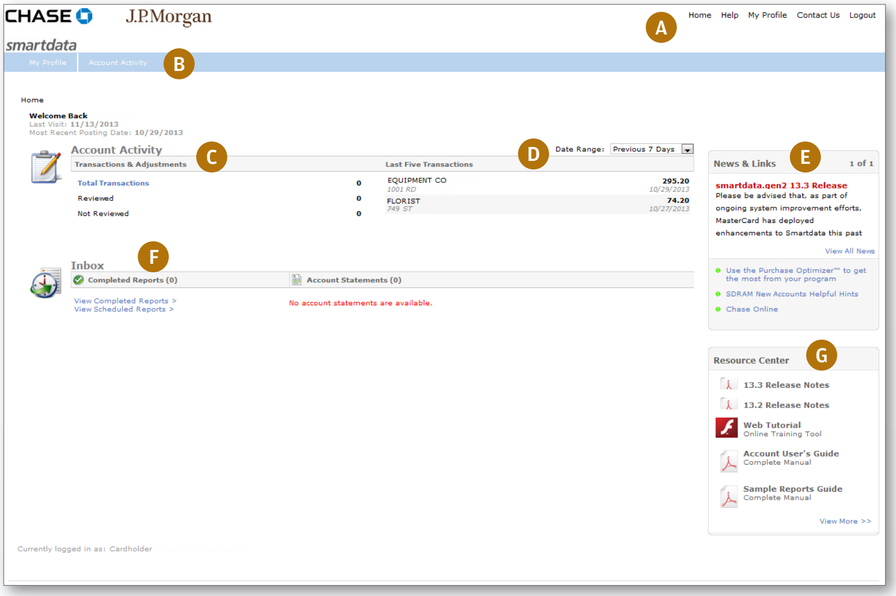
# *MasterCard Smartdata.gen2™ (Smartdata)*

## Cardholder Quick Reference Card

## Welcome to *Smartdata*

The Home screen displays each time you log on to *Smartdata*. It provides access to various data and information about your commerical card.

For additional information about these cardholder topics, refer to the *Account User's Guide* in the Resources Center section on the Home screen.




*A sample cardholder Smartdata home screen is shown above. Your display may vary.*

### A. Links for Common Operations

Provides quick access to basic application services, such as online help and the logout operation.

### B. Menus

Provides access to all screens and operations.

### C. Account Activity Summary

Contains important transactional information.

### D. Date Range

Specifies the transactions to include in the Account Activity summary sections.

### E. News and Links

Displays messages and resources posted by application administrators.

### F. Inbox

Provides access to reports, exports, and, where supported, results from operations (e.g., transaction processing).

### G. Resource Center

Provides application user guides, interactive tutorials, online help. Your program administrator might also post your company's policies and procedures.

Note: Your *Smartdata* session will automatically time out after 15 minutes of inactivity.

## Quick Topics





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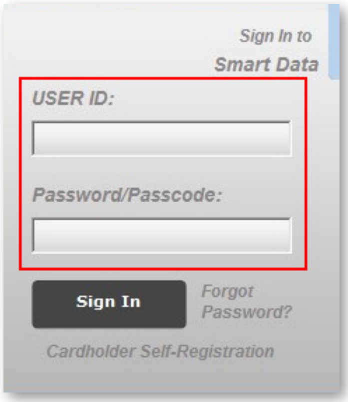
# Log On

1. Using your Internet browser, go to the following address: https://smartdata.jpmorgan.com
2. Enter the following on the *Smartdata* Sign In screen:.




- **USER ID:** Enter your user ID
- **Password/Passcode:** Enter your password

> **Note:** Your user ID and password are case-sensitive.

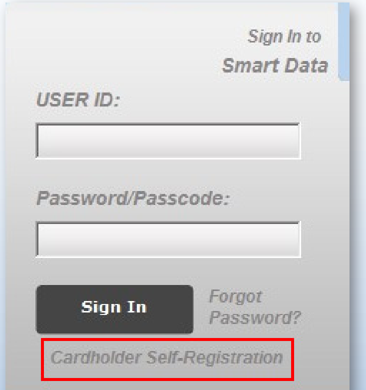
3. Click **Sign In**.

