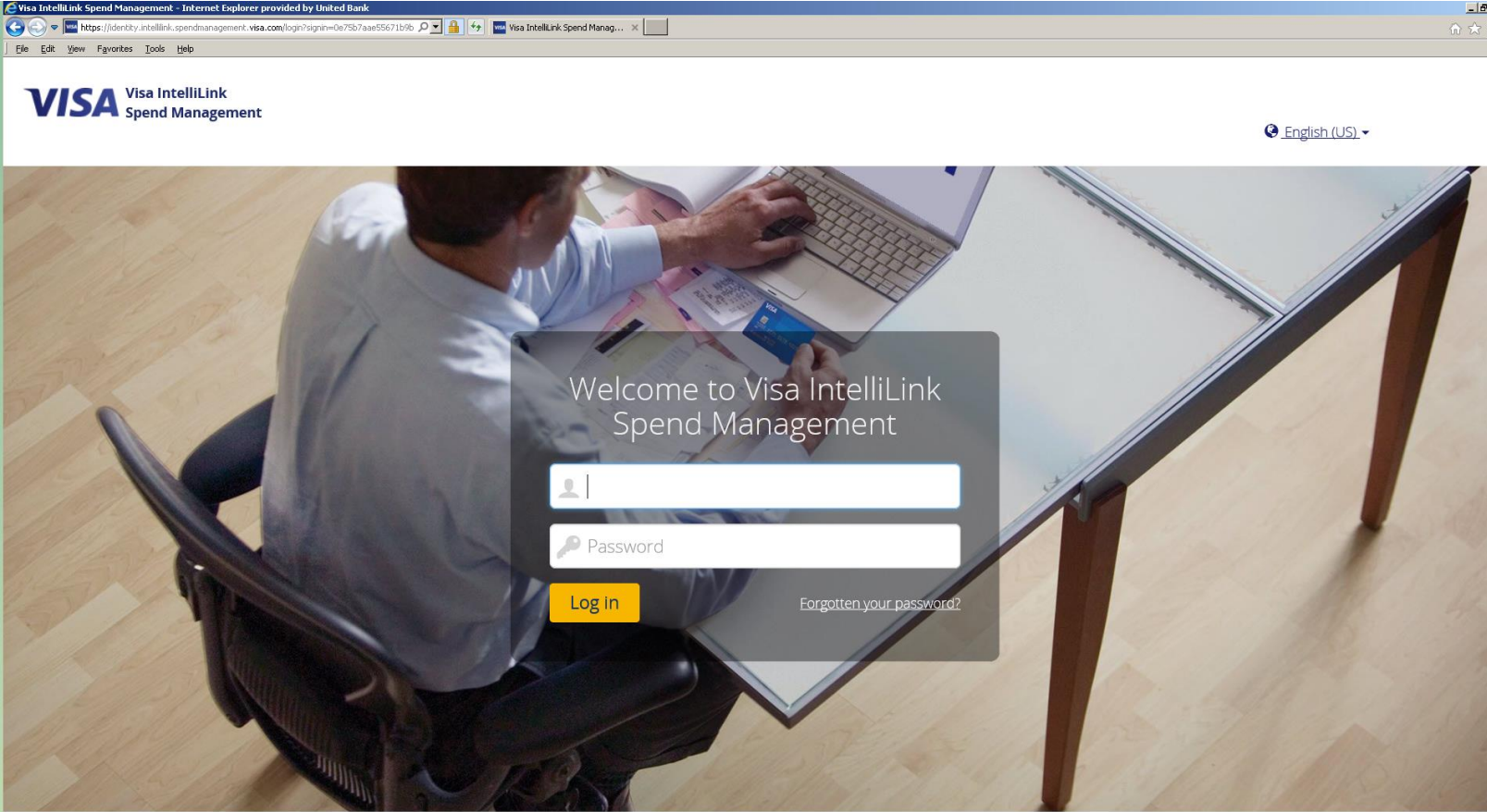


Visa Spend Management Cardholder Training

Login Page

The log in screen looks like this. Put in your user name, which is generally your email. Enter your password and Log in.



The screenshot shows a web browser window titled "Visa IntelliLink Spend Management - Internet Explorer provided by United Bank". The address bar displays a URL starting with "https://identity.intellink.spendmanagement.visa.com/login?". The page header includes the "VISA Visa IntelliLink Spend Management" logo on the left and a language dropdown menu set to "English (US)" on the right. The main content area features a background image of a person in a light blue shirt sitting at a desk with a laptop and a Visa credit card. Overlaid on this image is a semi-transparent login form with the text "Welcome to Visa IntelliLink Spend Management". The form contains two input fields: the first is preceded by a person icon and the second by a key icon and the label "Password". Below these fields is a yellow "Log in" button and a link that says "Forgotten your password?". At the bottom of the page, the footer contains the text "©2017 Visa. All rights reserved" on the left and a link to "Terms of Use" on the right.

