



Arturo Bejarano
arturo.bejarano@intcomex.com
Cloud Operations

Quotation Tool

Funcionalidad

Quotation Tool - Usage

Login to the Intcomex Cloud Platform portal and select the **Quotation Tool** option in the upper menu

The screenshot displays the Intcomex Cloud Platform portal interface. The top navigation bar includes the Intcomex logo, a home icon, and menu items for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user's name, Arturo Bejarano, is visible in the top right corner.

On the left side, there is a 'COMPANY HIERARCHY' sidebar with a search bar and a list of companies. The 'Intcomex Bermuda' company is selected, and its details are shown in the main content area.

The main content area is titled 'Intcomex Bermuda' and features a navigation bar with tabs for OVERVIEW, SUPPORT, AVAILABLE SERVICES, BILLING, PROVISIONING, SECURITY, and AUDIT LOG. The 'OVERVIEW' tab is active.

The 'COMPANY DETAILS' section includes the following information:

Company name	Intcomex Bermuda
Domain	intcomex.com intcomex.be
Numeric id	700018
VAT Id	65-0083438
Parent numeric Id	700001
MPN ID	
Invoice split by customer	

The 'ACCOUNT INFORMATION' section includes the following information:

Language	Spanish
Marketplaces	Intcomex Costs BM Intcomex Costs

The 'CONTACT DETAILS' section includes the following information:

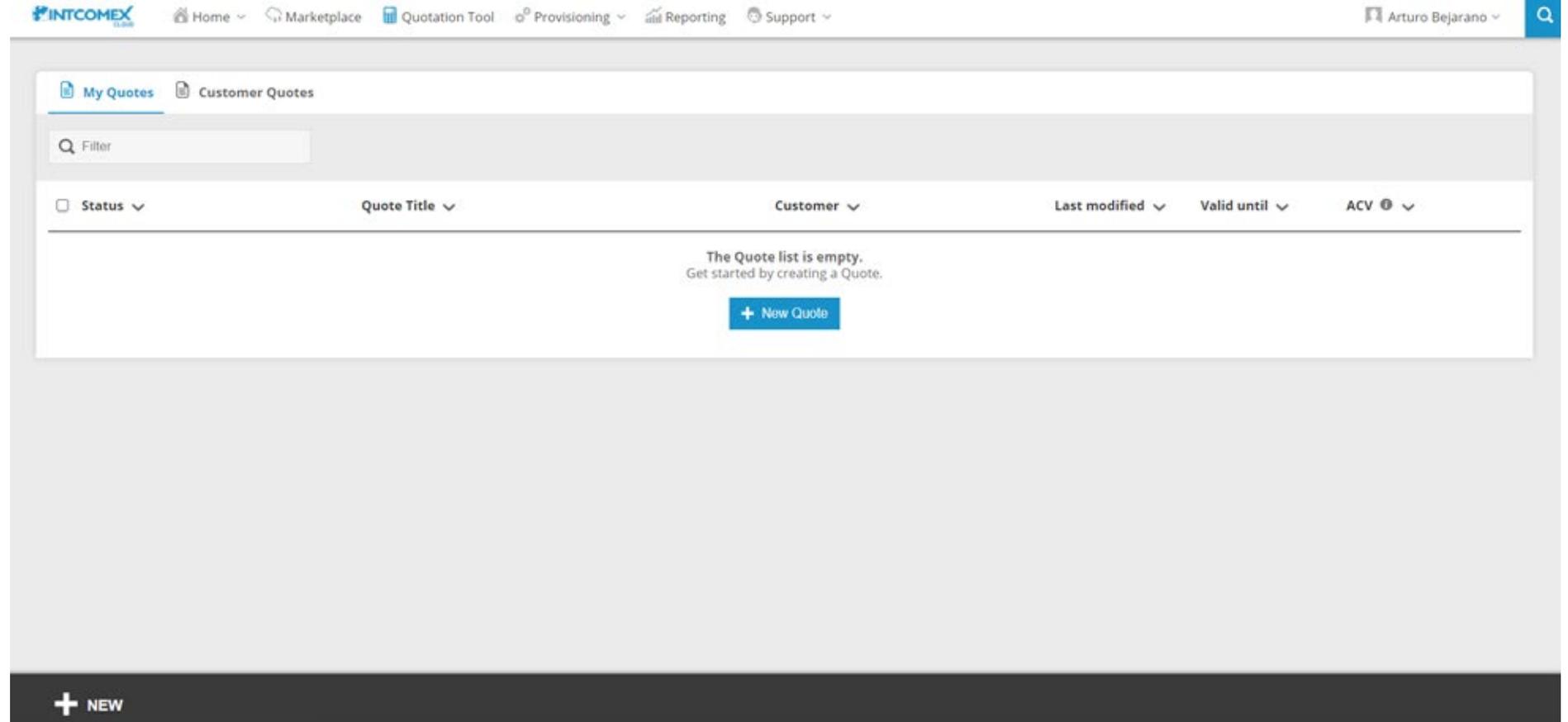
Address	3505 NW 107th Ave Doral FL FL 02 Bermuda
City	Doral
Country	Bermuda
Zip	33178
Email	aldo.barrios@intcomex.com
Contact phone	
Contact person	
Technical contact	Aldo Barrios
Technical Contact Email	aldo.barrios@intcomex.com

