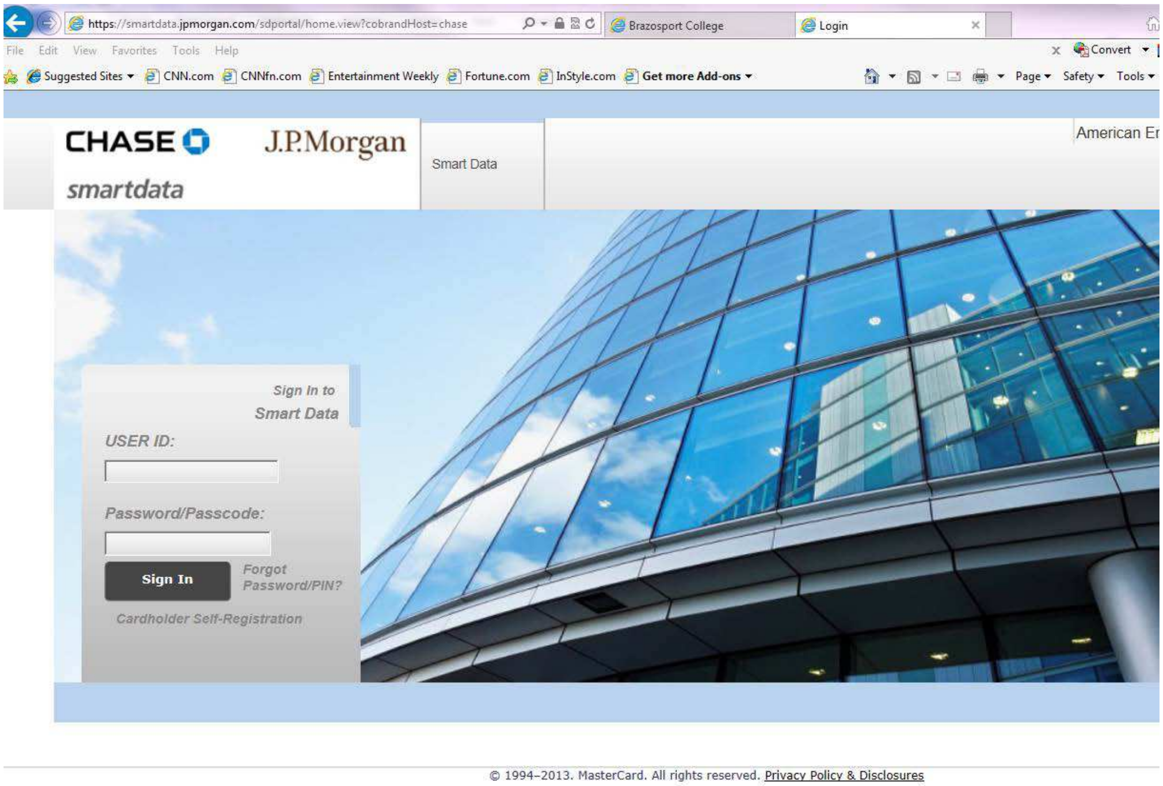
JPMorgan Chase Procurement Card Users Guide

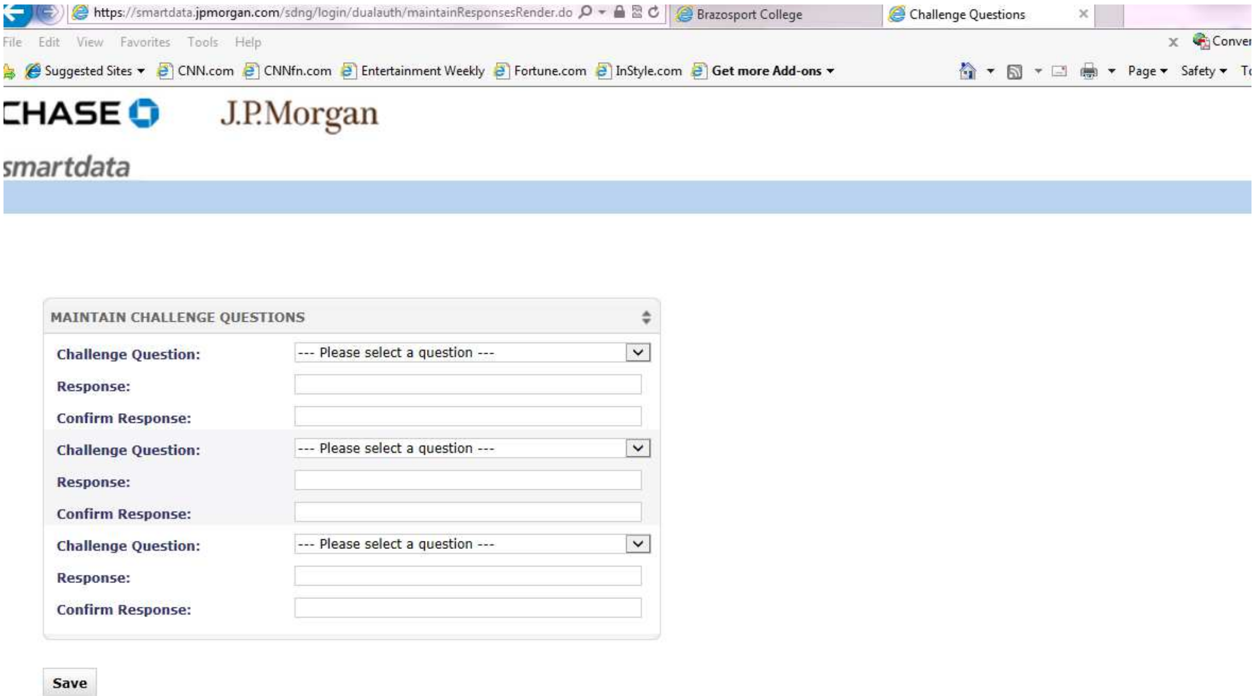
The website URL is: https://smartdata.jpmorgan.com



