Mastercard® Smartdata.gen2™ *(Smartdata)*

Cardholder Quick Reference Card

WELCOME TO SMARTDATA

The Home screen displays each time you log in to *Smartdata*. It provides access to account activity, reports, transaction reviews, and other information about your commercial 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 here. 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. Activity
Contains important general account information.

D. Reports and Data Files
Contains information about scheduled and completed reports, along with data files.

E. News
Provides contact information and news about upcoming releases.

F. Review Required
Specifies the transactions awaiting your review and approval.

G. Links
Displays links to additional resources.

H. Snapshots
Displays a quick view of transaction spend for the current month.

I. Resource Center
Provides application user guides, interactive tutorials, online help, and policies and procedures.

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

QUICK TOPICS

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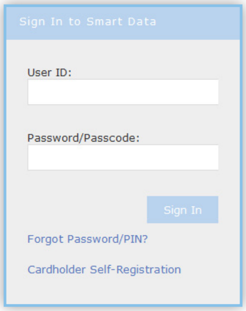
LOG IN

Once you are assigned a user ID and password, you can log in to the site.

1. Using your Internet Browser, go to your Smartdata login home page.
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.

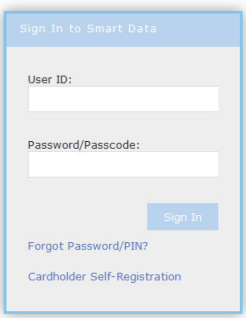
3. Click **Sign In**.

INITIAL LOG IN: SELF-REGISTRATION

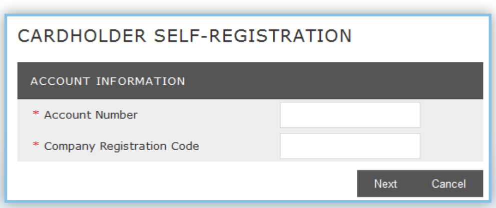
If your company has set up self-registration, please follow these instructions to create your Smartdata user credentials.

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 dropdown 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 in.

   Note: Each response must be a unique answer. Responses are casesensitive and must be a minimum of four alphanumeric characters. Spaces are allowed. No punctuation or special characters are allowed. Reponses cannot contain more than two identical characters in a row.
10. Click **Submit** to save your settings.
11. Optionally, after you log in, click **My Profile** to change your user profile information, such as your display name, password and email address.

INITIAL LOG IN: MANUAL CARDHOLDER SETUP

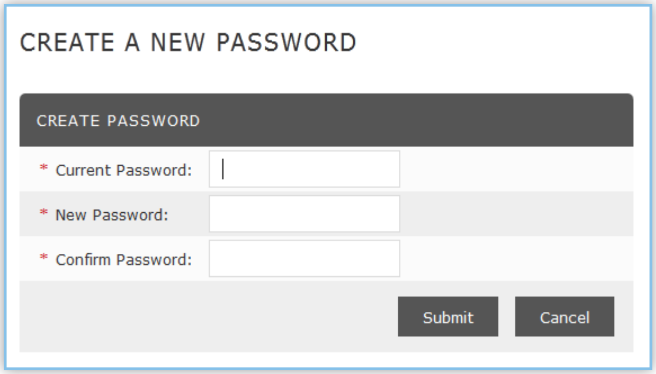
Once your program administrator or manager configures your *Smartdata* user credentials, follow these steps to log in:

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 in to change your password and set your security question and answer.

CHANGING YOUR PASSWORD

You can change your password on the My Profile screen.

1. Click **My Profile**. The My Profile screen displays.
2. Click **Change Password**. The Change Password screen displays.



3. Complete these fields:
   - **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.

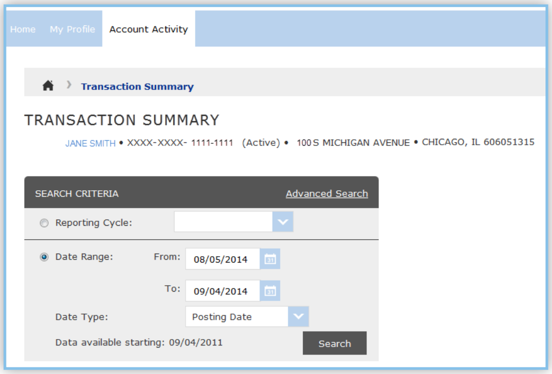
4. Click **Submit**. The new password is saved and the My Profile screen displays.

VIEWING TRANSACTIONS

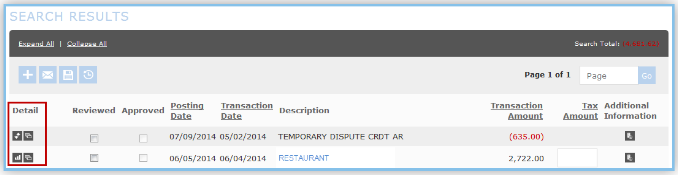
You can search for and review transaction details on the Transaction Summary screen.

To view transaction details:

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 a sign in the **Detail** column to access detailed transaction information and related functions.



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ALLOCATING ACOUNTING CODES

If required by your organization and enabled by your program administrator, you can assign accounting codes to a transaction. Accounting codes identify the type of product or service purchased.

