

## How to Perform a Query in PaymentNet

1. Login to PaymentNet
2. Go to Transaction and Query
3. Set your search parameters. Explanations of parameters:
  - a. Date Range
    - i. Field – Can be set to Transaction Date or Post Date. Use Post Date for most queries.
    - ii. Operation
      1. Cycle Is – Allows you to search within bank defined pcard cycles which appear in the Value section
      2. Is Between – Allows you to search a date range, which you enter in the Value section
      3. Is Equal To – Use when you know the exact post date you need to search
      4. Is Relative – Used to search time frames that are relative to the current date.
    - iii. Value – Date or range of dates to be searched
  - b. Criteria
    - i. Field – Transaction info that you want to search. A few common fields you might choose:
      1. Accounting Code Values
      2. Approval Status
      3. Merchant Name
      4. Original Amount
    - ii. Operation
    - iii. Value – Enter appropriate search term
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, you can click on Save Query, which will allow you to enter a name for your query. Your query will then be saved in the dropdown section on the Transactions screen.
6. If you want to edit your query, click the blue Advanced Query button that is on the right side. It will take you back to the parameter page, where you can change your parameters. After you change your parameters and hit Process, you can re-save your query if you would like to do so.

# Sample Queries

1. Search for a partial merchant name within a specific cycle

The screenshot displays the PaymentNet Advanced Query interface. At the top, there are navigation buttons for 'Process' and 'Reset'. Below this, a 'Query' dropdown menu is set to 'GBEX'. The 'Date Range' section contains a table with the following data:

	Field	Operation	Value	
1	Post Date	Cycle Is	Pcard cycle 01/03/17 02/01/17 Jan - 2017	Add

The 'Criteria' section contains a table with the following data:

	Field	Operation	Value	
1	Merchant Name	Contains	gbex	Delete Add

The 'Hierarchy' section has an 'Include Children' checkbox and an 'Add' button. The 'Order By' section has a table with the following data:

	Field	Order Sequence	
			Add

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2. Search for a transaction that was for a specific dollar amount using a range of dates.

The screenshot shows the PaymentNet Advanced Query interface in a web browser. The browser address bar shows the URL <https://www.paymentnet.jpmorgan.com>. The page title is "Transactions - Advanced Query".

At the top of the query form, there are "Process" and "Reset" buttons. Below them is a "Query" dropdown menu set to "GBEX".

The "Date Range" section contains a table with the following data:

	Field	Operation	Value	
1	Post Date	Is Between	01/01/2017 and 01/31/2017	Add

The "Criteria" section contains a table with the following data:

	Field	Operation	Value	
1	Original Amount	Is Equal To	10.71	Delete Add

The "Hierarchy" section contains a table with the following data:

		Include Children	
			Add

The "Order By" section contains a table with the following data:

	Field	Order Sequence	
			Add

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3. Search for all transactions that were allocated to a specific index during the last year.

The screenshot displays the 'Transactions - Advanced Query' interface in a web browser. The browser's address bar shows the URL <https://www.paymentnet.jpmorgan.com>. The interface includes a navigation bar with 'Process' and 'Reset' buttons, and a 'Query' dropdown menu set to '(New Query)'. The search criteria are defined in three sections:

- Date Range:** A table with columns 'Field', 'Operation', and 'Value'. The entry is: Field: Post Date, Operation: Is Relative, Value: Last Year. An 'Add' button is present.
- Criteria:** A table with columns 'Field', 'Operation', and 'Value'. The entry is: Field: Accounting Code Values, Operation: Is Equal To, Value: Chart Name: KSUCOA2, Segment Name: Index, Segment Value: 100304. 'Delete' and 'Add' buttons are present.
- Hierarchy:** A section with an 'Include Children' checkbox and an 'Add' button.
- Order By:** A table with columns 'Field' and 'Order Sequence', with an 'Add' button.

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