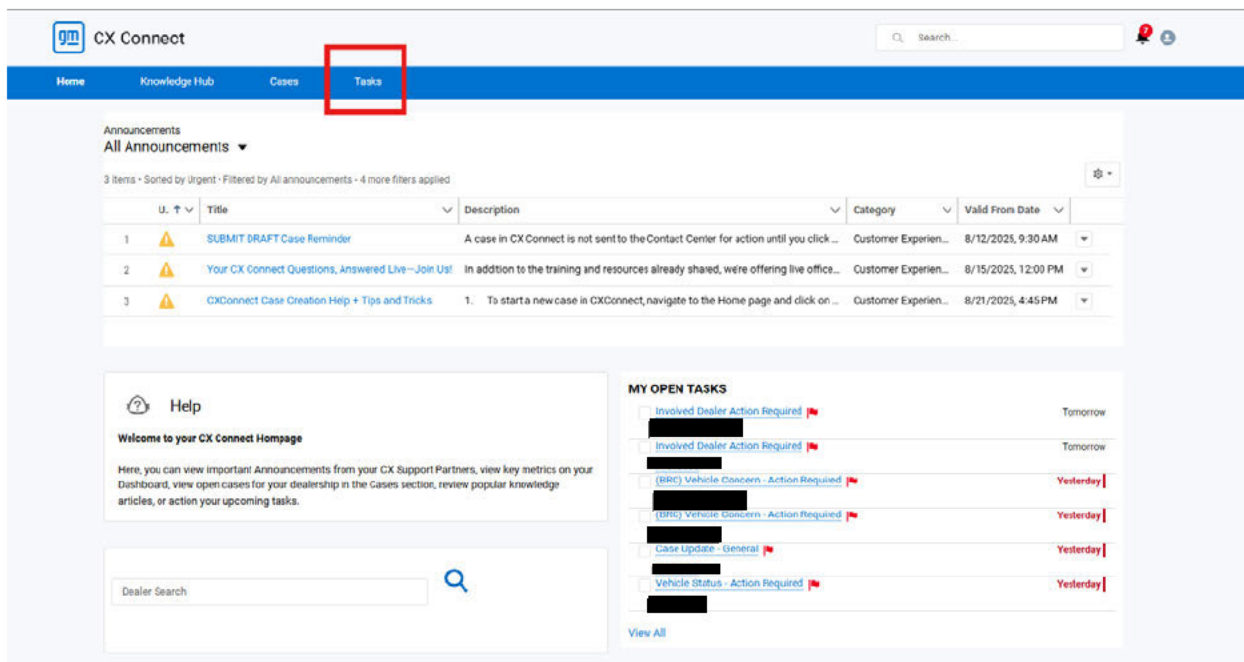


CX Connect CRM User: How to Locate and Action a Task

1) Select Tasks from the Home page



The screenshot shows the CX Connect Home page. The top navigation bar includes 'Home', 'Knowledge Hub', 'Cases', and 'Tasks'. The 'Tasks' tab is highlighted with a red box. Below the navigation bar, there are sections for 'Announcements', 'Help', and 'MY OPEN TASKS'.

Announcements
All Announcements ▾
3 Items • Sorted by Urgent • Filtered by All announcements • 4 more filters applied

U. ▴ ▾	Title	Description	Category	Valid From Date
1	⚠ SUBMIT DRAFT Case Reminder	A case in CX Connect is not sent to the Contact Center for action until you click...	Customer Experien...	8/12/2025, 9:30 AM
2	⚠ Your CX Connect Questions, Answered Live—Join Us!	In addition to the training and resources already shared, we're offering live office...	Customer Experien...	8/15/2025, 12:00 PM
3	⚠ CXConnect Case Creation Help + Tips and Tricks	1. To start a new case in CXConnect, navigate to the Home page and click on ...	Customer Experien...	8/21/2025, 4:45 PM

