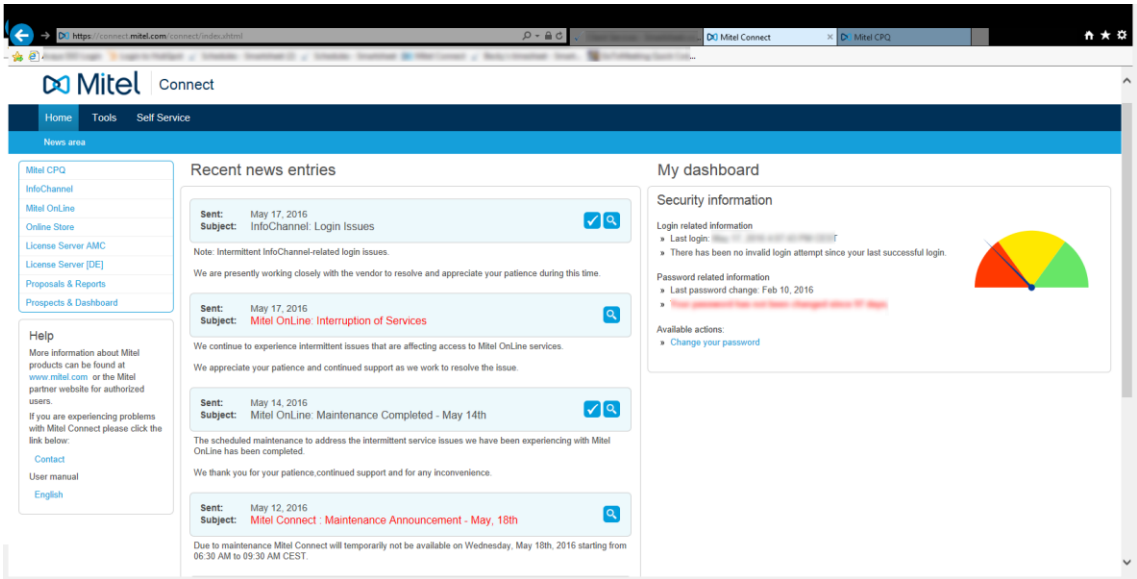
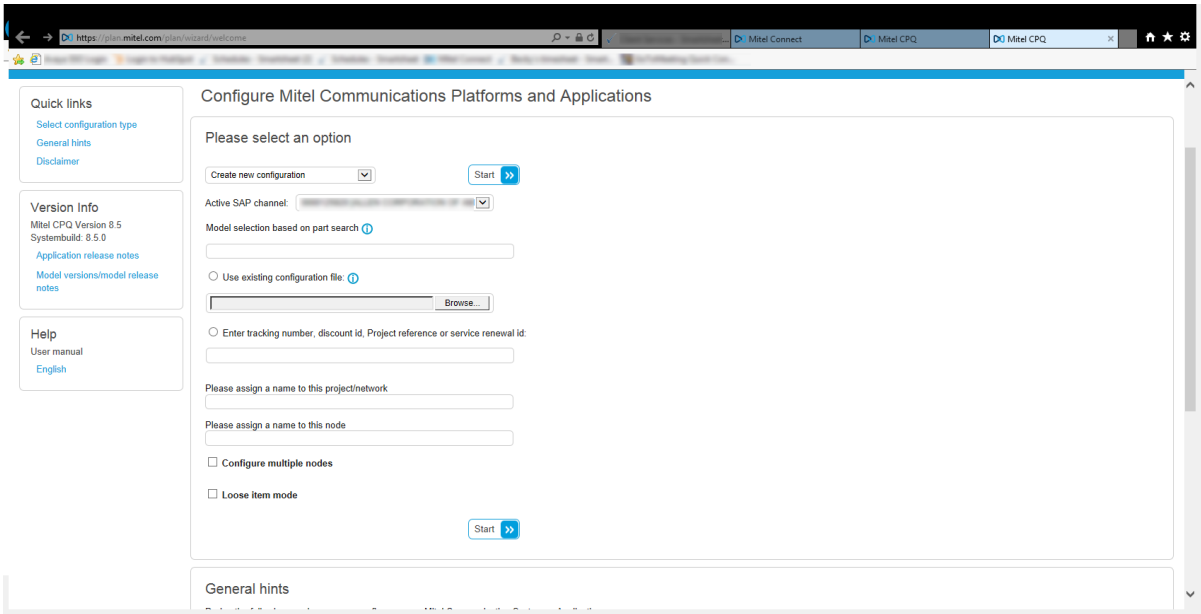
Generating a Mitel CPQ Quote

