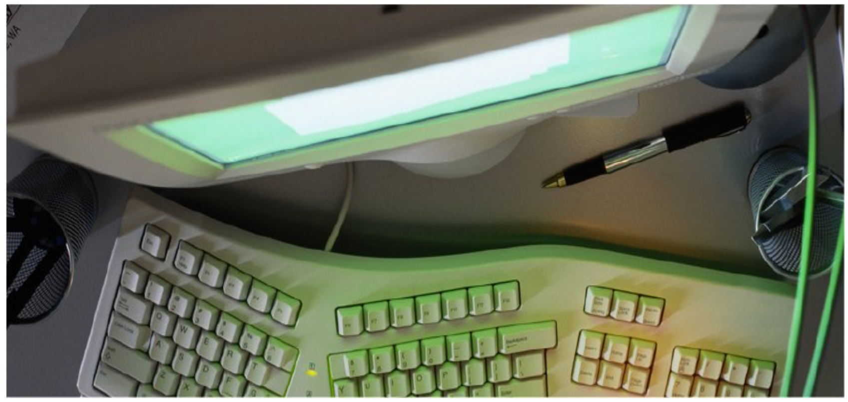
Visa IntelliLink Spend Management

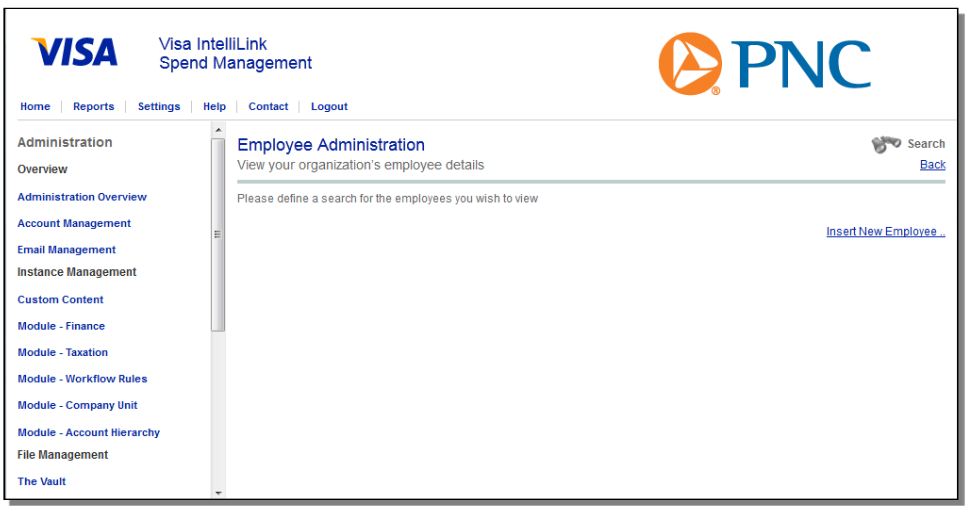
Setting Up a New User [Expense Management Cardholder]



1 Click Administration located in the left menu. The Administration Overview screen is shown.

2 Click the Employees button located in the Administration Overview screen. The Employee Search screen appears.

3 Close the Employee Search screen. The Employee Administration screen is shown.



4 Click the Insert New Employee link located to the right of the Employee Administration screen. The Insert Personal Details screen opens.

5 Enter the Employee ID, First Name, Last Name, and Email Address in the appropriate fields.

6 Click the Create Cash Card checkbox to remove the check if the employee will not be creating out of pocket expenses; otherwise, leave it checked so that the employee can create out of pocket expenses.

7 Click the Group and Role Membership drop-down shown on the right. The Group and Role Membership section opens.

8 Click the Charge Group drop-down menu. The Charge Group menu is shown.

9 Select the appropriate Charge Group, typically “All Codes”.

10 Click the Report Group drop-down menu. The Report Group menu is shown.

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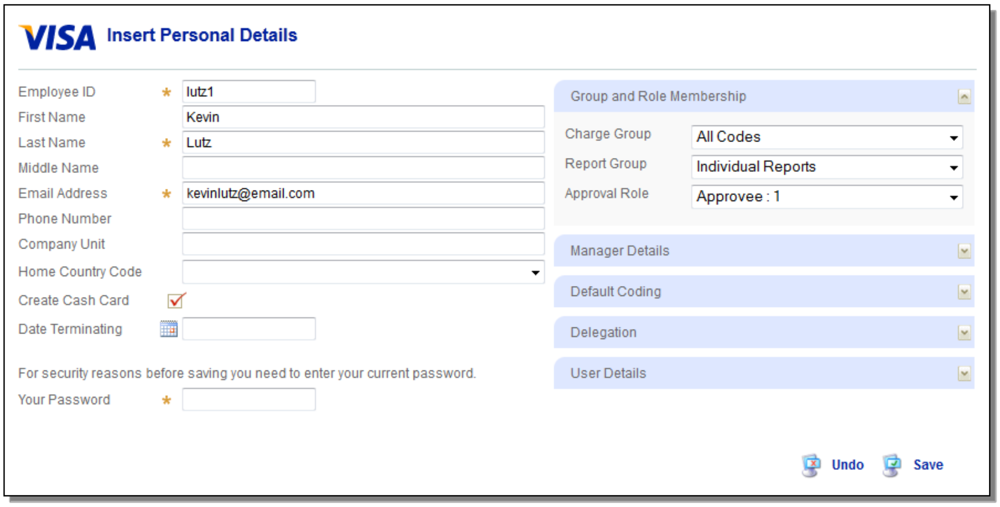
11 Select the appropriate Report Group, typically “Individual Reports”.

12 Click the Approval Role drop-down menu. The Approval Role Drop-down menu is shown.

13 Select “Approvee : 1”.



14 If your organization is using manager approval, click the Manager Details drop-down section and choose the Manager Level 1 for the employee being created.

15 Click the Default Coding drop-down section.

If…	Then…
The employee will require a default allocation code set-up for all transactions	Set-up the allocation code in the Default Coding drop-down
The employee will NOT require a default allocation code set-up for all transactions	Don’t set up the allocation code in the Default Coding drop-down

16 Click the User Details drop-down section. The User Details section is shown.

17 Create a unique Username for the employee. Typically, the email address for the employee is used as a unique Username.

18 Click Save. The employee record is saved.

19 Click Account Management located in the left menu. The Account Search screen appears.

20 Search for the card account that you would like to assign to the employee user you just created. Be sure to select “Account Listing” at the bottom left.

21 Click the stick figure icon located next to the card account you would like to map. The Employee Search screen opens.

22 Search for the employee that was created.

23 Click the stick figure icon next to the employee record to map the card account to the employee user.

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24 The new user will receive two emails, shown below, within a few hours. The first email provides the user ID:

Welcome to Visa IntelliLink Spend Management

You have been successfully setup as a new user on Visa IntelliLink Spend Management.
Please find below the username you can use to access this service.

Username: newuserpnc

Please click here to sign into Visa IntelliLink Spend Management

The second email provides the password which is randomly generated by IntelliLink:

Welcome to Visa IntelliLink Spend Management

You have been successfully setup as a new user on Visa IntelliLink Spend Management.
Please find below the password you can use to access this service.

Password: 3LHS12#jl

Please click here to sign into Visa IntelliLink Spend Management

For further assistance, refer to your Contact Matrix.

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