Creating P-Card Requisitions

A P-Card can be added to the requisition as the payment method.

If a requester is a proxy for a procurement card, the **Card Number** dropdown will appear displaying all P-Cards associated with the requester.

A P-Card can be picked from the **Card Number** dropdown. When a P-Card is selected, the card's expiration date appears in the **Card Expiration** field on the requisition, and the **Use Procurement Card** checkbox is selected.

The P-Card selection can be reviewed on the Checkout - Review and Submit page.

Procedure

After completing this topic, you will be able to create a requisition using a P-Card.
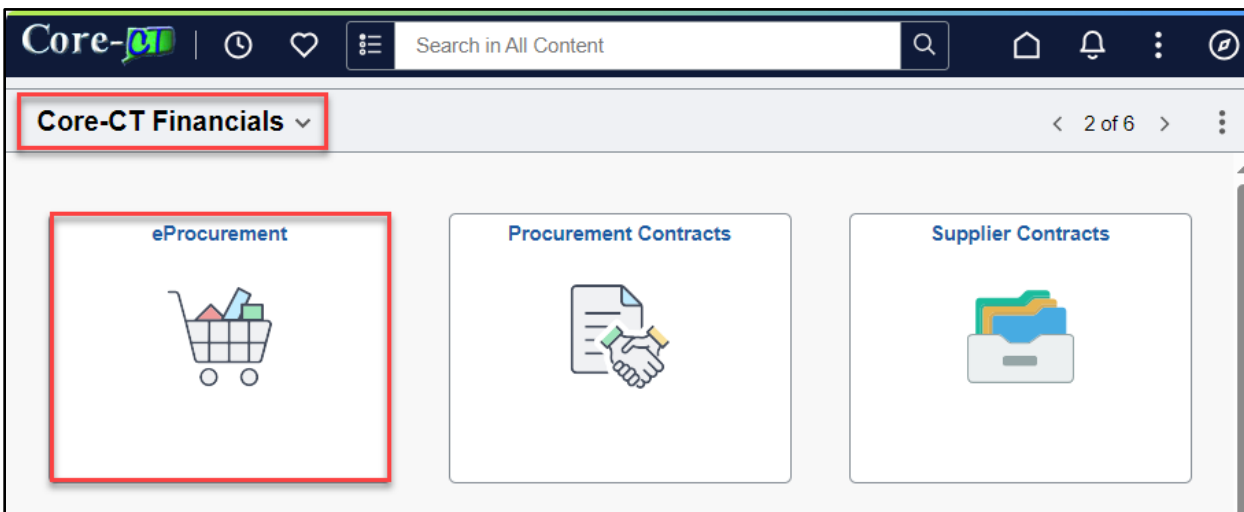
Navigation:

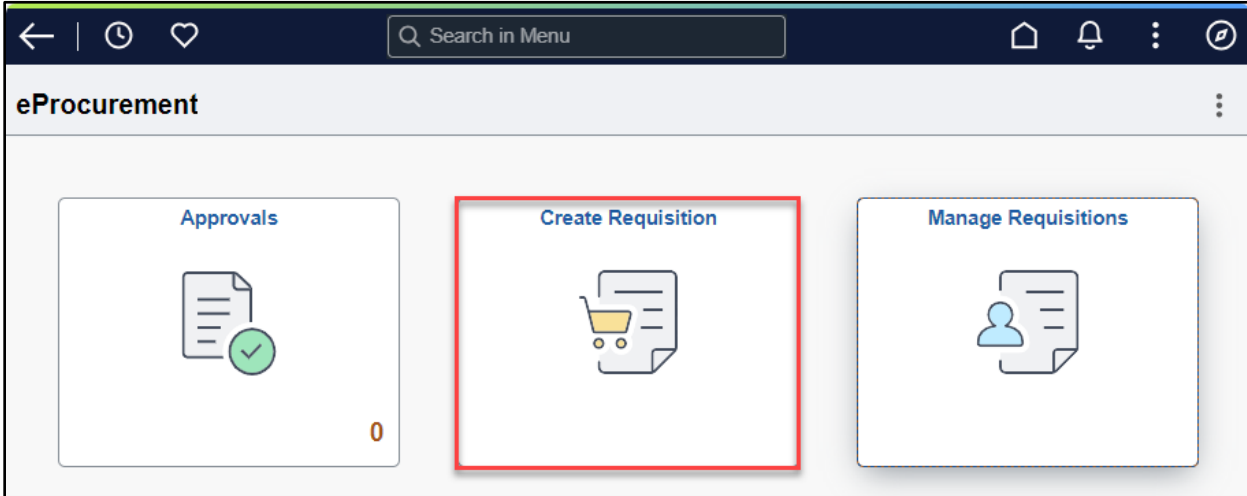**NavBar > Core-CT Financials > eProcurement > Create Requisition**

