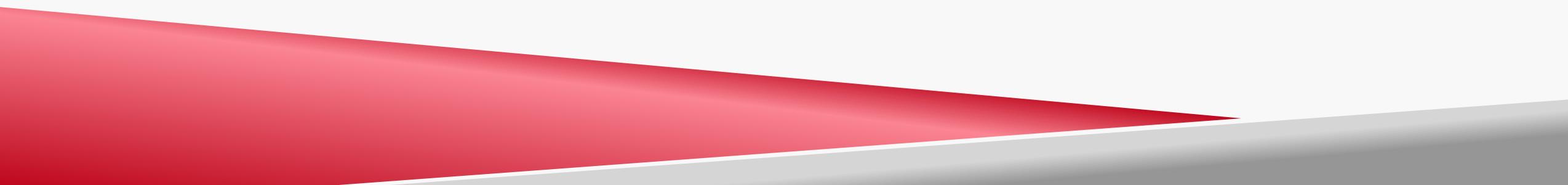




# **Visa IntelliLink P-Card Approval Step-by-Step Guide**

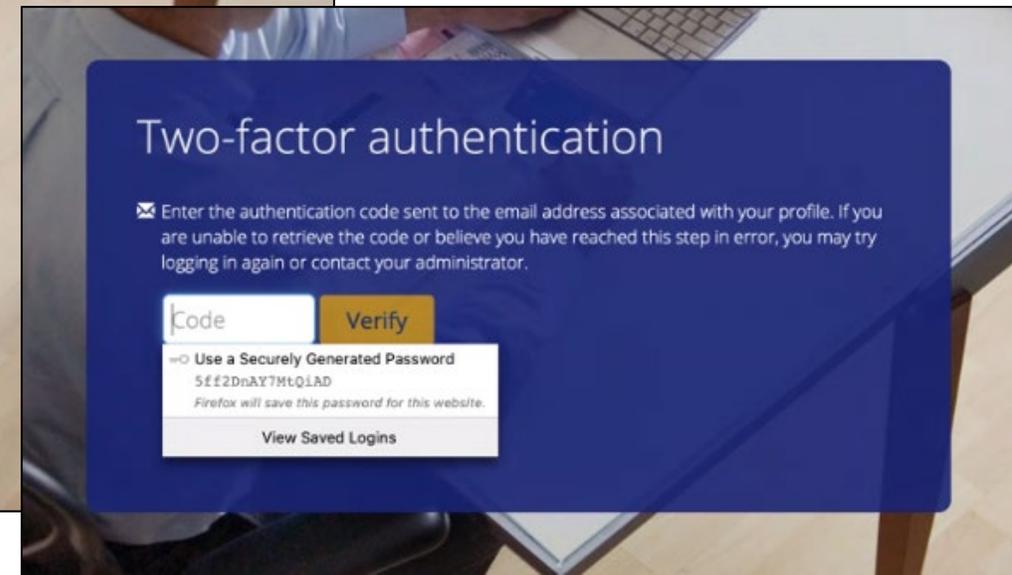
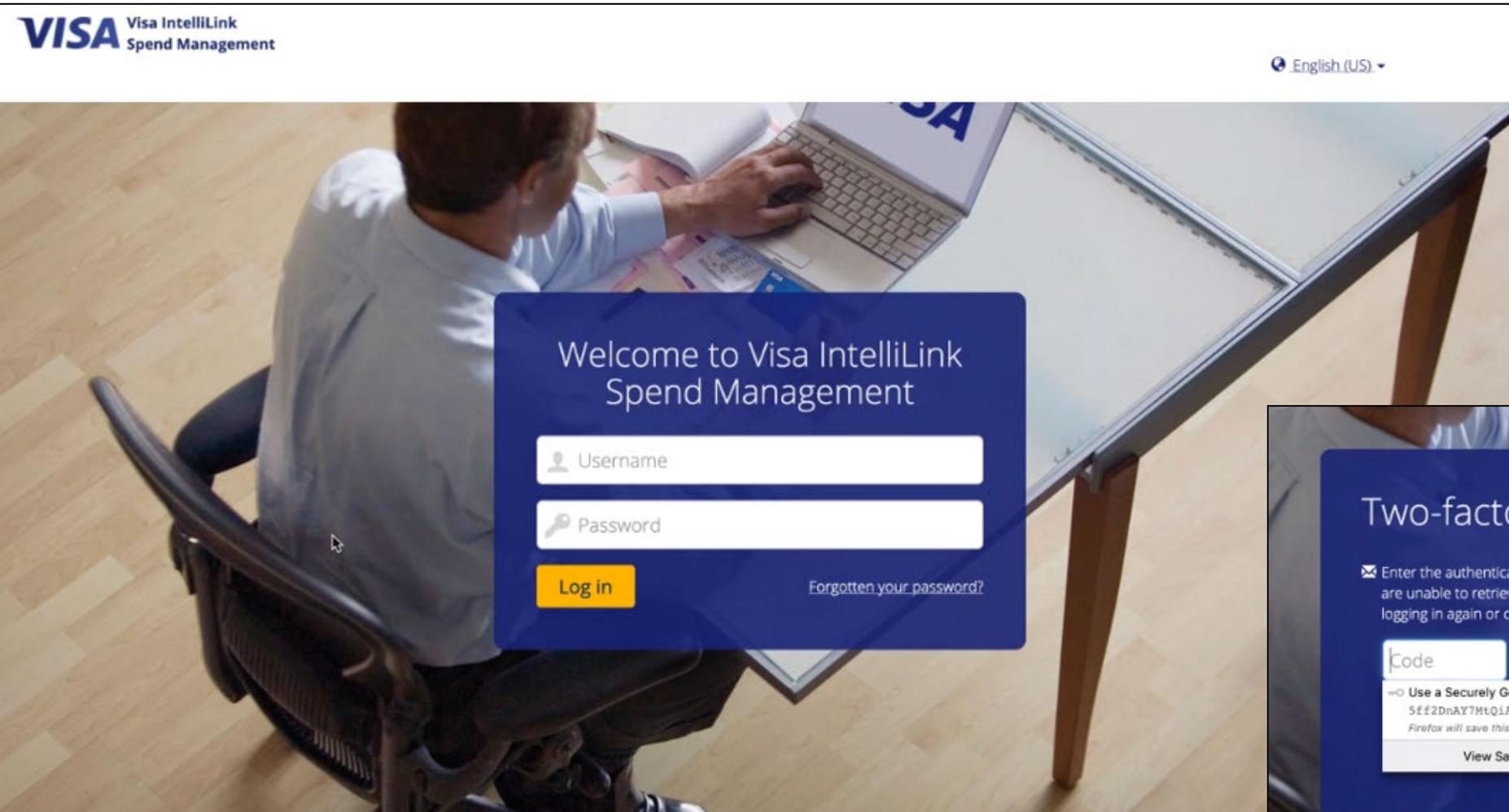
---

