JP Morgan Smart Data update
August 2026

Log in to Smart Data and click **View Expense Inbox** to review your transactions. Click the carrot on the far right of each transaction to open the transaction summary and fillable/required fields.

Business Justification (description) and **Cost Allocation** (account codes) must be entered and **Saved** for each transaction. <u>These steps fulfill the requirements needed to successfully run the required monthly</u> **<u>expense report</u>**<u>.</u> You do not need to upload receipts digitally as this feature is not required or reviewed by A&F. All other monthly reporting procedures remain the same.

The *Submit* button locks the transaction from any further editing and removes it from your “open” items inbox list but is not required to fulfill the A&F pcard monthly reporting requirements. Once *submitted*, you cannot edit the descriptions/codes without A&F manually unlocking that transaction. A&F recommends cardholders who choose to use this feature only click submit after the month-end expense report is complete to preserve their ability to make edits throughout the month. Older transactions from previous months may be submitted at any time to clear them from your open inbox.