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# Contents

**About this Guide** .................................................................................................................................... 2  
**Related Documents** ............................................................................................................................ 2  
**Mobile App Overview** ............................................................................................................................ 2  
**Download and Install the Mobile App** ................................................................................................. 3  
**Supported OS Versions** .......................................................................................................................... 3  
**Link and Sign In to the Mobile App** ..................................................................................................... 4  
  Select a language ........................................................................................................................................................... 8  
  Reset your PIN ................................................................................................................................................................. 9  
**Expenses** ................................................................................................................................................ 10  
  Transaction Type icons ...................................................................................................................................................... 11  
  Code transactions using expense templates ..................................................................................................................... 12  
  Code transactions manually .............................................................................................................................................. 17  
  Find and save your favorite codes ................................................................................................................................... 21  
  Take photos and upload receipt images ............................................................................................................................. 23  
  Link receipt images to transactions ................................................................................................................................. 26  
  Create a cash expense ................................................................................................................................................... 30  
**Approvals** .............................................................................................................................................. 32  
  Approve transactions ...................................................................................................................................................... 33  
  Undo an approval ............................................................................................................................................................ 35  
  Approval status .............................................................................................................................................................. 38  
**Accounts** ................................................................................................................................................ 39  
**Mobile app notifications** .......................................................................................................................... 40  
  Enable or disable mobile notifications ........................................................................................................................... 40  
  Enable or disable specific notifications .......................................................................................................................... 42  
  Manage mobile app notifications ................................................................................................................................. 43
About this Guide

The purpose of this guide is to help Visa Commercial Card users (cardholders and approvers) understand how they can use the Visa IntelliLink Spend Management mobile app to view summary information about their card account(s), code transactions, and approve transactions on iOS and Android devices.

If you need more information or assistance with any of the concepts or procedures described, please get in touch with your company’s Program Administrator.

Note: The content in this guide may differ from what is seen within the Visa IntelliLink Spend Management mobile app due to your company’s settings.

Related Documents

Visa IntelliLink Spend Management (Desktop): Cardholder User’s Guide
Visa IntelliLink Spend Management (Desktop): Approver User’s Guide
Visa IntelliLink Spend Management Mobile App – Quick Reference Android & iOS
Visa IntelliLink Spend Management – Mobile App FAQs

Mobile App Overview

Available for both Android and iOS, the Visa IntelliLink Spend Management mobile app provides convenient anywhere access to your card transactions.

As a cardholder:

- View summary information about your card account(s)
- View and code your expenses (if your company uses expense management functionality)
- Use your phone to take photos of your receipts
- Link the receipt images on your phone to your expenses
- Create cash expenses
- Receive and manage mobile app notifications

As an approver:

- View and approve expenses
- Request more information about an expense

Note: Delegate use cases are not currently supported in the mobile app. We are working hard to develop this feature, and anticipate it being included in a future release. Thank you for your patience.
Download and Install the Mobile App

1. From the search area on the Apple App Store or the Google Play Store, search for Visa Spend Management, or Visa IntelliLink Spend Management (if necessary).

2. Select the Visa Spend Management app.

3. If prompted, tap Accept (from the App Permissions page).

4. Then do one of the following:
   - Google Play: Tap Install > Open.
   - App Store: Tap Get (or the iCloud icon) > Open.

5. An icon similar to the following will be placed on your device.

6. Tap the icon to start the app.

7. Review and accept the Terms of Use and Privacy Policy.

Supported OS Versions

- **Apple iOS**: the App is optimized for the most recent release of the operating system minus one version.

- **Android**: the App is optimized for the most recent release of the operating system minus two versions, or otherwise where an older version is still used by more than 10% of the global Android user base, as determined by reference to: https://developer.android.com/about/dashboards/index.html
Link and Sign In to the Mobile App

If supported by your company, you can link the mobile app to your Visa IntelliLink Spend Management desktop data. There are two ways to do this: You can sign in to the mobile app using the same username and password you use for the desktop application, or, you can sign in to the mobile app using a QR Code. As a best practice, we recommend using the QR Code option. Here’s how:

First, in the Visa IntelliLink Spend Management desktop application:

1. Click Profile menu > Mobile App.

2. Click Get QR code. A QR Code will display in the dotted frame within the window.

3. Launch the Visa IntelliLink Spend Management mobile app on your phone or tablet. The icon looks like this:
Then, in the Visa IntelliLink Spend Management mobile app:

1. On the Log In screen, click **USE QR CODE**.

2. Using your mobile device, **scan the QR code** displayed within the desktop application.
3. **Enter a name** for the device. Should you need to, this allows you to identify and manage the device from the desktop application.