User ID: ______________________

Password: ____________________

Select any three Challenge questions and note your response. Remember the answers are case sensitive.



Use the spaces below to write your answers. The response is case sensitive.

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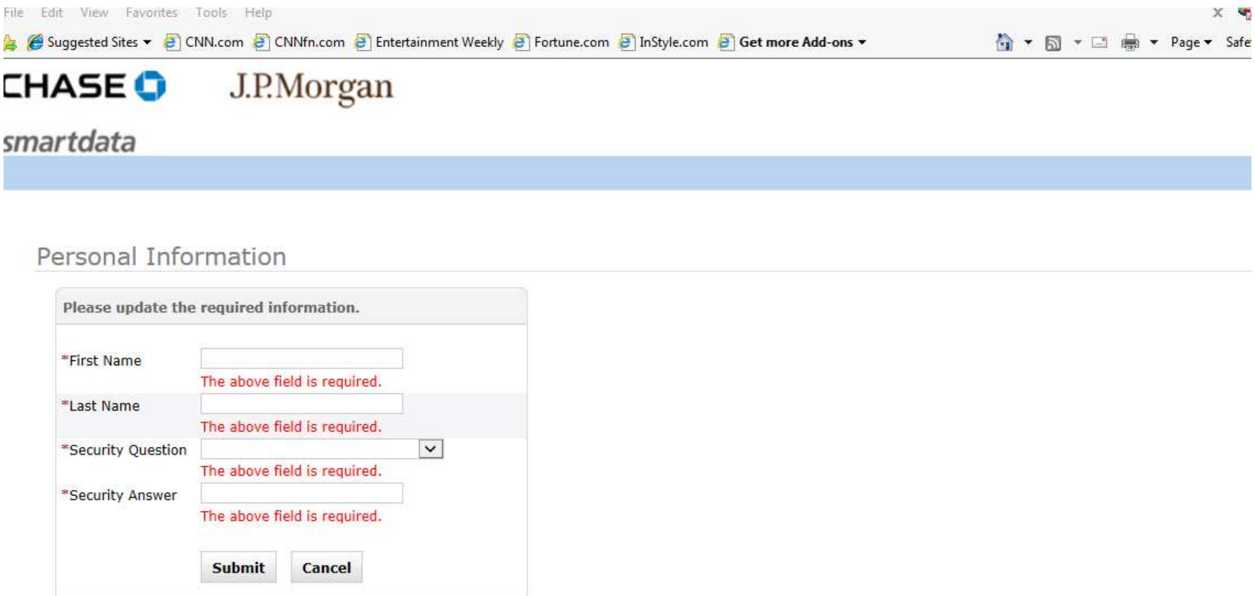
You will now have to enter your First and Last Name and select a security question and enter the response. Again, remember the system is case sensitive. Note your response below.



Write your response below. Remember the response is case sensitive.

