Acuity Brands Lighting

RFA – Modifications

Requester User Guide

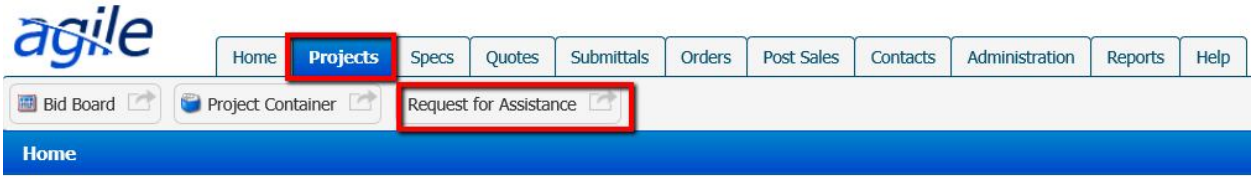
6-3-2019

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Introduction

Request for Assistance is an agile application that is used to ask for specific types of assistance from Acuity. It is located under the Projects tab of agile. If you do not have access your agency agile admin or Acuity Frontline can grant you access.



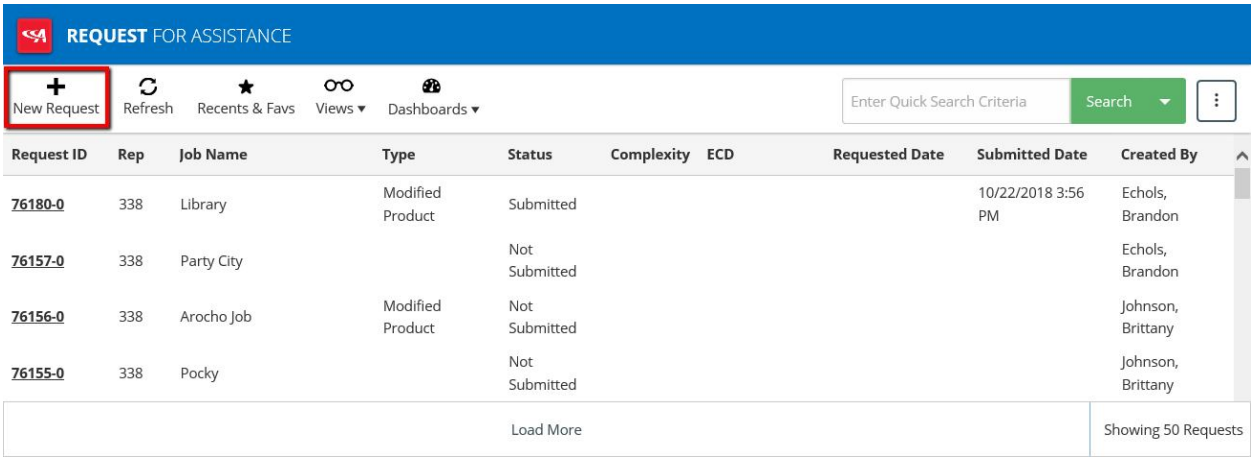
An RFA – Modification Request is a request type that is used to ask Acuity if an existing product can be modified in a certain way. It will also be used to request a custom product from Acuity. It will eventually replace the current RFD (Request for Deviation) tool.

This guide will cover:

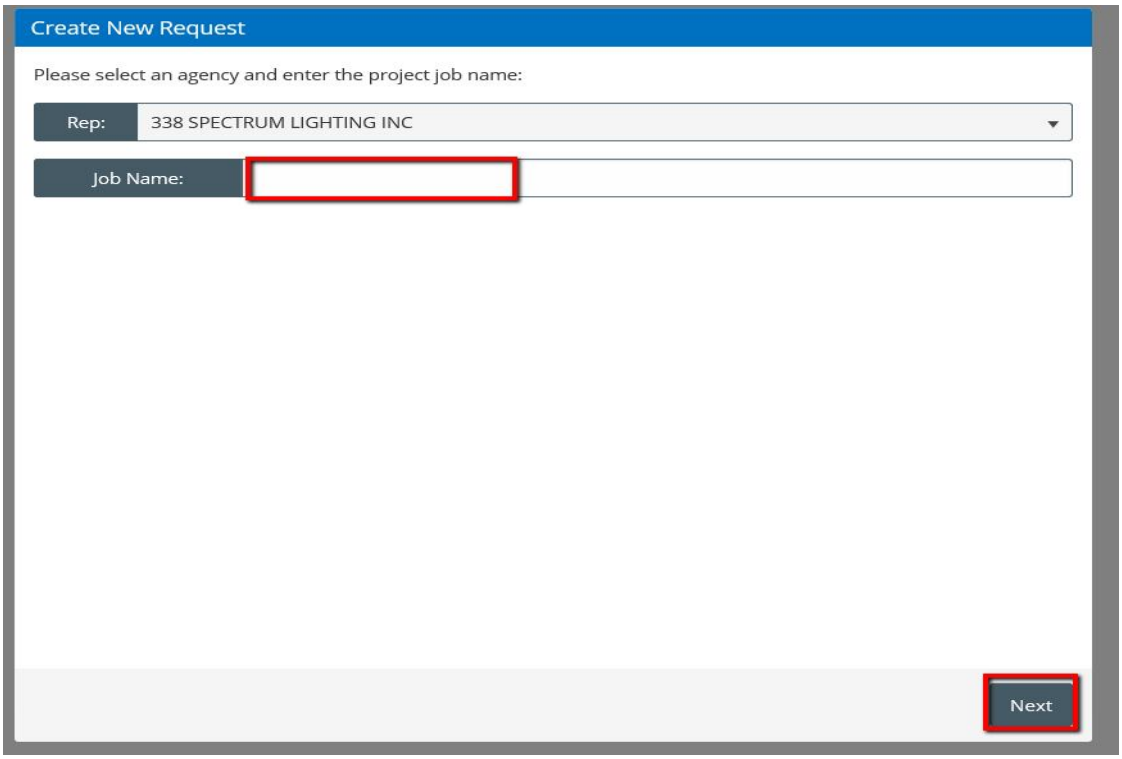
- Creating an RFA
  - Creating an RFA – Modification from the RFA dashboard
  - Creating an RFA - Modification from within an agile project quote
  - Creating an RFA – Modification from within a project container
- Utilizing the Copy function
- Using the RFA Modification dashboard
- Searching (quick search and advanced search) and creating a view
- Notifications
- Reviewing a Processed RFA – Modification request.
- Adding additional modifications to a submitted RFA
- Follow up / escalations

Creating an RFA – Modification from the RFA dashboard

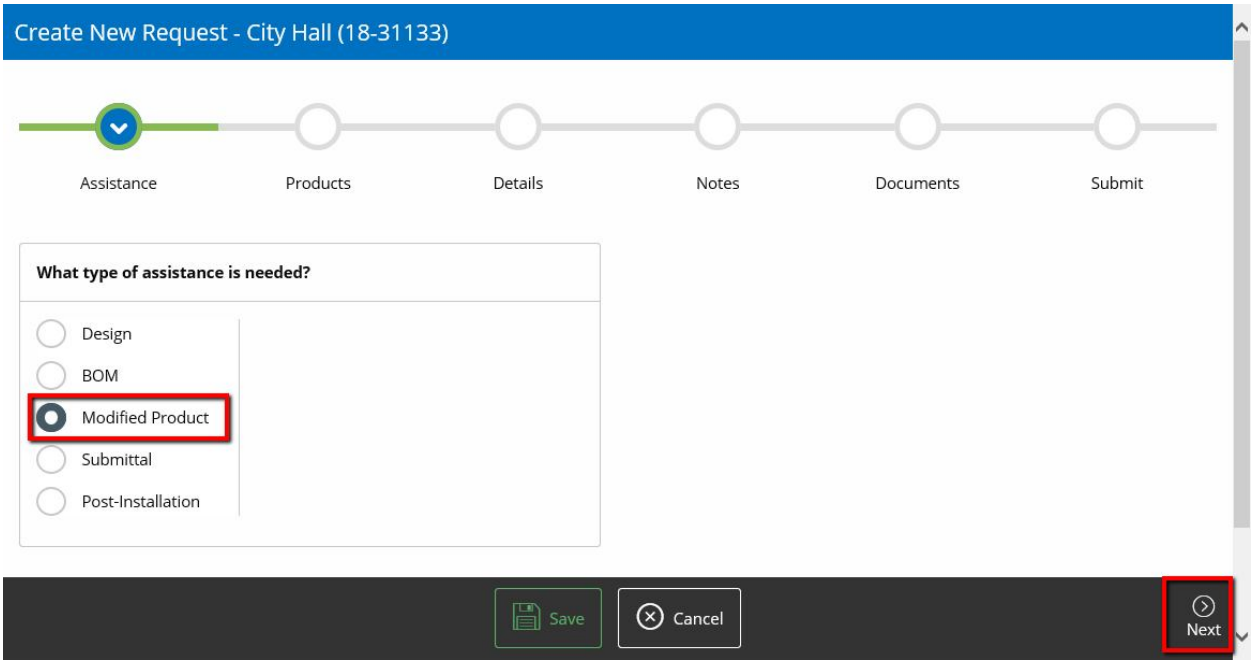
1. Once logged into agile navigate to the RFA dashboard.
2. To create a new request, click the New Request button. You will then be prompted to input a job name. Click Next.



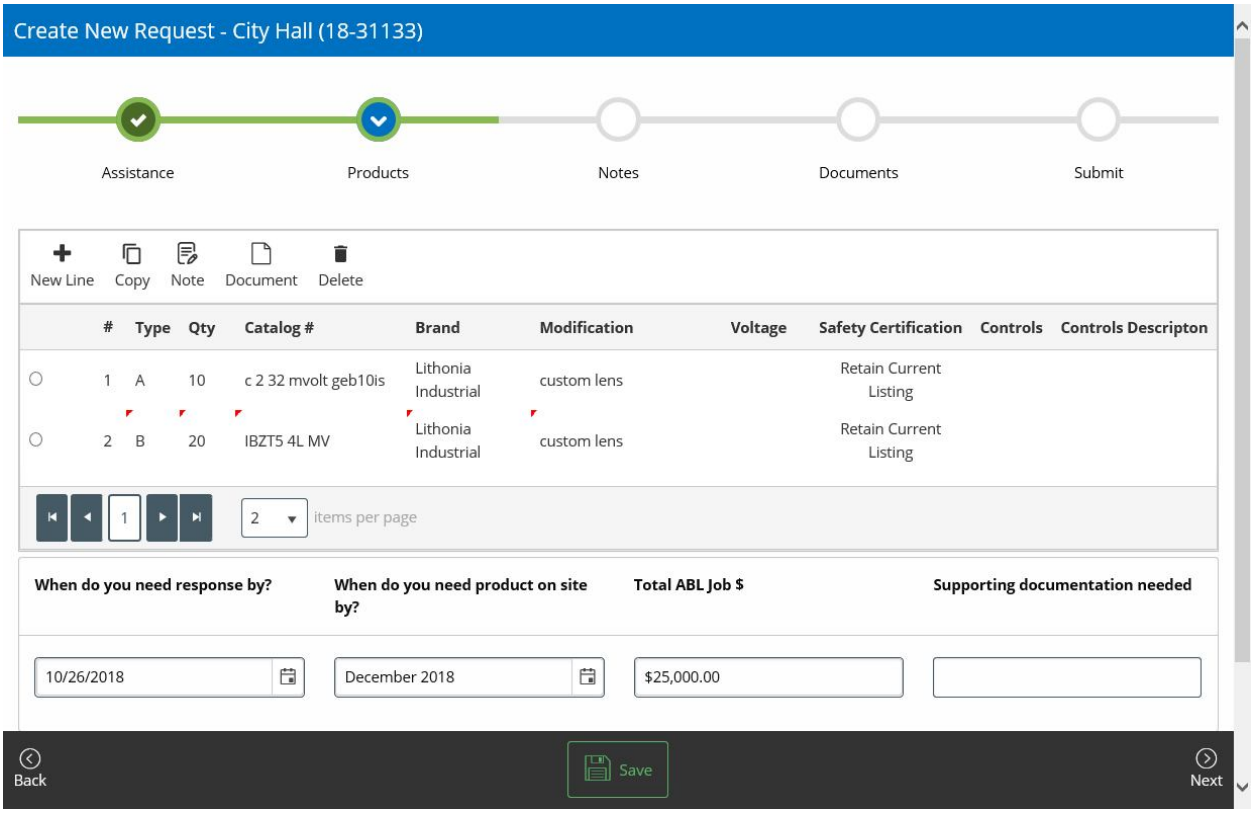
3. It will then search for projects with similar names. Select from the list to associate the project to this Request. Or select create a new project container.