March 2021



**Step 1:** Log into **Visa IntelliLink** by going to **intellilink.spendmanagement.visa.com**.

There is a **Two-factor Authentication** process and your authentication code will be emailed to your @iit.edu email address or sent via the **Visa Spend Management App** if you signed up for it.



**Step 2:** Once you log in, you will see the Visa Spend Management's Home Page.

If you are a P-Card holder or proxy/delegate of a P-Card holder, you should see the **Expenses** tab and if you are an Approver, you should see the **Approvals** tab.

 My Actions

 Expense Reports

 Expense Reports

 Report Outbox

 Pinned

To show your favorites here, try pinning items in menus by clicking

MY EXPENSES

 Purchasing Card | \*\*\*\*\_\*\*\*\*\_\*\*\*\*\_XXXX

PNC Bank 1940 | VISA | XXXX

Action Required	Pending Approval	Current Balance (USD)	Available Credit (USD)
0	3	0.00	8,000.00

Recent Periods



**Step 3:** Click on the Approvals tab to review the list of P-Card transactions that are pending your review and approval to complete the reconciliation process.

The automatic setting is for a 12-month timeframe to date so you should be able to see all items pending your approval rather than what is only for the current billing cycle.

Visa IntelliLink Spend Management

Home Administration Accounts Expenses Statements Approvals Reports Show

### Approve Expenses

Filter To do • 03/18/2020 to 03/18/2021

Find

Reed Kroloff Select all

	Caviar*antique Taco	68.84 USD	PNC 1940 (4199)	12/08/2020	Yes >
	Zoom.Us 888-799-9666	168.94 USD	PNC 1940 (4199)	12/10/2020	Yes >
	U-Haul Moving & Storage O	132.90 USD	PNC 1940 (4199)	12/10/2020	Yes >
	Mailchimp	178.40 USD	PNC 1940 (4199)	12/26/2020	Yes >
	Adobe Acropro Subs	15.93 USD	PNC 1940 (4199)	12/27/2020	Yes >
	Dropbox W7rf552642fs	48.26 USD	PNC 1940 (4199)	12/30/2020	>

If you wish, you can also click on the Filter down arrow and select to view all the items that you have commented/asked follow-up questions about, those that you've already approved, change the date range, or transaction amount range for a more custom filter from the dropdown menu.

### Approve Expenses

Filter  
To do • 03/18/2020 to 03/18/2021

Approval status  To do  Awaiting response  Completed

Date range  to

Expense type  All  Cash  Card

Amount range  to

Options  
Receipt linked  All  Yes  No  
Policy alert  All  Yes  No  
Credit  All  Yes  No

Show results Reset

68.84 USD	PNC 1940 (4199)
168.94 USD	PNC 1940 (4199)
132.90 USD	PNC 1940 (4199)
178.40 USD	PNC 1940 (4199)
15.93 USD	PNC 1940 (4199)

**Step 4:** You can click on the little arrow next to each P-Card transaction to review the details. Please make sure to review for **business purpose description, FOAP**, and **receipt attachment** (receipt required for every transaction on grant/3xxxxx funds and also required for transactions \$75 or more for non-grant funds). Then scroll down to the bottom of the side window where you can either ask a question or leave a comment, or if everything looks good, you can click on the **Approve** button.

### Approve Expenses

Filter: To do • 03/18/2020 to 03/18/2021 Find

Reed Kroloff Select all

Transaction	Amount	Action
Caviar*antique Taco PNC 1940 (4199)   12/08/2020	68.84 USD	Yes
Zoom.Us 888-799-9666 PNC 1940 (4199)   12/10/2020	168.94 USD	Yes
U-Haul Moving & Storage O PNC 1940 (4199)   12/10/2020	132.90 USD	Yes
Mailchimp PNC 1940 (4199)   12/26/2020	178.40 USD	Yes
Adobe Acropro Subs PNC 1940 (4199)   12/27/2020	15.93 USD	Yes
Dropbox W7rf552642fs PNC 1940 (4199)   12/30/2020	48.26 USD	Yes

### Caviar\*antique Taco |

Amount	Date	Issuer	Type	Merchant category group
68.84 USD	12/08/2020	PNC 1940	Purchase	Eating And Drinking Places

#### Workflow

#### Additional information

Prog	2600	Academic Support
------	------	------------------

Approval rules

#### Transaction Step 1

All transaction amounts

Approval required

Approvers:

No comments added

Ask a question or add a comment

250 characters left

Send

Approve

Once you click **Approve**, you have completed the card holder's P-Card reconciliation cycle.

Options