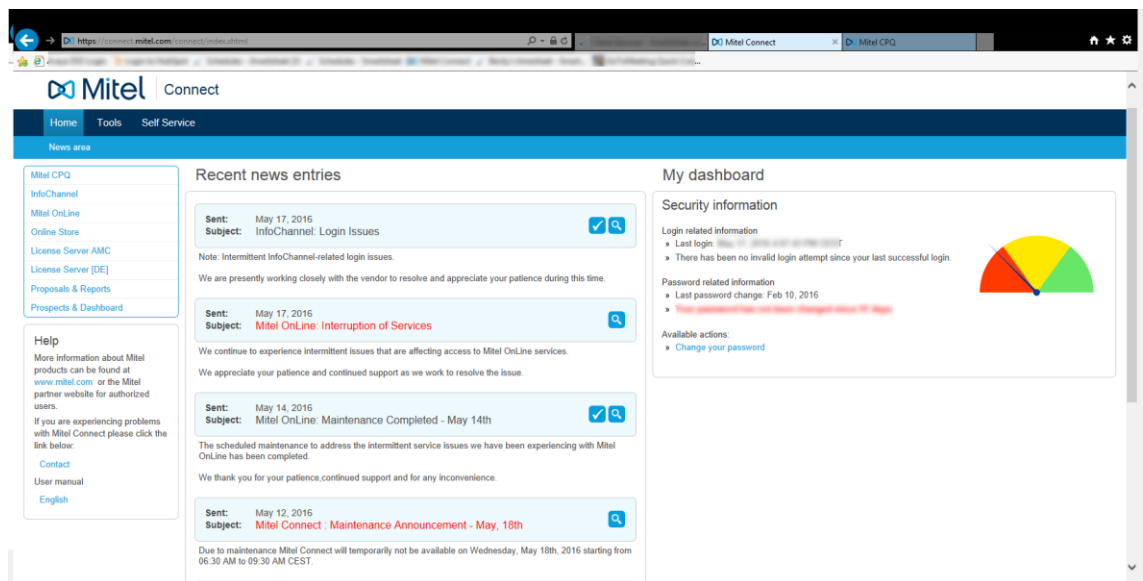


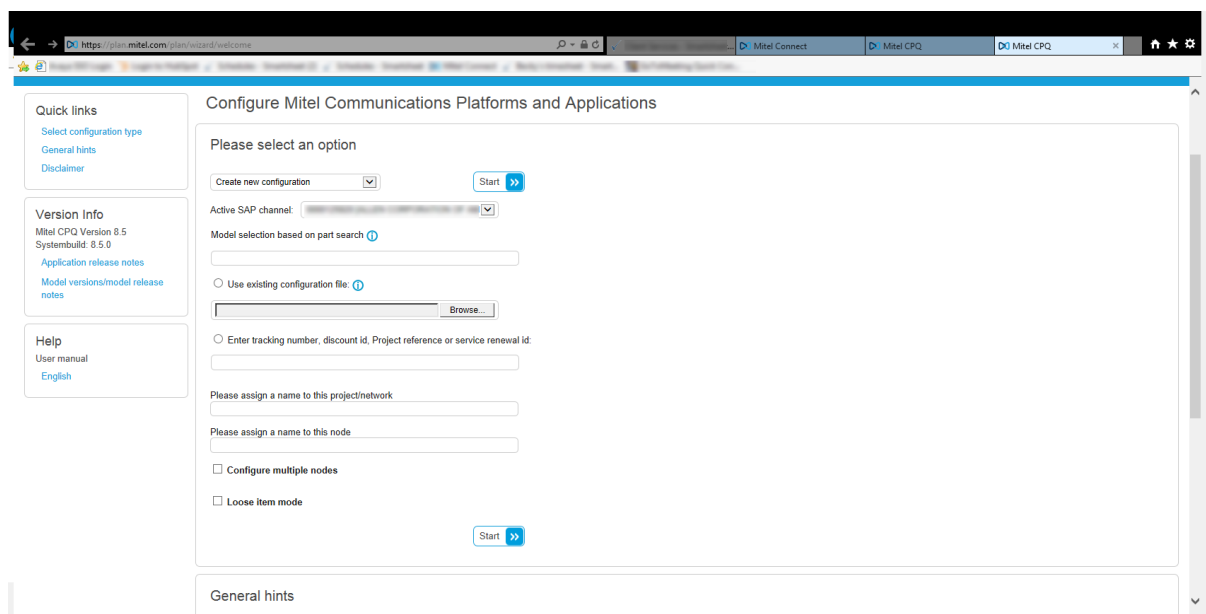
## Generating a Mitel CPQ Quote

\* 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

The screenshot shows the Mitel CPQ web application. The top navigation bar includes 'Start', 'Turnkey Base Systems', 'Base Packs, Licenses', 'Tap Interfaces - SW and HW', 'Misc. SW and HW', 'Prof. Services', 'SWA', 'Ext. Warranty', 'Results', 'Quote', and 'Order'. The 'Start' tab is active. The main content area is titled 'MiVoice Call Recording'. It features a 'Pricelist selection' section with the following text: 'The final configuration displays the required materials and prices (buy and sell prices). The sell-list price comes from one of your own-build sell lists which you select from the listbox below. If no sell list is selected, the sell-price column remains empty. Also no offer creation is then possible.' Below this, there are fields for 'Select the buy price list(s)' and 'Select the sell price list(s)'. The 'Buy price list(s)' field is set to 'Buy price "NA Base List in USD"'. The 'Sell price list(s)' field has radio buttons for 'none', 'End customer', and 'Reseller', with 'none' selected. Below these fields is a dropdown for 'Mitel parts / Template' set to 'none'. A 'back to top' link is at the bottom right of this section. Below the 'Pricelist selection' section is a 'General hints' section with a note: 'Please note that each line consists of a quantity field, the value range and the description. The value range defines the limits of material quantity of a valid input. The navigation through your configuration is done with the "Back"- and the "Next"- Button or directly with the links in the menu bar that represent the path of the configuration steps. To start a new configuration from scratch, you can either log in again or click the "Back to welcome page" button. Remember, that unsaved configurations will be lost. If you have any comments, hints or ideas, please feel free to contact your local Account Manager.' A 'back to top' link is also at the bottom right of this section. A left sidebar contains 'Navigation' (with back, forward, and home icons), 'Quick links' (with 'Pricelist selection' and 'General hints'), and 'Further links' (with 'Save user inputs' and 'Export user inputs').

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

The screenshot shows the top navigation bar of the Mitel CPQ web application. The 'Start' tab is highlighted in blue. Other tabs include 'Turnkey Base Systems', 'Base Packs, Licenses', and 'Tap Interfaces - SW and HW'.

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

#### 7. Go to Secure Transfer section

The screenshot shows the 'Secure Transfer' section. It contains three buttons: 'Open in Proposals & Reports', 'Save the configuration on the Mitel server', and 'Export XML to share with customer'. There is also a 'File Name:' field. Below these is a note: 'Note: The XML file doesn't contain buy prices. Save the configuration from the order page if buy prices are needed.'

