

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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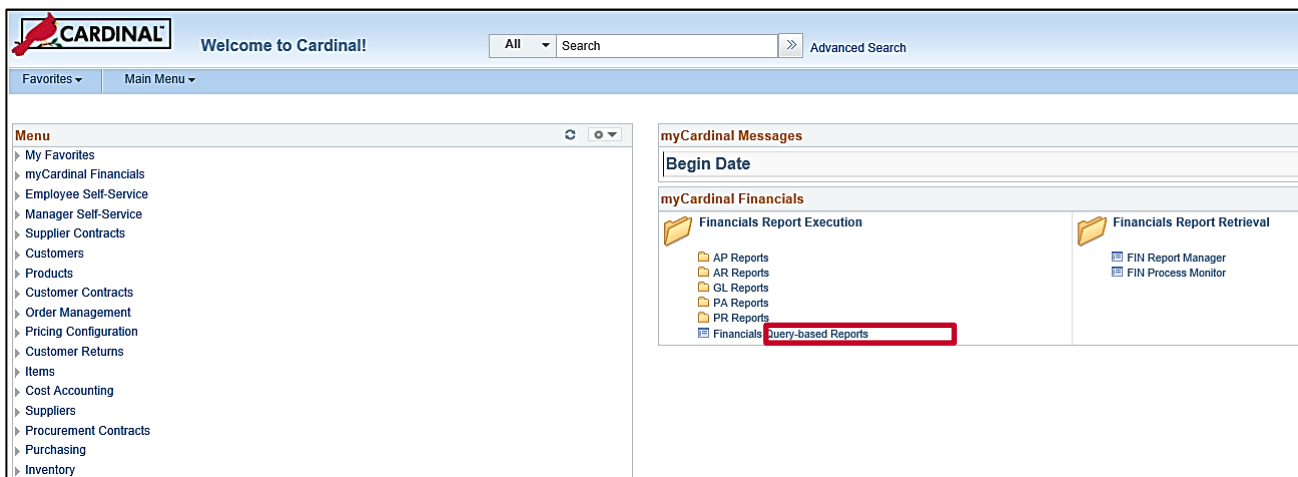
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PCard New Merchant Query and Preferred Supplier Page

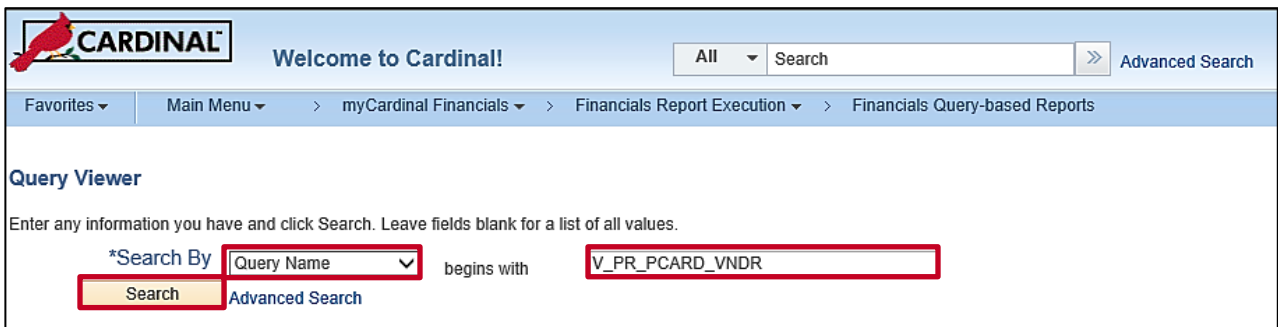
The objective is to identify new PCard merchants using the **New PCard Supplier Report** query and to move them to the **Preferred Suppliers** list for accurate reporting using the **Preferred Suppliers** page.

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**.



