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

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Home Tools Self Ser	ice		
News area			
Mitel CPQ	Recent news entries	My dashboard	
Mind CPQ InfoChannel Mind OnLine Online Store License Server (MC License Server (DE) Prosposals & Reports Prosposals & Reports Prosposals & Reports Help More information about Minel moducts can be found at	Sent: May 17, 2016 Subject: InfoChannel: Login Issues Note: Intermittent InfoChannel: - Login Issues. We are presently working closely with the vendor to resolve and appreciate your patience during this time. Sent: May 17, 2016 Subject: May 17, 2016 Subject: May 17, 2016 Subject: May 17, 2016 Subject: May 17, 2016 We continue to experience Interruption of Services Image: Continue to experience interruption of services. We appreciate your patience and continued support as we work to resolve the issue. Image: Continue to experience interruption of support as we work to resolve the issue.	Security information Login related information Last login: There has been no invalid login attempt since your last successful login. Assumed related information Last password change: Feb 10, 2016 Available actions: Change your password	
partner website for authorized users. If you are experiencing problems with Miel Connect please click the link below: Contact User manual English	Sent: May 14, 2016 Subject: Mitel OnLine: Maintenance Completed - May 14th The scheduld maintenance to address the intermittent service issues we have been experiencing with Max OnLine has been completed. We thank you for your patience, continued support and for any inconvenience.		
	Subject: Miel Connect : Maintenance Announcement - May, 18th Due to maintenance Mitel Connect will temporarily not be available on Wednesday, May 18th, 2016 starting 06:30 Alt to 93:30 Alt CEST.	C	

2. Click Mitel CPQ

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Configure Mitel Communications Platforms and Applications
Please select an option
Create new configuration Start >>
Active SAP channel:
Model selection based on part search ()
Browse
O Enter tracking number, discount id, Project reference or service renewal id:
Please assign a name to this project/network
Please assign a name to this node
Configure multiple nodes
Loose item mode
Stat
General hints

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

4. Click Start

https://plan.mitel.com/p	lan/wizard/showQuestions?_\$_=24hp	P → 🗎 C D Mitel Connect	DO Mitel CPQ	×	n 🛪
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Navigation	MiVoice Call Recording				
vick links vicelist selection General hints	Pricelist selection The final configuration displays the required materials and prior remains empty. Also no offer creation is then possible. Select the buy price list(s) Mile parts: Buy price 7VA Base List	es (buy and sell prices). The sell-list price comes from one of tin USD*	' your own-build sell lists which you	a select from the listbox below. If no sell list is sele	cted, the sell-price column
urther links Save user inputs Export user inputs	Select the sell price list(s) Mitel parts / Type of sales:	stomer 🔿 Reseller			back to top
	General hints Please note that each line consists of a quantity field, the value	e range and the description. The value range defines the limit	s of material quantity of a valid inp	ut.	
	The navigation through your configuration is done with the "Ba either log in again or click the "Back to welcome page" button.	ck*- and the "Next"- Button or directly with the links in the me Remember, that unsaved configurations will be lost.	nu bar that represent the path of ti	he configuration steps. To start a new configuration	n from scratch, you can
	It you have any comments hints or ideas, please feel free to c				

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

Wel	come to the Proposal and Reporting Tool
Quio	ck navigation
The P	roposal and Reporting tool allows for the generation of either Proposals or standard reports.
Your o	currently deposited Mitel CPQ tracking id is
»	Generate Proposal End User Reports
» »	Partner Reports Pricing 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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	 >> Excel file with field names in first row > Mitel Sales Workbench config (CSV) - CTRL+ALT+M > Mitel NJPA (XLS) 	
CustomerName	>> Mitel CPQ config (XLS margin report)	
\$0	>> Vertical quote	

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.

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Configuration Sav	ved Files User profile										
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- 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

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Home	Proposals	Reports	User Profile
End User	<u>Partner</u>	Pricing	Export Data
Partner I This section : The report co Enter a track An Excel rep You will need Mitel CPQ	Reports allows for sever- intains buy price ng ID of a quot of a quot rt will then be of to "Enable Edit Tracking ID":	al reports to b is and is inter e which has b lownloaded, ing° in Excel * indicetes a rec Generate Generate	be created. Inded for partner use only. been saved and then select the report download button. Depending on browser settings, you may be prompted to open or save the report before displaying it. to see calculated values. suired field the Partner Parts Report
M	litel		

6. Generate the Margin Report

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