A1910 - New task

Overview

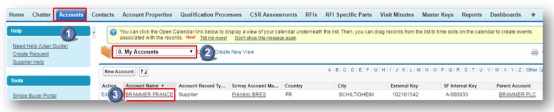
Tasks help you to track the activities with your suppliers, and to follow up action plans linked to CSR results or Visit Minutes.

Table of content

Step-By-Step

How create task, use grouping field ?

STEP 1



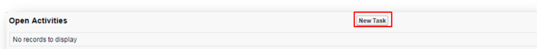
From an Account, Create "**New task**"

1- In Tabs => Click on "**Accounts**"

2- In View Menus => Select "**My Accounts**"

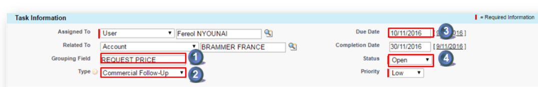
3- Click on "Account" BRAMMER FRANCE

STEP 2



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

STEP 3



1- In the "**Grouping field**", write the name of the Action Plan.

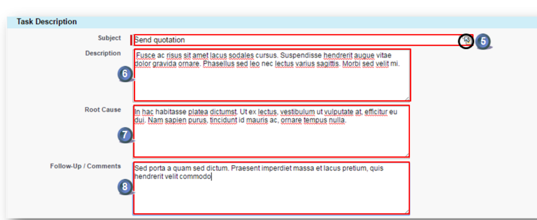
You can use the **"grouping Field**" as a label, in order to group different tasks for the same topic, same action plan... eg. a QM claim number.

2- Choose a **Type** of Action in the view menu. eg."Commercial Follow-Up"

3- Choose the "**due date**" in the related field

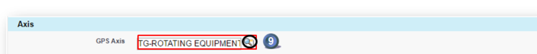
4- By default, the "**Status**" is "Open"

5- Click on the "**Subject**" field and write the title of the task



6- Click on the "**Description**" field and write the description of the task

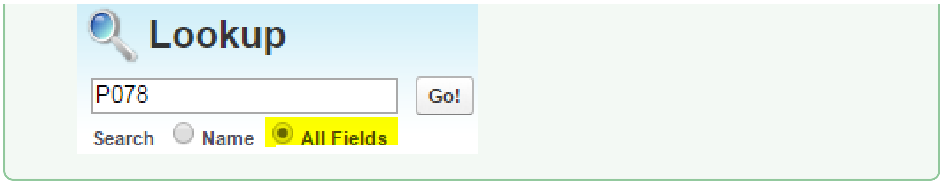
7- Click on the "**Root Cause**" field and write the Root Cause of the task, if it is relevant



8- Click on the **"Follow-up / Comments**" field and write some comments about the task, if it is relevant

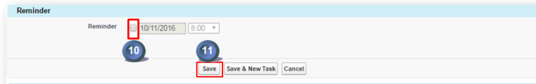
In Lookup: select always "all fields" This allows for more results in research

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



10- **Desactivate** the Reminder by clicking on the "Reminder" little square box

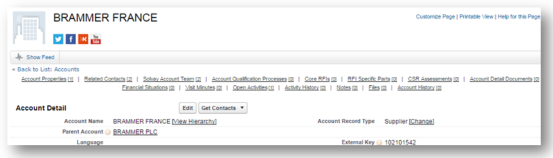
11- Click on "**Save**"



Verify, if I created task

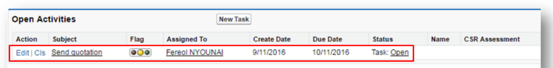
STEP 4

- After saving, I return automatically on the tab "**Accounts**" with the account name you create task



STEP 5

- I verify, if I created well the task to my Account eg. “BRAMMER FRANCE”



Scroll down to the "**Open Activities**“ and you see your task create or No

(The task is created with Open Status)

Related articles

- A1911 - Supplier's 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.