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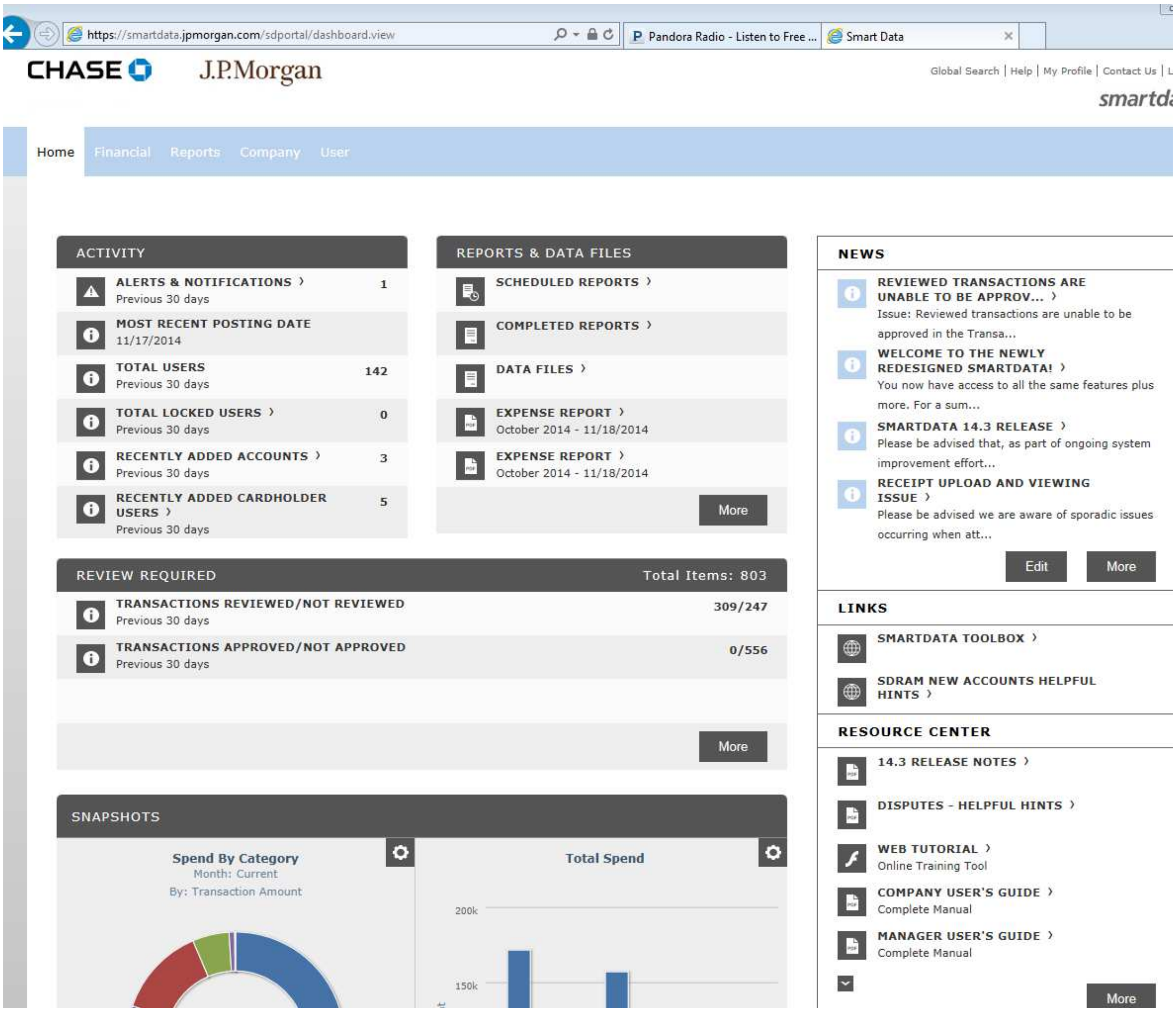
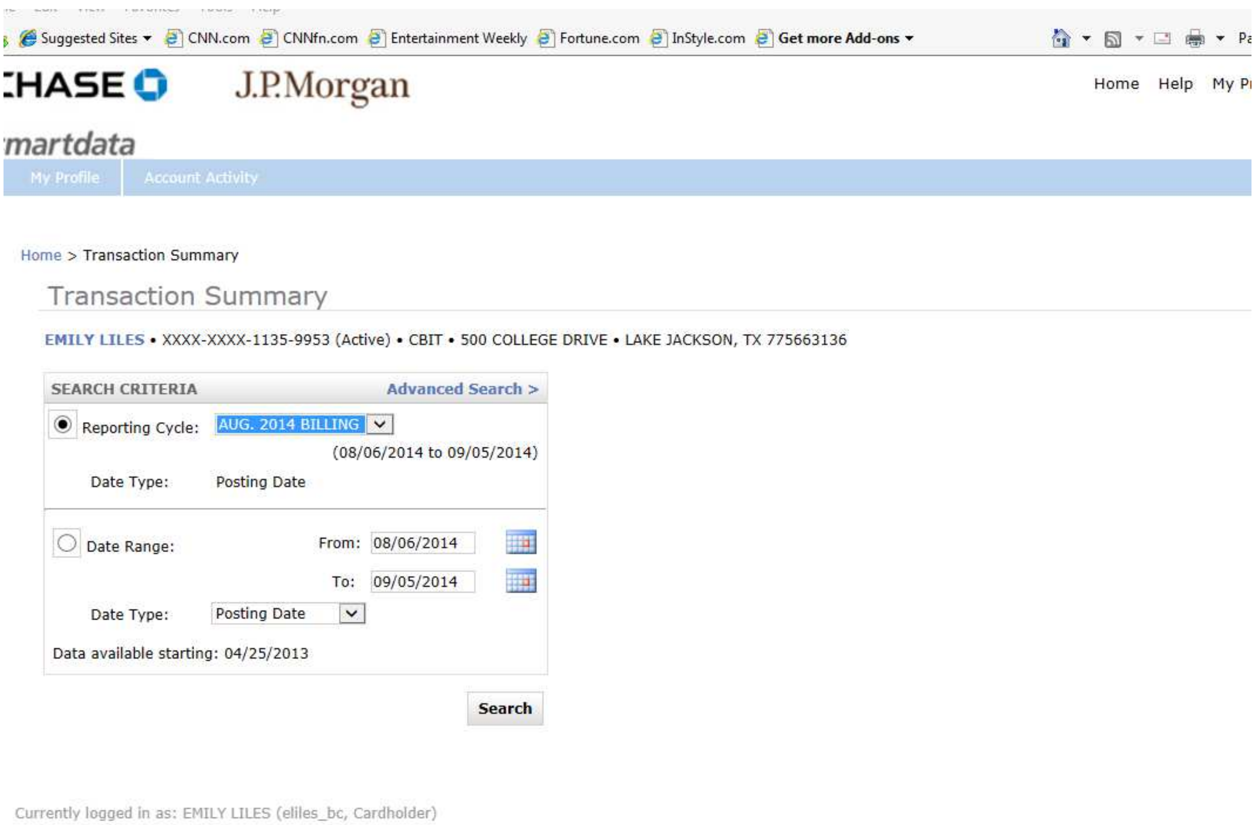
The home page contains some general data, including your last five transactions. This is where your expense report will be sent each month. There is also a link to a Web tutorial, if interested. **Note: The screenshot below is of my site – which is different than what you will have. Don't worry!**



