

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	In Action	Start To	Closed Until	Created Date	Created By
	CSR-5332023	ITALITALIA SRL	Survey (Convergence)	Sent	✓	08/05/2016	14/05/2016	08/05/2016	Ugolet.Vandellast@16092016 11:51

STEP 2

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

Action PlansNew Task

No records to display

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.

New Task

Task Edit

SaveSave & New TaskSave & New EventCancel

Task Information

Assigned ToUgolet

Related ToAccount

Grouping FieldAction plan for Fall

TypeNone

Due Date14/05/2016

Completion Date14/05/2016

StatusOpen

PriorityLow

Task Description

Subject

STEP 4

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

Type

--None--

--None--

Other

Corrective Action

Improvement Action

Homologation Action Plan

Commercial Follow-Up

STEP 5

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

Task Information

Assigned ToUgolet

Related ToAccount

Grouping FieldAction plan for Fall

TypeImprovement Action

Due Date14/05/2016

Completion Date14/05/2016

StatusOpen

PriorityLow

STEP 6

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

Task Description

SubjectTask for test

Description

Root Cause

Follow-Up / Comments

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 screenshot displays a multi-step form for creating a task in the Convergence system. The form is divided into several sections:

- Origin:** Contains fields for 'CSR Assessment' (with value 'CSR-00000283'), '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 'Name' field with the value 'Vincent VerbekePal' and a 'Create Supplier Action' checkbox which is checked. Below this is a 'Supplier Action' field.
- Reminder:** Contains a 'Reminder' field with the value '14/09/2016' and a time dropdown set to '08:00'.

At the bottom of the form, there are four 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.