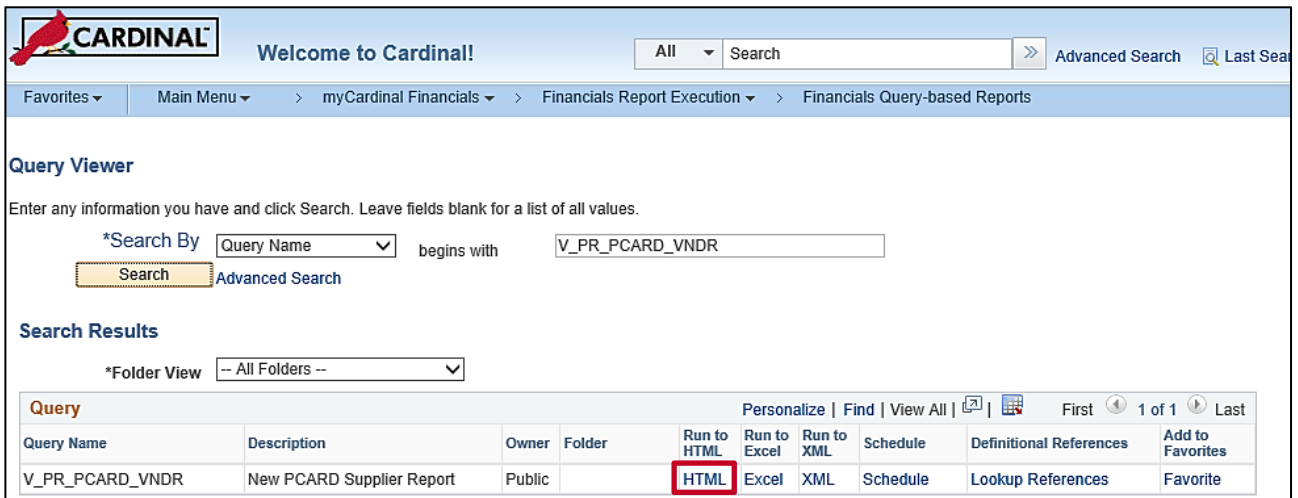
1. To run the **New PCard Supplier Report** query, from the Cardinal Financial **Home** page, click the **Financial Query-based Reports** hyperlink in the **myCardinal Financials** section.



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**.

PR349_PCard Merchant to Preferred Supplier (VDOT)

- Click the **Search** button. The search results display on the same page below the search criteria entered.



Query Viewer

Enter any information you have and click Search. Leave fields blank for a list of all values.

*Search By begins with

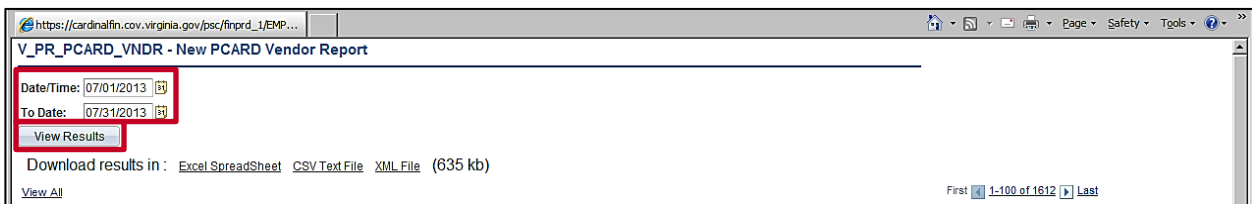
[Advanced Search](#)

Search Results

*Folder View

Query	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

- To run the **New PCard Supplier Report** query to a new web page, click the **HTML** hyperlink. A new web page opens.



V_PR_PCARD_VNDR - New PCard Vendor Report

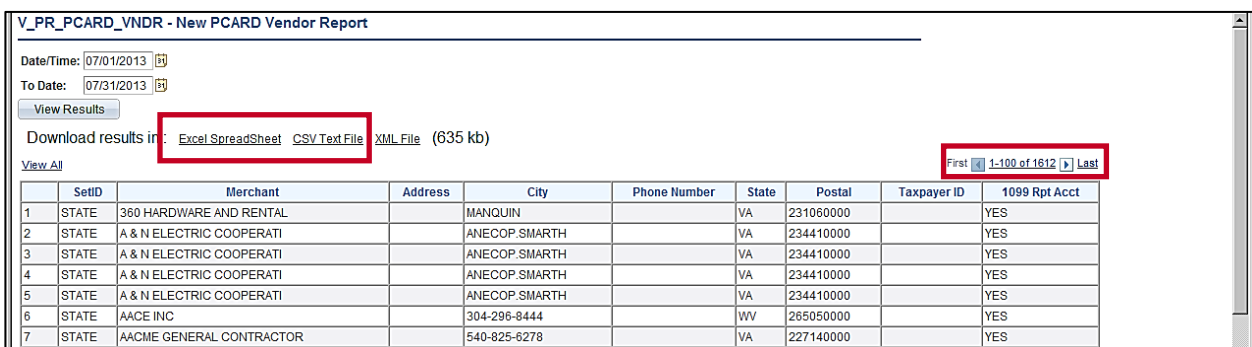
Date/Time:

To Date:

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (635 kb)

View All First Last

- Enter a date range using the **Date/Time** and **To Date** fields.
- Click the **View Results** button. The page updates with the **New PCard Supplier Report** query results.



