original Amount ▼	Is Less Than Or Equal To ▼	0.00 Delete Add

Hierarchy

Include Children
 Add

Order By

	Field	Order Sequence	
			Add

4. After you've entered your search parameters, click the blue Process button that is in the upper left corner of the box.
5. When your search results are displayed, click Save Query and enter a name for the query.

Customize Columns
Save
View Statement

(New Query) ▼		Save Query 90 Days		Save	Cancel		
<input type="checkbox"/>		Post Date	Approval Status	Cardholder Last Name	Cardholder First Name	Accounting Code Values	
<input type="checkbox"/>		02/06/2017	New	AUSTIN	LYNELLE	KSUCOA2 ▼	100304 72017
<input type="checkbox"/>		02/06/2017	New	AUSTIN	LYNELLE	KSUCOA2 ▼	100304 72017
<input type="checkbox"/>		02/06/2017	New	AUSTIN	LYNELLE	KSUCOA2 ▼	100304 72017

6. Then click Set as Default Query.

Information was saved successfully

90 Days **Set as Default Query** Save Query | Delete Query [Customize Columns](#) Save

<input type="checkbox"/>				Post Date	Approval Status	Cardholder Last Name	Cardholder First Name	Accounting Code Values	
<input type="checkbox"/>				02/06/2017	New	AUSTIN	LYNELLE	KSUCOA2	100304 72017
<input type="checkbox"/>				02/06/2017	New	AUSTIN	LYNELLE	KSUCOA2	100304 72017

7. From this point forward, when you go to Transactions / Manage, you will see the results of the search parameters that you saved.