Procurement Job Aid

PR349_PCard Merchant to Preferred Supplier (VDOT)

PCard Merchant to Preferred Supplier Overview

When a Purchasing Card (PCard) is used, the merchant name is loaded daily into Cardinal from the Card Issuer (e.g., Bank of America (BOA)) file. In order to capture Small, Women, and Minority-owned Business (SWAM) and related expenditures made using a PCard, a PCard merchant must be set up as a **Preferred Supplier**. Identifying merchants as **Preferred Suppliers** allows Cardinal to capture and report on SWAM and related expenditure data on any PCard purchases made from them.

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PCard New Merchant Query and Preferred Supplier Page

The objective is to identify new PCard merchants using the **New PCard Supplier Report** query and to move them to the **Preferred Suppliers** list for accurate reporting using the **Preferred Suppliers** page.

New PCard Supplier Report - Query

The **New PCard Supplier Report** query identifies new PCard merchants/suppliers, and related information, that need to be updated in Cardinal as **Preferred Suppliers** for future reporting. For more detailed information about reports, queries, and online inquires, see the Web-Based Training (WBT) course titled **Cardinal NAV220: Introduction to Cardinal Financial Reporting** located on the Cardinal website in **Web-Based Training (FIN)** under **Learning**.
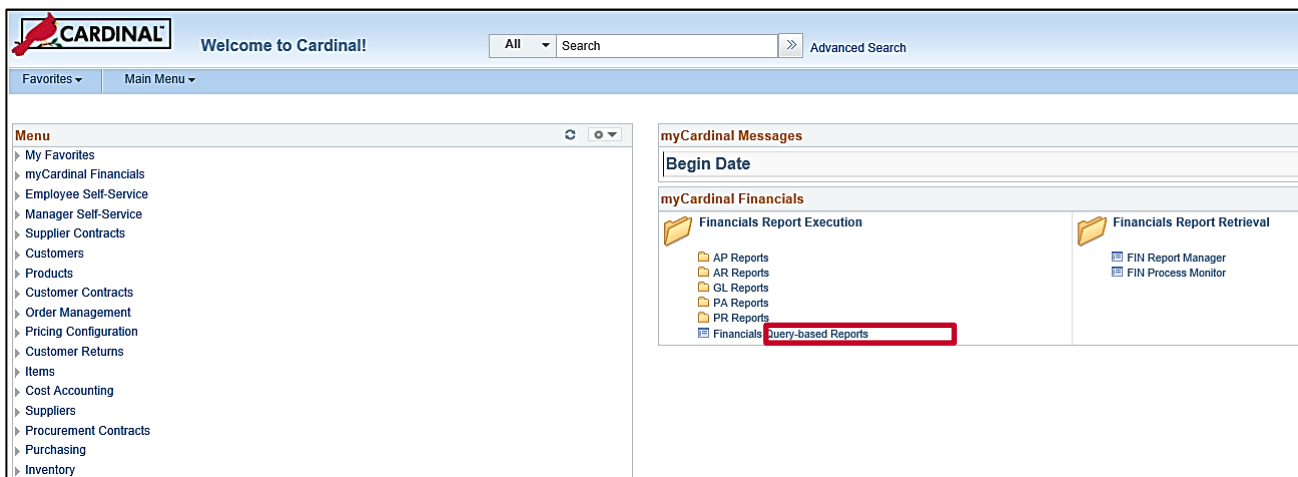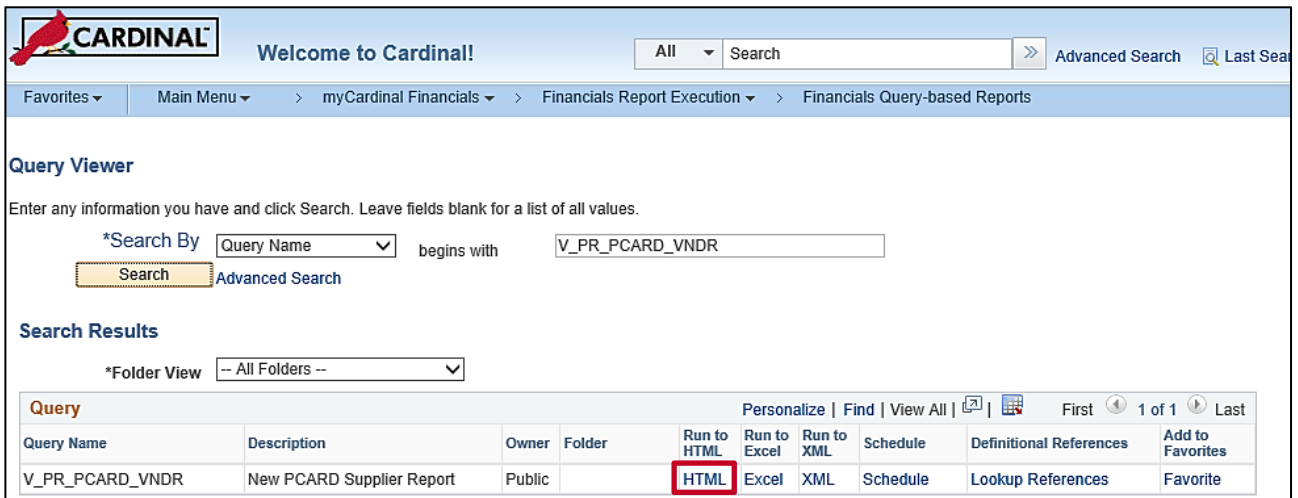

