BOUNDARY MINING GROUP
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 Outside Sales and Inside Sales teams.

BOUNDARY™

DATE	APPLIES TO
05/20/2026	Outside Sales Team

Detailed Procedure - RFQ

1. Outside Sales – Initiating the RFQ

- Verify if customer information already exists in HubSpot. On the left sidebar, **choose CRM (Second Icon)** → **Companies** → Search company in the search bar.
- If not, proceed to create a new company and contact record.

1.1 Create Company in HubSpot

Navigate to the **"Companies"** section → **"Create Company"** and enter:

- Company Domain - website
- Company Name
- Category (Dealer, End-User, Vendor)
- Lead Source – create explanation on each lead source (Other Lead – Open text field) – If Other please comment
- Industry/Market
- Country/Region

1.2 Create Contact in HubSpot

Navigate to the **"Contacts"** section → **"Create Contact"** and fill in:

- Email Address
- First Name
- Last Name
- Lead Source
- Job Title
- Contact Owner
- Phone Number
- Associate with the company created in 1.1

2. Create a New Deal in HubSpot

- In HubSpot, in the correct **Company Page** → **“Add a Deal”** on the top right-side bar.
- Enter the following deal details:
  - Deal Name: [Company Name - Product/Service
  - Pipeline: RFQ
  - Deal Stage: New Opportunity
  - Priority: Low/Medium/High
  - Deal Owner – The outside sales rep responsible for that account
  - Site ID – Enable Sales Reps on our Site IDs
  - RFQ Due Date
  - Desired Ship Date
  - RFQ Notes – The most important field– fill in with all information you need to share with your Inside Sales Rep

        - Part Number available – OEM and/or Boundary
        - Product description
        - Additional description
        - Requested price – market price
        - Previous quote number if available
        - FOB terms
        - Currency
    - Attach Supplement file if needed
    - If the contact remains in the thread – it will be logged. If the customer is no longer there is no track.

> Your quote request will be sent to your Inside Sales Rep and will be **time-stamped and tracked** on your company/contact log.
>
> You will receive an email from HubSpot once your quote is ready.

⚠ **Important:** If any required information is **unclear or missing** your inside sales will **reject your quote**.

If an RFQ is Rejected by Inside Sales:

If Inside Sales identifies **missing or unclear information**, they may **Reject the RFQ directly in HubSpot**.

→ You will receive a **notification email** with the **reason for rejection**.

Once Notified:

- **Review** the RFQ and **rejection notes** carefully.
- **Update the RFQ Notes** with the required details or clarifications.
- **Tag Inside Sales** in the notes to notify them the updates are complete.
- **Add as many comments as needed** until required information is complete.

⚠ *All updates and comments are timestamped in HubSpot for reference and traceability.*

📌 Be **clear and detailed** in your updates to avoid delays in quote processing.

Quote Ready

Once you receive the HubSpot email notifying that your quote is ready, it's time to send it to the customer.

1. Outside Sales – Submitting quote to Customer

Click the link in the email or go to "**CRM"** on the left sidebar → **"Deals"**. Use the search bar to locate your quote or scroll to the **"Quote Issued to Out Sales Rep" column.**

- Open the Quote → Go to **"Visual PDF"** on the left side bar and download the file. –
- Attach the downloaded file to the email to your customer, as you normally do.
- Once the quote is sent to your customer, you **must** update HubSpot: Drag and Drop your quote to **"Quote Issued to Customer" column.**

Customer Response - Next Steps

Once you receive a response from the customer regarding the quote, it's time to update HubSpot and proceed with the next steps.

- **Quote Approved:**
  - Once the quote is approved by the customer, you must update HubSpot: Drag and Drop your quote to **"Quote Won"**. Send the PO email to your inside sales rep and boundary@boundaryequipment.com & info@issminesafety.com

    > Your quote has completed the **RFQ pipeline** and a new card will be created in the **Orders pipeline** – once Inside Sales create an Order in Visual**.**

- **Quote Lost:**
  - If you quote has been rejected by the customer with no chance of negotiating: Drag and Drop your quote to **"Quote Lost"**. A mandatory question will pop up, please choose Lost reason to help us track how to better guide our sales strategy.

    > Your quote has completed the **RFQ pipeline.** No further actions.

- **Quote Revision Requested:**
  - If you have entered a negotiation stage on your quote and needs revision done by the inside sales team, please update HubSpot: Drag and Drop your quote to **"Quote Revision Requested"**.

- There will be a prompt with a text block to be filled in.

- You will receive an email from HubSpot once your quote is ready. Open the Quote → Go to **"Visual PDF"** on the left side bar and download the file.
- Attach the downloaded file to the email to your customer, as you normally do.
- Once the quote is sent to your customer, you must update HubSpot: Drag and Drop your quote to **"Quote Issued to Customer"**.

> Your quote has restarted the process, and you can have as many revisions requested as needed. Just repeat the steps.

- **Deferred Follow-Up:**
  - In the instance where your customer does not wish to proceed with the order at this time, but is not yet a lost quote, please update HubSpot: Drag and Drop your quote to **"Deferred Follow up"**. A mandatory question will pop up, please fill up the reason and date for follow-up.

> You will receive an email reminder on the date selected. Please move your quote to "Sent to Customer" after following up.