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.

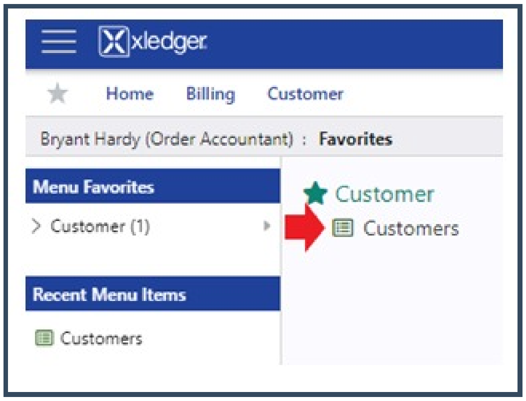
Contents

Step 1: Check Customer has Paid in Full

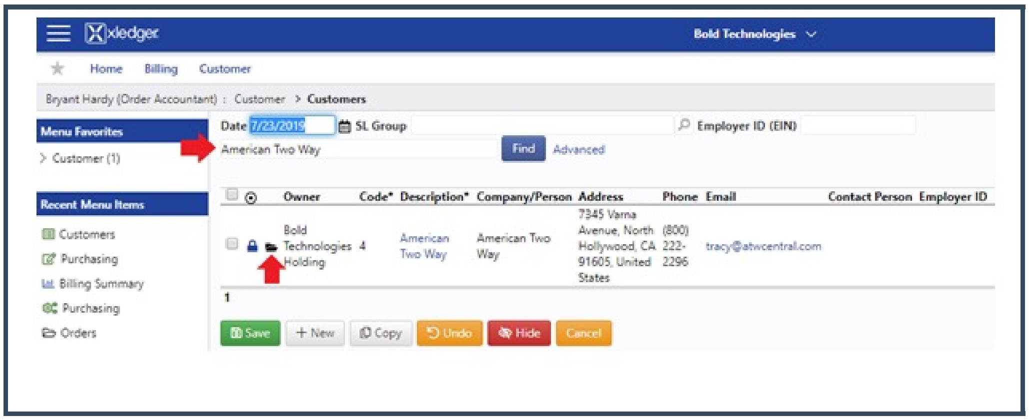
In this step, the project owner checks that the customer has paid all invoices in full. Full payment must be received before any supplies are ordered.

Sign-in to XLedger using paired device password.

Click ‘Customers’ to reveal advanced customer search

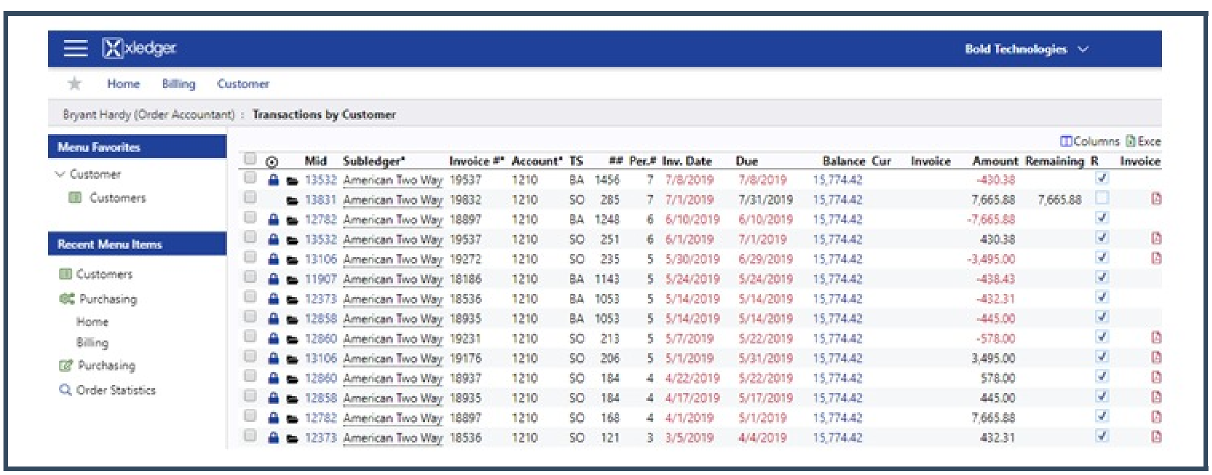


Search for the customer in the search bar, then select the folder icon next to their account in the results.

