Visa Spend Clarity for Enterprise

How to Save Commonly Used Screens for Quick Access

RBC®

Why save commonly used Visa screens for quick access?

Are you familiar with how to bookmark a commonly used site as a favourite in your browser? Saving a commonly used Visa screen in Visa Spend Clarity for Enterprise works the same way, making it quick and easy to access screens from the homepage, without the navigation path!

How does it work?

Simply click the pin 📌 next to any report or page to set up the first favourited item! It's that simple!

To get started, here are common screens for you to save with descriptions and navigation paths:

Card Management

To create/maintain cards and pending authorizations
Navigation Path: Administration > Accounts and Cards > hover over Card Management > click the thumb pin icon

Company Set-up

To create/manage user profiles (unlock profiles, reset passwords & 2FA)
Navigation Path: Administration > Company Management > hover over Company Set up > click the thumb pin icon

Transaction Search – Company

To view and download posted transactions
Navigation Path: Reports > Expenditure Analysis > hover over Transaction Search - Company > click the thumb pin icon

Account Delegation

To delegate accounts to user who is not the cardholder
Navigation Path: Reports > Company Administration > hover over Account Delegation > click the thumb pin icon

Statement Manager

To view/download monthly billing and memo statements
Navigation Path: Reports > Company Administration > hover over Statement Manager > click the thumb pin icon

Card Details

To extract details for the cards (employee IDs for example)
Navigation Path: Administration > Company Administration > hover over Card Details > click the thumb pin icon