

# A1911 - Supplier's task

## Overview

You can involve your supplier directly in this process by sending him a link to his tasks : he can then connect to Convergence and manage them

## Table of content

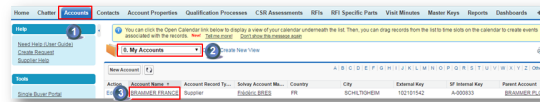
- [Step-By-Step](#)
- [Related articles](#)
- [Need help?](#)
  - [How to ask for assistance?](#)

## Step-By-Step

### STEP 1

Account Owner you can 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" and Click on **Edit** " related the task, that I want to send to the supplier"

| Open Activities |                |      |                |             |            |            |      |                |  |
|-----------------|----------------|------|----------------|-------------|------------|------------|------|----------------|--|
| Action          | Subject        | Flag | Assigned To    | Create Date | Due Date   | Status     | Name | CSR Assessment |  |
| <b>Edit</b>     | Send quotation |      | Ferret NYOUNAI | 9/11/2016   | 10/11/2016 | Task: Open |      |                |  |

### STEP 3

- Scroll down to the "Task " **Send quotation** related Share with Account Contact

1 - Click on the "Name" magnifier (Click on the lookup field. Write the name of the contact or the supplier you are searching. Choose "All Fields" in the "Search" requirements under the lookup window. Click "Go!"  
Click on the contact **name** => The name of the contact is automatically added to the "Name" field

2 - Tick the box "Create Supplier Action" " little square box to engage the supplier in the process

- **NB** , you have possibility to attach file

3 - Click on **Save**

## Related articles

- [A1910 - New 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.*