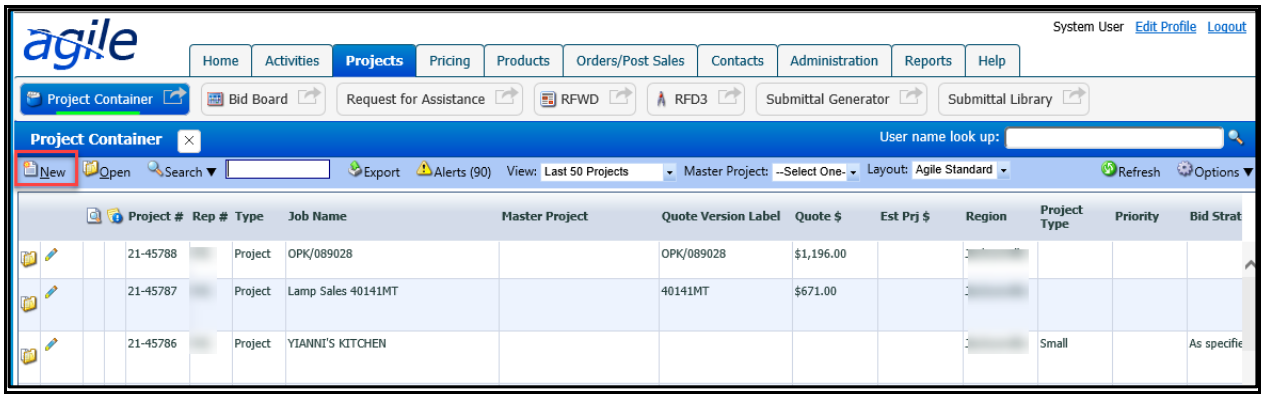
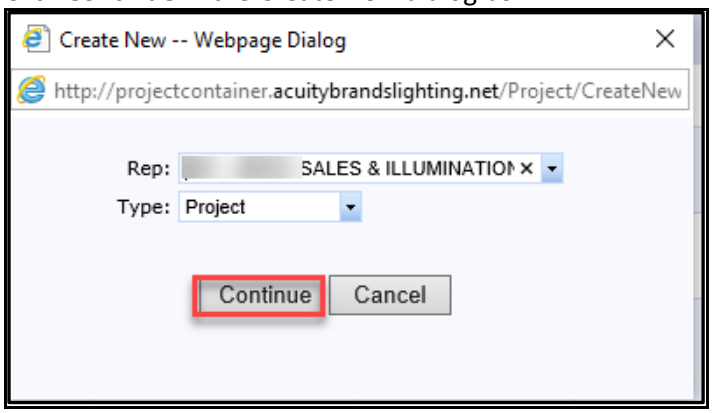
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Create a new Project Container

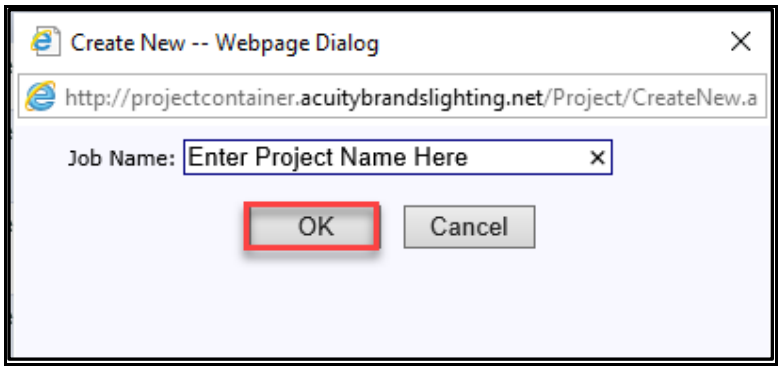
- Click the **New** button from the Project Container Dashboard



- Click **Continue** in the Create New dialog box



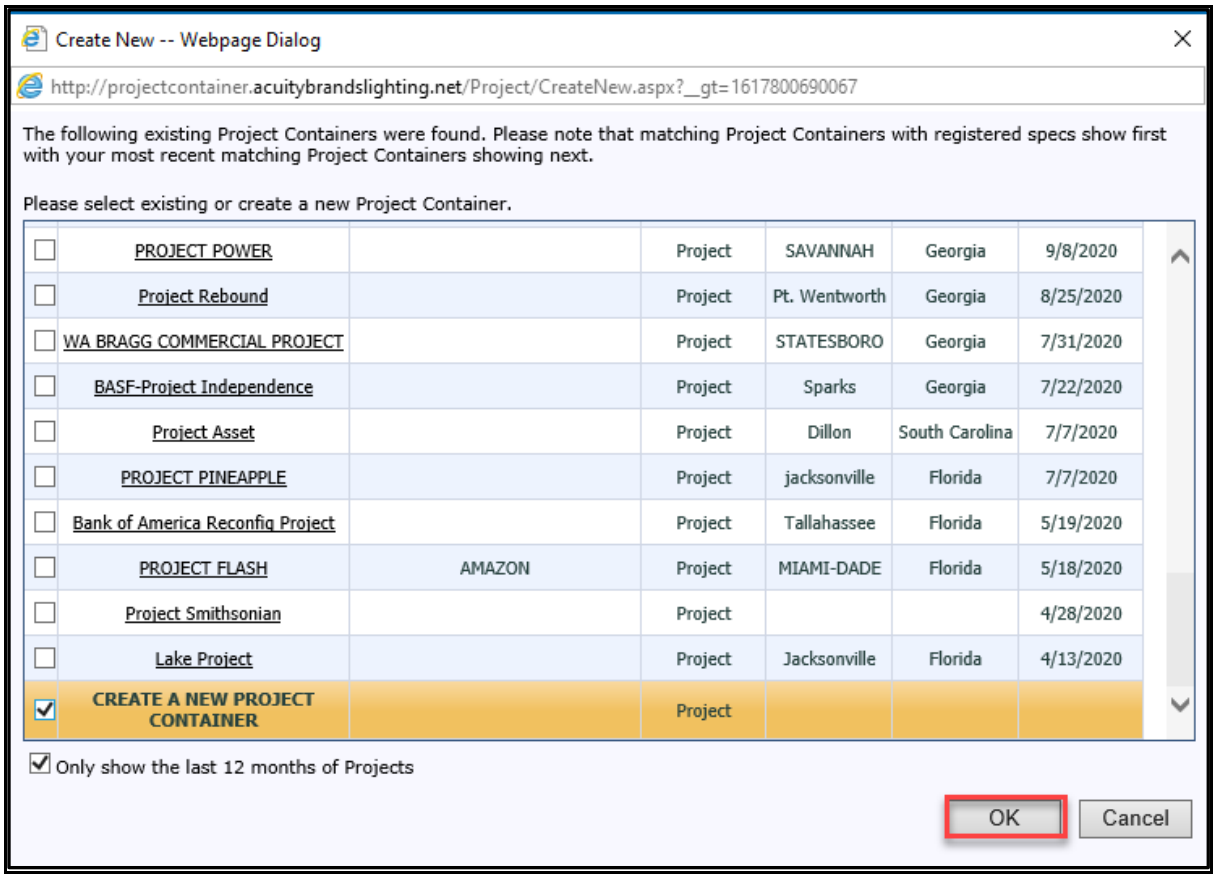
- Enter the Project Name then click **OK**



- A duplicate project check will be performed to determine if there are already existing projects with the same name
- If you determined that you are creating a duplicate project, **check the box** next to the project that already exists to open that project
- If you are creating a new project, click the box next to **Create a New** Project Container then click **OK**