## Initial Log On: Cardholder Self-Registration

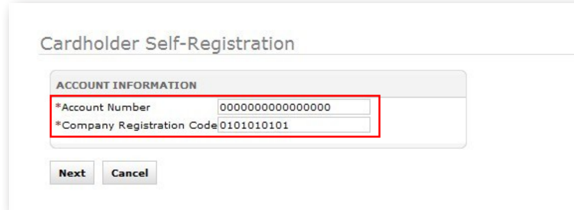
If your company has set up self-registration, please follow these instructions to create your *Smartdata* user credentials.

> **Note:** The program administrator must set up a company registration code in order for cardholders to use the self-registration process. Please contact your program administrator for the company registration code.

1. Click **Cardholder Self-Registration** below **Sign In**.

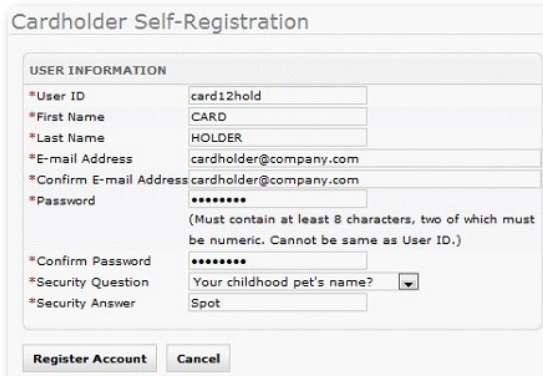



2. Enter the following in the Account Information fields:




- **Account Number:** Enter your 16-digit card number.
- **Company Registration Code:** Enter the code provided by your program administrator.

3. Click **Next**.
4. Complete the User Information fields:




- **User ID:** Enter your user ID. It must be alphanumeric with a maximum of 10 characters.
- **First Name:** Enter your first name.
- **Last Name:** Enter your last name.
- **E-mail Address:** Enter your email address.
- **Confirm E-mail Address:** Confirm your email address.
- **Password:** Enter your case-sensitive password. It must be at least eight characters with a minimum of two numeric characters. It cannot be identical to your user ID.
- **Confirm Password:** Confirm your password.
- **Security Question:** Select a security question from this drop-down menu. You must answer this question if you use the Forgot Password feature on the Sign In screen.
- **Security Answer:** Enter a response to your security question.

5. Click **Register Account** to save your credentials.
6. Click **Return to Login Screen.**
7. Enter your user ID and password.
8. Click **Sign In.**
9. Set your challenge questions. These must be answered each time you log on.

> **Note:** Each response must be a unique answer. Responses are case-sensitive and must be a minimum of four alphanumeric characters. Spaces are allowed. No punctuation or special characters are allowed. It cannot contain more than two identical characters in a row.



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10. Click **Submit** to save your settings.
11. For future login, follow steps 1-3 under “Log On” on page 2.
12. Optionally, after you log on, click **My Profile** to change your user profile information, such as your display name, password and email address.

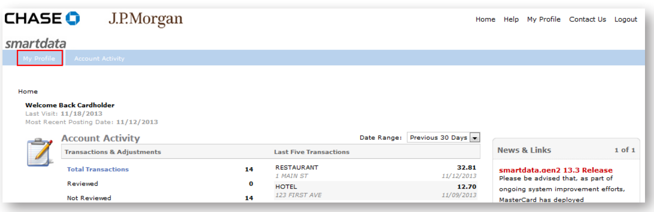
## Initial Log On: Manual Cardholder Setup

If your program administrator or manager set up your *Smartdata* user credentials, please follow these instructions.

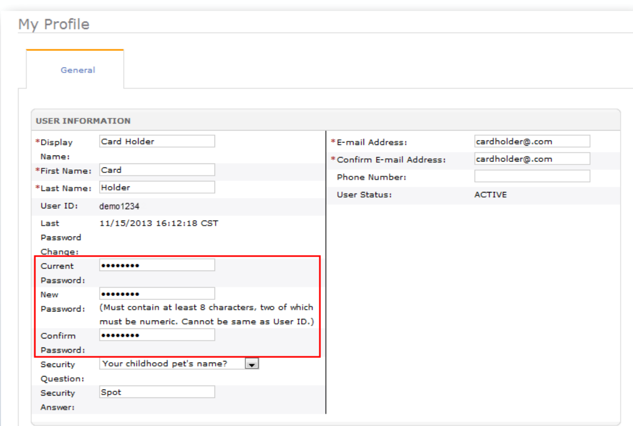
1. You will receive two emails from *Smartdata* (MasterCard Worldwide). One email contains your user ID and the other email contains your temporary password.
2. Once you have received your user ID and password, log on to change your password and set your security question and answer.

