BOUNDARY MINING GROUP INSIDE SALES SOP

NEW RFQ

INTRODUCTION

Tools Used: HubSpot CRM, Visual, Shared Drive (W: Quotes)

Purpose

To ensure consistency and traceability in the sales process from RFQ (Request for Quote) initiation to delivery, ensuring alignment between Outside Sales and Inside Sales teams using HubSpot, Visual, and shared drive systems.

Scope

This SOP applies to all sales activities involving RFQs, New Components, and Repairs handled by the Inside Sales teams.

BOUNDARY™

DATE
05/20/2026

APPLIES TO
Inside Sales Team

Detailed Procedure – RFQ

1. RFQ Email Notification – Initiating the RFQ for the Inside Sales Team

When a new RFQ is **submitted by Outside Sales**, an **email is automatically triggered** to the Inside Sales inbox with the following details:

Email format includes:

- HubSpot RFQ ID
- Requested by
- Priority
- Company Info / Parent
- Contact Info
- Quote Due Date: (e.g., 5/24/25)
- Expected Ship Date: (e.g., 5/30/25)
- RFQ Notes: Review this carefully — it includes key requirements, background, and quote details.
- Attachments: Supporting images and/or PDFs

> **Important:** If any required information is unclear or missing:
>
> - Open the RFQ in HubSpot → In the **left panel**, select **Reject RFQ** from the dropdown.
> - A pop-up will prompt you to **enter the reason.**
>
> The assigned Outside Sales Rep will be notified to revise and tag you back.
> **All interactions are timestamped** for traceability.

2. Create the Quote in Visual

- Copy the **HubSpot RFQ ID** from the HubSpot email.
- In **Visual**:
    - Start a **new quote** based on the RFQ.
    - Go to the “Boundary” tab → Paste the **HubSpot RFQ ID** into the "**HubSpot RFQ**" field to ensure traceability between systems.

3. Finalize and Save the Quote

Once the quote is complete:

- Save the file as a PDF using this format:
  Quote Number - Company Name- Product or Service.pdf
  Example: E00123-Q - ABC Mining - Hydraulic Cylinder.pdf

- Save the PDF to: **W:\Quotes.**

Result:

- HubSpot is automatically updated to "Quote Issued to Out Sales Rep"
- The PDF is attached to the original RFQ.

> **Minor Corrections:** (e.g., sales rep, date, T&Cs)
>
> If revisions are needed:
> Save a new PDF using the same **filename + suffix** for clarity.
>
> Example: *E00123-Q - REV2 - ABC Mining - Parts-date.pdf*

- Save the new PDF to: **W:\Quotes.**

4. Handoff to Outside Sales

- Once the quote is saved, HubSpot triggers a **notification** to the **Deal Owner (Outside Sales)**.
- Outside Sales:
  - Sends it manually to the **customer (via e-mail).**
  - Updates the **HubSpot Deal Stage** to: "Quote Issued to Customer"

5. Revisions & Outcome Tracking

- Outside Sales moves the deal card to "**Quote Rev Request**" → Adds **revision notes** for Inside Sales
- Inside Sales receives a **notification email**
- Once the revised quote is ready – Drag and drop the card to "Quote Issued to Out Rep"

Tips for Clarity & Consistency

- Always **double-check RFQ notes** before starting the quote.
- Use **precise filenames** to avoid confusion.
- For all emails or file changes, **ensure timestamps and tagging** are properly used in HubSpot.