

A1912 - New task after a Visit Minute

Overview

In this section, you can see how to link a task to a Visit Minute.

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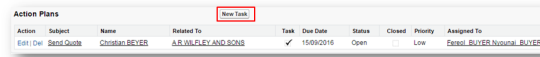
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Step-By-Step

STEP 1

Open your visit Minute eg. "VM-000142"

Scroll down to the "Action Plans" related list and click in "New Task"



STEP 2

1- In the "Grouping field", write the name of the Action Plan"

2- Choose a **Type** of Action in the view menu. eg. "Commercial Follow-Up"

3- By default, the "Status" is "Open"

4- Click on the "Subject" field and write the title of the task

5- Click on the "Description" field and write the description of the task

6- Click on the "Root Cause" field and write the Root Cause of the task, if it is relevant

7- Click on the "Follow-up / Comments" field and write some comments about the task, if it is relevant

8- In order to link a task to a specific GPS axis, Click on the "GPS Axis" magnifier, if it is relevant

9- The field "Visit Minute" is automatically populated with the VM code you choose. eg. "VM-000142"

10- Click on "Save"

A screenshot of the 'Task Information' form. It includes fields for 'Assigned To' (User), 'Due Date' (16/09/2016), 'Completion Date' (15/09/2016), 'Status' (Open), and 'Priority' (Low). The 'Related To' field is set to 'A.R. WILEY AND SONS'. The 'Grouping Field' is 'Malorum Ite Cicero' (callout 1), and the 'Type' is 'Corrective Action' (callout 2). Callout 3 points to the 'Status' dropdown, callout 4 to the 'Subject' field, callout 5 to the 'Description' field, and callout 6 to the 'Root Cause' field.

You can use the "grouping Field" as a label, in order to group different tasks for the same topic, same action plan... eg. a QM claim number.

A screenshot of the task form showing the 'Subject' field (callout 4), 'Description' field (callout 5), 'Root Cause' field (callout 6), and 'Follow Up / Comments' field (callout 7). Each field contains placeholder text.A screenshot of the 'Axis' form. It includes a 'GPS Axis' field with a magnifier icon (callout 8) and a 'Visit Minute' field (callout 9) containing the value 'VM-000142'. There are also fields for 'CSR Assessment' and 'Other Origin'.

Related articles

- [A1910 - New task](#)
- [A1911 - Supplier's task](#)
- [A1913 - New task after a CSR assessment](#)

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.