

A1612 - New Solvay historical CSR

Overview

This features allow you to takeover an old Excel CSR assessment and add it to Convergence.

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CSR questionnaire should be made at **Supplier Group** level, and is valid for all suppliers of the group.

Step-By-Step

STEP 1

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

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

3- In ListViews => Click on **"Account"**
eg A R WILFLEY AND SONS

STEP 2

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New CSR Assessment

Select a record type

- Solvay CSR Questionnaire
The Standardized Solvay CSR Questionnaire is a list of questions to be completed by the supplier (self-assessment) designed to be a first check of supplier performance on CSR/Sustainability.
- Solvay CSR Questionnaire (Historical)**
The Solvay CSR Questionnaire (historical) are the results of Solvay CSR Questionnaires obtained before launch of Convergence (October 2016).

Cancel

Next

On the supplier group page, scroll down to the **"CSR Assessments"** related list and click in the button **"New"**.

Choose **Solvay CSR Questionnaire (historical)**.

Click on the **"Next"** button

STEP 3

New CSR Assessment: Solvay CSR Questionnaire (Historical)

1- Verify that the name of your supplier is the right one on the field **"Account"**.

2- Verify that the CSR **"is Active"**.

3- In the field at the right side:
"Valid From": by default today, but you can change and choose the date you want the CSR to be valid from

CSR ID	Is Active
Record Type	Valid From
Solvay CSR Questionnaire (Historical)	11/09/2018
Account	Valid To
SAP SE	10/09/2021
Domain	
Search Master Keys...	
CSR Score	Overall result
Cancel	Save & New
	Save

"Valid To": by default it is valid for 3 years, but you can change and chose the date you want the CSR to be valid to.

4- Enter the grade (between 0,00 and 4,00)

5- Click in the button **"Save"** at the top of the page

You can attach any file to this historical CSR.

Related articles

- [A1611 - Third party 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.