SAMFORD UNIVERSITY PURCHASING DEPARTMENT

REGIONS INTERSECT

PCARD REPORTING

https://intersect.regions.com/
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
Under My Links select Card Account Management

Hello, Julie
Username: JMeyersCH
Org Group: Samford
Role: Cardholder
Last Login: 3/14/2016

Quick Links
- Manage Transactions
- Unreviewed Transactions
- View Statements
- Change My Password Options
- Create a Transaction Envelope
- Recent Activity

Intersect Mobile!
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Inbox
- 0 Inbox Items
  (Receive(s) Attention)

Reports
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
Transactions Search Criteria: Select search criteria and click on Search for results. For all transactions for the selected date range click on Search.

Select billing cycle to search for transactions

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

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.
**ADD A BUSINESS PURPOSE FOR EACH TRANSACTION**

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

**APPROVERS WILL SELECT BOX UNDER APP AND SELECT SAVE TO COMPLETE THE REVIEW FOR CARDHOLDER.**

**CARDHOLDER / APPROVER MUST HIT SAVE PRIOR TO LEAVING CURRENT PAGE**
## Transactions Summary (Payments Excluded)

**Show Summary**

### Financial Codes:
- View
- Hide

### Transactions

**Select a row to perform an action**

<table>
<thead>
<tr>
<th>Account</th>
<th>Index</th>
<th>Activity</th>
</tr>
</thead>
<tbody>
<tr>
<td>711805</td>
<td>3000X</td>
<td></td>
</tr>
</tbody>
</table>

**Row 1**
- Date: 12/1/2016
- Trans Date: 11/30/2016
- Act#-4: 8773
- Name: TRAVEL
- Employee Id: 3000X
- Merchant: HAMPTON INN BIRMINGHAM
- Billing Amount: 16.28
- Billing Currency: USD

**Row 2**
- Date: 12/9/2016
- Trans Date: 11/29/2016
- Act#-4: 8773
- Name: TRAVEL
- Employee Id: 3000X
- Merchant: HILTON GARDEN INN LC FD
- Billing Amount: 2,311.16
- Billing Currency: USD

**Actions**
- Click to display icons
- Click on the blue shaded area
### Transaction Details for Account Number: XXXX-XXXX-XXXX-3965

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date</td>
<td>11/12/15</td>
</tr>
<tr>
<td>Reference Number</td>
<td>2444332036800071473078</td>
</tr>
<tr>
<td>Amount</td>
<td>235.28 USD</td>
</tr>
<tr>
<td>Merchant</td>
<td>USPS PO 0127020310</td>
</tr>
<tr>
<td>Account Transaction ID</td>
<td>72377011</td>
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</tbody>
</table>

**Merchant Information**

**Billing Information**

**Sign Off History**

**Flags & Notes**

- Reviewed: 
- Approved: 
- Sales Tax Not Billed: 
- Sales Tax $0.00

**Notes**

- [START ORDER FOR NEW RICHO START UP]

**Comments**

**Splits**

- Save
- Dispute
- Cancel

**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.
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.

<table>
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<th>Post Date</th>
<th>Trans Date</th>
<th>Act#-4</th>
<th>Name</th>
<th>Employee Id</th>
<th>Merchant</th>
<th>Billing Amount</th>
<th>Billing Currency</th>
<th>Envelope</th>
<th>Split</th>
<th>Disputed</th>
<th>Receipt?</th>
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</thead>
<tbody>
<tr>
<td>711885</td>
<td></td>
<td></td>
<td>12/1/2016</td>
<td>11/30/2016</td>
<td>8773</td>
<td>TRAVEL</td>
<td></td>
<td>HAMPTON INN BIRMINGHAM</td>
<td>16.29</td>
<td>USD</td>
<td></td>
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<td></td>
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<td>2311.16</td>
<td>USD</td>
<td></td>
<td></td>
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</tr>
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</table>
**Complete reviewed transaction will look like this and will be ready for final approval.**

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<tbody>
<tr>
<td>711865</td>
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<td>3015</td>
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**Travel Information**

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