The Home Screen

After logging in, the *Home* screen displays. The *Home* screen is a dashboard of information specific to your individual spending accounts and role within your company—cardholder, approver, and/or administrator.

Home • Expenses • • Approvals •	✓ Reports ✓			👤 Aaron 🗸
To create a NEW Expense report click hu Expense Reports Cash Expenses Approvals Pinned Reports My Information	ere MY EXPENSES Big Bank 1 Action Required Pence 51 0 Recent Periods ~ (a) Cash Expent Action Required 0	ling Approval Current Bal 16,91 ses Pending Approval 1	Corporate Card VISA 0020 ance (USD) Available Credit (USD) 0.67 -10,210.67 Current Balance (USD) 97.20	ABC Company Company
Transaction Search - Personal Expenditure Analysis Spend - Employee Suppliers - Employee Analysis - Employee	APPROVALS	Info Provided	1 Employee Info Required O	Important Note Expense Reports are due the 3rd Friday of each month, and must include receipts for all items over \$50.00. Last visit: 05/04/2016

Navigation

Navigation sits along the top of the *Home* screen.

Click a top-level menu item to see an expanded menu. For example, click **Expenses** to see your statements, then click a statement period to view transactions for that period.

The items displayed in the top-level menu depend on your role and your organization's settings.

Tip: Areas with items requiring your attention are marked with a red dot (●).



Quick Actions

Quick Action buttons allow you to initiate the creation of new expenses directly from the *Home* screen. There is no need to navigate anywhere. Simply click **©** Expense Reports or **©** Cash Expenses (WAC does not have) to get started.

Directly below the *Quick Action* buttons are links that display full lists of items requiring your attention.

Note: Available *Quick Action* buttons and links depend on your role and your organization's settings.

My Actions Expense Reports Cash Expenses Card Expenses Cash Expenses Expense Reports

Menus

The Visa IntelliLink Spend Management menus include:

Menu	Description
Home	Click to return to the Home screen.
Expenses	Click to manage your transactions, expense reports, and account statements.
Approvals	Click to view and approve transactions. If you are not an approver of transactions, you will not see this menu.
Reports	Click to view the reports you can run. This is determined by your role in the organization and which reports have been made available for your access.
L Profile	Click to log out, get help, and view and manage account features and personal settings—including your <i>Image Library</i> , password, and memorable word.

Pinned Items

You can *pin* the menu items you use most often for easy access. To pin an item, click the selection next to it. To unpin an item, click the selection. Pinned items appear at the right of their top-level menu, and also on the *Home* screen in the *Pinned* panel.

VIS	A Spend Management			BigBan
Home	Expenses Approvals		Reports 🗸	L Aaron
	C Reports			★ Pinned My Information
	My Information	>	Account Details	Transaction Search - Personal
	Expenditure Analysis	>	Personal Details	Expenditure Analysis
	Company Administration	>	Transaction Search - Personal 🛛 🖈	Spend - Employee
			Billing Account Summary	Suppliers - Employee
				Analysis - Employee

Panels

The *Home* screen uses *panels* to display summary information.

- The *My Expenses* panel provides a snapshot of your spending account activity and links to your most recent statements.
- If your company supports out-ofpocket/cash accounts, you will see a Cash Expenses section.
- If you are an approver of transactions, you will see an *Approvals* panel.

Tip: Click the red numbers within panels to immediately begin coding and/or approving transactions.

MY EXPENS	ES		
🚍 Big Ban	k 1		Corporate Card VISA ****** ****** 0020
Action Required	Pending Approval	Current Balance (USD)	Available Credit (USD)
51	0	10,910.07	-10,210.67
Recent Periods	s ^		
04/15/2016	to 05/14/2016		>
103/15/2016	to 04/14/2016		>
(5) Cash Ex	penses		
Action Required	Pending /	Approval Currer	t Balance (USD)
0	1	97.	20
APPROVALS			
🗹 Approva	als		1 Employee
Approval Require	d Info Provi	ided Info R	equired
1	0	0	

The Profile Menu



View and manage account features and personal settings from the **2** Profile menu:

Image Library

The *Image Library* is your personal storage space for receipt images in **Visa IntelliLink Spend Management**. You can view your receipt images, upload new receipt images, and see which images have already been linked to your transactions.

 Choose Profile menu > Image Library.

> **Note**: To learn more about working with receipt images, see the <u>*Receipt Imaging*</u> section in this document.



Language

You can change the language used in the interface of **Visa IntelliLink Spend Management** to any one of twenty languages.

- **5.** Choose **Profile menu > Language**.
- 6. Click your preferred language.

Note: The language chosen here updates the language preference in your *Personal Settings* area, ensuring that every time you log in to **Visa IntelliLink Spend Management**, the interface displays in your preferred language.

Select Language Preference	
Cymraeg	Deutsch
English (UK)	English (US)
<u>Español</u>	Español (America Latina)
Français	Français (Canadien)
Italiano	Nederlands
Norsk	Português
Português (Brasil)	Suomi
<u>Svenska</u>	<u>Türkçe</u>
<u>Русский язык</u>	日本語
简体中文	<u>繁體中文(台灣)</u>

Personal Settings

The Personal Settings screen displays your personal details and provides links to view and change many settings in **Visa IntelliLink Spend Management**. To display the *Personal Settings* screen:

Choose Profile menu > Personal Settings.

Note: For some companies, the information displayed is read-only and cannot be changed by users.

At the left of the *Personal Settings* _____ screen are links to various application settings.

	Visa IntelliLir Spend Mana	nk gement		BigBank
Home	• Expenses 🗸	• Approvals 🗸	Reports 🗸	Aaron 🕻
Perso	nal Settings	l.		
The follow any questi	ing diagram map is ai ons or wish to change	med to help you confige settings not available	ure and manage your own personal settings. here then please contact your system adminis	If you have trator.
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		Report Group	s Reports	
	X	Approval Role	Approval Rules	
	and Details			
Pe Acco Man D Exp	Employees Unt Management agement Codes Default Codes ense Templates	Aaron Griffin - Employee ID Username Company Unit Phone Number Email Address Date Added Date Modified Date Terminating	Personal Details Edit 6 user106@ebbtc Sales 650-432-8462 Addriffin@ebbt.com 07/23/2014 04/30/2015	
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