Santander Commercial Banking

October 2023

Santander Commercial Card

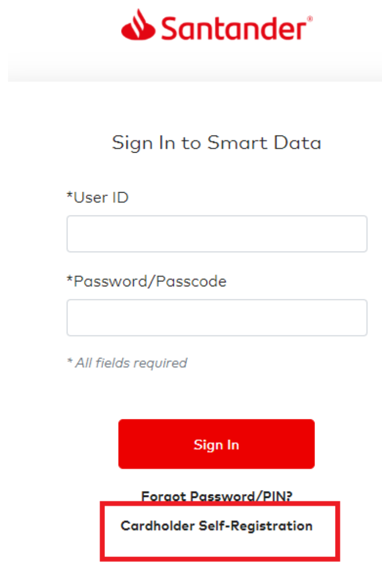
Smart Data Expense Management Guide

For Level Managers (Approvers)

1 Getting Started with Smart Data

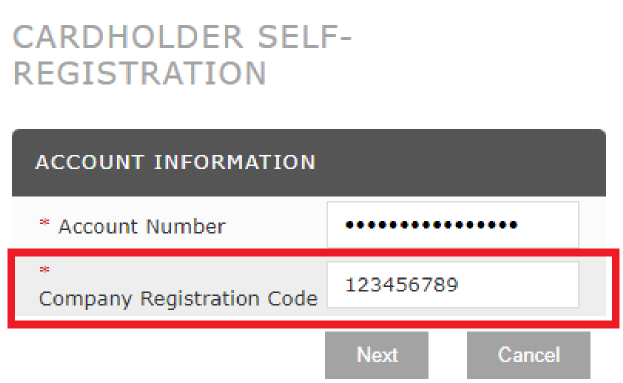
You may have been provided with a user ID and password by your program administrator, if not you will need to self-register.

<table>
<tr><th>Step</th><th>Action/Information</th></tr>
<tr><td>1</td><td>Go to: smartdata@santanderbank.com and click Cardholder Self Registration below the sign-in window



</td></tr>
<tr><td>2</td><td>Enter the following in the Account Information fields and click Next

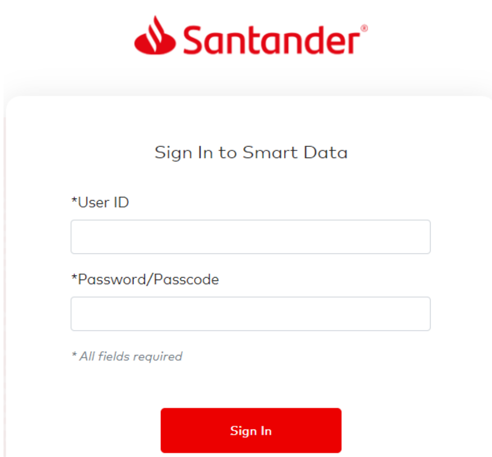
- Account Number: Enter your 16-digit card number.
- Company Registration Code: Enter the code provided by your program administrator.



</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action/Information</th></tr>
<tr><td>3</td><td>Complete the User Information fields and click Register Account to save your credentials.

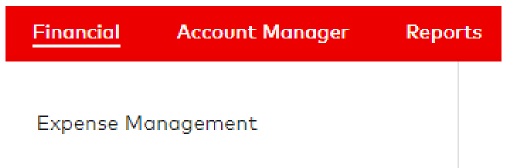
</td></tr>
<tr><td>4</td><td>Click Return to Login Screen, enter your user ID and password, and click Sign In.