## Changing Your Password

1. Click the **My Profile** link. The My Profile screen displays.




2. Complete the following fields in the User Information section on the General tab:




- **Current Password:** Enter your current password.
- **New Password:** Enter your new case-sensitive password.
- **Confirm Password:** Confirm your new password.

> **Note:** Your password must be at least eight characters with a minimum of two numeric characters. It cannot be identical to your user ID. It must be a maximum of 20 characters in length.

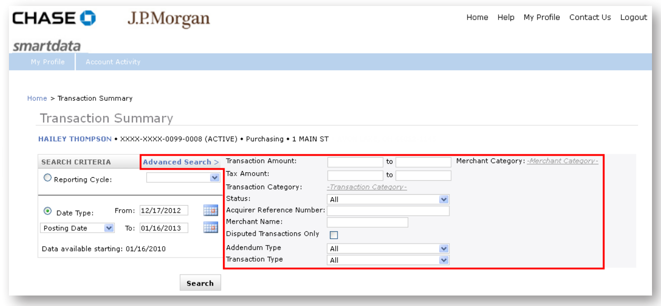
3. Click **Save**. The (*Cardholder name) successfully modified* confirmation message displays.

## Viewing Transactions

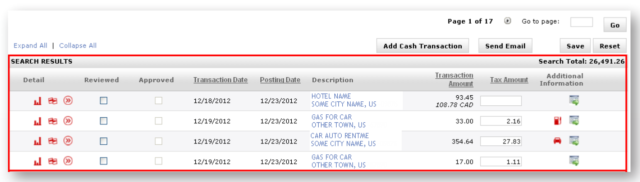
The Transaction Summary search screen allows you to look up your transaction data.

To view details of a transaction:

1. Use the Transaction Summary screen to search for the transaction. Select **Account Activity > Transaction Summary**.
2. In the Search Criteria, specify the date range to search by and click the **Search** button. Optionally, click **Advanced Search** to display filters that you can use to further refine your search results. The system returns all relevant transactions.




3. From the search results, click an icon in the Detail column to access detailed transaction information and related operations. Some of these icons are summarized in the list below.




- Transaction has been exported. You cannot change an exported transaction. For more information, see your manager or administrator.
- Transaction. Click icon to access financial and split transaction details.
- Cash transaction. Click icon to access transaction detail.
- Adjustment, such as a payment or card fee. Click icon to access transaction detail.
- Click to split the transaction or view split details.
- Click to access accounting detail. This icon does not appear if accounting codes are not used at your company or if there is no scheme assigned to the displayed account.

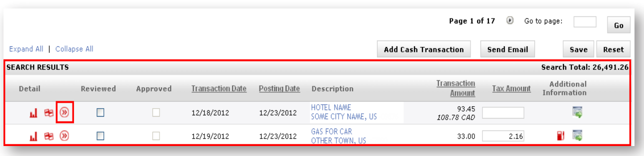
## Allocating Transactions to an Accounting Code

If required by your organization and enabled by your program administrator, you can allocate a transaction to an accounting code.

1. Use the Transaction Summary screen to search for the transaction. Select **Account Activity > Transaction Summary** and enter search criteria. The search results display.
2. Optionally, if you need to split the transaction, click the Split Transaction icon. The split detail displays.

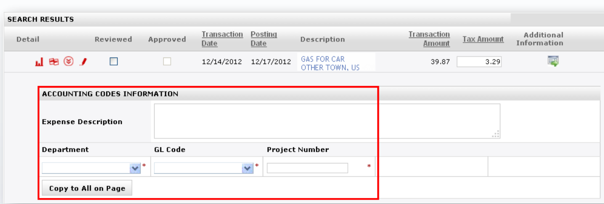
> **Note:** If you want to reallocate a transaction that has already been split, you must first click the Split Transaction icon, identify which of the split transactions you want to modify, then click the Accounting Detail icon to proceed with the reallocation.

3. Click the **Accounting Detail** icon for the transaction you need to change. The accounting codes information detail panel displays.



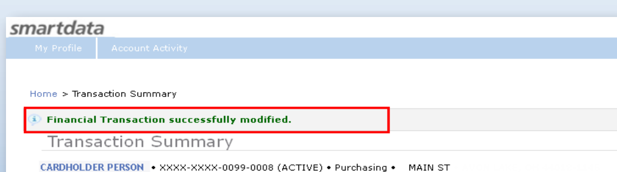
> **Note:** If a transaction is marked as reviewed or approved, you may not be able to make changes to the accounting codes. Please see your program administrator.

