Purchasing Cardholder Functions

Cardholder is responsible for logging in to Intersect to attach receipt(s) to each transaction. At the Homepage, Cardholder can access transactions by clicking on Quick Links – Manage Transactions and Unreviewed Transactions. Then, go to Transaction Maintenance>Transaction Management, find the transaction and attach receipt(s). After receipt(s) is attached, Cardholder shall sign off on each transaction by clicking the Rev (Review) checkbox.

After navigating to Transaction Maintenance>Transaction Management, the Cardholder can enter “search” to view all of his or her transactions or enter Search Criteria to only see transactions that are “not reviewed” by the Cardholder – meaning the Cardholder has not clicked the “Rev” check box.

The Cardholder can also examine the transaction search criteria by billing cycle, periods of time or custom date range.
Once a Cardholder brings up a transaction, it will look like this:

The Cardholder is able to change any coding, and does have the ability to enter something in the notes field. The Cardholder will click a transaction row to be prompted to perform an action. (Click on a transaction to see the header bar at the top.)
By clicking the Transaction Details icon, the Cardholder can attach a receipt. The screen below loads the receipt(s).

Mark transaction as reviewed

↑ (upload receipt here)

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... No file selected.

Upload Receipt(s) Close
Cardholder can click on a transaction as reviewed and view the uploaded receipt. Click “next” to go to other transactions.
If there is no receipt and a Cardholder clicks review, he or she will receive the following error.

Cardholder can alternatively come back to the main transaction page on Transaction Maintenance>Transaction Management and select the "Rev" checkbox to view a receipt.

The Department Admin and Reviewer can also view and approve Cardholder’s statements under Transaction Maintenance>Statements.