A1511 - New Specific RFI

Overview

For specific request, a dedicated form was created : the RFI specific part. In this form, you can add Excel templates and make it available for your supplier. Each purchasing segment can have its own template.

Table of content

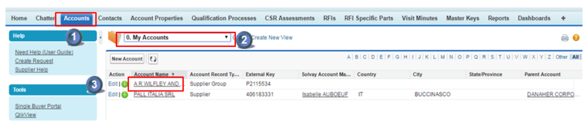
Step-By-Step

STEP 1

1- In Tabs => Click on "**Accounts**"

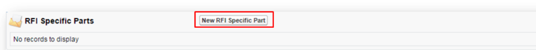
2- In View Menus => Select "**My Accounts**"

3- In ListViews => Click on **"Account Name**" eg.A R WILFLEY AND SONS



STEP 2

Scroll down to find the related list "**RFI Specific Parts**" and click on the button " **New RFI Specific Part**"



STEP 3

1- **Account** is automatically filled in this square eg.A R WILFLEY AND SONS

2- Click on the magnifier next to the field "**Contact**", to search your supplier contact name
Enter the **contact name**; find it on the list and click on it.

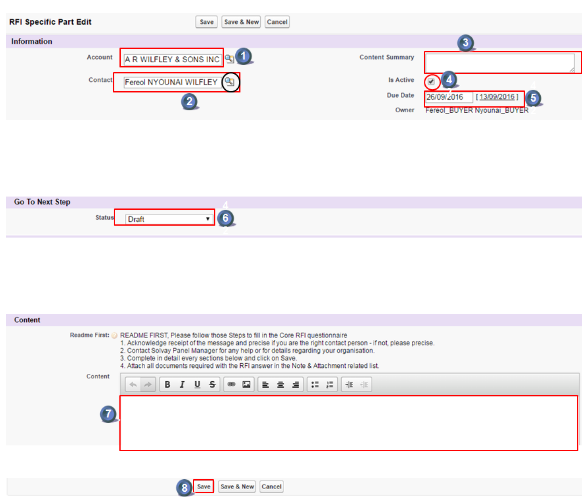
3- **Content Summary** is automatically filled according the comments uploaded in content

4- Verify that the RFI has the status "**is Active**".

5- Click on the "**Due Date**" field to change the maximum date you want the supplier to return the RFI.

6 - Leave the status "**Draft** (We first need to attach the Excel template to this Specific RFI before sending it"

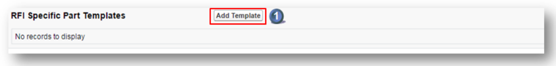
7- Scroll down and add the **content** of the request: explain to the supplier what you need



8- Scroll down at the bottom of the page and click on the button "**Save**".

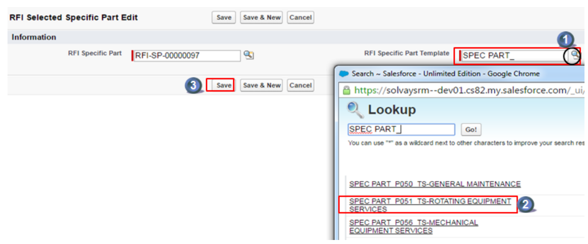
STEP 4

1-Scroll down to find the related list "RFI Selected Specific Part Templates" and click on the button "Add Templates"



How attach templates to my Specific RFI

STEP 5



1- Fill part of the **name** and Click on the magnifier next to the field "RFI Selected Specific Part Template".

If no template appears, click on the "+" in the tab menu. Then choose "RFI Specific Part Templates" : you will get the full list

2- Click on the **name** of the template you need

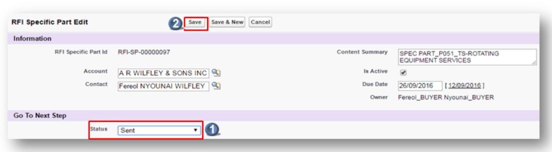
3- Click on the button "**Save**".

> Please note that if you don't find your RFI Specific Part template, you can :
>
> - Attach your existing Excel file in Core RFI or the specific part
> - or ask to load your template in Convergence through a request / Freshdesk ticket

Send my Specific RFI

STEP 6

Scroll to the "Go To Next Step" section and double-click in the pen next to the field "**Status**".



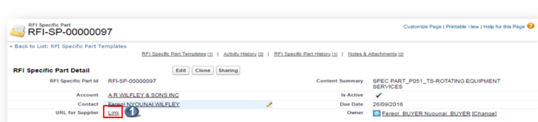
1- Click on the dropdown menu and select "**Sent**“

2- Click in the button "**Save“**

Help my supplier (I connect with the link)

STEP 7

Come back to your Specific RFI page in read mode.

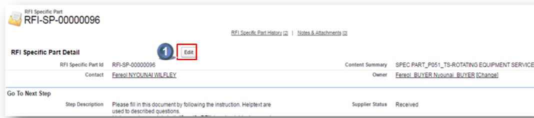


1- Under the RFI detail, click on the "**Link** " in the "URL for Supplier" type.
Make sure you are not a robot by clicking on "I am not a robot“

The supplier have the same access to this page. He can update the informations and you can see the results directly in Convergence.
As a supplier, download the **Excel template**, fill in it and then attach it back to the Specific RFI.

Receive the answer from the supplier

STEP 8



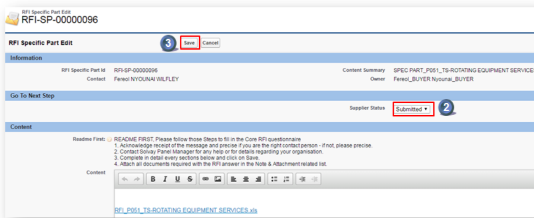
Supplier View

As a supplier:

1- Click on **Edit** the specific RFI page and choose

2 -the status "**Submitted**".

3- Click on "**Save**"

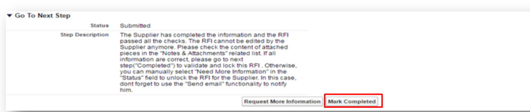


As a buyer, you are warned by email that the supplier submitted his specific RFI

Click on the **link in the email**

STEP 9

Go back to the top of the form and click on the button "**Mark Completed"**



Related articles

- A1510 - New RFI

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.