



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. The top navigation bar includes the Intcomex logo, a home icon, and menu items: Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user's name, Arturo Bejarano, is in the top right corner. On the left, a 'COMPANY HIERARCHY' sidebar lists various entities, including Intcomex Bermuda, ArturoResellerDemo3, ArturoResellerDemo4, Bavaria, Beatriz Montoya, Bejarano, CATO CLOUD, CLAUDIA SANCHEZ, Cloud Colombia, DEMO RESELLER, DemoNest, DemoTest, Demoxgt, DIANA NARVAEZ, GINA SANCHEZ, ICP Certification XSV, ICP Certification XCB XPA, and ICP Certification XSV. The main content area is titled 'Intcomex Bermuda' and features tabs for OVERVIEW, SUPPORT, AVAILABLE SERVICES, BILLING, PROVISIONING, SECURITY, and AUDIT LOG. The 'OVERVIEW' tab is active, showing three sections: COMPANY DETAILS, ACCOUNT INFORMATION, and CONTACT DETAILS. The COMPANY DETAILS section includes fields for Company name, Domain, Numeric id, VAT Id, Parent numeric Id, MPN ID, and Invoice split by customer. The ACCOUNT INFORMATION section includes Language and Marketplaces. The CONTACT DETAILS section includes Address, City, Country, Zip, Email, Contact phone, Contact person, Technical contact, and Technical Contact Email. A PAYMENT DETAILS section at the bottom shows the Billing start date.

COMPANY DETAILS	
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	

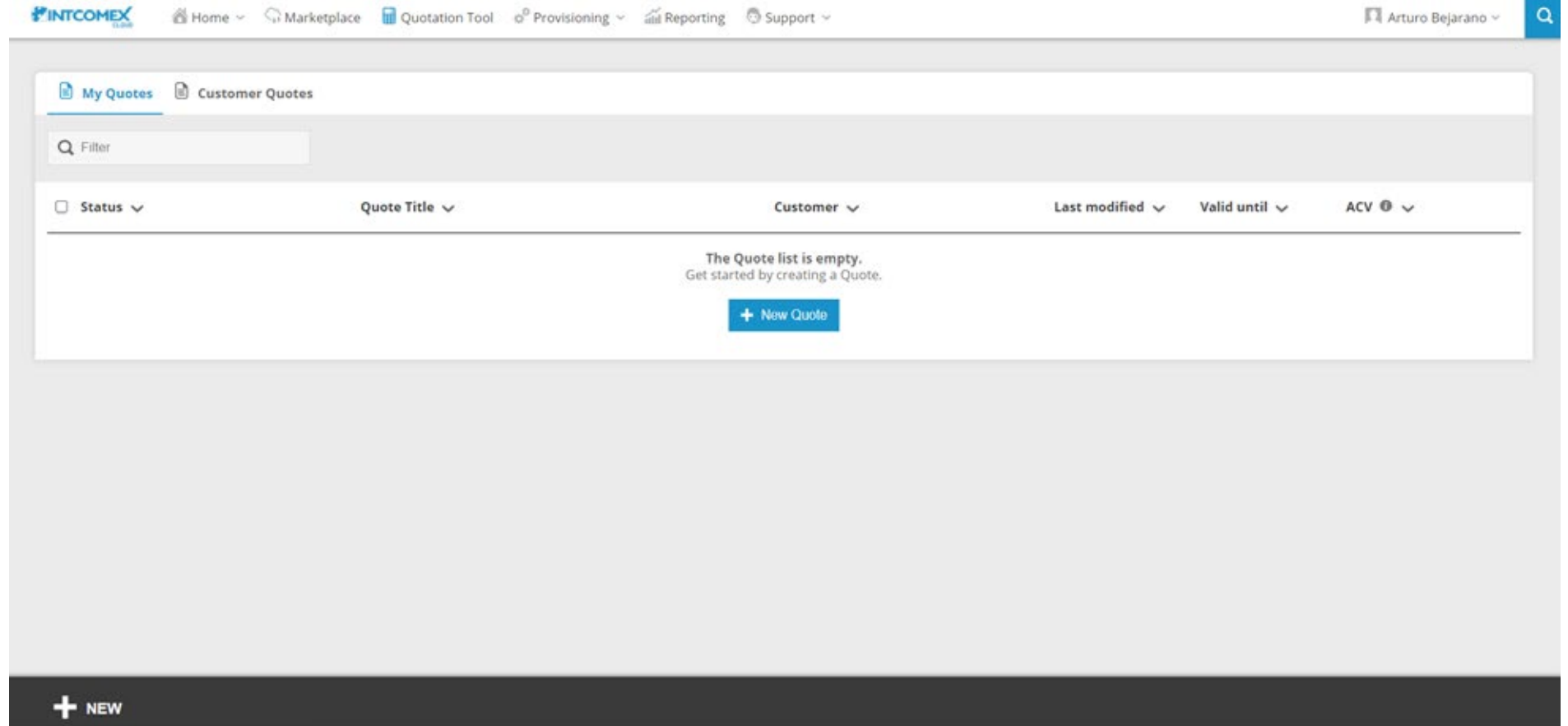
CONTACT DETAILS	
Address	3505 NW 107th Ave Doral FL FL 02 Bermuda
City	Doral
Country	Bermuda
Zip	33178
Email	aldo.barrios@intcomex.com
Contact phone	
Contact person	
Technical contact	Aldo Barrios
Technical Contact Email	aldo.barrios@intcomex.com

