

### About PCard Merchant to Preferred Vendor Set-Up

When the PCard is used, the Merchant name is loaded into Cardinal from the Bank of America (BOA) daily file. In order to capture SWAM and related spend, the merchants need to be set up as **Preferred Vendors**.

This query is useful to identify new PCard merchants/vendors and related information to be updated within Cardinal as **Preferred Vendors** for future reporting.

#### 1 Navigate to: **Reporting Tools > Query > Query Viewer**



The screenshot shows the Cardinal Query Viewer interface. The search field is populated with 'V\_PR\_PCARD\_VNDR' and the 'Search' button is highlighted with a red box. The interface includes a navigation menu at the top and a search prompt: 'Enter any information you have and click Search. Leave fields blank for a list of all values.'

#### 2 Enter query name: **V\_PR\_PCARD\_VNDR**

#### 3 Click the **Search** button.



The screenshot shows the search results for the query 'V\_PR\_PCARD\_VNDR'. The results table has the following columns: Query Name, Description, Owner, Folder, Run to HTML, Run to Excel, Run to XML, Schedule, and Add to Favorites. The 'HTML' hyperlink in the 'Run to HTML' column is highlighted with a red box.

Query Name	Description	Owner	Folder	Run to HTML	Run to Excel	Run to XML	Schedule	Add to Favorites
V_PR_PCARD_VNDR	New PCARD Vendor Report	Public		<a href="#">HTML</a>	Excel	XML	Schedule	Favorite

#### 4 Click the **HTML** hyperlink.



# Procurement Job Aid

## PCard Merchant to Preferred Vendor

https://cardinalfn.gov/virginia.gov/psc/finprd\_1/EMP...  
V\_PR\_PCARD\_VNDR - New PCARD Vendor Report  
Date/Time: 07/01/2013  
To Date: 07/31/2013  
**View Results**  
Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (635 kb)  
[View All](#) First 1-100 of 1612 Last

5 Enter dates as applicable and click the **View Results** button.

V\_PR\_PCARD\_VNDR - New PCARD Vendor Report  
Date/Time: 07/01/2013  
To Date: 07/31/2013  
[View Results](#)  
Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (635 kb)  
[View All](#) First 1-100 of 1612 Last

	SetID	Merchant	Address	City	Phone Number	State	Postal	Taxpayer ID	1099 Rpt Acct
1	STATE	360 HARDWARE AND RENTAL		MANQUIN		VA	231060000		YES
2	STATE	A & N ELECTRIC COOPERATI		ANECOP.SMARTH		VA	234410000		YES
3	STATE	A & N ELECTRIC COOPERATI		ANECOP.SMARTH		VA	234410000		YES
4	STATE	A & N ELECTRIC COOPERATI		ANECOP.SMARTH		VA	234410000		YES
5	STATE	A & N ELECTRIC COOPERATI		ANECOP.SMARTH		VA	234410000		YES
6	STATE	AACE INC		304-296-8444		WV	265050000		YES
7	STATE	AACME GENERAL CONTRACTOR		540-825-6278		VA	227140000		YES

6 New PCard Vendor report is shown.

7 **NOTE:** Report can be downloaded as Excel, CSV and XML.

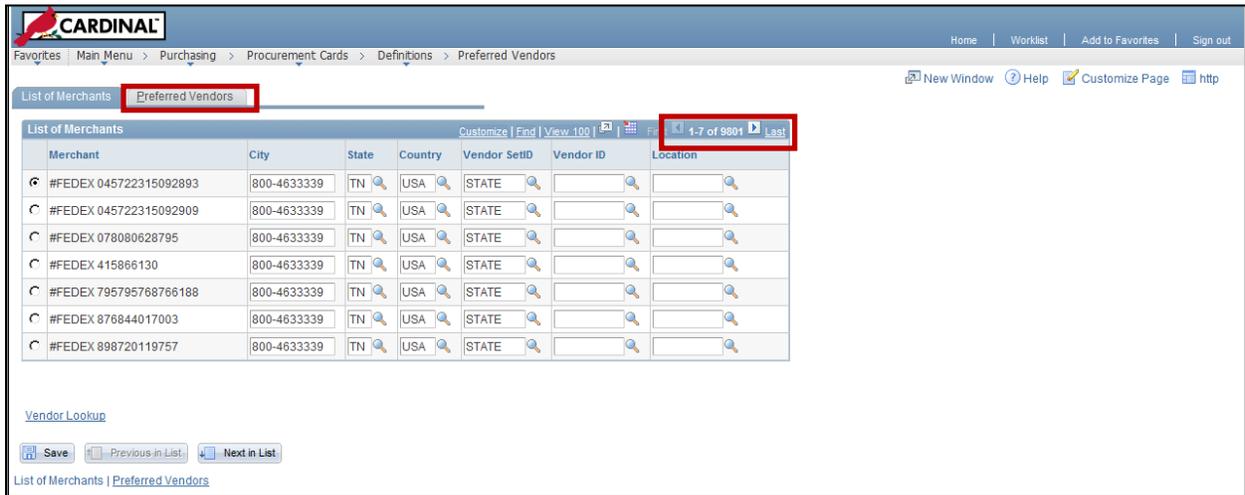
CARDINAL  
Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Preferred Vendors  
Home | Worklist | Add to Favorites | Sign out  
New Window | Help | http  
**Preferred Vendors**  
Enter any information you have and click Search. Leave fields blank for a list of all values.  
**Find an Existing Value**  
Maximum number of rows to return (up to 300): 300  
Merchant: begins with  
Country: begins with  
State: begins with  
 Case Sensitive  
**Search** Clear Basic Search Save Search Criteria