4. In the Accounting Codes Information section, complete the required fields for the transaction. Note that clicking **Copy to All on Page** will apply accounting codes to all transactions on the page.



*Required fields are marked with an asterisk.*

5. Click **Save**. The *Financial Transaction successfully modified* confirmation message displays.

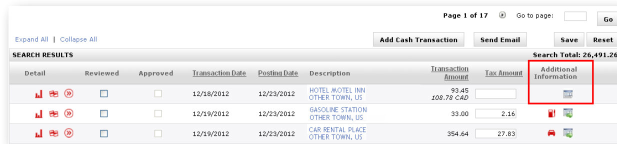



## Attaching Receipts to Transactions

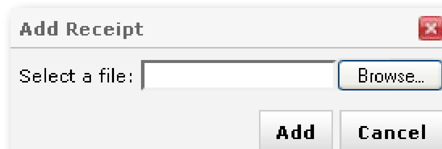
If enabled by your organization, you can attach receipts to transactions. You can add one image file to a transaction. The image file size limit is 4 MB, and file formats can be .jpg, .pdf, and .png. If you need to download receipts, see the *Account User's Guide*.

To attach a receipt image file to a transaction:

1. Select **Account Activity > Transaction Summary** and enter search criteria. The search results display.
2. Click the **Add Receipt** icon in the Additional Information column of the transaction. If the icon contains a green arrow, no receipt has been uploaded for that transaction.



3. Browse for your receipt image. Click **Browse** to locate the receipt file for the transaction, and click **Open**.

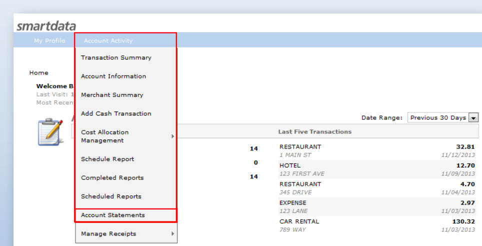



4. Click **Add** to upload the receipt.
5. The receipt icon changes to the View Receipt icon in the **Additional Information** column. If the icon contains no green arrow, an image has been attached to the transaction and is available for review.
6. Click **Save** to save changed transaction. The *Financial Transaction successfully modified* confirmation message displays.

## Viewing Statements

> **Note:** Only authorized users can access statements.

1. Select **Account Activity > Account Statements**. The Account Statements list displays.

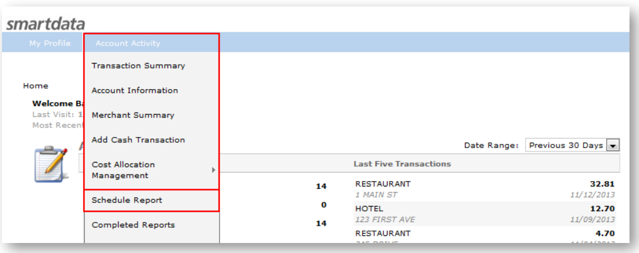


2. Select the statement from the list.

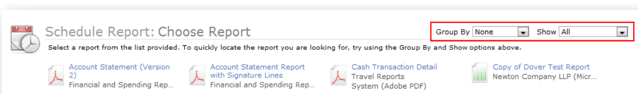

*The PDF statement opens and displays the amount due.*

## Running a Report

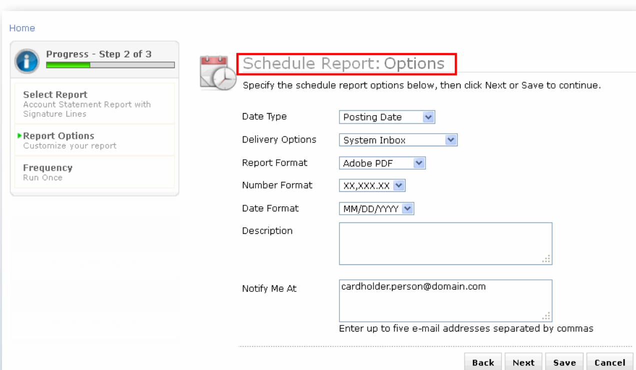
1. Select **Account Activity > Schedule Report**. The Schedule Report: Choose Report screen displays.




2. Click the name of the report you want to schedule. Sort the list of reports using the **Group By** and **Show** drop-downs.

