

A3015 - Help for controllers

Overview

As a controller, you will be notified each time you need to review an Action and its Benefits.

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Where to start

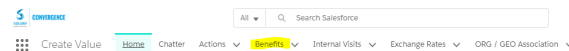
STEP 1

Open app "**Create Value**"

blocked URL

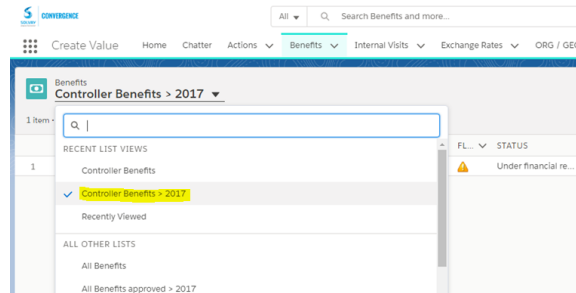
STEP 2

Go to tab 'Benefits'



STEP 3

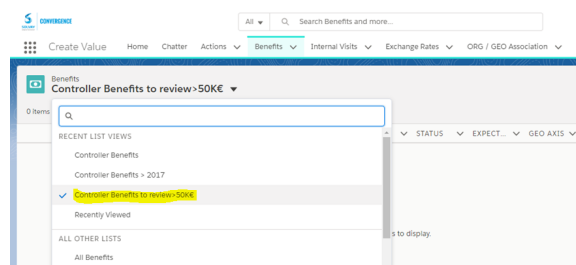
Choose view "Controller Benefits >2017"



STEP 4

All your Benefits, already reviewed or not are displayed.

Choose view "Controller Benefits to review >50K€" to only display Benefits to review.



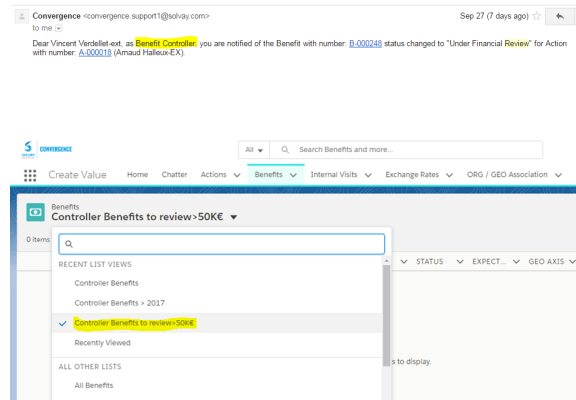
How to review an Action and its Benefits

STEP 1

Either you directly go to the Action from the email notification you received...

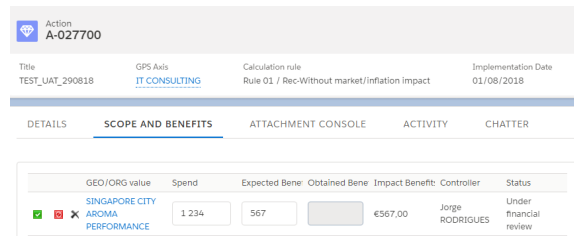
STEP 2

...Or you choose view "Controller Benefits to review >50K€" to display Benefits to review.



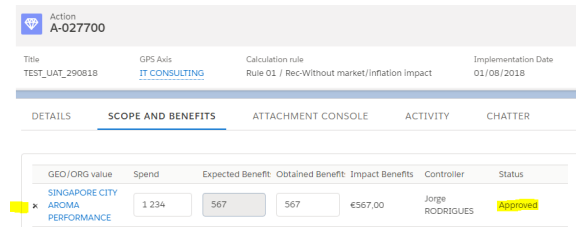
STEP 3

Open the Action to be reviewed and go to tab "Scope & Benefits"



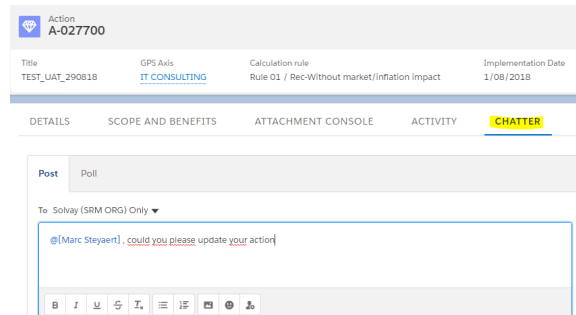
STEP 4

Click on the green icon to approve or the red one to reject. No further action is required. Repeat the same process for each Benefit to be approved.