8 Navigate to: **Purchasing > Procurement Cards > Definitions > Preferred Vendors**

9 **Find and Existing Value** tab displays.

10 Enter Merchant or click **Search**

## PCard Merchant to Preferred Vendor



Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Preferred Vendors

New Window | Help | Customize Page | http

List of Merchants | **Preferred Vendors**

Customize | End | View: 100 | 1-7 of 9801 | Last

Merchant	City	State	Country	Vendor SetID	Vendor ID	Location
#FEDEX 045722315092893	800-4633339	TN	USA	STATE		
#FEDEX 045722315092909	800-4633339	TN	USA	STATE		
#FEDEX 078080628795	800-4633339	TN	USA	STATE		
#FEDEX 415866130	800-4633339	TN	USA	STATE		
#FEDEX 795795768766188	800-4633339	TN	USA	STATE		
#FEDEX 876844017003	800-4633339	TN	USA	STATE		
#FEDEX 898720119757	800-4633339	TN	USA	STATE		

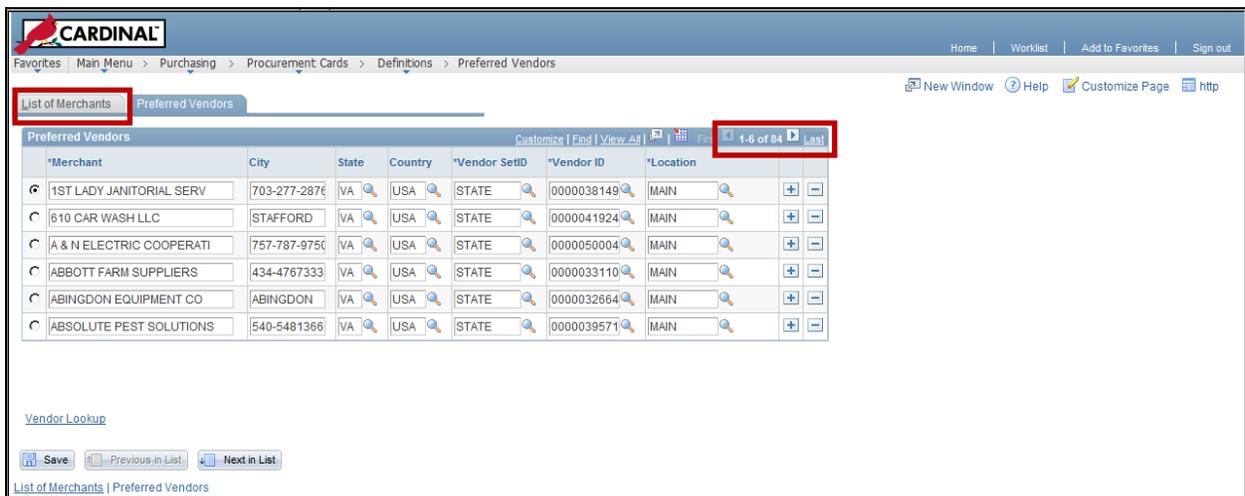
Vendor Lookup

Save | Previous in List | Next in List

List of Merchants | Preferred Vendors

**11** The **List of Merchants** tab displays all new PCARD merchants. **Note:** in this case there more than **9000** merchants on the list.

