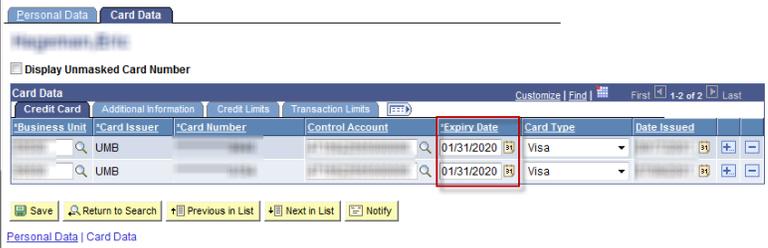
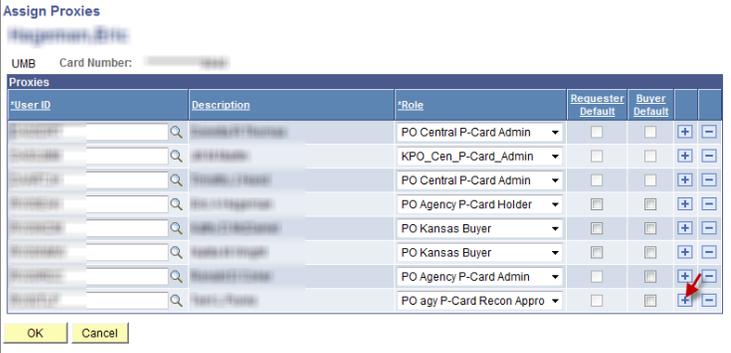
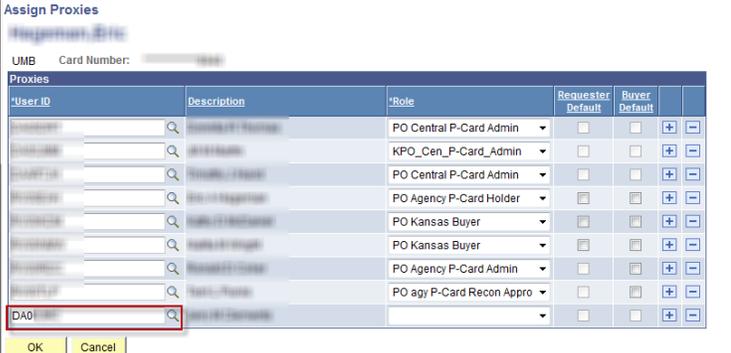
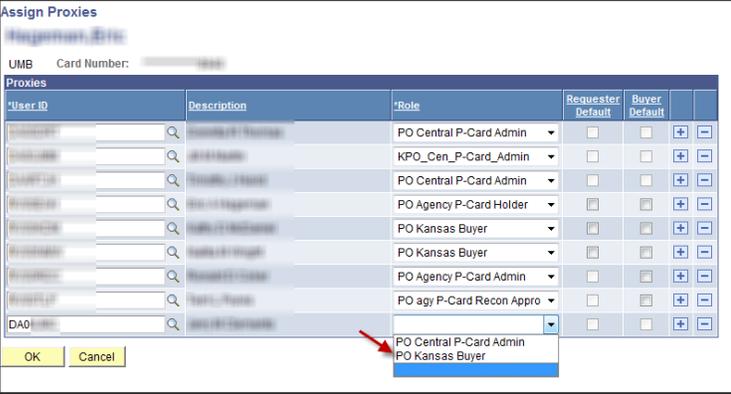
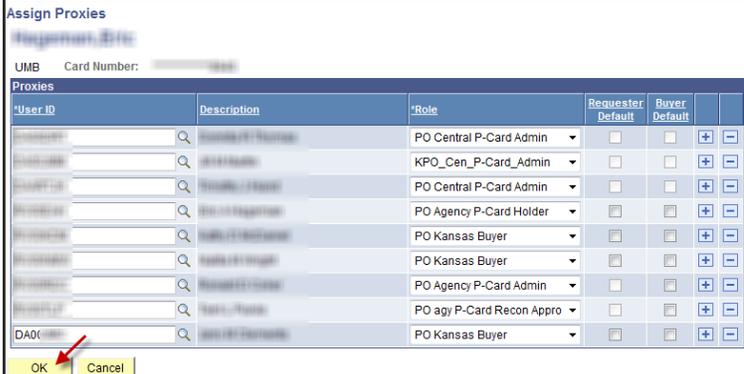
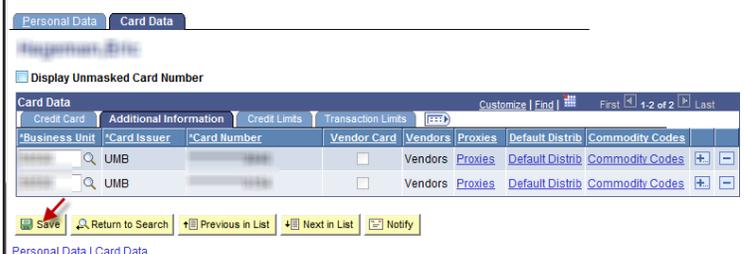