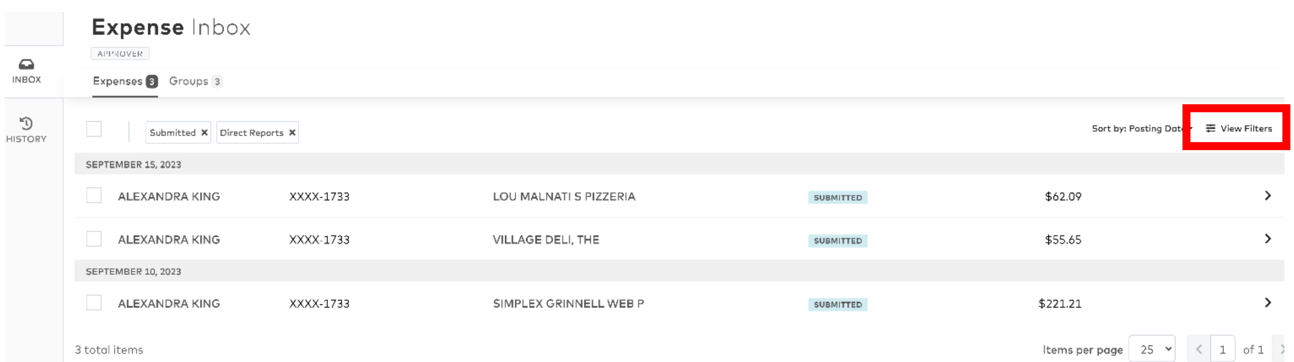
</td></tr>
</table>

2 Approving Expenses

<table>
<tr><th></th><th>Action/Information</th></tr>
<tr><td>1</td><td>From the home screen, choose Financial and Expense Management