Visa IntelliLink Spend Management

English (US)

Welcome to Visa IntelliLink Spend Management

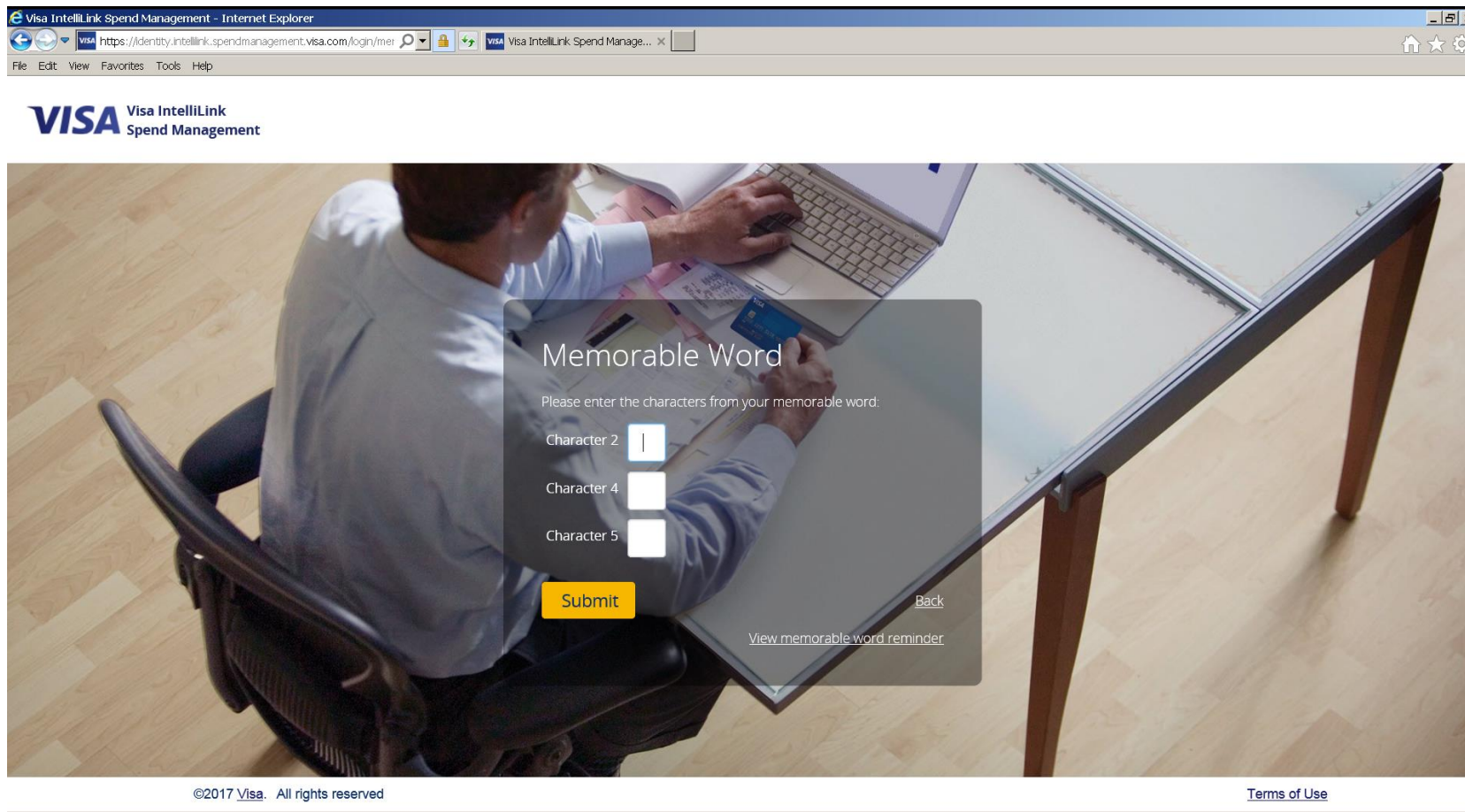
Log in

[Forgotten your password?](#)

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[Terms of Use](#)

This is a unique piece of authentication used by Visa. The first time you log in, you will select a memorable word. For instance, you may choose the name of your dog. His name is R O V E R. Each time you log in, you will be asked to enter 3 letters of that word. Below, the system is asking for the 2nd, 4th, & 5th. If you enter the word incorrectly, you will be taken back to the initial log in page. This does NOT mean your user name or password is wrong. The problem is generally your memorable word. Your Program Administrator will be able to see exactly what piece of the log in is incorrect. Therefore, if you tried more than once and cannot determine the problem, contact your administrator to find out what you are doing wrong.