* Please reach out to your Mitel CPQ Tool Administrator, who will in turn set the permission for users to be able to create a margin report.*

1. Login to Mitel Connect

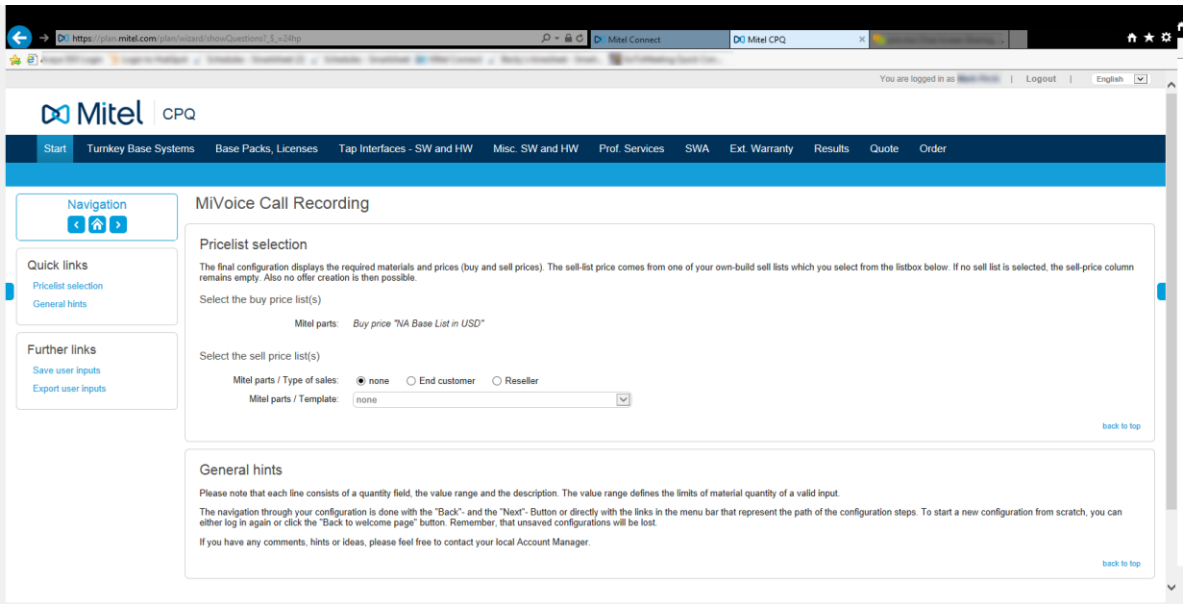


2. Click Mitel CPQ



3. Select Create new configuration (select option from pull down list)

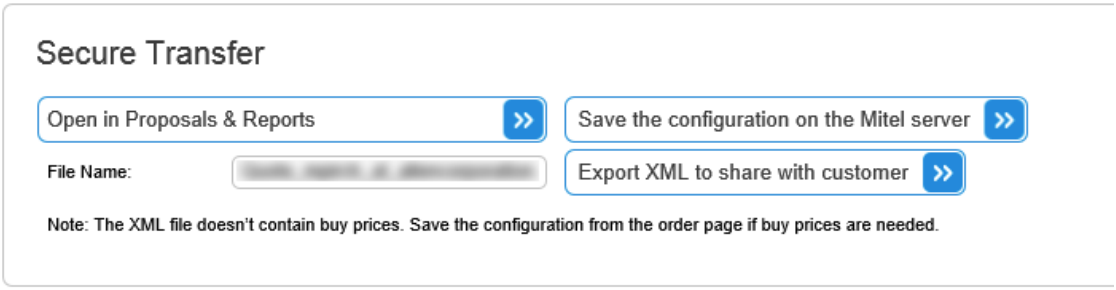
4. **Click Start**



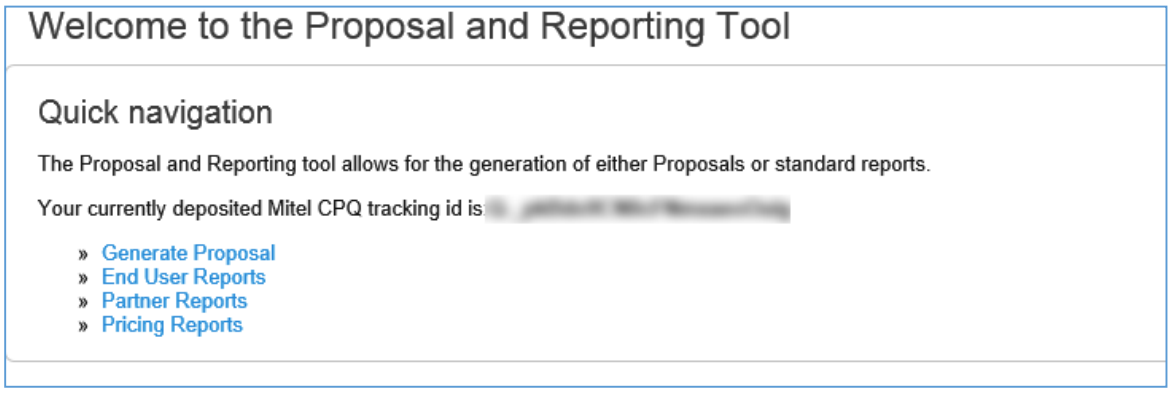
5. **Move through the top menu items, choosing your options, parts**