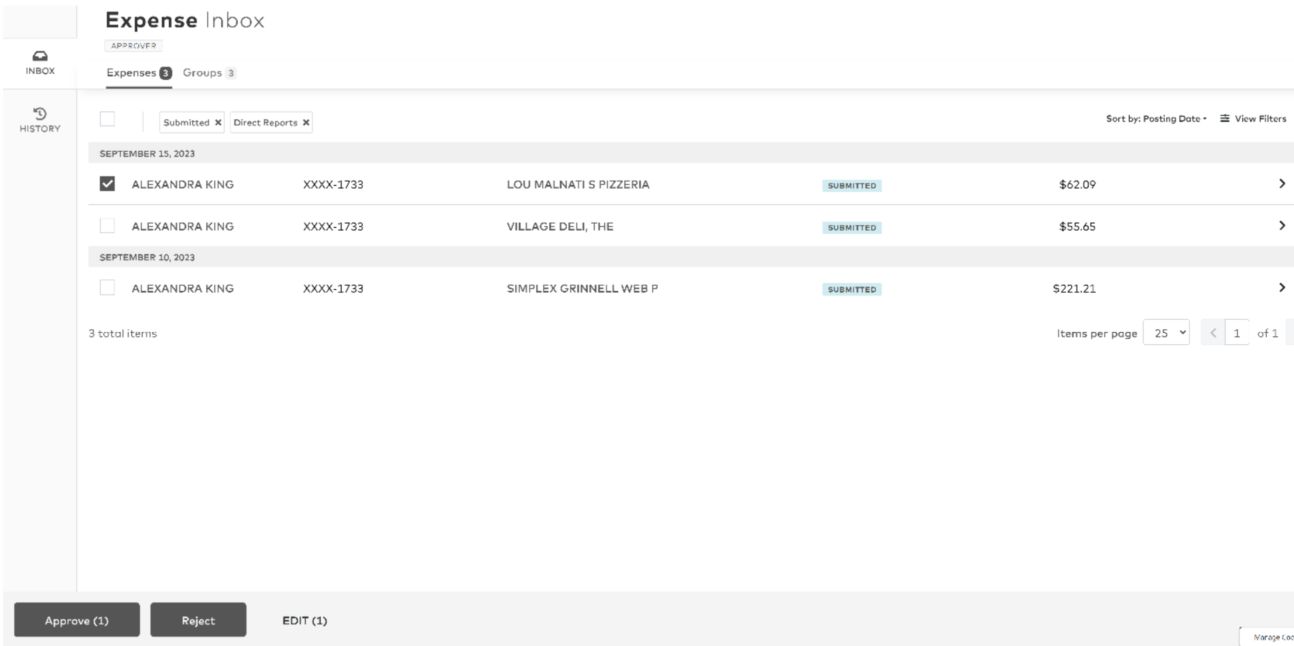


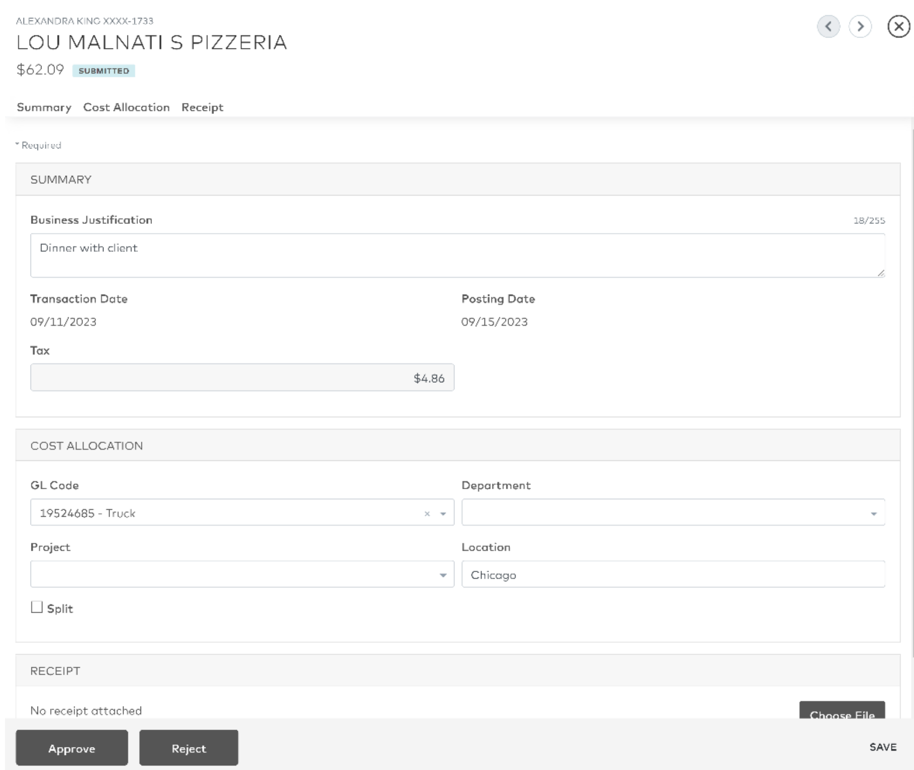
</td></tr>
<tr><td>2</td><td>Your Expense Inbox will display all the transactions you need to approve. If you are an approver for multiple cardholders, you will see all their expenses here. If you want to view just one cardholder at a time, or for a specific date range, you can use the filter option on the right.