ACCOUNT INFORMATION	
Language	Spanish
Marketplaces	Intcomex Costs BM Intcomex Costs

PAYMENT DETAILS	
Billing start date	2017-01-25 01:55 (UTC)

Quotation Tool - Usage

Choose the
Quote option to
enter a new quote



Quotation Tool - Usage

Complete the form
according to the instructions
detailed below

The screenshot displays the 'Quotation Tool' interface within the Intcomex Cloud application. 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 content area is titled 'Quote Creation' and features two tabs: 'My Quotes' and 'Customer Quotes'. The form is divided into three main sections: 'Quote Information', 'Customer Information', and 'Services'.

Quote Information (with an 'Open to CSP' toggle):

- Quote name*: Enter quote name
- Quote owner*: arturo.bejarano@intcomex.be
- External quote ID: Enter ID
- Currency*: USD
- Offer valid until: Select date
- Service source: My Marketplaces (selected) or Explore (all services)
- Marketplace: Select marketplace

Customer Information (with an 'Existing Customer' toggle):

- Customer*: Choose customer
- Contact person*: Enter contact person name
- Email*: Enter contact person email
- Employee amount: (dropdown)
- Industry: Choose industry
- Turnover (\$): (dropdown)
- Budget (\$): (dropdown)

Services (with an 'Add Service' button):

Service name	Product Number	Attributes	Fee Type	Price per unit	Selling price
The service list is empty. Get started by adding a service.					

At the bottom left, there is a '+ NEW' button.

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 of the Intcomex Quotation Tool. The top navigation bar includes the Intcomex logo and links for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user 'Arturo Bejarano' is logged in. The interface 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 (selected), Explore (all services)
- Marketplace:** Marketplace 1 (8) x

Customer information:

