



Arturo Bejarano
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Operaciones Cloud

Quotation Tool

Funcionalidad

Quotation Tool - Usage

Ingresamos al portal
Intcomex Cloud
Platform y
seleccionamos en el
menu superior la
opción **Quatotion Tool**

The screenshot displays the Intcomex Cloud Quotation Tool interface. The top navigation bar includes 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.

The left sidebar shows the **COMPANY HIERARCHY** with a search bar and a list of companies, including Intcomex Bermuda and various resellers.

The main content area is titled **Intcomex Bermuda** and features a navigation menu with tabs: OVERVIEW (selected), SUPPORT, AVAILABLE SERVICES, BILLING, PROVISIONING, SECURITY, and AUDIT LOG.

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:

Language	Spanish
Marketplaces	Intcomex Costs BM Intcomex Costs

The **CONTACT DETAILS** section includes:

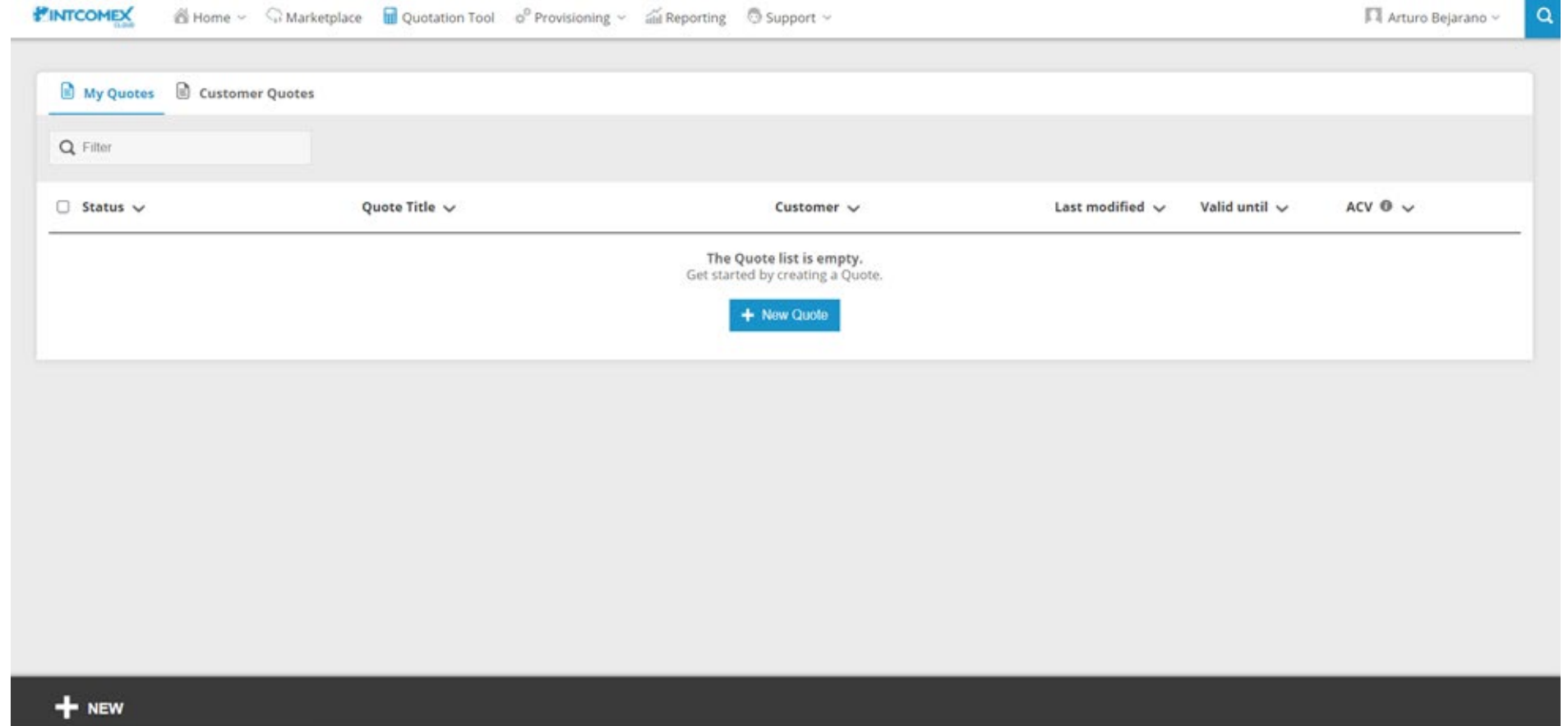
Address	3505 NW 107th Ave Doral FL FL 02 Bermuda
City	Doral
Country	Bermuda
Zip	33178
Email	aldo.barrios@intcomex.com
Contact phone	
Contact person	
Technical contact	Aldo Barrios
Technical Contact Email	aldo.barrios@intcomex.com