The 'PAYMENT DETAILS' section includes the following information:

Billing start date	2017-01-25 01:55 (UTC)
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Quotation Tool - Usage

Choose the **Quote option** to enter a new quote



The screenshot displays the INTCOMEX Quotation Tool interface. At the top, there is a navigation bar with the INTCOMEX logo and menu items: Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user's name, Arturo Bejarano, is visible in the top right corner. Below the navigation bar, there are two tabs: 'My Quotes' (selected) and 'Customer Quotes'. A search bar labeled 'Filter' is present. Below the search bar, there is a table header with columns: Status, Quote Title, Customer, Last modified, Valid until, and ACV. The table content is empty, displaying the message: 'The Quote list is empty. Get started by creating a Quote.' A blue button labeled '+ New Quote' is centered below the message. At the bottom left of the interface, there is a '+ NEW' button.

Quotation Tool - Usage

Complete the form according to the instructions detailed below

The screenshot displays the 'Quote Creation' form in the Intcomex Quotation Tool. The interface includes a navigation bar at the top with links for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user's name, Arturo Bejarano, is visible in the top right corner. The form is divided into several sections:

- Quote Information:** Includes fields for Quote name*, Quote owner* (arturo.bejarano@intcomex.be), External quote ID (Enter ID), Currency* (USD), Offer valid until (Select date), and Service source (My Marketplaces selected, Explore (all services) available). There is also a checkbox for 'Open to CSP'.
- Customer Information:** Includes fields for Customer* (Choose customer), Contact person* (Enter contact person name), Email* (Enter contact person email), Employee amount, Industry (Choose industry), Turnover (\$), and Budget (\$). A checkbox for 'Existing Customer' is checked.
- Services:** A table with columns for Service name, Product Number, Attributes, Fee Type, Price per unit, and Selling price. The table is currently empty, with a message: 'The service list is empty. Get started by adding a service.' and an '+ Add Service' button.

At the bottom left of the form, there is a '+ NEW' button. At the top right of the form, there are buttons for 'Save as a draft' and 'Create Quote'.

Quotation Tool - Usage

- ✓ Open to CSP (\$): Opportunity that comes from the OPEN program
- ✓ Quote name: Enter the name you want to use for the quote
- ✓ Quote owner: User making the quote
- ✓ External quote ID: Consecutive number assigned to the quote
- ✓ Offer valid until: Quote deadline
- ✓ Service source

My Marketplace: Select this option if you have a price list. In this case the margin is set automatically

Explore (all services): Select this option to see all the available products. In this case the margin must be configured manually.

Quotation Tool - Usage

- ✓ Existing Customer: Uncheck this option if the client hasn't been created in ICP
- ✓ Customer: Client's company name
- ✓ Contact persona : Name of the person to contact
- ✓ Email: Customer email
- ✓ Employee amount: Number of employees (Optional)
- ✓ Industry: Type of industry (Optional)
- ✓ Iturnover (\$)
- ✓ Budget (\$)

Quotation Tool - Usage

Proceed to add the services using the option

+ Add Service

The screenshot displays the 'Quote creation' interface in the INTCOMEX Cloud system. The top navigation bar includes the INTCOMEX logo and menu items: Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user profile 'Arturo Bejarano' is visible in the top right corner.

The main content area is titled 'Quote creation' and features two tabs: 'My quotes' and 'Customer quotes'. The 'Customer quotes' tab is active. The form is divided into two main sections: 'Quote information' and 'Customer information'.

