MiTAC CTO Portal User's Guide

Version 2.0 - 2024-03-01

Introduction

MiTAC CTO Portal (Portal) is designed to allow customers to quickly generate a Quote Inquiry. Users can create an inquiry, add and configure the products, and submit to MiTAC for acceptance. The tool helps the users to facilitate their inquiries for further processing downstream.

Usage Scenario - Distributor Users

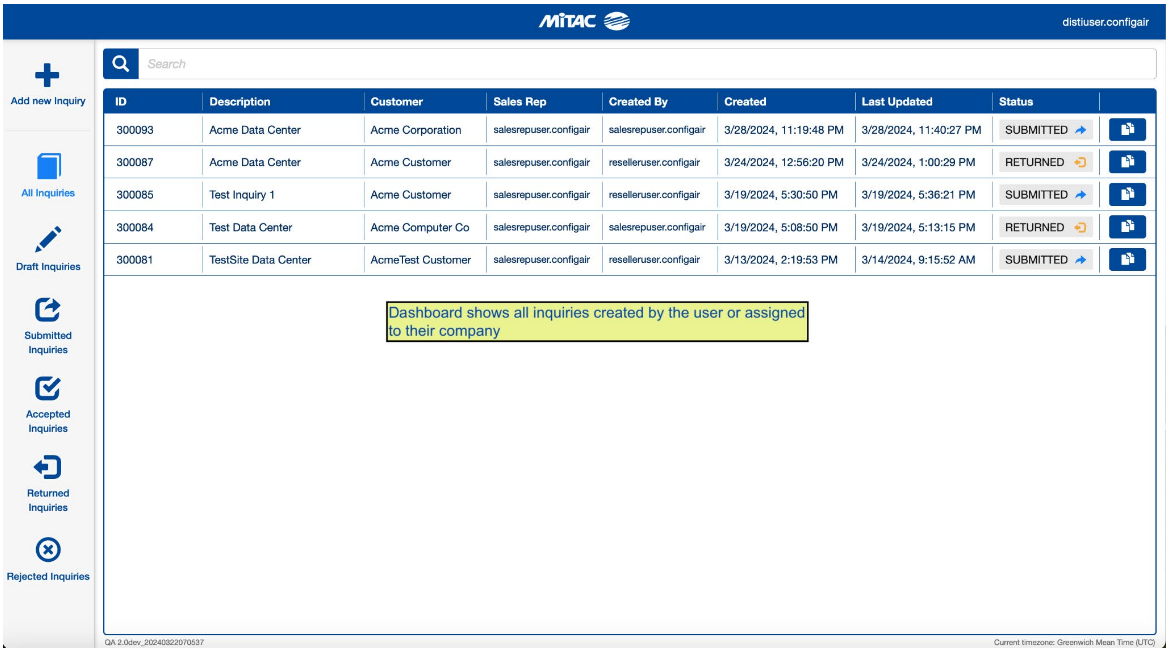
Distributor users have a main function of creating and managing their own inquiries as well as managing inquiries that have been assigned to their company (Distributor). The main function is to create and submit the inquiries to MiTAC. Users can request the inquiries to be returned for editing. Once the inquiries are ACCEPTED or REJECTED, the inquiries are no longer editable.

CTO Portal Workflow

A. Login

All users are required to authenticate with MiTAC Single Sign-On. You will need to be registered with MiTAC in order to receive access. When you try to access the MiTAC Portal, you will be redirected to MiTAC's authentication screen to login. Once authenticated, you will be redirected back to the Portal.

