



PEX CARDHOLDER BASICS

at Westside

PEX CARD

You or your ministry will be issued a Pex Card if you are responsible for regular purchases for Westside.

PRELOADED - Ministry Card

Your card will be preloaded with your ministry's monthly budgeted funds. Any unused funds will roll over to the following month.

PRELOADED - Non-Ministry (Staff) Card

Your card will be preloaded with funds to maintain a defined balance. For example, if your defined balance is set to \$200, your card will reload each month to maintain a \$200 balance.

STEPS TO MAKE PURCHASES

1. Download app <https://ch.pexcard.com/>
2. Review [App Overview](#)
3. Make a purchase using your PEX card ([run as credit](#)).
4. Log into app and attach a receipt to a transaction record:
(See the [HOW TO article](#) for more detail instructions.)
 - a. Take a picture of the receipt
 - b. Locate the transaction
 - c. Attach the image and upload it - one file per transaction
5. Add a transaction tag to identify the budget line item the purchase should be charged to.
 - a. Your card will not be reloaded if you have failed to add tags to previous purchases.
 - b. Please be aware the notes tab is for reference only, it is not the transaction tag.