

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.

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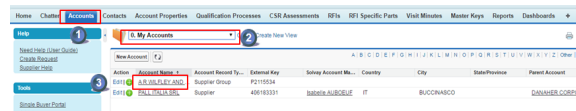
Step-By-Step

STEP 1

1- In Tabs => Click on "Accounts"

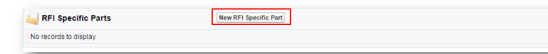
2- In View Menu => Select "My Accounts"

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.

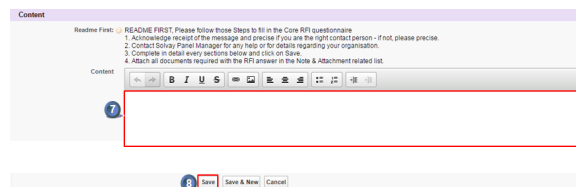
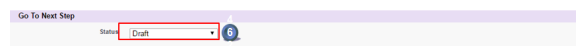
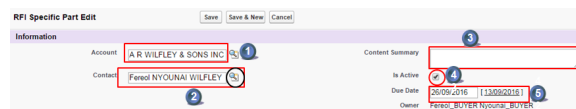
3- **Content Summary** is automatically filled according the comments uploaded in content

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"

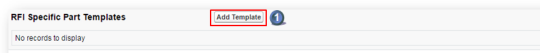
7- Scroll down and add the **content** of the request: explain to the supplier what you need



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

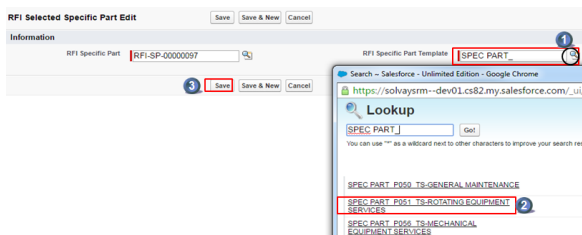
STEP 5

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

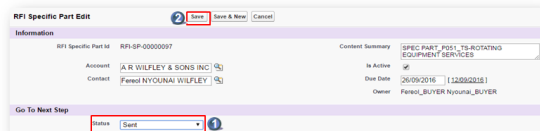
Send my Specific RFI

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"

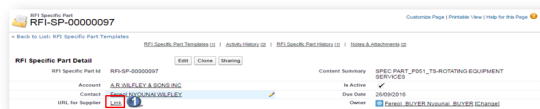


Help my supplier (I connect with the link)

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](#)