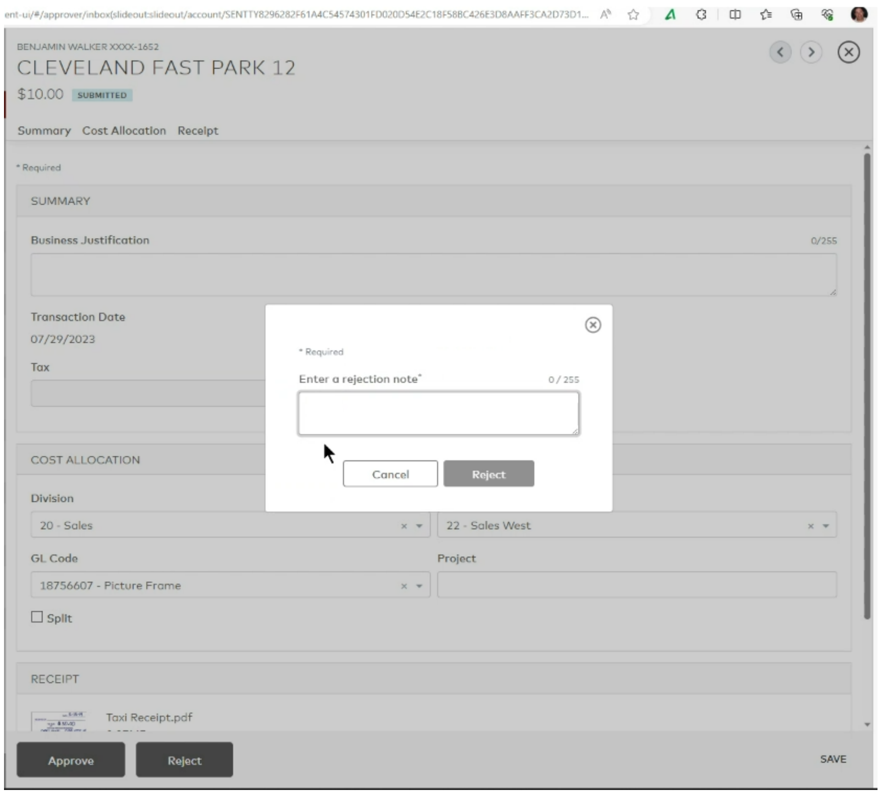


</td></tr>
</table>

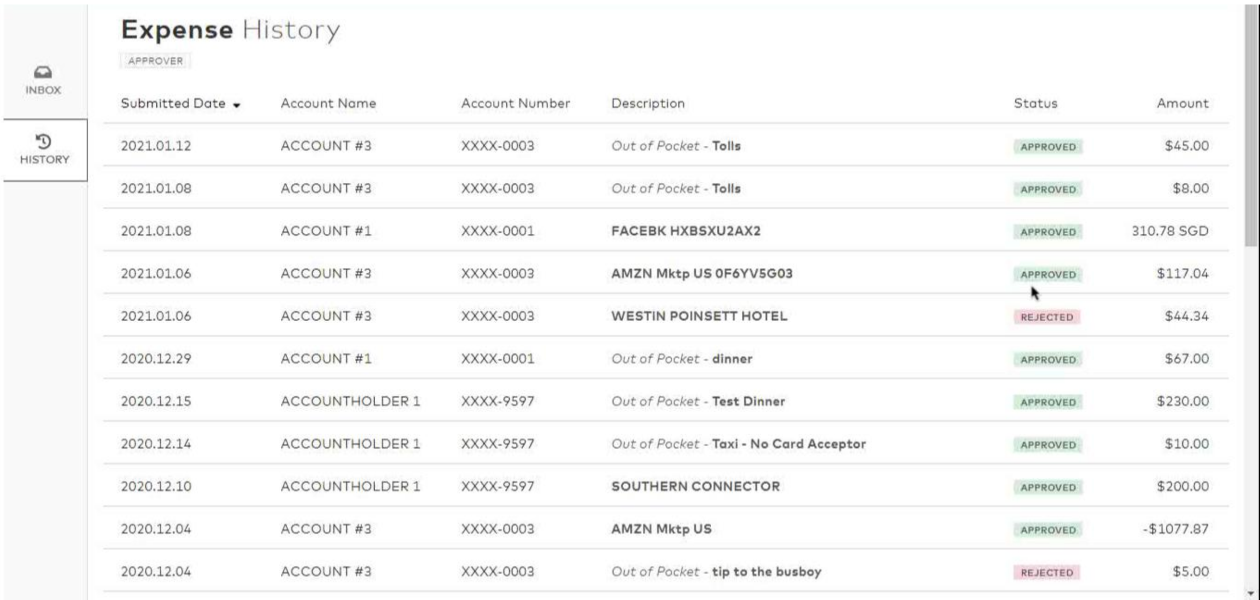
<table>
<tr><th></th><th>Action/Information</th></tr>
<tr><td>3</td><td>You can approve or reject multiple transactions at once by selecting all the ones you wish to action and clicking the Approve or Reject buttton. Alternatively you can work through each transaction one by one.


