1.1 The Vision

- The Image module was originally designed for users to upload receipt images from their desktop. Users were asked to log into Visa Intellilink Spend Management and navigate to a particular account statement or a transaction in order to upload an image to those transaction(s).

- The new enhancements incorporated into the Image Module allow the users to email and upload receipt images against their account from any location via their mobile phones or devices. Users can take a photo of their receipt on-the-go from their mobile device and email them to their Image Library, enabling a quick and easy user experience for uploading receipt images for linking.

- The key feature added to this release is the ability for a user to take a picture of their receipt with their smart phone and then email the image directly into their new Image Library in Visa Intellilink Spend Management. From there, they can easily access the receipt image and attach it to a transaction(s).
2.1 Set-up for Email

- Each employee set up in Visa IntelliLink Spend Management has their own unique email address which enables the system to determine which Image Library the incoming email should be routed to. This approach caters for shared scanners and account delegation scenarios, because the email is routed to the employee’s library based on the email address.

- To obtain your personalized email address, login to Intellilink, click on Account Statements...
  - At the bottom of your transaction list, click on the link called “Manage Receipt Images”
  - The Image Library will open. Click on the button called “Upload Via Email”, this will display your personalized email address.
    - Refer to Figure 1
Figure 1 - Receipt Imaging Email Address from Image Library
Figure 2 - Receipt Imaging Email Address from Image Library

https://intellink.spendmanagement.visa.com/?accountNumber_7E123H9-CB44-43S-B8867-E034371FF2F- Windows Internet Explorer

Manage Receipt Images

Upload

Upload via Email

VISA Upload via Email

To upload receipts to your account via email, please send your receipts to the email address below:

bsav.u.rzzr.rstfj@receipt-upload.com

We recommend saving the email address to your contact list or address book to avoid having to enter the email address every time.

Close
**Receipt Imaging Email**

- It is suggested that each user saves their receipt imaging email address as a contact in any mobile device they will be using to submit receipts. How the user saves this email address will vary by device and operating system, but most cardholders will be allowed to click on the email address to open up a new email window and the address can be added as a contact from there. This will automatically be synced up with your smartphone if your organisation’s networks are configured appropriately; if not then cardholders will have a one-time set up task to add the address as a contact in each mobile device.

- **Using Email feature from a Smartphone or Tablet**

- The exact method of emailing images will vary depending on which device you use, but generally there are 3 steps:

- Take the photo and access it from the Image Gallery (aka Camera Roll for an iPhone):

- Choose to email it and select a recipient from your contact list....aka “P-Card Image Receipt.”
Receipt Imaging Email

- Send the email. Once you hit Send the message will be queued up and loaded and should be available in your Image Library within a few minutes.

- Note: If your device stores orientation information in the metadata of the image, then the image will auto-rotate in the image library to match the rotation of the device during picture-taking. This will ensure the image is the right way up when emailed into the image library.
Scanning a Receipt Image from a Local Scanner to Desktop

*Two ways to scan an image: Scanner to Desktop vs. Mobile*

Repeat the steps notated in Figure 1. Once in the image directory, click on the “Upload” button.
Once the “Upload” button is clicked, a file directory will appear and then choose the desktop file in which the image resides.

Once the receipt is located, double click or choose open and the receipt is uploaded into your image library.
To Link Receipt Images to Reconciled Transactions

- Once all of your transactions have been reconciled with the correct notations and FOAP information, you will need to link the image receipts to each appropriate transaction(s).
- Access your Image Library through clicking on the “Managed Receipt Images” link located at the bottom of your transaction list. All unlinked images will appear.
- Click on the receipt image then select the “Manage Receipt Links” button....as shown in Figure 3....(note: you may also delete the image with the “Delete” button just to the right)
- The objective is to link all receipts to each transaction and clear your Image Library. Once you have linked all images, there will be no images located in the library.
Figure 3
To Link Receipt Images to Reconciled Transactions Cont...

- Once you have selected the image a transaction list will appear. You will then need to check the box next to the transaction(s) in which the image belongs with.

- Click on “Save” at the bottom to save the transaction(s). Once you have done so, the image will not appear in your image library. It will now be located in the “Linked Images” tab at the top of the page.....as shown in Figure 4.
### Manage Receipt Unks

#### Transactions

<table>
<thead>
<tr>
<th>Reference</th>
<th>Date</th>
<th>Image Count</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Intermountain Lock And Se</td>
<td>03/04/2014</td>
<td>0</td>
<td>8982</td>
</tr>
<tr>
<td>Intermountain Lock And Se</td>
<td>03/04/2014</td>
<td>0</td>
<td>1250</td>
</tr>
<tr>
<td>Intermountain Lock And Se</td>
<td>03/04/2014</td>
<td>0</td>
<td>6640</td>
</tr>
<tr>
<td>OfficeMax CT</td>
<td>03/05/2014</td>
<td>0</td>
<td>1699</td>
</tr>
<tr>
<td>Mountain States Filter C</td>
<td>03/05/2014</td>
<td>0</td>
<td>2238</td>
</tr>
<tr>
<td>Flex A Chart Mfg</td>
<td>03/06/2014</td>
<td>0</td>
<td>3018</td>
</tr>
<tr>
<td>OfficeMax CT</td>
<td>03/06/2014</td>
<td>0</td>
<td>10999</td>
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<tr>
<td>Intermountain Lock And Se</td>
<td>03/06/2014</td>
<td>0</td>
<td>4910</td>
</tr>
<tr>
<td>Amazon Mktplace Prnts</td>
<td>03/09/2014</td>
<td>0</td>
<td>9849</td>
</tr>
<tr>
<td>Larson Distributing Compa</td>
<td>03/10/2014</td>
<td>0</td>
<td>1360</td>
</tr>
<tr>
<td>Intermountain Lock And Se</td>
<td>03/11/2014</td>
<td></td>
<td>9920</td>
</tr>
</tbody>
</table>
Each P-Card transaction receipt is to be kept on file either in a hard copy file or electronically for a period of 7 years.

If you are keeping electronic receipt images, the hard copy receipt must be maintained for a period of 30 days **OR** until the end of the statement period when all transactions have:

- Been reconciled...
- All images have been verified for clarity and accuracy...
- All transactions have been approved by the Department Head / Chair...
- The monthly download is complete...
Contacts:

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