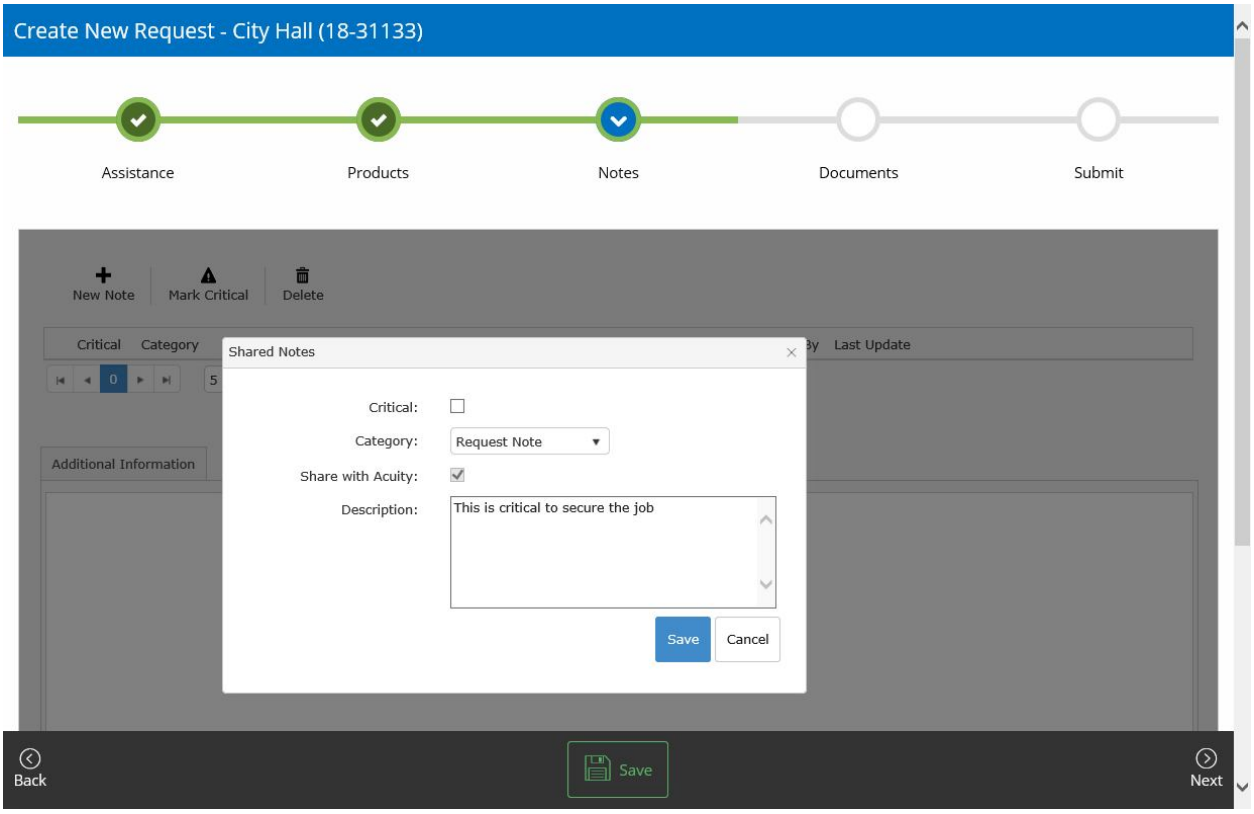
4. You will then be launched into the Request for Assistance Wizard. Select Modified Product as the type of assistance, then click the Next button.



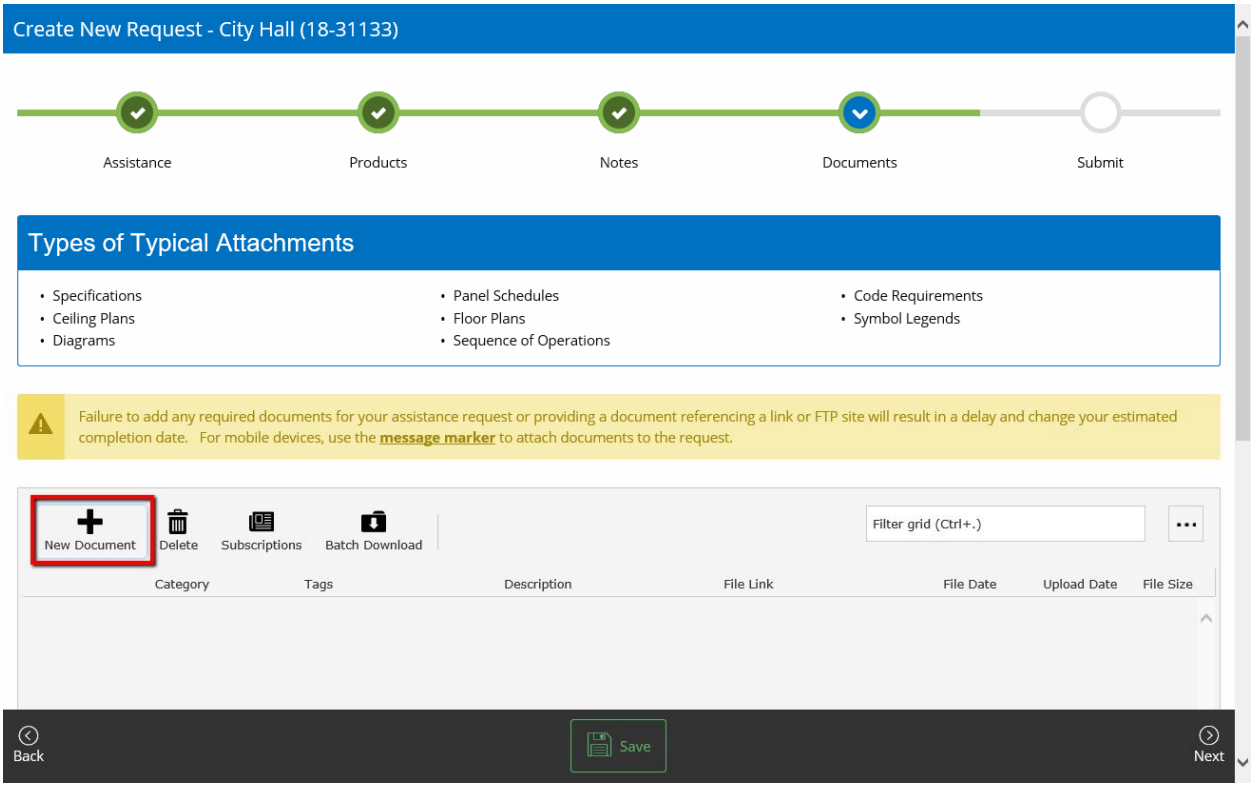
5. You will then be taken to the Products grid. Click New Line to add a new line to the grid (or use the quick key AIt N).
6. Next key in your product. It will start you on Type. You can use the tab key to move right along the grid or shift tab to move left. The required fields are Quantity, Catalog #, Product Group (will auto populate for you if we recognize the series in the catalog #), and Modification. If yes is selected in the controls cell the Controls Description will also be required. Continue this process until all products have been added.
    - We will not accept Reference or "Same As" RFD or MOD #'s in the Modification field unless accompanied by the modification details. If we receive the reference RFD or MOD # only, the Modification request will be denied.
7. Below the grid you will see several additional fields that can be populated. The values in these fields would apply to all products on this request. It's important that they be populated as accurately as possible if this information is available to you.



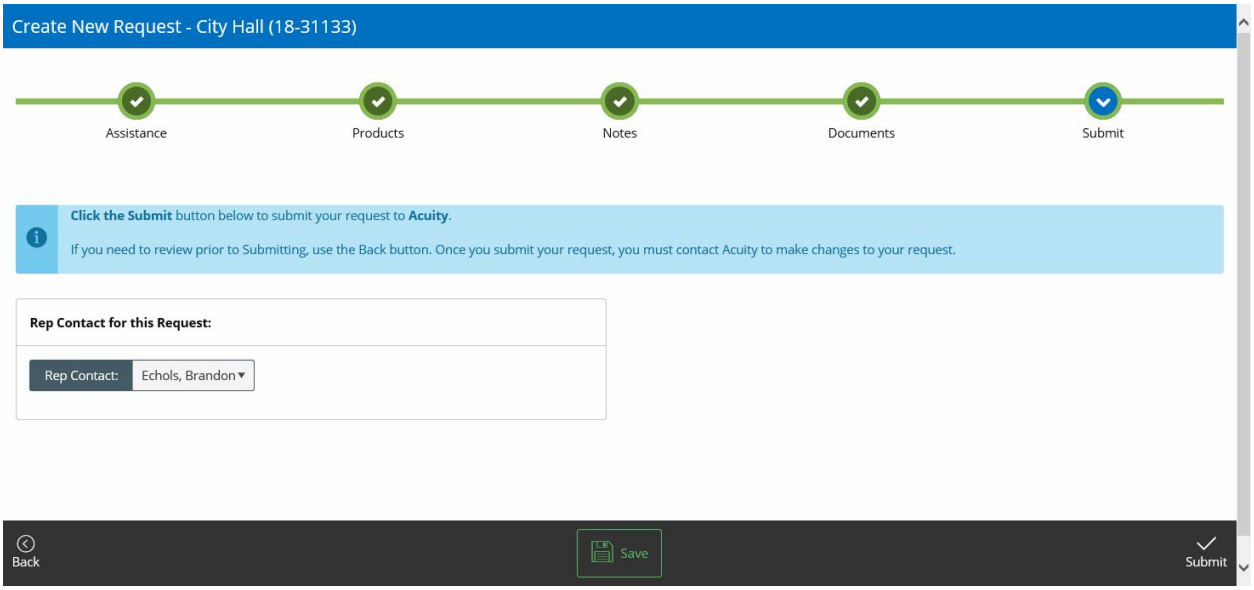
8. Clicking Next will take you to the Notes tab. This is where you will input all notes regarding this request.



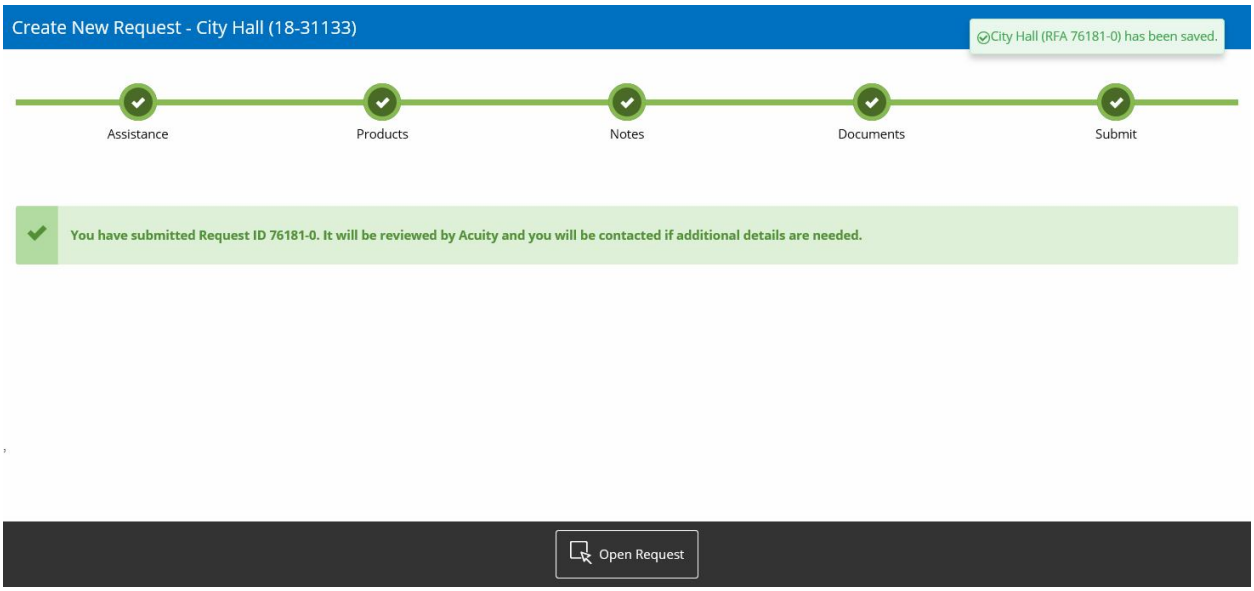
9. Click Next again. Now you will be on the documents tab. This is where you will upload all documents regarding this request. Please note, a competitor spec sheet is required if you are requesting a non-Acuity component i.e. Wattstopper sensor, American cable systems, etc.



10. Click Next to take you to the final screen which is the Submit tab. By default, you will be the Rep Contact but you can change it to someone else in your office.



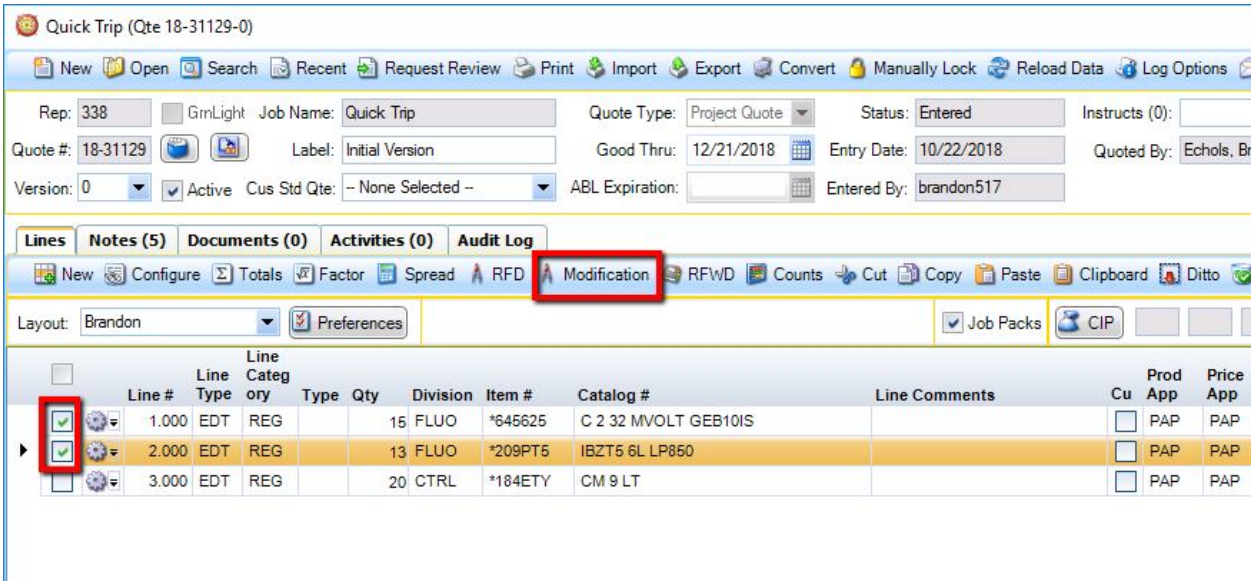
11. Click Submit. A confirmation message will display letting you know the request has been submitted.



