Quick Reference Card Overview

The topics in this Quick Reference Card describe key cardholder tasks, including how to log in to smartdata.gen2 and change your password; how to view transactions and statements; and how to run a report.

For additional information about these cardholder tasks, refer to the *smartdata.gen2 Corporate Cardholder Guide*. Double-click the paperclip icon to access the guide.

Logging In

Cardholder Self-Registration Instructions

The following instructions describe the cardholder experience:

- Launch your browser and navigate to the *Smartdata* Login screen at http://smartdata.jpmorgan.com
- Click on **Cardholder Self-Registration** under Sign In. Fill in the required information on the **Account Number** and **Company Registration Code.**
- Account # is your entire card #
- Company Registration Code is the # provided by your Card Administrator.
- Complete all items with red asterisk.

- **Remember the login ID and Password you created for future logins.**

Changing Your Password

1. Click the **My Profile** tab.
2. On the **My Profile** screen, find the **User Password** window.
3. In the **Current Password** field, enter your current password.
4. In the **New Password** field, enter your new password.
5. Click the **Save** button.

Viewing Transactions

1. Select **Account Activity > Transaction Summary**.
2. Complete the search fields on the **Transaction Summary** screen. To search for transaction data, select a reporting cycle or a date range.
3. Click the **Search** button. The transactions that match your search criteria display.

Viewing Statements

1. Select **Account Activity > Account Statements.**
2. Click the statement you want to view on the **Account Statements** screen.

Allocating a Transaction

1. Use the **Transaction Summary** screen to search for the transaction you want to allocate.
2. Click the **Accounting Detail** icon ( ) for the transaction you need to change. The accounting detail displays.
3. To split a transaction, or to view a transaction that has been split, click the **Split Transaction** icon ( ). The split detail displays.
4. In the **Accounting Codes Information** section, click **Edit Accounting Codes**.
5. Modify the fields as needed.
6. Click **Save Accounting Codes.**

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Disputing a Transaction

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

1. Select **Account Activity > Transaction Summary**.
2. On the **Transaction Summary** screen, search for the transaction data you want to view. Smartdata.gen2 displays the transactions that match your search criteria.
3. Click the **Transaction Detail** icon for the transaction you want to dispute.
4. Click the **Dispute Transaction** icon.
5. Select a **Dispute Reason**.
6. Enter any additional required information.
7. Click the **Apply** button.
8. Print the template and either fax, email, or mail the form to the J.P. Morgan Dispute Department:

Commercial Card Services

Attn: Dispute Department

P.O. Box 2015

Elgin, IL 60121-2015

Email: CCS-Disputes@jpmchase.com

Fax: 847-931-8862

Running a Report

1. Select **Account Activity > Schedule Report**.
2. On the **Schedule Report: Choose Report** screen, click the name of the report that you want to run.
3. Complete the fields that display on the **Schedule Report: Options** screen.

> Note: Enter your email address in the **Notify Me At** field to be notified when the report is complete.

4. Click the **Next** button.
5. Complete the fields that display on the **Schedule Report: Frequency** screen.

> Note: You should schedule the Account Statement Report to run the day after cycle.

6. Click the **Save** button. Smartdata.gen2 saves the report settings and schedules the report.
7. To view completed reports, select **Account Activity > Completed Report**.

Viewing a Completed Report

1. Find your Inbox on the home page. Completed reports display in your Inbox as hyperlinks.
2. Click the hyperlink for the report you want to view. A dialog box displays and prompts you to open or save the report.
3. To view the report, click the **Open** button. To save the report, click the **Save** button. When you open a report, the report displays in .pdf format.

Cardholder Support

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

- United States: 1-800-316-6056

Possible inquiries include:

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

> Note: Cardholder Support cannot assist with questions specific to smartdata.gen2.