

About Supplier Conversations

Cardinal allows you to track ongoing discussions and conversations with supplier contacts. You can log the details about procurement, invoice, and payment issues that you are trying to resolve as well as document supplier inquiries by using the **Supplier Conversation** page.

Only users with the **Supplier Conversation Processor** roles can make updates to this page.

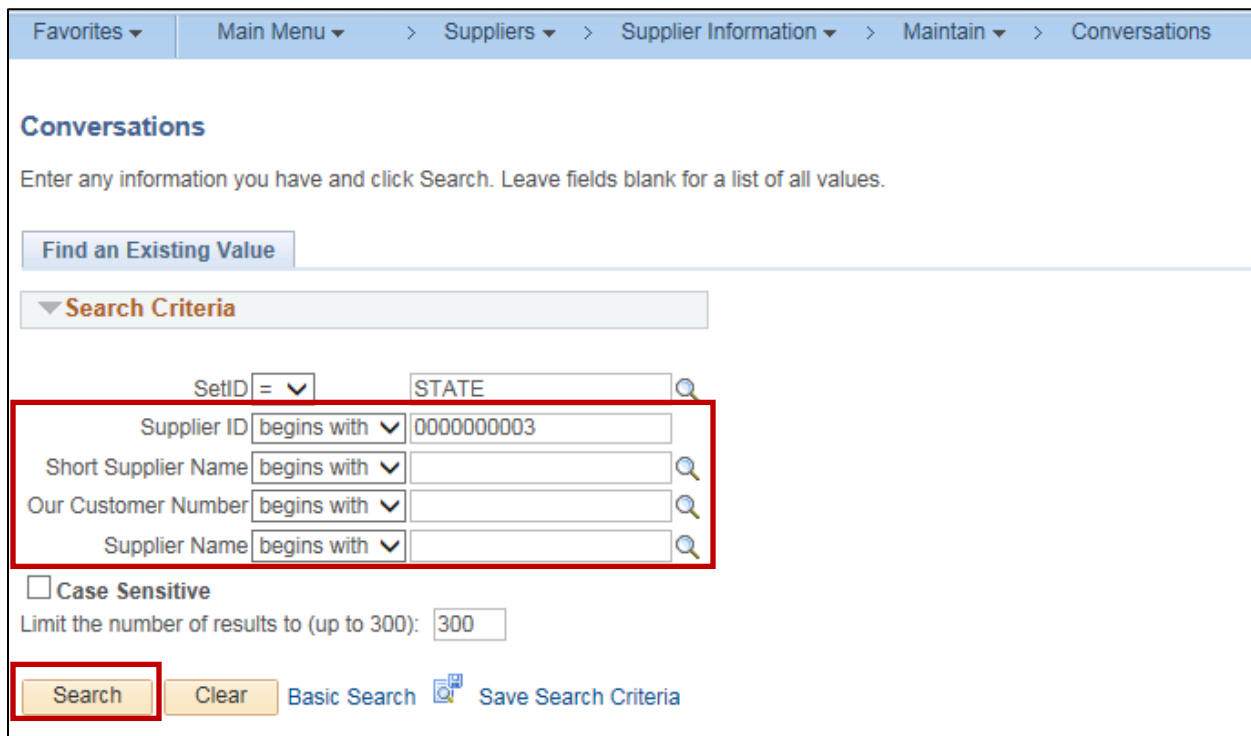
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To Record a Supplier Conversation

- 1 Navigate to the **Conversations** page using the following path:

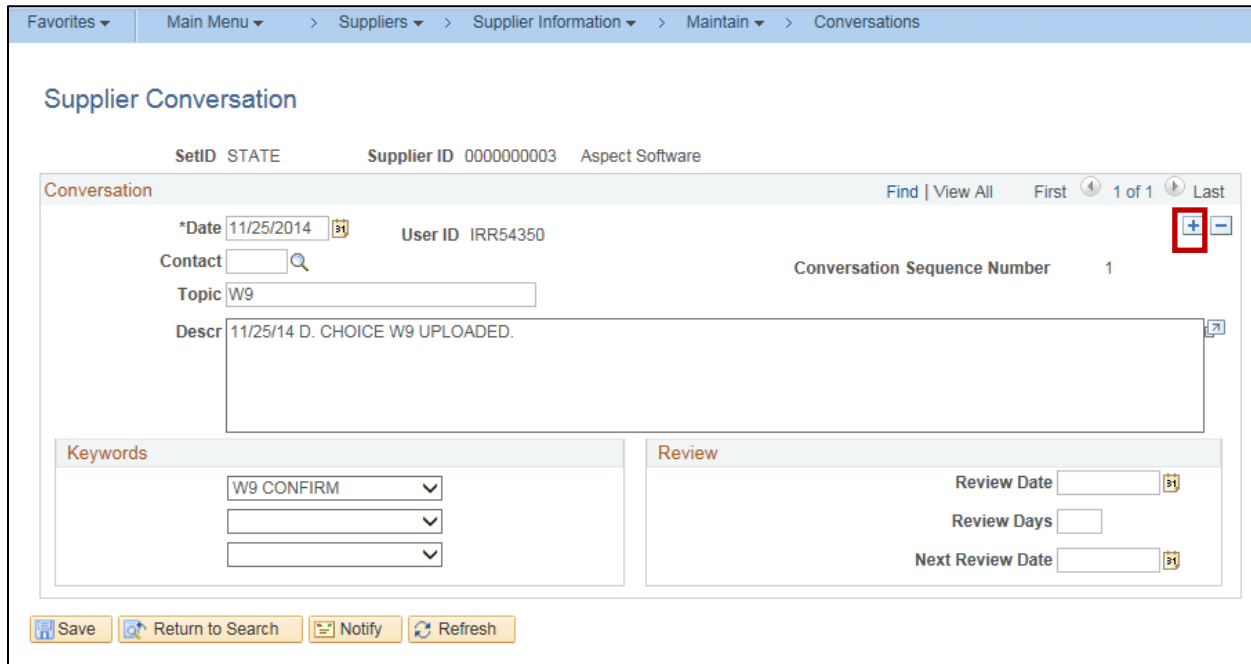
Main Menu > Suppliers > Supplier Information > Maintain > Conversations