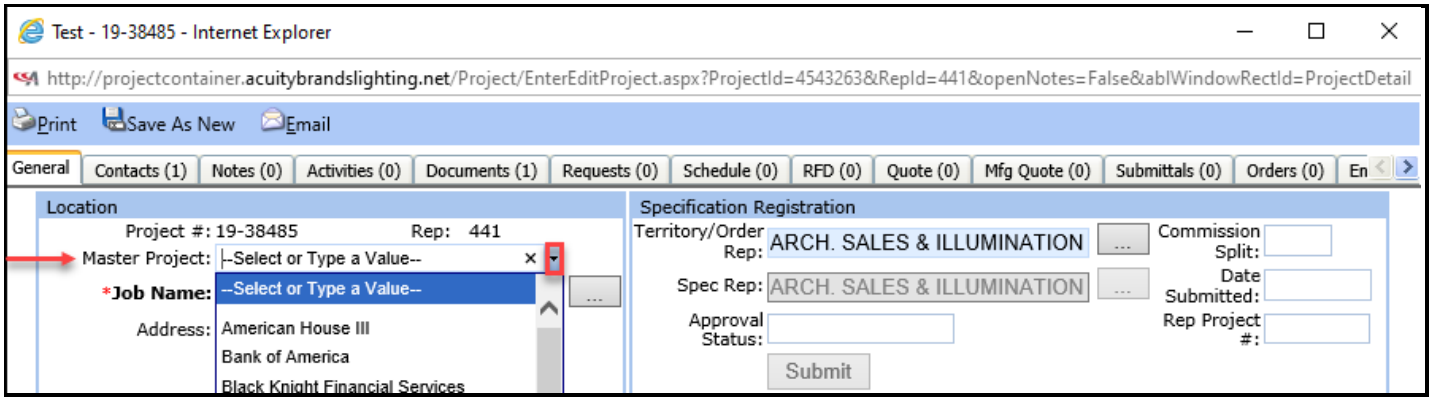
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Note: By default, the 'Only show the last 12 months of Projects' box is checked



Creating a Master Project Label

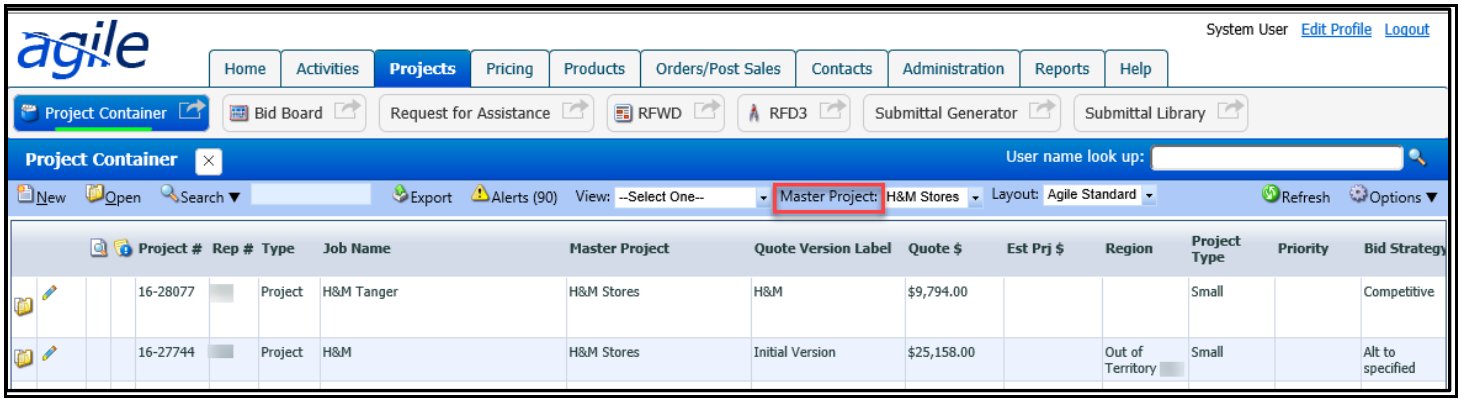
- You can create a Master Project Label to help you organize projects that have different names but are part of a larger project.
- Choose an existing **Master Project Label** or enter a new label by typing in the Master Project field. Your newly added label will now be in the dropdown list.



Revised: 4.6.21

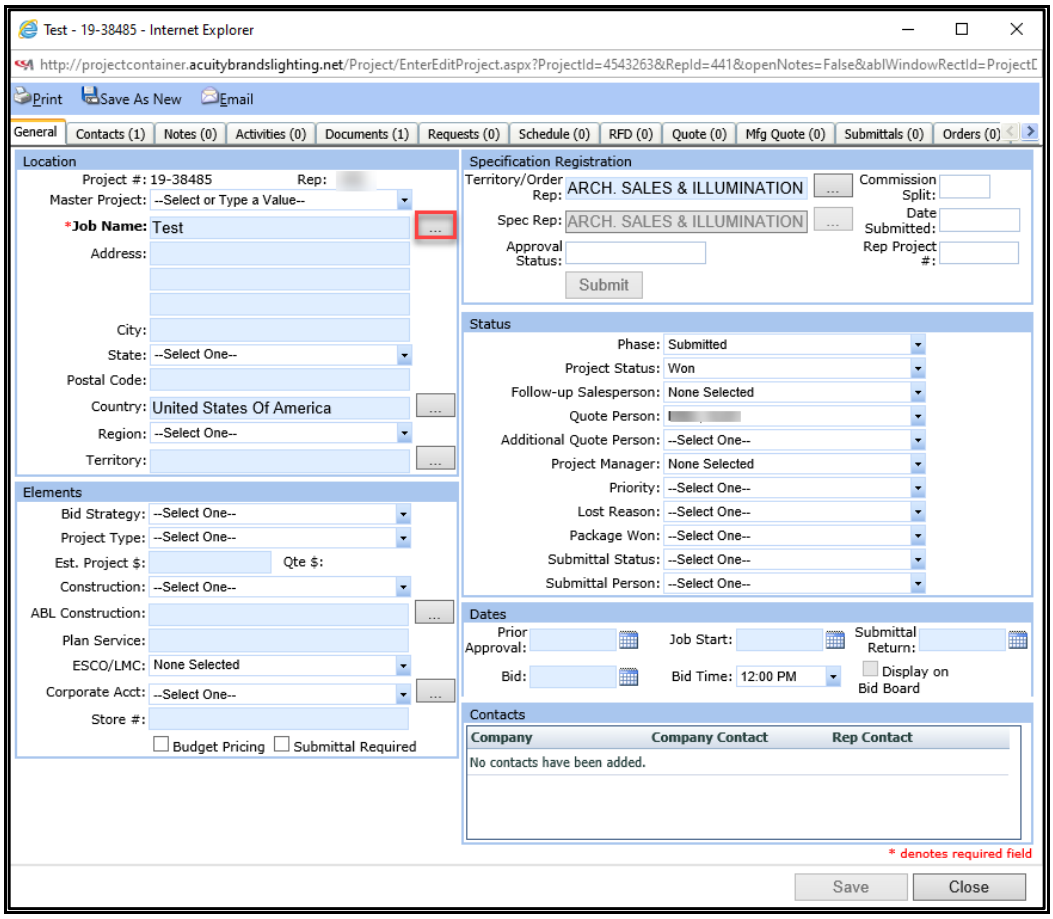
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- You can filter projects with Master Project labels from the Project Container dashboard.
- Click in the **Master Project** dropdown and choose your master project. All projects that contain the same Master Project label will be displayed.



Creating a Job Alias

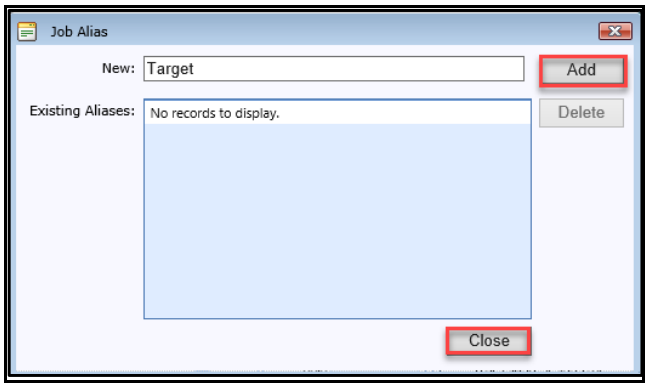
- There are times where project can take on several names. You can identify these by creating a Job Alias. Click the **ellipse** next to the Job Name.