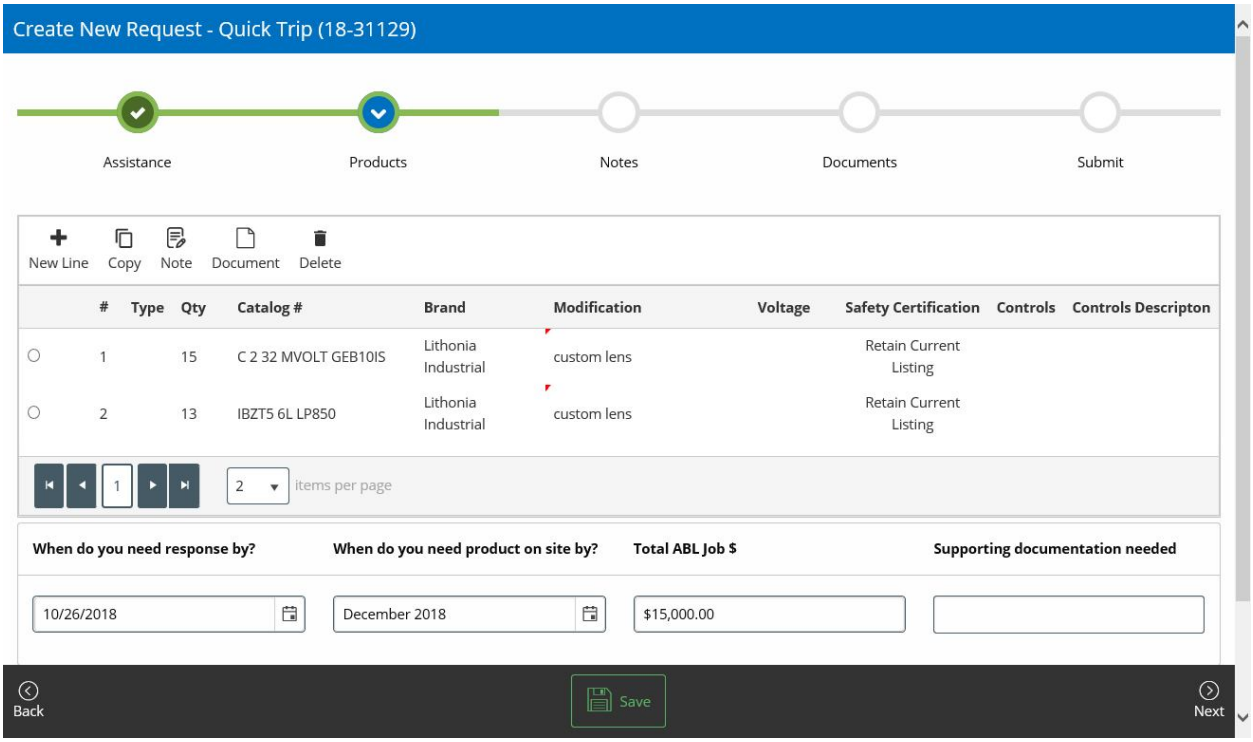
Creating an RFA - Modification from within an agile project quote

1. Open your project quote and navigate to the lines tab.

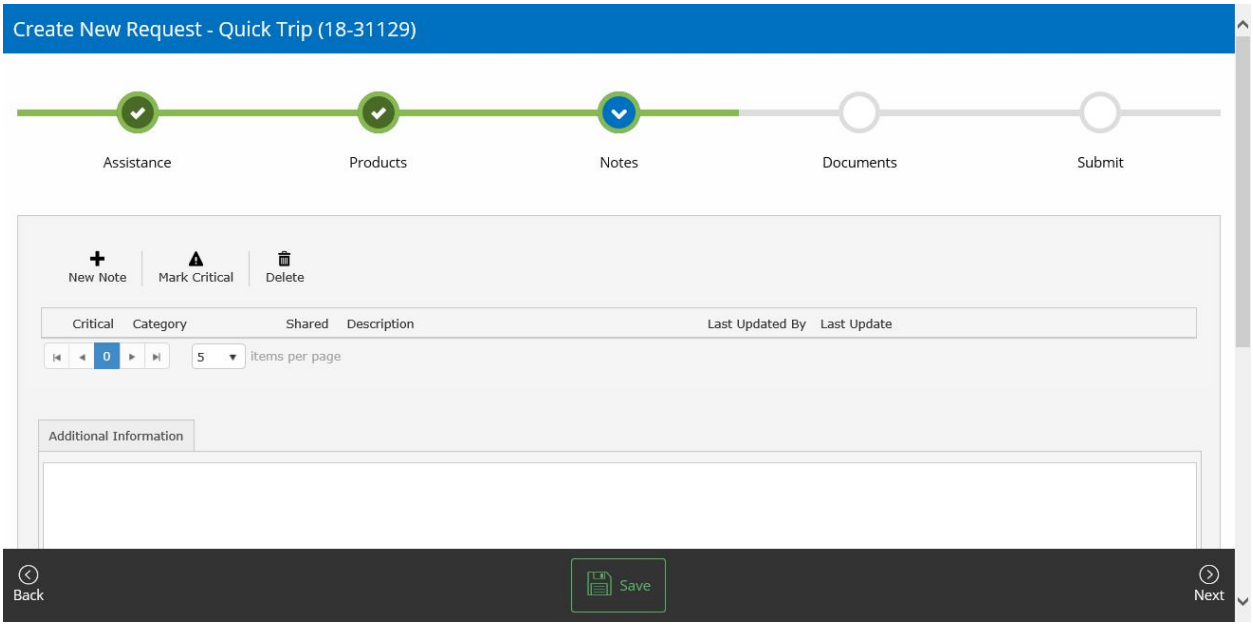
2. Select all lines you wish to create an RFA – Modification request for. Then click the Modification button.



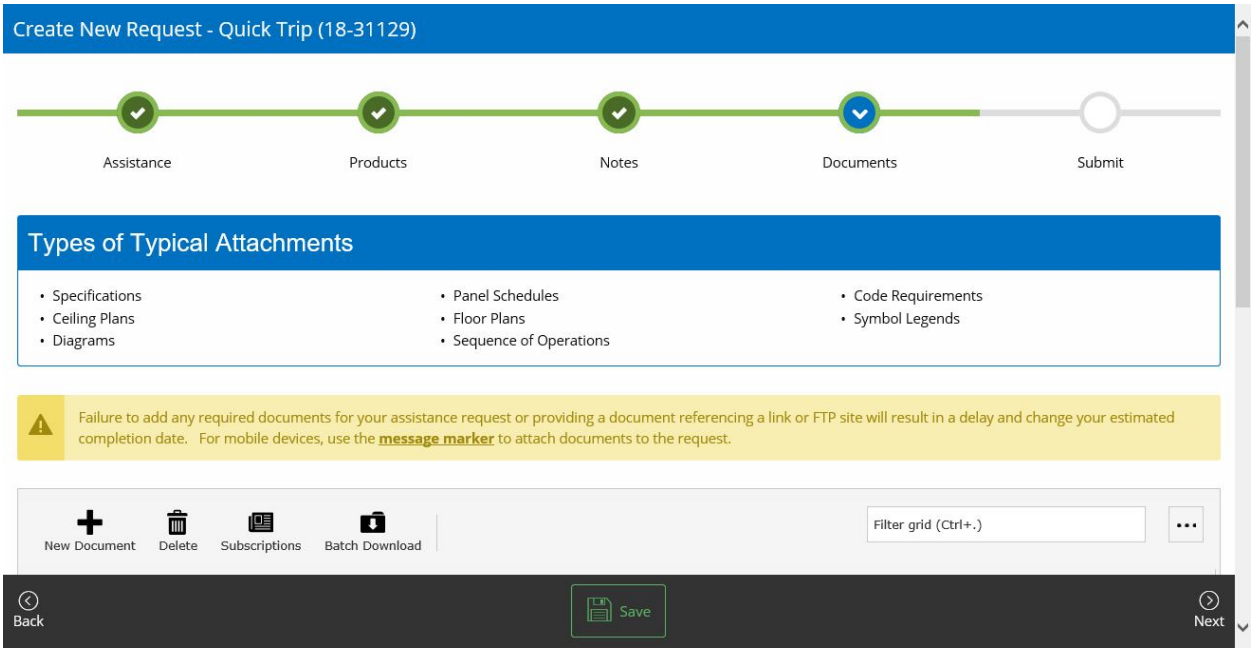
3. The RFA wizard will launch. The selected quote lines should now appear on the products grid in RFA. Quantity, Fixture Type, and Total ABL Quote $ will get carried over from the quote to the RFA modification request. You can modify the form if need be. Input your modification as well as any other fields.



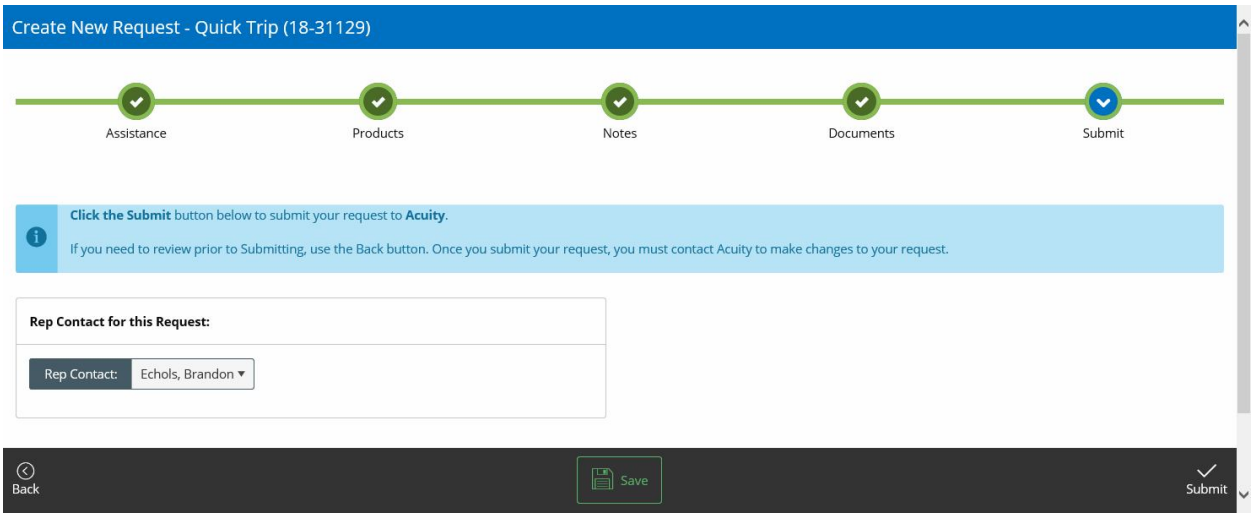
4. Clicking Next will take you to the Notes tab. This is where you will input all notes regarding this request.



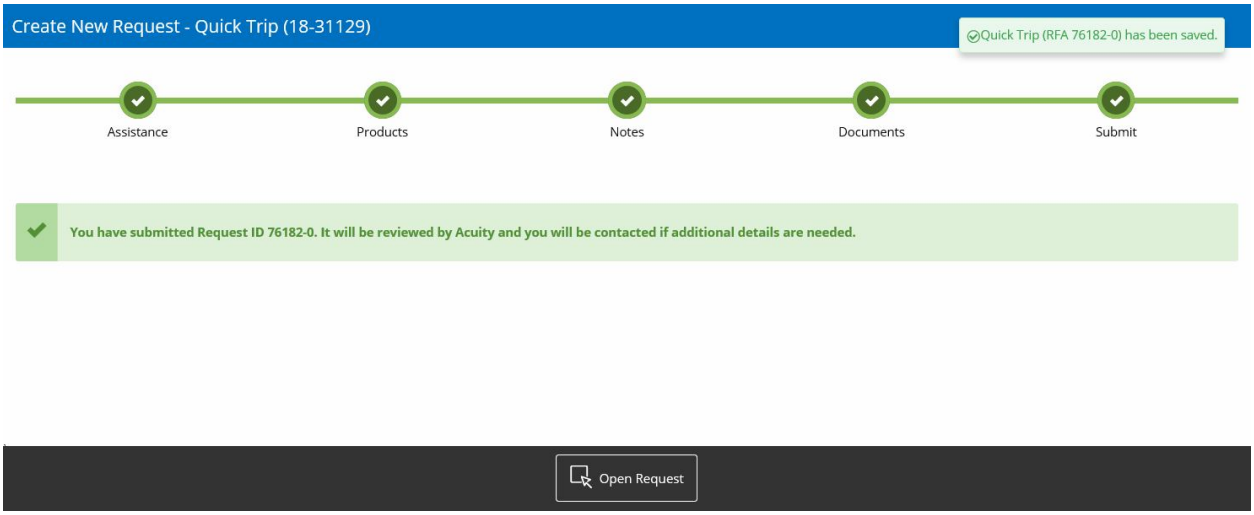
5. Click Next again. Now you will be on the documents tab. This is where you will upload all documents regarding this request. Please note, a competitor spec sheet is required if you are requesting a non-Acuity component i.e. Wattstopper sensor, American cable systems, etc.



