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

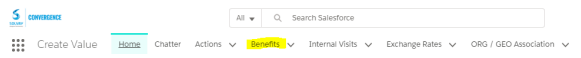
STEP 1

Open app "**Create Value**"

blocked URL

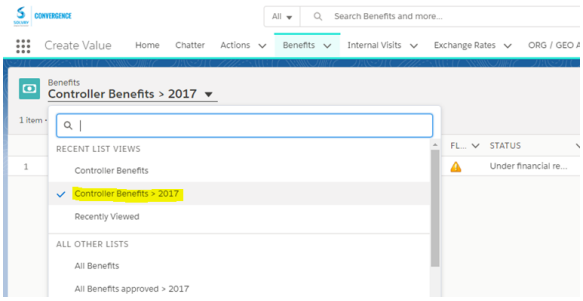
STEP 2

Go to tab 'Benefits'



STEP 3

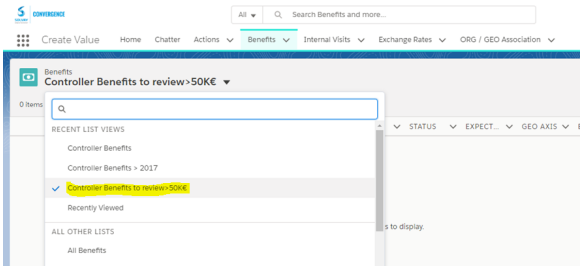
Choose view "Controller Benefits >2017"



STEP 4

All your Benefits, already reviewed or not are displayed.

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



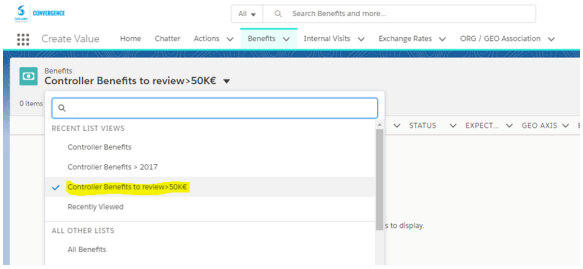
How to review an Action and its Benefits

STEP 1

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

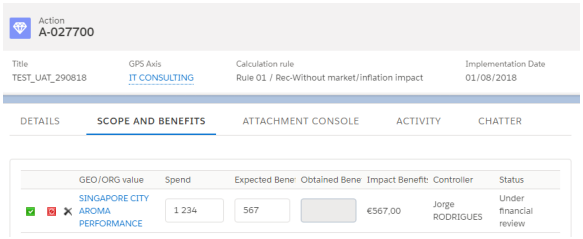
STEP 2

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



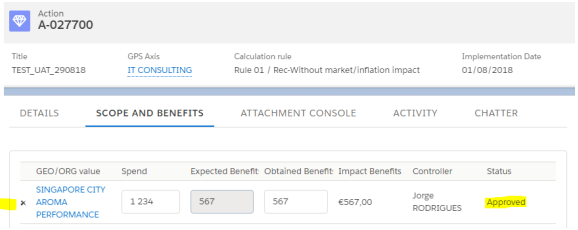
STEP 3

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



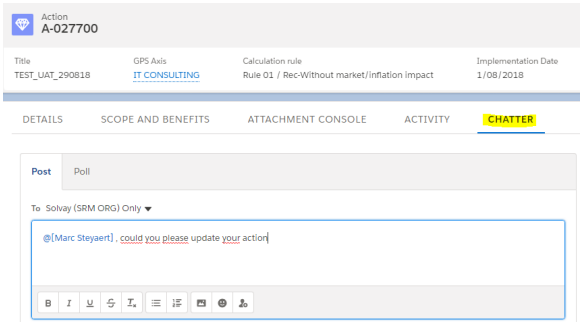
STEP 4

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



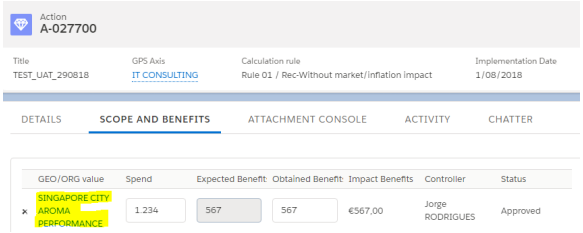
STEP 5

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



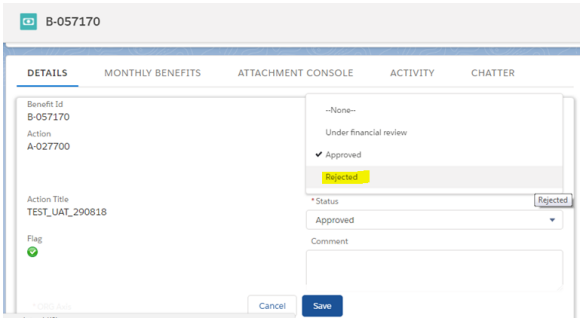
STEP 6

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.



STEP 7

Then change Benefit status and save it.

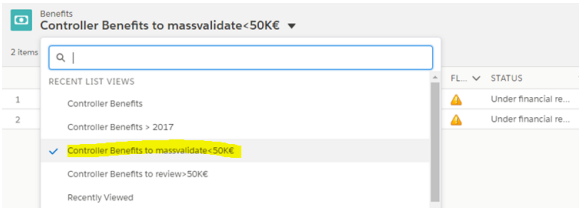


How to mass validate Actions & Benefits

STEP 1

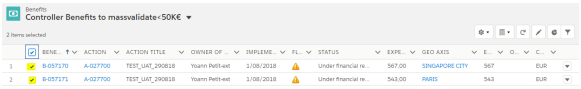
Go to Tab 'Benefits'

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



STEP 2

Select Benefits you would like to approve in mass

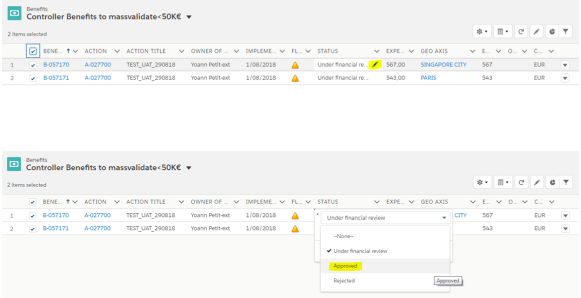


STEP 3

Double click on the pen, next to Benefit Status

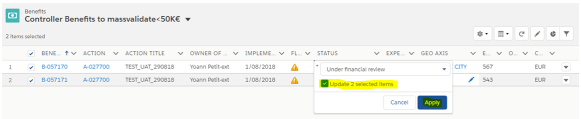
STEP 4

Choose status



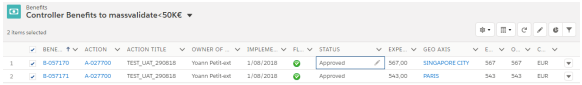
STEP 5

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



STEP 6

All Benefits are now validated.



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.