



Using Quick Links

The Welcome screen, in the Items Awaiting Your Action panel, has links that take you directly to a task, if applicable.

Managing Welcome Greetings

You can add, change, or delete user greetings that display on the PaymentNet Welcome screen.

Note: User greetings are shown on the Welcome screen for a specific role or hierarchy ID. The greetings can be customized to display for specific roles or hierarchy IDs. The message displays under Message From Program Administrator until the greeting changes, is deleted, or expires.

1. Select **Administration > Hierarchy > Settings > Greeting** to add, change or delete user greetings.
2. Next to the Hierarchy ID field, click the **Hierarchy ID** link and select a hierarchy from the pop-up window. The new hierarchy ID displays in the Hierarchy ID field. The hierarchy description displays next to the Hierarchy ID.
3. Check **Override Inheritance** to allow the Greeting field to be edited. Override Inheritance is used to explicitly change the settings for the current Hierarchy ID and reset values within the hierarchy.
4. Enter the **Begin Date**, **End Date** and type the desired message to the users.

5. Select the roles for which you want the message to display.
6. Click **Save**.

Note: You may create multiple system greetings with individual begin and end dates, and the messages may be associated with different roles. Greetings are displayed on the Welcome screen.

Creating a New Account

1. Select **Accounts > Manage**. The Account List screen displays.
2. Use an existing account as a template to create the new card account. Do one of the following:
 - Use either the **New Query** or **Advanced Query** functionality to search for a specific account.
 - Select the account by clicking its row on the Account List screen. The Account Detail screen displays.

Note: By creating a card account using an existing account as a template, the new account inherits those account settings. Settings include hierarchy, demographic information, authorization controls, chart of account, and custom fields. You can modify the settings for the new account, if needed. This saves time on data entry and promotes standardized card configuration.

3. Click the **Create New Account** button.
4. Select **New Employee**.
5. Enter the new or existing **User ID** and **Hierarchy ID**, if applicable. User IDs must be unique.
6. Review and update all remaining fields for the new account. Items marked with an asterisk (*) are required.

7. Click **Continue**. The Account Detail: Controls tab displays.
8. Review and update any of the limits, MCC Groups or other fields.
9. Click **Continue**. The Account Detail: MCC Group Controls tab displays.
10. Review and update authorization limits for specific MCC Groups, if desired. A new MCC Group can be added to the new card by clicking the **Plus (+)** button.
11. Click **Save**. The account number is assigned immediately and is in Pending status. The account number is valid and usable when the status changes to New. When a cardholder activates the card, the status changes to Active.

Managing Account Status

1. Select **Accounts > Manage**. The Account List screen displays.
2. Select the account you want to modify. The Account Detail: General Information tab displays.
3. Select the desired status of **Active**, **Closed**, **Lost** or **Stolen**, or **Suspended** from the list.
4. Complete other fields, if required.
5. Click **Save**.

Note: If the card is marked as Lost/Stolen, J.P. Morgan automatically ships you a new card. You do not have to click Replace Card.

Managing Account Limits

1. Select **Accounts > Manage**. The Account List screen displays.
2. Select the account you want to modify. The Account Detail: General Information tab displays.

- Click the **Controls** tab to review or set the authorization control limits for the account. The most common limits include:
 - Credit Limit:** Maximum amount available for the account during a cycle.
 - Single Amount Limit:** Maximum amount available for a single transaction.
- Click **Save**.

Managing MCC Groups

- Select **Accounts > Manage**. The Account List screen displays.
- Select the account you want to modify. The Account Detail: General Information tab displays.
- Click the **MCC Group Controls** tab to review or manage the MCC Groups associated to the account. MCC Groups are controls that manage the type of merchants the account is authorized to use or the type of merchants where the account will be declined.
- Click **Save**.

Issuing a Replacement Card

Only issue a new card if the existing card no longer works. For example, if the card is physically damaged. Issuing a replacement card does not create a new account or an account number. Do not use these steps for Lost or Stolen accounts. For lost or stolen cards, use the above steps in the Managing Card Status section.


- Select **Accounts > Manage**. The Account List screen displays.
- Select the account you want to modify. The Account Detail: General Information tab displays.

- Click the **Replace Card** button. A replacement plastic credit card with the cardholder's current card information is mailed.

Updating Address and Last Name

- Select **Accounts > Manage**. The Account List screen displays.
- Select the account you want to modify. The Account Detail: General Information tab displays.
- Enter new information in the appropriate fields.
- Click **Save**.

Setting Up Contact Information

You can set up contact information, such as the OPC email and phone number, that users can access by clicking the Contact Information  icon located at the top of the menu bar.

- Select **Administration > Hierarchy > Settings > Contact**. The Hierarchy Settings screen displays.
- Next to the Hierarchy ID field, click the **Hierarchy ID** link and select a hierarchy from the pop-up window. The hierarchy ID displays in the Hierarchy ID field. The hierarchy description displays next to the Hierarchy ID.
- Check **Override Inheritance** to allow the contact information fields to be edited.
- Select the type of contact you want to add from the **Contact Type** drop-down list. Click the **Add Contact** button.

- Complete the required fields, and other fields, for the contact information.

Note: You can flag individuals with a certain title (e.g., AO) to allow for easy searching.

- Click **Save**.

Obtaining Additional Support

For site-related questions, or questions about your card account, please contact your J.P. Morgan program coordinator.

For assistance after hours, holidays, and weekends, contact J.P. Morgan Customer Service at 1-888-297-0781. Provide your agency name, role, and purpose of your call.