1.   To run the **New PCard Supplier Report** query, from the Cardinal Financial **Home** page, click the **Financial Query-based Reports** hyperlink in the **myCardinal Financials** section.
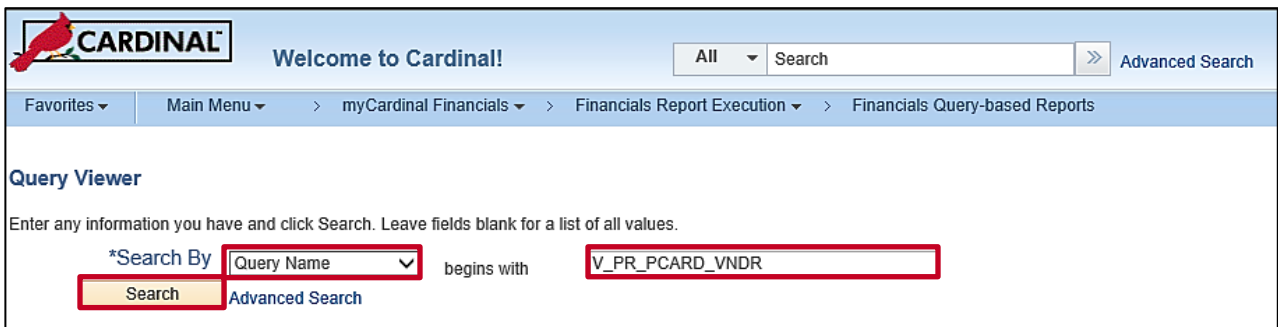
2.   The **Query Viewer** page displays. You can also navigate to the **Query Viewer** page using the following path:

   Main Menu > Reporting Tools > Query > Query Viewer

3.   In the **Search By** drop-down, choose **Query Name**.

4.   Enter the query name of **V_PR_PCARD_VNDR**.

5. Click the **Search** button. The search results display on the same page below the search criteria entered.
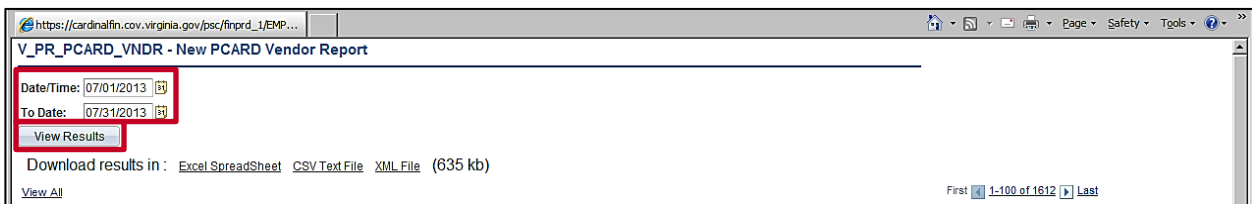
6. To run the **New PCard Supplier Report** query to a new web page, click the **HTML** hyperlink. A new web page opens.
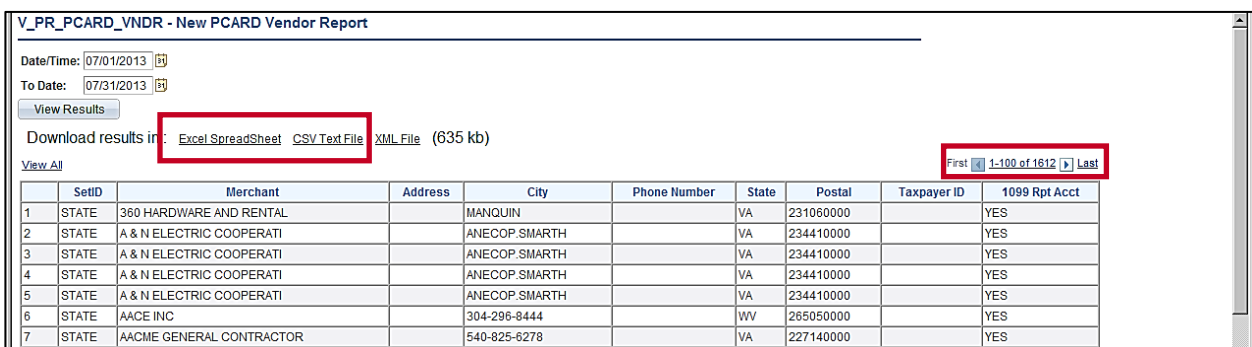
7. Enter a date range using the **Date/Time** and **To Date** fields.

8. Click the **View Results** button. The page updates with the **New PCard Supplier Report** query results.

9. To review the results, scroll through the data pages using the arrow icons.

10. The **New PCard Supplier Report** query can also be downloaded as **Excel** or **CSV** by clicking the respective hyperlink.

Preferred Suppliers – Page
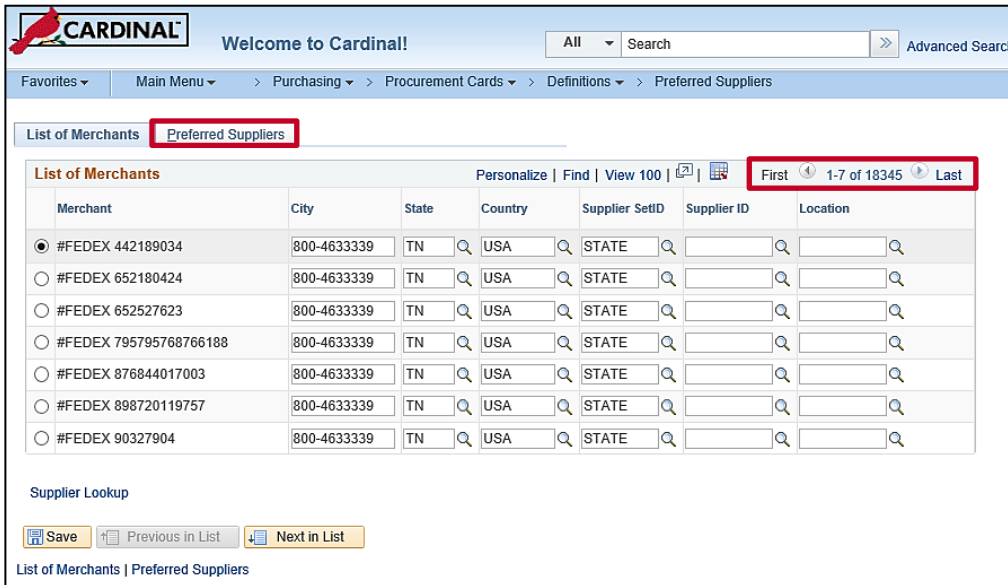
On the **Preferred Suppliers** page, you can see which of the new PCard merchants identified in the query above are not set up as **Preferred Suppliers**. From this page, you can set the merchant up as preferred.

