

Implementations - How To Order Hardware and Software

01/02/2024 6:12 pm EST

*Updated as of 3/18/22 - all hardware purchases \$1K or more must go through our Procurement process by filling out this form: [Procurement Request Form \(office.com\)](#)

Below steps to be updated at a later date.

This guide steps through the process of ordering project supplies and licensing for customers. In general, we order hardware through Dell, software through Tech Data and Digis/miscellaneous supplies from NewEgg.

Contents

[Step 1: Check Customer has Paid in Full](#)

[Step 2: Project Manager Checks eQuote in CRM](#)

[Step 3: Email Sales Rep](#)

[Step 4: Download Microsoft Volume Licenses](#)

[Step 5: Order DIGIs From NewEgg](#)

[Next Process Link](#)

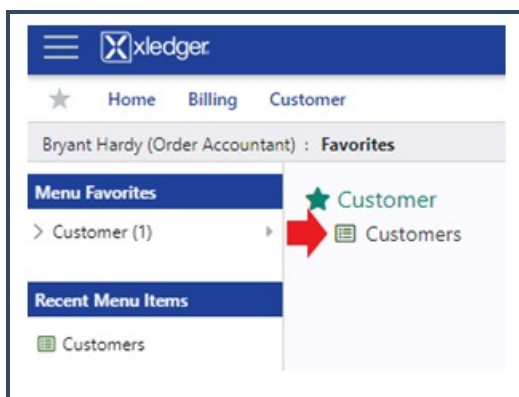
Step 1: Check Customer has Paid in Full

In this step, the project owner checks that the customer has paid all invoices in full. Full payment must be received before any supplies are ordered.

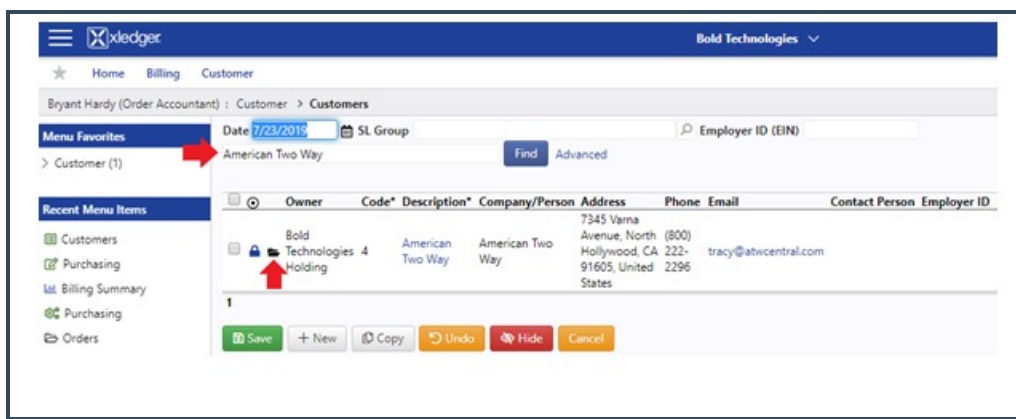
Sign-in to [XLedger](#) using paired device password.



Click 'Customers' to reveal advanced customer search



Search for the customer in the search bar, then select the folder icon next to their account in the results.



Within the Customer's subledger, scroll to the bottom of the page and click the 'Transactions' link.



Select the corresponding invoice.

Mid	Subledger*	Invoice #	Account*	TS	##	Per.#	Inv. Date	Due	Balance	Cur	Invoice	Amount	Remaining	R	Invoice
13532	American Two Way	19537	1210	BA	1456	7	7/8/2019	7/8/2019	15,774.42			-430.38			
13831	American Two Way	19832	1210	SO	285	7	7/1/2019	7/31/2019	15,774.42			7,665.88	7,665.88		
12782	American Two Way	18897	1210	BA	1248	6	6/10/2019	6/10/2019	15,774.42			-7,665.88			
13532	American Two Way	19537	1210	SO	251	6	6/1/2019	7/1/2019	15,774.42			430.38			
13106	American Two Way	19272	1210	SO	235	5	5/30/2019	6/29/2019	15,774.42			-3,495.00			
11907	American Two Way	18186	1210	BA	1143	5	5/24/2019	5/24/2019	15,774.42			-438.43			
12373	American Two Way	18536	1210	BA	1053	5	5/14/2019	5/14/2019	15,774.42			-432.31			
12858	American Two Way	18935	1210	BA	1053	5	5/14/2019	5/14/2019	15,774.42			-445.00			
12860	American Two Way	19231	1210	SO	213	5	5/7/2019	5/22/2019	15,774.42			-578.00			
13106	American Two Way	19176	1210	SO	206	5	5/1/2019	5/31/2019	15,774.42			3,495.00			
12860	American Two Way	18937	1210	SO	184	4	4/22/2019	5/22/2019	15,774.42			578.00			
12858	American Two Way	18935	1210	SO	184	4	4/17/2019	5/17/2019	15,774.42			445.00			
12782	American Two Way	18897	1210	SO	168	4	4/1/2019	5/1/2019	15,774.42			7,665.88			
12373	American Two Way	18536	1210	SO	121	3	3/5/2019	4/4/2019	15,774.42			432.31			

