

A1911 - Supplier's task

Overview

You can involve your supplier directly in this process by sending him a link to his tasks : he can then connect to Convergence and manage them

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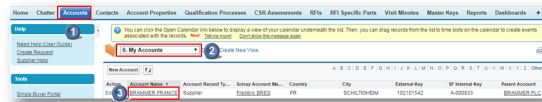
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Step-By-Step

STEP 1

Account Owner you can Create "New task"

- 1- In Tabs => Click on "Accounts"
- 2- In View Menus => Select "My Accounts"
- 3- Click on "Account" BRAMMER FRANCE



STEP 2

Scroll down to the "Open Activities" and Click on **Edit** " related the task, that I want to send to the supplier"

Action	Subject	Flag	Assigned To	Create Date	Due Date	Status	Name	CSR Assessment
Edit	Send quotation		Ferrel NYOUNAI	9/11/2016	10/11/2016	Task: Open		

STEP 3

- Scroll down to the "Task " **Send quotation**" related Share with Account Contact

1 - Click on the "Name" magnifier (Click on the lookup field. Write the name of the contact or the supplier you are searching. Choose "All Fields" in the "Search" requirements under the lookup window. Click "Go!"
Click on the contact **name** => The name of the contact is automatically added to the "Name" field

2 - Tick the box "Create Supplier Action" " little square box to engage the supplier in the process

- **NB** , you have possibility to attach file

3 - Click on **Save**

Related articles

- [A1910 - New task](#)
- [A1912 - New task after a Visit Minute](#)
- [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.