Acuity Brands Lighting Inc.

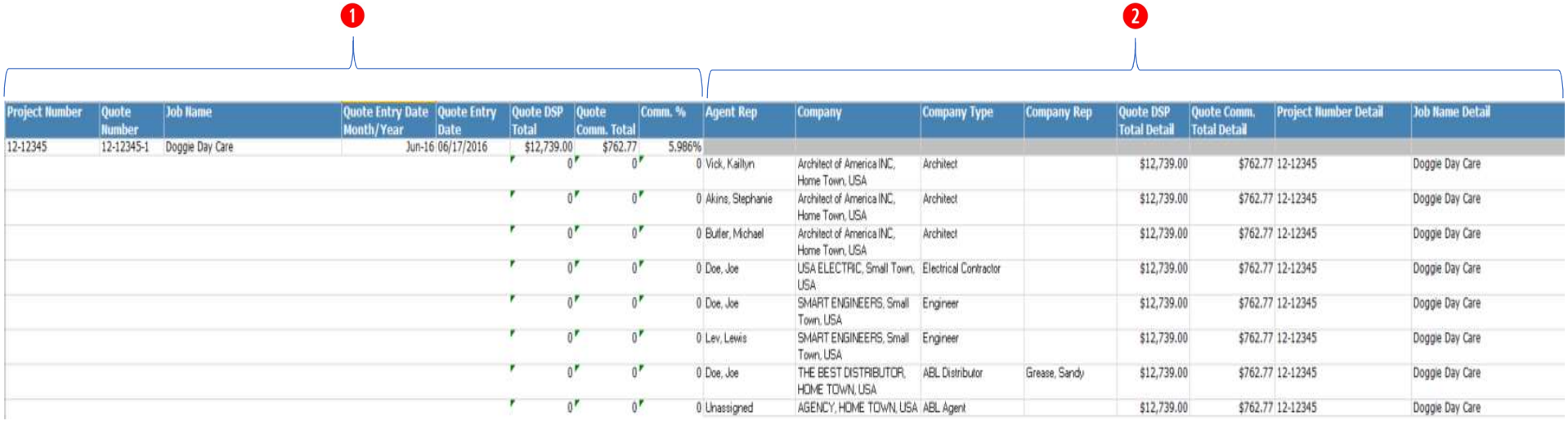
Data Extract Usage Guide

Agile Reporting

Report Descriptions / Functions:

Data Extract – Project Quote and Contacts

- This extact is designed to provide project with active quote dollar totals combined with the individuals selected as contacts within the contacts tab on the project.



Project Number	Quote Number	Job Name	Quote Entry Date Month/Year	Quote Entry Date	Quote DSP Total	Quote Comm. Total	Comm. %	Agent Rep	Company	Company Type	Company Rep	Quote DSP Total Detail	Quote Comm. Total Detail	Project Number Detail	Job Name Detail
12-12345	12-12345-1	Doggie Day Care	Jun-16	06/17/2016	$12,739.00	$762.77	5.986%								
					0	0	0	Vick, Kaillyn	Architect of America INC, Home Town, USA	Architect		$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Akins, Stephanie	Architect of America INC, Home Town, USA	Architect		$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Butler, Michael	Architect of America INC, Home Town, USA	Architect		$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Doe, Joe	USA ELECTRIC, Small Town, USA	Electrical Contractor		$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Doe, Joe	SMART ENGINEERS, Small Town, USA	Engineer		$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Lev, Lewis	SMART ENGINEERS, Small Town, USA	Engineer		$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Doe, Joe	THE BEST DISTRIBUTOR, HOME TOWN, USA	ABL Distributor	Grease, Sandy	$12,739.00	$762.77	12-12345	Doggie Day Care
					0	0	0	Unassigned	AGENCY, HOME TOWN, USA	ABL Agent		$12,739.00	$762.77	12-12345	Doggie Day Care

1. Summary Area - This area of the extract provides a single of summary level information related to the project.

2. Details Area - This area provides the Contact relationship that are associated to the project/quote. Information in this area related to the overall project is repeated as details so filtering and further analysis of contacts can be accomplished.

3. The fields for this extract are defined as follows:

Project Number: The project number created at project entry.

Quote Number: The active quote version on the project.

Job Name: The job name assigned to the project.

Quote Entry Date Month/Year: The long name version of the Month and the four-digit version of the year in which the active quote was entered.

Quote Entry Date: The short date numerical version of the date.

Quote DSP Total: The DSP Dollar total on the active quote version of the project.

Quote Comm. Total: The total commission dollars on the active quote version of the project.

Comm %: The commission percentage of the total active quote version.

Agent Rep: The individual working within the agency that has been assigned the project in the contacts tab.