V_PR_PCARD_VNDR - New PCard Vendor Report

Date/Time:

To Date:

Download results in: [Excel Spreadsheet](#) [CSV Text File](#) [XML File](#) (635 kb)

View All First 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

- To review the results, scroll through the data pages using the arrow icons.
- The **New PCard Supplier Report** query can also be downloaded as **Excel** or **CSV** by clicking the respective hyperlink.

Preferred Suppliers – Page

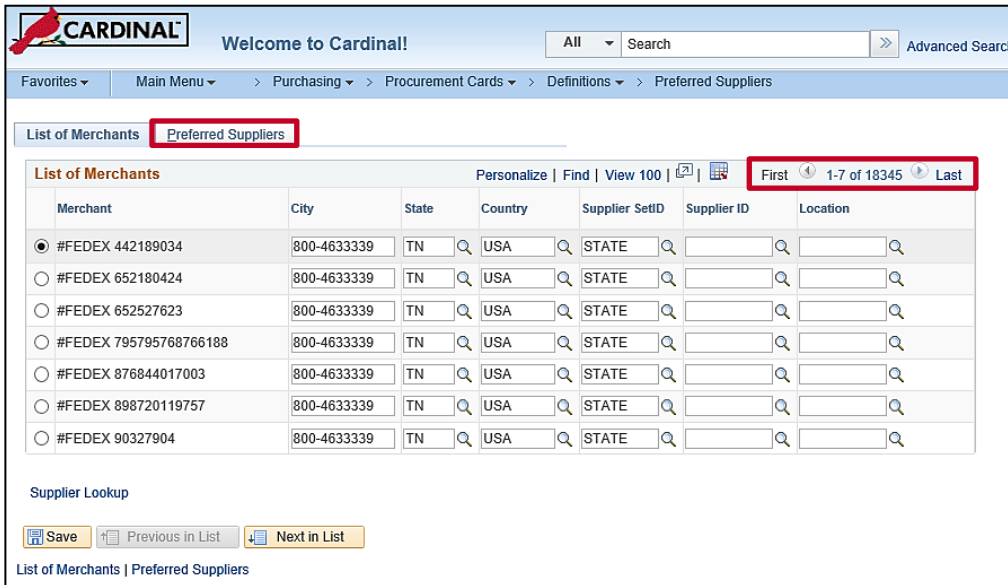
On the **Preferred Suppliers** page, you can see which of the new PCard merchants identified in the query above are not set up as **Preferred Suppliers**. From this page, you can set the merchant up as preferred.



The screenshot shows the 'Preferred Suppliers' page in the Cardinal system. The page has a blue header with the Cardinal logo and 'Welcome to Cardinal!'. Below the header is a navigation menu with 'Favorites', 'Main Menu', 'Purchasing', 'Procurement Cards', 'Definitions', and 'Preferred Suppliers'. The 'Preferred Suppliers' tab is selected and highlighted with a red box. Below the navigation menu is a search bar with 'All' and 'Search' options. The main content area has a 'Find an Existing Value' tab and a 'Search Criteria' section. The search criteria include 'Merchant begins with', 'Country begins with', and 'State begins with'. There is also a 'Case Sensitive' checkbox and a 'Limit the number of results to (up to 300): 300' field. At the bottom, there is a 'Search' button (highlighted with a red box), a 'Clear' button, and links for 'Basic Search' and 'Save Search Criteria'.

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.

