

Smart Data

Changes to Cardholder Landing Page
scheduled for February 2024



Smart Data – Change to Cardholder Landing Page

Change will occur on February 10, 2024

Current

The current interface features a top navigation bar with 'Account Activity' and 'Reports'. The main content area is titled 'HOME' and is divided into several sections: 'ACTIVITY' with alerts and notifications, 'REPORTS & DATA FILES' with scheduled and completed reports, 'NEWS', 'LINKS', and 'RESOURCE CENTER'. A 'REVIEW REQUIRED' section lists items for approval, such as 'ABC HOTEL' and 'AIRLINE'. At the bottom, there are 'SNAPSHOTS' including a 'Spend By Category' donut chart and a 'Total Spend' bar chart.

New

The new interface features a top navigation bar with 'Help', 'Contact Us', and 'Cardholder - XXXX-1579 - BRIANNA'. The main content area is titled 'Your dashboard' and includes a 'Transaction Summary' card showing 'BRIANNA's corporate card ** 1579' with an available credit of 19,250.00. Below this is a 'Transaction Summary' table showing 3 card transactions of 6 total transactions. The table lists transactions for Construction Materials Inc, Olympus Hardware, and Jack's Diner. A 'Reports' section shows 4 of 4 reports, including 'Line Item Detail', 'Detail Spend Analysis by Account', 'Daily Transaction Summary', and 'Spend Analysis by Merchant'. A 'Data Files' section is at the bottom.

Transaction	Amount	Status
Construction Materials Inc 01/08/2024	\$3,800.00	Open
Olympus Hardware 01/06/2024	\$1,734.70	Open
Jack's Diner 01/02/2024	\$47.54	Open

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The screenshot shows a cardholder's dashboard with the following sections:

- Account Activity / Reports:** A top navigation bar with a dropdown menu for the cardholder's name.
- Welcome back, Brianna / Your dashboard:** A personalized greeting and dashboard title.
- Account Information:** A card for "BRIANNA's corporate card •• 1579" showing "Active" status, "Available credit" of 19,250.00, and a "Credit Limit" of 24,000.00. A card icon is also visible.
- Transaction Summary:** A section showing "Showing 3 card transactions of 6 total transactions". It includes a table of recent transactions and a "Go to transactions" link.
- Reports:** A section showing "Showing 4 of 4 reports" with a "Go to reports" link. The reports listed are: "Line Item Detail", "Detail Spend Analysis by Account", "Daily Transaction Summary", and "Spend Analysis by Merchant".
- Data files:** A section at the bottom for downloading data files.

Menus remain unchanged

Account Information

Click on icon to access eStatement and Details

See card statement
Account details

Access to recent reports with details

Access to Transactions from Homepage

The Resource Center provides access to

- Documents
- Links (URLs)

Most recent card transactions

A single link to the Reports Dashboard