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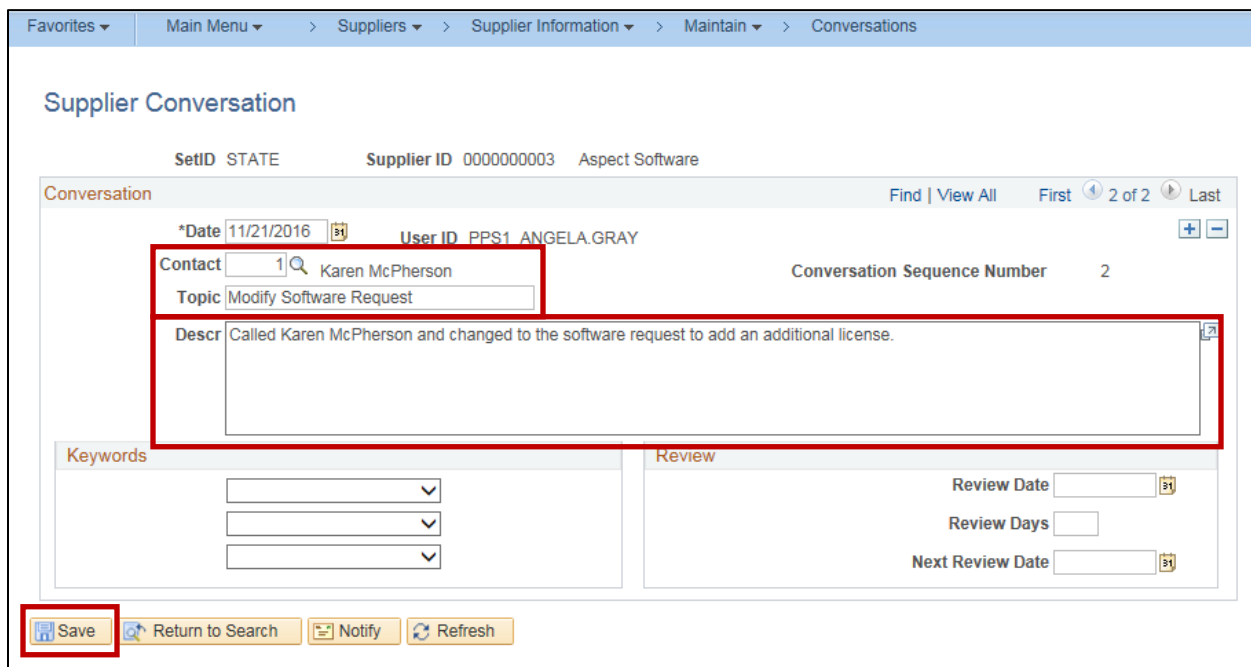
- 2 Enter search criteria for the desired supplier. For this example, **Supplier ID** is entered.
- 3 Click the **Search** button.

If a Search Results list displays, click the line to select the desired supplier.



The screenshot shows the 'Supplier Conversation' page for SetID STATE and Supplier ID 000000003 (Aspect Software). The 'Conversation' section shows a message with the following details: *Date 11/25/2014, User ID IRR54350, Contact (empty), Topic W9, and Descr 11/25/14 D. CHOICE W9 UPLOADED. The 'Conversation Sequence Number' is 1. A red box highlights the '+' button in the top right corner of the message area. Below the message are 'Keywords' (W9 CONFIRM) and 'Review' fields (Review Date, Review Days, Next Review Date). At the bottom are buttons for Save, Return to Search, Notify, and Refresh.

- 4 The **Supplier Conversation** page displays. If a message displays, click the **+** to add a new message.



The screenshot shows the 'Supplier Conversation' page for SetID STATE and Supplier ID 000000003 (Aspect Software). The 'Conversation' section shows a message with the following details: *Date 11/21/2016, User ID PPS1_ANGELA.GRAY, Contact Karen McPherson, Topic Modify Software Request, and Descr Called Karen McPherson and changed to the software request to add an additional license. The 'Conversation Sequence Number' is 2. A red box highlights the '+' button in the top right corner of the message area. Below the message are 'Keywords' and 'Review' fields (Review Date, Review Days, Next Review Date). At the bottom are buttons for Save, Return to Search, Notify, and Refresh. A red box also highlights the 'Save' button.

- 5 The **Date** fields populates with the current date.



Accounts Payable Job Aid

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- 6 The **User ID** defaults based on your Cardinal User ID.
- 7 In the **Contact** field, enter the ID for the supplier contact with whom you spoke. (Use the **Look Up Contact** icon if needed.)
- 8 In the **Topic** field, enter a brief (up to 30 characters) description of the topic you discussed if desired.
- 9 In the **Descr** field, enter a detailed description of the conversation. Make sure to include any agreements or conclusions that you reached.
- 10 In the **Keywords** section, select one or more keywords from the drop-down list(s) to identify the conversation if desired. This makes it easier to locate the conversation later.
- 11 If you want to review the conversation later (for example, to follow up with the supplier if needed), complete the fields in the **Review** section as desired. You can enter a **Review Date**, the number of **Review Days** from today, and/or a **Next Review Date**. These fields are for your information only.
- 12 Click the **Save** button.