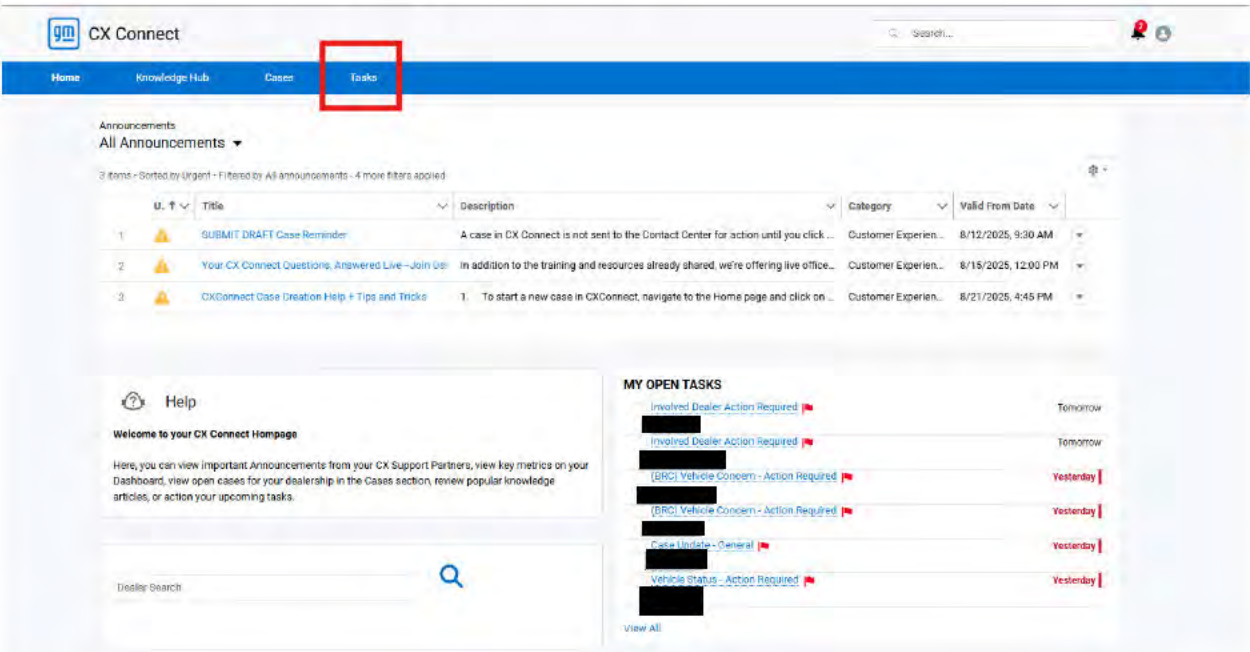
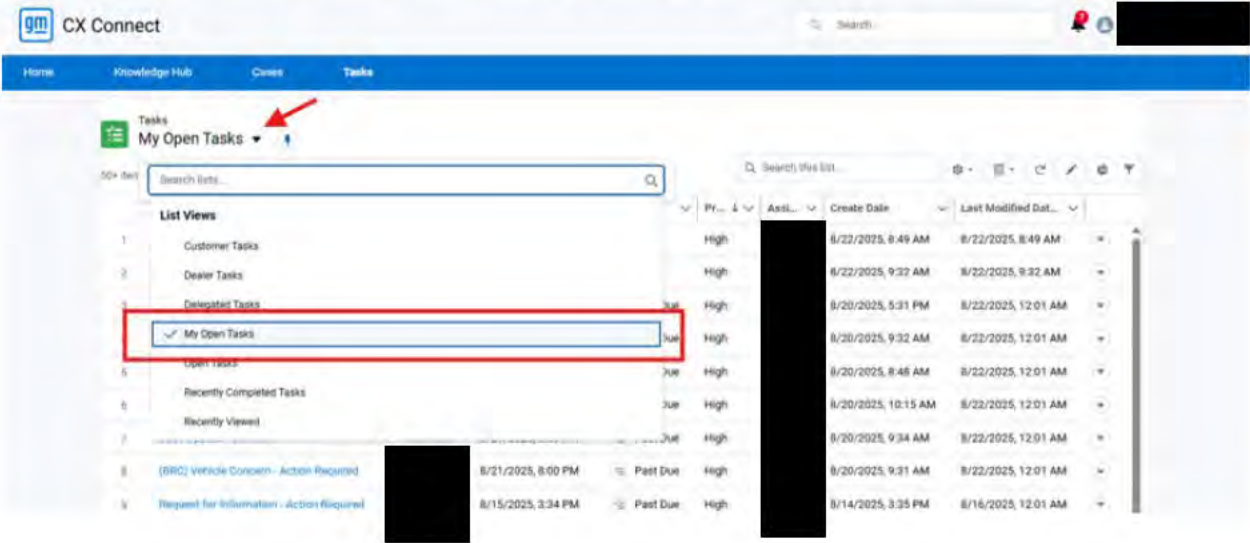


CX Connect CRM User: How to Locate and Action a Task

1) Select Tasks from the Home page



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



3) All your Open Tasks will display

gm CX Connect

Home Knowledge Hub Cases Tasks

Tasks My Open Tasks

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

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		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		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		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		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		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		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		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: [Redacted] Status: New Due Date: 8/23/2025

Detail Related

Task Information

Assigned To: Shannon Oronevelt

Status: New

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

Contact Type: Customer

Public:

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

Additional Information

Completed Date/Time: [Redacted]

Name: [Redacted]

Priority: High

Related To: [Redacted]

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

Task
Vehicle Status - Action Required

Assigned To [Redacted] Status New Due Date 8/23/2025

Detail Related

Task Information

Assigned To [Redacted] Status New

Due Date/Time 8/23/2025, 8:00 PM Contact Type Customer

Comments **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.** Public

Subject
Vehicle Status - Action Required

Due Date
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 Owner LDB [Redacted] Status Pending Pending with Dealer Subject Vehicle Concern - Request Other Goodwill or Compensation

Progress: [Green bar] Pending [Blue bar] Closed

Vehicle Description
2025 Chevrolet Blazer VIN [Redacted]

Component/Symptoms

Component	Symptom
HVAC	Broken

Details Feed Related **Additional Information**


Case Information


Case Number [Redacted] 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	[REDACTED]	[REDACTED]

- 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	[REDACTED]	[REDACTED]

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

Symptom

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

10) Fill out the details and click 'Submit'

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?

Has the customer been provided with a repair order?
No

Repair Order Document reference number

No

Provide additional Details
FEEL FREE TO GIVE WHATEVER GOODWILL YOU FIND APPROPRIATE

Cancel Save for Later Submit

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

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