1.4	Next, select the 'Card Data' tab:	
1.5	Validate that the Expiry date for the P-Card is current:	
1.6	Action to take if the Expiry date is <u>NOT</u> current :	<p>Role: Agency P-Card Administrator</p> <p>Update the Expiry date to some date in the future. It is acceptable to use expiration dates that are 50 or more years in the future; however, when the P-Card expires or is canceled, the Agency P-Card Administrator needs to enter the actual expiration or cancellation date into SMART.</p> <p>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 SMART must be assigned a current expiration date for the P-Card to be available on a transaction (such as a Purchase Order) in SMART.</p>
2. Check to see if the Buyer has 'Proxy' to this P-Card		
2.1	Role	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).

2.7	<p>In the Proxies section: Validate that the applicable Buyer's ID/Name is listed in the User ID column.</p>		
2.8	<p>Action to take if the Buyer does NOT have Proxy to the P-Card:</p>	<p>Role: Agency P-Card Administrator Add the Buyer's ID using the following steps.</p>	
2.8.1	<p>On the Assign Proxies page, in the Proxies section: Click the plus sign button () located at the far right side of the last row:</p>		
2.8.2	<p>This will add a new row. In the new row, User ID column, enter the desired SMART 'User ID' for the Buyer:</p>		
2.8.3	<p>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 have been assigned to the Buyer. In most cases, the 'PO Kansas Buyer' role is the one that will be selected.</p>		