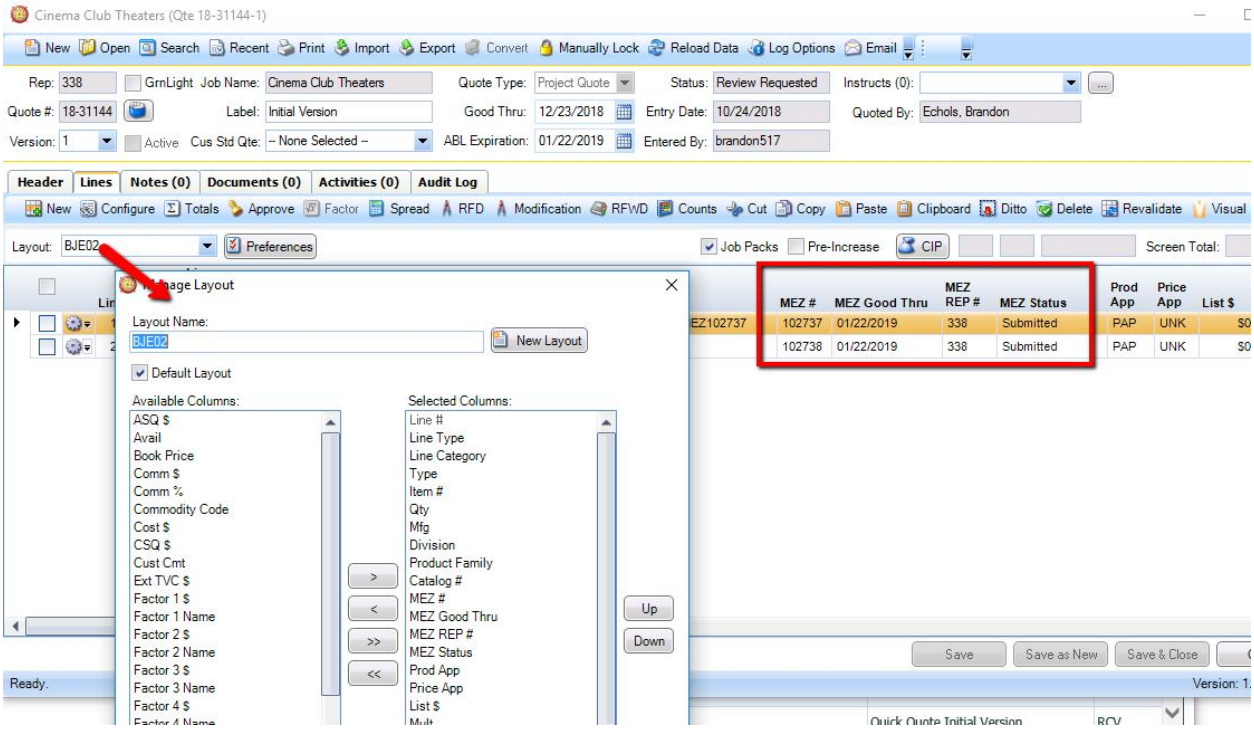
6. Click Next to take you to the final screen which is the Submit tab. By default, you will be the Rep Contact but you can change to someone else in your office.



7. Click Submit. A confirmation message will display letting you know the request has been submitted.

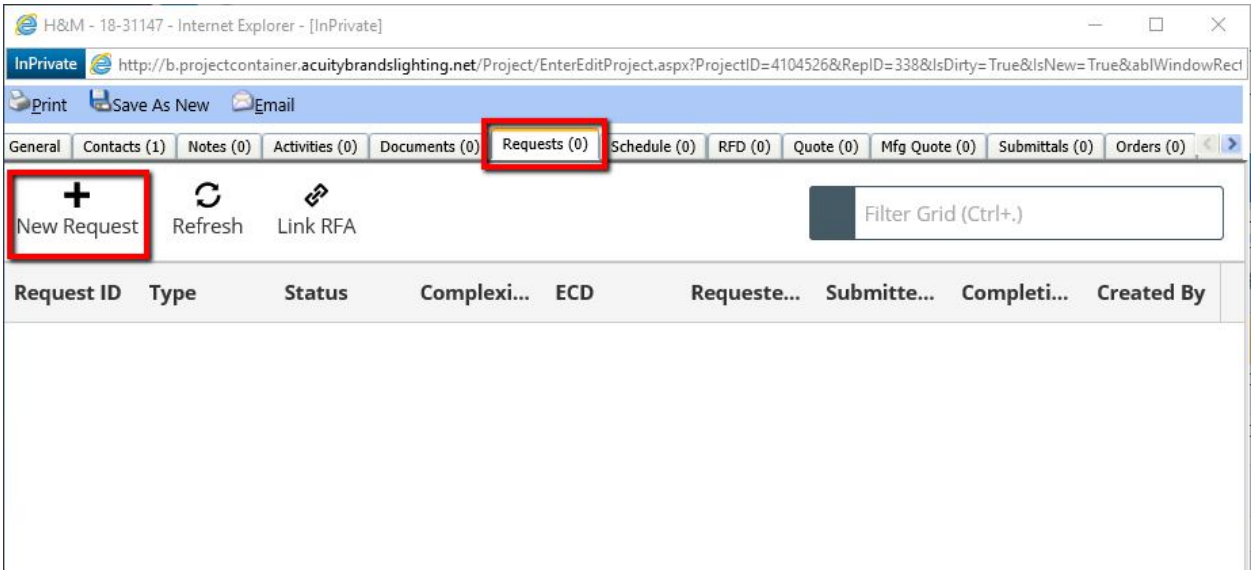


8. When you return to the quote you should now see the MEZ #, MEZ Rep #, MEZ Status, and MEZ good thru date populated. If you haven't already done so you will want to add these column to your quote layout. The MEZ good thru date is the date that modification is good thru. Once we pass the good thru date the MEZ will show a status of Expired and will lose its price approvals. That modification will need to be resubmitted if it is still needed.



Creating an RFA – Modification from within a project container

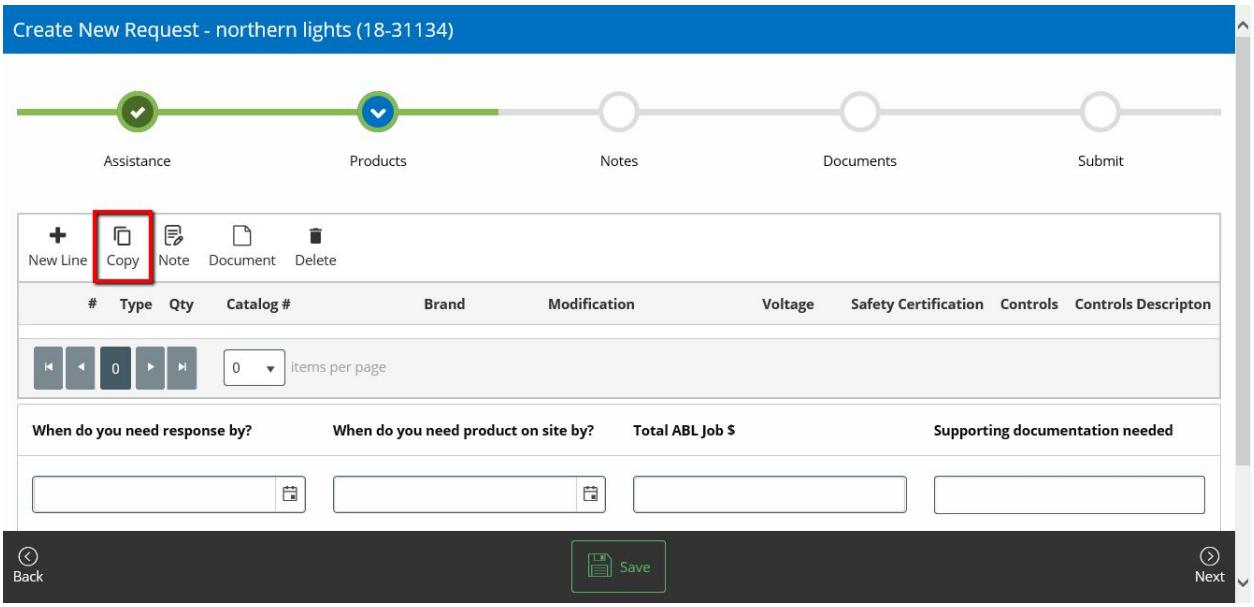
A modification request can also be initiated from within a project container. To do so open the project container, go to the Requests tab, then click New Request. The steps to create the modification are essentially the same as above once the wizard has launched.

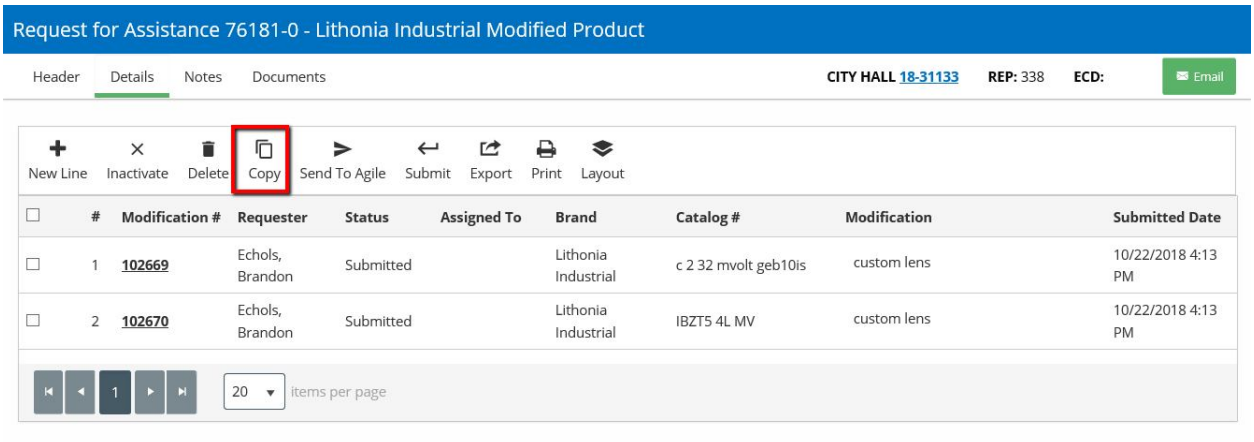


Utilizing the Copy Feature

The Copy function can be found in a couple of different places.

- On the Products tab while you are in the RFA Wizard (not submitted)
- On the Details tab of a submitted RFA.



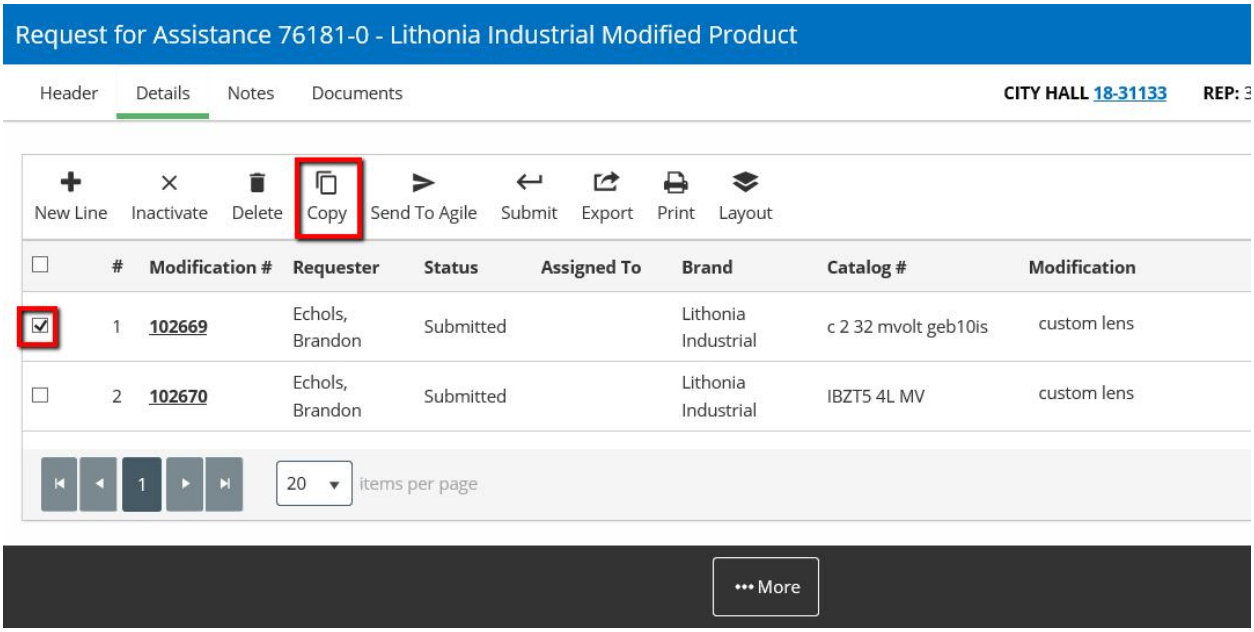


Clicking Copy will prompt you to select a Copy Option. The options are Copy New and Copy To.

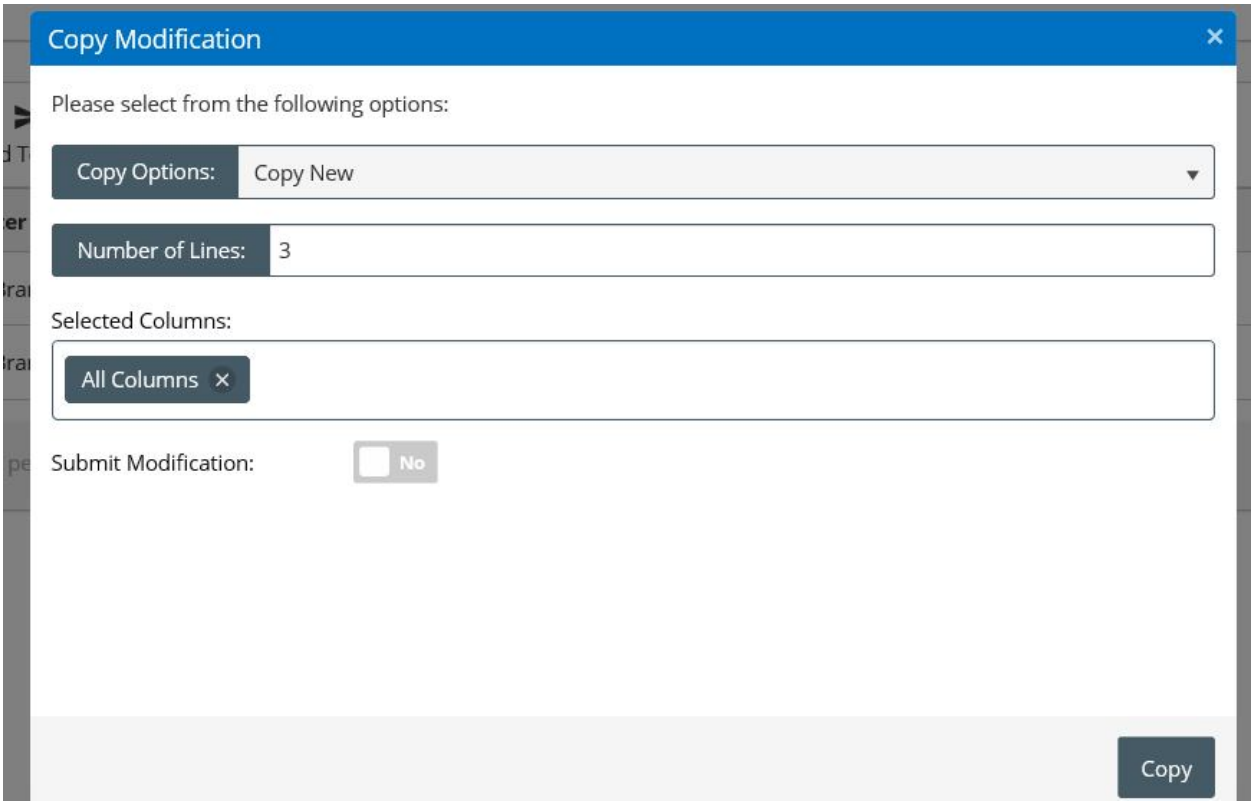
- Copy New allows you to copy an existing modification to a brand-new line.
- Copy To allows you to copy certain values from one modification to another one. Copy To can only be used while you are in the wizard.