**12** Click on the **Preferred Vendors** tab



Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Preferred Vendors

New Window | Help | Customize Page | http

List of Merchants | **Preferred Vendors**

Customize | End | View: All | 1-6 of 84 | Last

*Merchant	City	State	Country	*Vendor SetID	*Vendor ID	*Location
1ST LADY JANITORIAL SERV	703-277-2876	VA	USA	STATE	0000038149	MAIN
610 CAR WASH LLC	STAFFORD	VA	USA	STATE	0000041924	MAIN
A & N ELECTRIC COOPERATI	757-787-9750	VA	USA	STATE	0000050004	MAIN
ABBOTT FARM SUPPLIERS	434-4767333	VA	USA	STATE	0000033110	MAIN
ABINGDON EQUIPMENT CO	ABINGDON	VA	USA	STATE	0000032664	MAIN
ABSOLUTE PEST SOLUTIONS	540-5481366	VA	USA	STATE	0000039571	MAIN

Vendor Lookup

Save | Previous in List | Next in List

List of Merchants | Preferred Vendors

**13** The listing of **Preferred Vendors** is displayed. **NOTE:** in this case, there are **84** Preferred Vendors. The objective is to move the merchants to the Preferred Vendors list for accurate reporting.

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

## PCard Merchant to Preferred Vendor

Vendor Lookup

Save Previous in List Next in List

- 15 Locate the merchant(s) to be added as preferred vendors, from your previous query or from this list.
- 16 Click the **Find** link.

Script Prompt:  
Enter search string:  
aacme

OK  
Cancel

- 17 Enter merchant name and click **OK**.

Vendor Lookup

Save Previous in List Next in List

- 18 Select Vendor and click on the **Vendor ID** lookup icon.

Look Up

Look Up Vendor ID

SetID: STATE

Vendor ID: begins with

Short Vendor Name: begins with aacme

Look Up Clear Cancel Basic Lookup

Search Results

Only the first 300 results of a possible 97789 can be displayed. Enter more search key information and search again to reduce the number of search results.

View 100 First 1-300 of 300 Last

Vendor ID	Short Vendor Name
00000	PERM-002
0000000000	PUBLICEVNT-001
0000000001	MICRO AUDI-001
0000000002	LAND & SEA-001
0000000003	ASPECT SOF-001
0000000004	BENSON WOO-001
0000000005	SIS-USA IN-001

