# 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.

						DASHBOAF	RD ACCOUNTS	LEADS ACT	VITY QUOTES NEW PRO	SPECT RESOURCE LIBRARY REPORTS ADMIN	LOG OUT Q			
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DAS	НВОА	RD				- <b>1</b>								
						IN-STO	CK INV. LOG ACTIV	/ITY NEW PI	ROSPECT NEW ACTIVITY TICK	KER CRANE RFQ HISTORY LOG MR ROUTE/PICKU	P ENTER FORECAST			
O All	Open RF	Os												
Sunday	Al Cycle Intrys Mindly January 1st, 2017 - Wednesday, March 16th, 2022													
ZN 🔹	DEPT 0	ACCOUNT	SALES	INSIDE	BY	ASGD 4	DATE	DAYS OUT	• ТҮРЕ	DESC	ACTION			
1A M	HR	American Marsh Contact: <u>Ken Burton</u> <u>185 Progress , Collierville , TN 38017</u> <u>View   View Activity   Log REQ Activity</u>	SSS	JP2	SSS		03/16/2022	0	Job RFQ Submitted	Please Quote To Remove Old Cantilever Jib And Instal A New 1 Ton Cantilever Jib With 12' Span Image: Space S	CLOSE			
1C M	MR	RELIANE ATLANTIC GROUP LLC Contact: <u>Tim Busby</u> 233 CHRIS LANE BRANDON MS 39047 View   View Activity   Log REQ Activity	BCZ	UNA	BCZ		03/14/2022	1	Job RFQ Submitted	Please Update Quote On Quarterly Vibration And Ir, Need To Schedule Q1 Asap	CLOSE			
1A M	HR	<u>Steel Warehouse Company, Inc.</u> Contact: <u>David Walden</u> 4740 Hungerford Rd., <u>Memphis</u> , <u>TN 38118</u> <u>View</u>   <u>View</u> Activity   Log RFQ Activity	SSS	JP2	SSS		03/14/2022	2	Job RFQ Submitted	Rebid Quote 20946 As The Original Winner Of The Bit Did Hot Quote Drives. Their Bid Was At \$85k Minus T Drives So We Will Stull Be High. If We Can Close The Gap David Will Strongly Consider Our Bid At This Poin On the State Sta	t CLOSE			
1C M	MR	<u>Carlisle SynTec Inc.</u> Contact: <u>Brad Bross</u> 1201 Scott Street. <u>Sanatobia</u> . <u>MS 38668</u> View   View Activity   Log REQ Activity	DLTA	JP2	BCZ		03/11/2022	5	Job RFQ Submitted	Tuesday 3/28 Two Are Taking Borused Line Down To Change Dies, One Of Their Extruder Moorne Is Guree Running More Voltage Than Another Identical. The Encoder Speed Is Alios Running Higher Than Other 400hp Extruder Motor. Ward To Run Offline Plana Test Orok Us To. Please Provide Quote To Perform Site Via WOO To	dy 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.

#### CLOSE

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
JA	ACKSON MADISON COUNTY - ATTACHMENTS

Sales MTD:         0.00           Sales MTD:         4.865.55           Sales YTD:         0.00           Percentage:         0.04	Cust#:	005607-1
Sales PY:         4.005.05           Sales YTD:         0.00           Sales PYTD:         0.00           Percentage:         0.0%	Sales MTD:	0.00
Sales YTD: 0.00 Sales PYTD: 0.00 Percentage: 0.04 Files	Sales PY:	4,885.85
Sales PYTD: 0.00 Percentage: 0.0% Files	Sales YTD:	0.00
Percentage: 0.0%	Sales PYTD:	0.00
Files	Percentage:	0.0%

