A1913 - New task after a CSR assessment

Overview

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

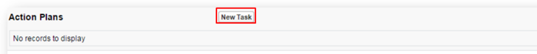
Table of content

Step-By-Step

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"

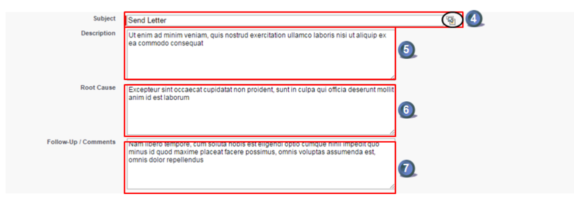
3- Click on the "**Status**" field and choose "Open“

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.

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

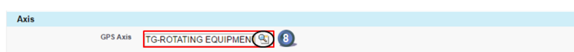
5- Click on the "**Description**" field and write the description of the task

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**"

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.