PaymentNet – Cardholder Guide (UNR)

Purchasing Card Program – PaymentNet

Logging into PaymentNet

1.) Open your Microsoft Explorer or Netscape Navigator internet program.
2.) Enter the following internet address into the address bar:
   https://www.paymentnet.jpmorgan.com
3.) Enter the following on the PaymentNet Login Screen:
   a. Organization ID: UNR0001
   b. User ID: (use the user id that was assign to your card)
   c. Password: (Enter the Password given to you by the administrator)
4.) Click on the “Log In” icon
5.) The system will require you to change your “password” the first time you log into PaymentNet.
6.) Enter your new “password”. Has to be at least 8 characters long (Alpha & numeric).
7.) Confirm your new “password”. This password is good for 90 days.
8.) Click the “Save” button.

NOTE – All session will automatically “time out”
After 15 minutes of inactivity.
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Changing “Password”

1. Go to the menu bar on the home page.
2. Select “My Profile” (second icon button from right)
3. Click on “Change Password” in the General Information section.
4. Enter your old “password”.
5. Enter your new “password”.
6. Confirm your new “password”.
7. Click the “Save” button.
8. The new “Password” will take effect upon your next login.

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Logging Out

You should log out each time you finish using PaymentNet. Logging out ensures your identity cannot be used without your permission after you leave your computer.

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**Note:** PaymentNet automatically logs you out after 15 minutes of inactivity. After 12 minutes of inactivity, PaymentNet displays a message warning that your session is about to expire and any unsaved work will be lost. If you do not respond to the warning message, you will be automatically logged out three minutes later. PaymentNet automatically logs you out after eight hours of continuous use. A warning message also appears after eight hours of continuous use. You will then be redirected to the Log In screen. You must log in again to resume activity, which includes completing any updates that were not saved.

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To log out:

1. Click the **Log Out** button. The **Log Out** button is located on the toolbar in the upper right-hand corner of the screen. 

*PaymentNet logs you out of the system.*

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Menu Bar

The menu bar, located across the top of the screen, lists the primary PaymentNet modules you are authorized to access.

Each menu option includes a set of sub-functions you can perform. Menu sub-functions are accessed by moving your cursor over each primary menu option.

Menu Bar

A. **Home**. Click this tab to view the Welcome screen. This screen lists any items that require your attention.

B. **Transactions**. From this menu, you can view, review, approve, and dispute a transaction. For more information, see [Transactions](#).

C. **Orders**. From this menu, you can view itemized information for a specific Single-Use Account order, as well as create and reconcile your Single-Use Account orders. For more information, see [Single-Use Account Orders](#).

D. **Reports**. From this menu, you can view, create, schedule, download, and delete reports. For more information, see [Reports](#).

E. **Accounts**. From this menu, you can view card account detail, create a new card account, issue a new card account, change card account status, and manage card account spend and Merchant Category Code Groups (MCCGs) limits. For more information, see [Card Accounts](#).

F. **Employees**. From this menu, you can view the user account profile, add a new user account, change user account information, assign or change user access roles, and unlock or change a user account password. For more information, [Employees](#).

G. **Payments**. From this menu, you can view payment history, set up bank information, as well as make, schedule or cancel a payment. For more information, see [Statements and Payments](#).

H. **Administration**. From this menu, you can manage and set up organization hierarchy, chart of accounts, cycle, imports, mappers/exports, custom fields, customer code, reports, roles, and merchant defaults. For more information, see [Administration Settings](#).

I. **Help**. From this menu, you can quickly and conveniently access online information and step-by-step instructions on using PaymentNet. For more information, see [PaymentNet Help](#).

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Viewing Transactions

1. Go to the menu bar on the home page.
2. Select Transactions.
3. Select Manage.
4. This will take you to the Transactions List Page.
5. This screen will display all transactions that you have authority to review/update.
6. Extra details may be available on each transaction. If icons are displayed in the “Trans ID” column, then extra details is available.

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Reviewing Transactions

1. Go to the menu bar on the home page.
2. Select Transactions.
3. Select Manage.
4. This will take you to the Transactions List Page.
5. This screen will display all transactions that you have authority to review/update.
6. Click on a transaction or update the Accounting Code field and hit the “Save” button.
7. Compare the transaction details to your supporting documentation (i.e. receipts)
8. Review the Transaction Defaults “Accounting Codes” allocations and make any necessary changes.

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10. Click the “Save” button.
11. Click the “List” button to return to the Transaction List page.

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Splitting Transactions

1. Go to the menu bar on the home page.
2. Select Transactions.
3. Select Manage.
4. This will take you to the Transactions List Page.
5. This screen will display all transactions that you have authority to review/update.
6. Click on the transaction that you want to split.
Click on the “Add Lines” button.

Splitting Transactions – Continued

7. A “Confirmation” Box will appear. Please enter how many lines you would like to add. For Example - A single split of the original transaction will take 2 lines. This will split the original dollar transaction amount into 2 equal (50%) amounts.

