Custom Default Query

1. Login to PaymentNet and hover over Transaction, choosing <u>Query.</u>

Date Range

ID	Operator	Field	Operation	Value		Action
1		Post Date ▾	Is Relative ▾	Last Days ▾	30	Add

Criteria

ID	Operator	Field	Operation	Value	Action	
1		Cardholder Last Name ▾	Begins With ▾	a	Delete	Add
2	Or ▾	Cardholder Last Name ▾	Begins With ▾	b	Delete	Add
3	Or ▾	Cardholder Last Name ▾	Begins With ▾	c	Delete	Add

Hierarchy

ID	Hierarchy Name	Include Children	Action
Nothing Selected.			Add

2. In the criteria field, choose cardholder last name and type the last name under the value section.

3. Then click Add and continue this process for the rest of your cardholders. <u>Make sure to change the Operator to "or" if you are adding multiple people to your query. Also, make sure your Operation is equal to the value that you typed.</u>

Order By

ID	Field	Order Seque...
Nothing Selected.		

Process   Reset

4. Once you have added all of your cardholders to the list, click Process.

Transaction List

5. Click Save Query

Filter By (New Query) ▾   Save Query

6. Enter your query name and click save.

▾ Save Query   Please enter query name...   Save   Cancel

Post Date ⇕   Transaction Date ⇕   Reconciled   Transaction ID ⇕   Trans

✓ Set as Default Query   Save Query   Delete Query

Post Date ⇕   Transaction Date ⇕   Reconciled   Transacti

7. Last step is to set this as your default Query.