

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.

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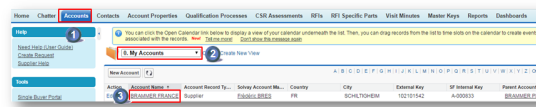
Step-By-Step

How create task, use grouping field ?

STEP 1

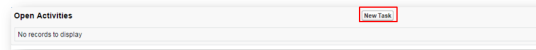
From an Account, Create "New task"

- 1- In Tabs => Click on "Accounts"
- 2- In View Menus => Select "My Accounts"
- 3- Click on "Account" BRAMMER FRANCE



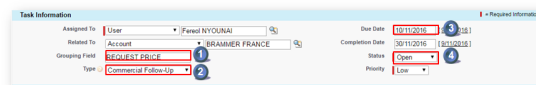
STEP 2

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

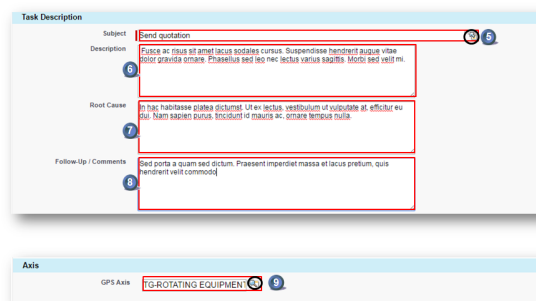


STEP 3

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



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.



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"

Action	Subject	Flag	Assigned To	Create Date	Due Date	Status	Name	CSR Assessment
Edit	Send quotation		External NOCOUNAI	9/11/2016	10/11/2016	Task: Open		

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.