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

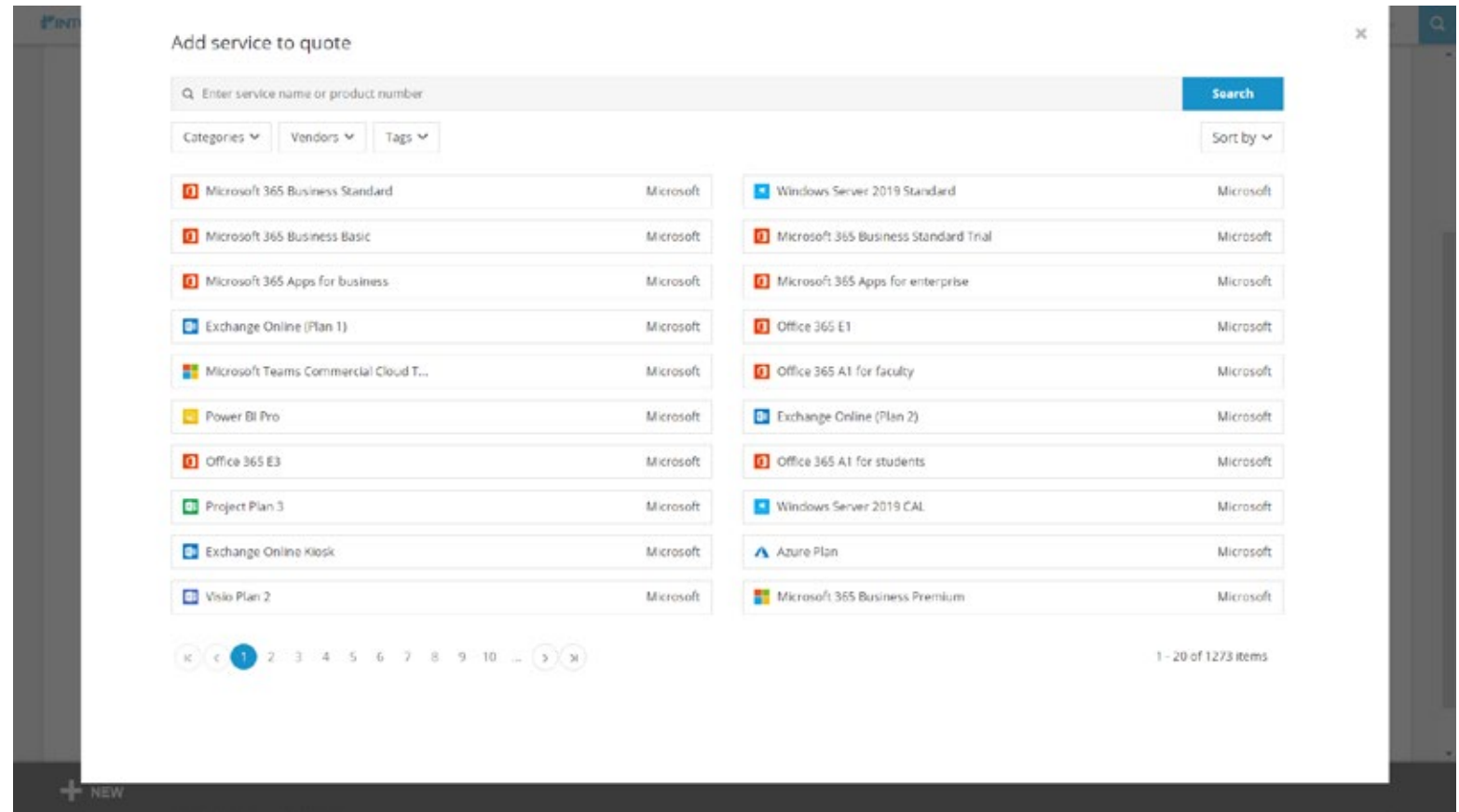
Services:

A table with columns: 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. Add a service to get started.' A '+ Add Service' button is located at the top right of the table.

At the bottom left, there is a '+ NEW' button.

Quotation Tool - Usage

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



Quotation Tool - Usage

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

Monthly

Annualy

Finally, click on **+ Add service**

The screenshot shows a web interface for adding a service to a quote. The title is "Add service to quote". Below it, a search bar shows "Microsoft 365 Business Standard". The main heading is "Microsoft 365 Business Standard" with a blue "Add service" button. The interface displays pricing: "Cost" is 50.00 \$ Monthly fee, and "Selling price" is 54.00 \$ Monthly fee. It lists the vendor as Microsoft, category as Communication & Office, and vendor SKU as AAA-10647; AAA-10647; AAA-10647. Tags include E-Mail, Cloud Storage, File Management, Audio-Video Conferencing, and Office Suite. The marketplace is listed as Marketplace 1 (8). A link for "More service info..." is provided. The "Configuration" section includes a "Number of CSP licenses" field set to 5, with a note "YOU MUST ENTER A WHOLE NUMBER (MIN: 0, MAX: 300)". A "Billing Type" dropdown is set to "Monthly", with a note "This field is linked to BillingType". The "Recommended services" section shows five icons: 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 Cloud Quotation Tool interface. The top navigation bar includes links for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user's name, Arturo Bejarano, is visible in the top right corner.