You will select “Transaction Summary” under the Account Activity tab. Remember the college only uses “Reporting Cycle”. After selecting “Reporting Cycle”, click on the drop down arrow and select the appropriate report cycle. Click the “Search” button.



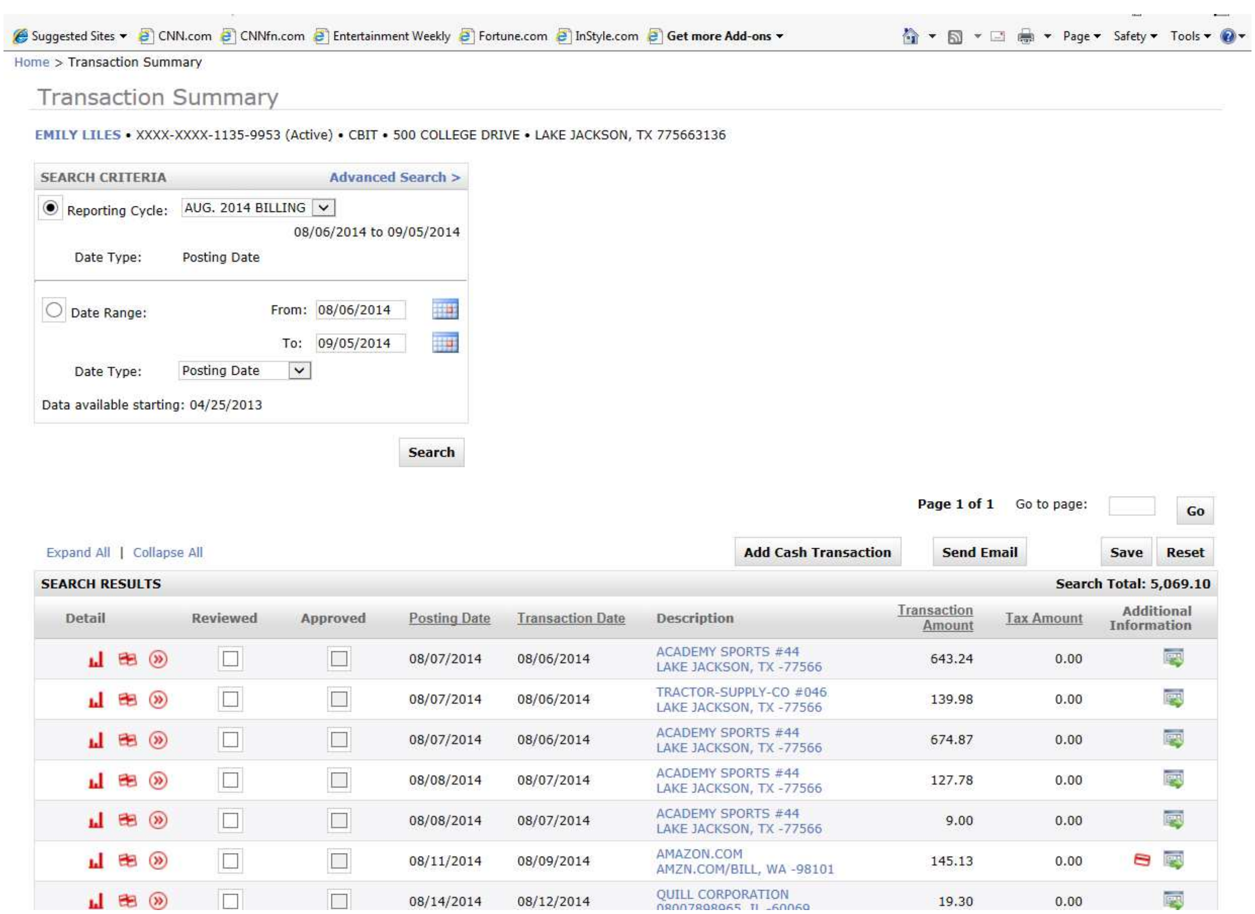
The first icon shows vendor detail. If a transaction is disputed, you may be able to see the vendor's telephone number as well as some general company data.

