

All About RFQs: Closing, Duplicating, Adding Notes, Searching Archived RFQs

Closing an RFQ

Once an RFQ is submitted the submitting salesperson should receive a notification of the submission along with the associated department manager for jobs or inside salesperson for orders. If no email notification is received, you can verify that the RFQ was submitted successfully via the “Open RFQs” report on the CRM dashboard or with the Open RFQs report on the report page.

ZN	DEPT	ACCOUNT	SALES	INSIDE	BY	ASGD	DATE	DAYS OUT	TYPE	DESC	ACTION
1A M	HR	American Marsh Contact: Ken Burton 185 Progress, Collierville, TN 38017 View View Activity Log RFQ Activity	SSS	JP2	SSS		03/16/2022	0	Job RFQ Submitted	Please Quote To Remove Old Cantilever Jib And Install A New 1 Ton Cantilever Jib With 12' Span   	CLOSE
1C M	MR	BELLAHNE ATLANTIC GROUP LLC Contact: Tim Busby 233 CHRIS LANE, BRANDON, MS 39047 View View Activity Log RFQ Activity	BCZ	UNA	BCZ		03/14/2022	1	Job RFQ Submitted	Please Update Quote On Quarterly Vibration And In Need To Schedule Q1 Asap 	CLOSE
1A M	HR	Steel Warehouse Company, Inc. Contact: David Walden 4740 Hungerford Rd., Memphis, TN 38118 View View Activity Log RFQ Activity	SSS	JP2	SSS		03/14/2022	2	Job RFQ Submitted	Rebid Quote 20946 As The Original Winner Of The Bid Did Not Quote Drives. Their Bid Was At \$85k Minus The Drives So We Will Still Be High. If We Can Close The Gap David Will Strongly Consider Our Bid At This Point   	CLOSE
1C M	MR	Carlisle SynTec, Inc. Contact: Brad Broess 1201 Scott Street, Senatobia, MS 38668 View View Activity Log RFQ Activity	DLTA	JP2	BCZ		03/11/2022	5	Job RFQ Submitted	Tuesday 3/29 They Are Taking Extruder Line Down To Change Dies. One Of Their Extruder Motors Is Currently Running More Voltage Than Another Identical. The Encoder Speed Is Also Running Higher Than Other. 400hp Extruder Motor. Want To Run Offline Prima Test On Motor 3/29 While It Is Offline And We Are Able To Hook Up To. Please Provide Quote To Perform Site Visit 	CLOSE

Within the description field of this report you can see a few icons to perform various actions.

1. Eye icon to view the RFQ detail page.



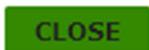
2. The tag icon to quickly add brief notes to the RFQ.



3. The Person to Person arrow to assign an RFQ (HR & CS Departments Only)



When the RFQ is received, ideally the internal Hi-Speed employee who received the notification will close the RFQ by clicking the “Close” button.



This close button will take you to a “RFQ Detail” page where you can see almost a duplicate of what the email notification provided. Along with the following:

- Link to attachments

Attached Files

<http://test.portal.gohispeed.com/acs-quotes/files/Pinnacle-1646330443-641.pdf>

- Link to view page with all visible attachments

[View All Attachments](#)

JACKSON MADISON COUNTY - ATTACHMENTS

Cust#:	005607-1
Sales MTD:	0.00
Sales PY:	4,885.85
Sales YTD:	0.00
Sales PYTD:	0.00
Percentage:	0.0%