Verify that the invoice has been approved and paid.

- eQuote number
- Quote Date and Quote Expiration Date
- Quote total cost
- Sales Rep Information
- Quoted items



A quote for your consideration!

Based on your business needs, we put the following quote together to help with your purchase decision. Please review your quote details below, then contact your sales rep when you're ready to place your order.

Total: \$6,293.84

Quote number:	Quote date:	Quote expiration:	Solution ID:	Deal ID:
3000033310542.1	Feb. 7, 2019	Mar. 9, 2019	10634751	15260561
Company name:	Customer number:	Phone:		
BOLD TECHNOLOGIES	44889252	(719) 358-4722		
Sales rep information:	Billing Information:			
Matt Miller	BOLD TECHNOLOGIES			
Matt_Miller1@Dell.com	421 WINDCHIME PL			
(800) 456-3355	COLORADO SPRINGS			
Ext: 5132184	CO 80919-1984			
	US			
	(719) 358-4722			

SKU	Description	Qty	Unit Price	Subtotal
	PowerEdge R540 - [AMER_R540_12425]	1	\$5,881.00	\$5,881.00
	Estimated delivery date: Feb. 21, 2019			
210-ALZH	PowerEdge R540 Server	1	-	-
384-BBTH	PowerEdge R540 Motherboard	1	-	-
461-AADZ	No Trusted Platform Module	1	-	-
321-BCWW	3.5" Chassis with up to 8 Hot Plug Hard Drives	1	-	-
405-AAOM	Internal PERC	1	-	-
340-BSID	PowerEdge R540 Shipping	1	-	-
481-BBDQ	PowerEdge R540 Shipping Material	1	-	-
338-BLLX	Intel Xeon Gold 5122 3.6G, 4C/8T, 10.4GT/s , 16.5M Cache, Turbo, HT (105W) DDR4-2666	1	-	-
374-BBBX	No Additional Processor	1	-	-
330-BBIS	1x16 FH, 3xLP, 1CPU	1	-	-
555-BBNG	Thank You for Choosing Dell	1	-	-
370-ADHU	2666MT/s RDIMMs	1	-	-
370-AAIP	Performance Optimized	1	-	-
780-BCDN	RAID 1	1	-	-

Step 3: Email Sales Rep

Send email confirmation of the order to the Sales Rep listed on the quote. The email should include the following information:

1. Correct shipping address
2. *Purchase Order #

3. An attached copy of the quote
4. A request for tracking information

*Purchase Order # is a combination of the customer account # and the last 4 digits of the sales proposal, separated by a dash (example: PO# 004 – M387)

Good morning Matt,

I would like to order the (3) attached quotes.

Bold Group PO #004-T8L1 for these quotes.

Shipping address:

ATW (American Two Way)

Attn: Verny Grajeda

7345 Varna Ave

North Hollywood, CA 91605

Please provide me with tracking information when available.

Best Regards,

Bryant

Step 4: Download Microsoft Volume Licenses

In this step an approved Implementation Technician will download all necessary Microsoft software volume licensing from the [Microsoft Volume Licensing Service Center](#).

Start by signing into the MS Volume Licensing Service Center using your work email account.



Select 'Downloads and Keys', then download all necessary software components.