OR

Select **Core-CT Financials**
Click **eProcurement** Tile
Click **Create Requisition** Tile

Step	Action
1.	The **Create Requisition** page is displayed and defaults to the requester's purchasing business unit and the requester ID for the requisition. The page also provides fields to enter line defaults, shipping defaults, and distribution defaults for the requisition.
2.	Enter a name for the requisition in the **Requisition Name** field. If a name is not entered, then the system-generated Requisition ID is defaulted.
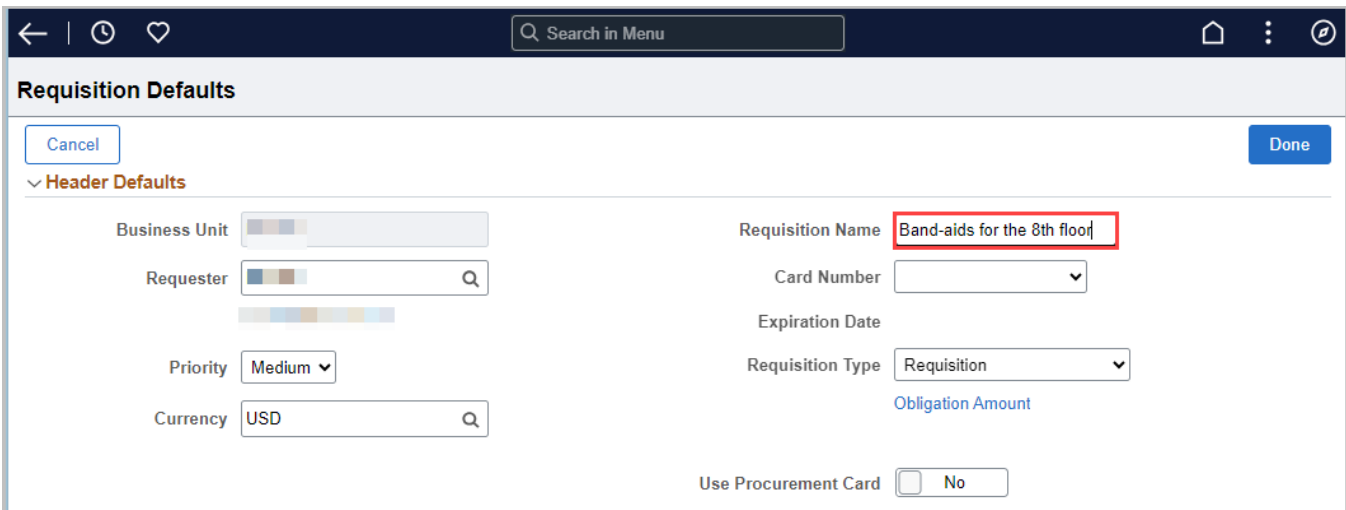
Step	Action
3.	If the Requester is a proxy to a procurement card, then the **Card Number** dropdown, **Expiration Date** field, and **Use Procurement Card** toggle are displayed. If not, the fields are not displayed.

Step	Action
4.	Use the Card Number dropdown to select a P-Card to add to the requisition. Click the **Card Number** dropdown list. Card Number [▾]
5.	Click the Card Number P-Card. (All cards the Requestor is assigned as a proxy will display) *********** (MC) ▾

