smartdata.gen2
Cardholder Instructions for signing on and running transaction reports
1. **Application Access:** Click on the below link or copy it into your internet browser –
   https://corporatecardservices.bnymellon.com

2. **User ID** – cardholder initial user ID is always their **full card account number**

3. **Password** – Enter `changeme01` for the initial password.
1. **Create User ID**: Enter the user ID to log into the system going forward. Use the first letter of your first name plus the first 7 letters of your last name plus “card” (for cardholder). (Example: My name is Joe Anderson. My ID = jandersocard)

2. **Re-enter User ID** – Enter User ID a second time to confirm.

3. **Press Continue** – Press Continue to go to the next screen to change your temporary password.
1. **Enter the Temp Password:** Enter temp password. (changeme01)

2. **Enter the New (Final) Password**– Enter the password that you will use going forward until the system asks you to reset your password. (Every 90 days.) *The password must be at least 8 characters, of which at least two must be numeric and two non-numeric, and must not contain any spaces.

3. **Re-enter Final Password**

4. **Enter E-mail Address**

5. **Re-enter E-mail Address**

6. **Select Security Question:** This is the question that you will be asked if you need to have your password reset. *Remember the question you chose and the answer.

7. **Enter Security Answer:** The Security Answer must be at least 4 characters long and cannot contain spaces. It is case sensitive, too.
1. Click on the **Account Activity** tab and **Schedule Report**
2. **Select the Line Item Detail – Vendor Spend report.**
3. Leave **Date Type** as **Posting Date** and **Review Status** as **All**. If you would like to be notified by email when the report completes, the **Notify Me At** box should contain your email address, so leave the address in the box.

4. Press the **Next** button.
5. Select the appropriate **date range** option or Statement Date range (**Reporting Cycle**) that corresponds to your statement date range. If you run the report on a date before the end date of the cycle range, the report will not complete until the day after the end date of the cycle range.

6. Press **Save**.

**Note:** Transaction data will be viewable in the system (on the report) approximately 2-3 days after the transaction takes place at the merchant. If you do not see transactions on the report that are on your statement, they may not have loaded into the system yet.
The system will return you to the **Schedule Report: Choose Report** screen. You will see the report on the left side of the screen in the Scheduled Reports section. You will need to refresh the screen to view the report when it moves to the **Completed Reports** section. You can do this by pressing the F5 key on your keyboard.

You may also leave the application to wait for the email notification. Once you are notified by email, you can log back into the system to open and view the report. It will be located in the **Completed Reports** section on the home screen.
Opening the Report

- Click on the report to open or download the report.