The **PAYMENT DETAILS** section includes:

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

Escogemos la opción **New Quote** para ingresar una nueva cotización



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' and 'Customer Quotes'. A search filter is present below the tabs. The main content area shows a table header with columns: Status, Quote Title, Customer, Last modified, Valid until, and ACV. The table is currently empty, with a message stating 'The Quote list is empty. Get started by creating a Quote.' and a prominent blue '+ New Quote' button. A '+ NEW' button is also visible in the bottom left corner of the interface.

Quotation Tool - Usage

Se muestra un formulario que completaremos de acuerdo a las indicaciones detalladas a continuación

The screenshot displays the 'Quote Creation' form in the INTCOMEX Quotation Tool. The interface includes a navigation bar with 'Home', 'Marketplace', 'Quotation Tool', 'Provisioning', 'Reporting', and 'Support'. The user 'Arturo Bejarano' is logged in. 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).
- 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 (\$)'. The 'Existing Customer' checkbox 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.

Buttons for 'Save as a draft' and 'Create Quote' are located at the top right of the form.

Quotation Tool - Usage

- ✓ Open to CSP (\$): Oportunidad que proviene del programa OPEN
- ✓ Quote name: Nombre de la cotización
- ✓ Quote owner: Usuario que realiza la cotización
- ✓ External quote ID: Correlativo asignado a la cotización
- ✓ Offer valid until: Fecha límite de la cotización
- ✓ Service source : Fuente de servicio

My Marketplace: Seleccionamos esta opción si tiene una lista de precios, en este caso el margen esta configurado de forma automática

Explore (all services): Seleccionamos para mostrarnos todos los productos disponibles, en este caso el margen debe ser configurado de forma manual.

Quotation Tool - Usage

- ✓ Existing Customer: Desmarcamos esta opción en caso no tengamos creado al cliente en ICP
- ✓ Customer: Nombre de la empresa del cliente
- ✓ Contact persona : Nombre de la persona de cliente
- ✓ Email: Correo electrónico del cliente
- ✓ Employee amount: Cantidad de empleados (Opcional)
- ✓ Industry: Tipo de industria perteneciente (Opcional)
- ✓ Iturnover (\$): Rotación
- ✓ Budget (\$): Presupuesto

Quotation Tool - Usage

Procedemos a agregar los servicios mediante la opción

+ Add Service

The screenshot displays the 'Quote creation' interface in the INTCOMEX Cloud system. The page is divided into two main sections: 'Quote information' and 'Customer information'. The 'Quote information' section includes fields for 'Quote name*' (TECWYA 10-05-21), 'Quote owner*' (arturo.bejrano@intcomex.be), 'External quote ID' (0021-12448), 'Currency*' (USD), 'Offer valid until' (31/10/2021), 'Service source' (My Marketplaces), and 'Marketplace' (Marketplace 1 (8)). The 'Customer information' section includes fields for 'Customer*' (Choose customer), 'Contact person*' (John Doo), 'Email*' (abc@xyz.com), 'Employee amount', 'Industry' (Choose industry), 'Turnover (\$)', 'Budget (\$)', and 'Attachments' (Attach files). A '+ Add Service' button is located at the bottom right of the form. Below the form, a table titled 'Services' is shown, which is currently empty. The table has columns for 'Service name', 'Product number', 'Attributes', 'Fee type', 'Price per unit', and 'Selling price'. A message below the table states: 'The service list is empty. Add a service to get started.' The top navigation bar includes the INTCOMEX logo and links for Home, Marketplace, Quotation Tool, Provisioning, Reporting, and Support. The user's name, Arturo Bejrano, is displayed in the top right corner.