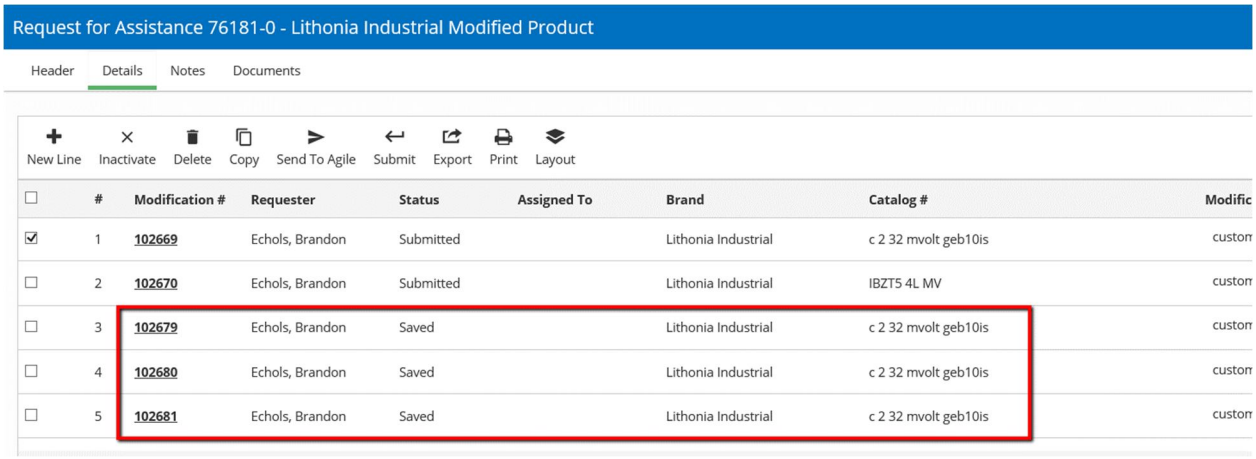
How to Copy New

1. Select the modification you would like to copy.



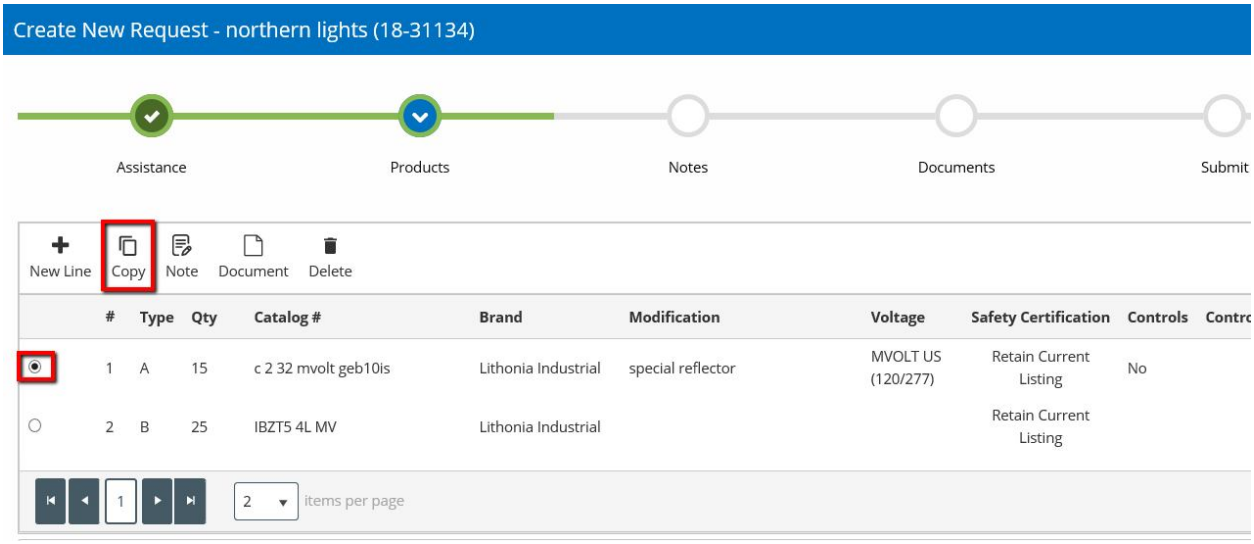
2. Select the Copy New option. Then you will input the number of new lines you want created.
3. Next you will select which columns should be copied over. The available columns to copy are: Type, Qty, Catalog #, Product Group, Modification, Voltage, Safety Certification, Controls, and Controls description
4. Finally, you will designate whether you want to automatically submit this modification upon creation. This will submit the specific modification line to the Acuity team for review.



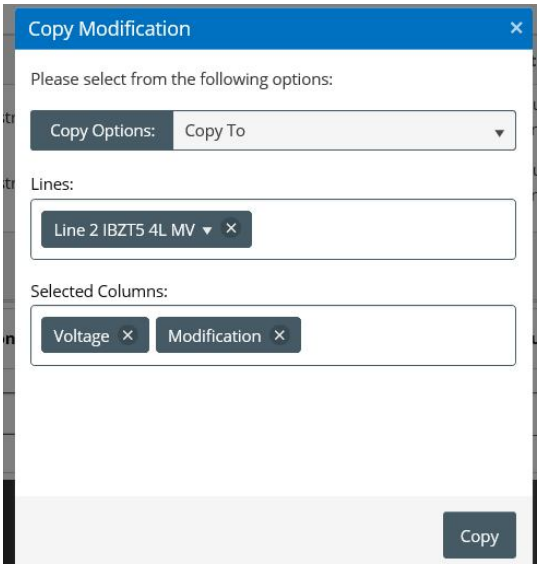


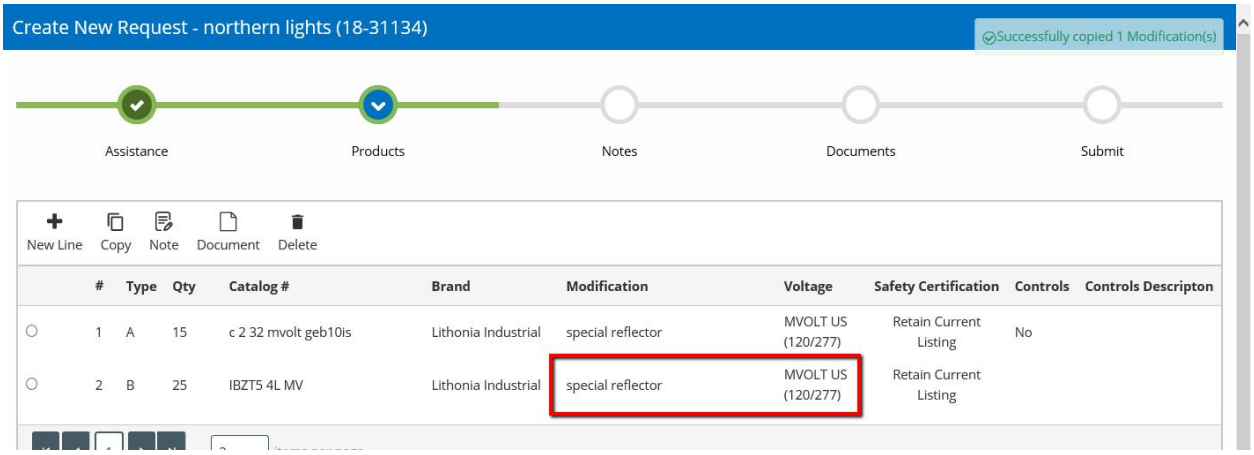
How to Copy To

1. While in the wizard, select which line you want to copy then click Copy.



2. Select Copy To
3. Select which line you want to copy to.
4. Then select which columns you want to copy over.





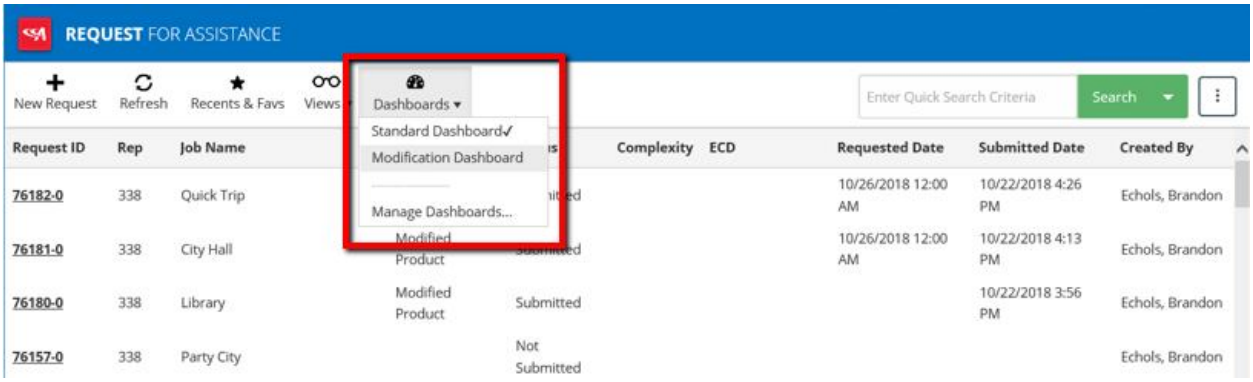
Using the New Modification Dashboard

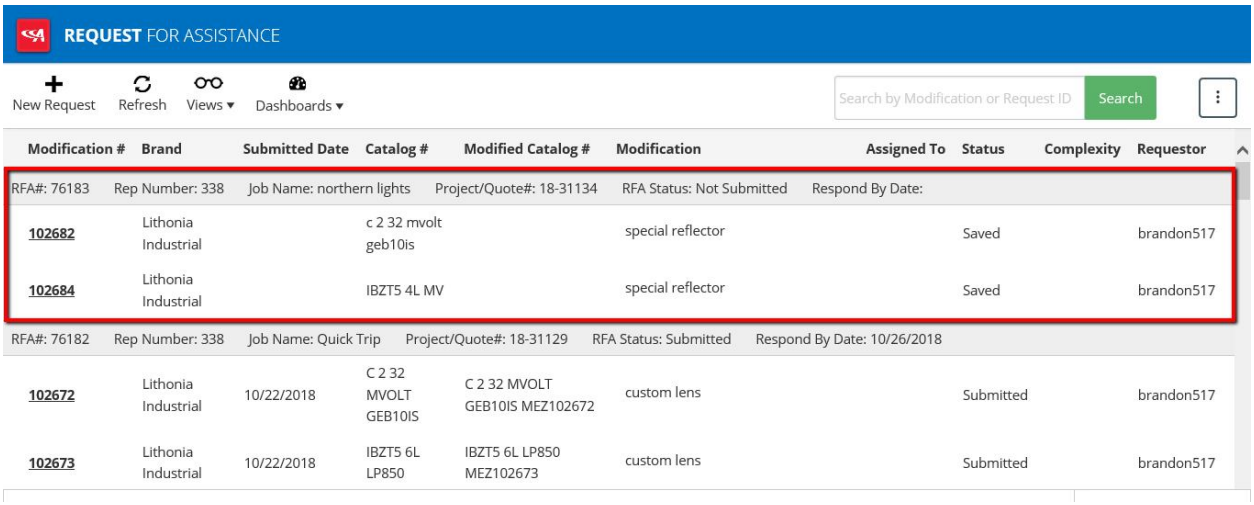
We have created a new dashboard specifically for modification requests that shows more detail than the standard dashboard does. The modification dashboard will show both the RFA header level information as well as each product modification request. Clicking the RFA header row will launch the RFA. Clicking on a modification row will open the modification details form. You can designate which dashboard you want to be your default by selecting Manage Dashboards.

One of the columns in your dashboard view is Modification Status.

- Saved: This means the modification has been created and saved but not yet submitted to Acuity.
- Submitted: Indicates that the modification has been submitted to Acuity.
- In Progress: The modification is under review.
- Needs Clarification: The Acuity team has sent the modification back to you and needs additional information or clarification to complete the review – no additional action will be taken by Acuity until the requested information is provided.

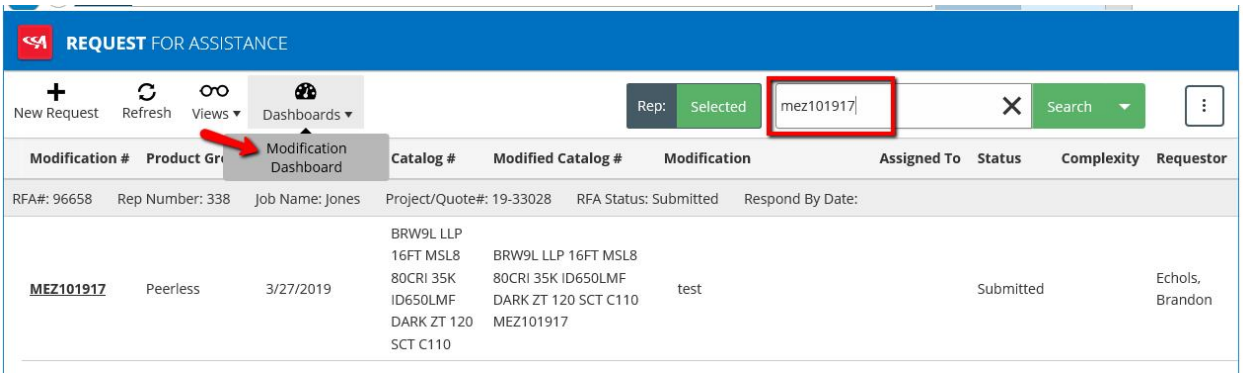
- Standard Product: This means we have a standard product that will fit your need and a modification is not needed. The Acuity team will provide the standard product nomenclature to be used for quoting and ordering.
- Denied: The requested modification is not feasible.
- Approved: The modification request has been approved and can now be quoted and ordered.
- Resubmitted: This status will occur when you resubmit a modification back to the Acuity team.
- Inactivated: The modification has been made inactive.