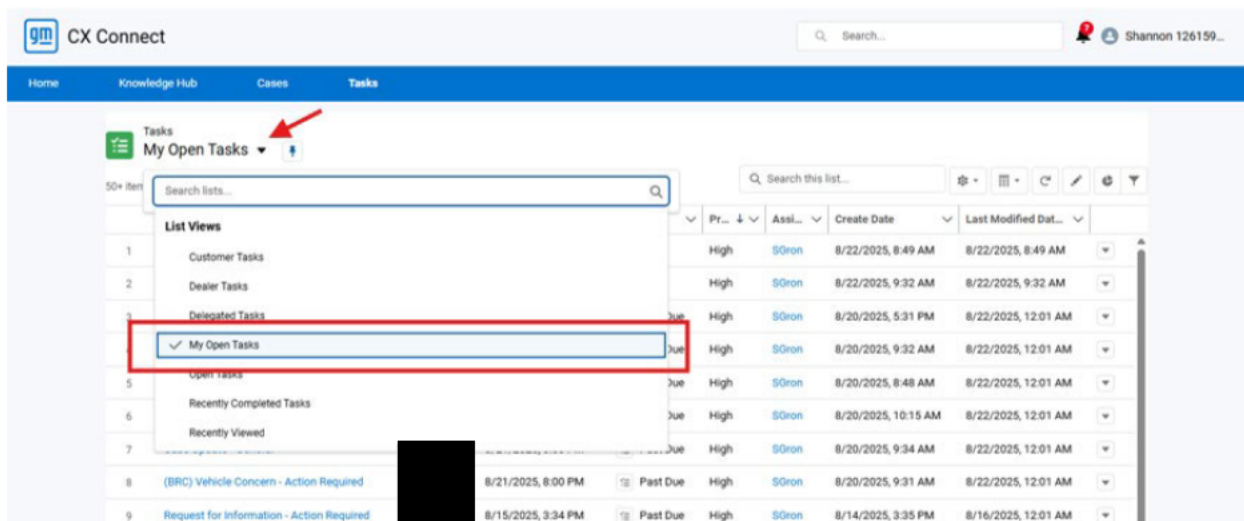
Help
Welcome to your CX Connect Homepage
Here, you can view important Announcements from your CX Support Partners, view key metrics on your Dashboard, view open cases for your dealership in the Cases section, review popular knowledge articles, or action your upcoming tasks.

MY OPEN TASKS

- Involved Dealer Action Required [Red Flag] Tomorrow
- Involved Dealer Action Required [Red Flag] Tomorrow
- (BRC) Vehicle Concern - Action Required [Red Flag] Yesterday
- Office Vehicle Concern - Action Required [Red Flag] Yesterday
- Case Update - General [Red Flag] Yesterday
- Vehicle Status - Action Required [Red Flag] Yesterday

View All

2) Locate your 'My Open Tasks' list view by selecting the drop-down carrot



The screenshot shows the CX Connect Tasks page. The 'Tasks' tab is selected in the top navigation bar. The 'My Open Tasks' list view is selected from the 'List Views' dropdown menu, which is highlighted with a red box. A red arrow points to the dropdown arrow icon.

Tasks
My Open Tasks ▾

Search lists...

List Views

- Customer Tasks
- Dealer Tasks
- Delegated Tasks
- My Open Tasks (Selected)
- Open Tasks
- Recently Completed Tasks
- Recently Viewed

Search this list...

Pr...	Assl...	Create Date	Last Modified Dat...
High	SGron	8/22/2025, 8:49 AM	8/22/2025, 8:49 AM
High	SGron	8/22/2025, 9:32 AM	8/22/2025, 9:32 AM
High	SGron	8/20/2025, 5:31 PM	8/22/2025, 12:01 AM
High	SGron	8/20/2025, 9:32 AM	8/22/2025, 12:01 AM
High	SGron	8/20/2025, 8:48 AM	8/22/2025, 12:01 AM
High	SGron	8/20/2025, 10:15 AM	8/22/2025, 12:01 AM
High	SGron	8/20/2025, 9:34 AM	8/22/2025, 12:01 AM
Past Due	High	SGron	8/20/2025, 9:31 AM
Past Due	High	SGron	8/14/2025, 3:35 PM

3) All your Open Tasks will display

CX Connect

Search...
 Shannon 126159..

[Home](#)
[Knowledge Hub](#)
[Cases](#)
[Tasks](#)

Tasks
My Open Tasks

50+ items • Sorted by Priority • Filtered by My tasks - Status • Updated a few seconds ago
 Search this list...

	Subject	Related...	Due Date/Time	Status	Pri...	Assl...	Create Date	Last Modified Date...
1	Vehicle Status - Action Required		8/23/2025, 8:00 PM	New	High	SGrön	8/22/2025, 10:24 AM	8/22/2025, 10:24 AM
2	Involved Dealer Action Required		8/23/2025, 8:00 PM	New	High	SGrön	8/22/2025, 10:16 AM	8/22/2025, 10:16 AM
3	Involved Dealer Action Required		8/23/2025, 8:00 PM	New	High	SGrön	8/22/2025, 8:49 AM	8/22/2025, 8:49 AM
4	Involved Dealer Action Required		8/23/2025, 8:00 PM	New	High	SGrön	8/22/2025, 9:32 AM	8/22/2025, 9:32 AM
5	(BRC) Vehicle Concern - Action Required		8/21/2025, 8:00 PM	Past Due	High	SGrön	8/20/2025, 5:31 PM	8/22/2025, 12:01 AM
6	(BRC) Vehicle Concern - Action Required		8/21/2025, 8:00 PM	Past Due	High	SGrön	8/20/2025, 9:32 AM	8/22/2025, 12:01 AM
7	Case Update - General		8/21/2025, 8:00 PM	Past Due	High	SGrön	8/20/2025, 8:48 AM	8/22/2025, 12:01 AM