Visa IntelliLink Spend Management - Internet Explorer

https://identity.intellink.spendmanagement.visa.com/login/mer

Visa IntelliLink Spend Management

Visa Visa IntelliLink Spend Management

Memorable Word

Please enter the characters from your memorable word:

Character 2

Character 4

Character 5

[Submit](#) [Back](#)

[View memorable word reminder](#)

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[Terms of Use](#)

Home Screen

The screenshot shows the Visa IntelliLink Spend Management interface within an Internet Explorer browser window. The browser's address bar displays the URL <https://intellink.spendmanagement.visa.com/#!/home>. The page header includes the Visa IntelliLink Spend Management logo on the left and the United Bank logo on the right. A navigation bar below the header contains links for Home, Expenses, and Reports, along with a user profile icon for Kerri. The main content area is divided into three sections: a left sidebar with 'Report Outbox' and 'Pinned' (with a tip to pin items), a central 'DELEGATED ACCOUNTS' section featuring a table with one entry for 'United Bank 3884' showing '1 Delegation' and an 'Attention Required' status, and a right sidebar with 'Announcements' including an 'Issuer Message' and an 'Important Note' about security. The footer contains the copyright notice '©2017 Visa. All rights reserved' and a link to 'Terms of Use'. The last visit date is noted as 11/14/2017.

Visa IntelliLink Spend Management

UNITED BANK

Home Expenses Reports Kerri

Report Outbox

Pinned

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

DELEGATED ACCOUNTS

United Bank 3884	1 Delegation
Attention Required	

Announcements

Issuer Message

Important Note

We will never ask you to provide credit card details, password credentials, or any personal information in an email or over the phone. If you do receive a request like this please report it immediately to your Administrator.

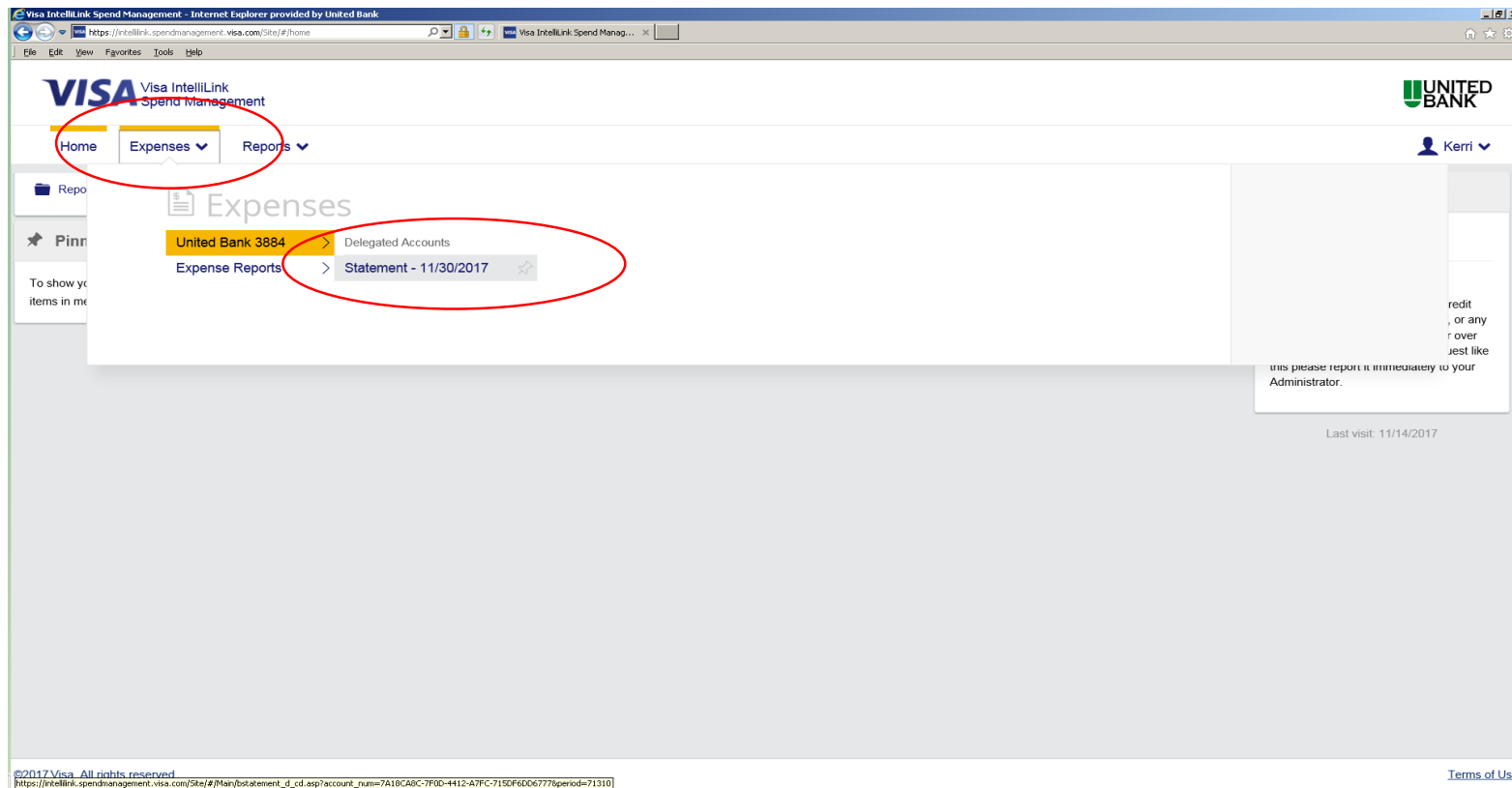
Last visit: 11/14/2017

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[Terms of Use](#)

Viewing Statements

- Go to the Expenses tab
- Choose the statement period you would like to view
- Expense tab will keep a history for 6 months. After 6 months, find statements by going to Reports and enter statement period.