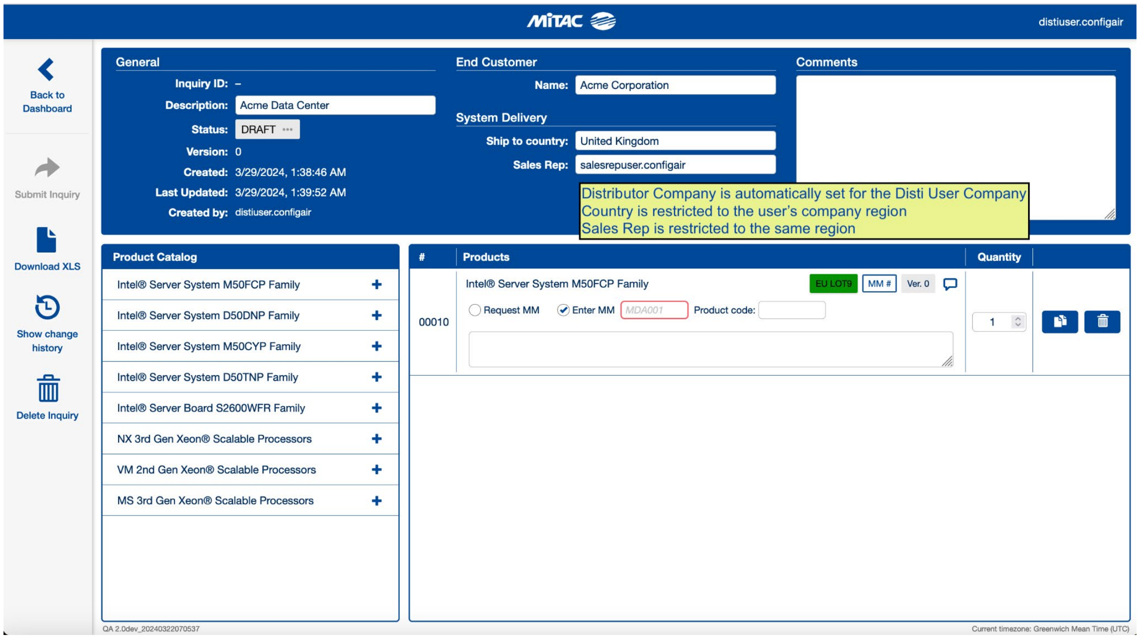
B. Dashboard



a. Buttons:
   i. Add New Inquiry - Create a new inquiry
   ii. All my Inquiries - View all inquiries
   iii. Draft, Submitted, Accepted, Returned, Rejected - View inquiries by status
   iv. Search - Search for an inquiry
   v. Inquiry listing - show all matching inquiries

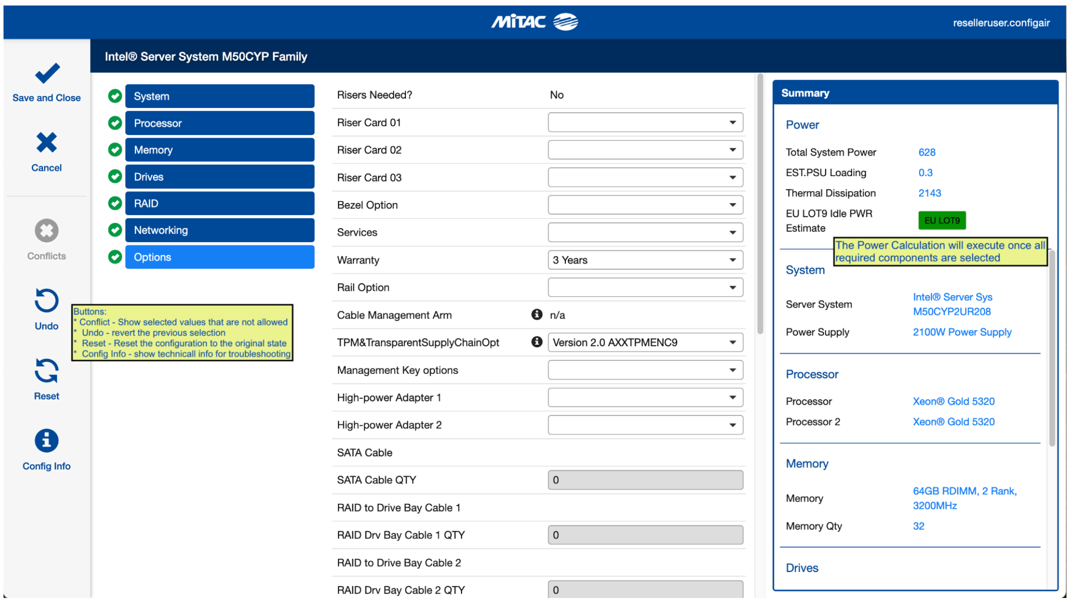
C. New Inquiry

To add a new Inquiry, click on the Add New Inquiry . This allows you to start creating an inquiry. The following data are required (as indicated by the yellow exclamation mark) in the Inquiry Detail Screen:



1. Headers
    a. Description - Text input field to describe the inquiry
    b. End Customer Name - Name of the customer the inquiry is created for
    c. Ship to Country - The list of countries is restricted to the same region assigned to the user's own company. Sales Rep list is also restricted to only those Sales Rep in the same region.
    d. Comments - Text input field to record comments about the inquiry
    e. Actions allowed:
        i. Back to Dashboard - save the inquiry and return to the dashboard
        ii. Submit inquiry - when the inquiry is completed, it can be submitted
        iii. Download XLS - generate the Excel output files for the inquiry
        iv. Show change history - show all the changes from all users for this inquiry
        v. Delete inquiry - option to delete a DRAFT inquiry. Once submitted the inquiry cannot be deleted.