Quote creation

Save as a draft Create quote

Quote information Open to CSP

Customer information Existing customer

Quote name*
TECWYA 10-05-21

Quote owner*
arturo.bejrano@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) x

Customer*
Choose customer

Contact person*
John Doo

Email*
abc@xyz.com

Employee amount

Industry
Choose industry

Turnover (\$)

Budget (\$)

Attachments
Attach files

+ Add Service

Service name	Product number	Attributes	Fee type	Price per unit	Selling price
The service list is empty. Add a service to get started.					

+ NEW

Quotation Tool - Usage

Seleccionamos los servicios que deseamos aprovisionar mediante una simple búsqueda rápida utilizando el buscador o utilizando los filtros predefinidos.

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 filter dropdowns: 'Categories', 'Vendors', and 'Tags', along with 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).

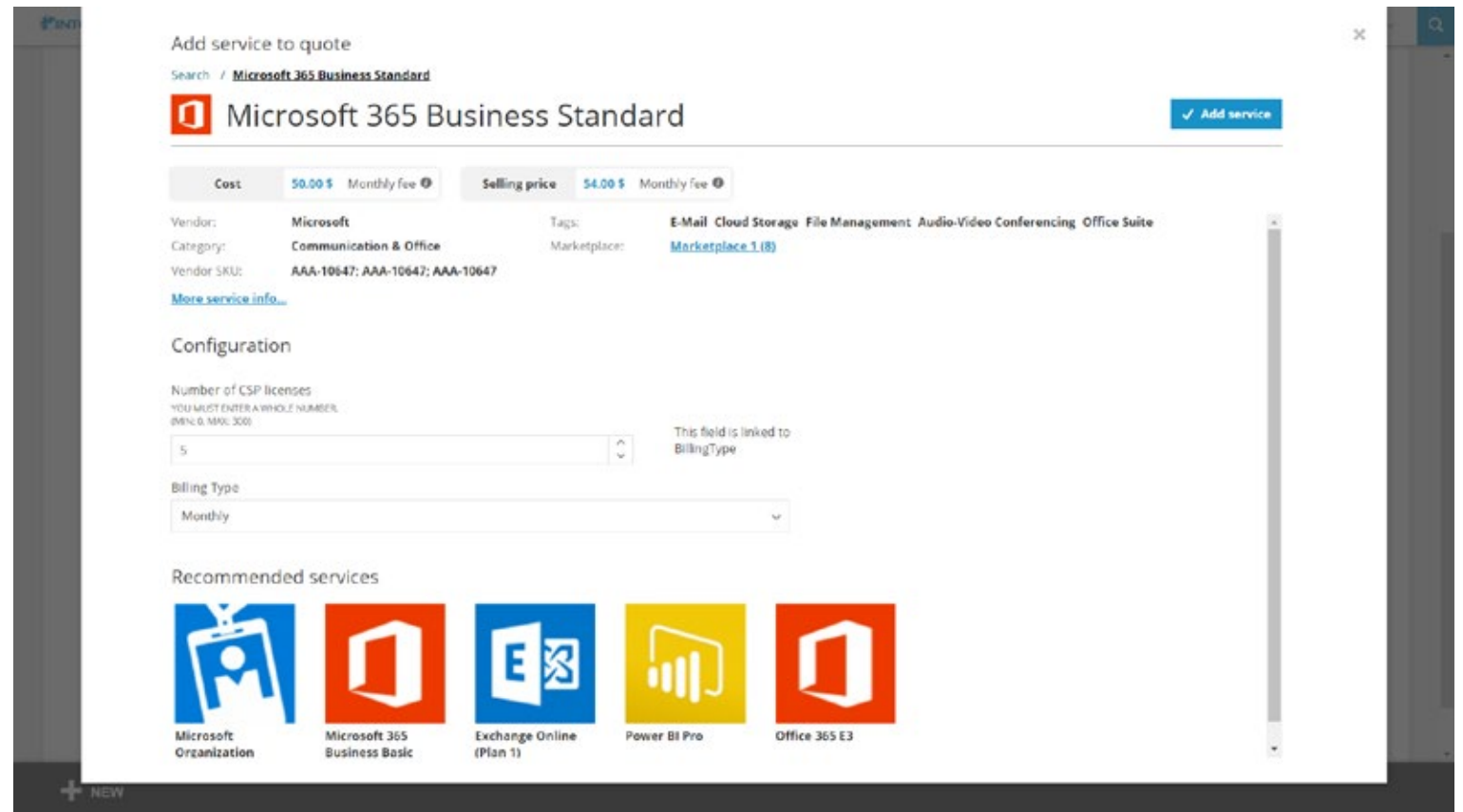
Quotation Tool - Usage

Luego, seleccionamos la cantidad de asientos y la recurrencia de la suscripción.

Monthly: Mensual

Annualy: Anual

Finalmente, hacemos clic en la opción **+ Add service**



The screenshot shows a web interface for adding a service to a quote. The main heading is "Add service to quote". Below it, there is a search bar containing "Microsoft 365 Business Standard" and a blue button labeled "+ Add service".

The service details are as follows:

- Cost:** 50.00 \$ Monthly fee
- Selling price:** 54.00 \$ Monthly fee
- Vendor:** Microsoft
- Category:** Communication & Office
- Vendor SKU:** AAA-10647; AAA-10647; AAA-10647
- Tags:** E-Mail Cloud Storage File Management Audio-Video Conferencing Office Suite
- Marketplace:** Marketplace 1 (8)

There is a link for "More service info...".

Configuration

Number of CSP licenses
YOU MUST ENTER A WHOLE NUMBER.
(MIN: 0, MAX: 300)

The input field contains the number "5". A note next to it says "This field is linked to BillingType".

Billing Type

The dropdown menu is set to "Monthly".

Recommended services

Five service icons are shown:

- Microsoft Organization
- Microsoft 365 Business Basic
- Exchange Online (Plan 1)
- Power BI Pro
- Office 365 E3

Quotation Tool - Usage