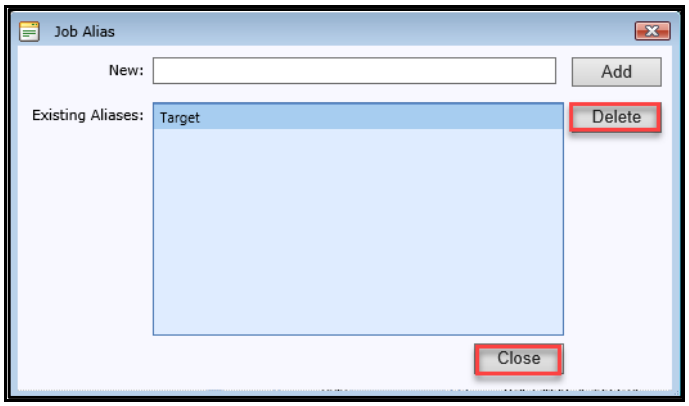
Revised: 4.6.21

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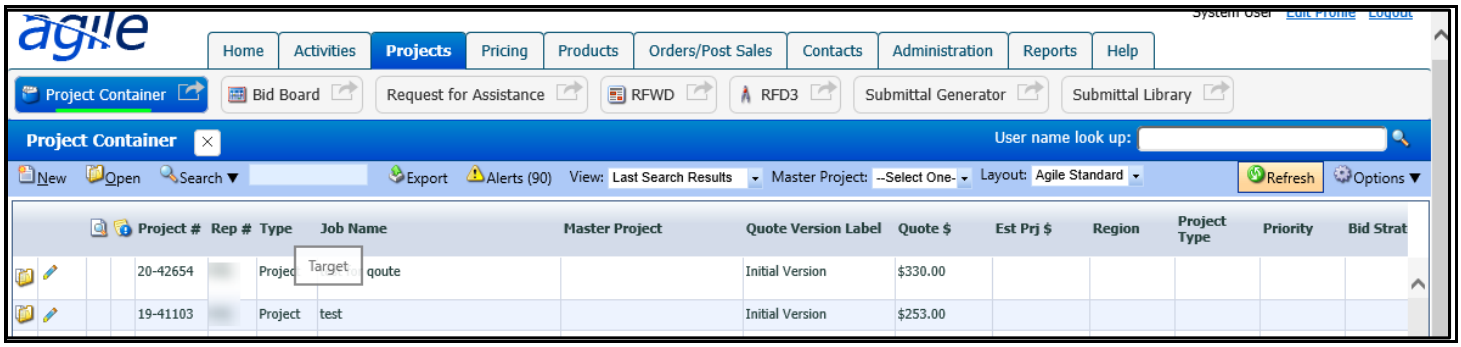
- To create a new Job Alias, enter the alias then click **Add.** Then click the button. Multiple aliases can be added by repeating these steps.



- To delete the Job Alias, highlight the Job Alias in the list of existing aliases and click **Delete.** Then click the **Close** button.

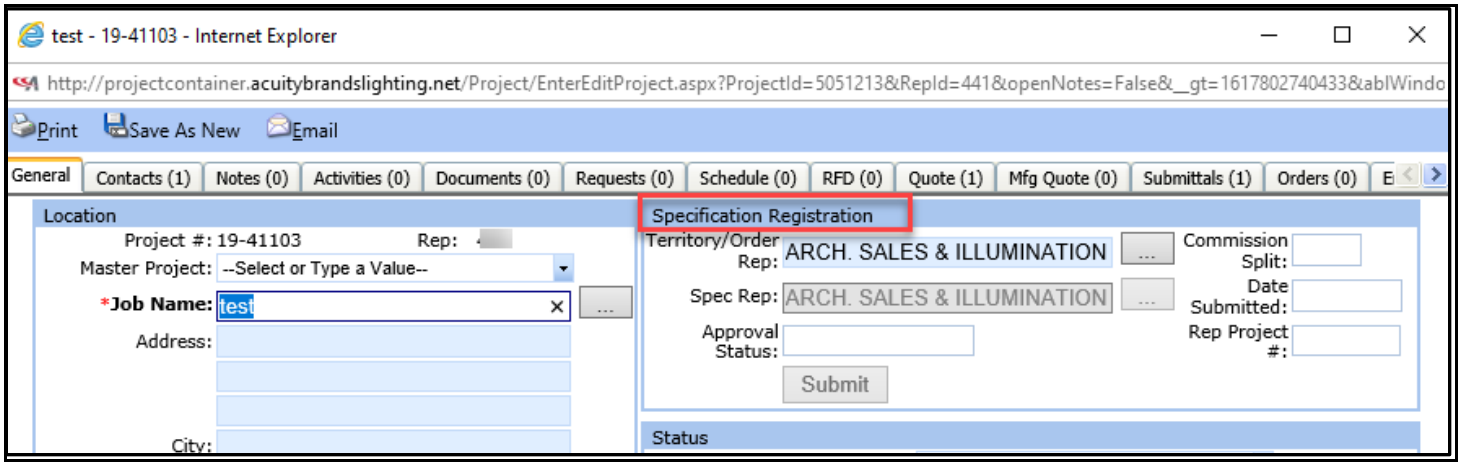


- The **Job Alias** will be visible when you hover over the Job Name from the Project Container Dashboard.
- A project can be searched for and opened by any of its jobs aliases.

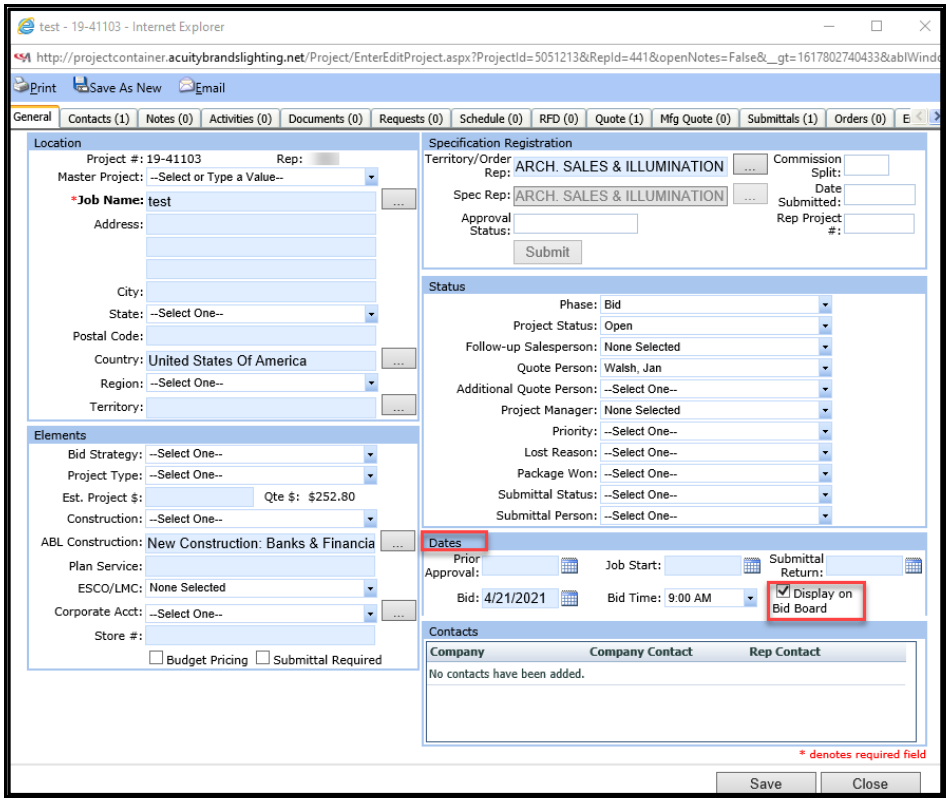


Revised: 4.6.21

- The top right section is reserved for projects that need to be registered for Specification Credit. Please refer to the Spec Registration Quick Reference Guide for the steps required for this process.