Quote information:

- Quote name*: TECWYA 10-05-21
- Quote owner*: arturo.bejarano@ntcomex.be
- External quote ID: 0021-12448
- Currency*: USD
- Offer valid until: 31/10/2021
- Service source: My Marketplaces, Explore (all services)
- Marketplace: Marketplace 1 (8) x

Customer information:

- Customer*: Choose customer (dropdown)
- Contact person*: John Doo
- Email*: abc@xyz.com
- Employee amount: (dropdown)
- Industry: Choose industry (dropdown)
- Turnover (\$): (dropdown)
- Budget (\$): (dropdown)
- Attachments: Attach files (button)

Buttons for 'Save as a draft' and 'Create quote' are located in the top right of the form area.

Services:

A table with the following columns is shown: Service name, Product number, Attributes, Fee type, Price per unit, and Selling price. The table is currently empty, with a message below it: 'The service list is empty. Add a service to get started.' A '+ Add Service' button is located in the top right corner of the services section.

A '+ NEW' button is located at the bottom left of the interface.

Quotation Tool - Usage

Select the services that you want to provision with a quick search using either the search engine or predefined filters.

The screenshot displays the 'Add service to quote' interface. At the top, there is a search bar with the placeholder text 'Enter service name or product number' and a 'Search' button. Below the search bar are three dropdown menus for 'Categories', 'Vendors', and 'Tags', and a 'Sort by' dropdown. The main area contains a list of services, each with a small icon, the service name, and the vendor 'Microsoft'. The services listed include:

- Microsoft 365 Business Standard
- Microsoft 365 Business Basic
- Microsoft 365 Apps for business
- Exchange Online (Plan 1)
- Microsoft Teams Commercial Cloud T...
- Power BI Pro
- Office 365 E3
- Project Plan 3
- Exchange Online Kiosk
- Visio Plan 2
- Windows Server 2019 Standard
- Microsoft 365 Business Standard Trial
- Microsoft 365 Apps for enterprise
- Office 365 E1
- Office 365 A1 for faculty
- Exchange Online (Plan 2)
- Office 365 A1 for students
- Windows Server 2019 CAL
- Azure Plan
- Microsoft 365 Business Premium

At the bottom of the list, there is a pagination control showing '1 - 20 of 1273 items' and a set of navigation buttons (back, forward, and page numbers).

Quotation Tool - Usage

Then, select the number of seats and the recurrence of the subscription.

Monthly

Annually

Finally, click on **+ Add service**

The screenshot shows a web interface for adding a service to a quote. The main heading is "Add service to quote" with a search path for "Microsoft 365 Business Standard". Below this, the service name "Microsoft 365 Business Standard" is displayed with a blue "Add service" button. Pricing information shows a cost of \$50.00 and a selling price of \$4.00, both as monthly fees. Vendor details include "Microsoft" and "Communication & Office". Configuration options include "Number of CSP licenses" set to 5 and "Billing Type" set to "Monthly". A "Recommended services" section at the bottom lists five options: Microsoft Organization, Microsoft 365 Business Basic, Exchange Online (Plan 1), Power BI Pro, and Office 365 E3.

Quotation Tool - Usage

If you choose a Microsoft service you will have to add the Microsoft Organization tenant service by choosing the **+ Add service** button. This is a free service so it will not affect the amount of the quote.

The screenshot displays the Intcomex Quotation Tool interface. The top navigation bar includes links for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support, along with a user profile for Arturo Bejarano. The main section is titled "Services" and features a table with columns for Service name, Product Number, Attributes, Fee Type, Price per unit, and Selling price. A row for "Microsoft 365 Business Basic (Microsoft)" is selected, showing a product number of AAA-10624 and a monthly fee of 4.32 \$ per unit. Below the table, a message indicates that additional services are required, specifically a "Microsoft Organization tenant" service. A form below this message allows for configuring the service, including a "Number of CSP licenses" dropdown set to 1 and a "Billing Type" dropdown set to "Monthly". The form also displays the "Cost" as 4.00 \$ Monthly Fee and the "Selling price" as 4.32 \$ Monthly Fee. At the bottom right, there are "Cancel Changes" and "Save Service" buttons. A footer bar shows a "+ NEW" button and a "Total (Monthly Fee)" of 4.32 \$.