The second icon is a split transaction icon. Create your splits. You will have to enter an expense description and then save. You can enter the amount of a split by percentage or actual dollar amount. You will then need to allocate the charges to the appropriate accounts and then check the reviewed box. Always save your data!

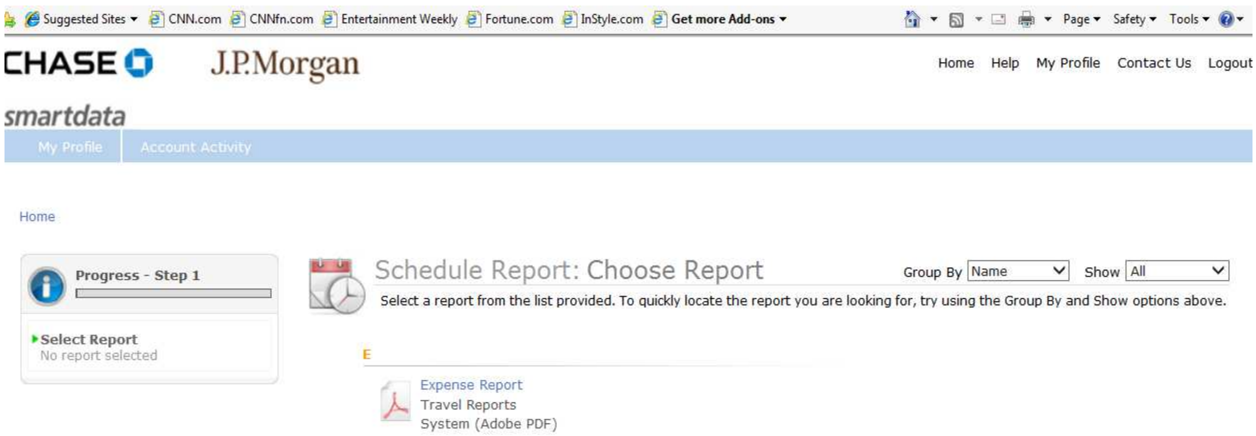
The third icon is for allocating your charges. Remember to select only an account within your department. The "Fund" is a drop down box. It list every fund within the college. The "Dept" is a data entry field. The "Account" is also a drop down box. There is a "Starts With" line at the top. If you enter the first couple of numbers, the system will direct the search to that sequence. Remember, this drop down box list the accounts for the entire college. Make certain that you select an account within your area.

After you allocate a charge you will need to click in the check box under "Reviewed". You will then need to click on the "Save" button. This will save your data. Do not check the box "Approved". This box is used for e-mailed reports only. The college does not use this function.

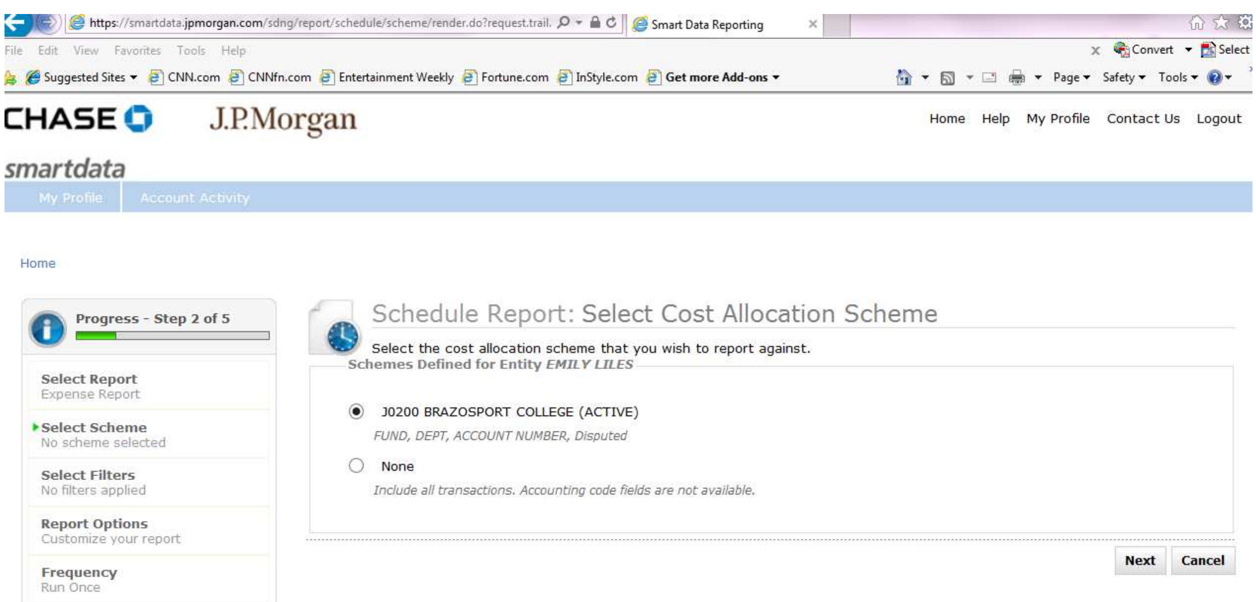
I cannot encourage each of you enough to allocate your charges throughout the month. This step will greatly speed up the month-end process.