19 Enter **Vendor ID** or **Short Vendor Name**.

20 Click **Look Up** button.

Look Up

Look Up Vendor ID

SetID: STATE

Vendor ID: begins with

Short Vendor Name: begins with AACME

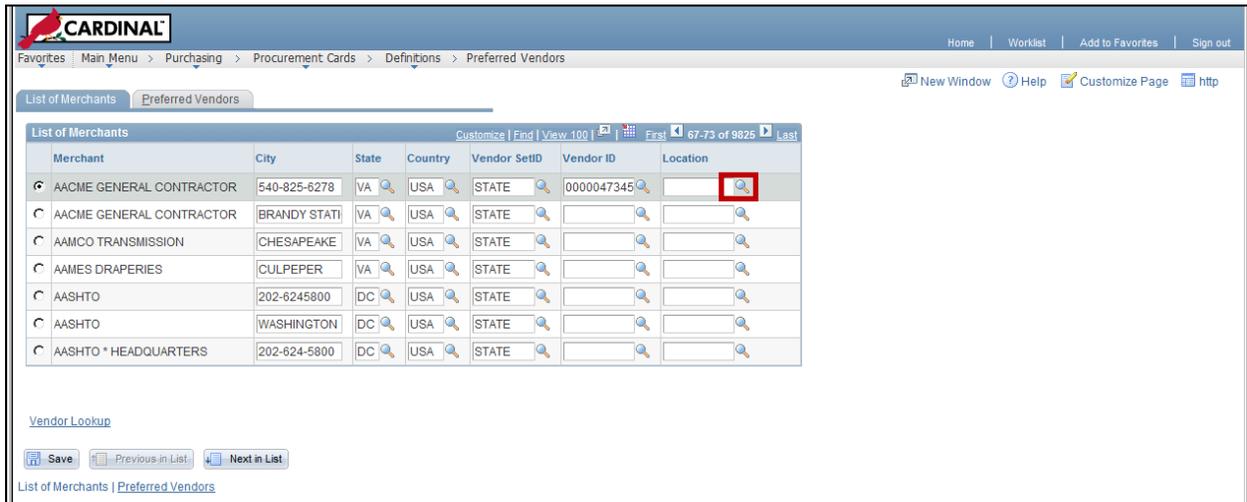
Look Up Clear Cancel Basic Lookup

Search Results

View 100 First 1 of 1 Last

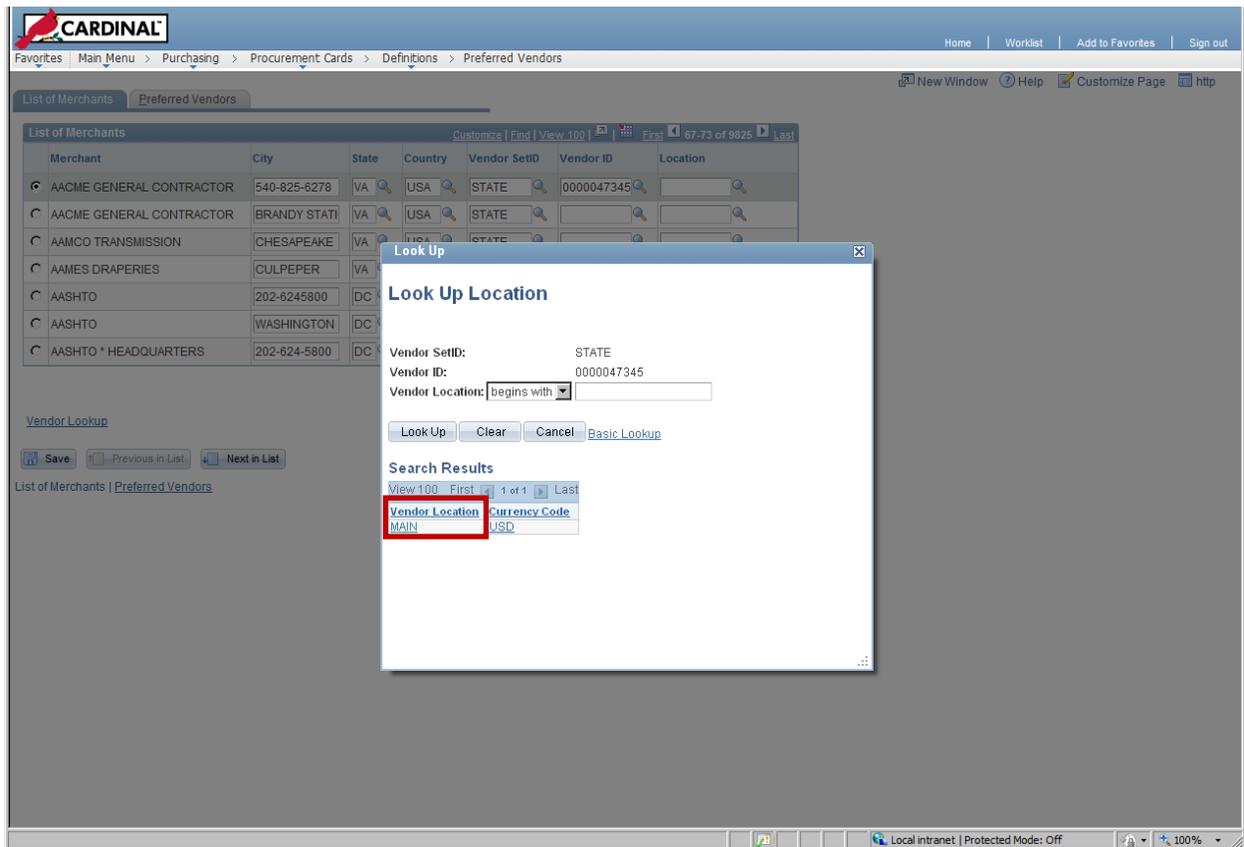
Vendor ID	Short Vendor Name
0000047345	AACME GENE-001

21 Click selected **Vendor ID** hyperlink.



**22** Vendor ID field is populated.

**23** Click the **Location** lookup icon.



**24** Click the **Vendor Location** hyperlink.



# Procurement Job Aid

## PCard Merchant to Preferred Vendor

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Preferred Vendors

New Window | Help | Customize Page | http

List of Merchants | Preferred Vendors

Merchant	City	State	Country	Vendor SetID	Vendor ID	Location
<input checked="" type="radio"/> AACME GENERAL CONTRACTOR	540-825-6278	VA	USA	STATE	0000047345	MAIN
<input type="radio"/> AACME GENERAL CONTRACTOR	BRANDY STATI	VA	USA	STATE		
<input type="radio"/> AAMCO TRANSMISSION	CHESAPEAKE	VA	USA	STATE		
<input type="radio"/> AAMES DRAPERIES	CULPEPER	VA	USA	STATE		
<input type="radio"/> AASHTO	202-6245800	DC	USA	STATE		
<input type="radio"/> AASHTO	WASHINGTON	DC	USA	STATE		
<input type="radio"/> AASHTO * HEADQUARTERS	202-624-5800	DC	USA	STATE		

