

State of Kansas P-Card Link Not Appearing on PO Statewide Management, Accounting and Reporting Tool

Date Created:		09-05-2013
Version:		V.1.0.
Version: Reason for Job aid		 Scenario: I want to pay for an item with a P-Card, but the P-Card link is not displaying on the Purchase Order (PO). How do I get the P-Card link to display on the PO? There are several criteria that must be met before the 'Use Procurement Card' link will display on a PO: The P-Card must have a current expiration date; The Buyer must have 'proxy' rights to the P-Card; The Vendor must be set up to accept P-Cards; and The Vendor Location effective date must be on or before the PO Date. This job aid provides the steps to validate that each of these criteria has been met, and provides steps to resolve issues associated with these criteria.
1. (Check the P-Card Expiration D	ate
1.1	SMART Security Role	Agency P-Card Administrator
1.2	Navigation	From the Home page in SMART: Click on ' Purchasing ', then click on ' Procurement Cards ', then click on ' Definitions ', and then click on ' Cardholder Profile ' (Find an Existing Value tab).
1.3	Search for the P-Card holder's profile and select the desired EmpIID link. In this example, we searched by the employee's name. You could also search by the Employee's ID number (if that information is known).	Cardholder Profile Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value EmpilD: begins with • Name: contains • Case Sensitive Search Clear Basic Search Save Search Criteria Search Results First • 1-19 of 19 • Last FmpliD Hame Last Name: Begennan, Angaine Search Results Hame First • 1-19 of 19 • Last Find and Example Hame Find and Example Hame Find and Example Hame First • 1-19 of 19 • Last Hame Find and Example Hame Find and Example Hame Find Basic Search Hame Find

1.4	Next, select the 'Card Data'	December Over Date
	tab:	
		Derreannel Statuer Employee
		Telephone: 785/29
		Home Address Mailing Address
		Country: USA United States
		Address 1. Address 2:
		Address 3:
		City:
		County: Postal:
		State:
		Save & Return to Search 1 Previous in List 1 Next in List Notify
		Personal Data Card Data
1.5	Validate that the Expiry date	Personal Data Card Data
	for the P-Card is current:	Display linmasked Card Number
		Card Data Customize Find 🗰 First 🗹 1:2 of 2 🕑 Last
		Business Unit "Lord Issuer "Card Humber Control Account Expiry Date Card Type Date Issued
		Q UMB
		Save A Return to Search 1 Previous in List ↓ Next in List ▷ Notify
		Personal Data Card Data
1.6	Action to take if the Expiry	Role: Agency P-Card Administrator
	date is <u>NOT current</u> :	Undete the Explicit detector come details the future of is
		Opdate the Expiry date to some date in the future. It is
		the future: however, when the P-Card expires or is canceled
		the Agency P-Card Administrator needs to enter the actual
		expiration or cancelation date into SMART.
		NOTE: The State of Kansas does not use SMART to manage
		the issuance of P-Cards; including P-Card expiration dates and
		P-Card transaction limitations. Those items are handled by
		UMB Bank. However, the P-Card Holder Profile in SMAR I
		must be assigned a current expiration date for the P-Card to be
2.	Check to see if the Buyer has '	Proxy' to this P-Card
21	Bole	Agency P-Card Administrator
2.2	Navigation	From the Home page in SMART: Click on ' Purchasing ' then
		click on ' Procurement Cards ', then click on ' Definitions '. and
		then click on 'Cardholder Profile' (Find an Existing Value tab).

