PR349 PCard Merchant to Preferred Supplier (VDOT Only)

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.

This Job Aid shows how to identify new PCard merchants using the **New PCard Supplier Report** query and move them to the Preferred Suppliers list for accurate reporting using the **Preferred Suppliers** page.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the process within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History

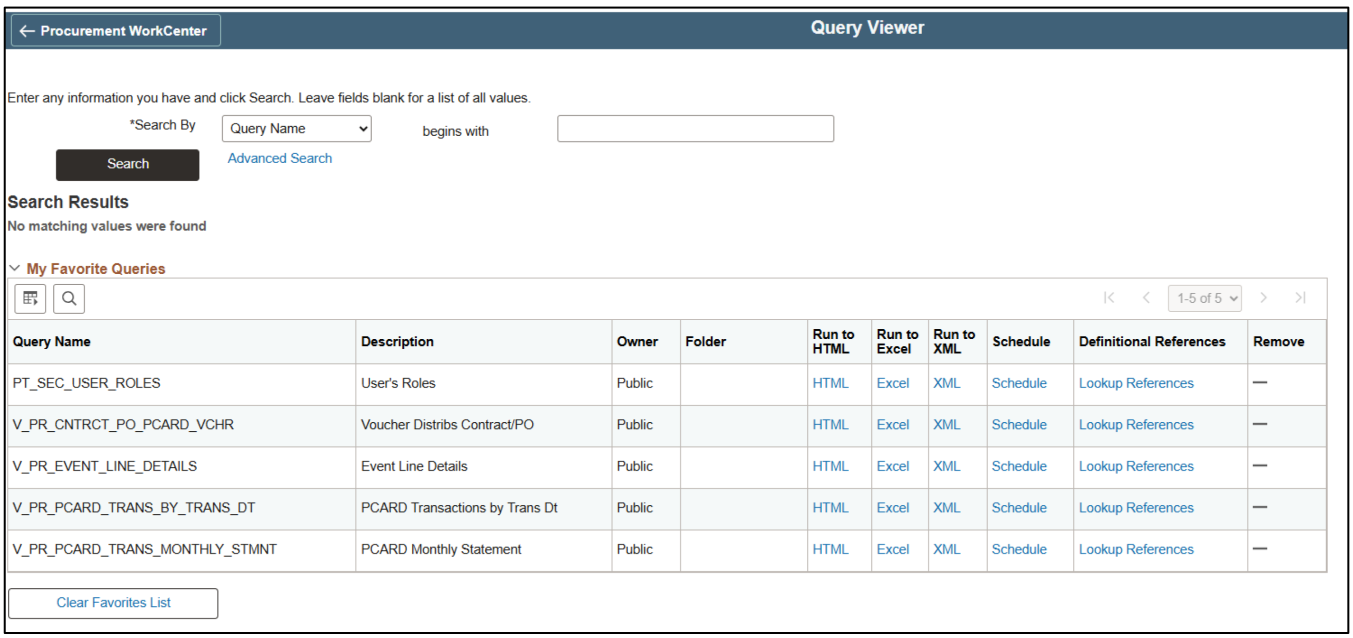
Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
12/14/2022	Baseline.

New PCard Supplier Report Query

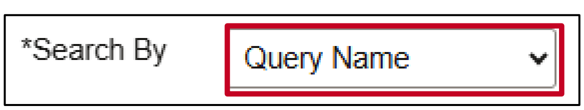
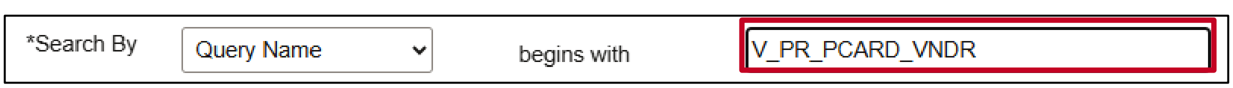
The **New PCard Supplier Report** query identifies new PCard merchants/suppliers, and related information, that need to be updated in Cardinal as Preferred Suppliers for future reporting. For more detailed information about reports, queries, and online inquiries, see the Web-Based Training (WBT) course **Cardinal - NAV220 Introduction to Cardinal Financial Reporting** in the Commonwealth of Virginia Learning Center (COVLC).