Printing Statements

- Once you choose the statement period click the Download Statement Report at the bottom of page

Visa Intellink Spend Management | Account Statement - Internet Explorer provided by United Bank

https://intellink.spendmanagement.visa.com/Site/#/Main/bststatement_d_cd.asp?accoun... Visa Intellink Spend Manag...

File Edit View Favorites Tools Help

VISA Visa Intellink Spend Management

Home Administration Expenses Approvals Reports Kerri

Account Statement

12/15/2017 to 01/14/2018

Antanette Mattheiss - United Bank - Corporate (0003)

Current Balance	1,235.75
Previous Balance	3,472.17
Credit Limit	2,800.00

Tran Date	Supplier	Amount Incl	Allocation
12/18/2017	Continental	339.80	View ? !
12/18/2017	FI Corp File -Internet	150.00	View ? !
12/18/2017	Texaco 00306302	28.55	View ? !
12/31/2017	Office Max	76.17	View ? !
12/31/2017	Southwestair	114.70	View ? !
12/31/2017	Total Wine And More 207	8.39	View ? !
01/05/2018	National Car Rental	78.08	View ? !
01/07/2018	Auntie Annes Ohare T-2	18.82	View ? !
01/07/2018	United Air	421.24	View ? !
01/01/2018	Payment - Payment	-3,472.17	View

[Manage Receipt Images](#)

[Download Statement Report](#)

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[Terms of Use](#)

How to Code

- Click on the green question mark out from the transaction that needs coded

Visa IntelliLink Spend Management | Account Statement - Internet Explorer provided by United Bank

Administration mode: United Bank - 2 Premium Demo Log out

Visa IntelliLink Spend Management UNITED BANK

Home Administration Expenses Reports Corporate Administration Kerri

Account Statement
02/15/2018 to 03/14/2018
Carl Plummer - United Bank - Corporate (0008)

Tran Date	Supplier	Amount Incl	Allocation	
02/12/2018	Delta Air	1,006.58	View	? !
02/12/2018	Food Lion #2634	105.95	View	? !
02/12/2018	Target 00010413	45.99	View	? !
02/12/2018	Viceroy Snowmass	534.72	View	? !
02/21/2018	FI Corp File -Internet	150.00	View	? !
02/21/2018	United Air	503.90	View	? !
02/24/2018	Hilton Hotels	792.48	View	? !
03/01/2018	Continental	284.03	View	? !
03/01/2018	Hampton Inn Presque Isle	224.10	View	? !
03/01/2018	I2290 Com	39.95	View	? !
03/01/2018	Innsbrook Cab Co	183.00	View	? !
03/01/2018	Payment - Payment	-1,777.65	View	

Current Balance 3,870.70
Previous Balance 1,777.65
Credit Limit 1,200.00

[Manage Receipt Images](#)
[Download Statement Report](#)

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Finding Codes

- To search for codes click on the down arrow under Department and Account. (Business Purpose and Vendor are free text codes)
- Click search

Visa IntelliLink Spend Management - Internet Explorer provided by United Bank

https://intellilink.spendmanagement.visa.com/Main/Transaction_I.asp?transaction_ref=H407120180908qtkmerow&page=8wf=w

Transaction: Details

Purchase: 09/05/2018
Amount: \$384.40 USD
A [redacted]

Summary Coding Approval Advanced

	* Department	* Account	* Business Purpose	* Vendor	Amount Incl	Tax Code	
Line 1	[redacted]	[redacted]			384.40		i
Line 2	[redacted]	[redacted]					i
Line 3	[Search]	[redacted]					i
Line 4	[redacted]	[redacted]					i

More..

Balance 0.00

Description

Receipt ☐ ☒ ☐

[redacted]

Close Reset Save

- A search box will appear
- Click on All then search

Visa IntelliLink Spend Management - Internet Explorer provided by United Bank

https://intellilink.spendmanagement.visa.com/settings/Favourites_cc.asp?transaction_ref=H313420171108niyvjxqc&employee_num=Training&transaction_line=1&cc_type=100&account_num=7A18CA8C-7F0D-44!

VISA Accounts - Search

Please search for the code you require. Note that only the first 60 active codes will be returned matching your criteria.