1.   To access the **Preferred Suppliers** page, navigate to the **Preferred Supplier** page using the following path:

     Main Menu > Purchasing > Procurement Cards >Definitions > Preferred Suppliers

2.   On the **Find an Existing Value** tab, enter the Merchant to search for a specific merchant. You can also leave this field blank to search for all merchants.

3.   Click the **Search** button. The **List of Merchants** tab displays.

4. The **List of Merchants** tab displays all new PCard merchants. If you have searched for all merchants, there could be many pages. You can use the arrow icons to navigate through all the results.

5. Click the **Preferred Suppliers** tab.

6. The **Preferred Suppliers** list displays. This list is a subset of the **List of Merchants** on the previous tab and it shows only those merchants who have been identified in Cardinal as a Preferred Supplier.

7. Compare the **New PCard Supplier Report** query results from above to the **Preferred Suppliers** list to identify new PCard merchants who need to be added to the **Preferred Suppliers** list.

8. Click the **List of Merchants** tab.

9. From the **List of Merchants** tab, locate the merchant(s) to be added as Preferred Suppliers:
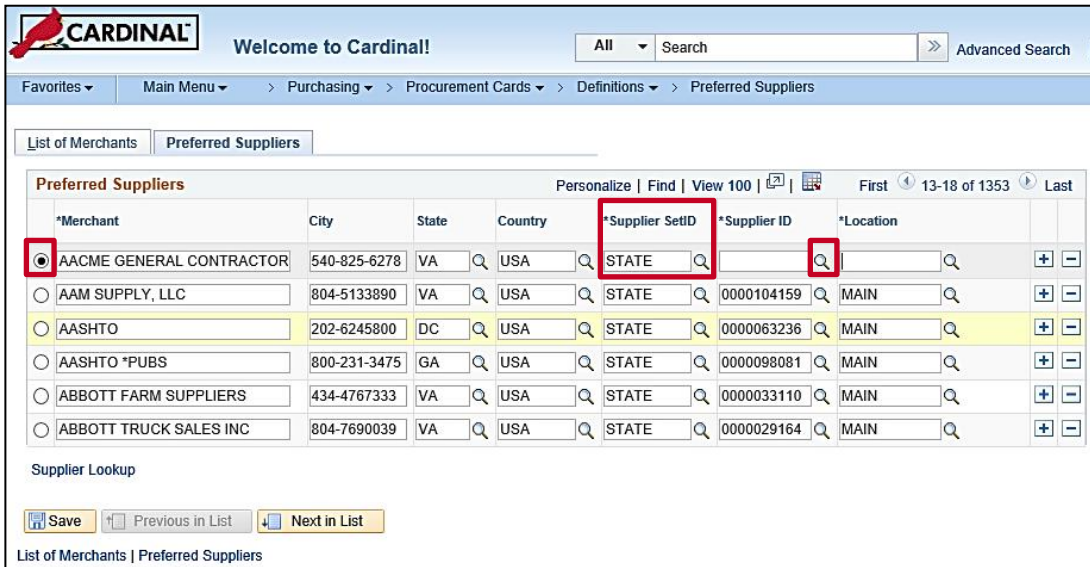
    a. Click the **Find** link.
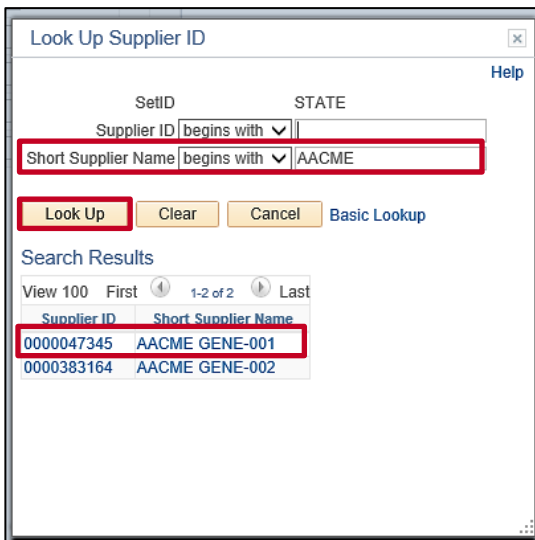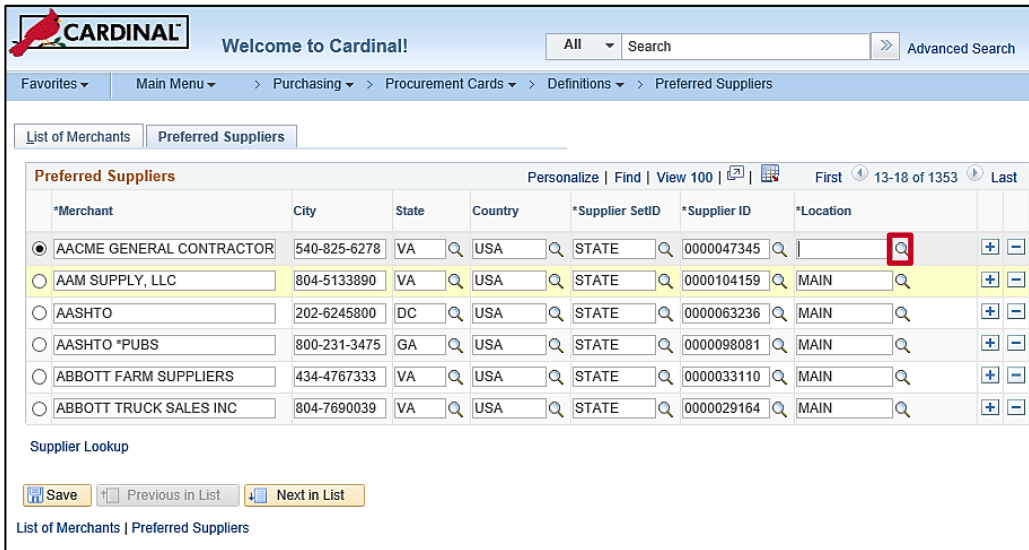

