SAMFORD UNIVERSITY PURCHASING DEPARTMENT

REGIONS INTERSECT PCARD REPORTING

https://intersect.regions.com/

Intersect Mobile! from Regions on July 8

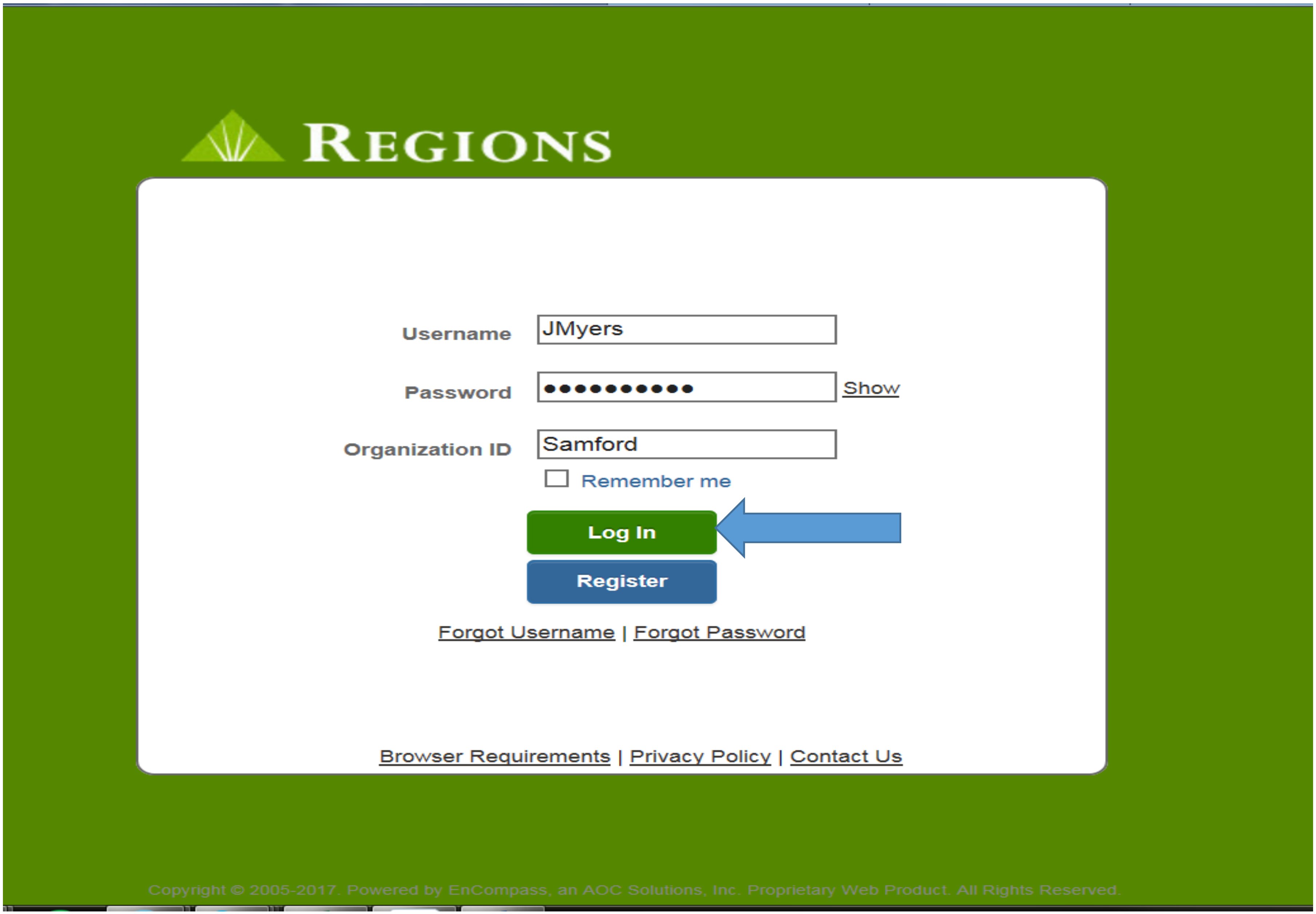
Did you know? Regions Intersect Mobile provides administrators and cardholders with access from any mobile device, allowing you to stay on top of requests and tasks. The user-friendly platform is optimized to your mobile web browser, delivering virtually all the same functionality that is available through your computer. Simply go to https://intersect.regions.com/ from your mobile device.

Transaction Maintenance: Processing Regions Intersect Transactions

The **Transaction Maintenance** module allows you to process and submit transactions for approval through Regions Intersect, as well as set financial codes for your organization.