• Activity associated with this RFQ

URL Dept         Account         YTD m/m%         21e /-%         Sales         Inside         By         Quote #         Date         Fype         Description         Amount           24         C5         Finade Structures, fin.         265         Finade Structures, fin.         265         0.01/04/2022         Assigned         Assigned         0.0           265         Finade Structures, fin.         266         -77.am         TWP         TMT         SES         0.0/03/2022         Assigned         Assigned         0.0           265         Finade Structures, fin.         266         -77.am         TWP         TMT         TWP         O/03/03/2022         Job RFQ Submitted         Crare Estimate Submitted275 F Survey Supported On Building Channes To Building Ch		© Recent Activity											
2A     CS     Pinnack Structures, Inc.     Soles     -77.8% TWP     THT     SES     0.00 //04/2022     Assigned     Assigned To Same Sullivan     0.00       2A     CS     Pinnack Structures, Inc.     Soles     -77.8% TWP     THT     SES     0.01/04/2022     Assigned     Assigned To Same Sullivan     0.00       2A     CS     Pinnack Structures, Inc.     Soles     -77.8% TWP     THT     TWP     0.01/04/2022     Assigned     Assigned To Same Sullivan     0.00       2A     CS     Pinnack Structures, Inc.     Soles     -77.8% TWP     THT     TWP     0.01/03/2022     Job RFQ Submitted     Ones Estimates Submitsed To Same Sullivan     0.00       2A     CS     Pinnack Structures, Inc.     Soles     -77.8% TWP     THT     TWP     0.01/03/2022     Job RFQ Submitted     Ones Estimates Submitsed To Same Sullivan     One       2A     CS     Pinnack Structures, Inc.     Soles     Coles     Final Sullivan     One     One     Soles     Final Sullivan     One       2A     CS     Pinnack Structures, Inc.     THT     TWP     THT     TWP     One     One     Final Sullivan     One       View / View Activity Ligg RFD Activity     View / View Activity Ligg RFD Activity     THT     TWP     THT     TWP <th>в</th> <th>🛛 Dept 🔹</th> <th>Account</th> <th>YTD m/m%</th> <th>21+/-%</th> <th>Sales</th> <th>Inside</th> <th>• By</th> <th>Quote#</th> <th>Date</th> <th>Type</th> <th>Description</th> <th>Amount •</th>	в	🛛 Dept 🔹	Account	YTD m/m%	21+/-%	Sales	Inside	• By	Quote#	Date	Type	Description	Amount •
2A     C5     Pinnacle Structures, Inc.     0.04     Estimate Submitted     0.04       265     Hwy 321 Bypass, Cabol, AR 72023     Vew I/Vew Activity Log RFQ Advity     100 Arg 52 bypass     0.04       Vew I/Vew Activity Log RFQ Advity     Vew I/Vew Activity Log RFQ Advity     100 Arg 52 bypass     0.04	2 <i>1</i> L	cs	Pinnacle Structures, Inc. 2665 Hwy 321 Bypass , Cabot , AR 72023 View   View Activity   Log RFQ Activity	•	.0% -77.	TWP	тмт	SES		03/04/2022	Assigned	Assigned To Sean Sullivan	0.00
	2/ L	CS	Pinnacle Structures, Inc. 2665 Hwy 321 Bypass , Cabot , AR 72023 View   View Activity   Log RFQ Activity		.0% -77.	IN TWP	тмт	TWP		03/03/2022	Job RFQ Submitted	Crane Estimate Submitted275 Ft Runway Supported On Building Columns With Building Haunchs. @ 23ft Support Centers, 13 Fon Capacity 2#13 Fon Bridges Comparing To Kone 28 Eve Hight 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.

Enter ACS Quote/Order Number:	If N/A, provide reason:				
If N/A, leave blank and provide reason in next box	Reason will be emailed to salesperson.				

### 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*	ACS Quote/Order Number/RFQs 💿
American March Activity Type Activity Type  Note Contect Information Select Context Ken Burton : kenneth burton@wile.com : 9015006648  * Printary Department Holte Repair  *	RF0 3755 (Please quote to remove old cantilever (ib and inst) 03/16/0222   Other Departments Cos Cos Cos Cos Cos Cos Cos Cos Cos Co
Date of Activity	Opportunity Amount
2022-03-16	0
Notes/Results	
	Drop files here