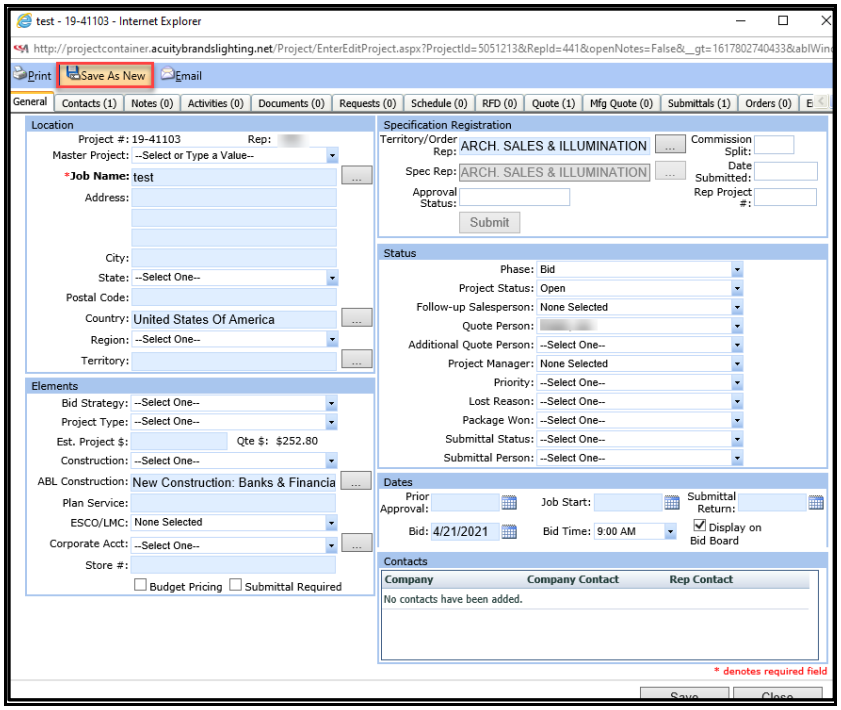
- Bid dates that are entered in the **Dates** section are displayed on the Bid Board. Please reference the Bid Board Quick Reference Guide for further details



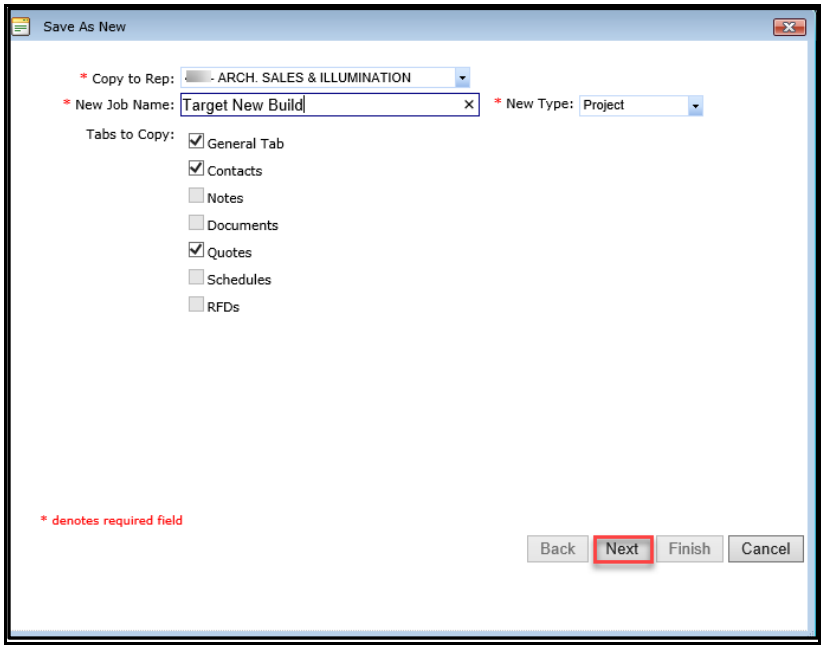
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Saving a Project using the Save As New Process

- You can create copies of Projects by using the Save As New function.
- Click the **Save As New** button on an existing project.

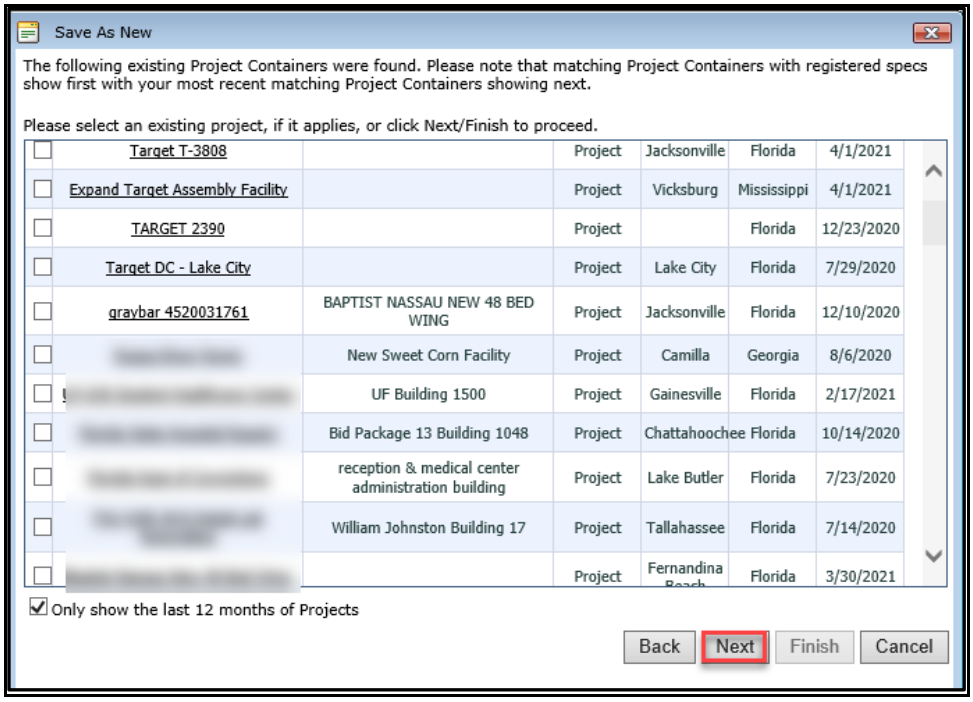


- Name your new project, check the boxes for the tabs you want to copy then choose **Next.**