Vendor Lookup

List of Merchants | Preferred Vendors

25 Click **Save**.

Home | Worklist | Add to Favorites | Sign out

Favorites | Main Menu > Purchasing > Procurement Cards > Definitions > Preferred Vendors

New Window | Help | Customize Page | http

List of Merchants | Preferred Vendors

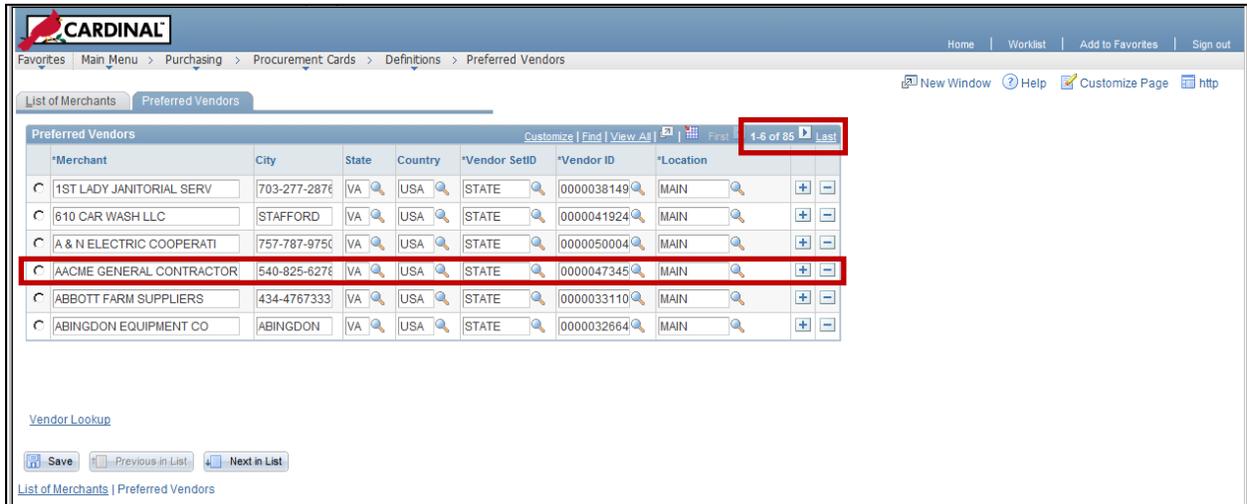
Merchant	City	State	Country	Vendor SetID	Vendor ID	Location
<input type="radio"/> #FEDEX 045722315092893	800-4633339	TN	USA			
<input type="radio"/> #FEDEX 045722315092909	800-4633339	TN	USA			
<input type="radio"/> #FEDEX 07800628795	800-4633339	TN	USA			
<input type="radio"/> #FEDEX 415866130	800-4633339	TN	USA			
<input type="radio"/> #FEDEX 795795768768188	800-4633339	TN	USA			
<input type="radio"/> #FEDEX 876844017003	800-4633339	TN	USA			
<input type="radio"/> #FEDEX 898720119757	800-4633339	TN	USA			

Vendor Lookup

List of Merchants | Preferred Vendors

26 Click the **Preferred Vendors** tab.

## PCard Merchant to Preferred Vendor



Preferred Vendors

*Merchant	City	State	Country	*Vendor SetID	*Vendor ID	*Location		
1ST LADY JANITORIAL SERV	703-277-2876	VA	USA	STATE	0000038149	MAIN	+	-
610 CAR WASH LLC	STAFFORD	VA	USA	STATE	0000041924	MAIN	+	-
A & N ELECTRIC COOPERATI	757-787-9750	VA	USA	STATE	0000050004	MAIN	+	-
AACME GENERAL CONTRACTOR	540-825-6276	VA	USA	STATE	0000047345	MAIN	+	-
ABBOTT FARM SUPPLIERS	434-4767333	VA	USA	STATE	0000033110	MAIN	+	-
ABINGDON EQUIPMENT CO	ABINGDON	VA	USA	STATE	0000032664	MAIN	+	-

Vendor Lookup

Save Previous in List Next in List

27 Selected merchant is now on the **Preferred Vendors** listing. **Note:** quantity of vendors has increased by one.

28 Repeat the process for all remaining PCard Merchants.