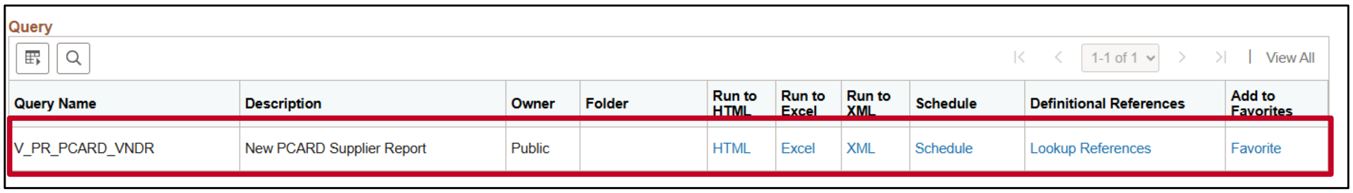
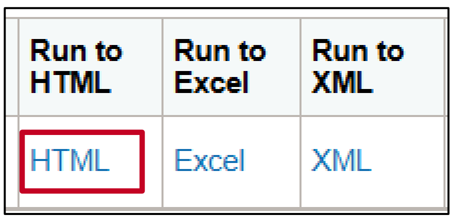
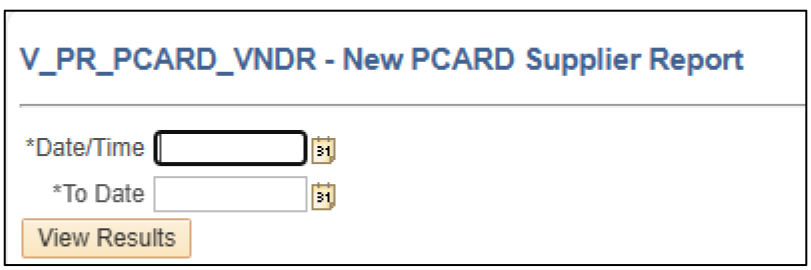
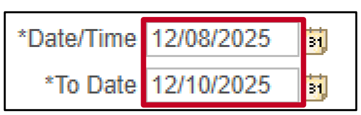
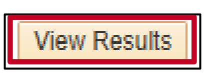
Step	Action
1.	Navigate to the **Query Viewer** page using the following path: **NavBar > Menu > Reporting Tools > Query > Query Viewer**

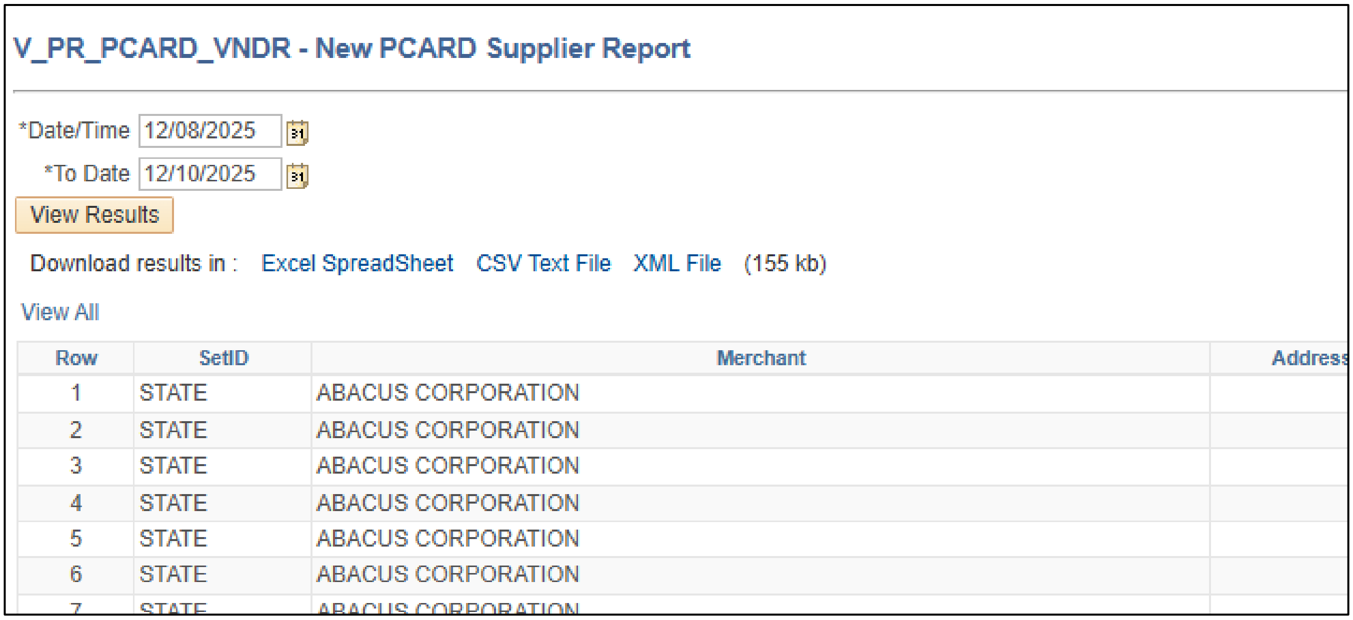
The **Query Viewer** page displays.



Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Definitional References	Remove
PT_SEC_USER_ROLES	User's Roles	Public		HTML	Excel	XML	Schedule	Lookup References	—
V_PR_CNTRCT_PO_PCARD_VCHR	Voucher Distribs Contract/PO	Public		HTML	Excel	XML	Schedule	Lookup References	—
V_PR_EVENT_LINE_DETAILS	Event Line Details	Public		HTML	Excel	XML	Schedule	Lookup References	—
V_PR_PCARD_TRANS_BY_TRANS_DT	PCARD Transactions by Trans Dt	Public		HTML	Excel	XML	Schedule	Lookup References	—
V_PR_PCARD_TRANS_MONTHLY_STMNT	PCARD Monthly Statement	Public		HTML	Excel	XML	Schedule	Lookup References	—

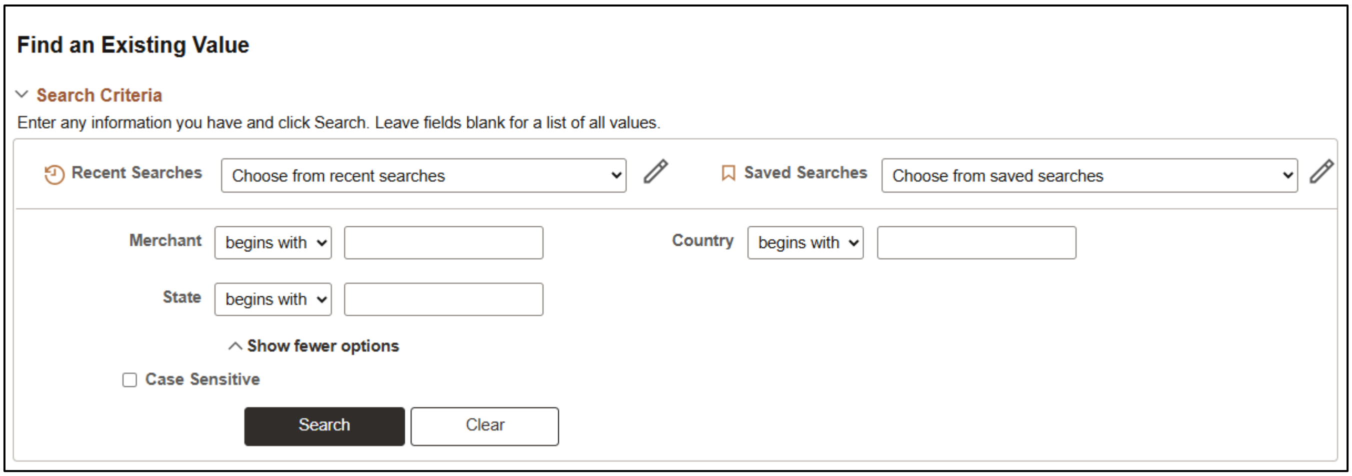
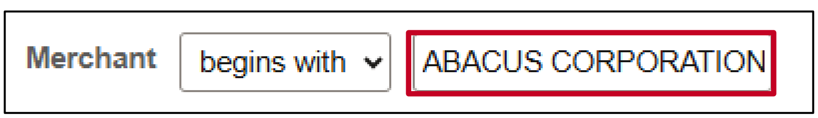
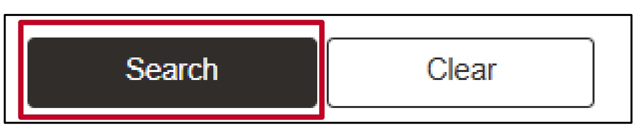
Step	Action
2.	Click the **Search By** drop-down button and choose “Query Name”. 
3.	Enter the query name of V_PR_PCARD_VNDR. 