Solo en caso de elegir algún servicio Microsoft tendremos que agregar el servicio Microsoft Organization tenant escogiendo el botón **+ Add service**. Este servicio es gratuito por lo que no afectará el valor de la cotización.

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 content area is titled 'Services' and features a table with the following columns: Service name, Product Number, Attributes, Fee Type, Price per unit, and Selling price. The table contains one entry: Microsoft 365 Business Basic (Microsoft) with Product Number AAA-10624, Attributes Monthly (Billing Type), 1 (Number of CSP licenses), Fee Type Monthly Fee, Price per unit 4.32 \$, and Selling price 4.32 \$. Below the table, a message states 'Additional service(s) required' and lists 'Microsoft Organization tenant' as a required service. A search bar and '+ Add service' button are provided for this service. At the bottom, there are input fields for 'Number of CSP licenses' (set to 1) and 'Billing Type' (set to Monthly), along with 'Cancel Changes' and 'Save Service' buttons. The bottom right corner shows 'Total (Monthly Fee): 4.32 \$'.

Quotation Tool - Usage

En caso deseamos modificar el detalle de la suscripción a cotizar hacemos clic sobre los 3 puntos ubicado al lado derecho de cada linea. Luego, hacemos clic en la opción Edit. Para eliminar la linea hacemos clic en la opción Delete.

The screenshot displays the 'Edit quote' interface in the Intcomex Quotation Tool. 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 dropdown menu is open for the 'Microsoft 365 Business Basic' service, showing options for 'Delete' and 'Edit'.

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 \$

Quotation Tool - Usage

Una vez añadidos los servicios escogemos la opción

Finish creation para crear la

cotización. En caso quisiéramos

guardar la cotización como

borrador podemos hacer clic

en la opción **Save as a draft**

The screenshot displays the 'Edit quote' interface in the INTCOMEX Quotation Tool. The page 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@teciya.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.

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.

Quotation Tool - Usage

Finalmente, se muestra el detalle de nuestra cotización generada la cual se puede exportar en formato PDF o XLSX.