Through **Transaction Maintenance,** referred to as **Transaction Maint**, you can:

- View and print statements
- Code transactions
- Submit transactions for approval
- Review and approve transactions, if applicable
- Create and edit financial codes
- Assign financial codes
- Create and maintain a fiscal calendar


REGIONS
Username
JMyers
Password
Show
Organization ID
Samford
Remember me
Log In
Register
Forgot Username | Forgot Password
Browser Requirements | Privacy Policy | Contact Us
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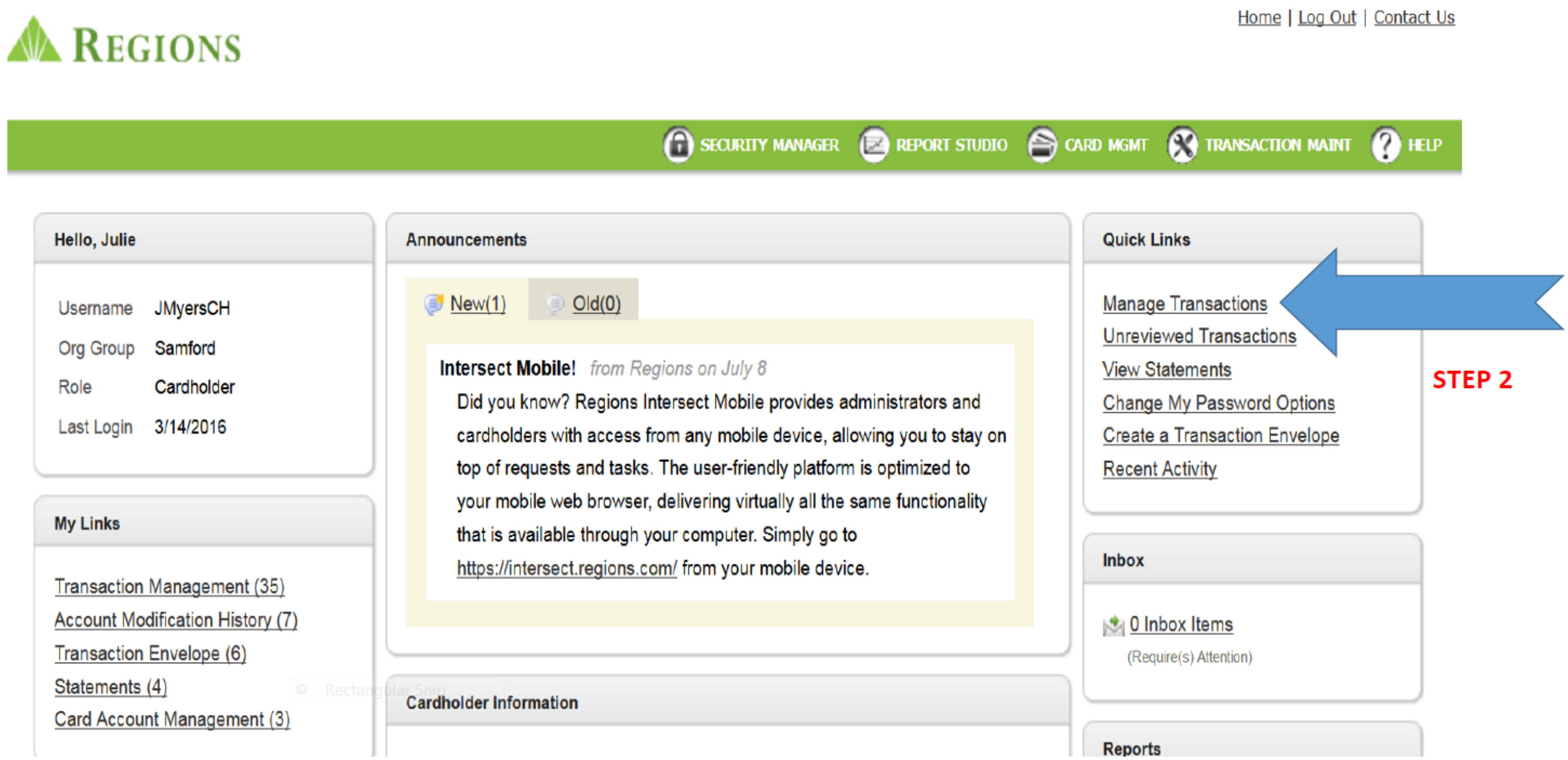
Under My Links select Card Account Management