4. Click **Done**.

5. Next, **enter and confirm a 5-digit PIN**.

   **Note**: You will use this PIN, instead of your username, password, and memorable word to log in to mobile app in the future.
6. After entering and confirming your 5-digit PIN, the Expenses screen displays. That’s it! You’re logged in and ready to use the mobile app.

Note: If you are using the Reporting Only version of Visa IntelliLink Spend Management, the Accounts screen displays instead. Skip to the Accounts section to learn more.

If you are an Approver, the Approvals screen displays instead. Skip to the Approvals section to learn more.
Select a language

To change the language settings in the mobile app:

1. Tap the three-line **Options** menu icon on the main login screen.
2. Next, tap **Languages** from the menu.
3. Select your desired language from the list.

The language settings can also be changed from within the app’s settings.

1. From any screen in the app, tap the three-line **Options** menu.
2. Tap **Settings**.
3. Tap **Language**.
4. Select your desired language from the list.
Reset your PIN

1. From any screen in the app, tap the three-line **Options** menu.

2. Tap **Settings**.

3. Tap **Reset your PIN**.

4. In the **Reset PIN** popup, tap **Reset**.

5. You will be prompted to repeat the steps described in the **Link and Sign In to the Mobile App** section, above.
Expenses

The Expenses screen is where you view and code your expense transactions. Tapping a transaction lets you attach a receipt, apply an expense template, or manually code an expense. If you are using the Reporting Only version of Visa IntelliLink Spend Management, you will not see this screen in the mobile app. To continue, skip to the Accounts section of this document.

If it is not already displayed, tap Options menu (≡), > Expenses to view the Expenses screen. Here is a quick tour:

- **Options or to Log out.**
- **Transaction Type Icon**, (based on Merchant Category of payee).
- **Transaction payee.**
- **Transaction date.**
- **Transaction status.** (To do, Pending approval, or Completed.)

Tap to **Search** transactions by payee, amount, or date.

Tap for **Options** or to Log out.

Receipt attached.

Transaction currency and amount.

Comment or Question from Approver or Employee.

Tap to **Add a receipt** to your Image Library or enter a cash expense.

**For Android:** Tap ( ) at the bottom right of the screen. **For iOS:** Tap ( ) at the top of the screen.
Next to each transaction on the Expenses screen is a circular Transaction Type icon. An image within each icon (at the right) represents the Merchant Category Group of the payee (e.g. Eating and Drinking Places).

Here are examples of the images you will see within the Transaction Type icons:

<table>
<thead>
<tr>
<th>Merchant Category Group</th>
<th>Icon</th>
<th>Merchant Category Group</th>
<th>Icon</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airlines</td>
<td></td>
<td>Medical</td>
<td></td>
</tr>
<tr>
<td>Auto Rental</td>
<td></td>
<td>Miscellaneous</td>
<td></td>
</tr>
<tr>
<td>Business Expenses/Services</td>
<td></td>
<td>Other Supplies</td>
<td></td>
</tr>
<tr>
<td>Cash Advances</td>
<td></td>
<td>Professional Services</td>
<td></td>
</tr>
<tr>
<td>Clothing/Shoes/Uniforms</td>
<td></td>
<td>Retail</td>
<td></td>
</tr>
<tr>
<td>Eating And Drinking Places</td>
<td></td>
<td>Transportation</td>
<td></td>
</tr>
<tr>
<td>Education Services</td>
<td></td>
<td>Utilities</td>
<td></td>
</tr>
<tr>
<td>Entertainment</td>
<td></td>
<td>Wholesale</td>
<td></td>
</tr>
<tr>
<td>Equipment And Furniture</td>
<td></td>
<td>Financial service</td>
<td></td>
</tr>
<tr>
<td>Facilities Maintenance</td>
<td></td>
<td>Fuel</td>
<td></td>
</tr>
<tr>
<td>Freight/Courier/Warehouse Services</td>
<td></td>
<td>Mail order</td>
<td></td>
</tr>
<tr>
<td>Government</td>
<td></td>
<td>Office supplies</td>
<td></td>
</tr>
<tr>
<td>Health Services And Supplies</td>
<td></td>
<td>Construction</td>
<td></td>
</tr>
<tr>
<td>Hotels And Motels</td>
<td></td>
<td>Telecommunications</td>
<td></td>
</tr>
</tbody>
</table>