6. **Fill out all your information, and then select Quote option (last tab)**

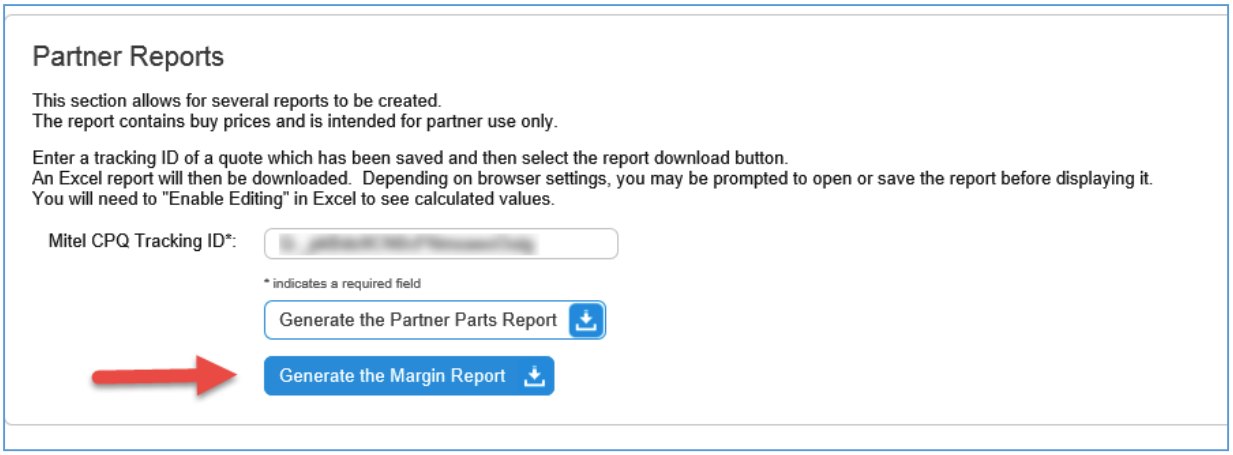
7. **Go to Secure Transfer section**



8. **Select Open in Proposals & Reports**



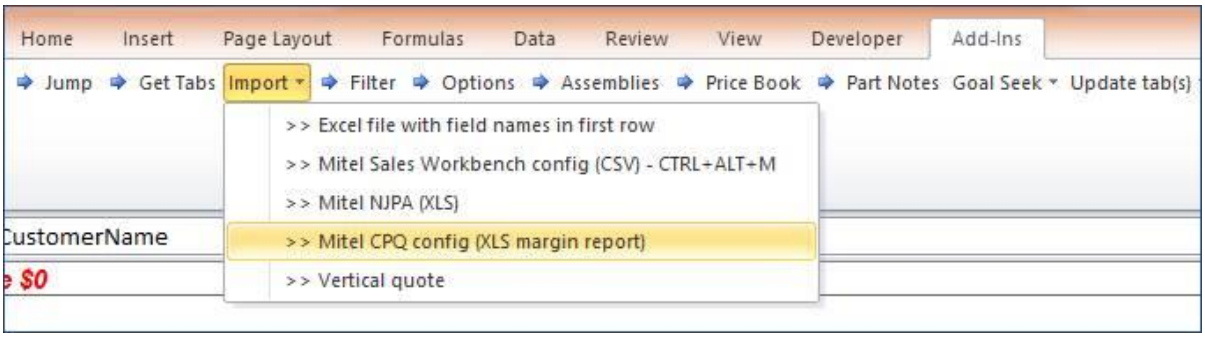
9. Select Partner Reports



10. Select Generate the Margin Report

After your margin report is generated and saved to disk you are ready to import it to SDA.