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

The screenshot shows the 'Welcome to the Proposal and Reporting Tool' page. It features a 'Quick navigation' section with the following text: 'The Proposal and Reporting tool allows for the generation of either Proposals or standard reports. Your currently deposited Mitel CPQ tracking id is: [redacted]'. Below this are four links: 'Generate Proposal', 'End User Reports', 'Partner Reports', and 'Pricing Reports'.

## 9. Select Partner Reports


### Partner Reports



This section allows for several reports to be created.  
The report contains buy prices and is intended for partner use only.

Enter a tracking ID of a quote which has been saved and then select the report download button.  
An Excel report will then be downloaded. Depending on browser settings, you may be prompted to open or save the report before displaying it.  
You will need to "Enable Editing" in Excel to see calculated values.

Mitel CPQ Tracking ID\*:

\* indicates a required field

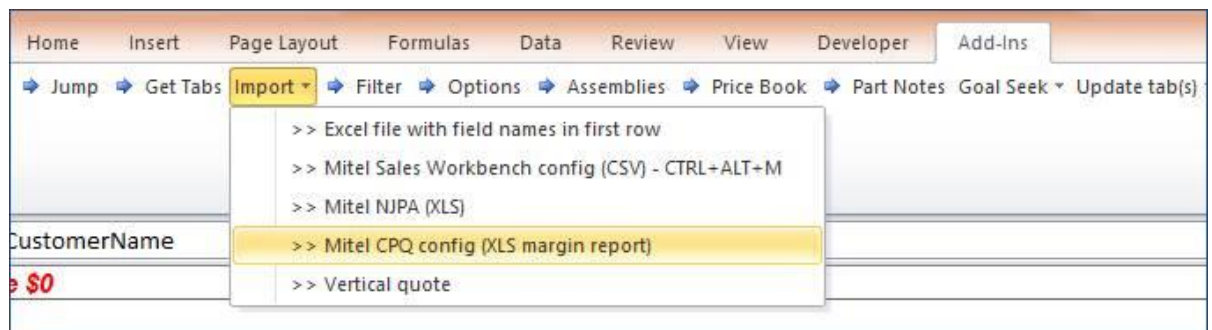


## 10. Select Generate the Margin Report

**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)



\*\*\*\*\*

**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.

**Mitel CPQ**

Configuration | **Saved Files** | User profile

Search for files saved on the Mitel server

The values of all relevant fields and configuration information will be fulltext-searched (= all content must contain your input somewhere). Enter a minimum of 3 characters.

Search keyword:  [Search >>](#) [Advanced search >>](#)

Latest files saved on the Mitel server (max 200)

Project Name Tracking Number	Project Discount ID Project Reference	Prospect ID	File Name Creator / Creation Date	SAP	Type	Total price	XLS	XML	Miq	Prp	Del
	-	-			Order	30483.00 USD					
	-	-			Quote	403587.50 USD			-		
	-	-			Quote	409732.50 USD			-		
	-	-			Quote	47463.00 USD			-		
	-	-			Quote	11025.00 USD			-		

- 
- 
3. In the Saved Files, go to the **Prp Column** to get to the Proposals and reports directly.
4. You will notice it has the Saved configuration ID.

**Mitel** Proposals & Reports

Home | **Proposals** | Reports | User Profile

Help  
More information about Mitel products can be found at [www.mitel.com](http://www.mitel.com) or the Mitel partner website for authorized users.

Version Information  
Application version: 2.1.0

Welcome to the Proposal and Reporting Tool

Quick navigation

The Proposal and Reporting tool allows for the generation of either Proposals or standard reports.

Your currently deposited Mitel CPQ tracking id is

- » [Generate Proposal](#)
- » [End User Reports](#)
- » [Partner Reports](#)
- » [Pricing Reports](#)

**Mitel**