PR349_PCard Merchant to Preferred Supplier (VDOT)



Cardinal Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu Purchasing Procurement Cards Definitions Preferred Suppliers

List of Merchants Preferred Suppliers

List of Merchants Personalize Find View 100 First 1-7 of 18345 Last

Merchant	City	State	Country	Supplier SetID	Supplier ID	Location
<input checked="" type="radio"/> #FEDEX 442189034	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 652180424	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 652527623	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 795795768766188	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 876844017003	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 898720119757	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 90327904	800-4633339	TN	USA	STATE		

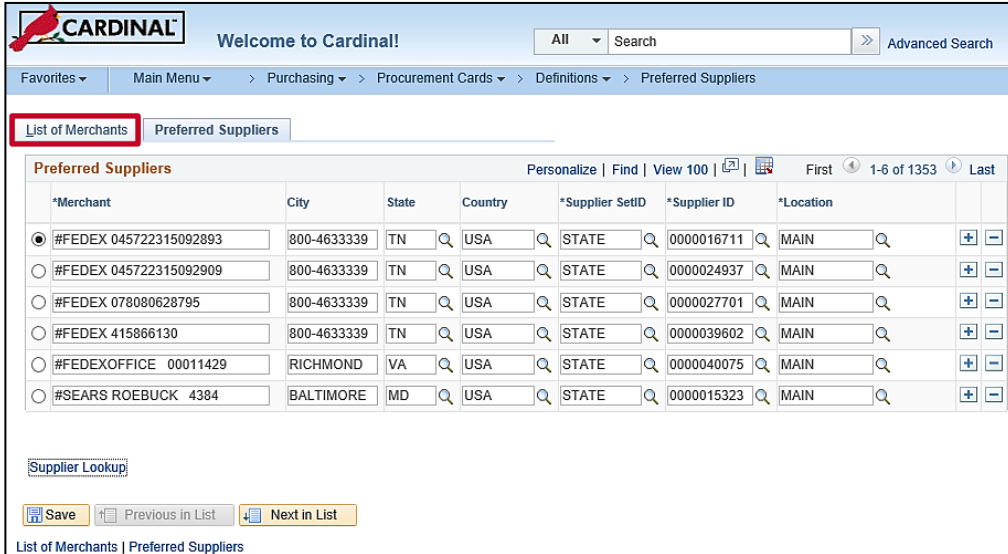
Supplier Lookup

Save Previous in List Next in List

List of Merchants | Preferred Suppliers

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.



Cardinal Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu Purchasing Procurement Cards Definitions Preferred Suppliers

List of Merchants Preferred Suppliers

Preferred Suppliers Personalize Find View 100 First 1-6 of 1353 Last

*Merchant	City	State	Country	*Supplier SetID	*Supplier ID	*Location
<input checked="" type="radio"/> #FEDEX 045722315092893	800-4633339	TN	USA	STATE	0000016711	MAIN
<input type="radio"/> #FEDEX 045722315092909	800-4633339	TN	USA	STATE	0000024937	MAIN
<input type="radio"/> #FEDEX 078080628795	800-4633339	TN	USA	STATE	0000027701	MAIN
<input type="radio"/> #FEDEX 415866130	800-4633339	TN	USA	STATE	0000039602	MAIN
<input type="radio"/> #FEDEXOFFICE 00011429	RICHMOND	VA	USA	STATE	0000040075	MAIN
<input type="radio"/> #SEARS ROEBUCK 4384	BALTIMORE	MD	USA	STATE	0000015323	MAIN

Supplier Lookup

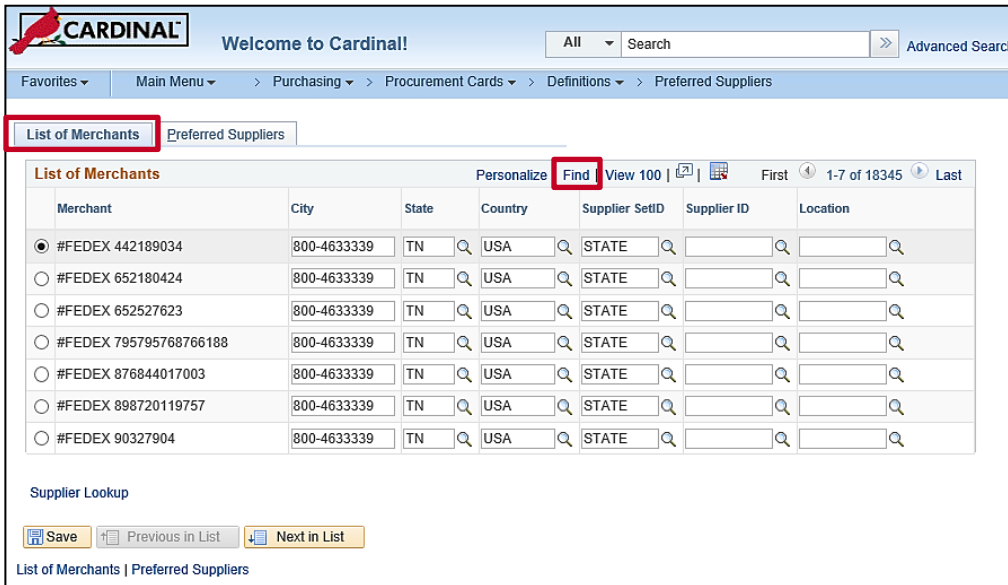
Save Previous in List Next in List

List of Merchants | Preferred Suppliers

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.



