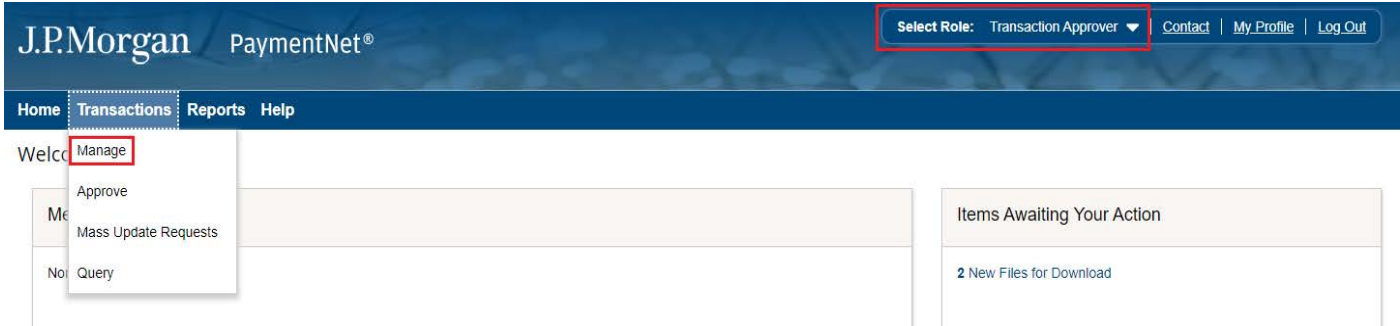


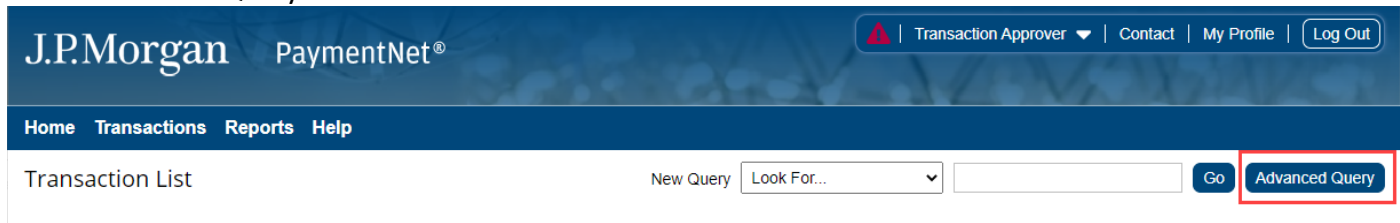
## How to Setup an Advanced Query

Set up an advanced query to ensure all transactions requiring your approval display in the transaction list. Follow these steps:

1. If you have more than one role in PaymentNet select Transaction Approver, then select Transactions > Manage.



2. Click "Advanced Query"



3. Change the Post Date range by selecting "Is Between" in the Operation drop down menu and add the date range in the Value fields. In the Criteria section select "Approval Status" for the Field and "Is Not Equal To" for the Operation, with "Approved" as the Value.

The screenshot shows the J.P. Morgan PaymentNet interface. At the top, there is a header with the J.P. Morgan logo and 'PaymentNet®'. To the right of the header, there is a 'Select Role:' dropdown menu set to 'Transaction Approver', and links for 'Contact', 'My Profile', and 'Log Out'. Below the header is a navigation bar with 'Home', 'Transactions', 'Reports', and 'Help'. The 'Transactions' menu is open, showing options: 'Manage', 'Approve', 'Mass Update Requests', and 'New Query'. The 'Advanced Query' button is highlighted with a red box.

Transactions - Advanced Query [Return to Transaction List](#)

[Process](#) [Reset](#)

\* Required Fields

Query (New Query) ▼

Date Range

ID	Operator	Field	Operation	Value	Action
1		Post Date ▼	Is Between ▼	03/01/2022 and 01/07/2024 (MM/DD/YYYY) (MM/DD/YYYY)	<a href="#">Add</a>

Criteria

ID	Operator	Field	Operation	Value	Action
1		Approval Status ▼	Is Not Equal To ▼	Approved ▼	<a href="#">Delete</a> <a href="#">Add</a>

Hierarchy

ID	Hierarchy Name	Include Children	Action
	Nothing Selected.		<a href="#">Add</a>

Order By

ID	Field	Order Sequence	Action
	Nothing Selected.		<a href="#">Add</a>

[Process](#) [Reset](#)

3. Click "Save Query"

J.P.Morgan PaymentNet®

Transaction Approver | Contact | My Profile | Log Out

Home Transactions Reports Help

Transaction List

New Query Look For... Go Advanced Query

Save View Statement

Filter By (New Query) Save Query Customize Columns

4. Name query and save

J.P.Morgan PaymentNet®

Select Role: Transaction Approver | Contact | My Profile | Log Out

Home Transactions Reports Help

Transaction List

New Query Look For... Go Advanced Query

Save View Statement

Filter By (New Query) Save Query Compliance Report Save Cancel Customize Columns

5. To use this query, select Transactions > Manage from the home page and your report name from the "Filter By" selection drop down menu.

J.P.Morgan PaymentNet®

Home Transactions Reports Help

Transaction List

Information was saved successfully

Filter By Compliance Report Set as Default Query Save Query Delete Query

60 DAY QUERY

75 day not approved

75 day query abby

75 day training

Approval all 75 day

Carol Murphrey

Compliance Report

Last 30 Days - System (All Accounts)

my query

New Transactions - Last 60 Days (All Accounts)

Out of Pocket/Mileage - Last 7 Days

Rejected Transactions - Last 60 Days (All Accounts)

Stalled Transactions - Last 60 Days (All Accounts)

test 123

TRAINING QUERY

Transaction Flags - Last 30 Days (All Accounts)

Transaction Flags - Last 7 Days (All Accounts)

Transaction Flags - Most Recent (All Accounts)

Waiting For My Approval - Last 60 Days (All Accounts)

Approval Status Post Date Cardholder Last Name

Mass Upload FAX Receipts Export All

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