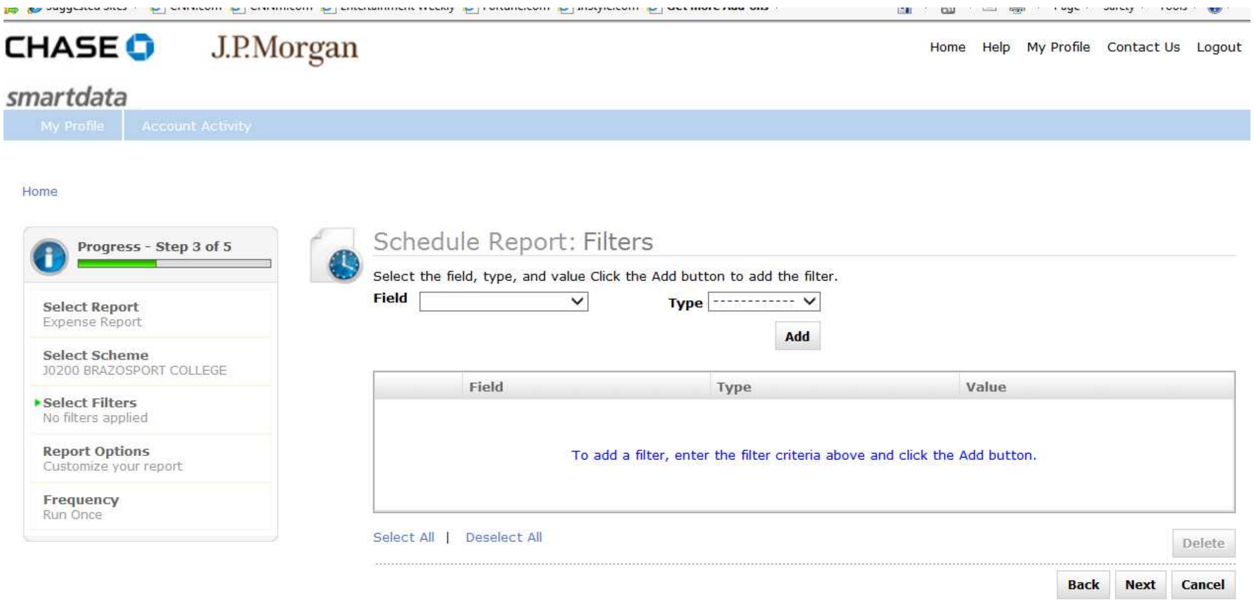
To run your monthly report you will click on “Account Activity” tab. Select “Schedule Report” and then click on “Expense Report”.



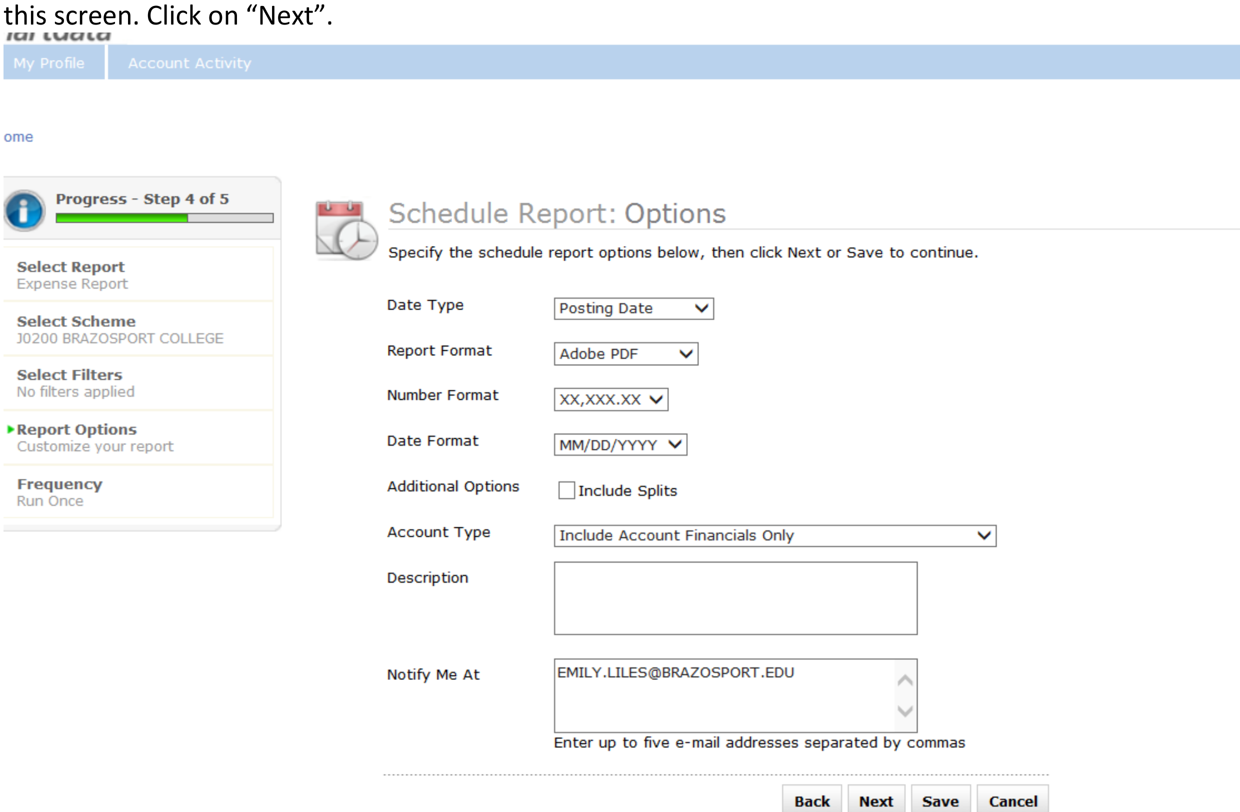
If not already selected, select J0200 Brazosport College and click “Next”