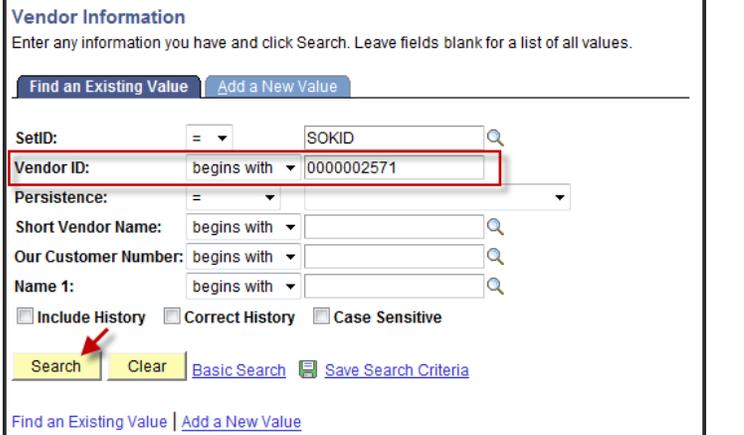
<p>2.8.4</p> <p>Select the 'OK' button, located at the bottom left corner of the Assign Proxies page:</p> <p>Note: Clicking the OK button returns you to the Card Data page.</p>		 <p>Assign Proxies</p> <p>UMB Card Number: [redacted]</p> <table border="1"> <thead> <tr> <th>User ID</th> <th>Description</th> <th>Role</th> <th>Requester Default</th> <th>Buyer Default</th> </tr> </thead> <tbody> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Central P-Card Admin</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>KPO_Cen_P-Card_Admin</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Central P-Card Admin</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Agency P-Card Holder</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Kansas Buyer</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Kansas Buyer</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Agency P-Card Admin</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO agy P-Card Recon Appro</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> <tr> <td>[redacted]</td> <td>[redacted]</td> <td>PO Kansas Buyer</td> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> </tr> </tbody> </table> <p>OK Cancel</p>	User ID	Description	Role	Requester Default	Buyer Default	[redacted]	[redacted]	PO Central P-Card Admin	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	KPO_Cen_P-Card_Admin	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO Central P-Card Admin	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO Agency P-Card Holder	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO Kansas Buyer	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO Kansas Buyer	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO Agency P-Card Admin	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO agy P-Card Recon Appro	<input type="checkbox"/>	<input type="checkbox"/>	[redacted]	[redacted]	PO Kansas Buyer	<input type="checkbox"/>	<input type="checkbox"/>	
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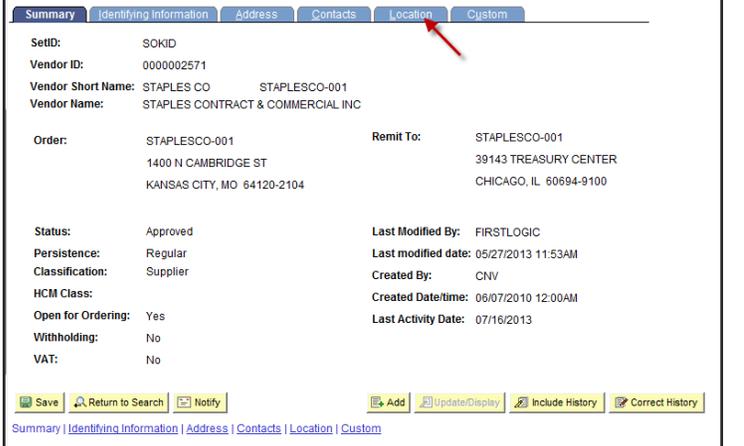
<p>2.8.5</p> <p>On the Card Data page, click the 'Save' button which is located at the bottom left corner of the page:</p>		 <p>Personal Data Card Data</p> <p>UMB Card Number: [redacted]</p> <p>Display Unmasked Card Number</p> <p>Card Data</p> <p>Credit Card Additional Information Credit Limits Transaction Limits [list]</p> <table border="1"> <thead> <tr> <th>Business Unit</th> <th>Card Issuer</th> <th>Card Number</th> <th>Vendor Card</th> <th>Vendors</th> <th>Proxies</th> <th>Default Distrib</th> <th>Commodity Codes</th> </tr> </thead> <tbody> <tr> <td>[redacted]</td> <td>UMB</td> <td>[redacted]</td> <td><input type="checkbox"/></td> <td>Vendors</td> <td>Proxies</td> <td>Default Distrib</td> <td>Commodity Codes</td> </tr> <tr> <td>[redacted]</td> <td>UMB</td> <td>[redacted]</td> <td><input type="checkbox"/></td> <td>Vendors</td> <td>Proxies</td> <td>Default Distrib</td> <td>Commodity Codes</td> </tr> </tbody> </table> <p>Save Return to Search Previous in List Next in List Notify</p> <p>Personal Data Card Data</p>	Business Unit	Card Issuer	Card Number	Vendor Card	Vendors	Proxies	Default Distrib	Commodity Codes	[redacted]	UMB	[redacted]	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes	[redacted]	UMB	[redacted]	<input type="checkbox"/>	Vendors	Proxies	Default Distrib	Commodity Codes	
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3. Validate that the Vendor is set up to accept P-Card's as a method of payment

<p>3.1</p>	<p>Role(s)</p>	<ul style="list-style-type: none"> Agency Vendor Processor Vendor Viewer 	
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<p>3.2</p>	<p>Navigation</p>	<p>From the Home page in SMART, click on 'Vendor', then click on 'Vendor Information', then click on 'Add/Update', and then click on 'Vendor'.</p>	
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<p>3.3</p> <p>On the Vendor Information page, enter the desired 'Vendor ID' and click the 'Search' button:</p> <p>Note: This will open the Vendor's file.</p>		 <p>Vendor Information</p> <p>Enter any information you have and click Search. Leave fields blank for a list of all values.</p> <p>Find an Existing Value Add a New Value</p> <p>SetID: = SOKID</p> <p>Vendor ID: begins with 0000002571</p> <p>Persistence: =</p> <p>Short Vendor Name: begins with</p> <p>Our Customer Number: begins with</p> <p>Name 1: begins with</p> <p><input type="checkbox"/> Include History <input type="checkbox"/> Correct History <input type="checkbox"/> Case Sensitive</p> <p>Search Clear Basic Search Save Search Criteria</p> <p>Find an Existing Value Add a New Value</p>	
--	--	---	--