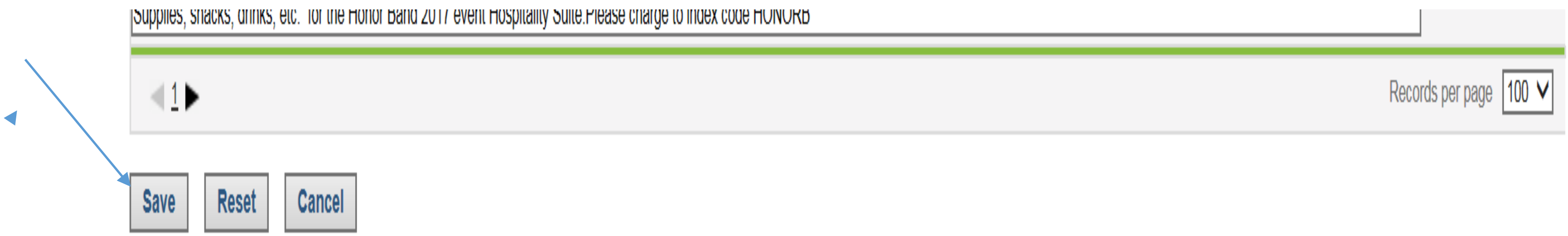


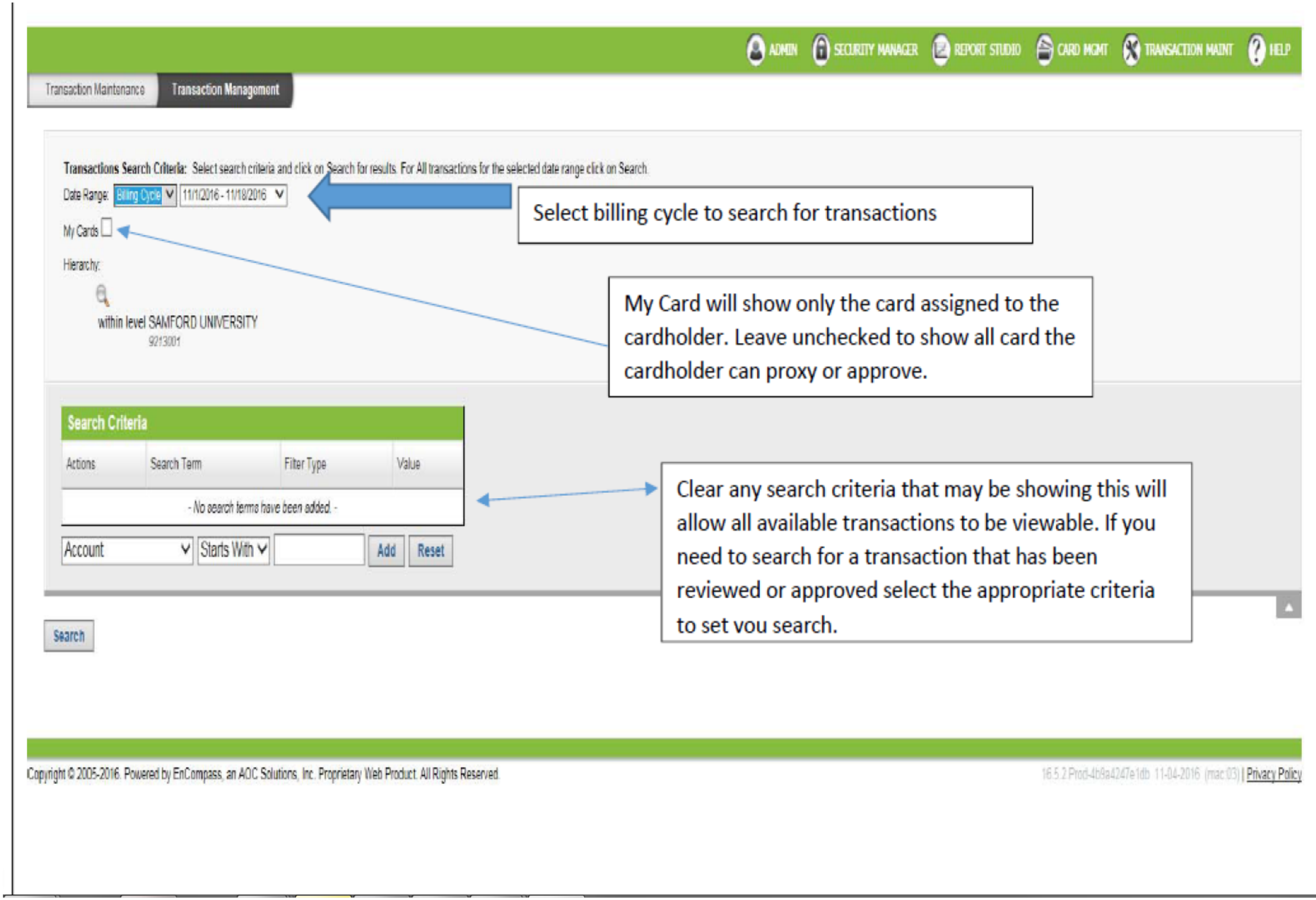
CARDHOLDER / APPROVER MUST HIT SAVE WHEN ADDING INFORMATION.