Microsoft Volume Licensing Service Center

Home Licenses Downloads and Keys Software Assurance Subscriptions Administration Help

Downloads and Keys

Export all keys: CSV 1 - 16 of 64 items

Filter

☒ All Products (64)
☐ Servers (64)

Product	Description	Download	Key
SQL Server 2012 Standard Edition – Per Core	Description	Download	Key
SQL Server 2012 Standard Edition – Server/CAL	Description	Download	Key
SQL Server 2012 Standard Edition Service Pack 3 – Per Core	Description	Download	Key
SQL Server 2012 Standard Edition Service Pack 3 – Server/CAL	Description	Download	Key
SQL Server 2012 Standard Edition Service Pack 4 – Per Core	Description	Download	Key
SQL Server 2012 Standard Edition Service Pack 4 – Server/CAL	Description	Download	Key
SQL Server 2012 Standard Edition SP1 – Per Core	Description	Download	Key
SQL Server 2012 Standard Edition SP1 – Server/CAL	Description	Download	Key
SQL Server 2012 Standard Edition with SP1 – Per Core	Description	Download	Key
SQL Server 2012 Standard Edition with SP1 – Server/CAL	Description	Download	Key
SQL Server 2012 Standard Edition with SP2 – Per Core	Description	Download	Key
SQL Server 2012 Standard Edition with SP2 – Server/CAL	Description	Download	Key

Step 5: Order DIGIs

Step 1: Receive Log in for CDW please see Direct of Implementations for this log in

Step 2: Search for the product in the search bar, verify it matches the sales order and the total is LESS than what is listed on the quote

Step 3: Add to Cart and Proceed to check out

Step 4: Fill out the Shipping information with the customers information. (See screen shot below with example)

Be sure to verify the customers address



CHECKOUT: SHIPPING INFORMATION

M

1 SHIPPING ADDRESS

☒ New Shipping Address

All fields are required unless indicated as optional

First Name

Jose

Last Name

Flores

Company Name (optional)

Ysleta ISD

Address Line 1

9600 Sims Dr.

[Add Address Line 2](#)

City

El Paso

State

TX-Texas

Zip Code

79925

[Add Zip Ext](#)

Phone

(915) 434-0194

[Add Ext](#)

☐ Store for future orders

Step 5: Fill out Recipient Contact Information

Attention/Name = Customer Name

Email Address = email address of BoldGroup employee

Do not put the customer's email address in this field as it will send them the order total.

Recipient Contact Information

Attention/Name (optional)

Michela Schultz

Email Address (optional)

michela.schultz@boldgroup.com

[Continue](#)

Step 6: Select Shipping Method

Select 2-5 business days option

2 SHIPPING METHOD

Items shipped by CDW Partner:

This order contains one or more items that will ship from a CDW partner. Estimated delivery date may vary.

[View Affected Items](#)

Items shipped by CDW:

Choose Your Delivery Option

2-5 business days

\$13.61

Bill to Your Company's Shipping Account

New Shipping Account

If your order contains configurations or services, please note that there will be a delay as the products will need to be serviced by our engineers and go through Quality Control Verification. If you have questions, please contact your account manager or call at 800.808.4239.

Continue

Step 7: Payment Terms

PO Number will always be 1324649 add to the PO number and click review your order

Billing Address

Bold Group, Attn: Accts Payable (# 13246491)

3601 Walnut St Ste 400

Denver, CO 80205-4098

719-593-2829

Payment Method

Net Terms

If you are not approved for Verbal PO, a purchase order is required for your order to be processed.

P.O. Number/Description

13246491

Cost Center Code (optional)

Add Customer Notes (optional)

Notes will appear on invoice(s) for your reference only and will not be read by your account manager.

CDW is not responsible for comments entered in this field.

New Credit/Debit Card

Request a Lease

Provide payment information over the phone

Review Your Order

Step 8: Review the order and ensure that all the information matches and looks correct and the shipping address is correct

Step 9: You will receive the following email after the order has been placed



THANK YOU FOR YOUR ORDER

[Email](#)[Print](#)[Continue Shopping](#)

Order Number: 1C4YQZR

Order by: Jose Flores

Date: 5/20/2021 9:23:56 AM

Confirmation Email Sent to: michela.schultz@boldgroup.com

Billed from: CDW Government Inc., 230 N. Milwaukee Ave, Vernon Hills, IL - 60061 (800) 594-4239

SHIPPING ADDRESS

Ysleta ISD

Name/Attention: Jose Flores

9600 Sims Dr.

El Paso, TX 79925

SHIPPING METHOD

Drop Ship Ground

2-5 business days \$13.61

BILLING & PAYMENT

Billing Address

Bold Group, Attn: Accts Payable (a 13246491)

3601 Walnut St Ste 400

Denver, CO 80205-4098

Payment Method

NET 30-RESELLERS

If you have not been approved verbal P.O., a purchase order must be sent to your account manager for your order to be processed. [View Your Account Team](#)

P.O. Number/Description 13246491

Next Process Link

Links for the next Implementation Process per Project type can be found below:

For Manitou Standard implementation follow the [link](#)