1. 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** sign The Split Detail screen displays.

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

3. Click the ***Accounting Detail*** sign 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.

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

ATTACHING RECEIPTS TO TRANSACTIONS

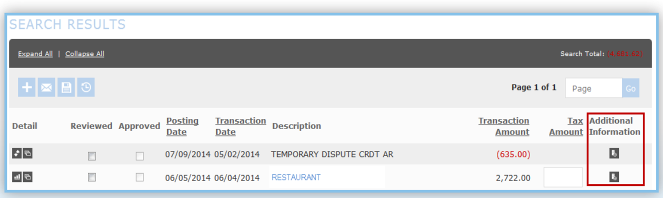
If enabled by your organization, you can attach receipts to transactions.

Transaction receipts must be attached as images. The image file size limit is 4 MB, and the supported file formats include .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** sign in the **Additional Information** column of the transaction.



3. Browse for the 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** sign changes to the **View Receipt** sign in the **Additional Information** column. If the sign contains no green arrow, an image has been attached to the transaction and is available for review.

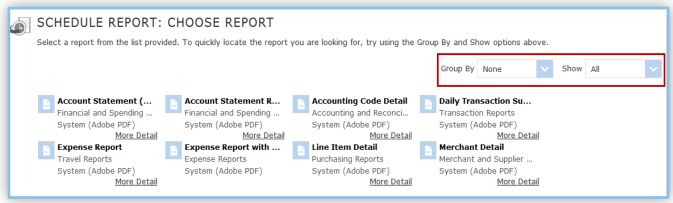
6. Click **Save** to save changed transaction. The Financial Transaction successfully modified confirmation message displays.

RUNNING A REPORT

Reports provide important transaction and account details in a summary view.

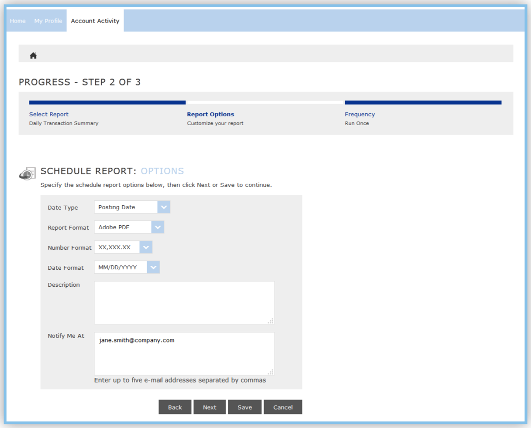
1. Select **Account Activity > Schedule Report**. The Schedule Report: Choose Report screen displays.

2. Click the name of the report you want to schedule. To quickly find a report, use the filter options on the **Group By** and **Show** drop-downs.

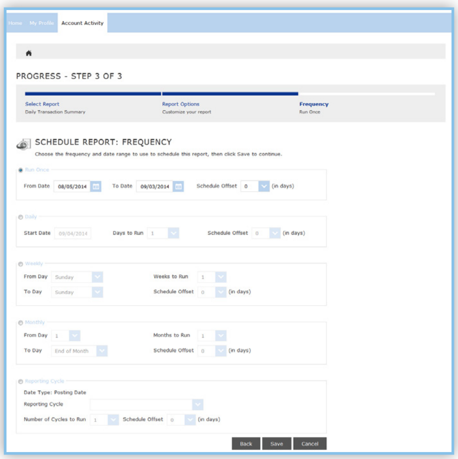


RUNNING A REPORT *(continued)*

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

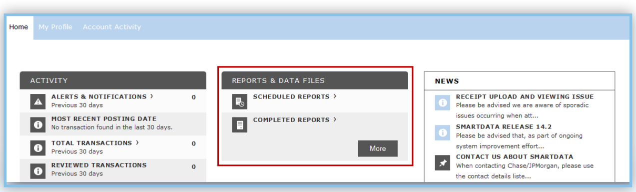


4. Click **Next**. The Schedule Report: Frequency screen displays.
5. Complete the fields that display.



The example above shows scheduling a report to run once.

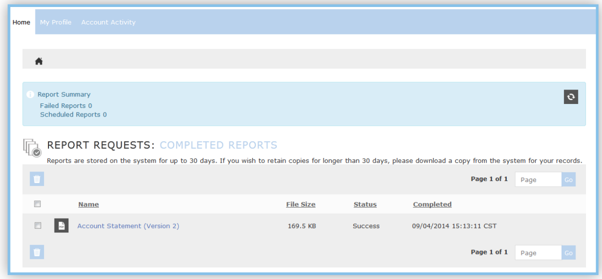
6. Click **Save**. The Schedule Report: Choose Report screen displays.
7. Click **Home**.
8. To view the scheduled reports, click **Scheduled Reports in the Reports and Data Files** section.



VIEWING A COMPLETED REPORT

You can view and download completed reports from the Home screen.

1. From the **Home** screen, click **Completed Reports** in the **Reports and Data Files** section.
2. On the **Report Requests: Completed Reports** screen, click the name of the report you want to review.



3. Optionally, click one of the following buttons:
   - **Download**: Click to download the report.
   - **Delete**: Click to remove the report.
4. Click the **Home** sign to return to the **Home** screen.

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