Files



- Activity associated with this RFQ

IR	Dept	Account	YTD m/m%	21 +/- %	Sales	Inside	By	Quote#	Date	Type	Description	Amount
2A	CS	Pinnacle Structures, Inc. 2665 Hwy 321 Bypass, Cabot, AR 72023 View View Activity Log RFQ Activity		0.0%	-77.8%	TWP	TMT	SES	03/04/2022	Assigned	Assigned To Sean Sullivan	0.00
2A	CS	Pinnacle Structures, Inc. 2665 Hwy 321 Bypass, Cabot, AR 72023 View View Activity Log RFQ Activity		0.0%	-77.8%	TWP	TMT	TWP	03/03/2022	Job RFQ Submitted	Crane Estimate Submitted 275 Ft Runway Supported On Building Columns With Building Beams, @ 23ft Support Centers, 15 Ton Capacity 2@15 Ton Bridges Comparing To Mine 33'x6' High Anti-Collision And Radio Remotes	0.00

- A button to log activity on this RFQ

LOG RFQ ACTIVITY

- A button to duplicate this RFQ

COPY RFQ W/ ATTACHMENTS

COPY RFQ NO ATTACHMENTS

- Form to close the RFQ and associate with an ACS number from a quote or an order.

<p>Enter ACS Quote/Order Number: If N/A, leave blank and provide reason in next box</p> <input type="text"/>	<p>If N/A, provide reason: Reason will be emailed to salesperson.</p> <input type="text"/>
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SUBMIT

Adding Additional File Uploads to RFQs

You can add additional files using the “Log RFQ Activity” option and as of March 2022 there is the ability to upload files to all activity. If unsure of what activity to add just use the “Note” activity to assign to the RFQ. This activity will then show in normal activity and on the RFQ detail page.

Customer/Prospect Name*
American Marsh

ACS Quote/Order Number/RFQs
RFQ 3755 (Please quote to remove old cantilever jib and inst) 03/16/2022

Activity Type
Note

Contact Information
Select Contact
Ken Burton - kenneth.burton@vita.com : 9015066648

Primary Department
Holst Repair

Other Departments
 C2
 HR
 MR
 CS

Date of Activity
2022-03-16

Opportunity Amount
0

Notes/Results


Drop files here
Allowed file types are gif, jpg, png, avi, mp3, wav, mp4, mov

Searching for Archived RFQs

The “Activity” menu option can provide almost all available information created within the CRM. Short cuts to specific activity are placed within the “All Descriptions” dropdown box.

DASHBOARD ACCOUNTS LEADS ACTIVITY QUOTES NEW PROSPECT RESOURCE LIBRARY REPORTS ADMIN LOG OUT

ACTIVITY

Filter Options

Branch Zone All Users Department All Descriptions Account Name 1000 Order by DESC Select Date Range

BR	DEPT	ACCOUNT	SALES	INSIDE	BY	QUOTE#	DATE
1B	HR	MOST, INC. 355 James Lawrence Rd., Jackson, TN 38301 View View Activity Log Quote Activity	0%	JRU	JP2	JAC	147128 Job Estima
1A	IS	KJS MP Joint Venture, LLC 4844 Poplar St. Bldg 242, Millington, TN 38104 View View Activity Log Quote Activity	0%	GWY	UNA	JP2	0096543 Dist Quote
1A	IS	Memphis Chain & Cable, LLC 581 Pear Avenue, Memphis, TN 38107 View View Activity Log Quote Activity	-99.9%	GWY	JP2	JP2	0096542 Dist Quote
1A	HR	American Yeast Corp. 2405 North Second Street, Memphis, TN 38127	-99.9%	GWY	SLC	JDJ	0211325 Job Quote

Today
 Yesterday
 Last 7 Days
 This Week
 Next Week
 Last Week
 Last Month
 This Month
 Last Year
 This Year

March 2022							April 2022							May 2022										
Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa	Su	Mo	Tu	We	Th	Fr	Sa				
			1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19			
20	21	22	23	24	25	26	27	28	29	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13
14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31							

The results of the “Submitted RFQs” will display both Job and Order RFQs whether currently open or closed, with similar actions to add notes, view detail as well as a couple more icons:

- Directly access the attachment page for this quote represented by a gallery icon



- View the attachments in a small popup box with the paper clip icon.