Company: The name of an external company that has been assigned to the project in the contacts tab.

Company Type: The description of the company function that has been assigned to the project in the contacts tab.

Company Rep: The name of the individuals at the external company that has been assigned to the project in the contacts tab.

Quote DSP Total Detail: The DSP Dollar total on the active quote version of the project. This is included in the details section on each line for total project information in correlation to the specific contact.

Quote Comm. Total Detail: The total commission dollars on the active quote version of the project. This is included in the details section on each line for total project information in correlation to the specific contact.

Project Number Detail: The project number created at project entry. This is included in the details section on each line for total project information in correlation to the specific contact.

Job Name Detail: The job name assigned to the project. This is included in the details section on each line for total project information in correlation to the specific contact.

Report Descriptions / Functions:

Data Extract – Project Quote Base

- This extact is designed to provide project quote line details based on the project entry date and the active quote version.

Project Number	Active Quote Number	Job Name	Quote Entry Date	Project Creation Date	Project Phase Desc	Project Priority	Project Status Desc	Project Reason Lost	Quote Person	Manufacturer Name	Project Region	Part Number	Product Description	Project Type	Project Creation Date	Version 0 Entry Date	Quote Note	Extended Dollars Quote EDT Lines	Additional Charges Quote EDT Lines	Est Project Amount Quote EDT Lines	Extended Commission Dollars Quote EDT Lines
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*230AYE	2GTL 4 40L EZ1 EL14L LP835	UNK	01/04/2016	01/11/2016	All quotes from	$837.00	$0.00	$0.00	$41.85
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*229YLP	2GTL 4 40L EZ1 LP835	UNK	01/04/2016	01/11/2016	All quotes from	$1,800.00	$0.00	$0.00	$84.40
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	WC387245	AFN BN PREM	UNK	01/04/2016	01/11/2016	All quotes from	$0.00	$0.00	$0.00	$0.00
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*240447	ELA FRK	UNK	01/04/2016	01/11/2016	All quotes from	$60.00	$0.00	$0.00	$4.88
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*240446	ELSQ	UNK	01/04/2016	01/11/2016	All quotes from	$210.00	$0.00	$0.00	$13.52
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary		ICO 40/45 6AR LSS 70D 120 EZB	UNK	01/04/2016	01/11/2016	All quotes from	$3,300.00	$0.00	$0.00	$210.76
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary		ICO 40/60 6AR LSS 70D 120 EZB	UNK	01/04/2016	01/11/2016	All quotes from	$5,920.00	$0.00	$0.00	$376.16
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*300905	ISD BC 120/277 WH M10	UNK	01/04/2016	01/11/2016	All quotes from	$0.00	$0.00	$0.00	$0.00
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*231TGF	LBL4 40L EZ1 LP840	UNK	01/04/2016	01/11/2016	All quotes from	$198.00	$0.00	$0.00	$9.90
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	ACUITY BRANDS	Primary	*186HU9	LHQM LED R M6	UNK	01/04/2016	01/11/2016	All quotes from	$414.00	$0.00	$0.00	$21.30
12-12345	12-12345-1	Doggie Day Care	06/17/2016	01/04/2016	Ordered	B Multi-name	Won		Doe, Jason	UNKNOWN	Primary	UNKNOWN	UNKNOWN	UNK	01/04/2016	01/11/2016	All quotes from	$0.00	$0.00	$0.00	$0.00

1. The fields for this extract are defined as follows:

Project Number: The project number created at project entry.

Active Quote Number: The active quote version on the project.

Job Name: The job name assigned to the project.

Quote Entry Date: The short date numerical version of the date.

Project Creation Date: The short date numerical version of the date the project was created.

Project Phase Dec: The description of the phase that the project is currently in.

Project Priority: This is the current priority selected on the project in the general tab.

Project Status Desc: This is the description of the current status of the project in the general tab.

Project Reason Lost: This is the description of the current reason of loss of the project in the general tab.

Quote Person: This is the person that created the active version of the quote for the project.

Manufacture Name: This is the manufacture name on the line item in the active version of the quote for the project.

Project Region: This is the project region selected from the general tab of the project.

Part Number: This is a unique identifier for the product on the active quote line of the project. For ABL items, this is the cicode.

Product Description: This is the description of the product on the active quote line of the project that is represented by the part number. For ABL items, this the products nomenclature.

Project Type: This is the description of the type of project selected in the general tab.

Version 0 Entry Date: The is the entry date of the Version 0 quote for the project.

Quote Note: This is the quote note entered on the active version of the quote.

Extended Dollars Quote EDT Lines: This is the DSP dollars times the order quantity on the active version of the quote for the line item.