Note: The color assigned to each Merchant Category Group and Transaction Type icon has no inherent meaning. Its only purpose is to help you more easily identify similar transactions on the Expenses screen.
**Code transactions using expense templates**

*Expense templates* are a best-practice method of coding **high volume, repeatable spend**—such as travel card transactions that are always coded the same way, project-based work for which transactions should be coded the same way, or group-share purchasing cards that are split the same way, including cost allocation and percentage of spend.

Expense Templates assign pre-determined codes and percentage split allocations (optional) to transactions. This can save a significant amount of time by eliminating the repetitive process of manually coding and splitting expense transactions individually. It can also eliminate human error by removing the manual calculation of complex split allocations. Expense Templates are the recommended method to code transactions using the mobile app.

Expense Templates must first be created in the desktop application (*Profile menu > Personal Settings > Expense Templates*) before they can be selected in the mobile app. Users may create their own Expense Templates or Administrators may assign Expense Templates to employees using an Expense Template interface file upload.

For more information, see the document *Visa IntelliLink Spend Management: Expense Templates*, available from your Company Program Administrator or your Card Issuing Bank.

1. If necessary, from any app screen tap the **Options** menu.

2. The Options menu slides in from the left. Tap **Expenses**.

The To do icon (49) shows how many transactions require your attention.
3. On the Expenses screen, tap the transaction you want to view or code...

...for example, National Car Rental.

Tip: To find a specific transaction, tap or to Search or Filter the list.

4. Tapping an expense displays the Transaction Details screen. Tap Edit to begin coding, or tap Receipt to attach a receipt image to the transaction.

Transactions are sorted by Date, the most recent at the top.

System messages.

Tap to attach a receipt image.

Tap to begin coding a transaction.
5. In response to the question, *How do you want to code?* click **Apply Expense Template**.

If you would rather code manually, see the **Code Transactions Manually** section below to learn how.

6. Select an Expense Template from your list of Expense Templates to apply to the transaction. For this demo, tap **Travel Expenses**.

**Note:**
*Travel Expenses* was created for this demo and may not appear in your app.

To learn more about Expense Templates, see the document *Visa IntelliLink Spend Management: Expense Templates*, available from your Company Program Administrator or your Card Issuing Bank.

The Star ★ icon marks your **Preferred Expense Template**. It will always appear at the top of the list.

To select or change your Preferred Expense Template, click **Profile menu > Personal Settings > Expense Templates** from within the desktop application.
7. Next, be sure to complete any required fields. In this case, a Description of the expense is required by the company.

Tip: If necessary, scroll to see the entire transaction.

8. Tap Complete after selecting an Expense Template and completing any required fields. Submits the transaction for manager approval.
9. The transaction is **submitted** to your manager for approval.

The transaction is also removed from the *Expenses* screen, which is filtered (by default) to show only transactions with a status of *To do*.

---

**Tip:** To view previously completed transactions, tap the **Filter** icon, then tap **Pending approval**, or **Completed**, as needed.

---

**Note:** At this time, users can code individual transactions using the app. Expense reports can only be created via the main website. We are working hard to develop this feature, and anticipate it being included in a future release. Thank you for your patience!
Code transactions manually

Coding transactions manually is a best-practice method of coding low-volume, non-complex spend—examples being ad-hoc expenses such as postage, printing, business services, and meeting expenses. Manual coding can also a good solution for project-based spend when all coding is the same except the project number. All coding fields and options are customized to suit the requirements of your organization.

1. If necessary, from any app screen tap the Options menu.

2. The Options menu slides in from the left. Tap Expenses.

The To do icon (49) shows how many transactions require your attention.
3. On the Expenses screen, tap the **transaction** you want to view or code...

...for example, **United Air**.

**Tip**: To find a specific transaction, tap **or** **to Search or Filter the list**.

4. Tapping an expense displays the **Transaction Details** screen.
   Tap **Edit** to begin coding, or tap **Receipt** to attach a receipt image to the transaction.

Transactions are sorted by **Date**, the most recent at the top.

System messages.

Tap to attach a receipt image.

