

# 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   | Overall Result | Created Date | Created By                    |
|------|-------------|----------------|----------------------|--------|-----------|------------|----------------|--------------|-------------------------------|
|      | CSR-5332023 | ITALITALIA SRL | Survey (Convergence) | Sent   | ✓         | 08/05/2016 |                | 08/05/2016   | Ugolet.Vincenzo@italitalia.it |

### STEP 2

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

**Action Plans**New 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 Date11/05/2017

Completion Date11/05/2017

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 Date14/09/2016

Completion Date11/05/2017

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:   
1. **Origin**: Contains fields for 'CSR Assessment' (with a dropdown menu showing 'CSR-00000283') and 'Visit Minute'.   
2. **Axis**: Contains a field for 'GPS Axis' with a dropdown menu showing 'TG-SAFETY AND PROTEC'.   
3. **Share with Account Contact**: Contains a field for 'Name' (with a dropdown menu showing 'Vincent VerbekePal') and a checkbox for 'Create Supplier Action'.   
4. **Reminder**: Contains a field for 'Reminder' with a date picker set to '14/09/2016' and a time dropdown set to '08:00'.   
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.