Step	Action
4.	Click the **Search** button. 
The search results display on the same page below the search criteria entered.  Query 1-1 of 1 View All Query Name | Description | Owner | Folder | Run to HTML | Run to Excel | Run to XML | Schedule | Definitional References | Add to Favorites V_PR_PCARD_VNDR | New PCARD Supplier Report | Public | | HTML | Excel | XML | Schedule | Lookup References | Favorite	
5.	Click the **HTML** link. 
A new browser opens and displays the **New PCard Supplier Report** query.  	
6.	Enter a date range using the **Date/Time** and **To Date** fields. 
7.	Click the **View Results** button. 

Step	Action
	The page refreshes and displays the **New PCard Supplier Report** query results. 
8.	To review the results, scroll through the data pages using the arrow icons. 
	The **New PCard Supplier Report** query can also be downloaded as an Excel or CSV file by clicking the respective link. 

Identifying a Supplier as Preferred

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.

Step	Action
1.	Navigate to the **Preferred Supplier** page using the following path: **NavBar > Menu > Purchasing > Procurement Cards > Definitions > Preferred Suppliers**
The **Preferred Suppliers Find an Existing Value** page displays. 	
2.	Enter a merchant name from the **New PCard Supplier Report** query in the **Merchant** field. 
	Leaving the **Merchant** field blank will search for all merchants.
3.	Click the **Search** button. 

Step	Action

The page refreshes with a list of results in the **Search Results** section. If there is only one search result, the **Preferred Suppliers** page displays with the **List of Merchants** tab open by default.

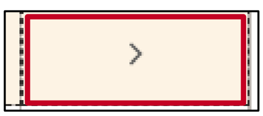
Search Results

2 results - Merchant "ABACUS CORPORATION"

1-2 of 2 | View All

Merchant	Country	State	
ABACUS CORPORATION	USA	MD	>
Abacus Corporation	USA	MD	>

4. Click the **Arrow** icon (**>**) next to the applicable search result row.



To open a complete list, click the **Arrow** icon (**>**) next to the "blank" search result row.

Merchant	Country	State	
(blank)	(blank)	(blank)	>

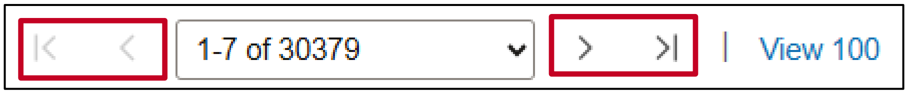
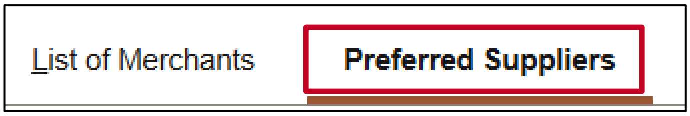
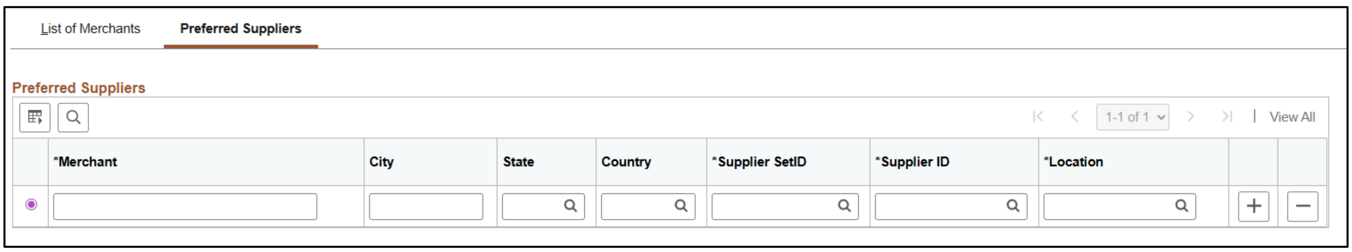
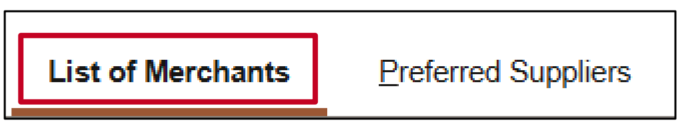
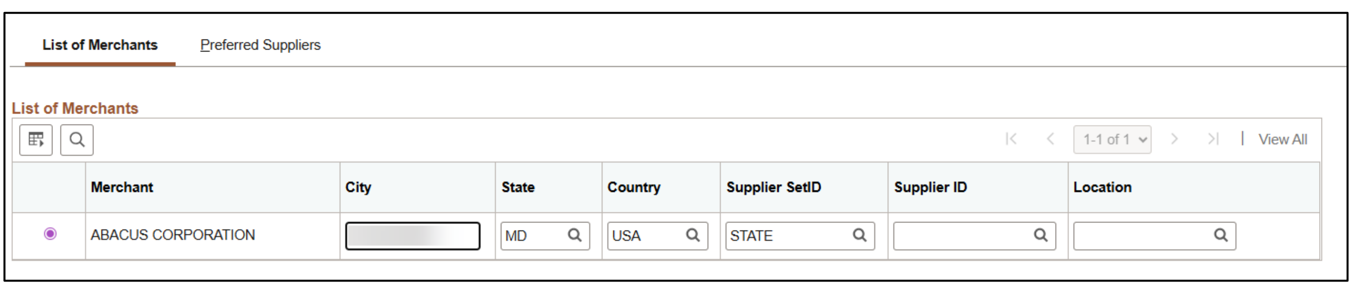
The **Preferred Suppliers** page displays with the **List of Merchants** tab open by default.

