



Recording Supplier Conversations Overview

Cardinal allows users to track ongoing discussions and conversations with supplier contacts on the **Supplier Conversation** page.

Only users with the **Supplier Conversation Processor (V_AP_COVA_VENDOR_CONVERSATION)** role can make entries on this page.

Assigned users can log the details about procurement, invoice, and payment issues as well as document supplier inquiries on the **Supplier Conversation** page.

Navigation Note: Please note that there may be a **Notify** button at the bottom of various pages utilized while completing the processes within this Job Aid. This “Notify” functionality is not currently turned on to send email notifications to specific users within Cardinal.

Table of Contents

Revision History	2
Record a Supplier Conversation	3



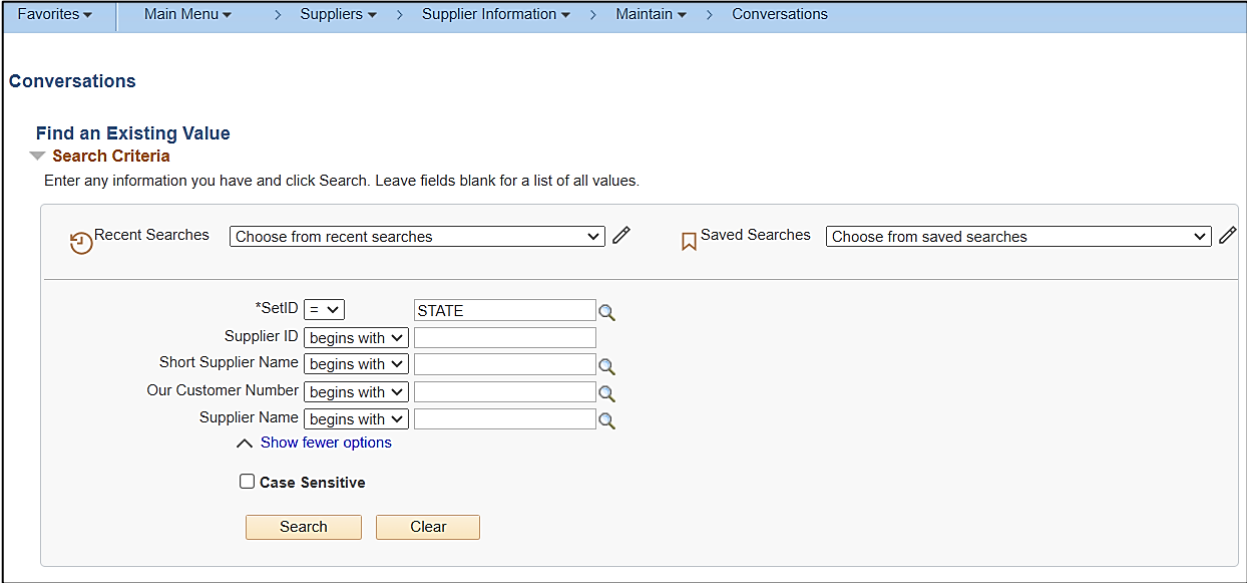


Accounts Payable Job Aid

AP312_Recording Supplier Conversations

Revision History

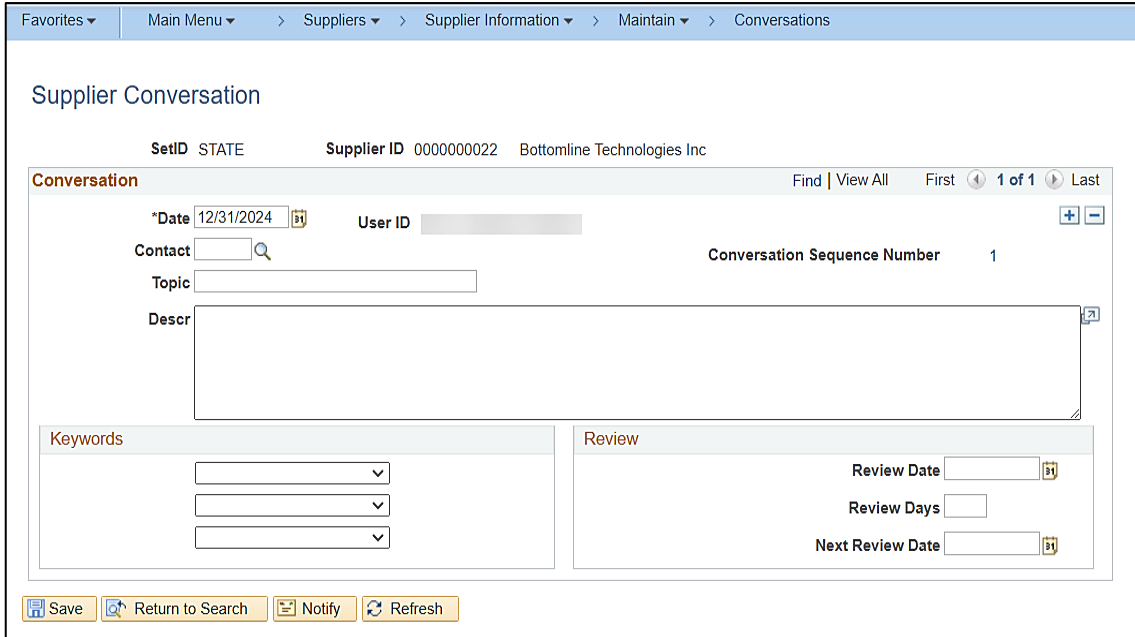
Revision Date	Summary of Changes
12/31/2024	Baseline

Record a Supplier Conversation


Step	Action
1.	Navigate to the Conversations page using the following path: Main Menu > Suppliers > Supplier Information > Maintain > Conversations
<p>The Conversations Search page displays.</p> 	
2.	Enter the supplier's Cardinal Supplier ID in the Supplier ID field. 
3.	Click the Search button. 

Step	Action
------	--------

The **Supplier Conversation** page displays.



4.	Enter or select the Contact in the Contact field. <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Contact <input style="width: 80px;" type="text"/> </div>
5.	Enter a brief description of the topic that was discussed in the Topic field. <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Topic <input style="width: 300px;" type="text"/> </div>
<div style="border: 1px solid blue; border-radius: 50%; width: 30px; height: 30px; display: flex; align-items: center; justify-content: center; margin: 0 auto;"> i </div>	This is a freeform field and allows up to 30 characters.