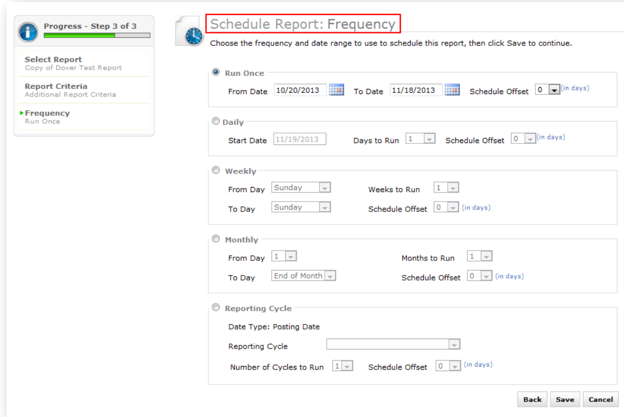



3. Complete the fields that display on the Schedule Report: Options screen.



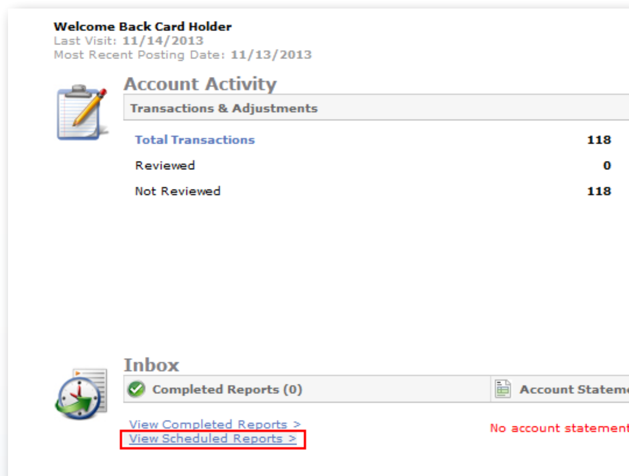

4. Click **Next**. The Schedule Report: Frequency screen displays.

5. Complete the fields that display.

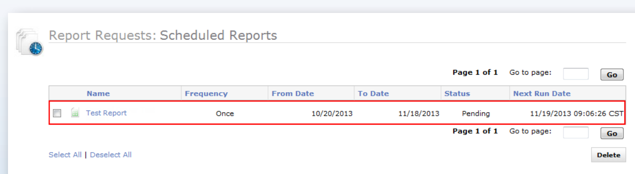



*The example above shows scheduling a report to run once.*

6. Click **Save**. The Schedule Report: Choose Report screen displays.
7. Click **Home**.
8. To view the reports scheduled to run, click **View Scheduled Reports** in your Inbox.




9. The Report Requests: Scheduled Reports screen displays your requested reports.



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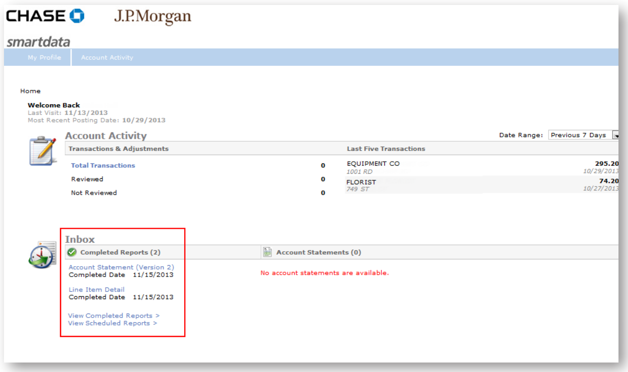
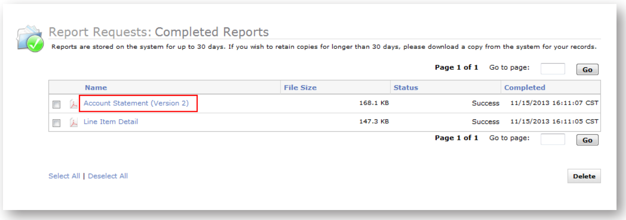
## Viewing a Completed Report

1. From the Home screen, locate your Inbox. Click the report name to open or save the file.




2. The Inbox displays only the first five reports. To view all completed reports, click the **View Completed Reports** link.
3. On the Report Requests: Completed Reports screen, click the name of the report you want to review. The report details display.




4. Optionally, click one of the following buttons:
   - **Download:** Click to download the report.
   - **Delete:** Click to remove the report.
5. Click **Home** to return to your Inbox.

**Note:** Reports are removed from the Inbox after 30 days. To keep a report longer than 30 days, download the report.



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