## 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.

					DASHBOAR	ND ACC	OUNTS LEAD	DS ACT	VITY QUO	OTES	NEW PROSPECT	RESOURCE LIBRAR	Y REPORTS ADMI	N LOG OUT	٩
AC1 Filter C	IVITY ¤ptions.⇒		/				,							LOG	ACTIVITY
Bran	th V Zone	All Users      Department	All Descriptions All Descriptions Tech Activity ACS Only	Account	Name	1000 ¥	Order by	✓ DESC	Select Da     Today	ate Rang	0 March 202	2	April 2022	м	ay 2022
BR	DEPT		-Job/Quote/Order Activity Job Quote Created Job Entered, From Quote Job Entered Quote Created	* SAL	ES INSIDE	● BY	QUOTE#	₿ DA	E Last 7 D This Wee	ay Days iek	Su Mo Tu We T	h Fr Sa Su I	Mo Tu We Th Fr Sa	Su Mo Tu 1 2 3	3 4 5 6
1В м	HR	MOST_INC. 355 James Lawrence Rd., Jackson, TN 38301 View   View Activity   Log Quote Activity	Order Created Purchase Order Created Job Created Estimate Amount Changed Quote Changed to Order Call Log 	o% JR	U JP2	JAC	147128 Job Estima	03	/16 Last Wei Last Mor This Mor	eek eek onth onth	6         7         8         9         1           13         14         15         16         1           20         21         22         23         2           23         28         20         30         30         30	0         11         12         3           7         18         19         10           14         25         26         17		8 9 10 15 16 17 22 23 24	0 11 12 13 7 18 19 20 4 25 26 27
1A M	IS	KJS MP Joint Venture, LLC 5464 Essex St. Bidg 242, Millington, TN 38054 View   View Activity   Log Quote Activity	Created by Only All Planning Open Planning Only In Person Visits Lest Calls Submitted RFOs	6% G1	YY UNA	JP2	0096543 Dist Quote	03	/16 This Yea	ar ar	27 28 29 30 3	12	23 20 27 20 29 30	29 30 3	
1A M	IS	Memphis Chain & Cable, LLC 581 Pear Avenue, Memphis, TN 38107 View   View Activity   Log Quote Activity	-90.9%	01.0% G	VY JP2	JP2	0096542 Dist Quote	03	/16		Childe	GROWE CITEMEN			0.00
1A M	HR	American Yeast Corp. 2405 North Second Street, Memphis, TN 38127	-00.9%	53.9% G\	YY SLC	JDJ	021325 Job Quote	03	/16/2022	ACS	3	Job Quote Create Rai 147272 Annu	ed all Inspectio:annual 2022 Annual	Periodic	0.00

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.



ACT	VITY												
Filter Op	tions ⇒											OG ACTIVITY	
Branch RUN		All Users V Department V	Submitted RFQs	✓ A	account Name		1000 🗸	Order by V DES	C ✔ Jan 1, 2022 -	Dec 31, 2022 ~			
Saturday, January 1st, 2022 - Saturday, December 31st, 2022													
BR •	DEPT •	ACCOUNT	YTD M/M% •	21+/-% *	SALES	INSIDE 4	BY	QUOTE#	DATE	ТҮРЕ	DESCRIPTION	AMOUNT .	
1А м	HR	American Marsh Contact Kan 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	MR	RELIANE ATLANTIC GROUP LLC Contact: Tim Busby 233 CHRIS LANE_BRANDON_MS 39947 View   View Activity,   Log REQ Activity,	0.0%	50.0%	BCZ	UNA	BCZ		03/14/2022	Job RFQ Submitted	Please Update Quote On Quarterly Vibration And Ir, Need To Schedule Q1 Asap	0.00	
1A M	HR	Steel Warehouse Company, Inc. Contact: David Walden 4740 Hungerford Rd. Memphis. TN 38118 View   View Activity   Log RFQ Activity	0.0%	-00.0%	SSS	JP2	SSS		03/14/2022	Job RFQ Submitted	Rebid Quote 20946 As The Original Winner Of The Bid Did Not Quote Drives. There Bid Was At \$35k Minus The Drives So We Will Still Be High I flive Can Close The Gap David Will Strongly Consider Our Bid At This Point	0.00	
1С М	MR	Cartisle SynTec. Inc. Contact Rad Bross 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 Estuder Line Down To Change Dies. One O'There Estuder Motors is Currently Running Under Voltage Than Archite Estudical. The Encoder Speed Is Also Running Higher Than O'ther. 400tp Estudiet Motor: Wart 16 and Office Henni ar Estudication Motor 3/20 While Is of Offine And We Are Alab To Hook Up To. Please Provide Quote To Ferfance Site Visit	0.00	
2A L	MR	CONWAY COUNTY REGIONAL WATER Contact: Robert Gunderman 30 H20 DR. – PLUMERVILLE AR 72127 View   View Activity,   Log RFQ Activity,	0.0%	201.7%	TWP	тмт	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	IS	REED'S METALS Contact: James Godwin 24350 CO RD - FLORENCE , AL 35633 View   View Activity,   Log Quote Activity,	1000.0%	0.0%	JRU	UNA	JRU	<u>96476</u>	03/10/2022	Order RFQ Submitted	Can You Please Quote Me The Following. Please Send The Quote To Me. Harrington 1 Ton Hots 1151 151 0f Lift Hook On Top They Are Currently Buying Dayton Hots For 3300 But Believe They Get Free Shipping Just Fyi	0.00	
1A M	MR	Process & Power Contact Justin Collver 1721 Corporate Avenue, Memphis. TN 38132 View   View Activity   Log Quote Activity.	-98.9%	210.8%	GWY	SLC	GWY	<u>021287</u>	03/09/2022	Job RFQ Submitted	Justin Is Looking For An Estimate To Recondition (Clean, Dip&Bake, Bearings) On A 460v 400hp Compressor Motor. He Deesn't Have Any Other Info On II Because I Asked.	0.00	