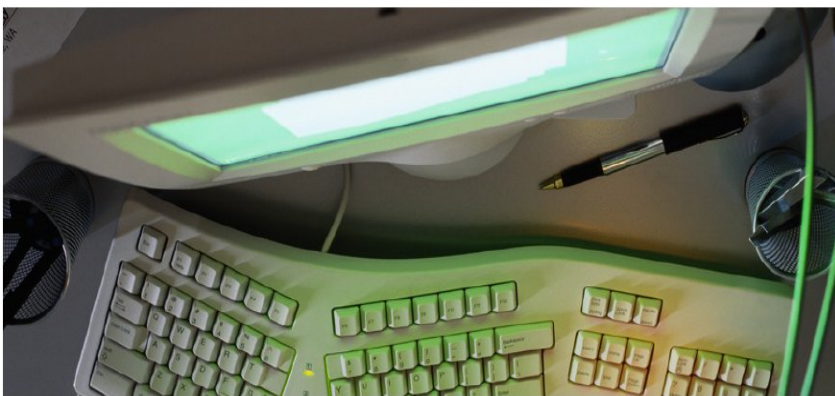


Visa IntelliLink Spend Management

Setting Up Cardholder Users with Multiple Card Accounts



Primary Cardholder User

Multiple card accounts can be mapped to the same Cardholder user, as long as the card account has not already been mapped to another user.

To map card accounts to a user that is already set up in IntelliLink:

- 1 Click Administration located in the left menu, then click Account Management. The Account Search screen appears.
- 2 Type the cardholder's last name in the Last Name field.
- 3 Select "Account Listing" shown at the bottom left.
- 4 Click Search.

A screenshot of the Visa IntelliLink Account Search web application. The browser title is "Visa IntelliLink Spend Management - Microsoft Internet Explorer provided by PNC". The URL is "https://intellink.spendmanagement.visa.com/reports/report2_1515c.asp". The page has a blue header with the "VISA Account Search" logo. On the right, there are options for "Report mode: Employee" (unchecked), "Account" (checked), and a "Close" button. The main content area is divided into several sections: "Account Number (Last 4 Digits)" with an input field; "Account Issuer" with a dropdown menu set to "PNC Bank 1940"; "Account Type" with a dropdown menu set to "[All Types]"; "Account Status" with a dropdown menu; "Hierarchy Node" with a dropdown menu set to "[All]"; "First Name" and "Last Name" input fields, with "Lutz" entered in the last name field; "Export File Name" and "Export File Type" input fields; "Result View" with radio buttons for "Summary - Issuer" (checked), "Summary - Hierarchy Node", "Account Listing", and "Employee Setup Assistant"; "Grouping Restriction" with checkboxes for "Unmapped Details" and "Selected Node Only"; and "Account Details" with checkboxes for "Account Mapping" (checked) and "Account Activity" (checked), each with sub-options for "All accounts", "Mapped accounts only", "Unmapped accounts only", "Used accounts only", and "Unused accounts only". There are also expandable sections for "Account Date Ranges", "Account Limits", "Additional Fields", and "Report Templates". At the bottom, there is a "Search" button with a magnifying glass icon and a mouse cursor pointing to it.

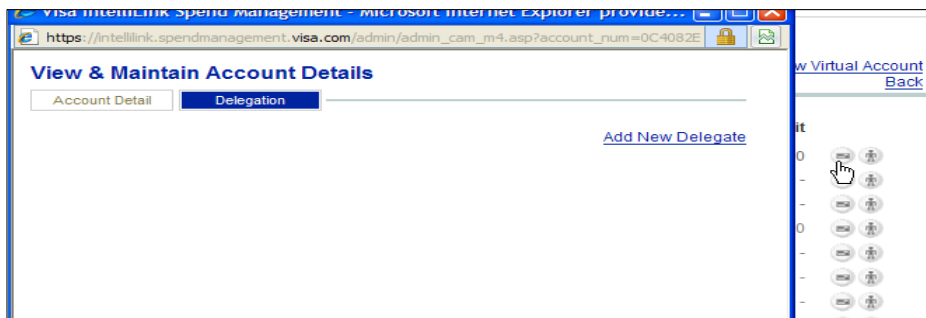
- 5 Click the stick figure icon located next to the card account to be mapped. The Employee Search screen opens.
- 6 Search for the employee that will be mapped to this card account.
- 7 Click the stick figure icon located next to the employee record to map the card account to the employee user.
- 8 Repeat steps 5-7 for all card accounts that will be assigned to this user.

Delegate Card Accounts

If the same card account needs to be assigned to multiple Cardholder users, map the card account to one Primary Cardholder User, then delegate that card account to the other Cardholder users.

To delegate a card account that is already mapped to a Primary Cardholder to additional users in IntelliLink:

- 1 Click Administration located in the left menu, then click Account Management. The Account Search screen appears.
- 2 Enter search parameters for the card account that will be delegated, or leave blank.
- 3 Select "Account Listing" shown at the bottom left.
- 4 Click Search.
- 5 Click the credit card icon located next to the card account that will be delegated. The View & Maintain Account Details screen opens.
- 6 Click the Delegation button.



- 7 Click the Add New Delegate link.
- 8 Search for the employee that will be delegated to this card account.
- 9 Click the stick figure icon next to the employee record to delegate the card account to the employee user.
- 10 Close the Employee Search window. The Cardholder User is now delegated to this card account.

Assign Card Accounts Through Hierarchy

If a Cardholder User needs access to all card accounts within a Hierarchy Node, the Cardholder User may be mapped to the Account Hierarchy, rather than to the card accounts individually.

To map a user to Account Hierarchy in IntelliLink:

- 1 Check if the user has the correct access rights. Click Administration located in the left menu. The Administration Overview screen appears.




- 2 Click Employees. The Employee Search screen appears.
- 3 Type the user’s last name in the Last Name field and click Search.
- 4 Click the stick figure icon located next to the user being mapped. The Personal Details Report screen appears.
- 5 Click on Access Rights on the left-hand side of the Personal Details Report screen.
- 6

If...	Then...
“User Right – Editable Reports” checkbox is NOT checked	Click the checkbox and close the window.
“User Right – Editable Reports” checkbox is checked	Make no changes and close the window.

- 7 Click the circle button (the blank icon) located to the right of the employee to place a checkmark in the “Select Employee” icon.

Access Level	Last Login
Administrator	-
Administrator	-
Administrator	2012-08-22 07:48:53
Administrator	-
Administrator	-
Customer Support	2012-08-23 11:21:35

- 8 Click the “Perform Group Action” button (gray checkmark) at the bottom of the employee list.
- 9 Choose “Add to Report Group” as the Action to Perform and “Administrator Reports” as the Group
- 10 Click “Save.” The user now has access to the “Transaction Search – Company” Report, which is part of the default group “Administrator Reports.”
- 11 Click Module – Account Hierarchy, under the Instance Management heading, in the left-hand menu to map the Account Hierarchy to the user.
- 12 Click the hierarchy node that will be mapped to this user. The Account Hierarchy window appears.
- 13 Click the Reporting Employees button.
- 14 Click the Add Employee link.
- 15 Search for the employee user that will be mapped to this hierarchy node.

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- 16 Click the Selected Node button to map only the selected hierarchy node to the employee, or click the Recursive Nodes button to map the selected hierarchy node plus all children nodes to the employee.
 - 17 Click Save.
 - 18 The employee user is now listed as a Reporting Employee for this hierarchy node.



For further assistance, refer to your **Contact Matrix**.