- 4) Click directly into the Subject of the Task to view more information. Review:
- Comments:** provides you specific direction on what Template within Collaboration to use
 - Due Date:** when the response is due
 - Status:** indicates if the Task is current or Past Due
 - Related To:** the case the Task is in reference to

Task
Vehicle Status - Action Required
Mark Complete

Assigned To: Status: **New** Due Date: 8/23/2025

[Detail](#)
[Related](#)

Task Information

Assigned To:

Due Date/Time: 8/23/2025, 8:00 PM

Comments: 1
This is a notification to inform you a mutual customer has reached out to Customer Assistance. Please review our comments and complete the Template: Dealer - Vehicle Status to provide us with as much information you can about this situation.

Subject: **Vehicle Status - Action Required**

Due Date: 8/23/2025

Status: **New**

Contact Type: **Customer**

Public: ☐

Additional Information

Completed Date/Time:

Name:

Priority: **High**

Related To:

5) Click 'Mark Complete' in the Task, as you are going to action it next

Task

Vehicle Status - Action Required

✓ Mark Complete

Assigned To

Status

Due Date

New

8/23/2025

Detail

Related

Task Information

Assigned To

Status

Due Date/Time

Contact Type

Comments

Public

Subject

Due Date

New

8/23/2025, 8:00 PM

Customer

This is a notification to inform you a mutual customer has reached out to Customer Assistance. Please review our comments and complete the Template: Dealer - Vehicle Status to provide us with as much information you can about this situation.

☐

Vehicle Status - Action Required

8/23/2025

6) Click directly into the Case number in the Related To to open the case information. Review Details as needed and click on Additional Information

Case

Case Owner LOB

Status

Pending with Dealer

Subject

Vehicle Concern - Request Other Goodwill or Compensation

✓

Pending

Closed



Vehicle Description

VIN

2025 Chevrolet Blazer

Component/Symptoms

Component

Symptom

HVAC

Broken

<

1

>

Details

Feed

Related

Additional Information

Case Information

Case Number

Status

Pending

Help

The 'Related' tab is where you will upload any files, and review or add case comments from you to your GM Advisor.

New Process: Case Collaboration

- 7) Click into the most-recent Collaboration to review the information the Advisor provided on the customer

Details

Feed

Related

Additional Information

 **Advisor Information**

Click on the Case Update you wish to view

 **Collaboration**

New

Template Type	Status	Last Modified By	Submitted By
Vehicle Concern - Action Required	Complete		

- 8) To respond to the Advisor, click New in Collaboration

Details

Feed

Related

Additional Information

 **Advisor Information**

Click on the Case Update you wish to view

 **Collaboration**

New

Template Type	Status	Last Modified By	Submitted By
Vehicle Concern - Action Required	Complete		

- 9) Select the Template that was mentioned in the Comments of the Task and click 'Next'

ent Symptom X

New Dealer Response

Select a response type:

- ☐ Dealer - Case Update
- ☐ Dealer - Part Delay Status
- ☐ Dealer - Product Allegation
- ☒ Dealer - Vehicle Status
- ☐ Dealer - Vehicle Status Repurchase Consideration

Cancel Next

Assessments are completed by you or your own advisor. This section contains additional relevant case details.

10) Fill out the details and click 'Submit'

X

Has the vehicle been diagnosed?

Yes

What is the diagnosis/repair recommendation?

WE JUST FINISHED THE HVAC REPAIR THIS MORNING

Are you (dealership) offering any cost assistance or goodwill to the customer?

No

If yes, what is being offered?

If no, what is the reason for no assistance offered?

NOTHING BEING OFFERED, REPAIR COVERED UNDER WARRANTY

Has the customer been provided alternate transportation?

No

Repair Order Document requested?

No

Provide additional Details

FEEL FREE TO GIVE WHATEVER GOODWILL YOU FIND APPROPRIATE

Cancel Save for Later Submit

11) 'Confirm' you want to send the response

Has the vehicle been diagnosed?

Yes

What is the diagnosis/repair recommendation?

WE JUST FINISHED THE HVAC REPAIR THIS MORNING

Are you (dealership) offering any cost assistance or goodwill to the customer?

No

If yes, what is being offered?

If no, what is the reason for not offering?

NOTHING BEING OFFERED

Has the customer been provided with a repair order?

No

Repair Order Document ready for review?

No

Provide additional Details

FEEL FREE TO GIVE WHATEVER GOODWILL YOU FIND APPROPRIATE

New Dealer Response

 **Dealer - Vehicle Status Response**

You are about to submit this response. Submitted responses cannot be edited further. Do you want to continue with submission?

[Back](#) [Confirm](#)

[Cancel](#) [Save for Later](#) [Submit](#)

- 12) You'll receive a success message that your reply was saved to the case and can now view your Collaboration back to the Advisor in the Collaboration section