2.3	Search for the P-Card holder profile and select the desired EmpIID link. In this example, we searched by the employee's name. You can also search by the Employee's ID number (if that information is known).	Cardholder Profile Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value EmpliD begins with contains
2.4	Select the 'Card Data' tab:	Personal Data Card Deta Name: Employee D: D: Personal Status: Employee Telephone: 785/29 Home Address Country: USA United States Address 1: Address 2: Address 3: City: County: Postai: State: Postai: State: Postai: State: Personal Data Card Data
2.5	In the Card Data section, select the ' Additional Information' tab:	Personal Data Card Data Display Junnasked Card Number Card Data Card Data Customice End # First I 12 or 2 Last Card Data Card Type Business Unit Card Number Q UMB Image: Control Account Image: Control Account Image: Control Account Image: Control Account Image: Control Account Image: Control
2.6	Select the ' Proxies ' link on the desired line: <u>Note</u> : Clicking the 'Proxies' link opens the ' Assign Proxies ' page.	Eersonal Data Card Data Display Unmasked Card Number Card Data Customize Find # First © 1-2 of 2 D Last Credet Card Additional Information Credit Limits © Transaction Limits Business Unit Scard Baser Scard Number Q UMB Vendors Proxies Default Distrib Q UMB Vendors Proxies Default Distrib Q UMB Vendors Proxies Default Distrib Save C. Return to Search till Previous in List Personal Data Card Data