SAVE PRIOR TO LEAVING THE SCREEN YOU HAVE REVIEWED OR APPROVED.

NOT SAVING WILL RESULT IN THE LOSS OF YOUR CHANGES OR REVIEW/APPROVAL

- **ACCOUNT #**
- **BUSINESS PURPOSE**
- **CHECKING REV BOX**
- **APPROVE BOX**




ADMIN
SECURITY MANAGER
REPORT STUDIO
CARD MGMT
TRANSACTION MAINT
HELP
Transaction Maintenance
Transaction Management
Transactions Search Criteria: Select search criteria and click on Search for results. For All transactions for the selected date range click on Search.
Date Range: Billing Cycle 11/1/2016 - 11/18/2016
Select billing cycle to search for transactions
My Cards
Hierarchy:
within level SAMFORD UNIVERSITY
9213001
My Card will show only the card assigned to the cardholder. Leave unchecked to show all card the cardholder can proxy or approve.
Search Criteria
Actions
Search Term
Filter Type
Value
- No search terms have been added. -
Account
Starts With
Add
Reset
Clear any search criteria that may be showing this will allow all available transactions to be viewable. If you need to search for a transaction that has been reviewed or approved select the appropriate criteria to set you search.
Search
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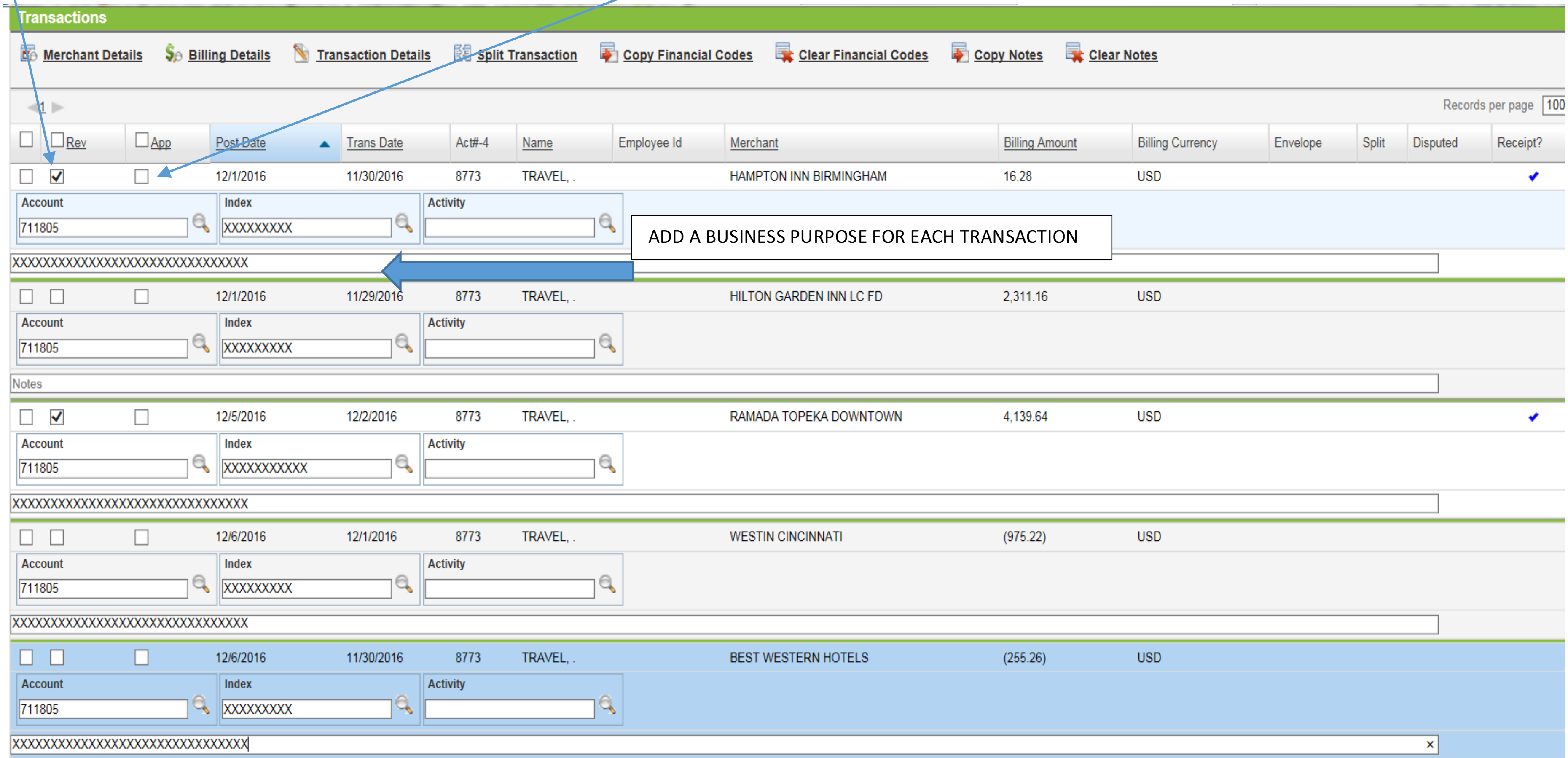
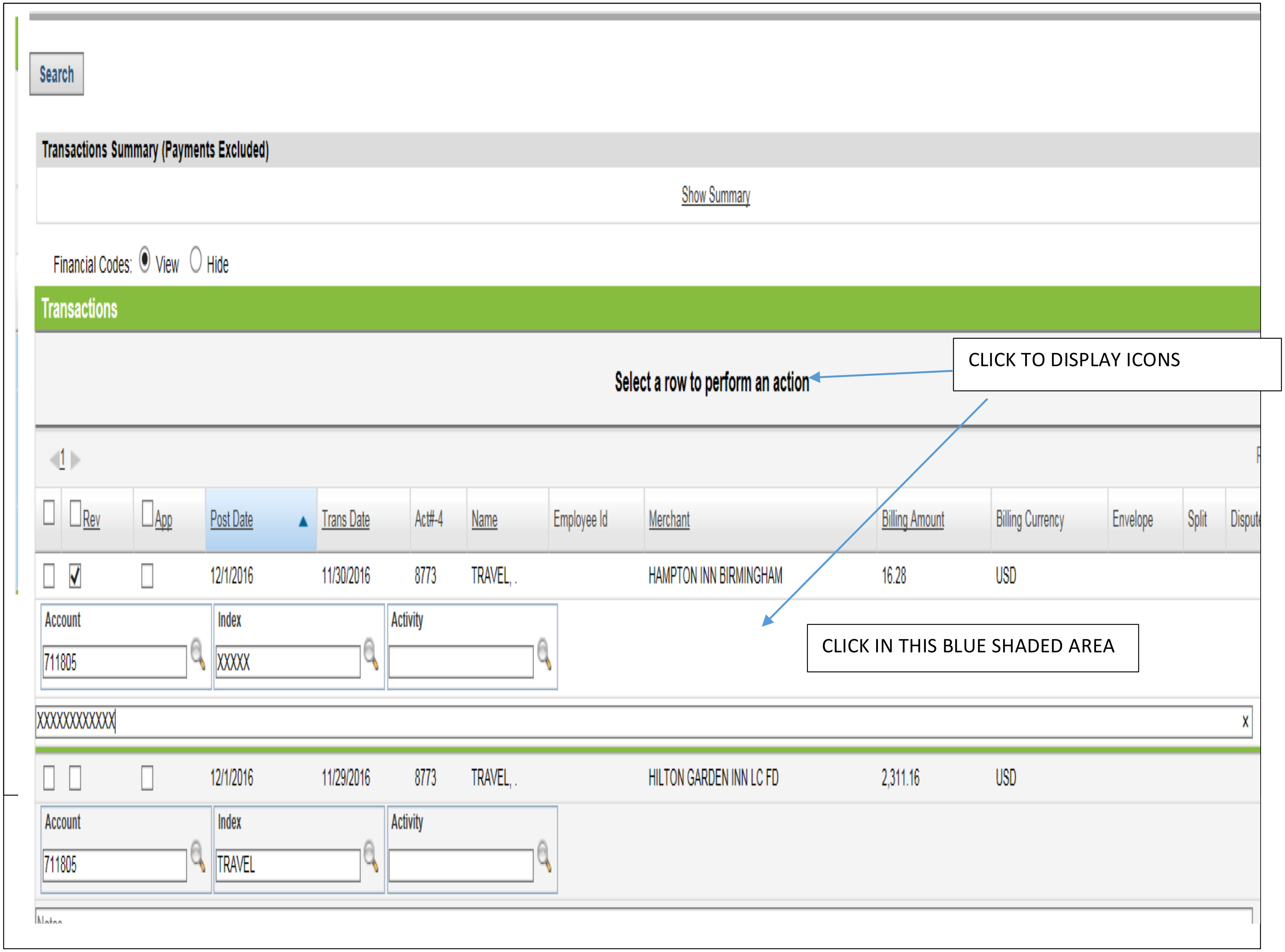
APPROVERS WILL SELECT BOX UNDER APP AND SELECT SAVE TO COMPLETE THE REVIEW FOR CARDHOLDER.