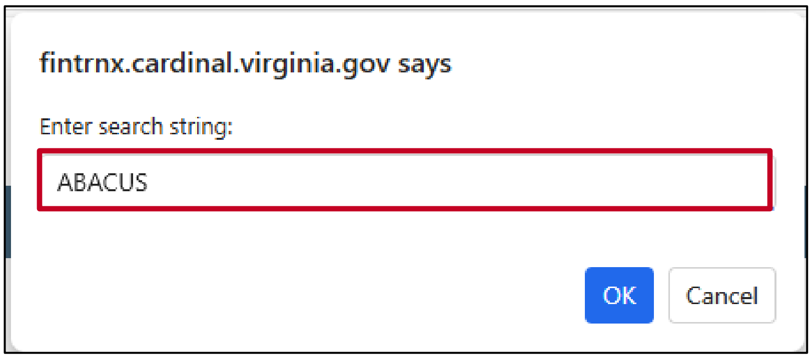
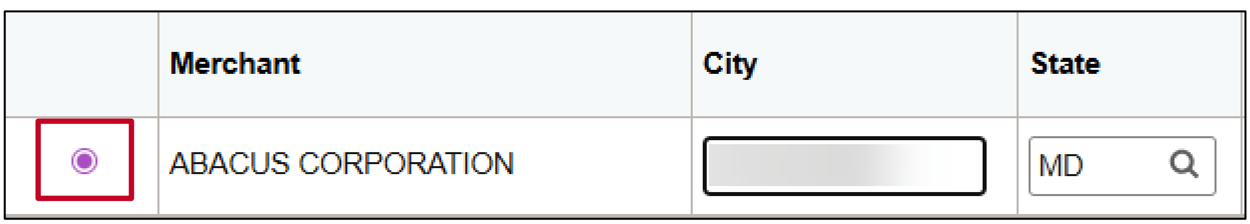
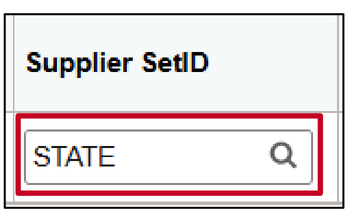
List of Merchants | Preferred Suppliers

List of Merchants

1-1 of 1 | View All

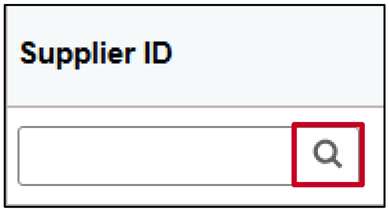
	Merchant	City	State	Country	Supplier SetID	Supplier ID	Location
◉	ABACUS CORPORATION		MD	USA	STATE		

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5.</td><td>Use the Arrow icons (>, >|) to navigate through all the results, if applicable.
</td></tr>
<tr><td>6.</td><td>Click the Preferred Suppliers tab.
</td></tr>
<tr><td colspan="2">The Preferred Suppliers tab displays.
</td></tr>
<tr><td></td><td>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.</td></tr>
<tr><td>7.</td><td>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.</td></tr>
<tr><td>8.</td><td>Click the List of Merchants tab.
</td></tr>
<tr><td colspan="2">The List of Merchants tab displays
</td></tr>
<tr><td></td><td>If working with a complete list, perform Steps 9 - 11 to locate a merchant to be added as a Preferred Supplier. If working with an individual search result, proceed to Step 12.</td></tr>
</table>

Step	Action
9.	Click the **Find** icon. 
10.	Enter identifying details about the new PCard merchant, such as name or number in the **Enter search string** field. 
11.	Click the **OK** button. 
12.	Select the **Merchant** radio button next to the row of the applicable new merchant. 
13.	Confirm the **Supplier SetID** field is set to "State". If it is not, set it to "State" before moving forward. 

