

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

Password

[Show](#)

Organization ID

☐ [Remember me](#)

**Log In**

**Register**

[Forgot Username](#) | [Forgot Password](#)

[Browser Requirements](#) | [Privacy Policy](#) | [Contact Us](#)

# Under My Links select Card Account Management



[Home](#) | [Log Out](#) | [Contact Us](#)

[SECURITY MANAGER](#) [REPORT STUDIO](#) [CARD MGMT](#) [TRANSACTION MAINT](#) [HELP](#)

Hello, Julie

Username JMyersCH  
Org Group Samford  
Role Cardholder  
Last Login 3/14/2016

My Links

[Transaction Management \(35\)](#)  
[Account Modification History \(7\)](#)  
[Transaction Envelope \(6\)](#)  
[Statements \(4\)](#)  
[Card Account Management \(3\)](#)

Announcements

[New\(1\)](#) [Old\(0\)](#)

**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.

Cardholder Information

Quick Links

[Manage Transactions](#)  
[Unreviewed Transactions](#)  
[View Statements](#)  
[Change My Password Options](#)  
[Create a Transaction Envelope](#)  
[Recent Activity](#)

Inbox

**0 Inbox Items**  
(Require(s) Attention)

Reports

**STEP 2**

**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**

Supplies, snacks, drinks, etc. for the Honor Band 2017 event Hospitality Suite. Please charge to index code HONWORK

◀ 1 ▶

Records per page 100 ▼

Save

Reset

Cancel

•

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 ☐

My Card will show only the card assigned to the cardholder. Leave unchecked to show all card the cardholder can proxy or approve.

Hierarchy:

within level SAMFORD UNIVERSITY  
9213001

#### Search Criteria

Actions	Search Term	Filter Type	Value
- No search terms have been added. -			
Account	Starts With		<input type="text"/>

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

**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

1

<input type="checkbox"/>	<input type="checkbox"/> Rev	<input type="checkbox"/> App	<u>Post Date</u>	<u>Trans Date</u>	<u>Act#-4</u>	<u>Name</u>	<u>Employee Id</u>	<u>Merchant</u>	<u>Billing Amount</u>	<u>Billing Currency</u>	<u>Envelope</u>	<u>Split</u>	<u>Disput</u>
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/1/2016	11/30/2016	8773	TRAVEL, .		HAMPTON INN BIRMINGHAM	16.28	USD			

Account

711805

Index

XXXXX

Activity

CLICK IN THIS BLUE SHADED AREA

XXXXXXXXXXXXX

x

<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/1/2016	11/29/2016	8773	TRAVEL, .		HILTON GARDEN INN LC FD	2,311.16	USD			
--------------------------	--------------------------	--------------------------	-----------	------------	------	-----------	--	-------------------------	----------	-----	--	--	--

Account

711805

Index

TRAVEL

Activity

[Back to Search](#)

Transaction 1 of 16 • [Next](#) →

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

Post Date:	11/1/2016	Trans Date:	10/31/2016
Reference Number:	24445006306000714173078	Merchant:	USPS PO 0107920310
Amount:	235.00 USD	Account Transaction ID:	77377011

**Toggle:** [Expand All](#) • [Collapse All](#)
**Go To:** [Merchant Information](#) • [Billing Information](#) • [Sign Off History](#) • [Flags & Notes](#) • [Comments](#) • [Splits](#)
**Merchant Information**
**Billing Information**
**Sign Off History**
**Flags & Notes**

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

Note: 
**Comments**
**Splits**
[Save](#) [Dispute](#) [Cancel](#)
[Upload Receipt\(s\)](#) [View Receipt\(s\)](#)


Select Upload Receipts to upload your receipt

XXX-3953			
11/1/2016	Trans Date:	10/31/2016	
24445006306000714173078	Merchant:	USPS PO 0107920310	
235.00 USD	Account Transaction ID:	77377011	

Upload Receipt(s)

Valid file types are: DOC, DOCX, PDF, TIFF, JPEG, GIF, PNG, BMP.  
The maximum size allowed for all uploaded files is 4096 KB.

Select File to Upload:

Browse...

Upload Receipt(s)

Close

Sales Tax: 0.00

Inc. Proprietary Web Product. All Rights Reserved.

16.5.2.Prod-4b9a4

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

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:	24445746075100504560441	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](#) • [Comments](#)

**Merchant Information**

**Billing Information**

**Sign Off History**

**Flags & Notes**

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

Note

**Comments**

**Splits**

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.**

Financial Codes: ☒ View ☐ Hide

**Transactions**

Select a row to perform an action

1

Records per page 100

<input type="checkbox"/>	<input type="checkbox"/> Rev	<input type="checkbox"/> App	Post Date	Trans Date	Act#-4	Name	Employee Id	Merchant	Billing Amount	Billing Currency	Envelope	Split	Disputed	Receipt?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	12/1/2016	11/30/2016	8773	TRAVEL, .		HAMPTON INN BIRMINGHAM	16.28	USD				<input checked="" type="checkbox"/>
<div><div>Account</div><div>711805</div></div> <div><div>Index</div><div>DIVADM</div></div> <div><div>Activity</div><div></div></div>														
Austin Hamilton - Sharon Head														
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	12/1/2016	11/29/2016	8773	TRAVEL, .		HILTON GARDEN INN LC FD	2,311.16	USD				

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

Transactions

Merchant Details

Billing Details

Transaction Details

Split Transaction

Copy Financial Codes

Clear Financial Codes

Copy Notes

Clear Notes

1

Records per page 100

<input type="checkbox"/>	<input type="checkbox"/> Rev	<input type="checkbox"/> App	Post Date	Trans Date	Act#-4	Name	Employee Id	Merchant	Billing Amount	Billing Currency	Envelope	Split	Disputed	Receipt?
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11/2/2016	11/1/2016	8773	TRAVEL .		FAIRFIELD INN & SUITES	1,405.80	USD				<input checked="" type="checkbox"/>
<div> <div>Account</div> <div>Index</div> <div>Activity</div> <div>711805</div> <div>DONE</div> <div>3015</div> </div>														
Track and Field Team Stay														
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11/2/2016	10/31/2016	8773	TRAVEL .		SOUTHWES 5262391038187	5,659.20	USD				<input checked="" type="checkbox"/>
<div> <div>Account</div> <div>Index</div> <div>Activity</div> <div>711800</div> <div>DONE</div> <div></div> </div>														
TRAVEL INFORMATION														
<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	11/3/2016	11/2/2016	8773	TRAVEL .		HAMPTON INN BIRMINGHAM	116.28	USD				<input checked="" type="checkbox"/>
<div> <div>Account</div> <div>Index</div> <div>Activity</div> <div>711805</div> <div>DONE</div> <div></div> </div>														