

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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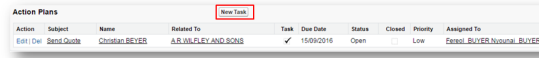
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Step-By-Step

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

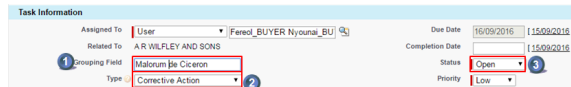
6- Click on the "Root Cause" field and write the Root Cause of the task, if it is relevant

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"



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.



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.