- **Open SDA**
- **Select Add-Ins on the menu pull**
- **Select Import and choose Mitel CPQ config (XLS margin report)**



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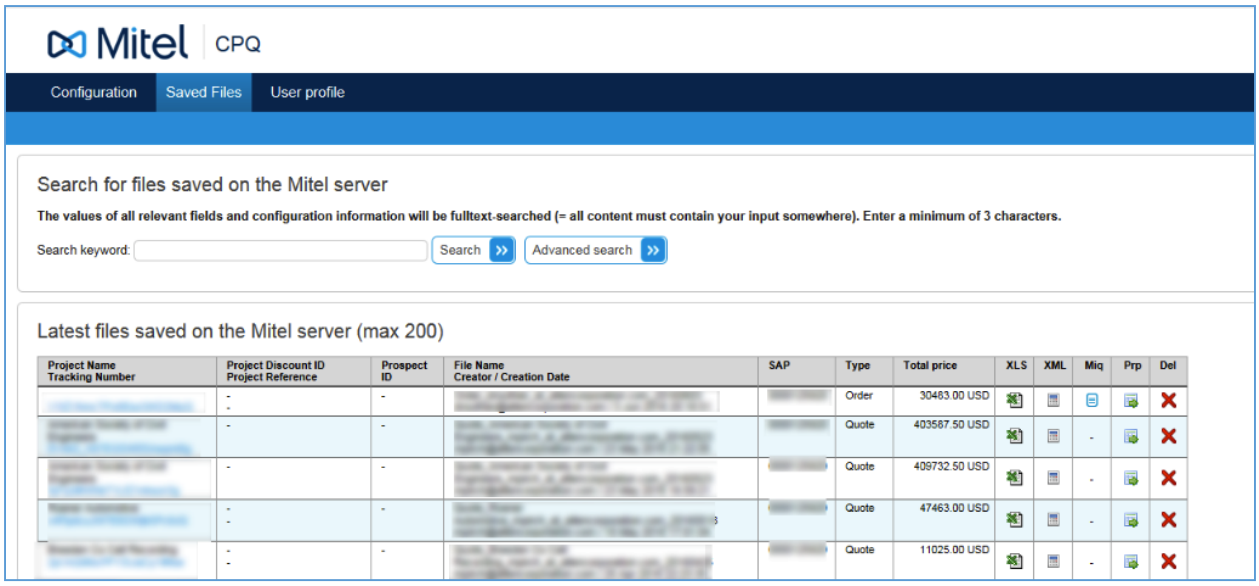
If these steps do not work for you, or if the menus on your system look different, please try this method...

