

# Visa IntelliLink Spend Management

## QuickCoding Tip Card



### QuickCoding

The QuickCode function enables you to code transactions directly via the Account Statement screen and code multiple transactions to the same charge codes. This setting is not visible if your company chose not to enable this function for its users. If QuickCoding is enabled for your company, you can add the QuickCoding panel to your personal view by selecting **QuickCoding – Line Item**.

To enable QuickCoding:

- 1 From the Home Page, select **Settings**.
- 2 From the Settings screen, select **Customize Views**.
- 3 Select the checkbox for QuickCoding and click **Save**.
- 4 Now, Account Statements permits the ability to code multiple transactions simultaneously.

Exhibit 1.1 Where the QuickCoding Option can be found:

Personal Settings

The following diagram map is aimed to help you configure and manage your own personal settings. If you have any questions or wish to change settings not available here then please contact your system administrator.

Charge Groups | Charge Codes  
Report Groups | Reports  
Approval Roles | Approval Rules

Personal Details  
Account Management  
Management Codes  
Default Codes  
Approval Delegation  
**Customize Views**  
Audit History  
Regional Settings  
Security

Statement - Fields & Sort Order

Transaction Date	<input checked="" type="checkbox"/>
Posting Date	<input type="checkbox"/>
Transaction Type	<input type="checkbox"/>
Supplier	<input checked="" type="checkbox"/>
Supplier Order Number	<input type="checkbox"/>
Disputed	<input type="checkbox"/>
Personal	<input type="checkbox"/>
Source Amount	<input type="checkbox"/>
Tax Amount	<input type="checkbox"/>
Issuer Tax Amount	<input type="checkbox"/>
Amount (Tax Exclusive)	<input type="checkbox"/>
Amount (Tax Inclusive)	<input checked="" type="checkbox"/>
Receipt	<input type="checkbox"/>
Enhanced Data	<input type="checkbox"/>
Transaction Coding	<input type="checkbox"/>
Expense Report Name	<input type="checkbox"/>
<b>QuickCoding</b>	<input checked="" type="checkbox"/>
General Settings	<input type="checkbox"/>
No Auto Closing Windows	<input type="checkbox"/>

Save

To make use of the QuickCode function, use the dropdown menus and freeform text fields located at the top of the panel. If you want to code more than one transaction at a time, first change the mode from Single Select to Multiple Select. This is designated by the small plus “+” icon next to the receipt checkbox. Once that is complete, you can select multiple transactions and all of them will be assigned the coding indicated at the top of the page.

Exhibit 1.2 The Statement Screen with QuickCoding enabled. The Selection mode toggle is indicated by the red arrow.

**Account Statement**  
 11/25/2011 to 12/24/2011  
 Emma Bernard - Spring FI - Corporate (0153)

Current Balance 2,299.67  
 Previous Balance 0.00  
 Credit Limit 5,500.00  
 Statement Status Updated

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Narrative Details

GL Code

CC Code

Project

WBS

Receipt

[Save](#)

	Tran Date	Supplier	Amount Incl	
<input type="checkbox"/>	11/30/2011	FedEx.com	17.02	✓ !
<input type="checkbox"/>	11/30/2011	United Airlines	699.34	✓ !
<input type="checkbox"/>	12/01/2011	Starbucks JFK	3.45	?
<input type="checkbox"/>	12/15/2011	ATM Cash Withdrawal	100.00	? !
<input type="checkbox"/>	12/15/2011	Executive Car Services Inc	75.00	? !
<input type="checkbox"/>	12/15/2011	W Hotel New York	1,310.25	? !
<input type="checkbox"/>	12/16/2011	MTA-NYC Transit #00134	25.00	? !
<input type="checkbox"/>	12/16/2011	Pizza Palace	9.62	✓
<input type="checkbox"/>	12/22/2011	Costco	-59.99	? !



For further assistance, click on Contact on the Utility Bar.