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.

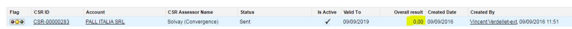
Table of content

Step-By-Step

STEP 1

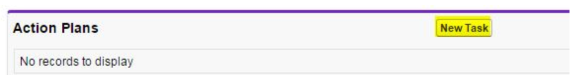
Open a low rated CSR assessment in the list.

To access to the CSR page you just clicked.



STEP 2

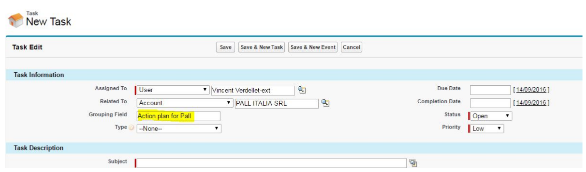
Scroll down to the **"Open Activities"** related list of the CSR and click in **"New Task"**.



STEP 3

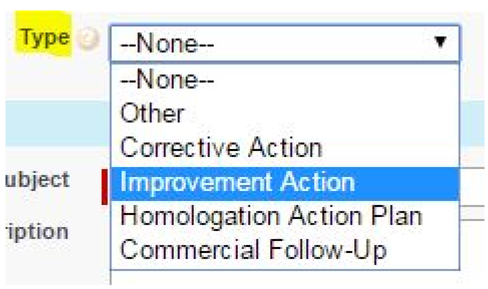
A new page opens. It's the New Task edit page. Your name is automatically added to the "Assigned To" field.

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



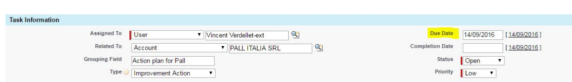
STEP 4

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



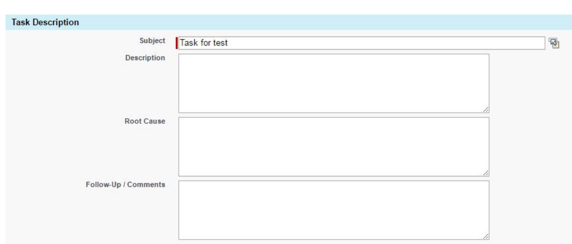
STEP 5

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

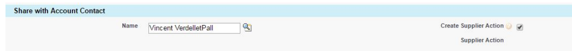
The related CSR Assessment is already displayed.

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...

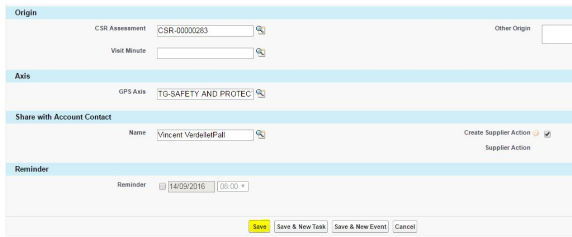
STEP 9

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.



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.