2.7	In the Proxies section:	Assign Proxies		
	Validate that the applicable	UMB Card Numbe		
	Buyer's ID/Name is listed in	Proxies *User ID	Description	"Role Requester Buyer
	the User ID column.	Summer.	Q Hannarit Hannar	PO Central P-Card Admin
		004010MB	Q Internation	KPO_Cen_P-Card_Admin 👻 🗌 🛨 🖃
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		an constant	Q #10100171710000	PO Agency P-Card Admin ▼ □ + ■
		WOOTLIN	Q Hart-Hunter	PO agy P-Card Recon Appro 👻 📄 🛨 🚍
		OK Cancel		
2.8	Action to take if the Buyer does <u>NOT</u> have Proxy to the P-Card:	Role: Ag Add the B	ency P-Card Adr uyer's ID using	ninistrator the following steps.
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2.0.1	On the Assign Floxies	Assign Floxies		
	page, in the Proxies section.	UMB Card Numbe	c +###	
	Click the plus sign button	Proxies <u>*User ID</u>	Description	Role Requester Buyer Buyer Personal Default
		E-MODIAL	Q Honnes (#) Hourses	PO Central P-Card Admin 👻
	(LT) located at the far right	CONTRACTOR OF		KPO_Cen_P-Card_Admin
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		OK Cancel		
282	This will add a new row In	Assign Proxies		
2.0.2	the new row User ID column	Hisponian, 2016		
	ontor the desired SMART	UMB Card Number		
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2.8.3	In the Role column, click the	OK Cancel		
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2.8.3	In the Role column, click the drop-down list arrow and select the desired role from	OK Cancel Assign Proxies UMB Card Number Proxtes		Bannastar Buntar
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options:	OK Cancel Assign Proxies UMB Card Number Proxies User ID	Description	rRole Requester Buyer Default Default
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options:	OK Cancel Assign Proxies UMB Card Number Proxies User ID	2 Pescription	Bole Requester Bayer PO Central P-Card Admin Po Central P-Card Admin Po Central P-Card Admin KPO Cent P-Card Admin Po Central P-Card Admin Po Central P-Card Admin
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: Note : The roles available in	OK Cancel Assign Proxies UMB Card Number Proxies User ID	Pescription	Redue Reduester Buyer PO Central P-Card Admin • • KPO_Cen_P-Card_Admin • • PO Central P-Card Admin • •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: <u>Note</u> : The roles available in the Role drop down box will	OK Cancel Assign Proxies UMB Card Number Proxies UMB Card Number Proxies Units of the second	C C C C C C C C C C C C C C C C C C C	Rete Reducestor Bayer PO Central P-Card Admin • • KPO_Cen_P-Card_Admin • • PO Central P-Card Admin • • PO Central P-Card Admin • • PO Agency P-Card Holder • •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: <u>Note</u> : The roles available in the Role drop down box will	OK Cancel Assign Proxies UMB Card Number Proxies User ID	Pescription	Role Requester Default Buyer Default PO Central P-Card Admin • • KPO_Cen_P-Card_Admin • • PO Central P-Card Admin • • PO Central P-Card Admin • • PO Central P-Card Admin • • PO Agency P-Card Holder • • PO Kansas Buyer • •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: Note : The roles available in the Role drop down box will vary depending on the	OK Cancel Assign Proxies UMB Card Number Proxies UMB Card Number Proxies User ID		Role Requestor Buyer PO Central P-Card Admin • • KPO_Cen_P-Card_Admin • • PO Central P-Card Admin • • PO Central P-Card Admin • • PO Central P-Card Admin • • PO Agency P-Card Holder • • PO Kansas Buyer • • PO Kansas Buyer • • PO Agency P-Card Admin • •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: Note : The roles available in the Role drop down box will vary depending on the security access roles that	OK Cancel Assign Proxies UMB Card Number Proxies UMB C		Bole Bouvester PO Central P-Card Admin Central P-Card Admin KPO_Cen_P-Card_Admin Central P-Card Admin PO Central P-Card Admin Central P-Card Admin PO Agency P-Card Holder Central P-Card Admin PO Kansas Buyer Central P-Card Admin PO Kansas Buyer Central P-Card Admin PO Kansas Buyer Central P-Card Admin PO Agency P-Card Admin Central P-Card Admin PO Agency P-Card Admin Central P-Card Admin
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: <u>Note</u> : The roles available in the Role drop down box will vary depending on the security access roles that have been assigned to the	OK Cancel Assign Proxies UMB Card Number Proxies UMB Card Number Proxies User ID		Role Requester Default Buver Pefault PO Central P-Card Admin • • PO Agency P-Card Admin • • PO Agency P-Card Holder • • PO Kansas Buyer • • PO Agency P-Card Admin • • PO Agency P-Card Admin • • PO agency P-Card Recon Appro • • PO Agency P-Card Recon Appro • •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: <u>Note</u> : The roles available in the Role drop down box will vary depending on the security access roles that have been assigned to the Buyer. In most cases, the	OK Cancel OK Cancel OK Cancel OK Cancel OK Cancel	Perscription	Reduester Buver Default PO Central P-Card Admin • PO Agency P-Card Admin • PO Kansas Buyer • PO Agency P-Card Admin • PO Kansas Buyer • PO Agency P-Card Recon Appro • PO Central P-Card Admin • PO Central P-Card Admin • PO Agency P-Card Recon Appro • PO Central P-Card Admin • PO Central P-Card Admin • PO Central P-Card Admin •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: <u>Note</u> : The roles available in the Role drop down box will vary depending on the security access roles that have been assigned to the Buyer. In most cases, the ' PO Kansas Buyer ' role is	OK Cancel Assign Proxies UMB Card Number Proxies 'User ID 'Iser ID	Pescription Q	Requester Bayer PO Central P-Card Admin • PO Agency P-Card Holder • PO Kansas Buyer • PO Agency P-Card Admin • PO Agency P-Card Admin • PO Agency P-Card Admin • PO agency P-Card Recon Appro • PO Central P-Card Admin • PO Kansas Buyer • PO Agency P-Card Admin • PO Agency P-Card Admin • PO Agency P-Card Admin • PO Agency P-Card Recon Appro • PO Central P-Card Admin • PO Kansas Buyer •
2.8.3	In the Role column, click the drop-down list arrow and select the desired role from the drop down list options: <u>Note</u> : The roles available in the Role drop down box will vary depending on the security access roles that have been assigned to the Buyer. In most cases, the ' PO Kansas Buyer ' role is the one that will be selected.	OK Cancel Assign Proxies UMB Card Number Proxies User ID Image: State of the sta	Pescription	Requester Bayer PO Central P-Card Admin Po FO Central P-Card Admin Po PO Central P-Card Admin Po PO Central P-Card Admin Po PO Agency P-Card Holder Po PO Kansas Buyer Po PO Agency P-Card Admin Po PO Central P-Card Admin Po PO Central P-Card Admin Po PO Central P-Card Admin Po PO Kansas Buyer Po