    b. Enter identifying details about the new PCard merchant, such as name or number, and click **OK**.

10. Click the **radio** button next to the row with the new Merchant.

11. Make sure the **Supplier SetID** = **State**. If it is not, you must change it before moving forward.

12. Click the **Supplier ID** lookup magnifying glass.

13. Enter either the **Supplier ID** or **Short Supplier Name** to initiate a search for this supplier. You may change the operator from **begins with** to **contains** to help with the search.

14. Click the **Look Up** button.

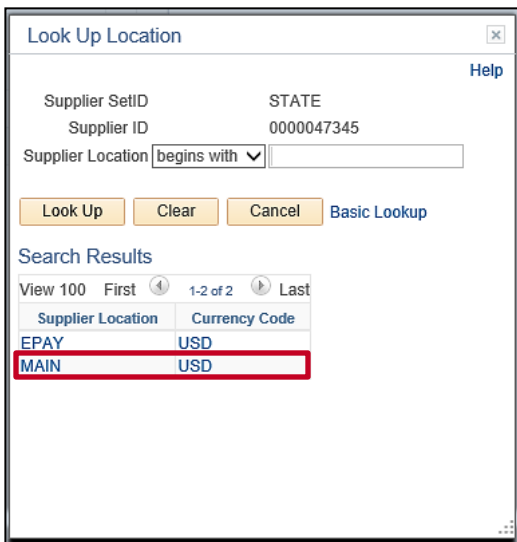15. Click the selected **Supplier ID** hyperlink.

16. The **Supplier ID** field is populated.

17. Click the **Location** look up magnifying glass.

18. Click the **Supplier Location** hyperlink.

19. The **Location** field is populated.

20. Click the **Save** button.

21. The selected merchant is now on the **Preferred Suppliers** listing and the quantity of Preferred Suppliers has increased by one.

22. Repeat the process for all remaining new PCard merchants.