Tap to begin coding a transaction.
5. If required, enter **tax information**. Then tap each **code type** and select an appropriate **charge code** from the list that displays. If the list is empty, you can search for a code by name or description.

To learn how to speed this process, see the **Find and Save Your Favorite Codes** section below.

**Note:** The code types shown here (Dept, CC Code, and Project) were created for this demo and may not appear in your app.

6. When coding is complete, tap **Save**.

7. After tapping **Save**, you are returned to the **Expense Details** screen to **review the coding information**.
8. If the expense details are correct, tap Complete.

Note: Steps 7 and 8 may not be required by your organization. If not, your transaction is immediately sent for approval after tapping Save in Step 6.

9. The transaction is submitted to your manager for approval. The transaction is also removed from the Expenses screen, which is filtered (by default) to show only transactions with a status of To do.

Note: At this time, users can code individual transactions using the app. Expense reports can only be created via the main website. We are working hard to develop this feature, and anticipate it being included in a future release. Thank you for your patience!
Find and save your favorite codes

It is possible to save your most frequently used codes as *Favorite* codes. This saves you time by making them immediately accessible from any code type dropdown. Here’s how:

1. Tap a *code type* to begin coding. For example, *Dept* at the right.

2. If you have not yet selected your favorite codes for a code type, you will see a *message* informing you that *You have no favorite codes*.

3. Tap anywhere in the *Search* field at the top of the window.

4. A list of all *Dept* codes displays. (You may need to scroll.)

5. If you cannot find the code you want to add as a favorite in the list, enter all or part of its *code name* or *description* in the Search field.

**Note:** To help, you can search using the wildcard character "%" anywhere in your search text. For example "ABC%1" finds any code starting with "ABC" and with the number "1" located anywhere within it, for example "ABC00100".
6. The code(s) that meet your search criteria are listed (up to the first 60 codes). If the particular code you are looking is not in the list, refine your search.

7. Click the **White Star** icon to save the code as a favorite.

**Note:** If you are unable to find a code you should have access to, contact your administrator.

8. The icon will turn to a gold Star 🌟 to indicate the code is now a favorite.

9. The next time you code, the favorite displays in the code type dropdown. Simply **click the code** to apply it to the transaction.

**Note:**
- A maximum of 15 codes may be added to the Favorites list for each code type.
- Favorite codes you have designated within the desktop application are available in the mobile app, and vice-versa.
Take photos and upload receipt images

A great feature of the mobile app is the ability to take a photo of a receipt immediately after receiving it, and before its matching transaction appears on your account statement. This helps you keep track of your receipts while traveling, and makes it easy to link them to your transactions once they are ready to be coded.

If you use the Spend Management mobile app to take photos of your receipts, the images are immediately uploaded to your Image Library, where you can easily find them when linking receipt images to your transactions.

Use the mobile app to take a photo and upload the receipt image (for iOS Users):

1. Tap the Add button (+) at the top of the screen.

2. In response to What would you like to add?, tap A receipt using the camera.

3. Take a photo of the receipt.

4. The image is immediately uploaded to your Image Library, where you can easily link it to its matching transaction after it appears on your account statement.

Tip: If you’ve already taken a photo using your phone, choose A receipt from the gallery to upload it to the Image Library.
Use the mobile app to take a photo and upload the receipt image (for Android Users):

1. Tap the **Add button** (    ) at the bottom of the screen.

2. Tap (    ), which means **A receipt using the camera**.

3. **Take a photo** of the receipt.

4. The image is *immediately uploaded* to your Image Library, where you can easily **link it to its matching transaction** after it appears on your account statement.

**Tip:** If you’ve already taken a photo using your phone, tap (    ) **A receipt from the gallery** to upload it to the Image Library.
Tips for taking a good receipt photo

- Take the picture in a well-lit area or turn on your flash.
- Lay the receipt on a flat, non-reflective, contrasting surface.
- Make the receipt as flat and wrinkle free as possible.
- Hold the camera directly above the receipt (not angled).
- Keep still so the picture is not blurry.
- Some receipts are very long, with the bottom part of the receipt taken up by vendor marketing. If this is the case, just photograph the part of the receipt that contains the important data (the merchant, transaction date, items purchased, subtotal, total, and taxes).
Link receipt images to transactions

1. Tap the Visa IntelliLink Spend Management mobile app icon on your phone or tablet.

2. On the Expenses screen, tap the transaction you want to attach a receipt to...

   ...for example, The Sun Hotel.

