


## Cardholder/Manager Guide

### Log On

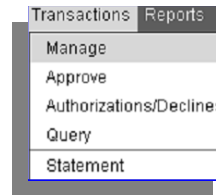
- 1) Open your Internet Browser.
- 2) Enter the following in your address bar:  
<https://www6.paymentnet.com>
- 3) Enter the following on the PaymentNet Login Screen:  
**Organization ID:** "yeshiva"
- 4) **User ID:** your ID  
**Pass Phrase:** your password
- 5) Click **Go**.
- 6) You will be required to change your pass phrase the first time you log on.
- 7) Enter your new pass phrase.
- 8) Confirm your new pass phrase.
- 9) Click **Save**.

### Change Your Pass Phrase


- 1) From the menu bar on the home page, select **My Profile** .
- 2) Click on the Change Pass Phrase hyperlink.
- 3) Enter the Old Pass Phrase.
- 4) Enter and confirm the New Pass Phrase.
- 5) Click **Save**.

### View Transactions

- 1) From the main menu, choose **Transactions**, then select **Manage**.



- 2) This will take you to the **Transaction List**, displaying all of your transactions for the last 30 days.
- 3) To view transactions older than 30 days, run an **Advanced Query for Transactions** (see Side Two).

Extra detail on transactions may be available; if icons are displayed in the Trans ID column (such as )  
Click the icon to view the line item detail.

### Allocate Transactions

- 1) Click on a transaction to view the **Transaction Detail** page.
- 2) Compare the transaction details (e.g., amounts) with your receipts.
- 3) Review the defaulted accounting code allocations and make any necessary changes.
- 4) If needed, add information to the **Transaction Notes** field.

### Review Transactions

- 1) Click on a transaction to view the **Transaction Detail** page.
- 2) Compare the transaction details (e.g., amounts) with your receipts.
- 3) Review the accounting code allocations and make any necessary changes.
- 4) If needed, add information to the **Transaction Notes** field.
- 5) Check the **Reviewed** box.

Approval	Status	New
Reviewed	<input checked="" type="checkbox"/>	
Approval 1	<input type="checkbox"/>	

- 6) Click **Save**.

### Approve Transactions

- 1) Click on a transaction to view the **Transaction Detail** page.
- 2) Review the accounting code allocations and make any necessary changes.
- 3) Check the **Approved** box.

Approval	Status	New
Reviewed	<input checked="" type="checkbox"/>	
Approval 1	<input checked="" type="checkbox"/>	

- 4) Click **Save**.

**Add Lines /  
Split Transactions**

- 1) From the **Transaction Detail** page, click **Add Lines**.
- 2) Indicate in the pop-up box how many lines you would like to add and click **OK**. The total transaction amount will be divided evenly among each line.
- 3) Make any necessary changes, including description, percentage/amount and code allocation for each line.
- 4) Click **Save**.

**Dispute Transactions**

**Before you dispute a transaction, you must first attempt to resolve the issue directly with the merchant!**

- 1) From the Transaction List, click on the transaction you need to dispute.
- 2) Click **Dispute**.
- 3) Select a Dispute Reason.
- 4) Confirm your **E-mail Address** and enter the **Merchant State**, if requested.
- 5) Enter any additional information required and click **Submit**.


**Track the status of your dispute online on the Transaction List:**

**■ = Dispute Submitted   ■ = Dispute in Process  
■ = Dispute Resolved**

**Advanced Query for Transactions**

- 1) From the main menu, choose **Transactions**, then select **Query**.
- 2) On the **Advanced Query – Transactions** page, click on the **+** to the right of the Criteria row.
- 3) Select the **Field** to query.
- 4) Select the **Operation** for the query.
- 5) Enter the desired data in the **Value** field.
- 6) To add additional rows of criteria, click the **+** button. To delete a row of data, click the **trash** button.
- 7) Click **Process** to run the query on all transactions within your entire hierarchy. Query results will be displayed on the Transaction List.

**Save a Query**

- 1) Run a query as described above.
- 2) Click the **Save Query** button.  

- 3) Enter the name of the query.
- 4) Click **OK**. The screen will refresh and the new query name will be displayed in the drop-down list above the Transaction ID column.

**Cardholder Support**

The Cardholder Support Team is available 24 hours a day for assistance at:

**1-800-270-7760**

Possible inquiries include:

- ▶ Reporting Lost/Stolen Cards
- ▶ Balance Inquiry
- ▶ Disputes Assistance
- ▶ Fraud Inquiry
- ▶ Declined Cards

Note: Cardholder Support will not be able to assist with PaymentNet-specific questions.

**PaymentNet Support**

For Company specific program inquiries/information or for help with navigating within PaymentNet contact:

Program Administrator  
(718) 430-8880  
[akerson@yu.edu](mailto:akerson@yu.edu)