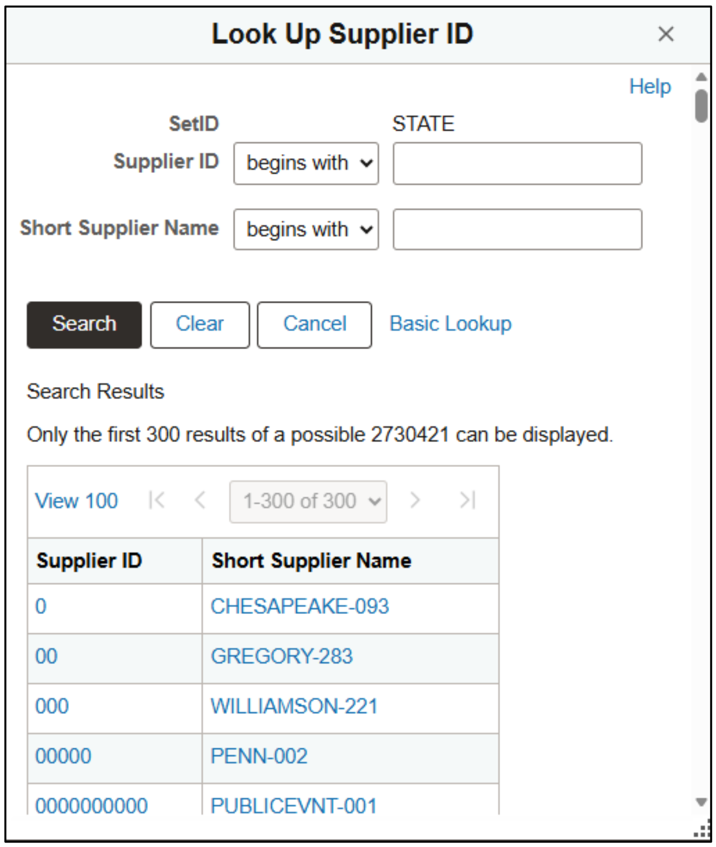
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14.</td><td>

Click the **Supplier ID Look up** icon.



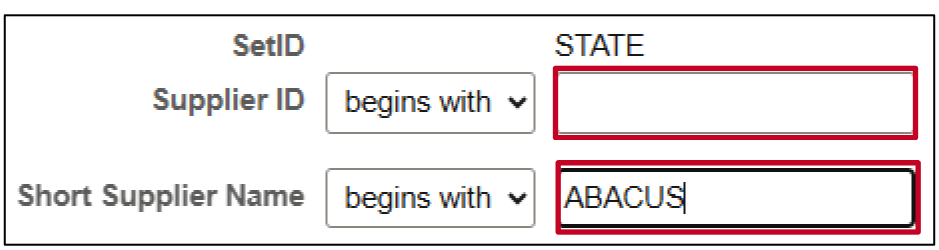
</td></tr>
<tr><td colspan="2">

The **Look Up Supplier ID** page opens in a pop-up window.

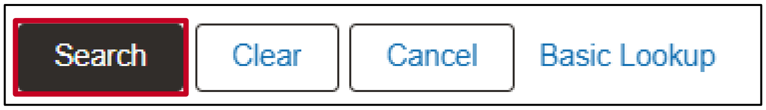
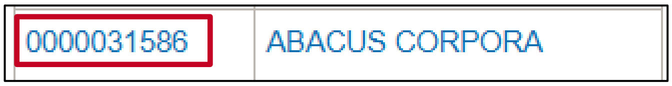
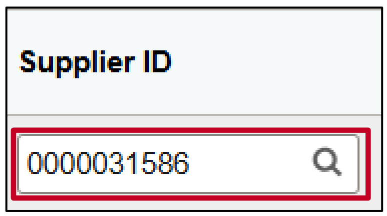
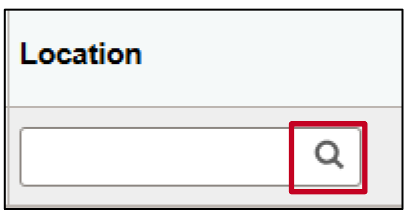