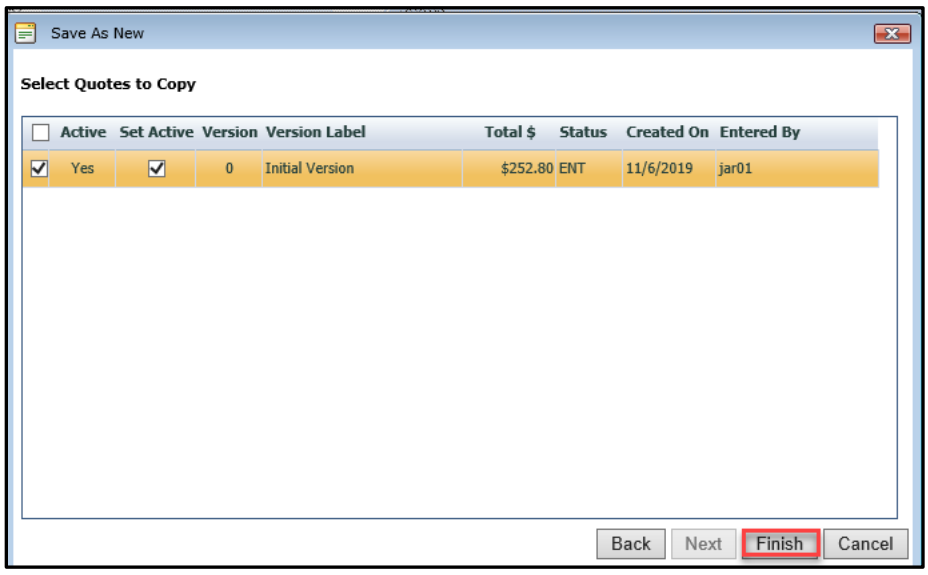


Revised: 4.6.21

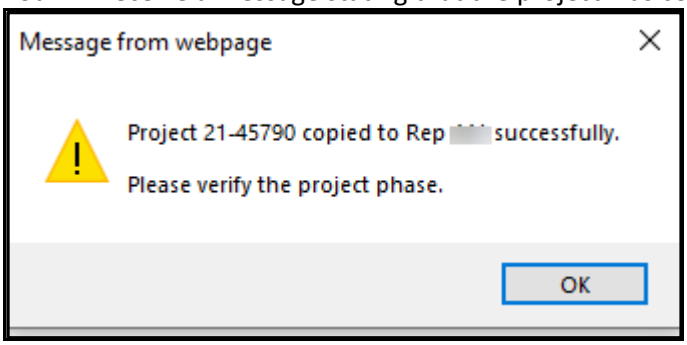
- The duplicate project check will be performed. If you are not duplicating the project, click **Next.**



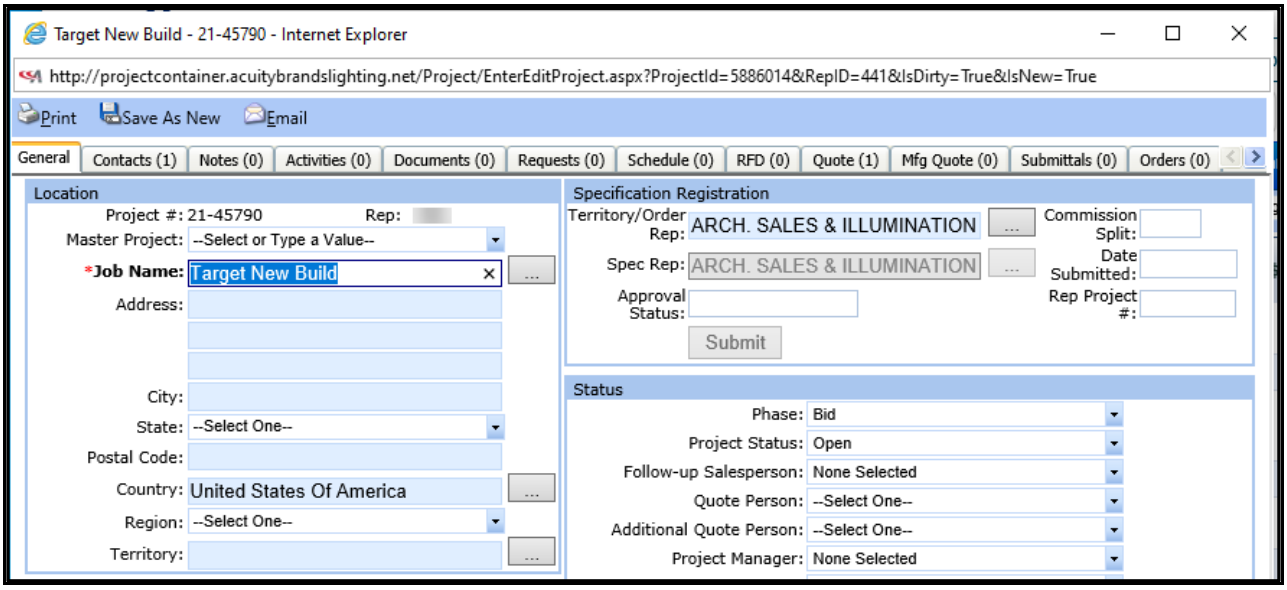
- If you are copying a Quote tab, you will be asked to identify the quote you want to copy and version. If the Quote is not already set to active you will need to check the Set Active box. Click **Finish** to complete to create the new project.



- You will receive a message stating that the project was copied successfully



- The new project will open and the one you copied from will close



There are several tabs across the top of each project. By default, each project will open to the General tab. Below is a high-level description of each tab.

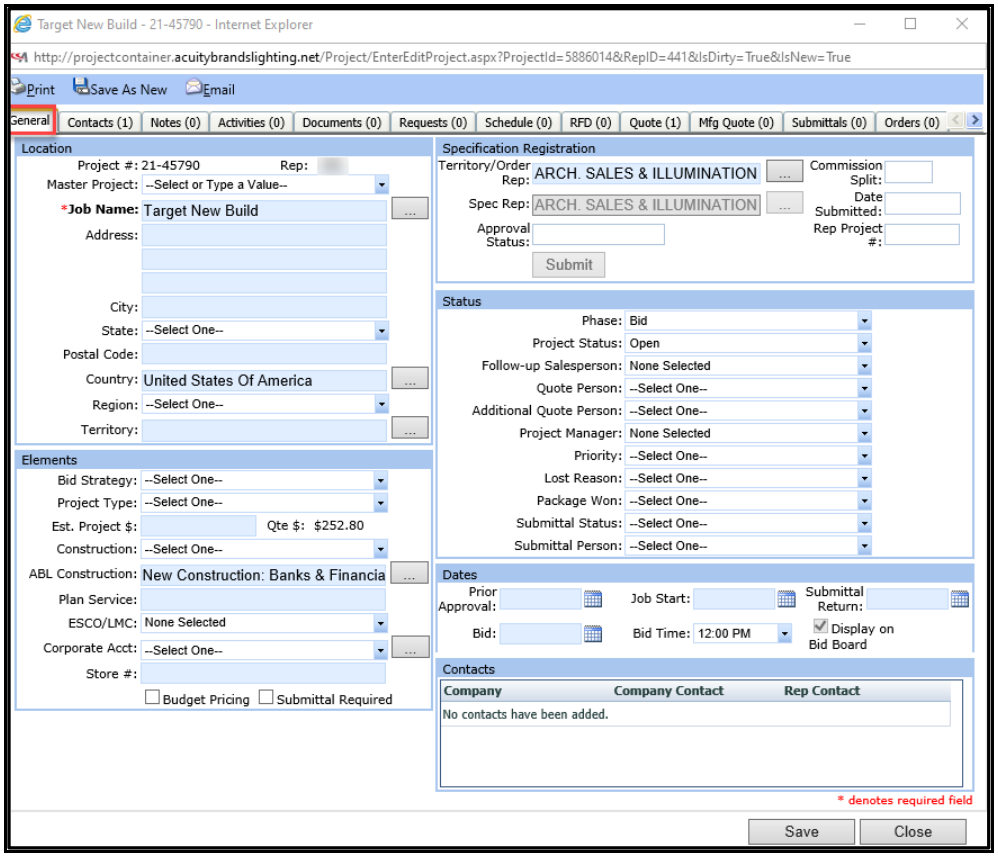
- **General Tab** – contains majority of the project information and should be updated throughout the life of a project.
  - **Location**
    - Allows you to add job name, master project names, aliases, addresses, Region, Territory
  - **Elements**
    - Assign Bid Strategy, Est. Project $, Construction types, ESCO/LMC, Corporate Account, store numbers. Selections available to indicate Budget Pricing or whether a Submittal is Required

