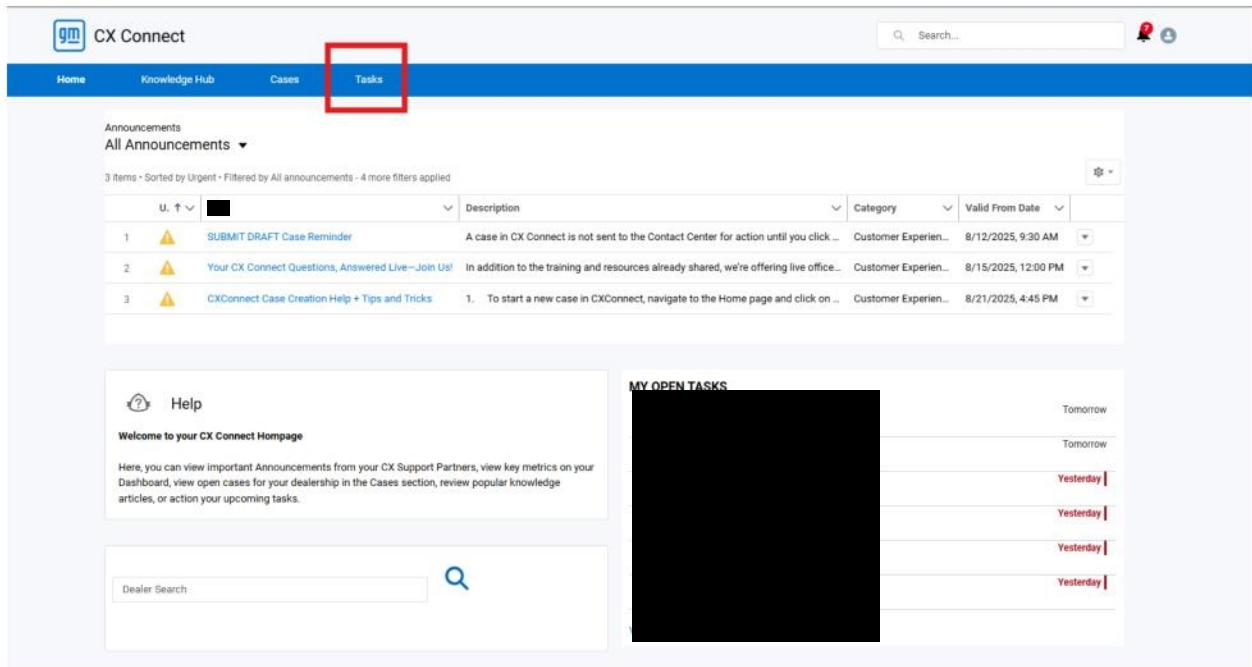


CX Connect CRM User: How to Locate and Action a Task

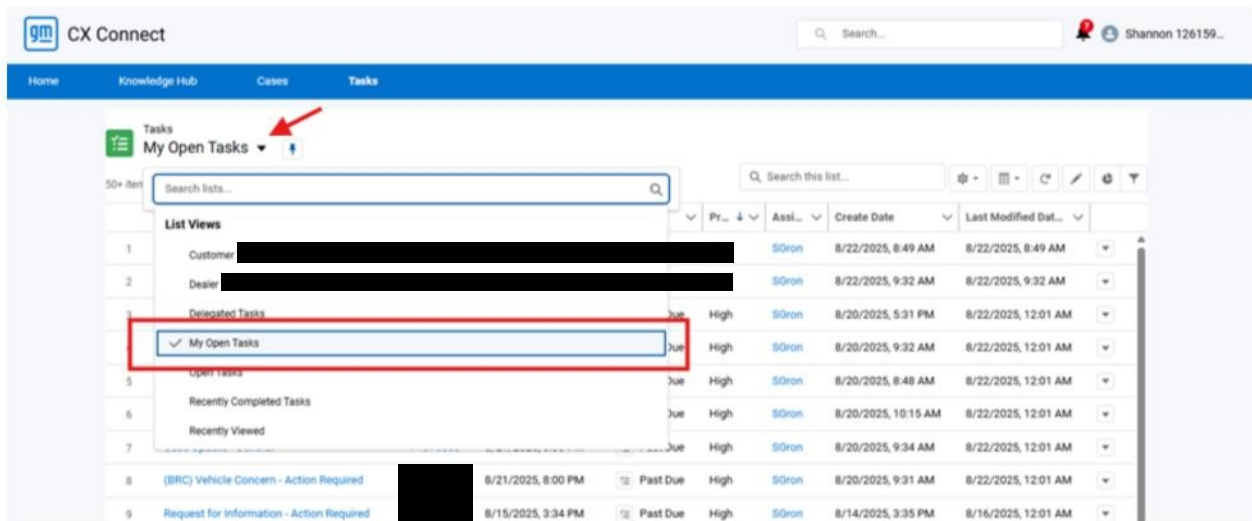
1) Select Tasks from the Home page



The screenshot shows the CX Connect Home page. The navigation bar at the top includes 'Home', 'Knowledge Hub', 'Cases', and 'Tasks'. The 'Tasks' tab is highlighted with a red box. Below the navigation bar, there is a section for 'Announcements' with a dropdown menu set to 'All Announcements'. Below this, there is a table of announcements. To the right of the announcements, there is a section for 'MY OPEN TASKS' which is currently redacted with a black box.

U. ↑ ↓	Description	Category	Valid From Date
1	SUBMIT DRAFT Case Reminder	Customer Experien...	8/12/2025, 9:30 AM
2	Your CX Connect Questions, Answered Live—Join Us!	Customer Experien...	8/15/2025, 12:00 PM
3	CXConnect Case Creation Help + Tips and Tricks	Customer Experien...	8/21/2025, 4:45 PM

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 navigation bar. A dropdown menu is open, showing the 'My Open Tasks' list view selected. Below the dropdown, there is a table of tasks. The first two rows are redacted with black boxes. The third row is 'Delegated Tasks'. The fourth row is 'My Open Tasks' (highlighted with a red box). The fifth row is 'Open tasks'. The sixth row is 'Recently Completed Tasks'. The seventh row is 'Recently Viewed'. Below the dropdown, there is a table of tasks.

Pr...	Assi...	Create Date	Last Modified Dat...
8/22/2025, 8:49 AM	8/22/2025, 8:49 AM		
8/22/2025, 9:32 AM	8/22/2025, 9:32 AM		
8/20/2025, 5:31 PM	8/22/2025, 12:01 AM		
8/20/2025, 9:32 AM	8/22/2025, 12:01 AM		
8/20/2025, 8:48 AM	8/22/2025, 12:01 AM		
8/20/2025, 10:15 AM	8/22/2025, 12:01 AM		
8/20/2025, 9:34 AM	8/22/2025, 12:01 AM		
8/21/2025, 8:00 PM	8/20/2025, 9:31 AM	8/22/2025, 12:01 AM	
8/15/2025, 3:34 PM	8/14/2025, 3:35 PM	8/16/2025, 12:01 AM	

3) All your Open Tasks will display

CX Connect

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

Tasks

My Open Tasks

Sorted by Priority • Filtered by My tasks • Status • Updated a few seconds ago

	Subject	Related...	Due Date/Time	Status	Pri...	Assi...	Create Date	Last Modified Date...
1	Vehicle Status - Action Required		8/23/2025, 8:00 PM	New	High	SGron	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	SGron	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	SGron	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	SGron	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	SGron	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	SGron	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	SGron	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

Status
New

Due Date
8/23/2025

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

Task Information

Assigned To

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

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.

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

✓ Complete

Status
New

Due Date
8/23

Detail

Related

▼ Task Information

Assigned To

Due Date/Time
8/23 8:00 PM

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.

Subject
Vehicle Status - Action Required

Due Date
8/23

Status
New

Contact Type
Customer

Public
☐

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

Pending with
Dealer

Subject
Vehicle Concern - Request Other Goodwill or Compensation

✓

Pending

Closed

Vehicle Description
2025 Chevrolet Blazer

VIN

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

DetailsFeedRelatedAdditional 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		2025-08-22T14

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

DetailsFeedRelatedAdditional 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		2025-08-22T14

- 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

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 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