2. Adding Products
    a. Select a product to add to the inquiry by clicking on the + symbol
    b. Once added, the product can be configured but clicking on the product name
    c. Additional fields can be modified - MM# (when the configuration is complete), Comments, Quantity
3. Configuring Product



    a. To configure the product, the user will navigate through the different tabs to complete all the required options. By default, the configuration is in an incomplete state and the required field are marked with the yellow exclamation mark.
    b. Selected options are displayed in the Summary tab.
    c. When the configuration is completed, the Power calculator will be executed. The power calculator will be green when all components have been selected (System, Processors, Memory, Drives, and other required components.)
    d. When the configuration is completed the user can click on the ‘Save and Close’ which will save the configuration and return to the inquiry.
    e. The actions that can be performed in the configuration screen include:
        i. Save & Close - save changes and return to the inquiry screen
        ii. Cancel - don’t save changes and return to the inquiry screen
        iii. Conflict - when turning red, it indicates that the configuration contains error.
        iv. Undo - revert the last change
        v. Reset - revert to the initial state of configuration.
        vi. Config Info - show various diagnostic data relating to the product.

D. Return Inquiry For Editing

a. Distributor User can view the submitted inquiry at any time. This includes their own inquiries as well as those assigned to their company.

b. The Distributor User can mark the inquiry as ‘RETURNED’ which will revert the inquiry back with the RETURNED status, and allows for editing. Only SUBMITTED inquiries can be returned for editing. ACCEPTED or REJECTED inquiries are not editable.
c. Only the original creator can modify the inquiry. So if the inquiry was created by the same user, it can be edited.
d. Once the editing is completed, the user can re-submit the inquiry.

E. Notifications

The following ar e examples of notifications by email when an inquiry status has changed.

a. Submit

Incoming L9 CTO Quote Inquiry ID 300093. Customer: Acme Corporation

MiTAC QA-CTO Portal <mitac_cto@mitacmct.com> Thu, Mar 28, 11:40 F
to me

A new quote inquiry has just been submitted by salesrepuser.configair (salesrepuser.configair@gmail.com).

Description: Acme Data Center
Customer: Acme Corporation
Inquiry Number: 300093
Country: United Kingdom
Distributor Name: ConfigAir Test
Requesting MM#: NO
Version: 1

The following line items have been changed:
Line Item 00010 - Version 1

You may view the BOM config at https://mitac-qa.mic.com.tw/#/inquiry/958f6cf2-e204-40d4-b861-9cc7536cdf77

One attachment • Scanned by Gmail

MiTAC_Inquiry_3...

b. Return

Returning L9 CTO Quote Inquiry ID 300087. Customer: Acme Customer Inbox ×

MiTAC QA-CTO Portal <mitac_cto@mitacmct.com> Sun, Mar 24, 1:00 PM (5 days ago)
to reselleruser.configair

A quote inquiry has just been returned by reselleruser.configair (reselleruser.configair@gmail.com).

You may view the BOM config at https://mitac-qa.mic.com.tw/#/inquiry/82f716c2-d397-4865-953f-027c942aaa20

c. Accept

Accepting L9 CTO Quote Inquiry ID 300085. Customer: Acme Customer Inbox ×

MiTAC QA-CTO Portal <mitac_cto@mitacmct.com> 2:11 AM (0 minutes ago)
to reselleruser.configair

A new quote inquiry status has just been accepted by distiuser.configair (distiuser.configair@gmail.com).

Description: Test Inquiry 1
Customer: Acme Customer
Inquiry Number: 300085
Country: GB
Distributor Name: ConfigAir Test
Version: 1

You may view the BOM config at https://mitac-qa.mic.com.tw/#/inquiry/db632217-dc93-4f56-843c-3ba864fd0c12

d. Reject

Rejecting L9 CTO Quote Inquiry ID 300093. Customer: Acme Corporation Inbox ×

MiTAC QA-CTO Portal <mitac_cto@mitacmct.com> 2:13 AM (0 minutes ago)
to me

A quote inquiry has just been rejected by distiuser.configair (distiuser.configair@gmail.com).

You may view the BOM config at https://mitac-qa.mic.com.tw/#/inquiry/958f6cf2-e204-40d4-b861-9cc7536cdf77