  *Note: If the ABL construction category is Renovation Unplanned, then the **ESCO/LMC** is a required field (otherwise it's not editable). ESCO is energy service company and LMC is lighting management consultant. The values in the ESCO/LMC drop down come from salesforce and is managed by the Acuity Sales Team.*

- **Specification Registration**
  - Request out of territory specification credit from other ABL agents
  - More details on Spec Registration are located in the Specification Registration Quick Reference Guide in the Help Section
- Status
  - Many phases are auto updated based on business flow of the project
  - Assign agency employees to be assigned as Follow-up Salesperson, Quote Person, Additional Quote Person & Project Manager for project management and reporting
  - You can also track the Submittal Status by assign a status and adding the submittal person
- *Dates*
  - Add Prior Approval, Job Start, Submittal Return Dates, Bid Dates & Time
  - When selecting **Display on Bid Board** the Project will be visible in the Bid Board application

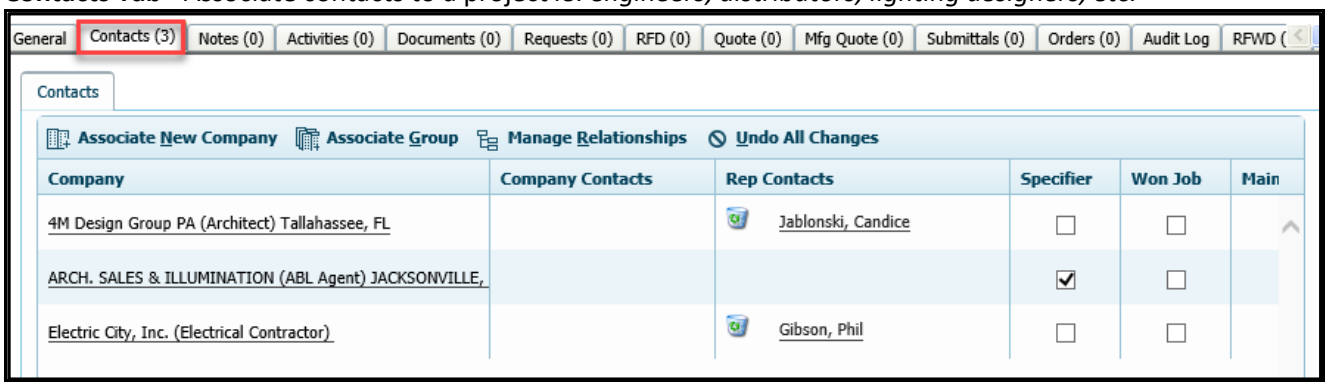
- Some dropdown options are customizable for agency specific categories. Categories available to be customized are: Bid Strategy, Construction, Document Category, Lost Reason, Notes Category, Package Won, Phase, Priority, Project Type, Submittal Status, Region

Note: *You must have Project Container Administration rights to add any new categories. The existing category phases cannot be edited or inactivated*

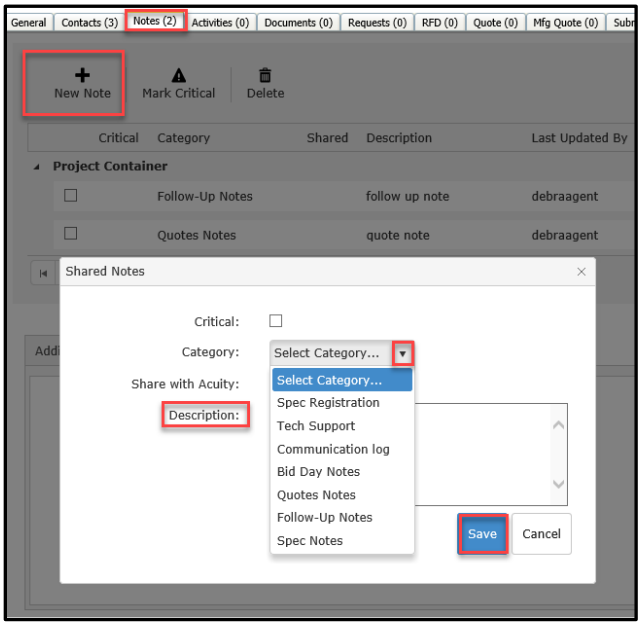


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- **Contacts Tab** - Associate contacts to a project *ie: engineers, distributors, lighting designers, etc.*



- **Notes Tab** – Add notes to a project
  - Select **New Note**
  - Select Category, enter details in the Description, then **Save**

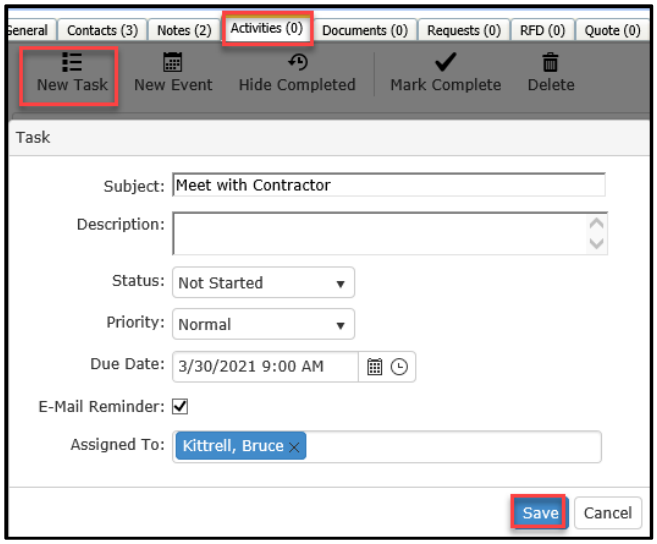


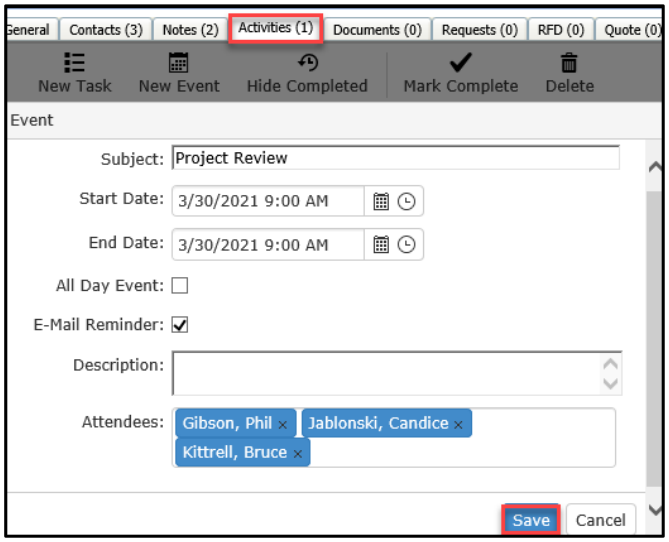
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- **Activities Tab** – Create a Task or Event associated to the project. Start and End dates can be assigned, email reminders can be set.