Quotation Tool - Usage

To modify the details of the subscription to be quoted, click on the 3 dots located on the right side of each line. Then, click on Edit. To delete the line click on Delete

The screenshot displays the 'Edit quote' interface in the Intcomex Quotation Tool. The top navigation bar includes 'Home', 'Marketplace', 'Quotation Tool', 'Provisioning', 'Reporting', and 'Support'. The user 'Arturo Bejarano' is logged in. The interface is divided into several sections:

- Quote information:** Includes fields for 'Quote name*' (TECWYA 10-10-21), 'Quote owner*' (arturo.bejarano@intcomex.be), 'External quote ID' (0021-12448), 'Currency*' (USD), 'Offer valid until' (31/10/2021), 'Service source' (My Marketplaces), and 'Marketplace' (Marketplace 1 (8) x).
- Customer information:** Includes fields for 'Customer*' (TECWYA), 'Contact person*' (Wendy Rojas), 'Email*' (wendy.rojas@tecwya.com), 'Employee amount', 'Industry' (Choose industry), 'Turnover (\$)', 'Budget (\$)', and 'Attachments' (Attach files).
- Services:** A table listing services with columns for Service name, Product number, Attributes, Fee type, Price per unit, and Selling price. A '+ Add Service' button is present.

Service name	Product number	Attributes	Fee type	Price per unit	Selling price
Microsoft Organization tenant (Microsoft)	-	-	-	-	-
Microsoft 365 Business Basic (Microsoft)	AAA-10624	Monthly (Billing Type), 5 (Number of CSP licenses)	Monthly fee	4.32 \$	21.60 \$
Total (Monthly fee):					21
Annual Contract Value:					259.20 \$

At the bottom left, there is a '+ NEW' button. A dropdown menu is visible next to the 'Microsoft 365 Business Basic' row, containing 'Delete' and 'Edit' options.

Quotation Tool - Usage

Once the services have been added, click on **Finish creation** to create the quote. To save the quote as a draft clic on **Save as a draft**

The screenshot displays the 'Edit quote' interface in the INTCOMEX Quotation Tool. The form is divided into several sections:

- Quote information:** Includes fields for Quote name* (TECWYA 10-10-21), Quote owner* (arturo.bojarano@intcomex.be), External quote ID (0021-12448), Currency* (USD), Offer valid until (31/10/2021), Service source (My Marketplaces), and Marketplace (Marketplace 1 (B)).
- Customer information:** Includes Customer* (TECWYA), Contact person* (Wendy Rojas), Email* (wendy.rojas@tecwya.com), Employee amount, Industry (Choose Industry), Turnover (\$), Budget (\$), and Attachments (Attach files).
- Services:** A table listing added services with columns for Service name, Product number, Attributes, Fee type, Price per unit, and Selling price.

Service name	Product number	Attributes	Fee type	Price per unit	Selling price
Microsoft Organization tenant (Microsoft)	-	-	-	-	-
Microsoft 365 Business Basic (Microsoft)	AAA-10624	Monthly (Billing Type), 5 (Number of CSP licenses)	Monthly fee	4.32 \$	21.60 \$
Total (Monthly fee):					21.60 \$

Buttons for 'Save draft' and 'Finish creation' are visible in the top right corner of the form. A '+ NEW' button is located at the bottom left of the interface.

Quotation Tool - Usage

Finally, you will find the detail of the quote generated. You can export it in PDF or XLSX format.

If you need to correct the quote, click on

[Modify Quote](#)

My Quotes **Customer Quotes**

< Back to Quote list

Quote details (000246)

Export PDF Export XLSX [Modify Quote](#)

Quote Information Open to CSP ⓘ

Quote name	Status	External quote ID
TECWYA S.A.C. - 10.05...	Active	0021-12448
Quote owner	Offer valid until	Quote owner
arturo.bejarano@int...	5/31/2021	5/10/2021
Currency		
USD		

Customer Information

Customer	Contact person	Budget (\$)
TECWYA S.A.C.	Wendy Rojas	
Email	Employee amount	
wendy.rojas@tecwya...	20	
Industry	Turnover (\$)	
Manufacturing		

