

# A1913 - New task after a CSR assessment

## Overview

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

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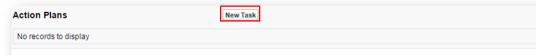
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## Step-By-Step

### STEP 1

Open your CSR assessment eg. "CSR-00000285"

Scroll down to the "Action Plans" related list and click in "New Task"

The screenshot shows a table header for 'Action Plans' with a 'New Task' button in the top right corner. Below the header, it says 'No records to display'.

### 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

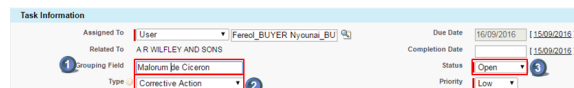
6- Click on the "Root Cause" field and write the Root Cause of the task, if it is relevant

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

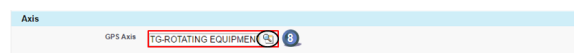
8- In order to link a task to a specific GPS axis, Click on the "GPS Axis" magnifier, if it is relevant

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

10- Click on "Save"

The screenshot shows the 'Task Information' form. Annotations include: 1. 'Grouping Field' (A.R. WILFLEY AND SONS), 2. 'Type' (Corrective Action), 3. 'Status' (Open), 4. 'Subject' (Send Letter), 5. 'Description' (Ud enim ad minim veniam, quis nostrud exercitation ullamco laboris nisi ut aliquip ex ea commodo consequat), 6. 'Root Cause' (Encepsur sint occaecat cupidatat non proident, sunt in culpa qui officia deserunt mollit anim id est laborum), 7. 'Follow-up / Comments' (Mauris id enim, Cum fusce nonet sit aringher odoz conpael tinn impedit que minus id quod maxime placeat facere possimus, omnis voluptas assumenda est, omnis dolor repellendus).

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.

The screenshot shows the 'Task Information' form with the 'Subject' field highlighted and annotated with a red box and the number 4. The subject is 'Send Letter'.The screenshot shows the 'Axis' section with the 'GPS Axis' field highlighted and annotated with a red box and the number 8. The value is 'TG-ROTATING EQUIPMENT'.The screenshot shows the 'Origin' section with the 'CSR Assessment' field highlighted and annotated with a red box and the number 9. The value is 'CSR-00000283'.

## 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.