The main section is titled 'Services' and contains a table with the following columns: 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 365 Business Basic (Microsoft)	AAA-10624	Monthly (Billing Type), 1 (Number of CSP licenses)	Monthly Fee	4.32 \$	4.32 \$

Below the table, a message states: 'Additional service(s) required: Microsoft 365 Business Basic requires the following service(s) to be added:'. A search bar shows 'Microsoft Organization tenant' with a '+ Add service' button.

Summary information is displayed below the search bar:

- Cost: 4.00 \$ Monthly Fee
- Selling price: 4.32 \$ Monthly Fee

The form below includes a 'Number of CSP licenses' input field (set to 1), a 'Billing Type' dropdown menu (set to Monthly), and buttons for 'Cancel Changes' and 'Save Service'.

At the bottom right, the 'Total (Monthly Fee)' is shown as 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 Cloud Quotation Tool. The interface is divided into several sections for managing quote details.

Quote information (Open to CSP):

- 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, ☐ Explore (all services)
- Marketplace: Marketplace 1 (8)

Customer information (Existing customer):

- Customer*: TECWYA
- Contact person*: Wendy Rojas
- Email*: wendy.rojas@tecwya.com
- Employee amount: [dropdown]
- Industry: Choose industry
- Turnover (\$): [dropdown]
- Budget (\$): [dropdown]
- Attachments: Attach files

Services (+ Add Service):

Service name	Product number	Attributes	Fee type	Price per unit	Selling price
Microsoft Organization tenant (Microsoft)	-	-	-	-	-
Microsoft 365 Business Basic (Microsoft)	AAA-10524	Monthly (Billing Type), 5 (Number of CSP licenses)	Monthly fee	4.32 \$	21.60 \$

Summary:

- Total (Monthly fee): 21
- Annual Contract Value: 259.20 \$

The interface includes a top navigation bar with links to Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. A user profile for Arturo Bejarano is visible in the top right corner. At the bottom left, there is a '+ NEW' button.

Quotation Tool - Usage

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

The screenshot displays the 'Edit quote' interface of the INTCOMEX Quotation Tool. The top navigation bar includes links for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user 'Arturo Bejarano' is logged in. The interface is divided into two main sections: 'Quote information' and 'Customer information'.

Quote information:

- 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 (selected) or Explore (all services)
- Marketplace:** Marketplace 1 (8)

Customer information:

- Customer:** TECWYA
- Contact person:** Wendy Rojas
- Email:** wendy.rojas@tecuya.com
- Employee amount:** (dropdown menu)
- Industry:** Choose industry (dropdown menu)
- Turnover (\$):** (dropdown menu)
- Budget (\$):** (dropdown menu)
- Attachments:** Attach files (button)

Services:

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 at the top right: Save draft, Finish creation. A '+ Add Service' button is located at the bottom right of the services table. A '+ NEW' button is at the bottom left.

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 QuotesCustomer Quotes

< Back to Quote list

Quote details (000246)

Export PDFExport XLSXModify Quote

Quote Information

Quote name

TECWYA S.A.C. - 10.05...

Status

Active

Quote owner

arturo.bejarano@int...

Offer valid until

5/31/2021

Currency

USD

External quote ID

0021-12448

Quote owner

5/10/2021

Open to CSP

Customer Information

Customer

TECWYA S.A.C.

Contact person

Wendy Rojas

Budget (\$)

Email

wendy.rojas@tecwya...