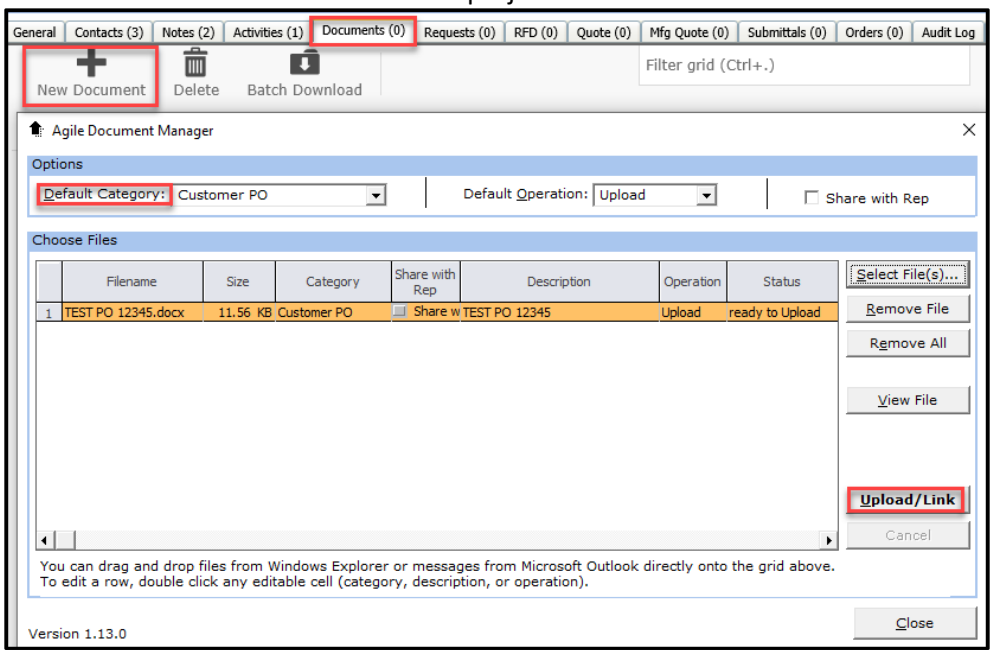
  - **Create Task or Event**
    - Select **New Task,** enter or select from the available options, then **Save**
      ie: Task - "to do" type item with a due date

    - Select **New Event**, select from the available options, then **Save**
    - *ie: Event – allows you to create a specific activity with a start and end time such as a meeting*



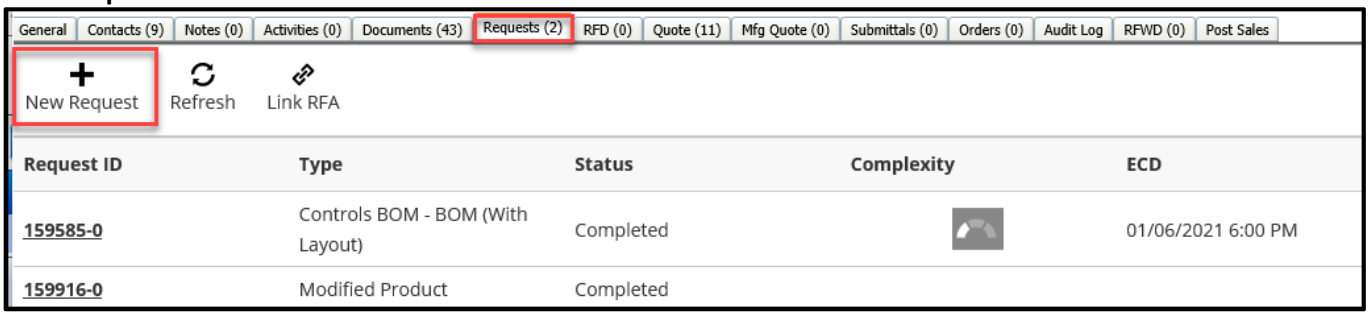


- **Documents** Tab – Add documents to a project

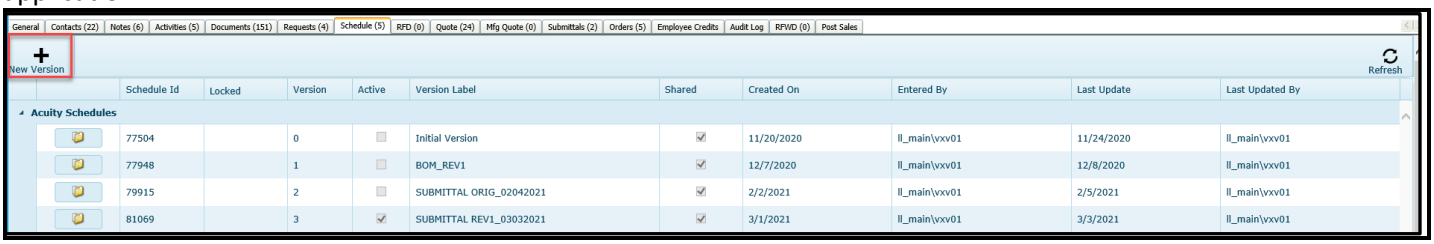


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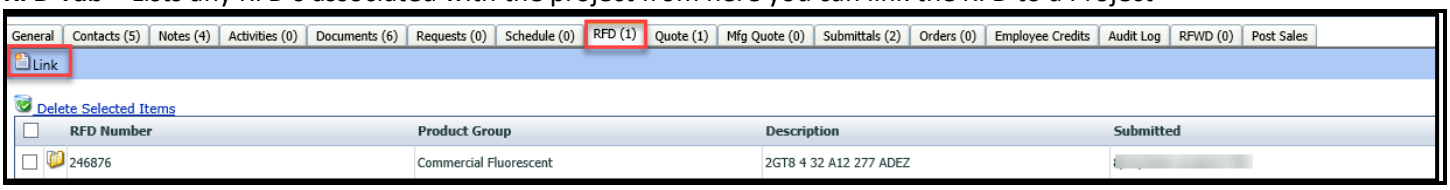
- **Requests Tab** – Displays any RFA requests associated to the Project, RFA requests can also be generated by selecting **New Request**



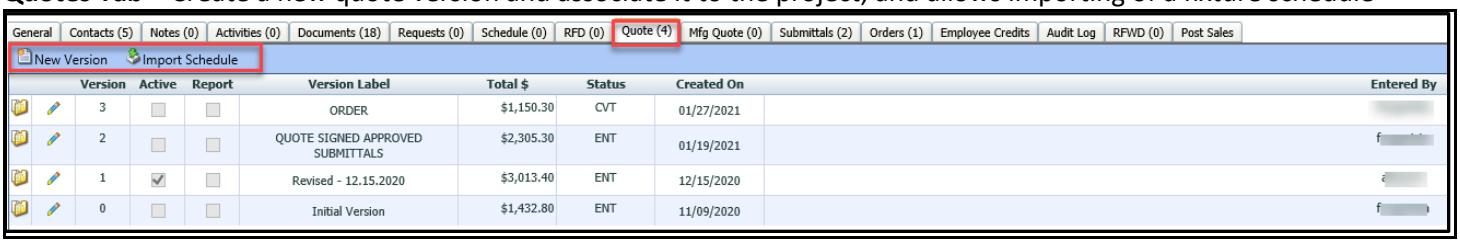
- **Schedule Tab -** Stores any schedules created by the Product Groups, these can be imported into a quote.
  A New version of a schedule can be created by selecting **New Version** which will launch the Schedule Builder application



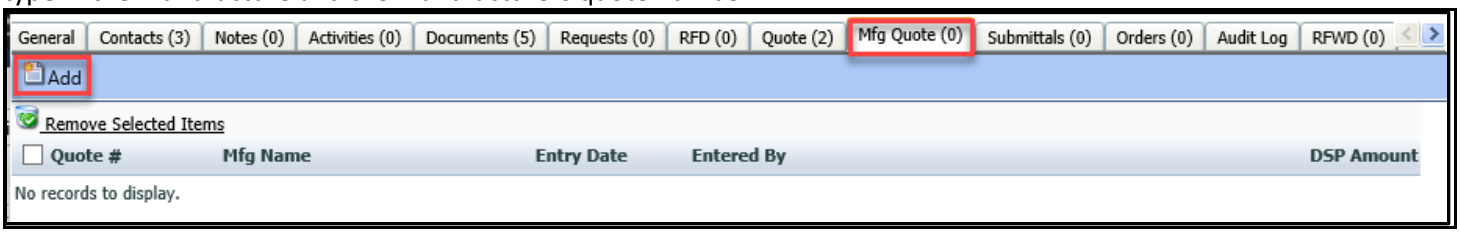
- **RFD Tab** – Lists any RFD's associated with the project from here you can link the RFD to a Project



- **Quotes Tab** – Create a new quote version and associate it to the project, and allows importing of a fixture schedule