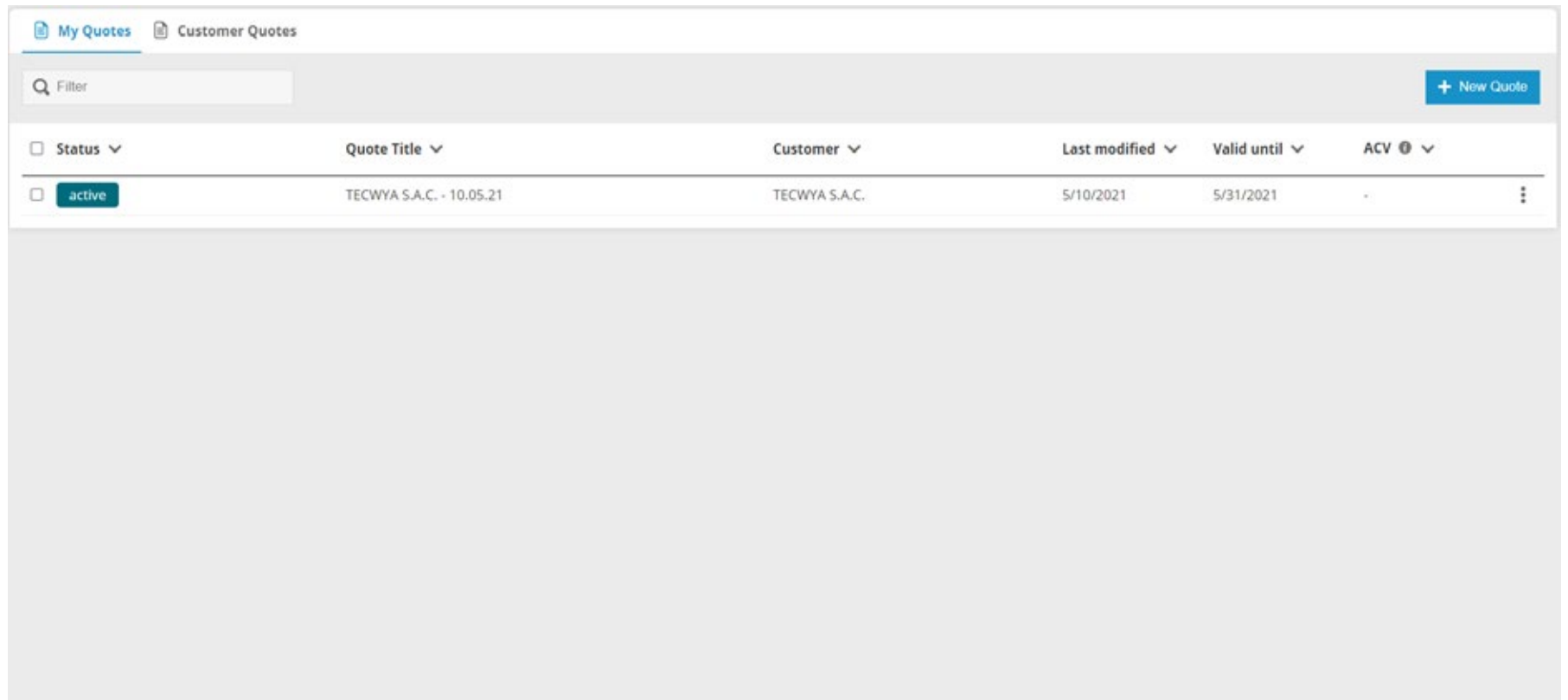
En caso de requerir corregir la cotización podemos hacer clic en la opción **Modify Quote**

The screenshot displays the 'Quote details' page for quote ID 000246. It features a navigation bar with 'My Quotes' and 'Customer Quotes' tabs. The main content is divided into three sections: 'Quote Information', 'Customer Information', and 'Services'. The 'Quote Information' section includes fields for Quote name, Status (Active), External quote ID, Quote owner, Offer valid until, and Currency (USD). The 'Customer Information' section includes Customer, Contact person, Budget (\$), Email, Employee amount, Industry, and Turnover (\$). The 'Services' section is a table with columns for Service name, Product Number, Attributes, Fee Type, Price per unit, and Selling price. A 'Modify Quote' button is located in the top right corner.

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

Para visualizar las cotizaciones registradas hacemos clic en el submenú **My Quotes**. Para visualizar el detalle de la cotización solo debemos hacer clic sobre la línea requerida.



The screenshot displays the 'My Quotes' section of a software 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 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'.

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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