3. On the Transaction screen, tap RECEIPT.

   Tip: Tap to take a photo and upload receipt images to your Image Library immediately after receiving a receipt, and before the transaction appears in the app.
4. The Receipts screen displays, showing you unlinked images that were previously uploaded to the Image Library. Tap the Link icon (🔗) to attach an existing receipt image from the Image Library to the transaction.

Or, to attach a new receipt image to a transaction, see the next page.

Note: Use the Image Library in desktop version of Visa IntelliLink Spend Management to edit or delete the images displayed on the mobile Receipts screen.

To attach a new receipt image to a transaction (for iOS Users):

5. Tap the Add button (+) in the upper right-hand corner to attach a new receipt image to the transaction: either by taking a photo of a receipt with your device camera, or by selecting an existing receipt image from your Camera Roll.

6. The image is immediately attached to the transaction and you are returned to the Transaction Details screen. (There is no need to tap the Link icon.)

When tapped, the Add button (+) displays two options for attaching a new receipt image.
To attach a new receipt image to a transaction (for Android Users):

5. Tap the **Add button** (    ) in the lower right-hand corner to attach a *new receipt image* to the transaction: either by taking a photo of a receipt with your device camera (    ), or by selecting an existing receipt image (    ) from your Photos app.

6. The image is *immediately attached* to the transaction and you are returned to the **Transaction Details** screen. (There is no need to tap the **Link icon**.)

7. After linking a receipt, the **Transaction** screen redisplays.
   - To finish coding the transaction: Tap **Select** to choose an Expense Template, complete any **required fields**, then tap **Complete**. See the **Expenses** section above for more details.
   - Or, to code the transaction later: Tap **Complete**. You are returned to the **Expenses** screen. The transaction still appears in the list because it remains in **To do** status.
8. On the Expenses screen, tap another transaction to continue linking receipt images.

Tip: To view previously completed transactions, tap the Filter icon, then tap Pending approval, or Completed, as needed.
Create a cash expense

You can easily create cash/out-of-pocket expenses from within the mobile app. The specific workflow and screens you see may differ based on how your company is configured: using either the Basic Cash or Advanced Cash option.

1. Tap the **Add icon** (+) at the top of the screen.

2. In response to *What would you like to add?*, tap **A new cash expense**.
3. Enter a Description, the Date the expense was incurred, and the Amount of the expense.

4. Tap Next.

5. If required, tap Receipt to add a receipt image. See Link images to transactions for more information.

6. Tap Edit to begin coding. See Code transactions manually for more information.

7. If required, enter a Description of the cash expense.

8. Tap Complete to submit the cash expense to your manager for approval.
When a cardholder completes and submits a transaction, **Visa IntelliLink Spend Management** routes it to the managers who need to approve it. Who those managers are and the number needed to approve an expense is determined by your company, using customizable workflow rules.

The **Approvals** screen is where you review and approve expenses. If it is not already displayed, tap **Options** menu (☰), > **Approvals** to view the **Approvals** screen. Here is a quick tour:
Approve transactions

1. From any app screen, tap the Options menu.

2. The Options menu slides in from the left. Tap Approvals.

   \textbf{Note}: These first two steps are necessary only if you have set the Expenses screen as your Home page. Otherwise, the Approvals screen displays automatically whenever you start the app.

3. On the Approvals screen, tap a transaction to review and approve...

   ...for example, Andrew Phillips’ Whitcoulls Galleria expense.

   \textbf{Note}: This release of the mobile app supports \textit{transaction-based} approval only. The approval of expense reports from the mobile app is currently unsupported. We are working hard to develop this feature, and anticipate it being included in a future release. Thank you for your patience!
4. On the **Transaction Details** screen, review the expense—including the amount, receipt image (if present), coding, and any descriptions.

**Tip**: If necessary, scroll down to see the entire transaction.

5. To return the expense to the employee for more information, type your comment/question and tap **Send**. (Optional)
6. Tap Approve, as appropriate. The expense is removed from the To do list and transferred to the Recent approvals list.