Cardinal Welcome to Cardinal! All Search Advanced Search

Favorites Main Menu Purchasing Procurement Cards Definitions Preferred Suppliers

List of Merchants Preferred Suppliers

List of Merchants Personalize Find View 100 First 1-7 of 18345 Last

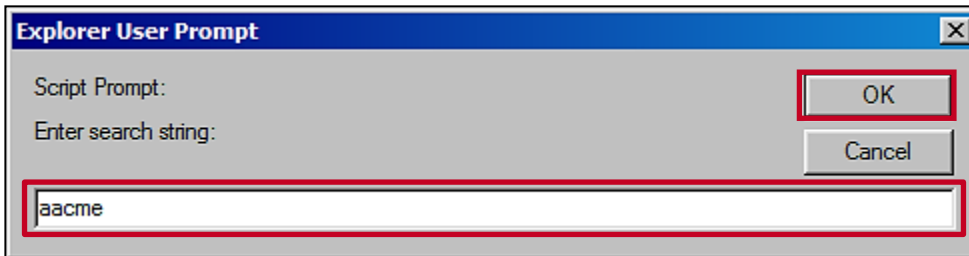
Merchant	City	State	Country	Supplier SetID	Supplier ID	Location
<input checked="" type="radio"/> #FEDEX 442189034	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 652180424	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 652527623	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 795795768766188	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 876844017003	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 898720119757	800-4633339	TN	USA	STATE		
<input type="radio"/> #FEDEX 90327904	800-4633339	TN	USA	STATE		

Supplier Lookup

Save Previous in List Next in List

List of Merchants | Preferred Suppliers

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



Explorer User Prompt

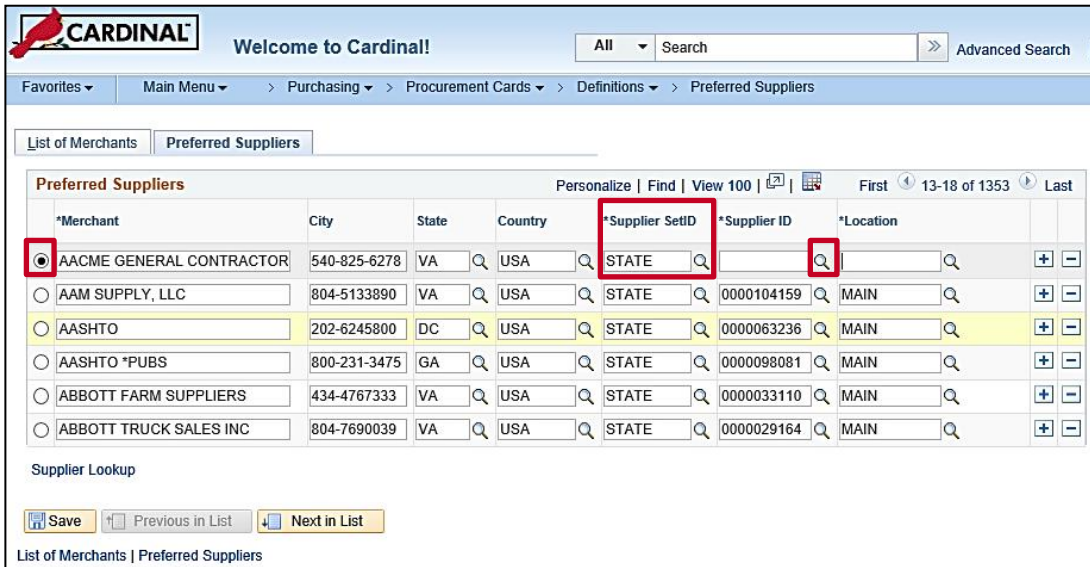
Script Prompt:

Enter search string:

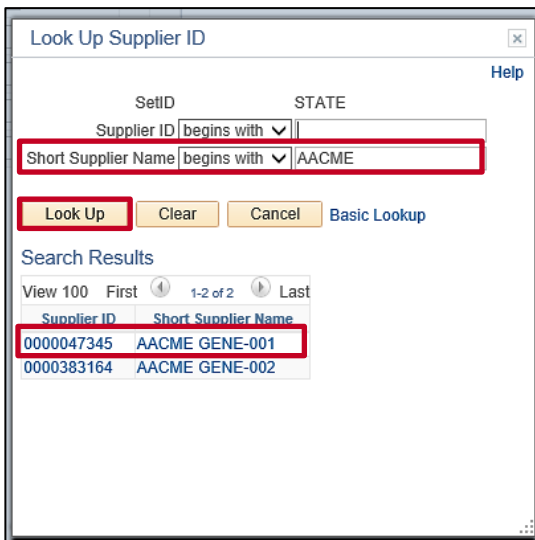
aacme

OK Cancel

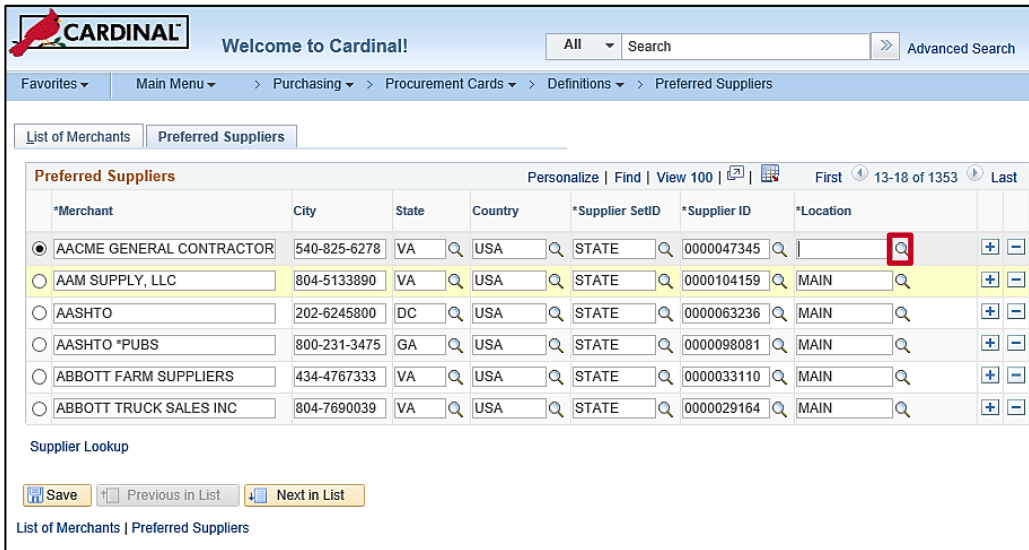
- Enter identifying details about the new PCard merchant, such as name or number, and click **OK**.



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.



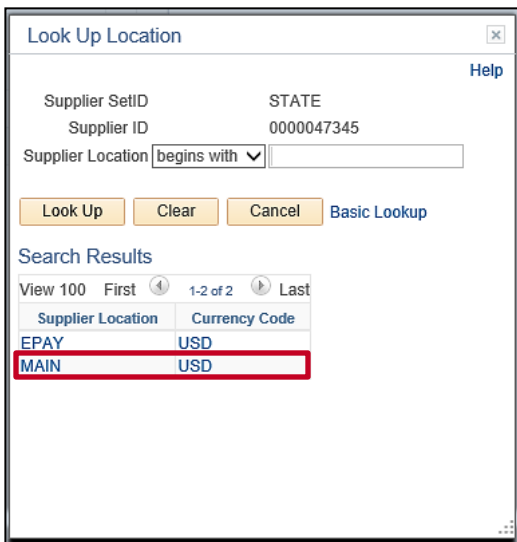
Preferred Suppliers Personalize | Find | View 100 | First 13-18 of 1353 Last

*Merchant	City	State	Country	*Supplier SetID	*Supplier ID	*Location
<input checked="" type="radio"/> AACME GENERAL CONTRACTOR	540-825-6278	VA	USA	STATE	0000047345	
<input type="radio"/> AAM SUPPLY, LLC	804-5133890	VA	USA	STATE	0000104159	MAIN
<input type="radio"/> AASHTO	202-6245800	DC	USA	STATE	0000063236	MAIN
<input type="radio"/> AASHTO *PUBS	800-231-3475	GA	USA	STATE	0000098081	MAIN
<input type="radio"/> ABBOTT FARM SUPPLIERS	434-4767333	VA	USA	STATE	0000033110	MAIN
<input type="radio"/> ABBOTT TRUCK SALES INC	804-7690039	VA	USA	STATE	0000029164	MAIN

Supplier Lookup

List of Merchants | Preferred Suppliers

- The **Supplier ID** field is populated.
- Click the **Location** look up magnifying glass.