Employee amount

20

Industry

Manufacturing

Turnover (\$)

Services

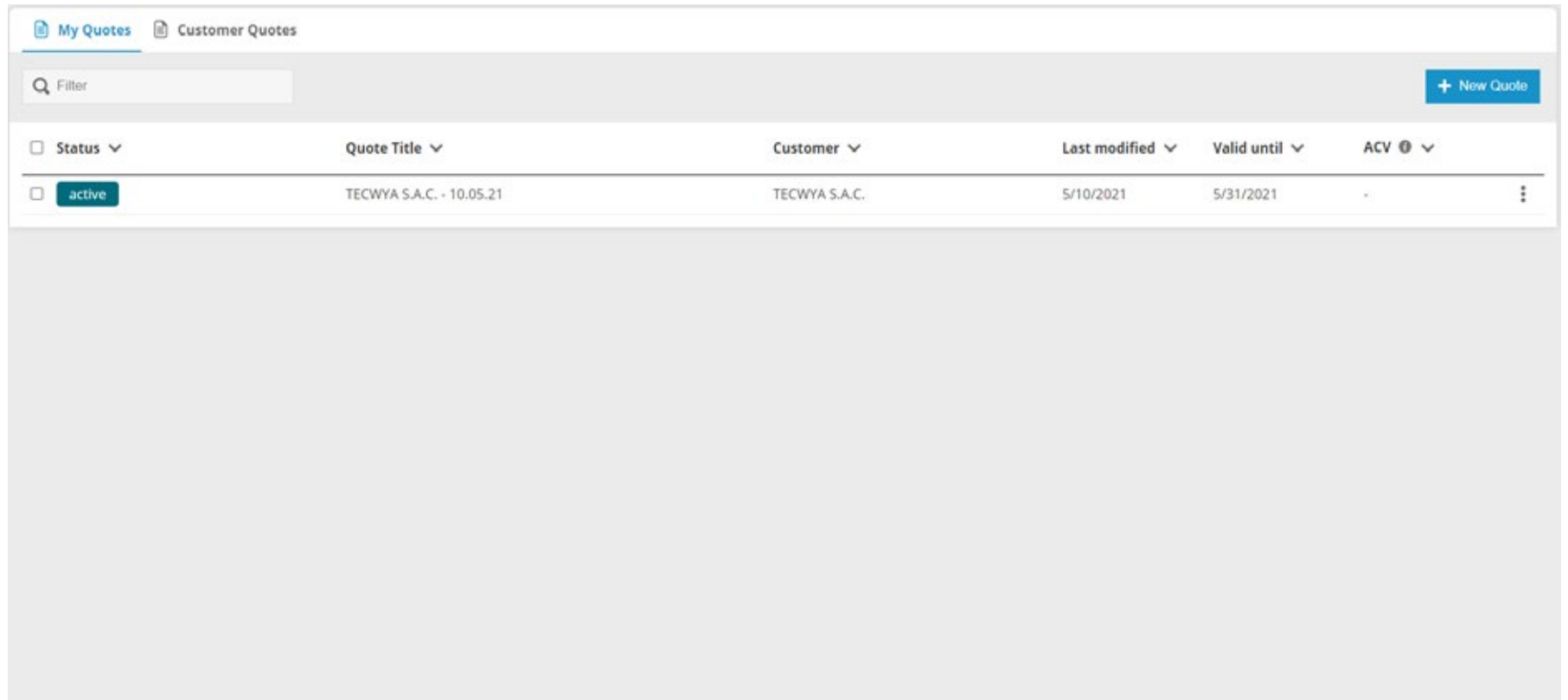
Service name	Product Number	Attributes	Fee Type	Price per unit	Selling price
 Microsoft 365 Business Basic (Microsoft)	AAA-10624	Annually prepaid (Billing Type), 5 (Number of CSP licenses)	Per 12 month(s)	4.32 \$	21.60 \$
 Microsoft Organization tenant (Microsoft)	-	-	-	-	-
Total (Pre-paid):					259.20 \$
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' section of a web application. At the top, there are two tabs: 'My Quotes' (active) and 'Customer Quotes'. Below the tabs is a search bar labeled 'Filter' and a '+ New Quote' button. The main area contains 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', valid until date '5/31/2021', and an ACV of '-'. A vertical ellipsis menu 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	-