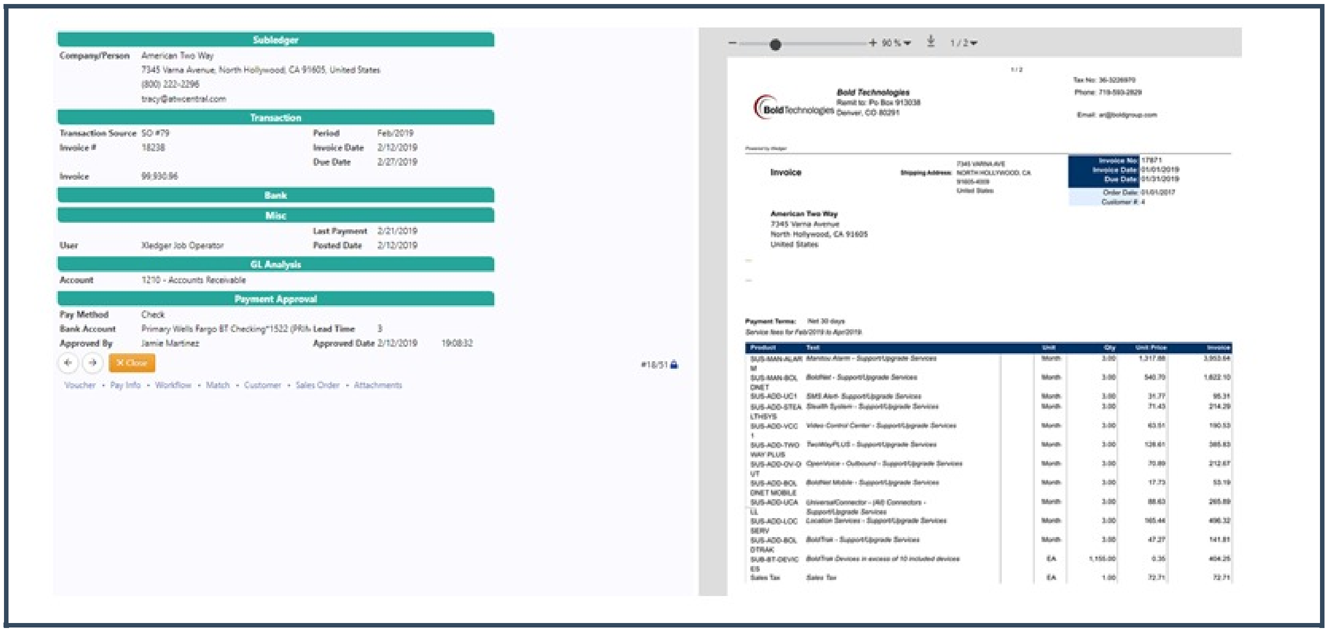


Within the Customer's subledger, scroll to the bottom of the page and click the 'Transactions' link.

Select the corresponding invoice.



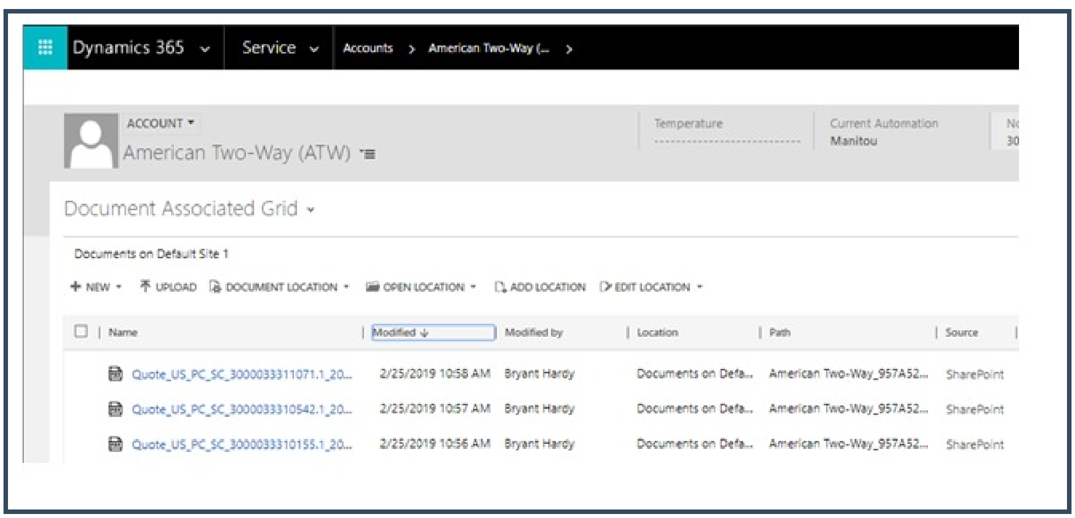
Verify that the invoice has been approved and paid.



