How to use the Transactions – Advanced Query feature

From the Welcome screen, select the Transactions tab. From Transactions drop down, select Manage. (Example 1)

Example 1

The screen below will display (Example 2). The default Transaction List setting is to Filter By “Last 30 Days.”

If there are transactions being displayed, they are only within the Filter By criteria selected by the user. The Approval Status of a transaction has no impact on whether it will be displayed or not displayed. Meaning, New, Reviewed, Stalled, and Approved transactions outside of the Filter By criteria will not appear even if a not completely reallocated/reconciled.

To list all transactions more than 30 days ago, perform an Advanced Query. Select Advanced Query.

Example 2

Continue to page 2.
Transactions – Advanced Query screen (Example 3)

Under “Date Range” at “Operation” select operation from drop down menu.

The Operations are:

- Is Between – automatically displays 2 date fields to enter your specific dates you wish to display.
- Cycle Is – we do not use this operation.
- Is Relative – 9 selections, most used value is “Year To Date.” The Operation selection will dictate which Value is offered.
- Is Equal To – to enter one specific date

Highlighted areas direct you to which fields to edit for your specific Advanced Query.

You will see if you change the Operation, the Value selection also changes accordingly.

Select your criteria needed. Do not select Action Add. Doing this will put another blank line below the one just entered.

An error message will appear once Process is selected asking for a Value on the second line. Use the Action of Delete to remove that line.

Under “Criteria”, you may wish to type in a single cardholder last name to see just their transactions or to see All transactions from all cardholders within your department, under ACTION, select Delete. Doing this will skip this Field.

Select Process

Return to Transaction List.
Below we selected Operation “Is Relative,” and Value to “Year to Date.” (Example 4)
We DELETED the criteria line.
Selected Process.
This should return you to the Transaction List page, if not, select “Return to Transaction List” underlined in red below.

Example 4

By selecting Process, Paymentnet alerts you to the following pop up. Select OK. (Example 5)

Example 5

You will be returned to page 1 of the Transaction List. Because all transactions year-to-date was selected, all transactions from the beginning of the calendar year forward will display. Due to confidentiality of the live system, we are unable to display an example of the transaction screen.

Questions to be directed to:  pcardquestions@bcps.org