2.8.4	Select the ' OK ' button, located at the bottom left corner of the Assign Proxies page: <u>Note</u> : Clicking the OK button returns you to the Card Data page. On the Card Data page, click the ' Save' button which is located at the bottom left corner of the page:	Assign Proxies UNB Card Number: Proxies Reduester Borger Description PO Central P-Card Admin Image: Central P-Card Admin Image: Central P-Card Recon Appro Image: Central P-Card Admin Image: Central Data Image: Central P-Card Admin Image: Central Data Image: Central Recon Appro Image: Central Data Image: Central Data Image: Central Data Image: Central Data
		Return to Search Image: Previous in List Image: Notify Personal Data Card Data
3.	Validate that the Vendor is set	up to accept P-Card's as a method of payment
3.1	Role(s)	 Agency Vendor Processor Vendor Viewer
3.2	Navigation	From the Home page in SMART, click on ' Vendor ', then click on ' Vendor Information ', then click on ' Add/Update ', and then click on ' Vendor '.
3.3	On the Vendor Information page, enter the desired ' Vendor ID' and click the ' Search' button: <u>Note</u> : This will open the Vendor's file.	Vendor Information Enter any information you have and click Search. Leave fields blank for a list of all values. Find an Existing Value Add a New Value SetID: = SOKID Vendor ID: begins with Degins with 0000002571 Persistence: = Short Vendor Name: begins with Dur Customer Number: begins with Degins with Q Name 1: begins with Degins with Q Search Clear Basic Search Save Search Criteria Find an Existing Value Add a New Value
3.4	In the Vendor's file, click the ' Location' tab:	Summary Identifying Information Address Contacts Location Cuistom SettD: SOKID Vendor ID: 000002571 Vendor ID: 000002571 Vendor Name: STAPLES CO STAPLES CO-001 Vendor Name: STAPLES CONTRACT & COMMERCIAL INC Order: STAPLES CO-001 Remit To: STAPLESCO-001 1400 N CAMBRIDGE ST 39143 TREASURY CENTER KANSAS CITY, MO 64120-2104 CHICAGO, IL 60594-9100 Status: Approved Last Modified By: FIRSTLOGIC Persistence: Regular Last modified date: 05/27/2013 11:53AM Classification: Supplier Created By: C/N HCM Class: Created By: C/N Vithholding: No Vat: No Vat: No Exadt @UpdateOmplay Include History Correct History Summary Identifying information Address Contacts Location Custom Custom Correct History

3.5	On the Location tab, Details section, click the 'Procurement' link . This will open the 'Procurement Options' page: <u>Note</u> : If the vendor's file has multiple Locations, please ensure that you are choosing the correct Location. <u>Hint</u> : The correct vendor Location can be found on the PO, by clicking the 'Vendor Details' link in the Header section of the PO.	Summary Identifying Information Address Contacts Location Custom SettD: SOKID Vendor: 0000002571 Short Vendor Name: STAPLES CONTRACT & COMMERCIAL INC A vendor location is a default set of rules which define how you conduct business with a vendor. Image: Status is a default set of rules which define how you conduct business with a vendor. Image: Status is a default set of rules which define how you conduct business with a vendor. Image: Details Image: Status is in the status is internet Address Image: Status is internet Address is internet in the status is internet Address is internet Addr
3.6	On the Procurement Options page: Scroll to the bottom of the page. Click the ' Expand' button for the ' Procurement Card Information' section:	Procurement Options Sett0: SOKID Location: 001 Vendor ID: 0000002571 Description: SYSTEM CHECK Short Vendor Name: STAPLES CONTRACT & COMMERCIAL INC Expand All Collapse All Ordering Vendor: 0000002571 Vendor: 0000002571 STAPLES CONTRACT & COMMERCIAL INC *Address: 8 Search KCMO Whse Location 1400 N CAMBRIDGE ST KANSAS CITY, MO 64120-2104 Location: Location: 001 SYSTEM CHECK Pricing Vendor 0000002571 Vendor 00000002571 STAPLES CONTRACT & COMMERCIAL INC *Location: 001 SYSTEM CHECK Vendor 0000002571 STAPLES CONTRACT & COMMERCIAL INC *Location: 001 SYSTEM OPECK Vendor 001 SYSTEM CHECK • Additional Procurement Options • • Dispatch Methods • • POA Settings • • Procurement Card Information • Expand All Collapse All
3.7	 Validate that the Procurement Card Information section has been correctly completed: The 'Accepts Procurement Card as payment method' checkbox should be checked The 'Contact Cardholder' option is selected in the 'ProCard Dispatch Option' <u>AND</u> The 'Visa' option is selected as the 'Card Type' 	Procurement Card Information Procurement Card as payment method "ProCard Dispatch Option: Contact Cardholder Types of Procurement Card Accepted Card Type 1 Visa Expand All Collapse All