</td></tr>
<tr><td>4</td><td>To work through each transaction, click on the transaction to open the details. Review and either Approve or Reject the transaction. The system will then open the next transaction to review.


</td></tr>
</table>

	Action/Information
5	If you reject a transaction, you will need to enter a rejection note. Once you click **Reject**, the transaction will be routed back to the Cardholder's inbox. 

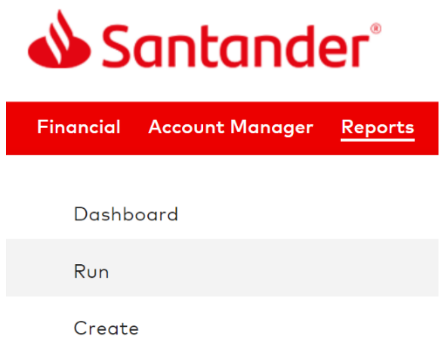
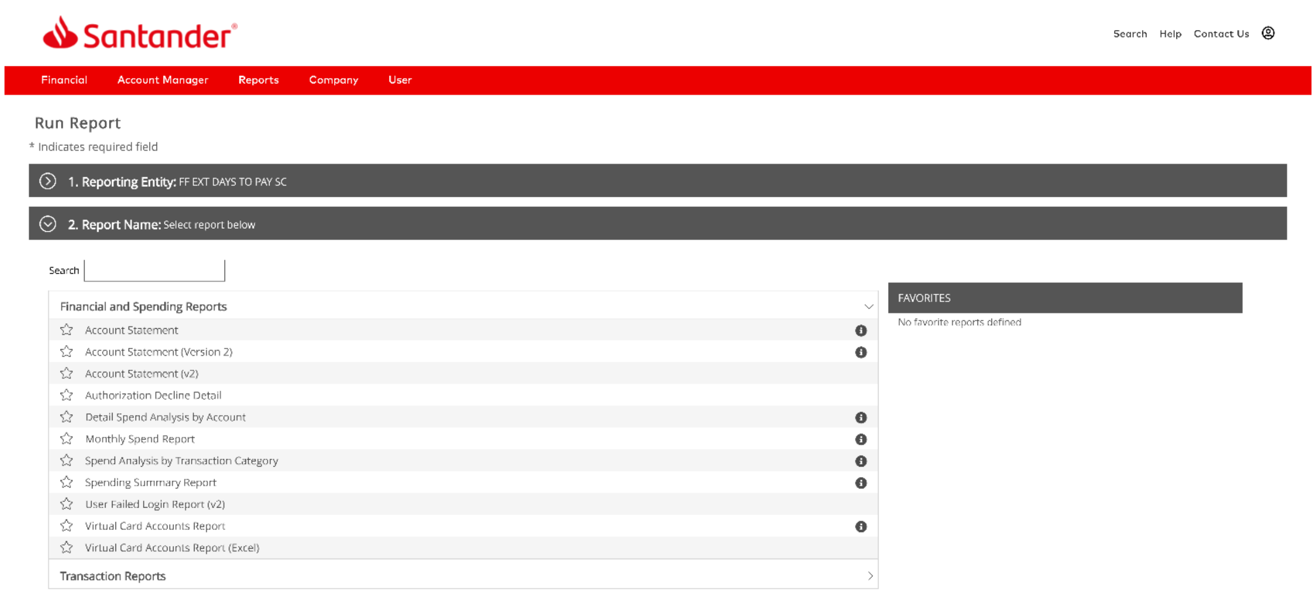
	Action/Information
6	Once you approve or reject a transaction it will be removed from your Inbox. You can see historical transactions in the History tab.