6.	Enter a detailed description of the conversation to include any agreements or conclusions in the Descr field. <div style="border: 1px solid red; padding: 5px; margin-top: 10px;"> Descr <input style="width: 550px; height: 40px;" type="text"/> </div>

Step	Action
7.	<p>In the Keywords section, select one or more keywords from the dropdown lists if desired.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="margin: 0;">Keywords</p> <div style="border: 1px solid #ccc; padding: 2px;"> <input style="width: 100%; height: 20px; margin-bottom: 2px;" type="text"/> <input style="width: 100%; height: 20px; margin-bottom: 2px;" type="text"/> <input style="width: 100%; height: 20px;" type="text"/> </div> </div>
	<p>This is not required; however, it can assist with locating a conversation later.</p>
8.	<p>To review the conversation at a later date (e.g., follow-up with the supplier if applicable), enter review information in the fields in the Review section.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <p style="margin: 0;">Review</p> <div style="border: 1px solid #ccc; padding: 2px; margin: 5px auto; width: fit-content;"> <p style="margin: 0;">Review Date <input style="width: 100%; height: 20px;" type="text"/> </p> <p style="margin: 0;">Review Days <input style="width: 100%; height: 20px;" type="text"/></p> <p style="margin: 0;">Next Review Date <input style="width: 100%; height: 20px;" type="text"/> </p> </div> </div> <ul style="list-style-type: none"> Review Date: Enter or select a specific date for the next follow up Review Day: Enter the total number of days from the current date to complete the next follow up Next Review Date: Enter or select a specific date for an additional review
9.	<p>Once all information has been entered, click the Save button.</p> <div style="border: 1px solid #ccc; padding: 5px; margin: 10px 0;"> <div style="display: flex; gap: 10px;"> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Save </div> <div style="border: 1px solid #ccc; padding: 2px; display: inline-block;"> Return to Search </div> </div> </div>