NEW - Process Reference Guide

Six Basic Sub-Processes of Spec Registration

1. Submitting a Registration
2. Accepting/ Linking a Registration
3. Disputing/ Negotiating/ Escalating a Registration
4. Determining Status of Registration and Project Phase
5. Manual Corrections/ Matching Orders
6. Reconciling Project Orders and Commission Splits

Basic Operations: Submitting a Registration

1. Open a new project container - *Create new spec registration*
2. Estimate project value for (Acuity $DSP)
3. Enter a Territory Rep based on where project will be constructed
4. Enter requested commission split (default spec credit split is 50%)
5. Attach and "share with rep" supporting documentation (fixture schedule on specifier-issued document is preferable)
6. Submit (optional to add a note to territory rep about project)

Note: When submitted, an email is automatically sent to the (agile administrator at the) Territory Rep and creates an alert on the Territory Rep's dashboard – requesting action.

Note: The Acuity Spec Registration Team and Sales Personnel do not have visibility of the spec registration or project container at this point.

Acuity Spec Registration Policy Guidelines, Updated October 10, 2019

Most Common Issues and Questions:

A. Territory Rep cannot access attached documentation

Possible Cause 1: Did not click checkbox "share with rep"
Agile Blog - Document Sharing Improvements

Possible Cause 2: Uploaded documents incorrectly using wrong application

B. Spec Rep does not select correct territory rep number.

Recommended Best Practice: Use ABL Rep locator in Agile drop-down located on territory rep field (project city/state) which will take you to the Acuity Brands website ABL Rep Locator

Timesaver: *Use Agile "Save As New" function to copy the original container, then submit to the correct Territory Rep, then remember to cancel the incorrect registration*

C. Spec Rep wants to Register a project in their own territory

Standard work for why and how to do this in Agile
Register in-town spec process

Basic Operations: Accepting / Linking a Registration

1. Spec Registration is received by Territory Rep (TR) in Agile. They have three options: **Accept**, **Dispute,** or **Under Review.**
2. If the TR concurs with the registration *and already has their own Agile Project Container*, they can choose **Accept**, then select **"Link to Existing Project".** This will give the Spec Rep (SR) visibility of key project information that will enable both Reps to collaborate on the project.
3. If the TR concurs with the registration and *does not already have an existing project container*, they can choose **Accept,** and select the option to **"Create a New Project".** This creates a new project container number for the Territory Rep and copies key project information (including notes and shared documents) from the Spec Rep's project container. Now, both Spec and Territory Rep can collaborate from the same shared Project Container in Agile.

Most Common Issues and Questions:

A. How does a Territory Rep know if they have pending spec registration requests?

Territory Reps receive an email notification of new spec registration requests. In addition, an alert icon will be displayed on the project container toolbar.

Territory Rep Pending Spec Registration Request Notification

B. When receiving a spec registration, how does the Territory Rep know if they already have an existing project container for same project?

Recommended Best Practice: Once TR chooses to accept the registration, they should select "Link to existing project" FIRST - and then use the Quick Search dialogue box to find possible project matches. Following this sequence minimizes the potential for duplicate project containers to ensure proper commission splits are automatically applied to the order.

Accepting/Linking a Registration

Basic Operations: Disputing/ Negotiating/ Escalating a Registration

1. If Territory Rep does not concur with the Spec Registration, they can choose to **Dispute**. A dialogue box appears and requires the TR to add a reason for disputing. The **Dispute** and reason are sent back to the Spec Rep in Agile via email (reason can also be found in Agile).
2. If Territory Rep needs additional time or information, or takes issue with specific details about the registration (for example the requested split %), they can choose **Under Review** and specify in the dialogue box why they did not accept and/or what they need from the Spec Rep.
3. Once the Spec Rep submits a registration, they always have the option to **Resubmit** if they are asked to change or add something to their original submittal. (Note: SR cannot resubmit once a registration has been accepted or escalated). Once resubmitted, the TR still has the same options to Accept, Dispute or select Under Review.
4. If the TR and SR cannot come to agreement, the SR has the option to **Escalate** the spec registration to Acuity Sales management. Once a spec registration is escalated, it goes into a work queue for the VP Spec Sales to review and follow up with both Reps to resolve.
5. VP Spec Sales engages SSM and RVP to resolve as needed.

Most Common Issues and Questions:

A. Why would Spec Reps use the **Resubmit** function?

Common reasons include:

(1) to add additional information or documentation requested by TR

(2) to change requested split % as negotiated with TR

Resubmitting will alert the TR with an automatic email and text comments will be visible inside Agile project container (by clicking yellow note icon next to approval status).

Resubmit registration

B. What to do if spec registration is ignored by TR?

We recommend taking several actions before Escalation. This is important to minimize the backlog and time-lag for resolving escalations.

