









<b>Operation/Task:</b>	Electronic Request for Estimates (RFE)			<b>Equipment:</b>	N/A
<b>Owner:</b>	Client Services Manager	<b>Date Prepared:</b>	3/19/20	<b>Department:</b>	Sales / Client Services
		<b>Revision History:</b>	See last page		

ALERTS (see below): Critical Step  Quality Check  Tip  Team Safety 

**Purpose:** This SOP/work instruction describes the process of submitting an electronic/paperless Estimate Request.

Step #	Alerts	Step Description - "What to Do"	"How to Do it"	"Why to Do it"
1	 	Fill out the electronic RFE Form through the <a href="#">ENPOINTE eHub – Sales Portal</a> .	Fill out the electronic RFE Form through the <a href="#">ENPOINTE eHub – Sales Portal</a> .  Capture all necessary specifications prior to submitting. <b>Review all forms before submitting to Estimating.</b>	Provide Estimating clearly defined expectations to ensure accurate and efficient processing of RFE submissions. This is important as it will minimize questions on vague or conflicting information once in Estimating.
2	 	Estimating – Process and return to Sales and/or the Requestor	Estimate and Quote Letter will be returned via email to Sales and/or the Requestor. <ul style="list-style-type: none"> <li><b>Prior to the quote being submitted to the customer it must be reviewed for accuracy, by verifying final price(s).</b></li> </ul> Estimating will retain a saved copy of the estimate for future accessibility and reference by the Estimating Team.	Quotes are client facing documents and estimates are used internally. It's important a review and verification is done prior to sending to the client.
3		<b>REVISED RFE</b>	Fill out the electronic RFE Form through the <a href="#">ENPOINTE eHub – Sales Portal</a> .  For revisions, indicate revisions to Estimate # or Job #.	Provide Estimating clearly defined expectations to ensure accurate and efficient processing of RFE submissions. This is important as it will minimize questions on vague or conflicting information once in Estimating.

4	◆ <input checked="" type="checkbox"/>	Estimating – Process and return to Sales and/or the Requestor	<p>Estimate and Quote Letter will be returned via email to Sales and/or the Requestor.</p> <ul style="list-style-type: none"> <li>• <b>Prior to the quote being submitted to the customer it must be reviewed for accuracy, by verifying final price(s).</b></li> </ul> <p>Estimating will retain a saved copy of the estimate for future accessibility and reference by the Estimating Team</p>	Quotes are client facing documents and estimates are used internally. It's important a review and verification is done prior to sending to the client.
5	◆ <input checked="" type="checkbox"/>	<p>Submitting job to CSR Initiate the job through <a href="#">ENPOINTE eHub – Sales Portal</a> and an automated email will be sent to your CSR.</p> <p><i>Please partner with your CSR on what electronic documents work most efficiently when submitting jobs. The goal is to ensure clear accurate information is shared so the job submission can be processed and moved forward seamlessly.</i></p>	<p>Initiate the job through <a href="#">ENPOINTE eHub – Sales Portal</a> and an automated email will be sent to your CSR.</p> <p>If filled out completely and accurately, this form is all that is required by the CSR. If you have an electronic PO, or other necessary attachments, you may attach that to the documents and they will be included in the email to the CSR.</p>	This ensures the job details are clear and helps streamline processing of the job. It also eliminates error and slowdowns due to lack of job details, assumption and back and forth communications between CSR and Sales.
Notes:				

Definitions:
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Revision History	Description of Changes	Requested by	Date
Rev 1	First posting to intranet	Michelle Motschke	3/20/20
Rev 2	Updated to current SOP format: gray header bar; branding updated: font size/type, changed GLS reference to ENPOINTE; changed form numbers in Step 1 How To Do It. Changed Owner to Client Services Manager.	Liz Nourse	4/19/21
Rev 3	Removed references to STP	Liz Nourse	6/9/23
Rev 4	Removed references to physical RFEs and updated to include eHub submissions.	Kevin Weiss	5/29/2026