A1510 - New RFI

Overview

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

Table of content

Step-By-Step

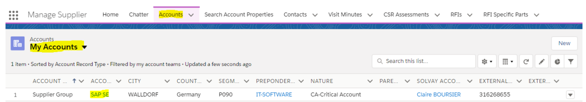
STEP 1

To Create a "**New RFI**"

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

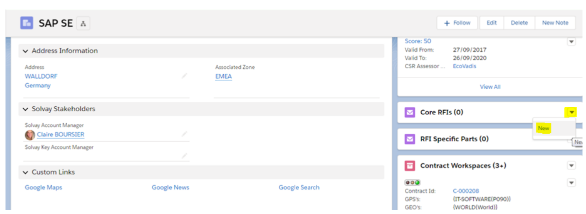
2- In View Menus => Select "**My Accounts**"

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



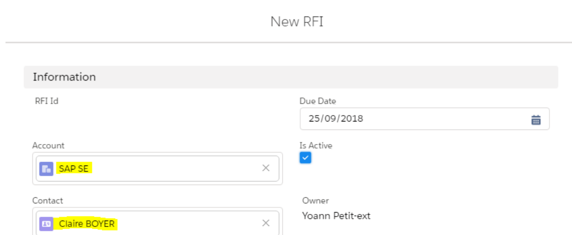
STEP 2

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**

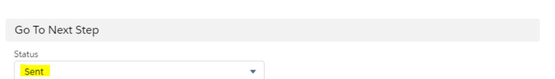


> ⚠ You must have a contact related to your account to send a RFI (A1311 - Account Contacts and related contacts)

STEP 4

Go To Next Step

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

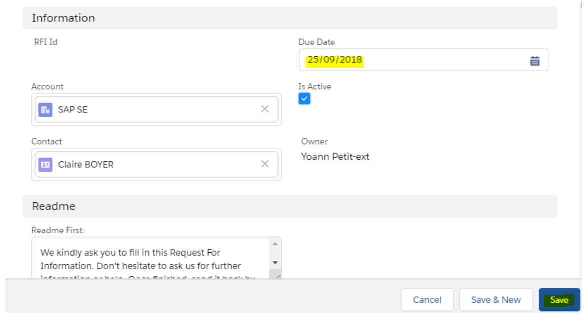


STEP 5

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.