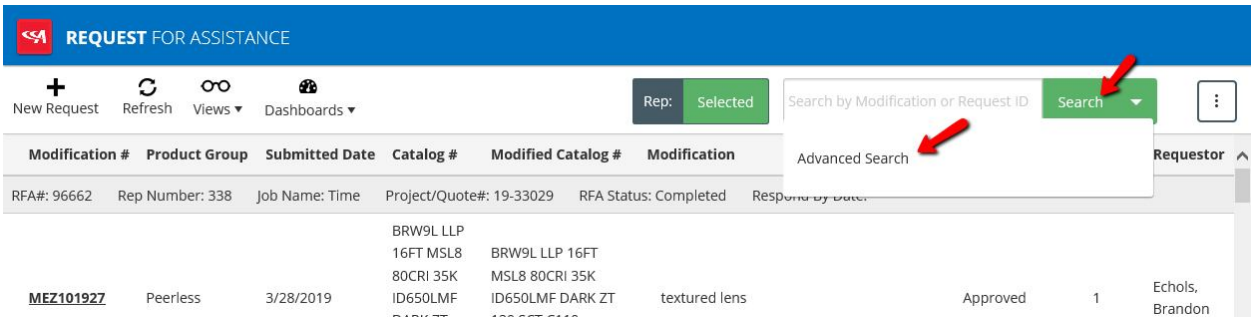


Searching (Quick Search and Advanced Search) and creating a view

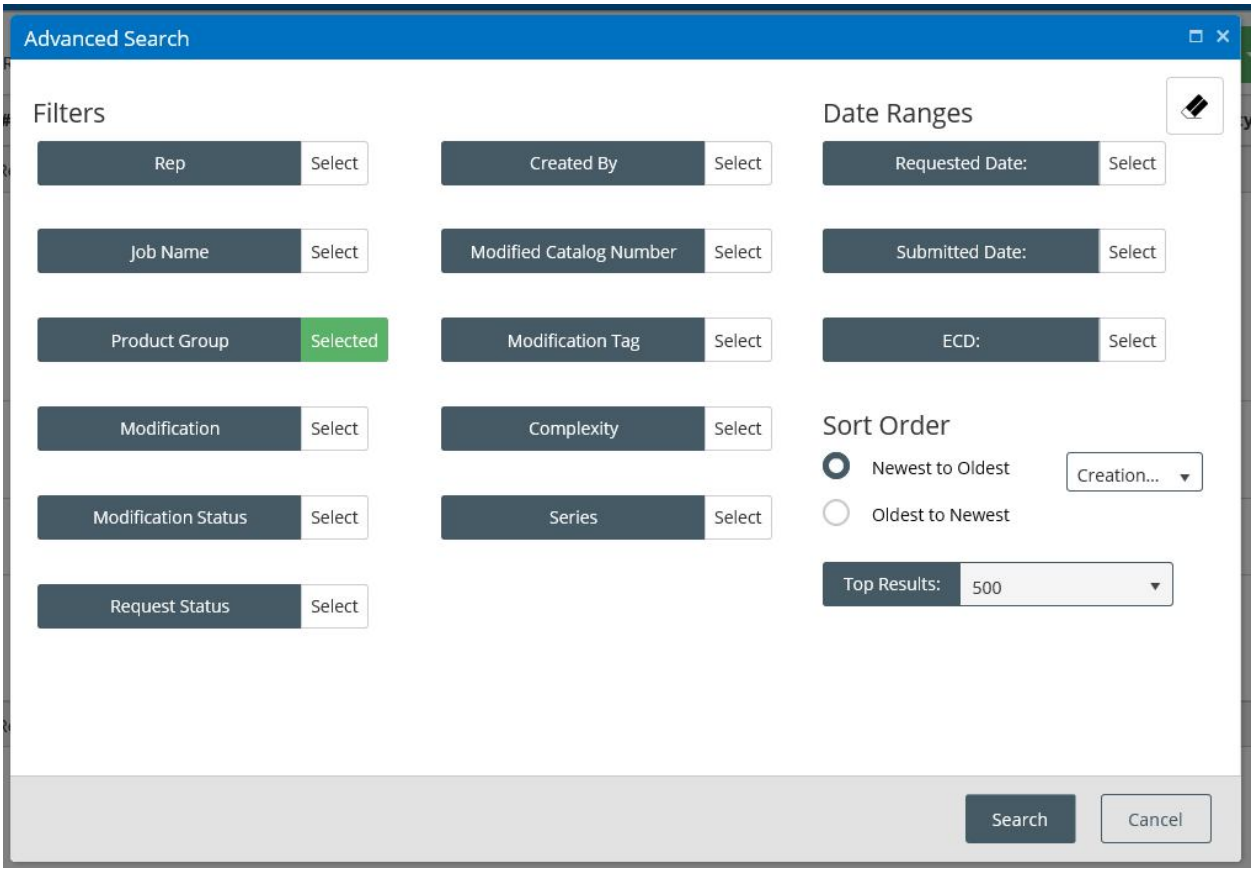
Once filtered to the Modification Dashboard, you can conduct a quick search for a specific MEZ # (or RFA #). Quick search is the free text field located at the right of your screen. Type in the number and hit the enter key to search. The dashboard will then filter displaying the results.



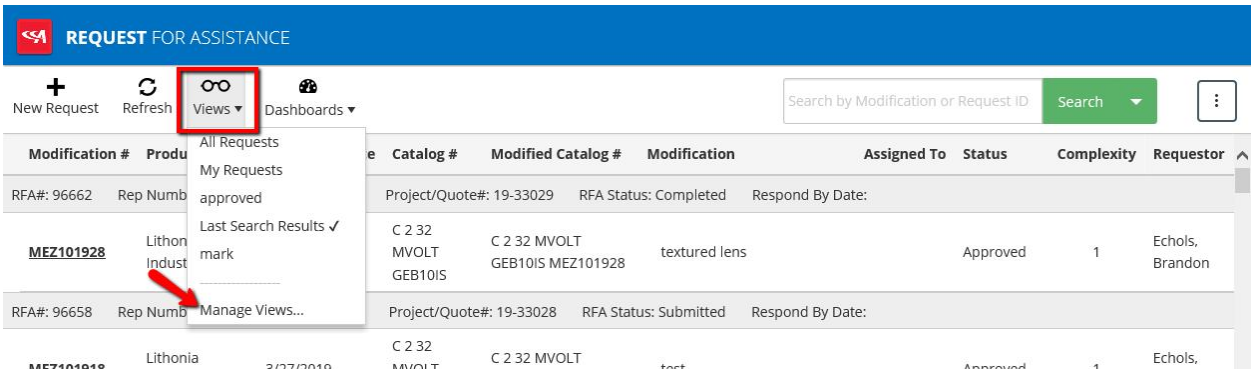
You can also conduct an advanced search for modifications. Advanced search offers more options for searching. From the mod dashboard click the Search drop down and select advanced search.

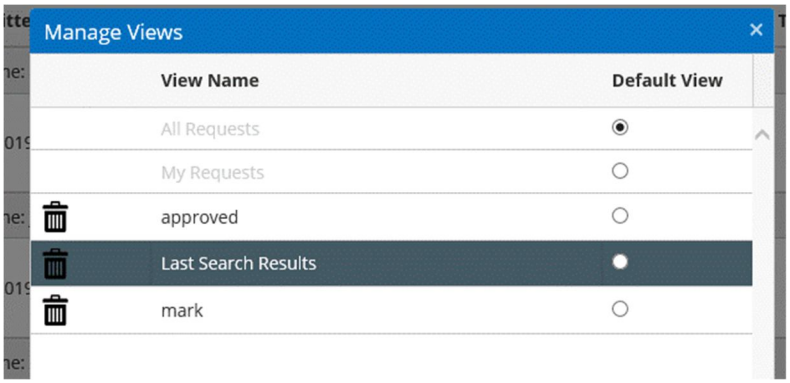


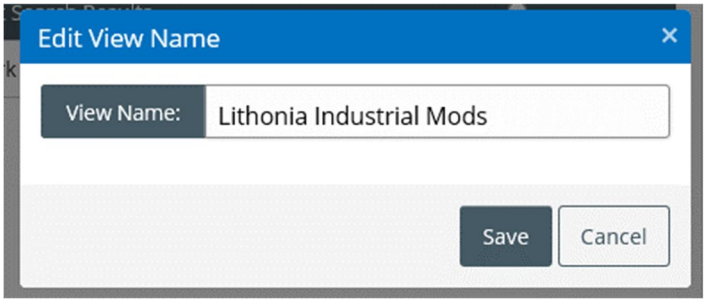
The advanced search dialog will launch. You can search by job name, product group, modification, modification status, or modified catalog number just to name a few. You also have the option to sort by newest to oldest or oldest to newest. Also keep in mind you can expand your results from the default of 100 up to 500. Once your selections have been made, click the search button. The dashboard will then load with the results.

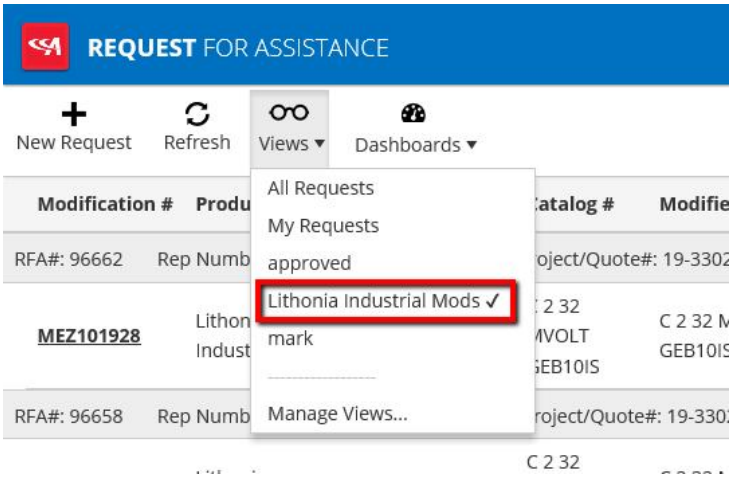


Once a search has been performed, you can save that search as view. This view will then be available at any time without having to conduct another search. To create a view go to the Views drop down and select manage views. Locate the view name of Last Search Results. Click into that row. This will give you the opportunity to rename your last search results to something more meaningful. For example all Lithonia Industrial modifications. Once saved this view will now appear in the views drop down.