* If you do not have access to XLedger contact the Accounting Department

Step 2: Project Manager Checks eQuote in CRM

At the account level, navigate to customer documents. Within documents verify that applicable eQuotes are available and complete.



Within each quote, verify the following information:

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

DELL

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:
Matt Miller
Matt_Miller1@Dell.com
(800) 456-3355
Ext: 5132184

Billing Information:
BOLD TECHNOLOGIES
421 WINDCHIME PL
COLORADO SPRINGS
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-ADNU	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:

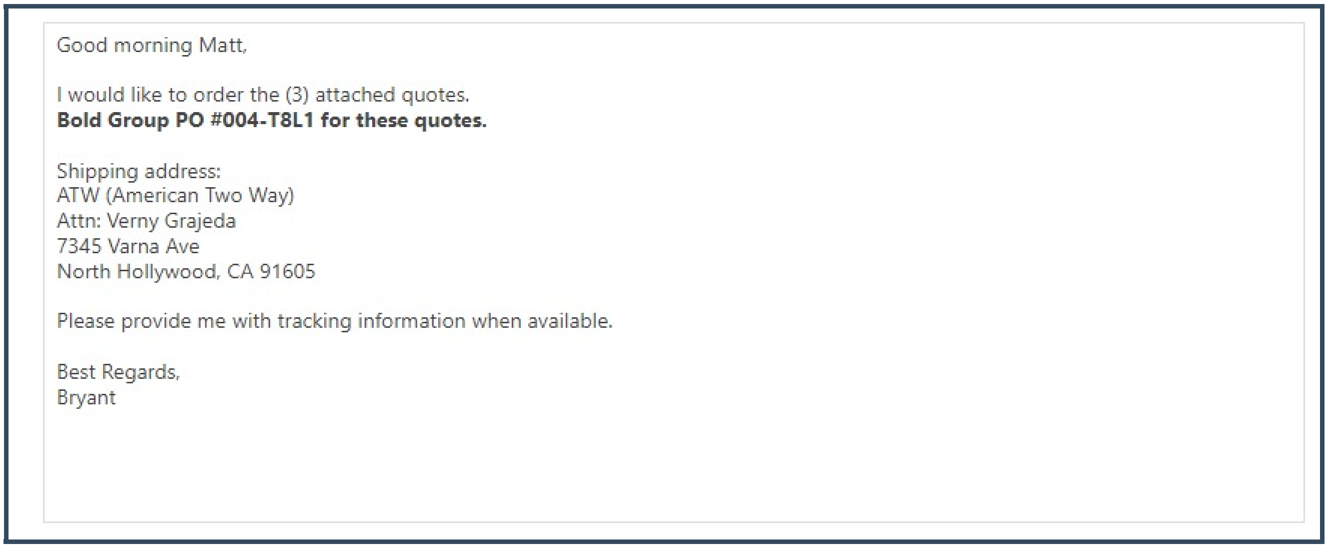
1. Correct shipping address

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.