Requisition Defaults

Cancel | Done
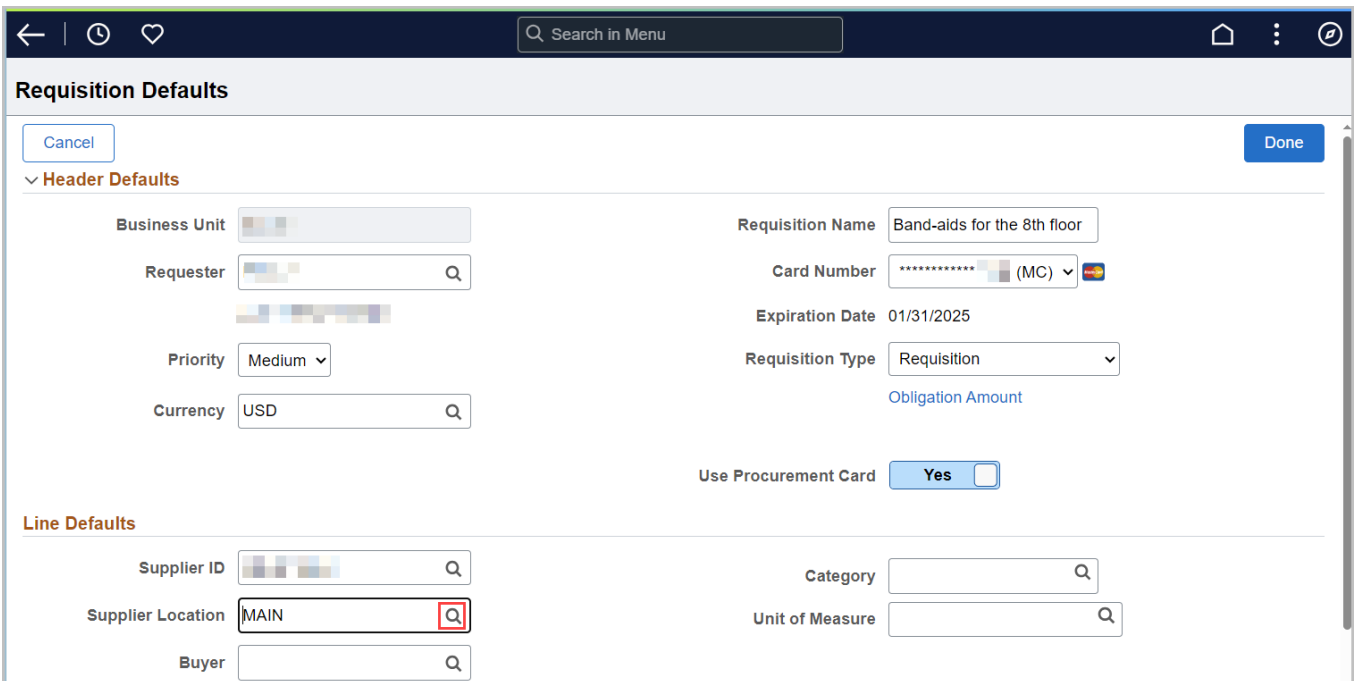
˅ Header Defaults

Business Unit		Requisition Name	Band-aids for the 8th floor
Requester	🔍	Card Number	************ (MC) ˅
		Expiration Date	
			************ (MC)
Priority	Medium ˅	Requisition Type	************ (MC) ˅
			************ (MC)
Currency	USD 🔍	Obligation Amount	

Step	Action
6.	When a P-Card is selected, the **Use Procurement Card** updates to Yes.
7.	Enter or search for a **Supplier ID** field.
8.	Click on the **Supplier Location** search icon.

Step	Action
9.	The Supplier Location Search Results will display. Suppliers may be set up with up to 3 additional locations, all of which will accept P-Cards: 1. PCARDPOS (PO Dispatch = Print) Swipe purchases that need to be reconciled. A requisition will be created for something already purchased. The PO will not get dispatched to the Supplier. It is for reconciliation purposes. 2. PCARDOPTIN (PO dispatch will match MAIN) A requisition will be created with this location if it is being paid for with a P-Card. 3. PUNCHOUT (PO dispatch = EDX) This location will be defaulted for Punch-Out requisitions that are being paid for with a P-Card. The MAIN and MAIN-ACH locations will not accept P-Cards

If the supplier does accept p-cards, but the location does not display, please complete a vendor request form and OSC/APD will update the supplier.

NOTE: Depending on the Supplier, the available locations may vary.

Step	Action
10.	When using a P-Card, the **Supplier Location** should be updated to either PCARDOPTIN or PCARDPOS.

Step	Action
11.	Enter or search for a **Buyer** for the requisition. This is a required field.

Step	Action
12.	The **Distribution Line** section is used to enter the chartfield accounting information, Inventory business unit, or Asset Information. Click the **Show All** tab.

Step	Action
13.	Enter the Distribution Values
14.	Use the Horizontal Scrollbar to view additional fields.
15	Once all fields have been populated, scroll to the top and click the **Done** button.

Step	Action
16.	You will be returned to the Create Requisition page to continue with adding items or services to the requisition.

Step	Action
17.	Continue with the Requisition as normal. Refer to the Requisition jobs aids for detailed steps.
18.	The Checkout page will display the card selected. It can be modified by selecting a different card number or removed by clicking on the Use Procurement Card.

Step	Action
18.	**End of Procedure.**