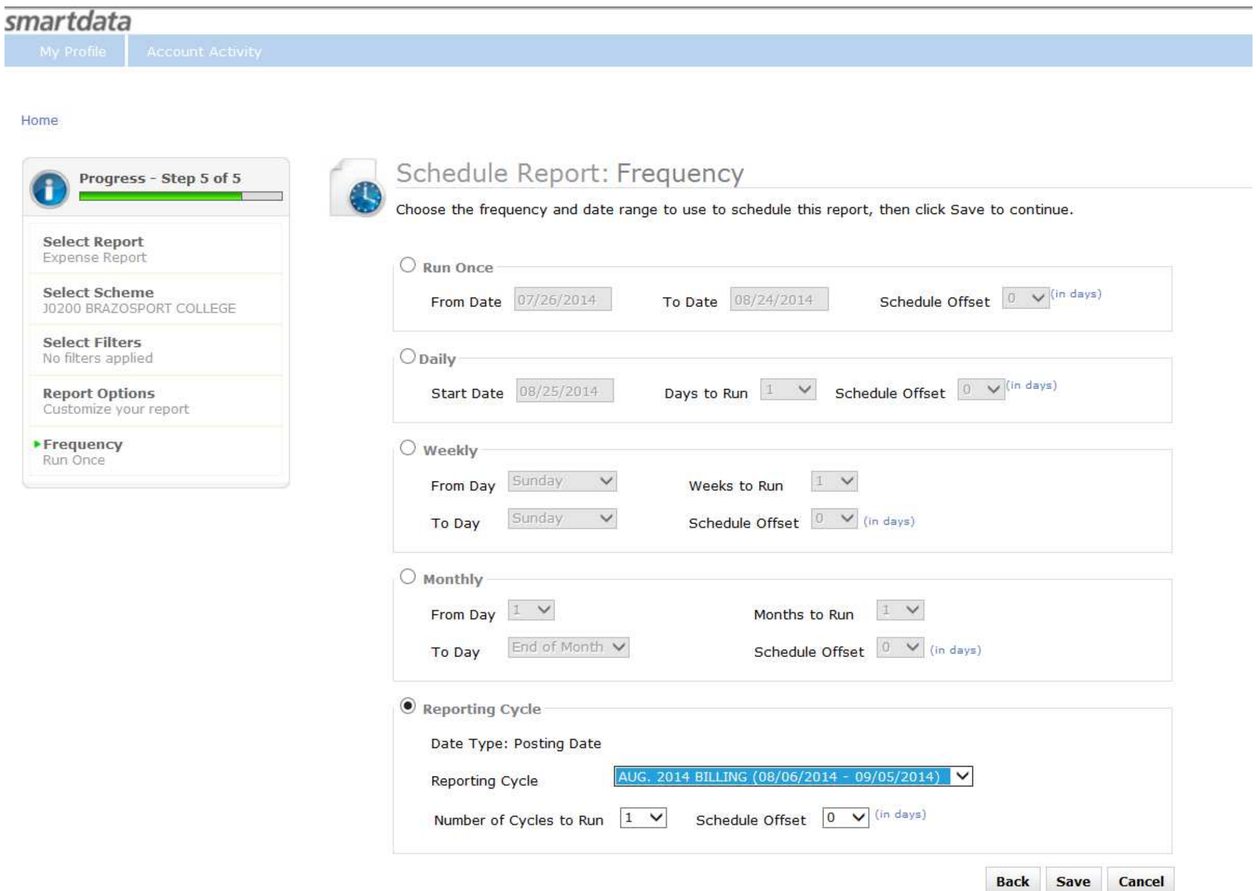
Do not fill in any information on this screen, simply click "Next"