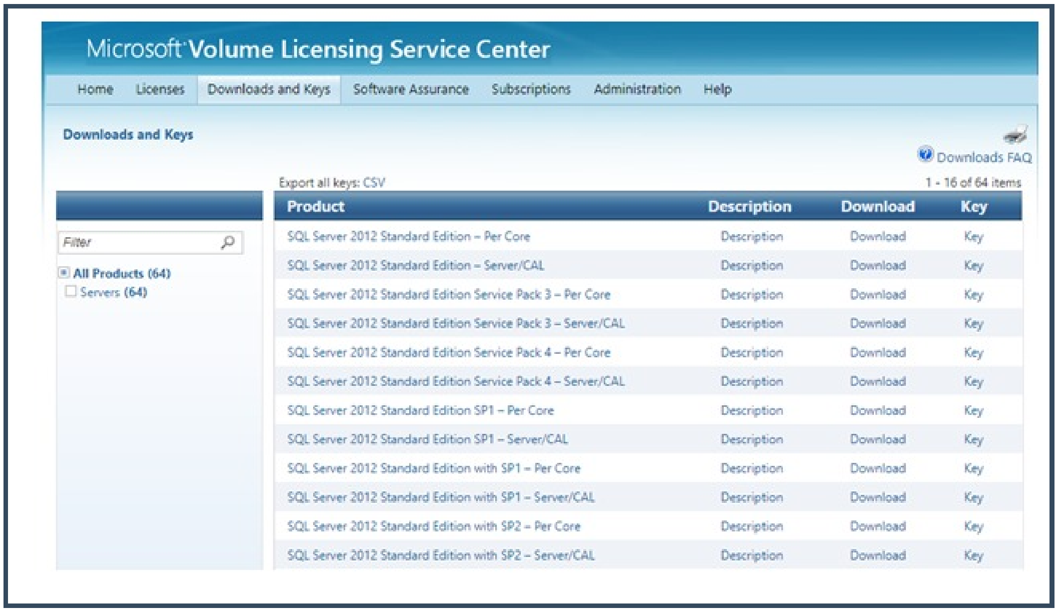
Best Regards,
Bryant

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.



Step 5: Order DIGIs

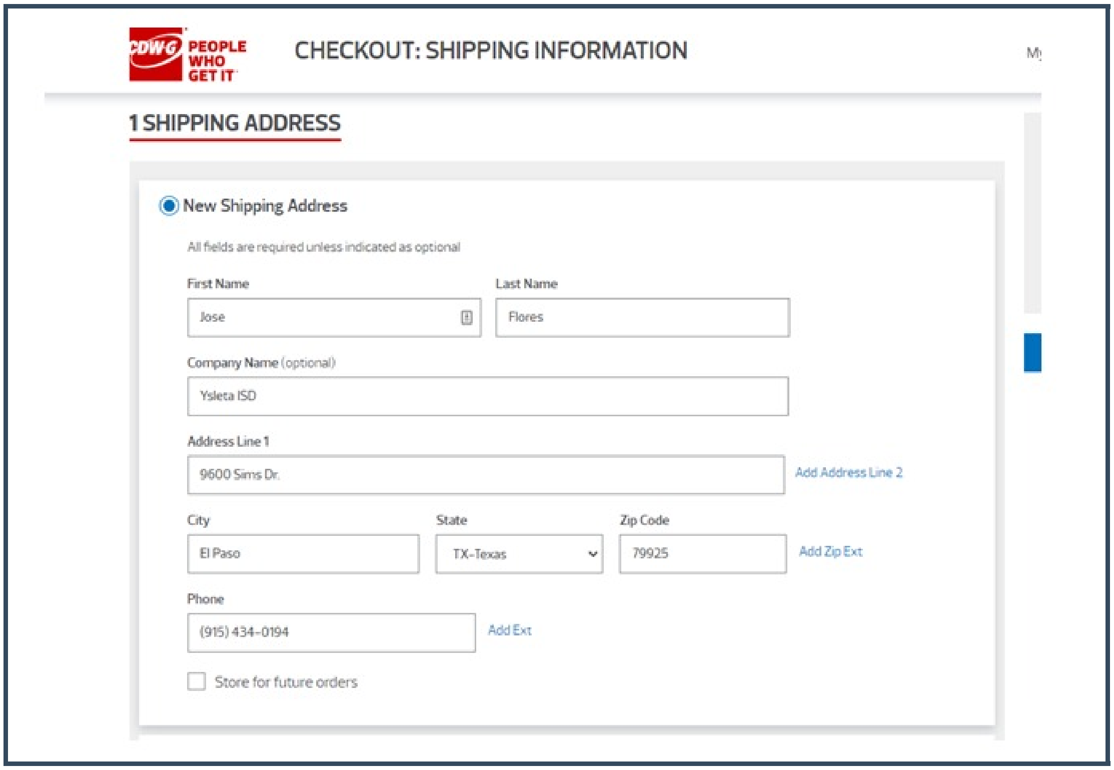
Step 1: Receive Log in for CDW please see Direct of Implementations for this log in

