Creating a Query

On the Transaction List Screen, click on the **Create Query** button. This will bring you to the Query Wizard for Transaction List Screen. A list of criteria will appear which will allow you to refine the data to specific information. Here you will:

Select your choice of All or Any from the drop-down box

All – meets all criteria specified within the query

Any – meets any of the criteria specified within the query (only has to meet one of the criteria to appear in the query)

Select the field to query in the first drop-down box

Select the variable of the query in the second drop-down box

Fill in the last box with the appropriate value

To add additional rows of criteria, click the plus sign (+)**, then click Process Query**

To delete rows of criteria, click the x button

Query results will display on the Transaction Screen List Screen.

Beneath the criteria screen is Order by the following fields, an option that allows you to sort the data in the order you want

Reset Query allows you to revert to your previous query, and then continue the previous steps to create another query.

Save Query – If you need to run a query on a regular basis that you have created then you would click save query and type in a name for that query. The saved query will then appear in the **Select A View** drop-down box and since queries are specific to your user ID it would only be available for you.

Delete Query –To delete a query, first select it from the Select A View drop-down box and click **go.** Once the information has populated on the Transaction List Screen, click the Delete Query button.

Creating Reports

From PaymentNet's main navigation bar, scroll down to the **All Reporting** option and press **Go**. This will bring you to the Reports Screen.

Select Report Type – Here you will select a category of a report you would like to create. Click inside the circle next to the desired category to display the available reports and their detailed descriptions. Click on the report title.

After you select a report type, the system will take you to the next screen where you can input criteria in the same manner as in creating queries, that will help limit the results of the report. However, you can click on Bypass Criteria and run a report without any restrictions.

Generate the Report

Select the format you want the report generated in: Adobe PDF, Microsoft Excel, or Microsoft Word by clicking on the arrow next to the format type. If you want to regularly run this report, you can click Save Report Criteria at this point and enter a file name for this query.

PaymentNet will automatically load the Available Download Files Screen. As soon as your report is ready, it will appear on this page. Most reports are available immediately so you may click Refresh until your report appears or you may continue using PaymentNet and check back later. You may select the Notify me by email when the file becomes available box.

When the file name appears, you can right click on the report to save it to your desktop, or double click on the report to view it in the format you selected.

Reports you may use often and especially if they are a large report you may want to add it directly on the Schedule Auto Reports Screen. These reports are scheduled for generation during off hours and can be accessed at a later time.

Print Report

To print the report from the screen view, click on the print icon. To print a file saved to your computer, follow the print instructions applicable to the format you selected.