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Splitting Transactions – Continued

8. Go to the bottom of the screen and open up the two lines by clicking on the triangle located on the left hand side on the “Item” column.

9. Make the necessary changes to the Accounting codes fields or dollar amounts.
10. If needed, add information to the “Transaction Notes” field.
11. Click the “Save” button.
12. Click the “List” button to return to the Transaction List page.

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Disputing Transactions

1. **Before you dispute a transaction, you MUST first attempt to resolve the issue directly with the merchant.**
2. Go to the menu bar on the home page.
3. Select Transactions.
4. Select Manage.
5. This will take you to the Transactions List Page.
6. This screen will display all transactions that you have authority to review/update.
7. Click on the transaction you want to dispute.
8. Compare the transaction details to your supporting documentation (i.e. receipts)

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9. Click the “Dispute” button.

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Disputing Transactions -continued

10. Select a “Dispute Reason” from the drop-down list. Depending on the selection some additional information may be requested.
11. Confirm your E-mail address and enter the Merchant State, if requested.

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Disputing Transactions -continued

12. Enter any additional information if required.
13. Click the “Submit” button.
14. Track the status of the disputed transaction online from the Transaction List.

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Statement of Account Report-Automatic

1. Go to the menu bar on the home page.
2. Select “My Profile” icon.

3. Put a check in the box labeled, “Enable E-mail notification for: __Reports”
4. Verify the e-mail address and click the “Save” button.

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Statement of Account Report - Continued

5. Go to the menu bar on the home page.
6. Select “Reports” and then “Create”.

7. Select, “UNR0-Statement of Account-PDF Version”.

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Statement of Account Report - Continued

8. Rename the report with “your name” -- Open the “Criteria” fields by clicking on the + box located on the right side of the screen.
9. In the “Field” box, select “Posting Date”.
10. In the “Operation” box, select “Is Relative”.
11. In the “Value” box, select “Prior Period” and “Statement Cycle”
12. Go up to the “*Name” field and after the “Statement of Account” put a space and then type your name.
13. Click the “Save” button.
14. Click on the button that says, “Schedule to run automatically?”
15. Click on the box next the “Schedule to Run Automatically”
16. In the “Frequency” drop down box, select, “Cycle”
17. In the “Cycle” drop down box, select, “Statement Cycle”.
18. Click on the button for “First Day of Current Period”

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Once the “Statement of Account” Report has run.
1. An e-mail will be sent notifying you that your report is ready to be retrieved.
2. Log into PaymentNet.
3. Located the “Items Awaiting Your Actions” section on the home page or “Reports” then, “Download”.

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4. When the Status changes to “Successful” -- Click on the report named, “Your Name.zip” to view the Statement of Account report. You will see a statement that says if you want to “open” in a zip file. Click on “open” to view the report.

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Statement of Account Report – Individual Selection Criteria
1. Open up the “Criteria” selection by clicking on the “+” button.
2. Select the criteria you wish to report on. For example – All Transactions for March 1-15th for cardholder, Damke. (See Below)
3. Hit the “+” button to add additional lines of criteria or click on the trashcan to delete a line.
4. In the “Field” box, select “Posting Date”.
5. In the “Operation” box, select “Is Between”.
6. In the “Value” box, select the date range for the report. For example, 03/01/2016 and 03/15/2016.
7. Enter a second criteria line for cardholder is equal to “Damke”.
8. Hit the “Process Report” button.

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On-line Training – Learning Modules

1. Log into PaymentNet System.
2. Go to the menu bar on the home page and select “Help”

3. Select one of the following modules:
   a. Reviewing a Transaction
   b. Splitting a Transaction
   c. Disputing a Transaction
   d. Running Queries
   e. Running Reports

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Support

JP MorganChase – Cardholder Support Team, 1-800-270-7760 or 1-800-316-6056. 24 hours.

Assistance with:
- Reporting Lost/Stolen Cards
- Balance Inquiry
- Disputes
- Fraud Inquiry
- Declined Cards

PaymentNet Support:
JP MorganChase – 1-877-967-1100, Option 1

Fax Number for JP MorganChase – 1-801-590-1316

UNR Purchasing Card (PCard) Support Team:

If you have any questions related to your purchasing card(s), we have three UNR Pcard auditors responsible for the following agencies:

Elaine Casey (784-4171, ecasey@unr.edu): Agencies 102 - 113, 130-136, 140 - 142, 401 - 405
Marilyn Fry (784-4160, fry@unr.edu): Agencies 101, 116, 117, 119, 125, 150 and 151
Diane Morgan (784-1059, demorgan@unr.edu): Agencies 114 - 115, 117, 120, 121 122, 123, 125, 152 and 153

Joyce Stauffenberg (775-784-1203, sjoyce@unr.edu): UNR Manager of AP/Pcard/Travel

PCard Department Fax Number: 775-327-5844

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