Additional Charges Quote EDT Lines: This is dollars associated beyond the selling price of the line item times the quantity ordered on the active version of the quote.

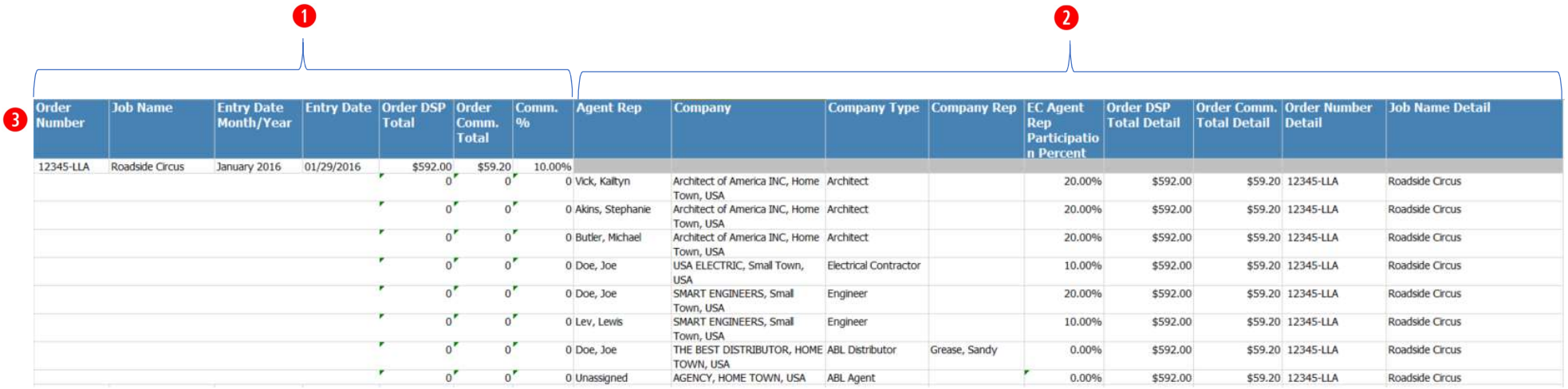
EST Project Amount Quote EDT Lines: This is the estimated project amount for the line items on the active version of the quote.

Extended Commission Dollars Quote EDT Lines: This is the dollar amount of commission on the line item of the active version of the quote times the ordered quantity.

Report Descriptions / Functions:

Data Extract – Orders and Contacts

- This extact is designed to provide order total dollar information combined with the individuals selected as contacts within the contacts tab on the order.



Order Number	Job Name	Entry Date Month/Year	Entry Date	Order DSP Total	Order Comm. Total	Comm. %	Agent Rep	Company	Company Type	Company Rep	EC Agent Rep Participation Percent	Order DSP Total Detail	Order Comm. Total Detail	Order Number Detail	Job Name Detail
12345-LLA	Roadside Circus	January 2016	01/29/2016	$592.00	$59.20	10.00%									
				0	0	0	Vick, Kaitlyn	Architect of America INC, Home Town, USA	Architect		20.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Akins, Stephanie	Architect of America INC, Home Town, USA	Architect		20.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Butler, Michael	Architect of America INC, Home Town, USA	Architect		20.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Doe, Joe	USA ELECTRIC, Small Town, USA	Electrical Contractor		10.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Doe, Joe	SMART ENGINEERS, Small Town, USA	Engineer		20.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Lev, Lewis	SMART ENGINEERS, Small Town, USA	Engineer		10.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Doe, Joe	THE BEST DISTRIBUTOR, HOME TOWN, USA	ABL Distributor	Grease, Sandy	0.00%	$592.00	$59.20	12345-LLA	Roadside Circus
				0	0	0	Unassigned	AGENCY, HOME TOWN, USA	ABL Agent		0.00%	$592.00	$59.20	12345-LLA	Roadside Circus

1. Summary Area - This area of the extract provides a single of summary level information related to the order.

2. Details Area - This area provides the Contact relationship that are associated to the order. Information in this area related to the overall order is repeated as details so filtering and further analysis of contacts can be accomplished.

3. The fields for this extract are defined as follows:

Order Number: This is the order that is designed to the specific order.

Job Name: This is the job name assigned to the order.

Entry Date Month/Year: The long name version of the Month and the four-digit version of the year in which the active quote was entered.

Entry Date: This is the short form numeric date for the day the order was entered.

Order DSP Total: This is the total DSP dollars for the complete order.

Order Comm. Total: This is the total commission dollars for the complete order.

Comm %: This is the total commission percentage for the complete order.

Agent Rep: The individual working within the agency that has been assigned the order in the contacts tab.

Company: The name of an external company that has been assigned to the order in the contacts tab.