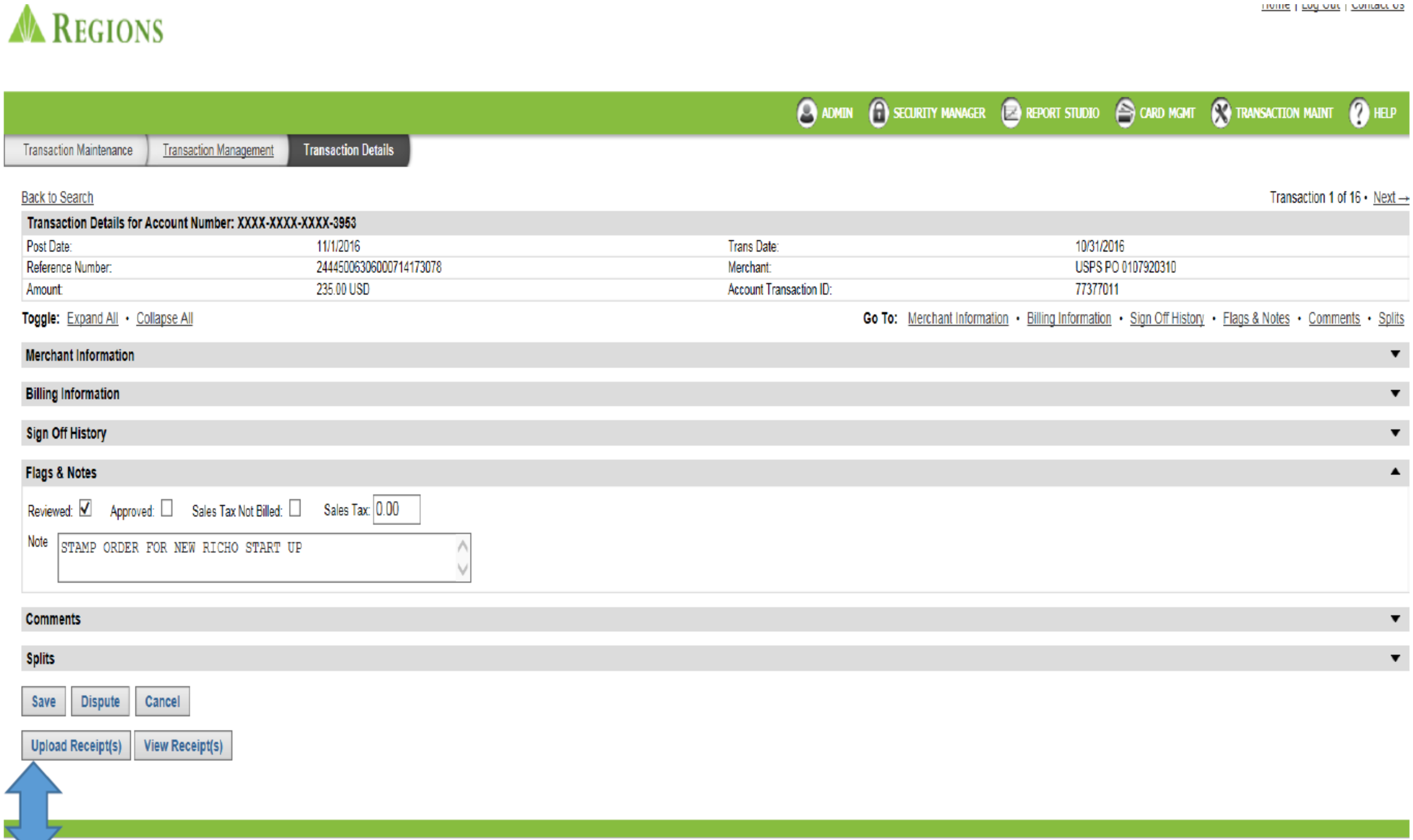
CARDHOLDER WILL SELECT BOX UNDER REV THEN SELECT SAVE AT BOTTOM OF PAGE



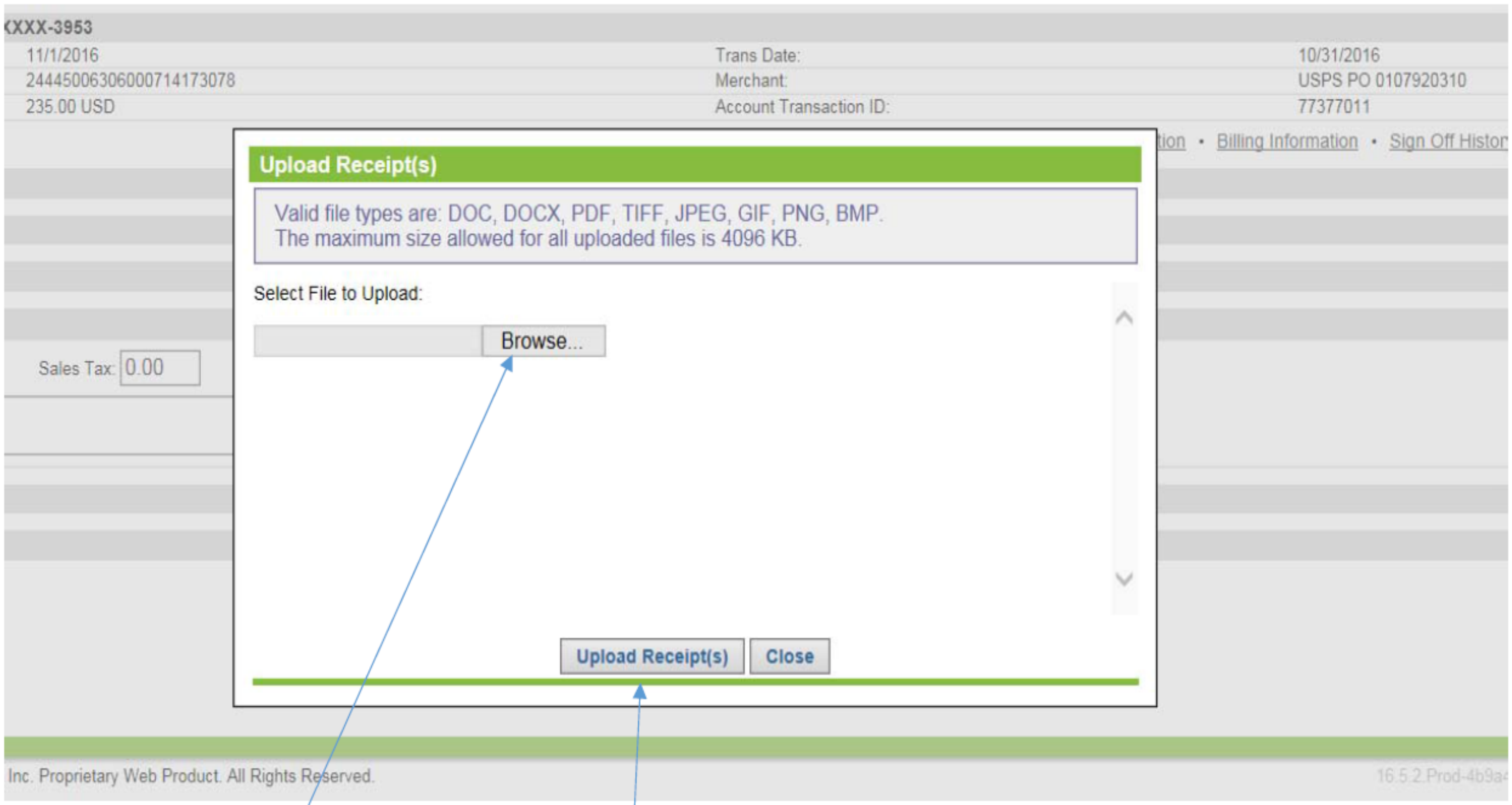
ADD A BUSINESS PURPOSE FOR EACH TRANSACTION

CARDHOLDER / APPROVER MUST HIT SAVE PRIOR TO LEAVING CURRENT PAGE


Search
Transactions Summary (Payments Excluded)
Show Summary
Financial Codes: View Hide
Transactions
Select a row to perform an action
CLICK TO DISPLAY ICONS
Rev
App
Post Date
Trans Date
Act#-4
Name
Employee Id
Merchant
Billing Amount
Billing Currency
Envelope
Split
12/1/2016 11/30/2016 8773 TRAVEL, . HAMPTON INN BIRMINGHAM 16.28 USD
Account
Index
Activity
711805
XXXXX
CLICK IN THIS BLUE SHADED AREA
XXXXXXXXXXX
12/1/2016 11/29/2016 8773 TRAVEL, . HILTON GARDEN INN LC FD 2,311.16 USD
Account
Index
Activity
711805
TRAVEL



Select Upload Receipts to upload your receipt



Click Browse to find your folder / location that contains your receipt. Once you select the receipt click upload.

REGIONS

Home | Log Out | (

ADMIN SECURITY MANAGER REPORT STUDIO CARD MGMT TRANSACTION MAINT

Transaction Maintenance | Transaction Management | **Transaction Details**

Information Saved.