ACTIVITY

Filter Options =>

LOG ACTIVITY

Branch Zone All Users Department --Submitted RFQs Account Name 1000 Order by DESC Jan 1, 2022 - Dec 31, 2022

RUN DOWNLOAD

Saturday, January 1st, 2022 - Saturday, December 31st, 2022

BR	DEPT	ACCOUNT	YTD M/M%	24+M%	SALES	INSIDE	BY	QUOTER	DATE	TYPE	DESCRIPTION	AMOUNT
1A	M	American Marsh Contact: Ken Burton 185 Progress, Collierville, TN 38017 View View Activity Log RFQ Activity	0.0%	0.0%	SSS	JP2	SSS		03/16/2022	Job RFQ Submitted	Please Quote To Remove Old Cantilever Jib And Install A New 1 Ton Cantilever Jib With 12 Span  	0.00
1C	M	RELIANT ATLANTIC GROUP LLC Contact: Tim Busby 233 CHRIS LANE BRANDON, MS 39047 View View Activity Log RFQ Activity	0.0%	50.0%	BCZ	UNA	BCZ		03/14/2022	Job RFQ Submitted	Please Update Quote On Quarterly Vibration And It Need To Schedule Q1 ASAP  	0.00
1A	M	Steel Warehouse Company, Inc. Contact: David Walden 4740 Hungerford Rd., Memphis, TN 38118 View View Activity Log RFQ Activity	0.0%	-99.9%	SSS	JP2	SSS		03/14/2022	Job RFQ Submitted	Rebid Quote 20946 As The Original Winner Of The Bid Did Not Quote Drives. Their Bid Was At 250k Minus The Drives So We Will Still Be High. If We Can Close The Gap David Will Strongly Consider Our Bid At This Point  	0.00
1C	M	Cardale Syntec Inc. Contact: Brad Bloss 1201 Scott Street, Senatobia, MS 38668 View View Activity Log RFQ Activity	209.8%	18.4%	DLTA	JP2	BCZ		03/11/2022	Job RFQ Submitted	Tuesday 3/29 They Are Taking Extruder Line Down To Change Dies. One Of Their Extruder Motors Is Currently Running More Voltage Than Another Identical. The Encoder Speed Is Also Running Higher Than Other. 400hp Extruder Motor. Want To Run Offline Plasma Test On Motor 3/29 While It Is Offline And We Are Able To Hook Up To. Please Provide Quote To Perform Site Visit  	0.00
2A	L	CONWAY COUNTY REGIONAL WATER Contact: Robert Gunderman 30 H2O DR., PLUMERVILLE, AR 72127 View View Activity Log RFQ Activity	0.0%	201.7%	TWP	TMT	TWP		03/11/2022	Job RFQ Submitted	They Are Adding An Additional Pump To The System. They Would Like A Quote On A 400 Hp 480 Volt 60 Hz Motor.  	0.00
1C	M	REED'S METALS Contact: James Godwin 24350 CO RD., FLORENCE, AL 36633 View View Activity Log Quote Activity	1000.0%	0.0%	JRU	UNA	JRU	96476	03/10/2022	Order RFQ Submitted	Can You Please Quote Me The Following. Please Send The Quote To Me. Harrington 1 Ton Hoist 115v 158 Of LIFT Hook On Top They Are Currently Buying Dayton Hoist For 3300 But Believe They Get Free Shipping Just Fyi.....  	0.00
1A	M	Process & Power Contact: Justin Collier 1721 Corporate Avenue, Memphis, TN 38132 View View Activity Log Quote Activity	-95.9%	210.6%	GWY	SLC	GWY	021282	03/09/2022	Job RFQ Submitted	Justin Is Looking For An Estimate To Recondition (Clean, Dip/Bake, Bearings) On A 450v 400hp Compressor Motor. He Doesn't Have Any Other Info On It Because I Asked.  	0.00