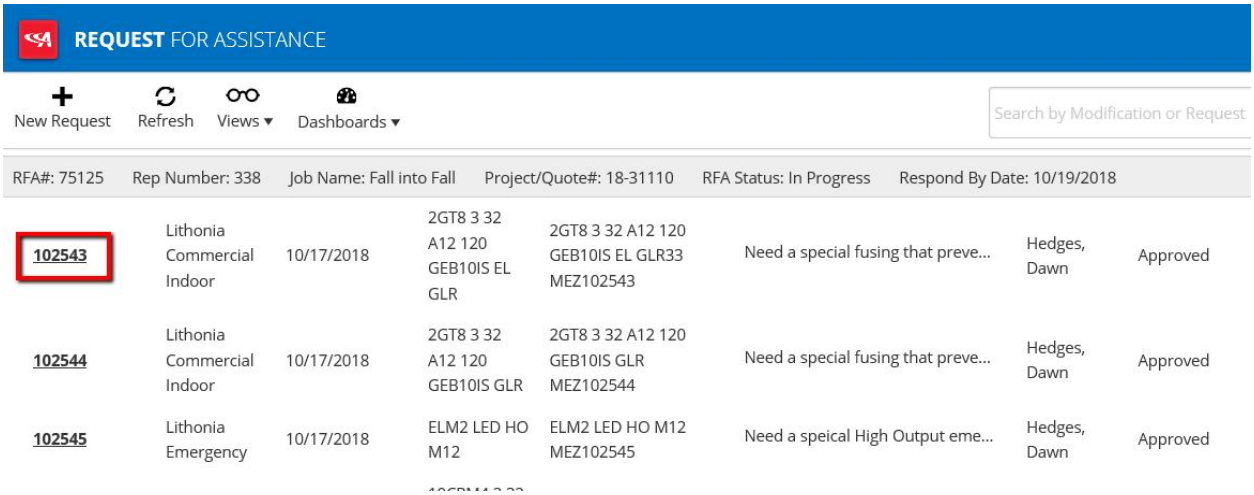


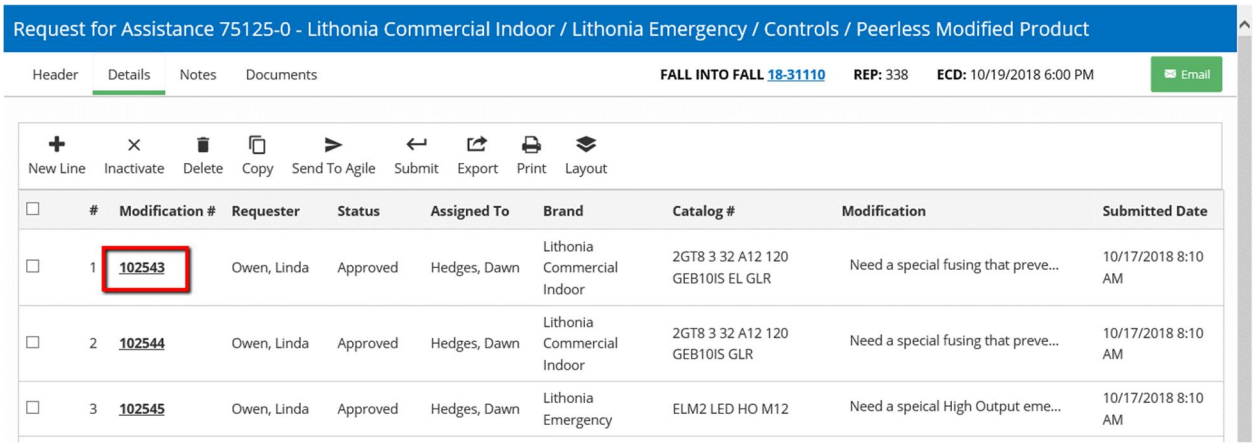




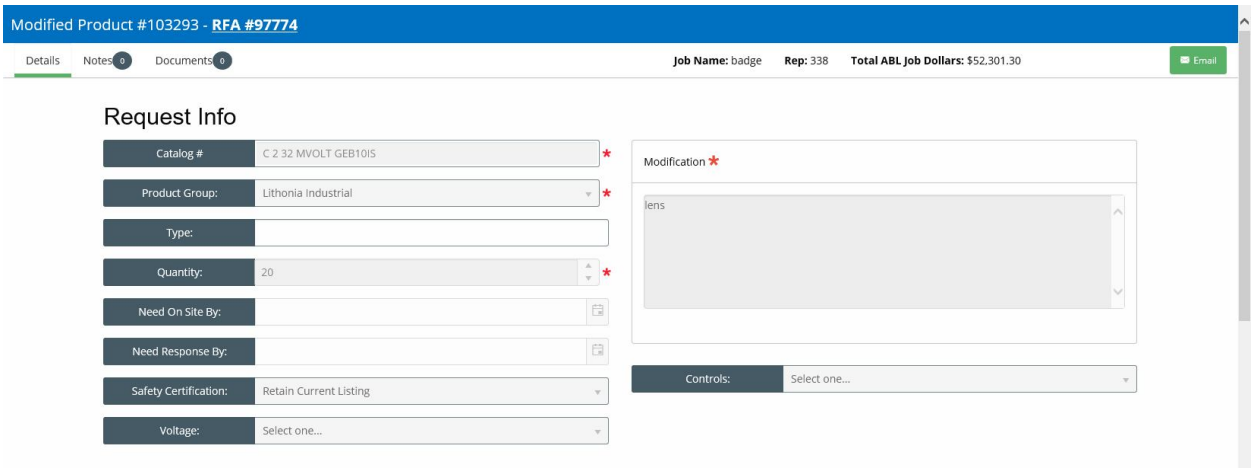
Reviewing a Processed Modification request

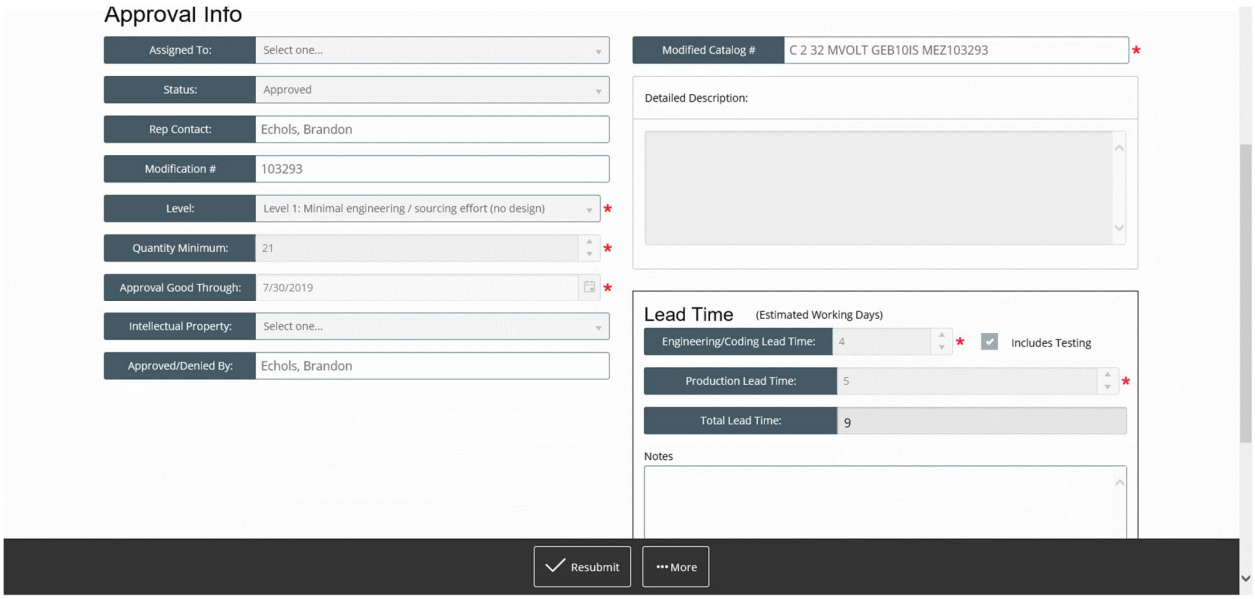
An individual modification can be opened by clicking the modification hyper link from both the Modification Dashboard and the Details tab of a specific RFA.





The top section of the modification contains the information the requester submitted to Acuity. The lower section is the Approval information.

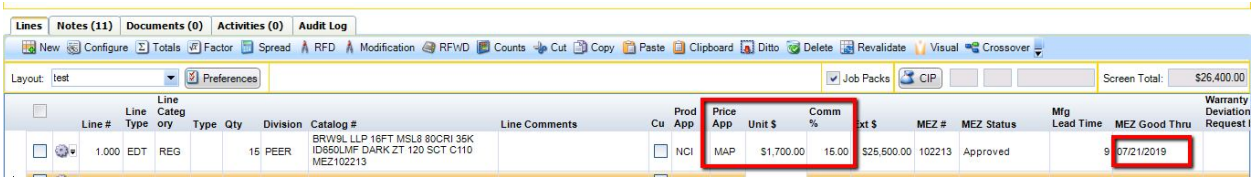




The lead time consists of Engineering/Coding Lead Time and Production Lead Time. The sum of these equal the Total Lead Time. The notes text box may include additional details from the Acuity team on the lead time. Order dating for RFA modifications looks at the Total Lead Time and targets the line accordingly. Level 3 and 4 Modifications will result in longer lead times.

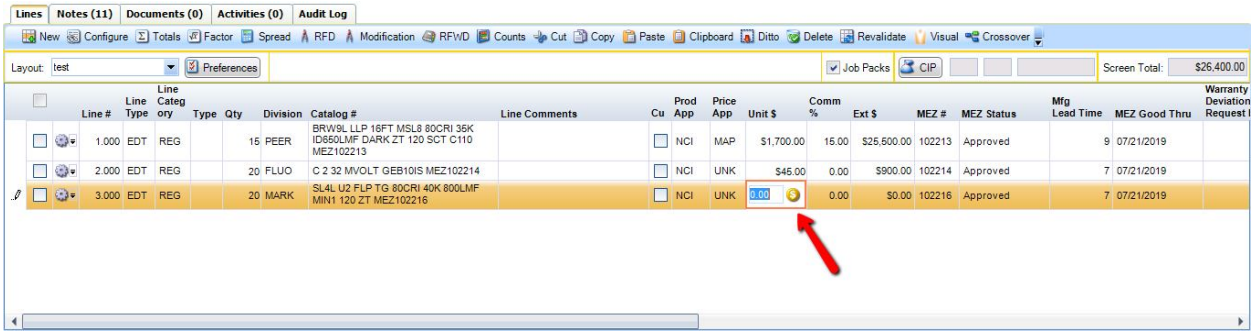
Pricing Integration with agile Quotes

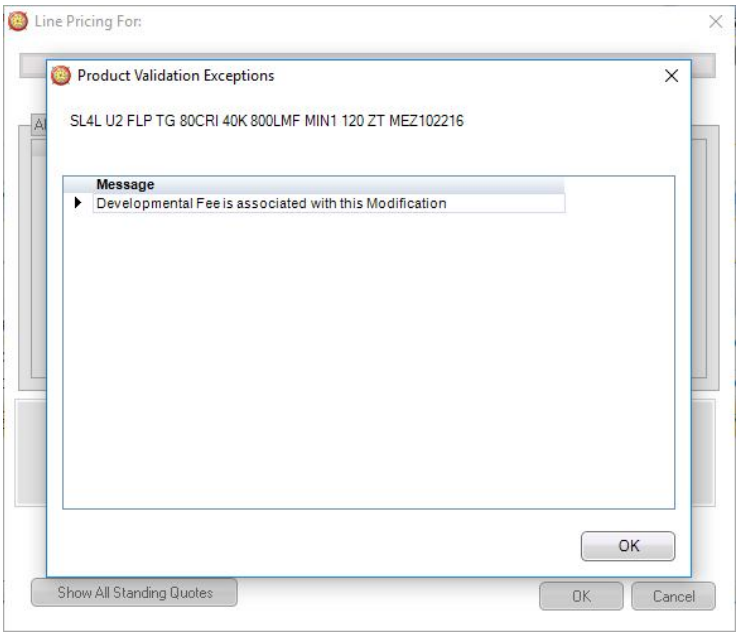
Once an RFA modification has been approved, we will pull in the modification price and com% into the quote line. The line item will automatically be price approved (price approval of MAP). Pricing will be good through the MEZ good thru date. Once that date is passed the line will lose its price approval. The modification will then need to be resubmitted to the Acuity team to extend the good thru date and re-approve.



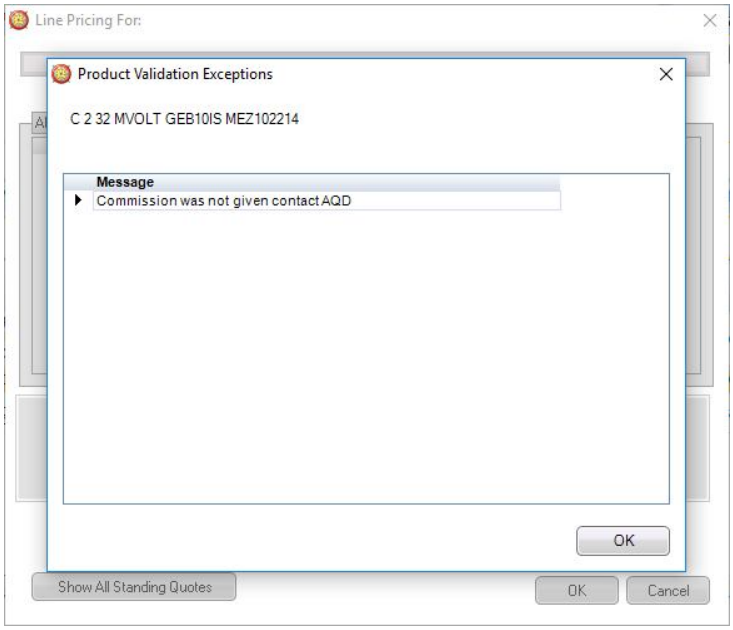
There are several instances where pricing and commission won't be applied to the quote line:

1. If a modification contains a developmental fee, we don't automatically price and commission the line. It will need to be submitted to the AQD for pricing. When you validate the line (clicking the dollar sign in the DSP column) a message will appear letting you know there is a dev fee associated to that line.





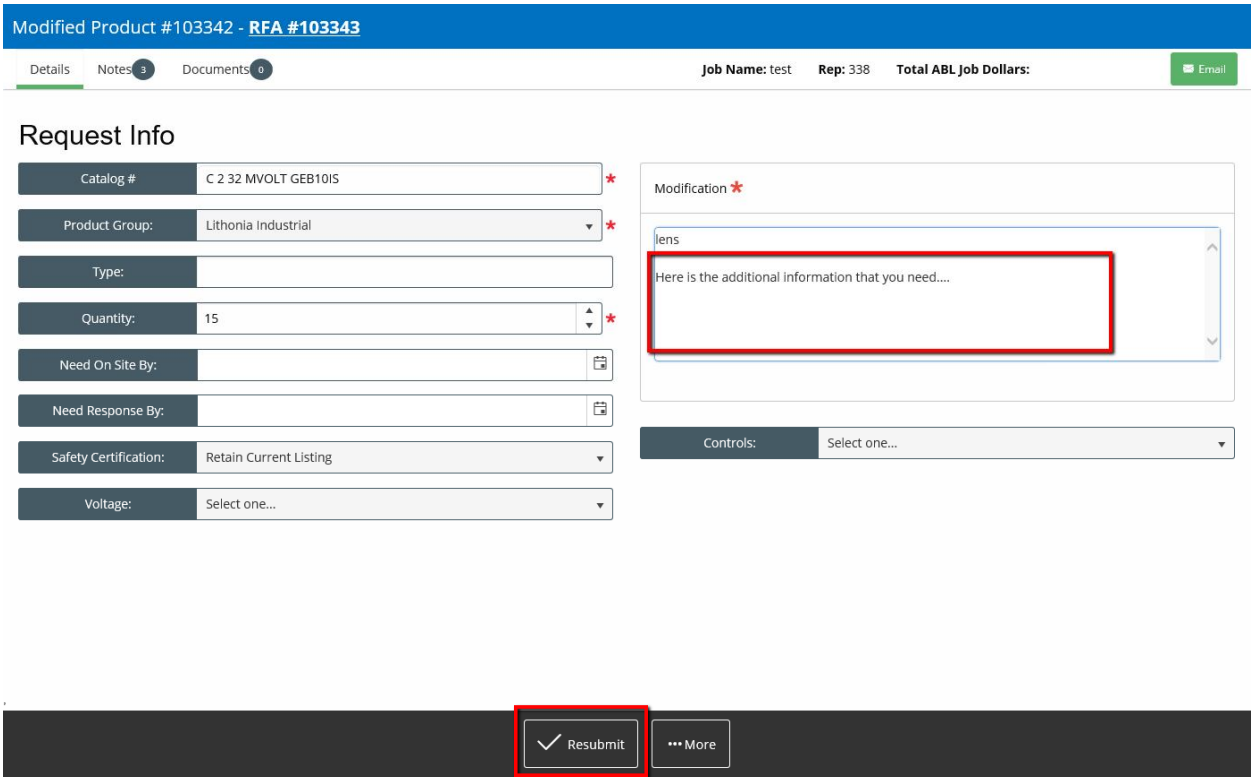
2. If a line was priced on the modification form by the corporate approver but a commission % wasn't provided, we pull in the unit $ but do not commission the line. It will need to be submitted to the AQD for approval.