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 Proceede 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



Step 5: Fill out Recipient Contact Information

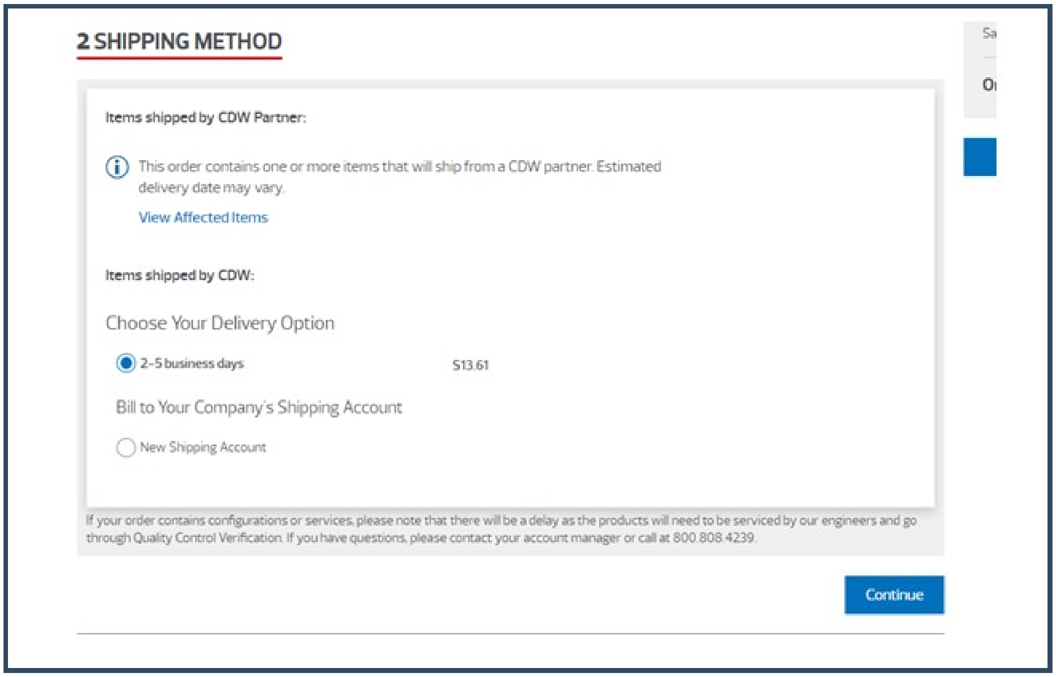
Attention/Name = Customer Name

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.