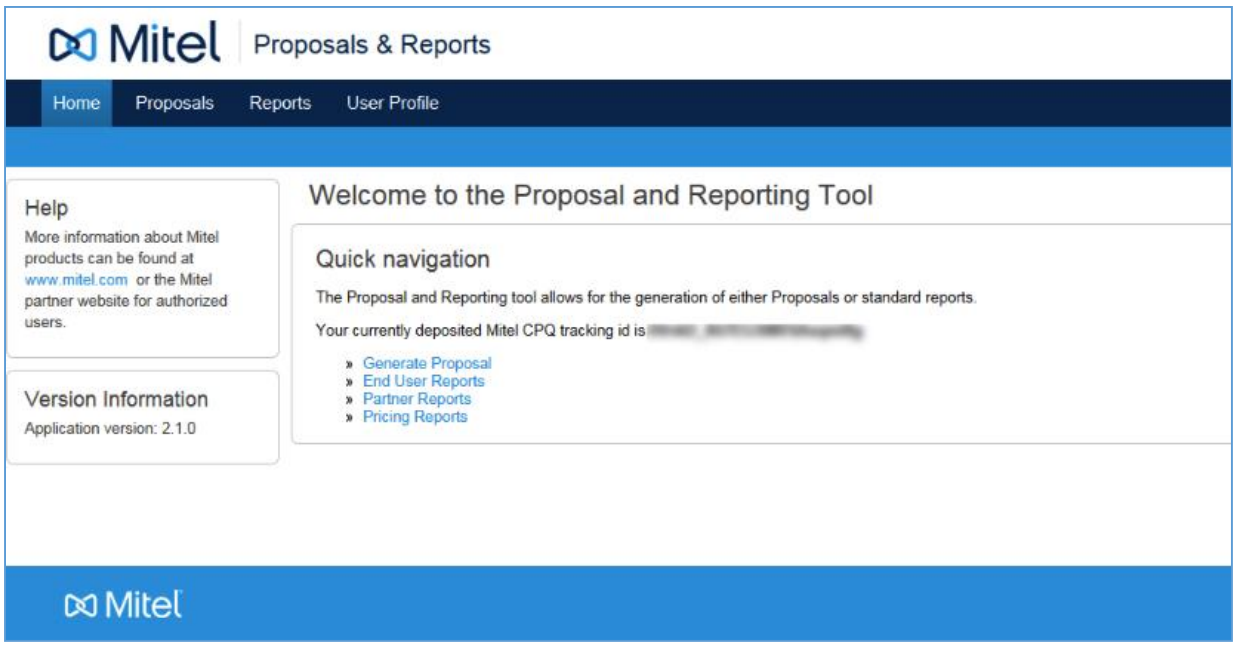
1. Save the configurator files on the Mitel Server and then bring up the Saved files in the CPQ tool.

2. You can get to here *after* you configure the system. However, if you do not save the file, you'll need to reconfigure the system by starting from scratch.