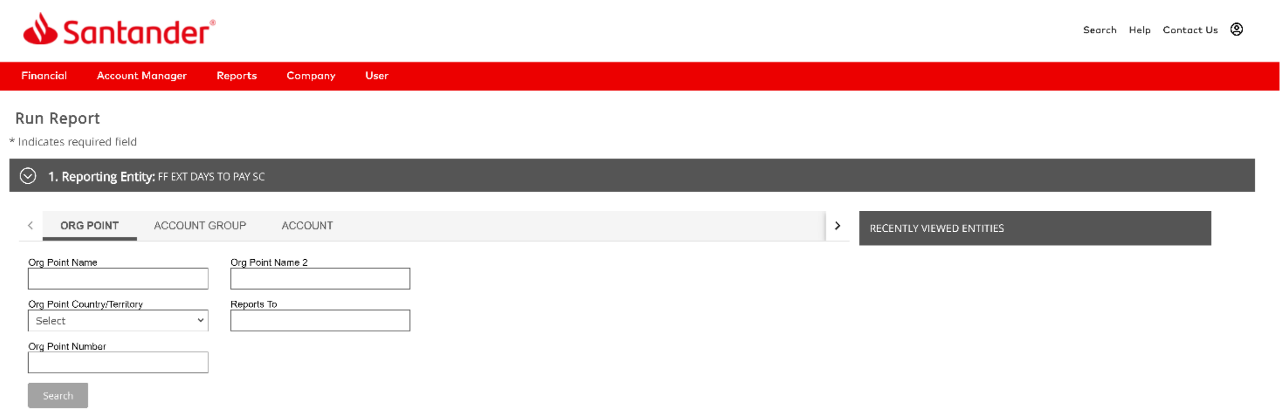


Submitted Date	Account Name	Account Number	Description	Status	Amount
2021.01.12	ACCOUNT #3	XXXX-0003	*Out of Pocket* - **Tolls**	APPROVED	$45.00
2021.01.08	ACCOUNT #3	XXXX-0003	*Out of Pocket* - **Tolls**	APPROVED	$8.00
2021.01.08	ACCOUNT #1	XXXX-0001	**FACEBK HXBSXU2AX2**	APPROVED	310.78 SGD
2021.01.06	ACCOUNT #3	XXXX-0003	**AMZN Mktp US 0F6YV5G03**	APPROVED	$117.04
2021.01.06	ACCOUNT #3	XXXX-0003	**WESTIN POINSETT HOTEL**	REJECTED	$44.34
2020.12.29	ACCOUNT #1	XXXX-0001	*Out of Pocket* - **dinner**	APPROVED	$67.00
2020.12.15	ACCOUNTHOLDER 1	XXXX-9597	*Out of Pocket* - **Test Dinner**	APPROVED	$230.00
2020.12.14	ACCOUNTHOLDER 1	XXXX-9597	*Out of Pocket* - **Taxi - No Card Acceptor**	APPROVED	$10.00
2020.12.10	ACCOUNTHOLDER 1	XXXX-9597	**SOUTHERN CONNECTOR**	APPROVED	$200.00
2020.12.04	ACCOUNT #3	XXXX-0003	**AMZN Mktp US**	APPROVED	-$1077.87
2020.12.04	ACCOUNT #3	XXXX-0003	*Out of Pocket* - **tip to the busboy**	REJECTED	$5.00

