

C15 - Define an action plan for low CSR ratings

Overview

As a Quality Manager, I verify the quality of the CSR for my zone and segment, and I define Action Plan.

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Step-By-Step

STEP 1

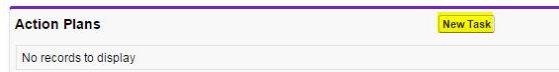
Open a low rated CSR assessment in the list.

To access to the CSR page you just clicked.

Flag	CSR ID	Account	CSR Assessment Name	Status	Is Active	Start To	Closed until	Closed Date	Created By
	08520202	ITALIA ITALIA SRL	Safety Convergence	Sent	✓	09/05/2019	14/09/2019	09/05/2019	Vincent.Vandecasteele.09/05/2019 11:51

STEP 2

Scroll down to the "Open Activities" related list of the CSR and click in "New Task".



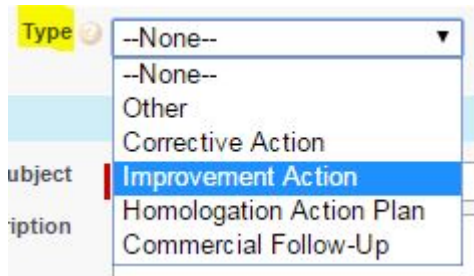
STEP 3

A new page opens. It's the New Task edit page. Your name is automatically added to the "Assigned To" field.

In the **Grouping field**, write the name of the Action Plan. Several tasks can have the same action plan name.

STEP 4

Choose the task type, for example "Improvement Action" in the field "Type".



STEP 5

Choose the **due date** in the related field.

STEP 6

Fill in a **subject** for the task. This is also the task name.

STEP 7

The related CSR Assessment is already displayed.

STEP 8

Then fill in the **GPS axis** if relevant. You can then find easily all tasks for a given segment or a given product...

STEP 9

If you want the supplier to connect and edit this task, just fill in his name and check the box **"Create Supplier Action"**. An e-mail will be automatically sent to the supplier

STEP 10

Save your task. Don't forget that you can find back all tasks with the same action plan name ("Grouping Field") just by typing the action plan name in the Convergence search.

The image shows a screenshot of a web form for creating a task in Convergence. The form is divided into several sections:

- Origin:** Contains fields for "CSR Assessment" (with value "CSR-0000283"), "Visit Minute", and "Other Origin".
- Axis:** Contains a field for "GPS Axis" with the value "TG-SAFETY AND PROTEC".
- Share with Account Contact:** Contains a field for "Name" with the value "Vincent VerbekePal" and a checkbox for "Create Supplier Action" which is checked. Below it is a "Supplier Action" field.
- Reminder:** Contains a field for "Reminder" with the value "14/09/2016" and a time dropdown set to "09:00".

At the bottom of the form, there are buttons: "Save", "Save & New Task", "Save & New Event", and "Cancel".

Related articles

- [A1910 - New task](#)
- [A1911 - Supplier's task](#)
- [A1220 - Navigation](#)

Need help

How to ask for assistance?

Dear Salesforce Convergence user,

For any question or issue regarding Convergence, please :

- create a request in **Service One** with the following information:
 - I want to update data in Convergence [Maintain data ownership in CONVERGENCE](#)
 - I want to mass upload procurement data [Maintain procurement data in CONVERGENCE](#)
 - Process : Data & Analysis
 - PTP-Subprocess: Purchasing Tools Support
 - PTP-Category: Convergence

For account creation, please refer to [here](#).

Thank you very much,

Convergence Team.