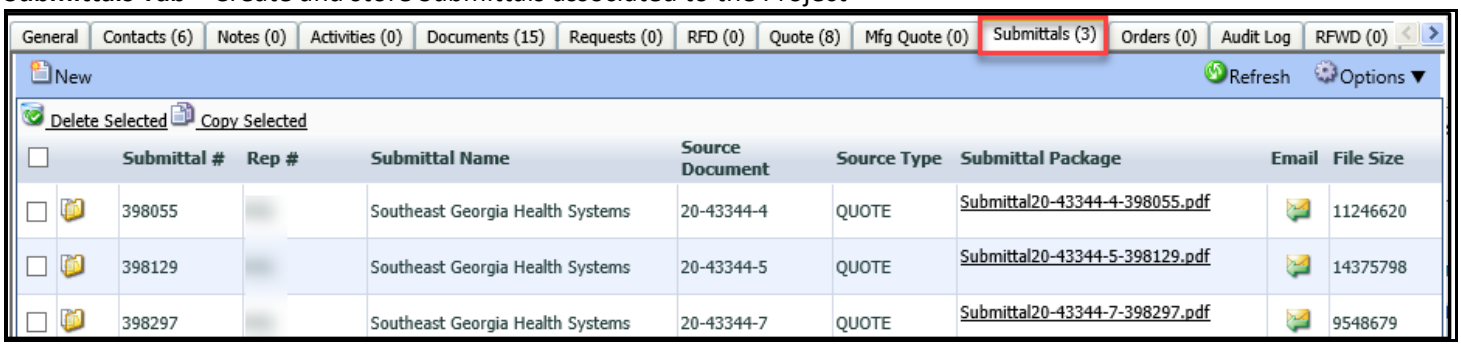


MFG Quote –Not widely used, it was an available option before quotes was developed that allowed you to manually type in the manufacture and the manufacturers quote number



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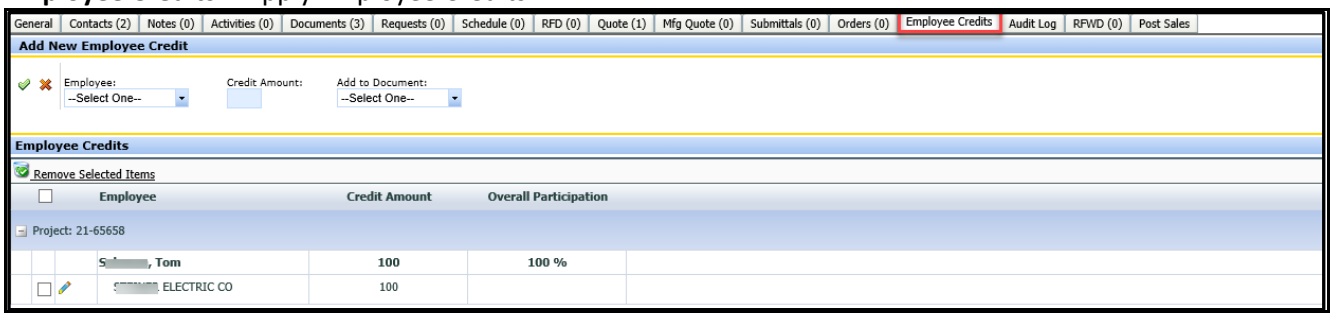
- **Submittals Tab –** Create and store Submittals associated to the Project



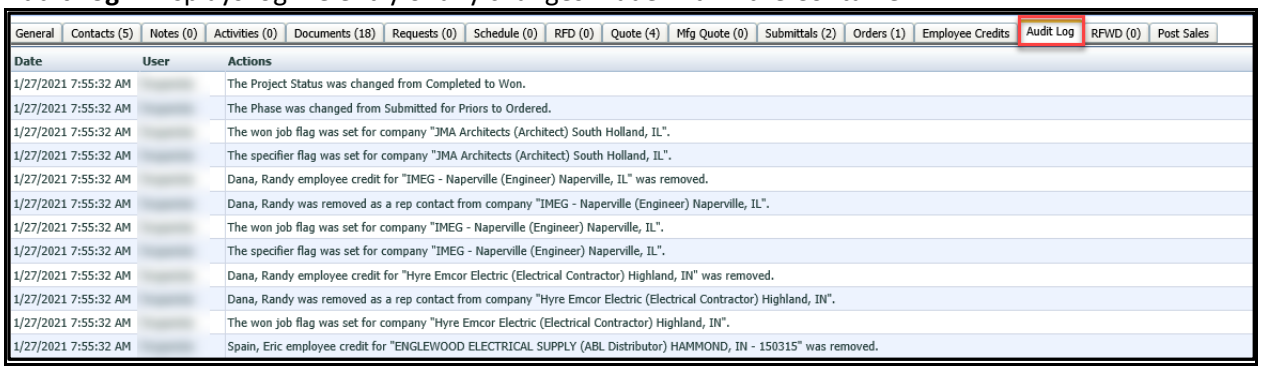
- **Orders Tab –** Lists any orders that are linked to the Project Container. You can also create a new order by clicking the **New** icon. You can select the **Link** icon to link an order to the Project



- **Employee Credits –** Apply Employee Credits

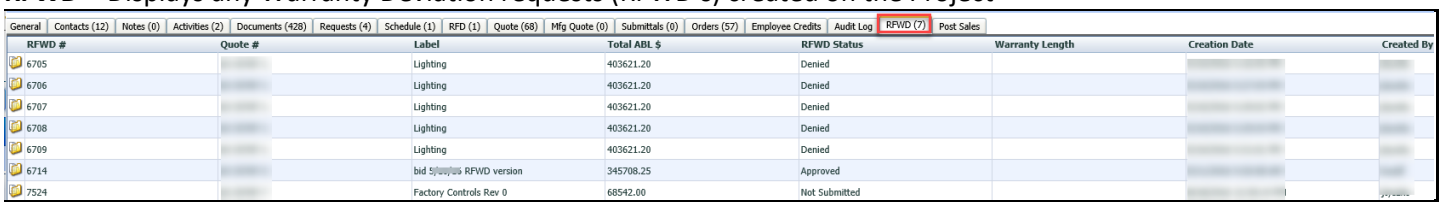


- **Audit Log –** Displays log file entry of any changes made within the Container



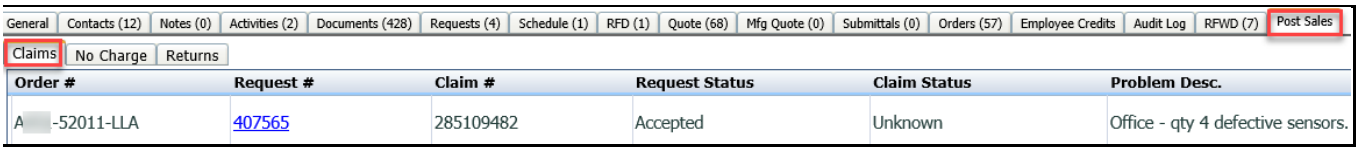
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- **RFWD –** Displays any Warranty Deviation requests (RFWD's) created on the Project

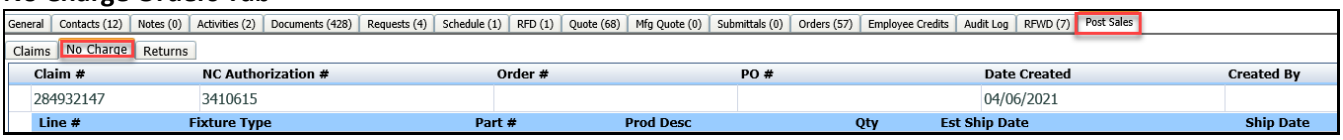


- **Post Sales –** View all Warranty Claims, No Charge Orders and Returns associated to the Project

  - **Claims Tab**



  - **No Charge Orders Tab**



  - **Returns Tab**