Code Value

Description

Valid Codes Only Yes ☐ All ☒

VISA Accounts - Favorites

If you are unsure about a code please use the information icon after you have performed a search. This information will provide you with code manager details as well as specific comments added to the code for usage.

Add codes that you use regularly to your favorites below. This will place them within your select lists. A total of 15 codes per code type may be added to each list.

https://intellilink.spendmanagement.visa.com/settings/Favourites_cc1r.asp

- Your list of codes will appear
- Click the up arrow to assign the code to your transaction
- You may have multiple pages of codes; if you can not locate the code click on page 2, page 3.....

The screenshot displays the Visa IntelliLink Spend Management web application in an Internet Explorer browser window. The address bar shows a URL from visa.com. The page is divided into two main sections: "VISA Department - Search" and "VISA Department - Favorites".

VISA Department - Search

Please search for the code you require. Note that only the first 60 active codes will be returned matching your criteria.

Code Value
Description




Valid Codes Only Yes ☒ All ☐

Search

VISA Department - Favorites

If you are unsure about a code please use the information icon after you have performed a search. This information will provide you with code manager details as well as specific comments added to the code for usage.

Add codes that you use regularly to your favorites below. This will place them within your select lists. A total of 15 codes per code type may be added to each list.

Business Office Business Office   

[Page 1](#) [View Help](#)

- You can add codes that you use regularly to your favorites
- This will place them within your select list
- A total of 15 codes can be added to each list
- To add to favorites click the right arrow

Visa IntelliLink Spend Management - Internet Explorer provided by United Bank

https://intellilink.spendmanagement.visa.com/settings/Favourites_cc.asp?transaction_ref=H40712018082&usrdcfor&employee_num=SVCS_Lincisome_SVC&transaction_line=1&cc_type=102&account_num=858A6

VISA Account - Search

Please search for the code you require. Note that only the first 60 active codes will be returned matching your criteria.

Code Value
Description

Valid Codes Only Yes ☒ All ☐

Search

VISA Account - Favorites

If you are unsure about a code please use the information icon after you have performed a search. This information will provide you with code manager details as well as specific comments added to the code for usage.

Add codes that you use regularly to your favorites below. This will place them within your select lists. A total of 15 codes per code type may be added to each list.

Code Value	Description	Icons
10-1-17000-5202	Global : Special Events	↑ ⓘ ➡
10-1-17000-5502	Global : Office Supplies	↑ ⓘ ➡
10-1-17000-5521	Global : Travel	↑ ⓘ ➡
10-1-17000-5602	Global : Hospitality	↑ ⓘ ➡
10-1-17009-5523	Asia Council Board Meetings	↑ ⓘ ➡
10-1-17009-5604	Asia Council : Conferences	↑ ⓘ ➡
10-1-17009-5808	Asia Council : Programs	↑ ⓘ ➡
10-1-17010-5101	CT & So Am : Classroom Exp	↑ ⓘ ➡
10-1-17010-5110	Central & So Am : Housing	↑ ⓘ ➡

10-1-17000-5202 Global : Special Events ➡

- Once the coding is completed you will see a green checkmark out from the transaction

Visa IntelliLink Spend Management | Account Statement - Internet Explorer provided by United Bank

https://intellink.spendmanagement.visa.com/Site/#/Main/bstatement_d_cd.asp?accoun

Visa IntelliLink Spend Management

Visa IntelliLink Spend Management

UNITED BANK

Home Expenses Reports

Kerri

Account Statement

11/01/2017 to 11/30/2017

[Redacted] - United Bank - Purchasing ([Redacted])

Current Balance	190.42
Previous Balance	0.00
Credit Limit	10,000.00

Tran Date	Supplier	Image(s)	Amount Incl	
11/06/2017	[Redacted]	No	80.00	✓
11/08/2017	Costco Gas Tax Return 461	No	18.96	?
11/10/2017	[Redacted]	No	75.00	?
11/10/2017	[Redacted]	No	16.46	?

[Manage Receipt Images](#)

[Download Statement Report](#)

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Uploading Receipts

- You can upload from your PC or via email
- Each cardholder has a unique email address which enables the system to determine which image library the email should be routed to
- You can take a picture with your Smart Device and email directly to your image library in IntelliLink

- To link your receipt to your transaction click the paperclip, this will pull up your saved images

Visa IntelliLink Spend Management - Internet Explorer provided by United Bank
https://intellilink.spendmanagement.visa.com/Main/Transaction_.asp?transaction_ref=H313420171108niyfvjxcq&page=8wfw




