Getting started check list

**SDOL Sign In:**

* For your **initial** sign on to Smart Data Online (SDOL) go to: <https://sdol.mastercard.com/jpmorganchase>
* The user name: (for your **FIRST** log on **ONLY**)is your 16 digit P-card number and your initial password is: **temp1234XXXX** (Last 4 digits of your P-card)
* This will bring you to the screen to enter a new password. This will be your permanent password. Your permanent password must be 8-20 characters and 2 MUST be numeric (CASE SENSITIVE)
* You will next be prompted to enter your permanent user name; this must be your prefix to your Southern email address (i.e. smithr1)

**Reconciling Your Transactions:**

The next step will be reconciling your transactions. After you sign in (using your permanent user name & password):

* Click on the **Financial Tab** (Top Red Tabs) then choose the billing cycle\* you need to review and click “view”. This will show your transactions for the billing cycle you chose.
* Click “**Expand All**” then edit the account field through the drop down menu and choose the correct account code for the purchase (i.e. 771100 Office Supplies)
* Type a brief summary of the purchase in the “**Expense Description**” field (i.e. TA #, what you purchased, work order #, etc.)
* Click the “**cardholder reviewed**” box (a “check mark” will appear in box)
* Click “**Apply**” (it will not save the changes if you do not click apply)
* Click on the **Report Tab** (Top red tabs) and click on “**Account Statement Report**”. Select the billing cycle you wish to run and also select the Print Version (pdf) box.
* Then click “**Run**” (If you have pop-up blockers installed on your PC the yellow space below the toolbar will request that you “click here for options; download file”. Unfortunately, once you click there, the system will bring you back to the **Financial Tab** main page. You will need to repeat the steps above to finally get your report.

\*Billing cycle is the 26th to the 25th