

A1913 - New task after a CSR assessment

Overview

In this section, you can see how to link a task to a CSR assessment.

Table of content

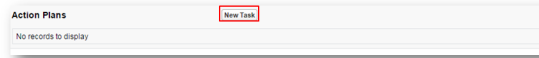
- [Step-By-Step](#)
- [Related articles](#)
- [Need help?](#)
 - [How to ask for assistance?](#)

Step-By-Step

STEP 1

Open your CSR assessment eg. "CSR-00000285"

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- Click on the "Status" field and choose "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

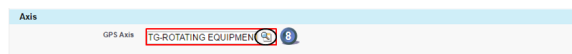
8- In order to link a task to a specific GPS axis, Click on the "GPS Axis" magnifier, if it is relevant

9- The field "CSR Assessment" is automatically populated with the VM code you choose. eg. "CSR-00000283"

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

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.