(1) SR can Resubmit spec reg to TR in case it got lost initially

(2) SR can contact TR via email to follow up

(3) SR can engage Acuity SSM and request Territory SSM to follow up with TR

C. When to **Escalate** the spec registration?

If after resubmitting and other attempts to resolve, Reps still cannot agree on a spec registration, it is time to Escalate.

Basic Operations: Determining Approval Status and Project Phase

1. At any time in the process, the Spec Rep can go into Agile and determine the Approval Status of the Spec Registration. If the Spec Registration has been accepted, the Spec Rep can view the current phase of the project.

   Spec Registration Approval Status indicators are as follows:
   - Submitted
   - Resubmitted
   - Accepted
   - Disputed
   - Under Review
   - Escalated

2. Project Phase is shown in Agile under the General Tab for each project container. *Major* Project Phase indicators are as follows:
   1. Design Development (DD) (spec registration is submitted)
   2. Bid (project is quoted)
   3. Ordered (quote is converted to order)

Most Common Issues and Questions:

A. Where do I go to find registration approval status, and after registration is accepted and linked, where do I find the current project phase?

Both approval status and project phase can be accessed two ways in Agile:
- *searching for project container by job name or TR number under "spec registration search"*
  Search Spec Registration Search
- *Agile dashboard called Agency Registered Specs View*
  Spec Rep Dashboard View

Basic Operations: Matching Orders/ Manual Corrections

1. **Matching Orders** - There are times when Acuity must do research to match orders to spec registrations. We have a variety of methods to search orders to find matches that correspond to project information and specification documentation – most commonly fixture schedules. We always try to confirm order matches with the TR before taking action on commission splits.
2. **Manual Corrections** – Once orders are entered and any order line is released, the TR cannot add commission splits to an order for a spec registration (or anything else) in Agile. When spec registrations are accepted and both SR and TR are using the same project container, Agile automatically adds commission splits to the orders (**caveat - provided no order lines in the shared container have been released). *Note: we have numerous situations where commission splits are not automatically added and TRs did not add them manually.* In these cases, we work with Acuity Accounting to make commission corrections retro-actively, based on the proper specification commission splits.

Most Common Issues and Questions:

A. How to initiate an order search/ Manual Correction with Sales Registration OPS
   - *What we need to search? Job name, job address, estimated order shipment date (range), ordering Rep, fixture schedule, spec registration PC number*
   - *How far back to search? As a general rule, we do not look for orders greater than 12 months past shipment.*

   Once matching orders are found, Sales OPS confirms project with Territory Rep. Once confirmed, if any TR order lines have shipped, we determine appropriate commission splits and process Manual Correction through Accounts Payable.

   Sometimes the TR realizes an order was already placed (activated) prior to accepting or linking the incoming registration. In these cases, we will need to process a manual correction for that order

C. How do we communicate Manual Corrections

   All manual corrections are confirmed via email to both SR and TR. Note: we do not communicate commission $$. That comes from accounting and can be found in Agile by Rep.
   agile Payment Tool for Manual Adjustments

Basic Operations: Reconciling Project Orders & Commission Splits

There are numerous options for Spec Reps to reconcile that (1) the project they registered was won by the Territory Rep, (2) the order was entered and (3) their due specification commission split was paid. *Reconciling Split Commissions in agile (July 2019)*

1. In Agile:
   - *Project Container/Orders Tab*
   - *Payment Application/Post Sales Tab*
   - *Payment Application/Invoice Tab – "Manual Corrections"*
   - *Commission Report (Compensation folder)*

2. Monthly Spec Sales ORDERS Report: This monthly report sent by Sales OPS is sorted by region and by agency to summarize registered specs that have been converted to orders by Territory Reps. It will contain key information such as job name, order DSP (less overage) and the date the order was entered. This will enable SSMs to notify their Spec Reps proactively that their registered specs have been converted to orders and when they should be looking for their due commission splits in Agile

Most Common Issues and Questions:

A. Why is it important for Reps to follow the Agile Spec Registration Process

Most common ways Reps work outside the Agile spec registration process include:

- *Failing to link containers in Agile*
- *Accepting or Linking containers then using other containers to enter orders (a.k.a. "project C")*
- *Using email or other communications outside Agile to request and add commission splits to orders*

These actions bypass automated processes in Agile and invariably create extra work during the process and reporting gaps after the fact

Impact of reporting gaps to Reps

- *Removes ability of Reps to use Agile reporting tools to reconcile payment*
- *Removes ability of Acuity to assign OOT sales credit to agencies*

Impact of reporting gaps to Acuity

- *SSMs cannot track projects and assist with follow up*
- *Inaccuracy of Process Reports*