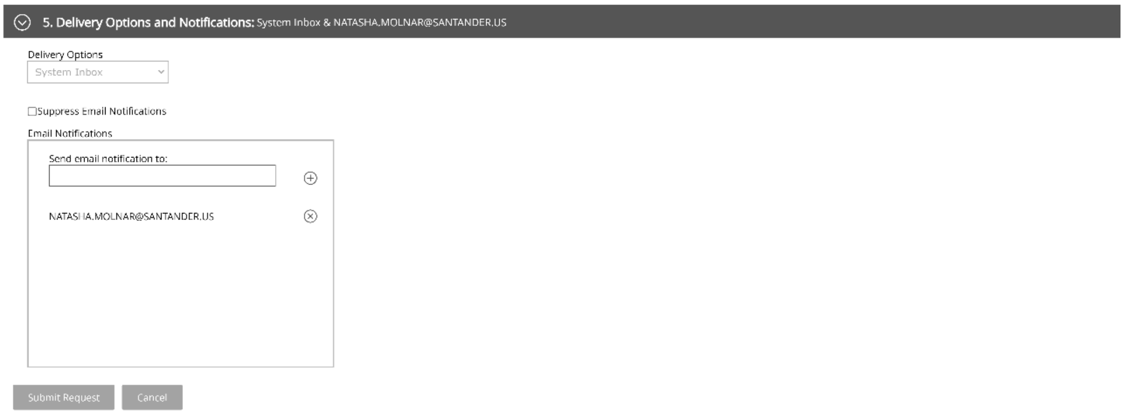
3 Reports

Reports are available in the Reports module.

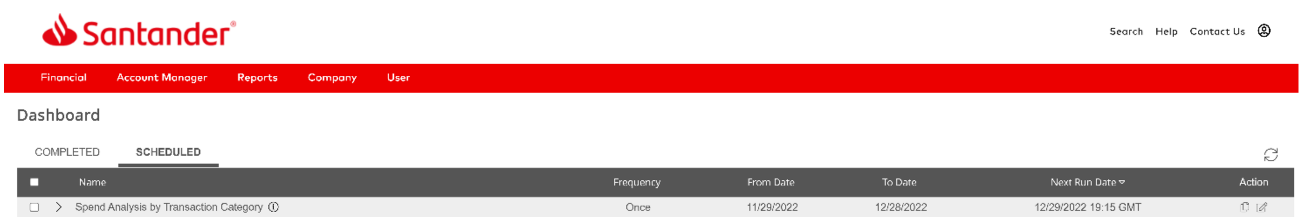
<table>
<tr><th></th><th>Action/Information</th></tr>
<tr><td>1</td><td>To run a report, choose the Reports menu and select the Run option.

</td></tr>
<tr><td>2</td><td>Choose the report you want to run.

</td></tr>
</table>

	Action/Information
3	You can now edit any of the following parameters by clicking on the arrow next to the feature. If you do not want the report for the whole company you can specify the Org Point or Account under **1.Reporting Entity.** 
4	You can set the date range and report frequency under **4.Frequency.** Please note that if you choose today's date, the report will be scheduled to run at midnight. You may wish to Schedule Offset days so that you catch all transactions in your timeframe, even if they are posted a day or two later. Transactions are available for reports for three years. 

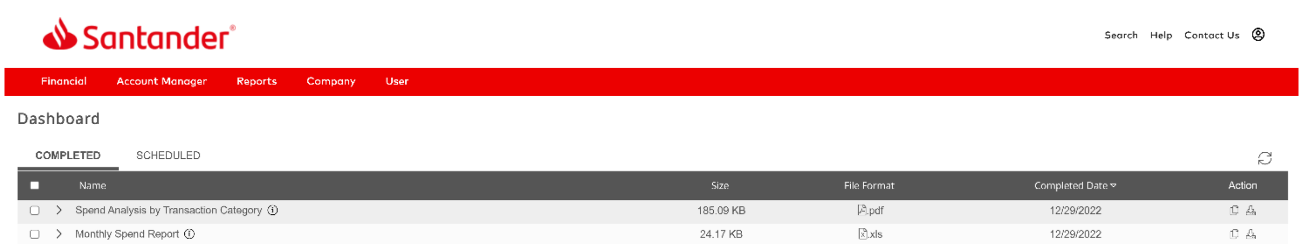
<table>
<tr><th></th><th>Action/Information</th></tr>
<tr><td>5</td><td>You can choose to have an email notification when the report is ready under 5. Delivery Options and Notifications. Click Submit Request.



</td></tr>
<tr><td>6</td><td>You will get a confirmation message and the Dashboard will open showing the report under Scheduled.



</td></tr>
<tr><td>7</td><td>When reports are ready, they will appear on the Dashboard under Completed. You can download these by clicking on the Download icon on the left.



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