<p>3.4</p> <p>In the Vendor's file, click the 'Location' tab:</p>		 <p>Summary Identifying Information Address Contacts Location Custom</p> <p>SetID: SOKID</p> <p>Vendor ID: 0000002571</p> <p>Vendor Short Name: STAPLES CO STAPLES-001</p> <p>Vendor Name: STAPLES CONTRACT & COMMERCIAL INC</p> <p>Order: STAPLES-001 1400 N CAMBRIDGE ST KANSAS CITY, MO 64120-2104</p> <p>Remit To: STAPLES-001 39143 TREASURY CENTER CHICAGO, IL 60694-9100</p> <p>Status: Approved</p> <p>Persistence: Regular</p> <p>Classification: Supplier</p> <p>HCM Class:</p> <p>Open for Ordering: Yes</p> <p>Withholding: No</p> <p>VAT: No</p> <p>Last Modified By: FIRSTLOGIC</p> <p>Last modified date: 05/27/2013 11:53AM</p> <p>Created By: CNV</p> <p>Created Date/time: 06/07/2010 12:00AM</p> <p>Last Activity Date: 07/16/2013</p> <p>Save Return to Search Notify Add Update/Display Include History Correct History</p> <p>Summary Identifying Information Address Contacts Location Custom</p>	
--	--	--	--

3.5

On the Location tab, **Details** section, click the **'Procurement'** link. This will open the **'Procurement Options'** page:

Note: If the vendor's file has multiple Locations, please ensure that you are choosing the correct Location.

Hint: The correct vendor Location can be found on the PO, by clicking the 'Vendor Details' link in the Header section of the PO.

3.6

On the **Procurement Options** page:

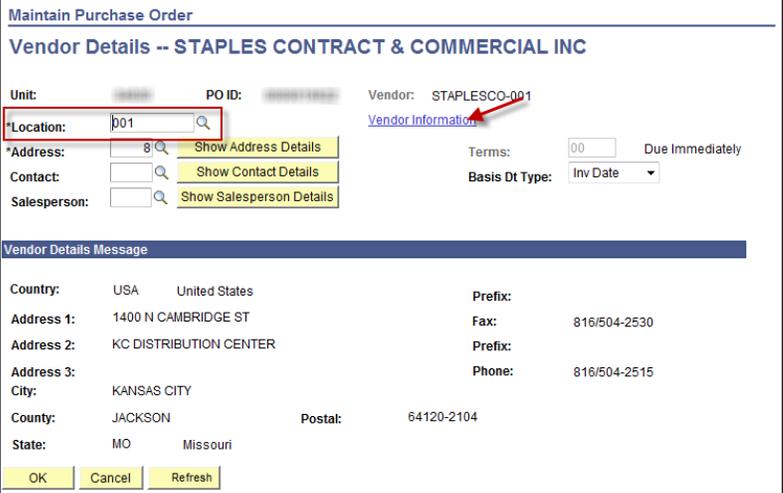
Scroll to the bottom of the page.

Click the **'Expand'** button for the **'Procurement Card Information'** section:

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'** AND
- The **'Visa'** option is selected as the **'Card Type'**

3.8	Action to take if the Vendor is NOT 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 Location'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	<p>On the Maintain Purchase Order page, Header section:</p> <p>Make a note of the PO Date.</p> <p>In this example, the PO Date is 05/30/2013.</p> <p>Next, click the 'Vendor Details' link:</p>	
4.4	<p>On the Vendor Details page:</p> <p>At the top section of the page: Make a note of the Location code.</p> <p>In this example, the Location code displayed is '001'.</p> <p>Next, click the 'Vendor Information' link:</p>	
4.5	<p>Clicking the 'Vendor Information' link opens a new window which displays the 'Identifying Information' tab of the vendor's file.</p> <p>On the vendor's file, click the 'Location' tab:</p>	

4.6 On the **Location** tab, in the **Location** section:

Navigate to the desired Location code.