Tip: To switch between the To do and Recent approvals lists, tap the Filter () icon at the top of the Approvals screen:

Undo an approval

Sometimes you need to change your approval of a transaction. For example, you inadvertently approved an expense initially, but meant to request more information. Here’s how:

1. From any app screen, tap the Options menu.

2. The Options menu slides in from the left. Tap Approvals.

Note: These first two steps are necessary only if you have set the Expenses screen as your Home page. Otherwise, the Approvals screen displays automatically whenever you start the app.

Tip: The To do icon () shows how many transactions await your review and approval.
3. On the Approvals screen, tap to filter the list by approval status.

4. In the Approval Status popup, tap Recent approvals.
5. In the Approvals list—filtered to show only recent approvals—tap a previous expense that you have approved.

In this case, let’s undo the approval of *Etta Candy’s Medline Industries* expense.

6. On the Transaction Details screen, tap **Undo** at the bottom right.

The current disposition of the expense (e.g. **Approved**) is displayed here.
7. After tapping *Undo*, the expense remains on screen. At this point you may:

**Send** a comment or question to the employee, or **Approve** again, if necessary.

**Note:** An expense remains in *To do* status until you Approve it.

---

**Approval status**

Approvals are governed by your company’s approval rules. At each change of approval status, the cardholder and/or approver may be notified of the change and requested to take necessary action to complete the process. For example, when you request more information from an employee regarding a transaction, it is automatically sent to them for comment. Most companies are configured so that a transaction is locked after it has been approved and extracted.
Accounts

The Accounts screen provides a quick way to view the details of a card account, including the account nickname (which you can set in the Profile menu > Personal Settings area of the main website), credit limit, current and available balance, payment amount due, and due date. You can also view and search for posted transactions within your accounts.

If it is not already displayed, tap Options menu (≡), > Accounts to view the Accounts screen. Here is a quick tour:

- Tap an Account name to view its details.
- Tap Details to view the card account details.
- Tap Transactions to view posted transactions. Switch to the Expenses screen to code the transactions.
- Tap to search for accounts by name.
- View the Available Balance and Current Balance

**Note:** The Accounts screen is a view-only feature. To code your expenses, use the Expenses screen instead. See the Expenses section of this document to learn how.
Mobile app notifications

Your company has the option to send notifications to your mobile device to remind you to complete specific tasks—such as Approval Required—or to inform you of transaction status changes—such as Expense Approved.

The notifications sent to your mobile device are selected and configured by your company administrator. The display of notifications on your mobile device is totally up to you. You can choose to receive all, some, or no notifications at all.

Enable or disable mobile notifications

From within the mobile app

1. The first time you log-in to the mobile app, the message at the right displays.

2. Tap Allow or Don’t Allow Spend Mgmt notifications to match your preference.

3. After your initial log in, tap the three-line Options menu at the top of the screen, then tap Settings to access the controls to enable or disable mobile app notifications on your device.
From your device settings

Due to differences in operating systems and carrier customizations, what is described below may differ from what you see on your mobile device. The basic steps, however, should be similar.

1. Tap the **Settings** icon on your mobile device.

2. Tap the **Notifications** app.

3. Tap **Spend Mgmt**.

4. Toggle **Allow Notifications** or **Show notifications** to turn notifications on or off.

   You may also configure other notifications options, as provided by your device operating system.

**Note**: System notification settings override mobile app notification settings. For example, if notifications are enabled in your mobile app, but your device is not configured to accept notifications from the mobile app in its system settings, mobile app notifications will not be received.
Enable or disable specific notifications

If your company has enabled mobile app notifications, you may opt-out of receiving some or all of the notifications sent to your mobile device depending on your company settings.

1. Start the Visa IntelliLink Spend Management desktop application.
2. Click Profile menu > Personal Settings > Notification Management.
3. In the Mobile column, switch the toggles to On (green) or Off (grey), to indicate your opt-out preferences.

Note:
- A disabled toggle means you cannot opt-out of a notification.
- N/A means a notification is not available on your mobile device.
Manage mobile app notifications

Notifications are displayed in the form your mobile operating system defines. By default, notifications generate a sound and vibrate. You can configure these notification options in your device Settings area—not in the mobile app itself.

Selecting a notification (using a method provided by your operating system) opens the mobile app. First, you will be asked to log-in by entering a password or PIN. Next, you will be taken to the area in the mobile app appropriate for the type of notification received. For example, if you are notified that you need to provide more information about a specific expense, you will be taken directly to that expense.

When a notification is received, a badge is placed next to the mobile app icon. The badge remains in place until the mobile app is opened again.