Transaction: Details

Purchase: 11/06/2017
Amount: \$80.00 USD

Summary Coding Approval Advanced

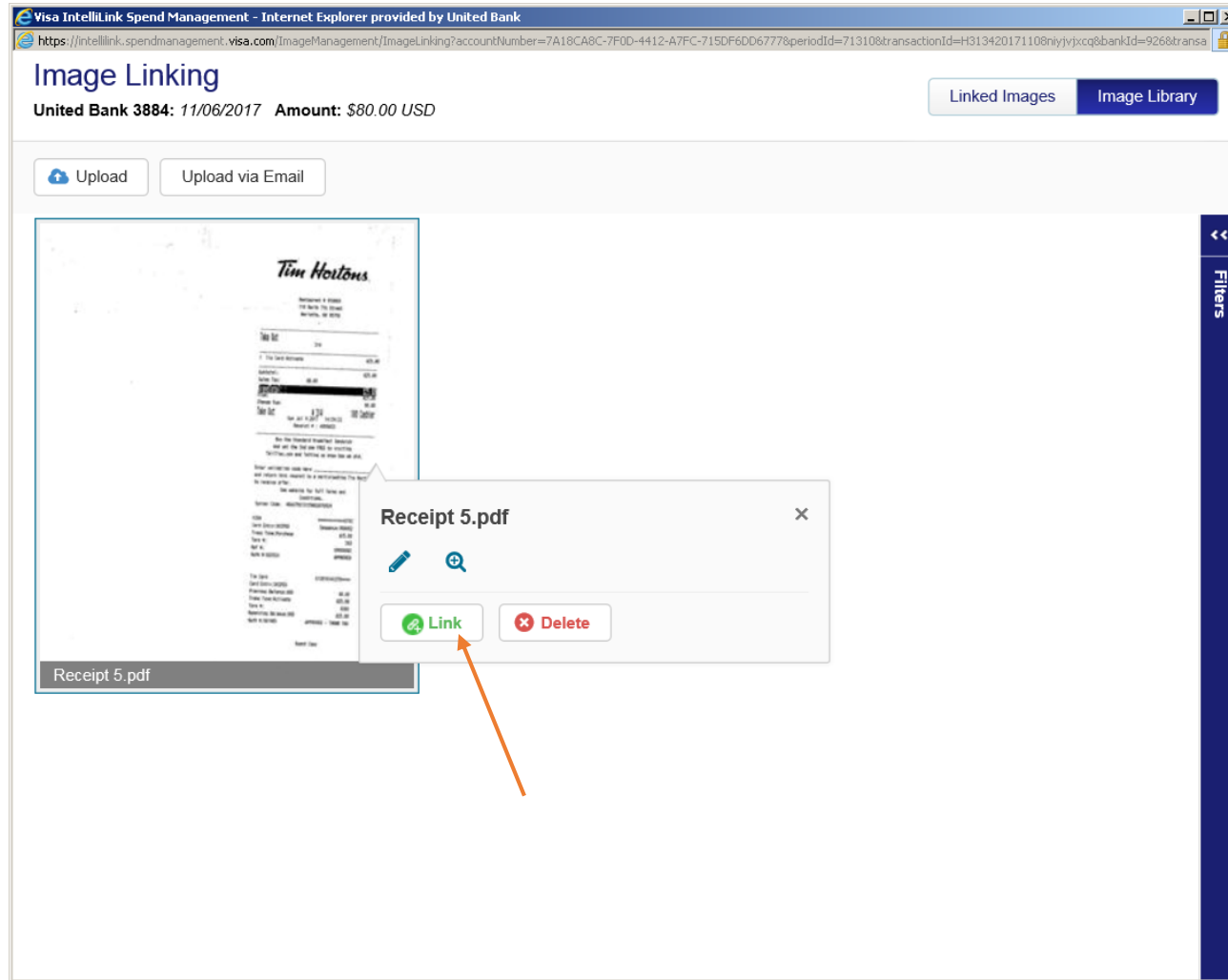
	Accounts	Class	Amount Incl	Tax Code
Line 1	<input type="text"/>	<input type="text"/>	80.00	<input type="text"/>
Line 2	<input type="text"/>	<input type="text"/>		<input type="text"/>
Line 3	<input type="text"/>	<input type="text"/>		<input type="text"/>
Line 4	<input type="text"/>	<input type="text"/>		<input type="text"/>
More..			Balance	0.00

