

A1510 - New RFI

Overview

RFIs are web forms : your suppliers will fill in them directly in Convergence.

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Step-By-Step

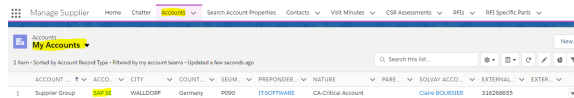
STEP 1

To Create a **"New RFI"**

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

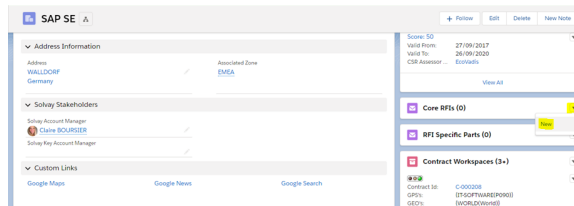
2- In View Menus => Select **"My Accounts"**

3- In ListViews => Click on **"Account Name"** eg. SAP SE



STEP 2

Go to the **"Core RFIs"** related list on the right of your screen and click on the button **"New"**



STEP 3

Account is automatically filled in this square eg. SAP SE

1- Fill **Contact**



You must have a contact related to your account to send a RFI ([A1311 - Account Contacts and related contacts](#))

STEP 4

Go To Next Step

In status, select **Sent** in View menus

STEP 5

New RFI

Information

RFI Id: _____ Due Date: 25/09/2018

Account: SAP SE

Is Active: ☒

Contact: Claire BOYER

Owner: Yoann Petit-ext

Go To Next Step

Status: Sent

1- Fill the **Due Date**

2- Click on **Save**



You can attached an Excel file in the Core RFI to receive answer from suppliers on specific RFI.

Related articles

- [A1511 - New Specific 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.