Look Up Location Help

Supplier SetID STATE

Supplier ID 0000047345

Supplier Location begins with

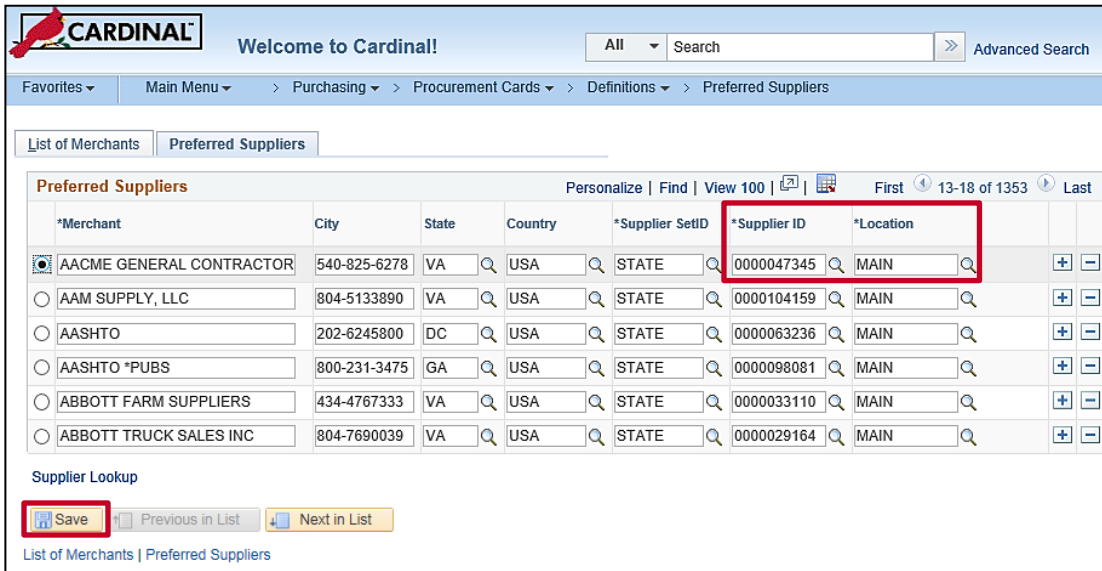
[Basic Lookup](#)

Search Results

View 100 First 1-2 of 2 Last

Supplier Location	Currency Code
EPAY	USD
MAIN	USD

- Click the **Supplier Location** hyperlink.



WELCOME TO CARDINAL! | Search | Advanced Search

Navigation: Favorites > Main Menu > Purchasing > Procurement Cards > Definitions > Preferred Suppliers

Buttons: List of Merchants | Preferred Suppliers

Preferred Suppliers | Personalize | Find | View 100 | First 13-18 of 1353 | Last

*Merchant	City	State	Country	*Supplier SetID	*Supplier ID	*Location
<input checked="" type="radio"/> AACME GENERAL CONTRACTOR	540-825-6278	VA	USA	STATE	0000047345	MAIN
<input type="radio"/> AAM SUPPLY, LLC	804-5133890	VA	USA	STATE	0000104159	MAIN
<input type="radio"/> AASHTO	202-6245800	DC	USA	STATE	0000063236	MAIN
<input type="radio"/> AASHTO *PUBS	800-231-3475	GA	USA	STATE	0000098081	MAIN
<input type="radio"/> ABBOTT FARM SUPPLIERS	434-4767333	VA	USA	STATE	0000033110	MAIN
<input type="radio"/> ABBOTT TRUCK SALES INC	804-7690039	VA	USA	STATE	0000029164	MAIN

Supplier Lookup

Buttons: Save | Previous in List | Next in List

Links: List of Merchants | Preferred Suppliers

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.