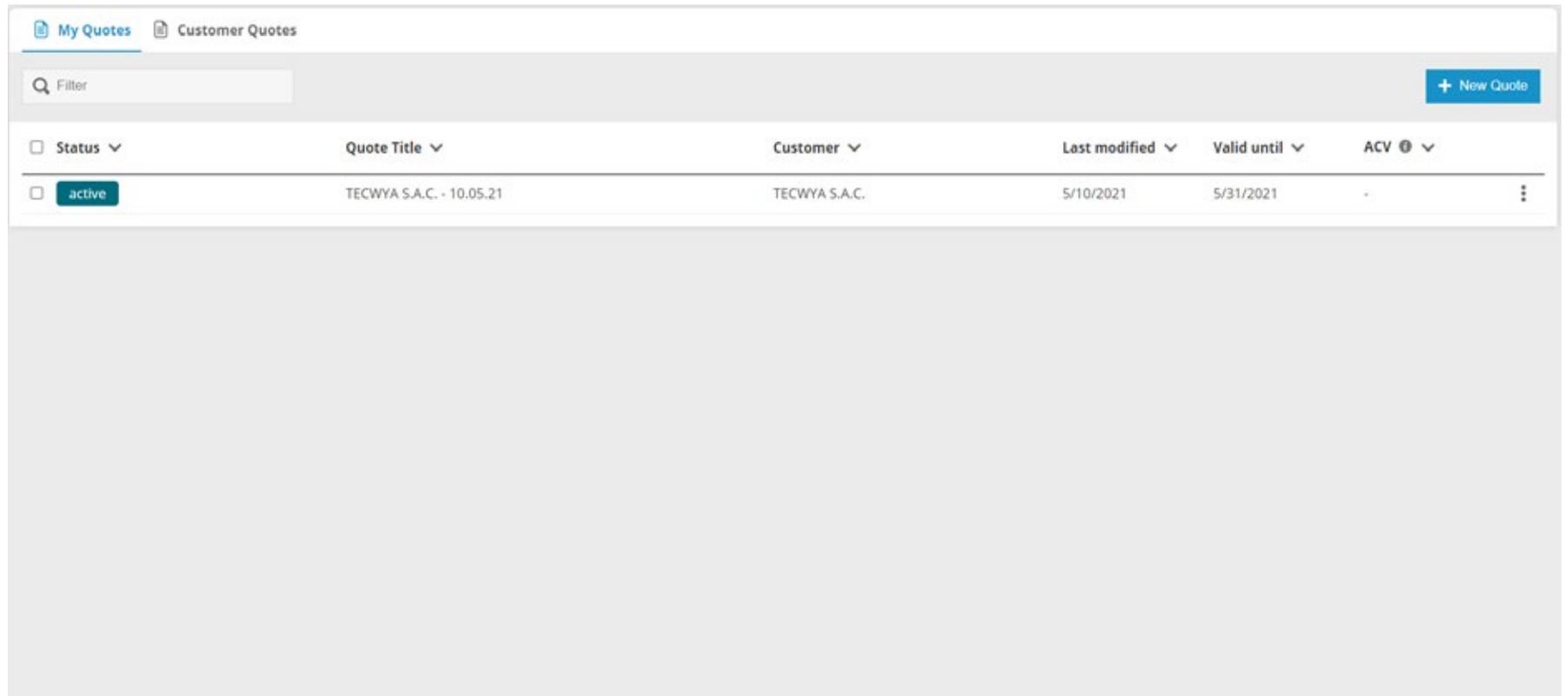
Services

Service name	Product Number	Attributes	Fee Type	Price per unit	Selling price
Microsoft 365 Business Basic (Microsoft)	AAA-10524	Annually prepaid (Billing Type), 5 (Number of CSP licenses)	Per 12 month(s)	4.32 \$	21.60 \$
Microsoft Organization tenant (Microsoft)	-	-	-	-	-
Total (Pre-paid):					259.20 \$
Annual Contract Value:					259.20 \$

Quotation Tool - Usage

To view the registered quotes, click on the submenu **My Quotes**

To view the details of the quote, just click on the required line.



The screenshot displays the 'My Quotes' interface. At the top, there are two tabs: 'My Quotes' (selected) and 'Customer Quotes'. Below the tabs is a search bar labeled 'Filter' and a '+ New Quote' button. The main content is a table with the following columns: Status, Quote Title, Customer, Last modified, Valid until, and ACV. A single quote is listed with the status 'active', title 'TECWYA S.A.C. - 10.05.21', customer 'TECWYA S.A.C.', last modified date '5/10/2021', and valid until date '5/31/2021'. A vertical ellipsis menu icon is visible at the end of the row.

Status	Quote Title	Customer	Last modified	Valid until	ACV
active	TECWYA S.A.C. - 10.05.21	TECWYA S.A.C.	5/10/2021	5/31/2021	-



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CLOUD