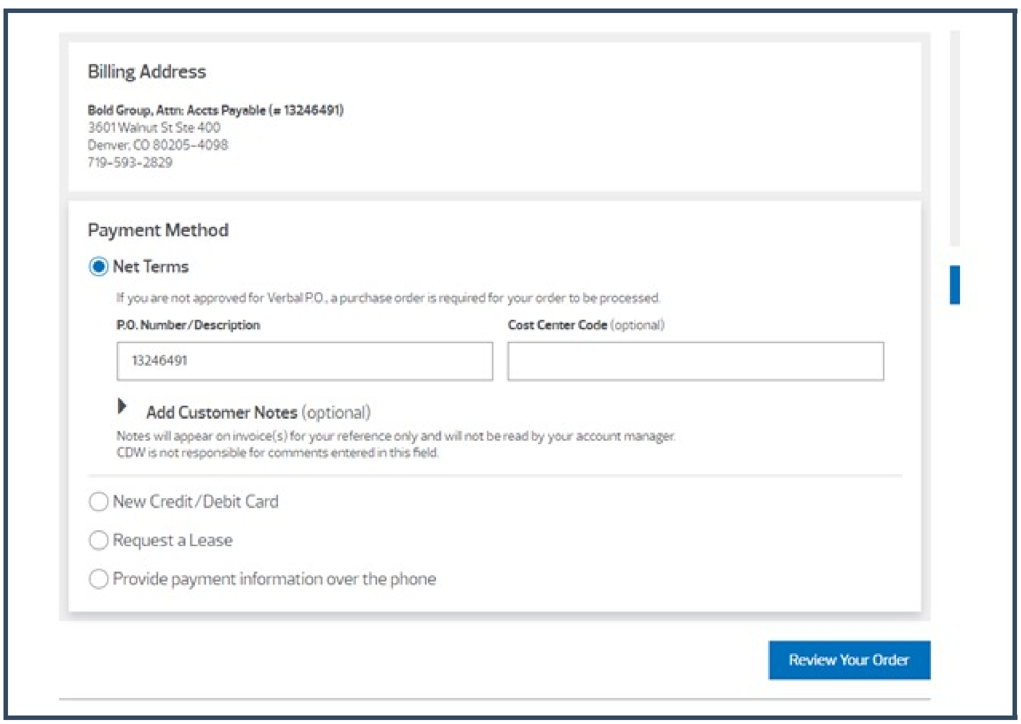
Step 6: Select Shipping Method

Select 2-5 business days option



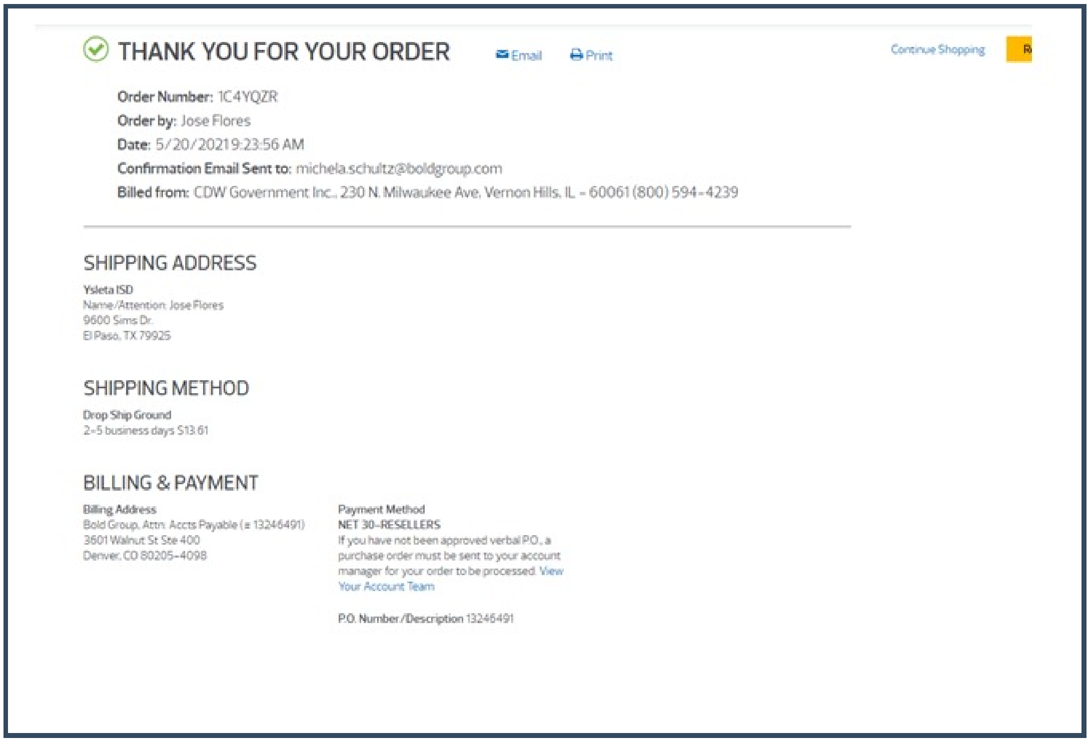
Step 7: Payment Terms

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



Step 8: Reveiw 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



Next Process Link

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

For Manitou Standard implementation follow the link