Description

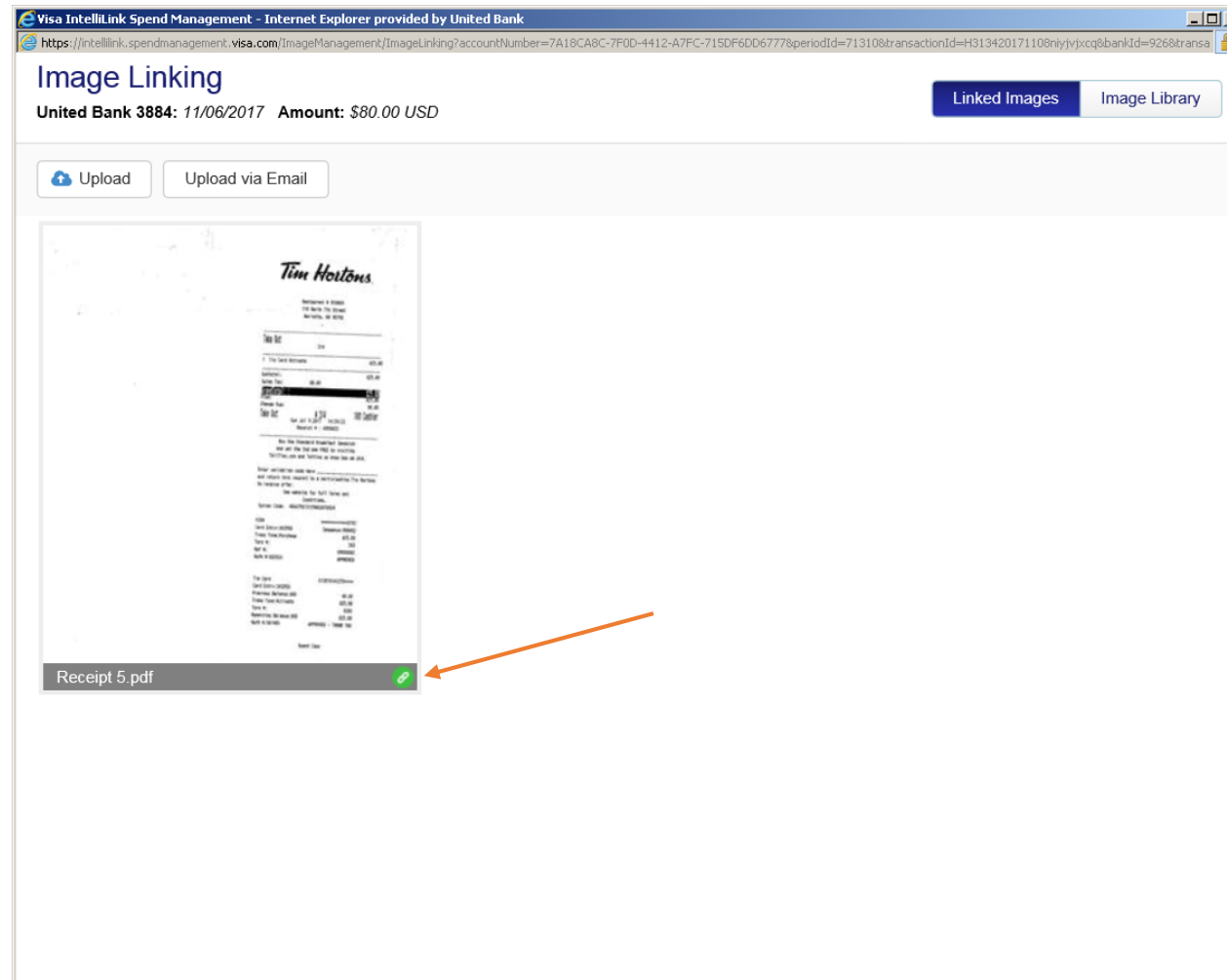
Receipt   

Close Reset Save

- A pop-up screen will appear. Find and click on the receipt you want to link then click link



- Once your image is linked you will see a green paperclip at the bottom of the image. Exit screen



- To confirm your image is linked you will see a green paperclip and a green checkmark

Visa IntelliLink Spend Management - Internet Explorer provided by United Bank

https://intellilink.spendmanagement.visa.com/Main/Transaction_1.asp?transaction_ref=H313420171108niyvjxcq&page=8wfw

Transaction: Details

Purchase: 11/06/2017
Amount: \$80.00 USD

1

Summary Coding Approval Advanced

	Accounts	Class	Amount Incl	Tax Code	
Line 1	<input type="text"/>	<input type="text"/>	80.00	<input type="text"/>	
Line 2	<input type="text"/>	<input type="text"/>		<input type="text"/>	
Line 3	<input type="text"/>	<input type="text"/>		<input type="text"/>	
Line 4	<input type="text"/>	<input type="text"/>		<input type="text"/>	
More..			Balance	0.00	