Back to Search

Transa

Transaction Details for Account Number: XXXX-XXXX-XXXX-3953

Post Date:	3/16/2016	Trans Date:	3/14/2016
Reference Number:	24457460751005045604441	Merchant:	OFFICE DEPOT #1214
Amount:	233.57 USD	Account Transaction ID:	76133942

Toggle: Expand All • Collapse All

Go To: Merchant Information • Billing Information • Sign Off History • Flags & Notes • Comment

Merchant Information

Billing Information

Sign Off History

Flags & Notes

Reviewed: ☐ Approved: ☐ Sales Tax Not Billed: ☐ Sales Tax: 0.00

Note: USB CABLE HDMI CABLE USB DRIVE (4) USB STORAGE CASE

Comments

Splits

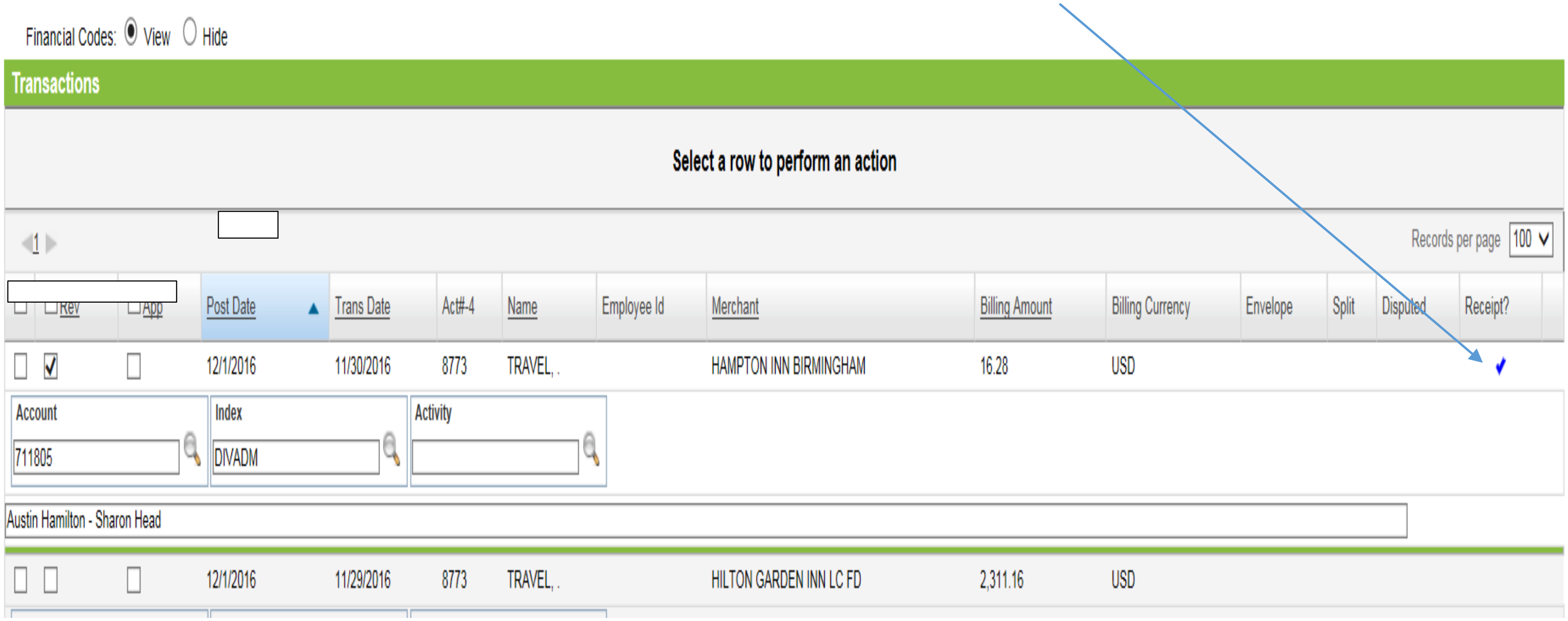
Save | Dispute | Cancel

Upload Receipt(s) | View Receipt(s)

WHEN RECEIPT UPLOAD IS COMPLETE SELECT BACK TO SEARCH

TO RETURN TO PREVIOUS SCREEN

IF YOUR RECEIPT LOADED CORRECTLY YOU WILL SEE A BLUE CHECK MARK UNDER THE RECEIPT CATEGORY. MISSING BLUE CHECK MARK INDICATES RECEIPT IS MISSING FROM TRANSACTION.



COMPLETE REVIEWED TRANSACTION WILL LOOK LIKE THIS AND WILL BE READY FOR FINAL APPROVAL