



Accounts Payable Job Aid

AP312 Recording Supplier Conversations

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.

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Revision History

Revision Date	Summary of Changes
9/1/2026	Updated to reflect the Cardinal system upgrades.
12/31/2024	Baseline.

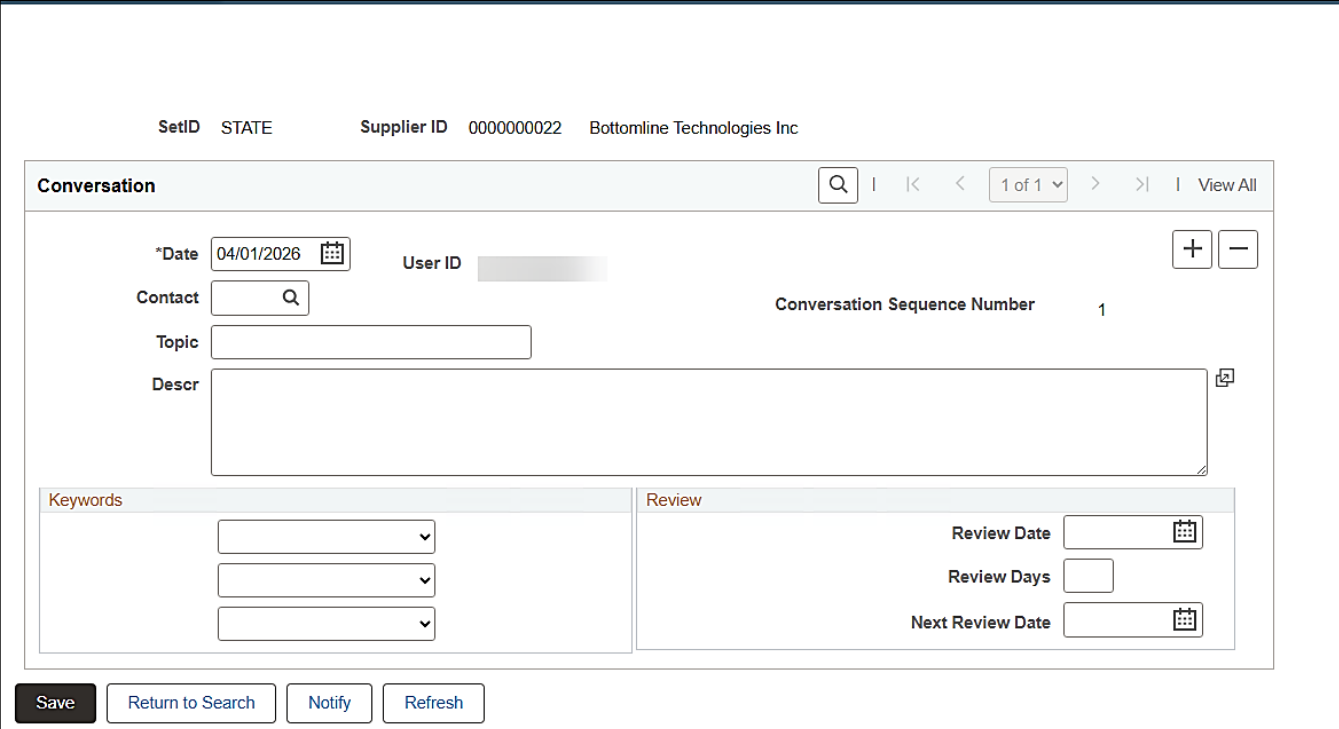


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Recording a Supplier Conversation

Step	Action
1.	Navigate to the Conversations page using the following path: NavBar > Menu > Suppliers > Supplier Information > Maintain > Record Supplier Conversations
	The Conversations Find an Existing Value Search page displays. ← Accounts Payable WorkCenter Conversations Find an Existing Value ▼ Search Criteria Enter any information you have and click Search. Leave fields blank for a list of all values. Recent Searches Choose from recent searches Saved Searches Choose from saved searches *SetID = Supplier ID begins with Short Supplier Name begins with Our Customer Number begins with Supplier Name begins with ^ Show fewer options ☐ Case Sensitive Search Clear
2.	Enter the supplier's Cardinal Supplier ID in the Supplier ID field. Supplier ID begins with
3.	Click the Search button. Search Clear
	For more information pertaining to the Cardinal FIN Search pages, refer to the Job Aid titled Overview of the Cardinal FIN Search Pages. This Job Aid is located on the Cardinal website in Job Aids under Learning.

Step	Action
	The Supplier Conversation page displays. 
	When the Supplier Conversation page displays and comments have been recorded for the Supplier, they will display. Click the Add a New Row (+) icon to add a new row in the Conversation section. For this scenario, there are no existing comments for the supplier. 
4.	Enter or select the contact in the Contact field. 
5.	Enter a brief description of the topic that was discussed in the Topic field. 
	This is a freeform field and allows up to 30 characters.

Step	Action
6.	Enter a detailed description of the conversation in the Descr field and include any agreements or conclusions. Descr
7.	Select one or more keywords from the dropdown lists in the Keywords section as applicable. Keywords
	Selecting Keywords is not required; however, they can assist with locating a conversation later.
8.	Enter the applicable information in the Review section fields to revisit the conversation later (e.g., follow-up with the supplier if applicable). Review Review Date Review Days Next Review Date • 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
	If the conversation does not require follow-up these fields can be left blank.
9.	Once all information has been entered, click the Save button. Save Return to Search Notify Refresh