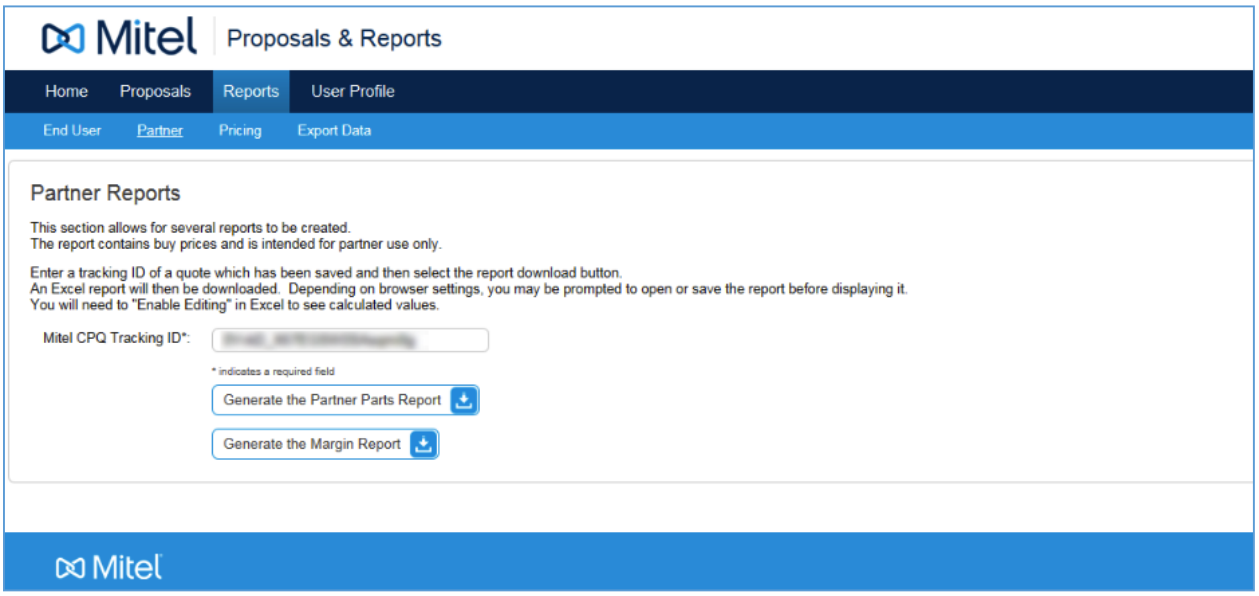


3. In the Saved Files, go to the **<u>Prp Column</u>** to get to the Proposals and reports directly.

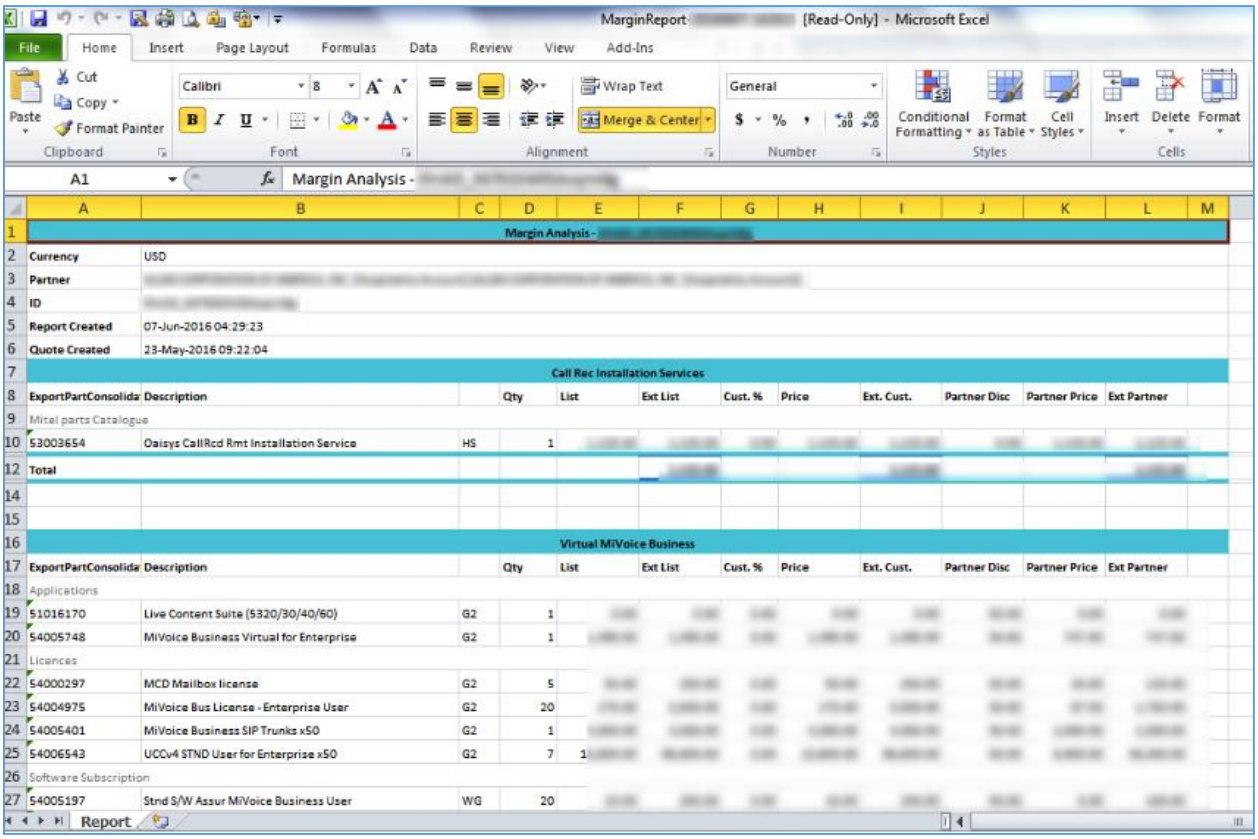
4. You will notice it has the Saved configuration ID.



5. Select Partner Reports



6. Generate the Margin Report



7. Save the Margin Report to your PC to import into SDA.