Company Type: The description of the company function that has been assigned to the order in the contacts tab.

Company Rep: The name of the individuals at the external company that has been assigned to the order in the contacts tab.

EC Agent Rep Participation Percentage: The employee credit participation percentage that is assigned to an individual within the contacts tab of the order

Order DSP Total Detail: This is the total DSP dollars for the complete order. This is included in the details section on each line for total order information in correlation to the specific contact.

Order Comm. Total Detail: This is the total commission dollars for the complete order. This is included in the details section on each line for total order information in correlation to the specific contact.

Order Number Detail: This is the order that is designed to the specific order. This is included in the details section on each line for total order information in correlation to the specific contact.

Job Name Detail: The job name assigned to the order. This is included in the details section on each line for total order information in correlation to the specific contact.

Report Descriptions / Functions:

Data Extract – Orders Base

- This extact is designed to provide order line level details based on order entry date.

The below area has been broken into two sections to provide all headers. We will refer to them as Section 1 and Section 2

1

Entry Date	Ship Date	Order #	Job Name	Salesman #	Distributor PO Number	Contractor PO Number	Entered By User Name	Project Number	Manufacturer Name	Type of Construction	ABL Construction Category	ABL Construction Detail Category	Value Stream	Product Division
01/29/2016	02/09/2016	12345-LLA	Roadside Circus	172	S0971263		Montgomery, Elizabeth	111112	ACUITY BRANDS	PROJECT - NEW CONSTRUCTION	RETAIL	STORES	VALUE LUMINAIRES (GRP-2000)	COMMERCIAL INDOOR VALUE LUMINAIRES (DIV-
01/29/2016	02/09/2016	12345-LLA	Roadside Circus	172	S0971263		Montgomery, Elizabeth	111112	ACUITY BRANDS	PROJECT - NEW CONSTRUCTION	RETAIL	STORES	VALUE LUMINAIRES (GRP-2000)	COMMERCIAL INDOOR VALUE LUMINAIRES (DIV-

2

Part Number	Product Description	National Account	Customer Name	Customer Name	End Use	Order Type	Line Status Code	Prod Approval	Project #	Qty.	Ext. DSP	Ext. Comm.	Comm. %
*224GPA	2FSL2 33L EZ1 LP835	NO NATIONAL ACCOUNT	THE BEST DISTRIBUTOR	THE BEST DISTRIBUTOR - 111000 HOMETOWN	JOB	ABL	BIL	APP	111112	2	$296.00	$29.60	10%
*228N1G	2FSL4 30L EZ1 EL7L LP835	NO NATIONAL ACCOUNT	THE BEST DISTRIBUTOR	THE BEST DISTRIBUTOR - 111000 HOMETOWN	JOB	ABL	BIL	APP	111112	4	$296.00	$29.60	10%

1 The field in this section of the extract are defined as follows:

Entry Date: This is the short form numeric date for the day the order was entered.

Ship Date: This is the short form numeric date for the day the order line was shipped.

Order #: This is the order that is designed to the specific order

Job Name: This is the job name assigned to the order.

Salesman #: This is the salesman selected on the order.

Distributor PO Number: This is the distributor purchase order as entered on the order.

Contractor PO Number: This is the contractor purchase order as entered on the order.

Entered By User Name: This is the individual that entered the order.

Project Number: This is the project number that the order originated from.

Manufacture Name: This is the name of the manufacture of the line item on the order.

Type of Construction: This is the type of construction that was selected when the order was entered.

ABL Construction Category: This is the type of construction that was selected when the order was entered.

ABL Construction Category Detail Category: This is the type of construction that was selected when the order was entered.

Value Stream: ABL Only – This is the value stream assigned to the product on the order line.

Product Division: ABL Only – This is the product division assigned to the product on the order line.

2. The fields in this section of the extract are defined as follows:

Part Number: This is a unique identifier for the product on the order. For ABL items, this is the cicode.

Product Description: This is the description of the product on the order that is represented by the part number. For ABL items, this the products nomenclature.

National Account: This is the national account that the order is servicing.

Customer Name: This is the customer that is purchasing the order.

Customer Name Details: This is customer number that is purchasing the order.

End Use: This denotes the end use of the order as either a job or stock order.

Order Type: This is a three-digit code that identified the manufacture of the order line.

Line Status Code: ABL Only – This is a three-digit code that provides the current status of the order line.

Prod Approval: ABL Only – This is a three-digit code that provides the current status of the approval process for the product on the order line.

Qty.: This is the quantity ordered on the order line.

Ext DSP: This is the total amount of the unit distributors selling price times the quantity on the order line.

Ext. Comm: This is the total amount of the commission dollars times the quantity on the order line.

Comm. %: This is the total commission percentage of the order line.