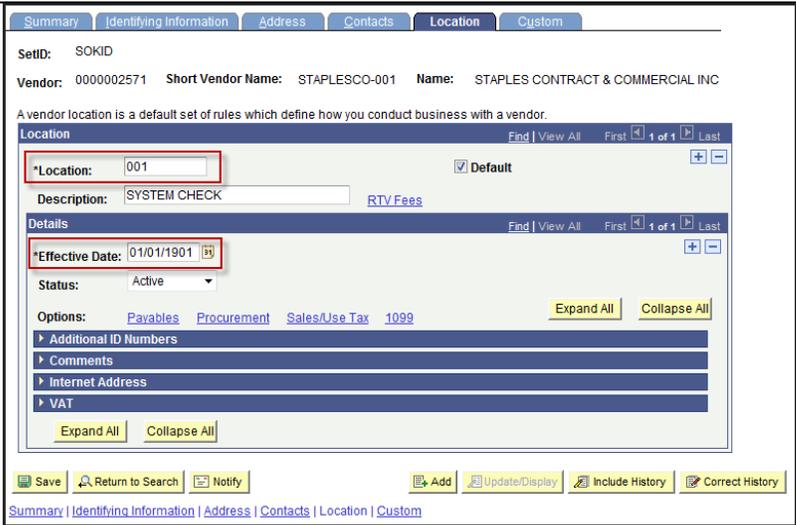
In this example, the desired Location code is '001'.

In the **Details** section for the Location:

Validate that the **Effective Date** is on, or before, the PO Date.

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 **AFTER** the **PO Date**.

Agencies should try the following options, in the following order:

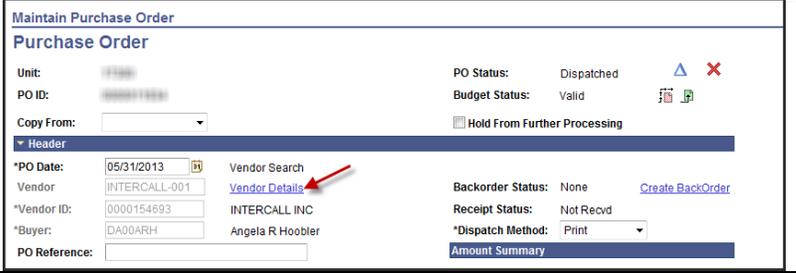
- 1) Change the Location Code on the PO
- 2) Change the PO Date
- 3) If the prior two options do not resolve the issue, please submit a service desk ticket and the SMART team will review the issue.

Below are screen shots for above options 1 and 2:

Option 1 – Change the Location Code on the PO

4.7.1 **Navigate** to, and open, the desired PO.

In the Header section, click the '**Vendor Details**' link:



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: 17188 PO ID: 00001188 Vendor: INTERCALL-001

*Location: 002  [Show Address Details](#)

*Address: 1 [Show Address Details](#)

Contact: [Show Contact Details](#)

Salesperson: [Show Salesperson Details](#)

Vendor Information

Terms: 00 Due Immediately

Basis Dt Type: Inv Date

Vendor Details Message

Country: USA United States Prefix:

Address 1: 1211 OG SKINNER DR Fax:

Address 2: Prefix:

Address 3: Phone:

City: WEST POINT

County: Postal: 31833-1789

State: GA Georgia

OK Cancel Refresh

4.7.3

On the Look Up Location page:

Select a different Location code (if available).

Note: Since this is a P-Card transaction, changing the Location code will have minimal impact.

Caution: On PO's that are not associated to P-Cards, Buyers should **NOT** 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 Location	Description
001	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 **PRIOR** to the Vendor's Location code **Effective Date**:

Note: 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
Purchase Order

Unit: 17188 PO Status: Dispatched

PO ID: 00001188 Budget Status: Valid

Copy From: Hold From Further Processing

Header

*PO Date: 05/31/2013 [Vendor Search](#)

Vendor: INTERCALL-001 [Vendor Details](#)

*Vendor ID: 0000154693 INTERCALL INC

*Buyer: DA00ARH Angela R Hoobler

PO Reference: Backorder Status: None [Create BackOrder](#)

Receipt Status: Not Recvd

*Dispatch Method: Print [Amount Summary](#)

After all four criteria have been validated - open a Service Desk Request

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