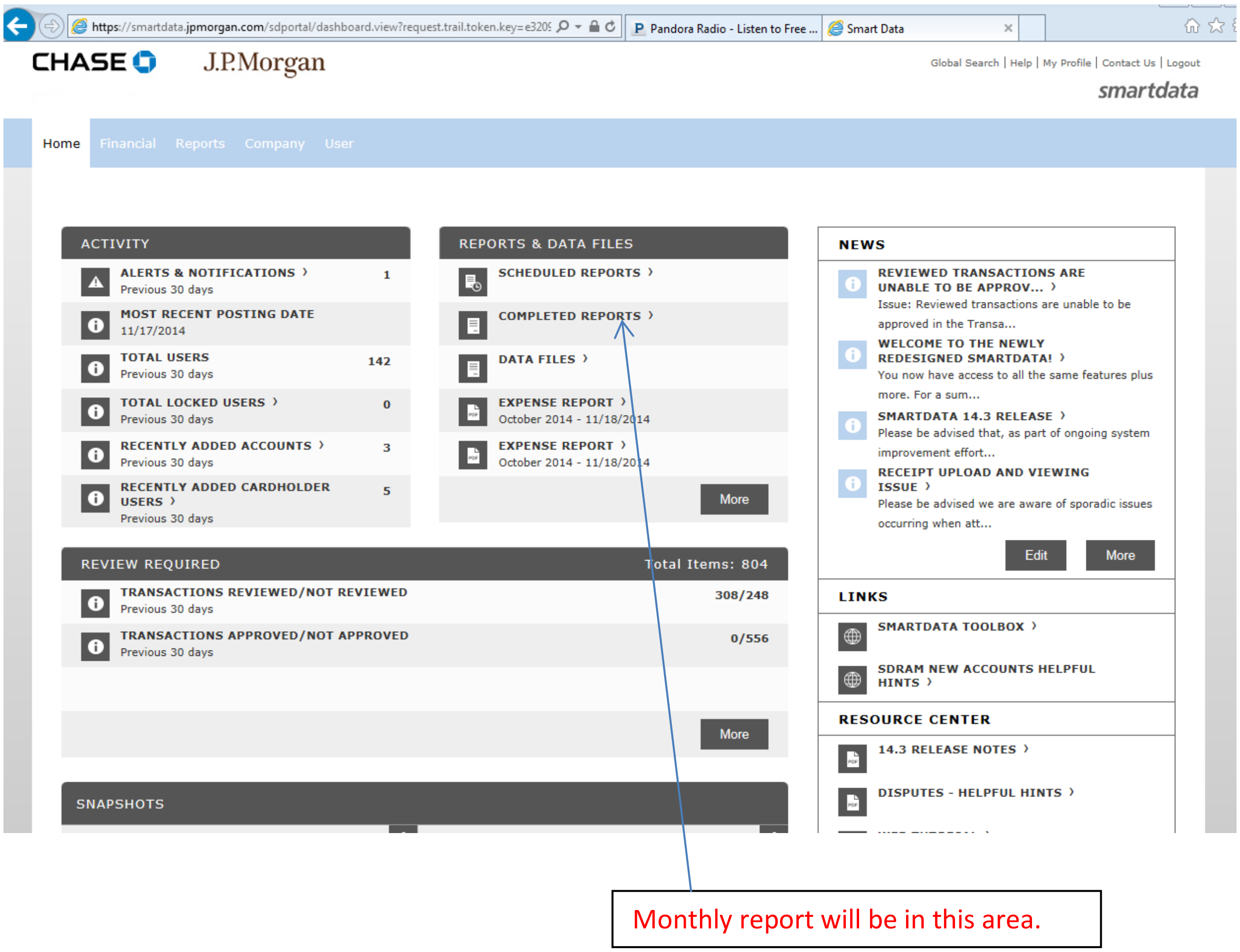
If you have split any transactions, you must click in the “Include Splits” check box “ It is a good habit to always check this box. I recommend that you put the month and year in the Description text box. This is not mandatory, but will identify the report when it is sent to you. You will not change any other data on this screen. Click on “Next”.



Under “Schedule Report: Frequency” select “Reporting Cycle” (bottom of page) and then use the drop down menu to select the correct reporting cycle. Click the “Save “ button.



You will receive notification via e-mail that your report is ready to view. There will be a link in the e-mail. I recommend that you do not use this link. Log on to the actual website. Your report will appear under the “Inbox” section of your home page. You will open the report, print it out, attach all receipts, sign, and have the appropriate approvers sign the report. The report is due in Accounts Payable the **10th** of each month.



You can delete any reports located within the “Completed Reports” section. Check the report you want to delete and click on the trash can.