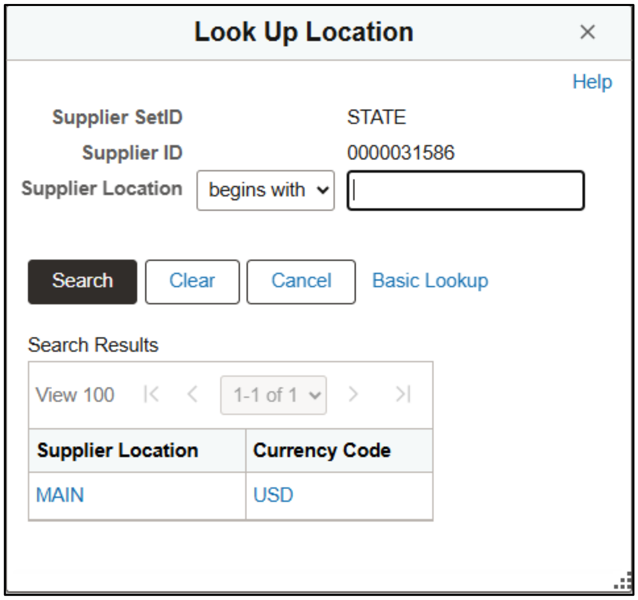
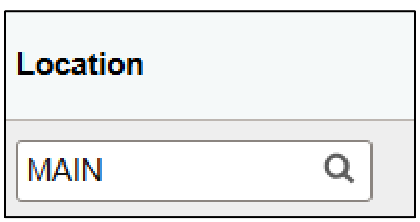
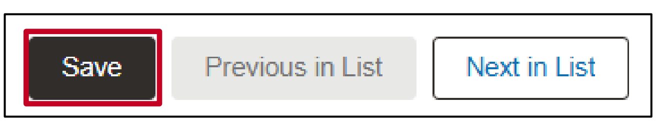
</td></tr>
<tr><td>15.</td><td>

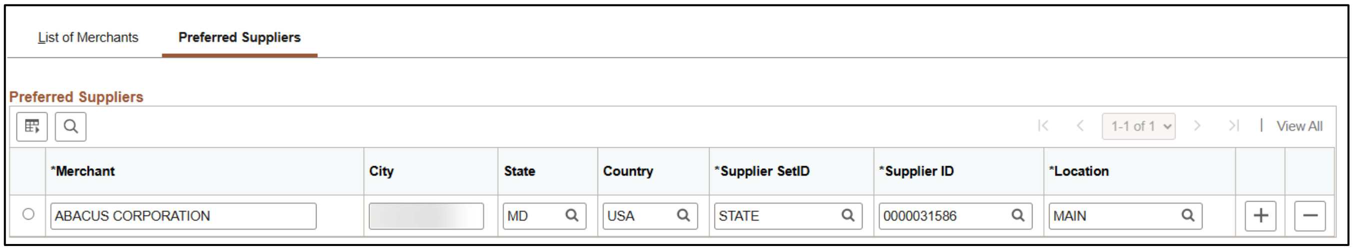
Enter a **Supplier ID** or **Short Supplier Name** to initiate a search for this Supplier. Change the operator from "Begins with" to "Contains", if needed, to help with the search.



</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16.</td><td>Click the Search button.

</td></tr>
<tr><td>17.</td><td>Click the applicable Supplier ID link.

</td></tr>
<tr><td colspan="2">The List of Merchants tab displays, with the Supplier ID field populated.

</td></tr>
<tr><td>18.</td><td>Click the Location Look up icon.

</td></tr>
</table>

Step	Action
The **Look Up Location** page displays in a pop-up window. 	
19.	Click the applicable **Supplier Location** link. 
The **List of Merchants** tab displays, with the **Location** field populated. 	
20.	Click the **Save** button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td colspan="2">The selected merchant is now on the Preferred Suppliers tab and the quantity of Preferred Suppliers has increased by one.

</td></tr>
<tr><td>21.</td><td>Repeat the process for all remaining new PCard merchants.</td></tr>
</table>