Querying Transactions – New Query

There are two (2) ways to query in Transactions Manage. These instructions are for the New Query option.

NEW QUERY

Click on the Drop Down Arrow. Choose the data point you want to query on.

Data Points:
Account Number – cardholders account
Approved Status – New or Approved
Cardholder Last Name
Diverted to – we don’t use
Merchant Name – how it shows up on the transaction
Parent Merchant Name – we don’t use
Post Date – when posted at the bank
Transaction ID – unique transaction ID (see instructions for looking up Transactions ID)

In the blank field box Type the first few characters of the search criteria. Click on the Go button OR Press Enter on your keyboard.

NOTES:
- The entire word/name/number is not needed.
- Wild card is %. It does NOT work for Post Date or Transaction ID.

The screen changes to bring up the answer to your query.
The answer is limited to the last 30 days except for Post Date and Transaction ID queries.