STEP 5

Use Chatter to collaborate with your buyer on this Action if he or she needs to improve or update it.



STEP 6

If you need to change your review, let's say from Approved to Rejected, open the Benefit first by clicking on its GEO /ORG value.

GEO/ORG value	Spend	Expected Benefit	Obtained Benefit	Impact Benefits	Controller	Status
SINGAPORE CITY AROMA PERFORMANCE	1.234	567	567	€567.00	Jorge RODRIGUES	Approved

STEP 7

Then change Benefit status and save it.

Benefit Id: B-057170
Action: A-027700
Action Title: TEST_UAT_290818
Flag:

Status: **Rejected**

Buttons: Cancel, Save

How to mass validate Actions & Benefits

STEP 1

Go to Tab 'Benefits'

Choose view "Controller Benefits to mass validate <50K€" to display Benefits to review in mass.

Benefits
Controller Benefits to massvalidate<50K€

RE...	FL...	STATUS
1	Under financial re...	Under financial re...
2	Under financial re...	Under financial re...

STEP 2

Select Benefits you would like to approve in mass

Benefits
Controller Benefits to massvalidate<50K€

RE...	ACTION	ACTION TITLE	OWNER OF ...	IMPLEME...	FL...	STATUS	EXPE...	GEO AXIS	E...	O...	C...
1	B-057170	A-027700	TEST_UAT_290818	Yvonne Petri-ent	1/08/2018	Under financial re...	567.00	SINGAPORE CITY	567		EUR
2	B-057171	A-027700	TEST_UAT_290818	Yvonne Petri-ent	1/08/2018	Under financial re...	563.00	PARIS	563		EUR

STEP 3

Double click on the pen, next to Benefit Status

Benefits
Controller Benefits to massvalidate<50K€

RE...	ACTION	ACTION TITLE	OWNER OF ...	IMPLEME...	FL...	STATUS	EXPE...	GEO AXIS	E...	O...	C...
1	B-057170	A-027700	TEST_UAT_290818	Yvonne Petri-ent	1/08/2018	Under financial re...	567.00	SINGAPORE CITY	567		EUR
2	B-057171	A-027700	TEST_UAT_290818	Yvonne Petri-ent	1/08/2018	Under financial re...	563.00	PARIS	563		EUR

STEP 4

Choose status

Benefits
Controller Benefits to massvalidate<50K€

RE...	ACTION	ACTION TITLE	OWNER OF ...	IMPLEME...	FL...	STATUS	EXPE...	GEO AXIS	E...	O...	C...
1	B-057170	A-027700	TEST_UAT_290818	Yvonne Petri-ent	1/08/2018	Under financial re...	567.00	SINGAPORE CITY	567		EUR
2	B-057171	A-027700	TEST_UAT_290818	Yvonne Petri-ent	1/08/2018	Under financial re...	563.00	PARIS	563		EUR

STEP 5

Click on "All ... selected records", "Apply" and "Save".

Benefits
Controller Benefits to massvalidate-50K€

2 items selected

	BENE.	ACTION	ACTION TITLE	OWNER OF	IMPLEME.	FL.	STATUS	EXPE.	GEO AXIS	E.	O.	C.
1	✓ B-057170	A-027700	TEST_LHFC_200608	Yvonne Pettkant	1/08/2018		Under financial review		CITY	567		EUR
2	✓ B-057171	A-027700	TEST_LHFC_200608	Yvonne Pettkant	1/08/2018		Under financial review		SA3			EUR

Cancel Apply

STEP 6

All Benefits are now validated.

Benefits
Controller Benefits to massvalidate-50K€

2 items selected

	BENE.	ACTION	ACTION TITLE	OWNER OF	IMPLEME.	FL.	STATUS	EXPE.	GEO AXIS	E.	O.	C.
1	✓ B-057170	A-027700	TEST_LHFC_200608	Yvonne Pettkant	1/08/2018		Approved	567.00	SINGAPORE CITY	567		EUR
2	✓ B-057171	A-027700	TEST_LHFC_200608	Yvonne Pettkant	1/08/2018		Approved	543.00	RMBS	543		EUR

Related articles

- [B - Salesforce terminology](#)
- [A11 - Introduction to Convergence](#)

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](#).