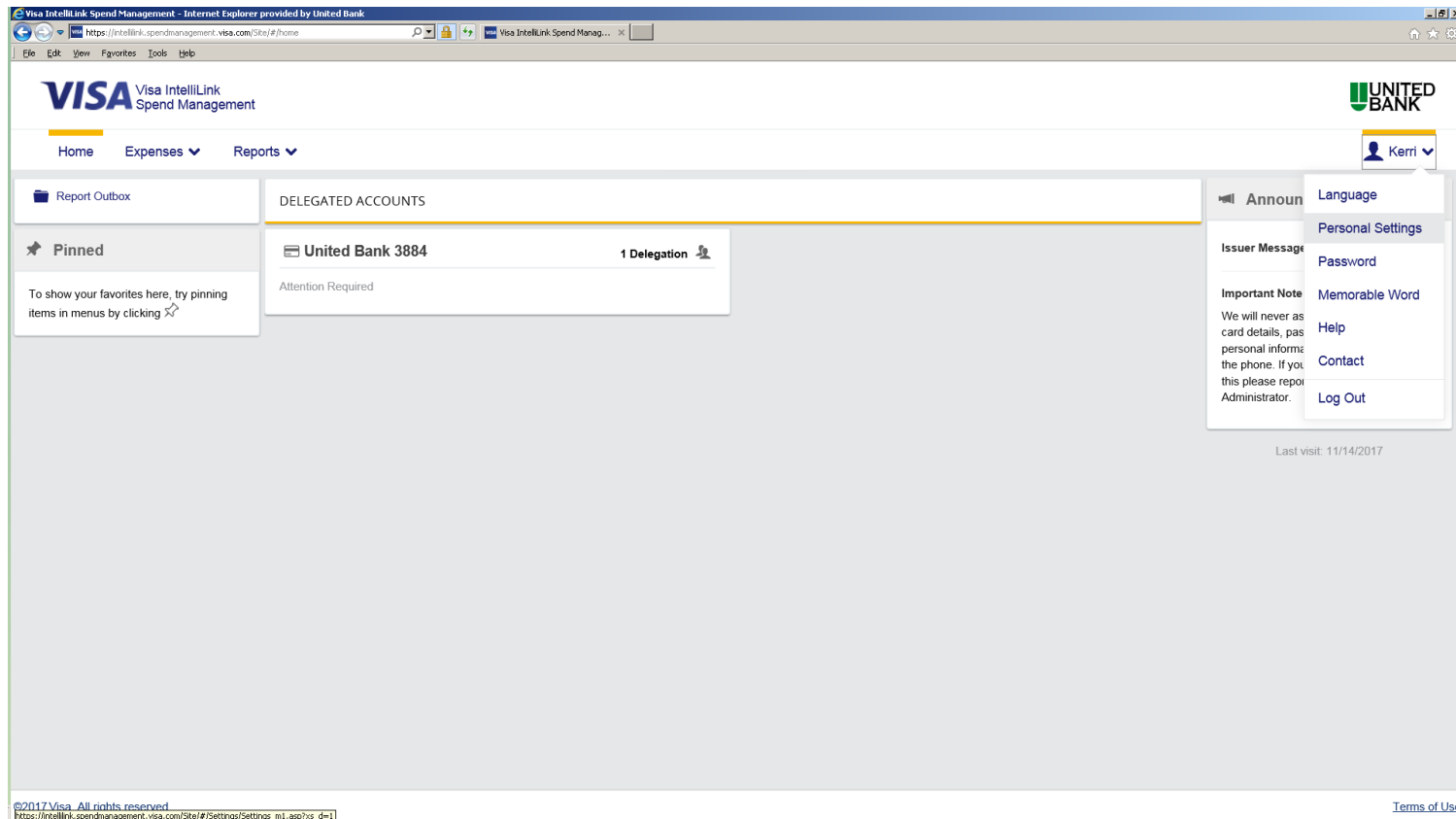
Description

Receipt

Close Reset Save

Finding your email address

- From the Home screen on the right hand side of your screen click the down arrow beside your name
- Click Personal Settings



- Your information will appear along with your Receipt Upload via Email address

Visa IntelliLink Spend Management | Personal Settings - Internet Explorer provided by United Bank

https://intellink.spendmanagement.visa.com/Site/#/Settings/Settings_m1.asp?xs_d=1

Visa IntelliLink Spend Management

UNITED BANK

Home Expenses Reports

Kerri

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

Kerri Threatt - Personal Details

Edit ..

Employee ID

Username

Company Unit

Phone Number

Email Address kerri.lincicome-threatt@bankwithunited.com

Date Added 11/14/2017

Date Modified -

Date Terminating -

Training

Receipt Upload via Email

kthr.u.kjcfll.ttnx9y@receipt-upload.com

More Info ..

Manager Details

No Manager

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Useful information

- You can update/change your password and memorable word at anytime
- To update click on the down arrow out from your name on the home screen
- Choose Password or Memorable word to update
- If you are locked out or have forgotten your information please contact your company Administrator

Visa IntelliLink Spend Management - Internet Explorer provided by United Bank

https://intellink.spendmanagement.visa.com/Site/#home

File Edit View Favorites Tools Help

VISA Visa IntelliLink Spend Management

UNITED BANK

Home Expenses Reports

Kerri

Report Outbox

Pinned

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

DELEGATED ACCOUNTS

United Bank 3884 1 Delegation

Attention Required

Announcements

Issuer Message

Important Note

We will never ask for your card details, password or personal information over the phone. If you receive a call or email asking for this information, please report it to the Administrator.

Image Library

Language

Personal Settings

Password

Memorable Word

Help

Contact

Log Out

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Help

- IntelliLink provides a help tab within the system for any questions you may have