3.8	Action to take if the Vendor is <u>NOT</u> set up to accept P-Card payments.	Your agency needs to submit a Service Desk Request requesting that the Vendor ID be updated to accept P-Card payments. Please ensure that you include the Vendor ID number in the Service Desk Request.
4. \	Validate that the Vendor Locat	on's Effective Date is on, or before, the PO Date
4.1	Role	Kansas Buyer
4.2	Navigation	From the Home page in SMART, click on ' Purchasing ', then click on ' Purchase Orders ', then click on ' Add/Update POs '. Search for, and select, the desired PO. This will open the ' Maintain Purchase Order ' page.
4.3	On the Maintain Purchase Order page, Header section:	Maintain Purchase Order Purchase Order Unit: PO Status: Dispatched △ × PO ID: Budget Status: Valid jii jii jii
	Make a note of the PO Date.	Copy From: Hold From Further Processing * Header Hold From Further Processing Hold From Further Processing * PO Data: 05/30/2013 B Vendor Status: None Create BackOrder Vendor STAPLESCO-001 Vendor Data: Backorder Status: None Create BackOrder
	In this example, the PO Date is 05/30/2013.	"Vendor ID: 0000002571 STAPLES CONTRACT & COMMERCIAL INC Receipt Status: Not Recod "Buyer: BA00AVS Amanda X Sprengeler "Dispatch Method: EDX • PO Reference: Amount Summary
	Next, click the ' Vendor Details' link:	
4.4	On the Vendor Details page:	Maintain Purchase Order
	At the top section of the page: Make a note of the Location code.	Vendor Details STAPLES CONTRACT & COMMERCIAL INC Unit: PO ID: Vendor: STAPLESCO-01 Vendor: Stalesperson Salesperson: Q Show Salesperson Details Basis Dt Type: Inv Date Inv Date
	code displayed is '001'.	Vendor Details Message
	Next, click the ' Vendor Information' link:	Country: USA United States Prefix: Address 1: 1400 N CAMBRIDGE ST Fax: 816/504-2530 Address 2: KC DISTRIBUTION CENTER Prefix: Address 3: Phone: 816/504-2515 City: KANSAS CITY 816/504-2515 County: JACKSON Postal: 64120-2104 State: MO Missouri
4.5	Clicking the 'Vendor Information' link opens a new window which displays the ' Identifying Information ' tab of the vendor's file. On the vendor's file, click the ' Location' tab:	Summary Identifying Information Address Contacts Location Cystom SettD: SOKID Check for Duplicate Vendor ID: 0000002571 *Vendor Short Name: STAPLES CO STAPLES CO-001 *Vendor Name 1: STAPLES CONTRACT & COMMERCIAL INC Vendor Name 2:

4.6	On the Location tab, in the Location section:	Summary Identifying Information Address Contacts Location Custom SettD: SOKID Vander: STAPLESCO-001 Name: STAPLES CONTRACT & COMMERCIAL INC
	Navigate to the desired Location code.	A vendor location is a default set of rules which define how you conduct business with a vendor. Location Location Location: 001 Covertual of 1 Covertu
	In this example, the desired Location code is '001'.	Description: STSTEM CHECK RTV Fees Details Find View All First 1 of 1 Lest Fffective Date: 01/01/1901 B Status: Active
	In the Details section for the Location:	Options: Pavables Procurement Sales/Use Tax 1099 Expand All Collapse All > Additional ID Numbers > Comments > Internet Address
	Validate that the Effective Date is on, or before, the PO Date.	Expand All Collapse All Save Return to Search Notify Add Update/Display Include History Correct History Summary Identifying Information Address Contacts Location Custom
	In this example, the PO Date is '05/30/2013' and the Location code 'Effective Date' is 01/01/1901.	
	The Effective Date of 01/01/1901 occurs before the PO Date of 05/30/2013.	
4.7	Action to take if the vendor's Location code Effective Date is <u>AFTER</u> the PO Date .	 Agencies should try the following options, in the following order: 1) Change the Location Code on the PO 2) Change the PO Date 3) If the prior two options do not resolve the issue, please submit a service desk ticket and the SMART team will review the issue.
Option	1 – Change the Location Code	Below are screen shots for above options 1 and 2: on the PO
471	Navigate to and open the	Maintain Purchase Order
7.7.1	desired PO.	Purchase Order Unit: PO Status: Dispatched \triangle × PO ID: Budget Status: Valid
	In the Header section, click the ' Vendor Details' link:	Copy From: Hold From Further Processing * Header *PD Date: 05/31/2013 Vendor Search Vendor INTERCALL-001 Vendor Details Backorder Status: None *Vendor ID: 0000154693 INTERCALL INC Receipt Status: Not Recvd *Buyer: DA00ARH Angela R Hoobler "Dispatch Method: Print PO Reference: Amount Summary

4.7.2	Click the 'Look Up' icon for the 'Location Code' field. This will open the ' Look Up Location ' page: (The 'Magnifying glass' icon which is located to the right of the Location Code field)	Maintain Purchase Order Vendor Details INTERCALL INC Unit: PO ID: Vendor: INTERCALL-001 *Location: 002 Vendor: INTERCALL-001 *Address: I Show Address Details Terms: 00 Due Immediately Contact: Image: Show Contact Details Terms: 00 Due Immediately Salesperson: Show Salesperson Details Basis Dt Type: Imv Date Immediately Vendor Details Message Vendor Details Message Country: USA United States Prefix: Address 1: 1211 OG SKINNER DR Fax: Address 2: Prefix: Address 3: Prefix: Phone: City: WEST POINT Country: Postal: 31833-1789 State: GA Georgia OK Cancel Refresh Prefix: Phone: Phone:
4.7.3	On the Look Up Location page: Select a different Location code (if available). <u>Note</u> : Since this is a P-Card transaction, changing the Location code will have minimal impact. <u>Caution</u> : On PO's that are not associated to P-Cards, Buyers should <u>NOT</u> change the Location code without first thoroughly evaluating the situation.	Look Up Location Vendor SetID: SOKID Vendor ID: 0000154693 Vendor Location: begins with ▼ Look Up Clear Cancel Basic Lookup Search Results View All First ▲ 1-2 of 2 ▶ Last Vendor System CHECK 002 ACH ****2223
Option	2 - Change the PO Date	
4.7.4	Navigate to, and open the desired PO . On the PO, in the Header section: Enter a new PO Date that is <u>PRIOR</u> to the Vendor's Location code Effective Date : <u>Note</u> : If a contract is associated to the PO, you will also need to verify that the new PO Date is still within the contract's effective dates .	Maintain Purchase Order Unit: PO ID: Copy From: Vendor ID: PO Date: PO 55/31/2013 PU vendor Search Vendor ID: PO 0000154693 INTERCALLINC Backorder Status: None Create BackOrder PO Reference: Amount Summary

Scenario: You have validated all four criteria listed above, but the 'Use Procurement Card' link is still NOT visible on the PO.
 Action to take: Open a Service Desk Request. Please be sure to include the following information in the Service Desk Request:
 PO number

- > P-Card holder's name
- > Last four (4) digits of the P-Card number