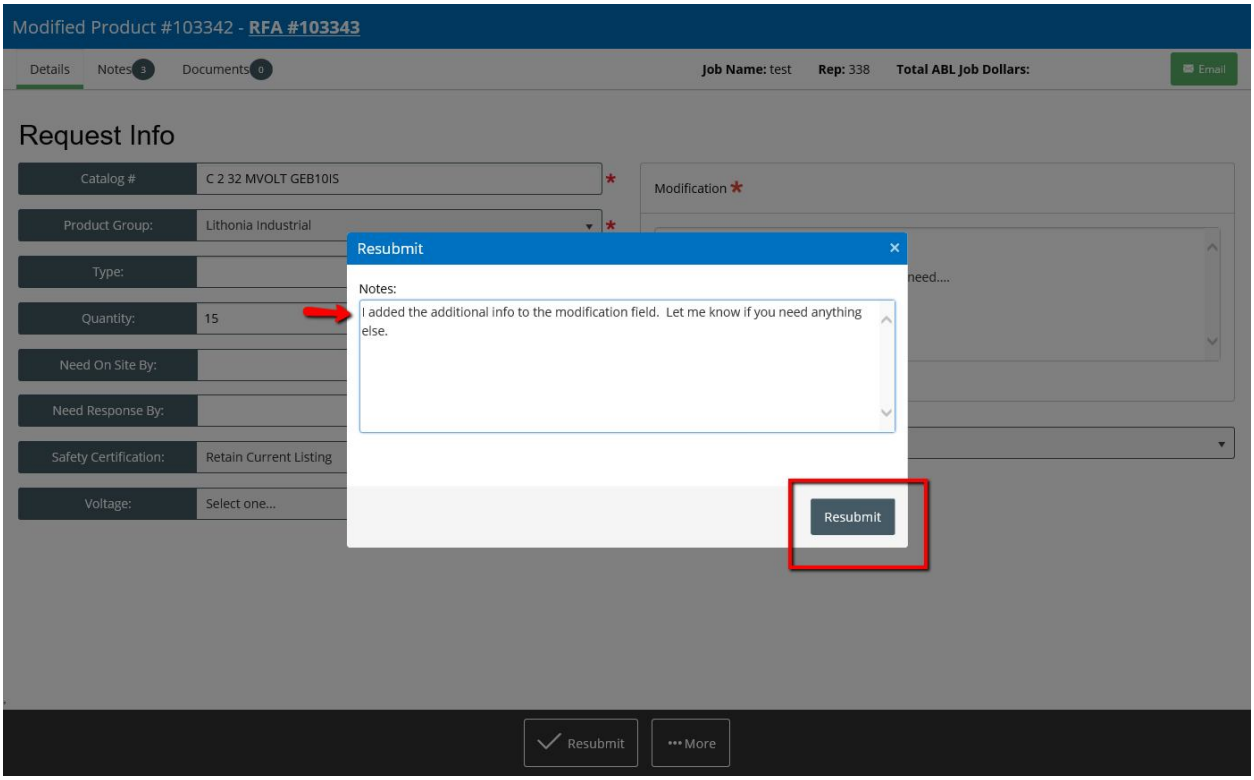


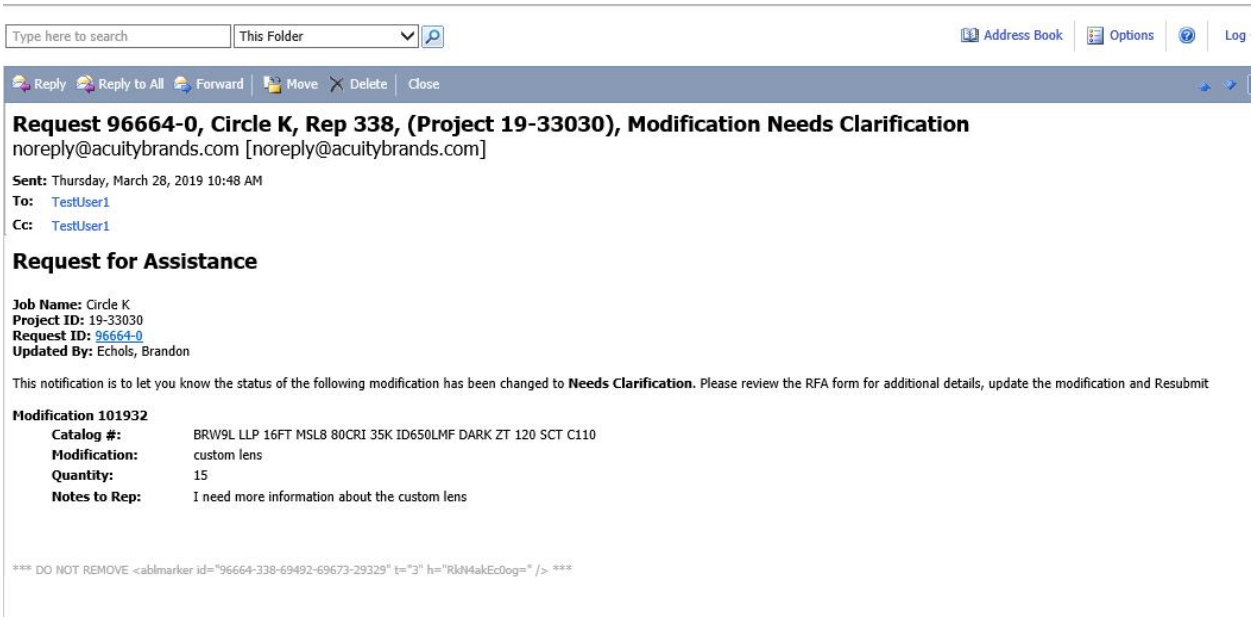
Notifications

The requester will get a system generated email each time the status of a modification changes. For example, In Progress, Needs Clarification, Approved etc. The email will contain all pertinent information. The emails will also be automatically uploaded to the RFA modification.

If a modification has been sent back to you as Needs Clarification, you will need to update the modification field with the requested information and click the resubmit button to send it back to Acuity. Once you click the Resubmit button a dialog box will display. You can type a brief message back to the Acuity team here (it is not required). Keep in mind the response to the needs clarification should be populated in the modification field and not in the notes dialog. Resubmitting the modification without providing the requested information may result in the modification being Denied.


Modified Product #103342 - RFA #103343
Details
Notes 3
Documents 0
Job Name: test
Rep: 338
Total ABL Job Dollars:
Email
Request Info
Catalog #
C 2 32 MVOLT GEB10IS
Product Group:
Lithonia Industrial
Type:
Quantity:
15
Need On Site By:
Need Response By:
Safety Certification:
Retain Current Listing
Voltage:
Select one...
Modification
lens
Here is the additional information that you need....
Controls:
Select one...
Resubmit
More


Modified Product #103342 - RFA #103343
Details
Notes 3
Documents 0
Job Name: test
Rep: 338
Total ABL Job Dollars:
Email
Request Info
Catalog #
C 2 32 MVOLT GEB10IS
Product Group:
Lithonia Industrial
Type:
Quantity:
15
Need On Site By:
Need Response By:
Safety Certification:
Retain Current Listing
Voltage:
Select one...
Modification
Resubmit
Notes:
I added the additional info to the modification field. Let me know if you need anything else.
Resubmit
Resubmit
More



Type here to search | This Folder | Address Book | Options | Log

Reply | Reply to All | Forward | Move | Delete | Close

Request 96664-0, Circle K, Rep 338, (Project 19-33030), Modification Needs Clarification

noreply@acuitybrands.com [noreply@acuitybrands.com]

Sent: Thursday, March 28, 2019 10:48 AM
To: TestUser1
Cc: TestUser1

Request for Assistance

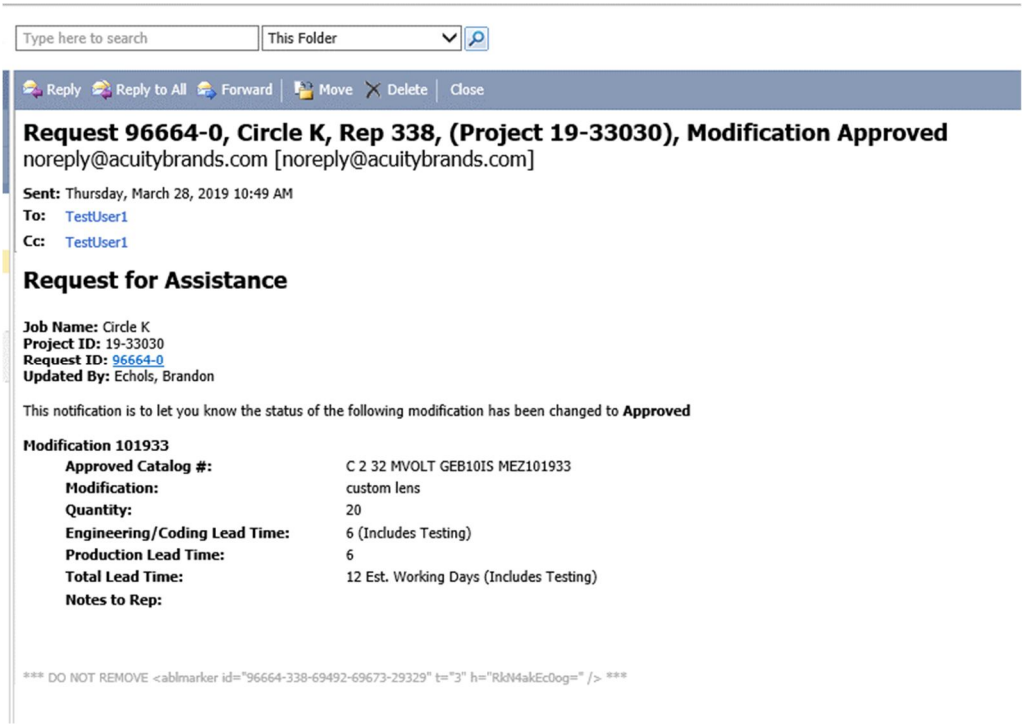
Job Name: Circle K
Project ID: 19-33030
Request ID: 96664-0
Updated By: Echols, Brandon

This notification is to let you know the status of the following modification has been changed to **Needs Clarification**. Please review the RFA form for additional details, update the modification and Resubmit

Modification 101932

Catalog #:	BRW9L LLP 16FT MSL8 80CRI 35K ID650LMF DARK ZT 120 SCT C110
Modification:	custom lens
Quantity:	15
Notes to Rep:	I need more information about the custom lens

*** DO NOT REMOVE <ablmarker id="96664-338-69492-69673-29329" t="3" h="RkN4akEc0og=" /> ***



Type here to search | This Folder

Reply | Reply to All | Forward | Move | Delete | Close

Request 96664-0, Circle K, Rep 338, (Project 19-33030), Modification Approved

noreply@acuitybrands.com [noreply@acuitybrands.com]

Sent: Thursday, March 28, 2019 10:49 AM
To: TestUser1
Cc: TestUser1

Request for Assistance

Job Name: Circle K
Project ID: 19-33030
Request ID: 96664-0
Updated By: Echols, Brandon

This notification is to let you know the status of the following modification has been changed to **Approved**

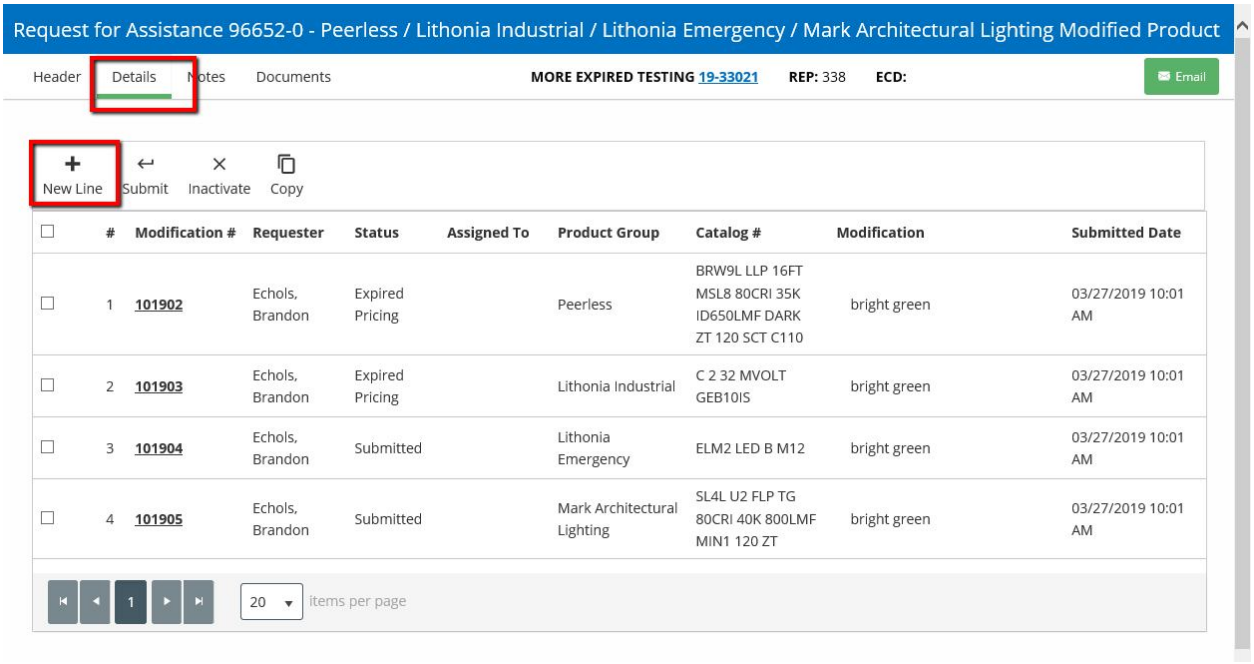
Modification 101933

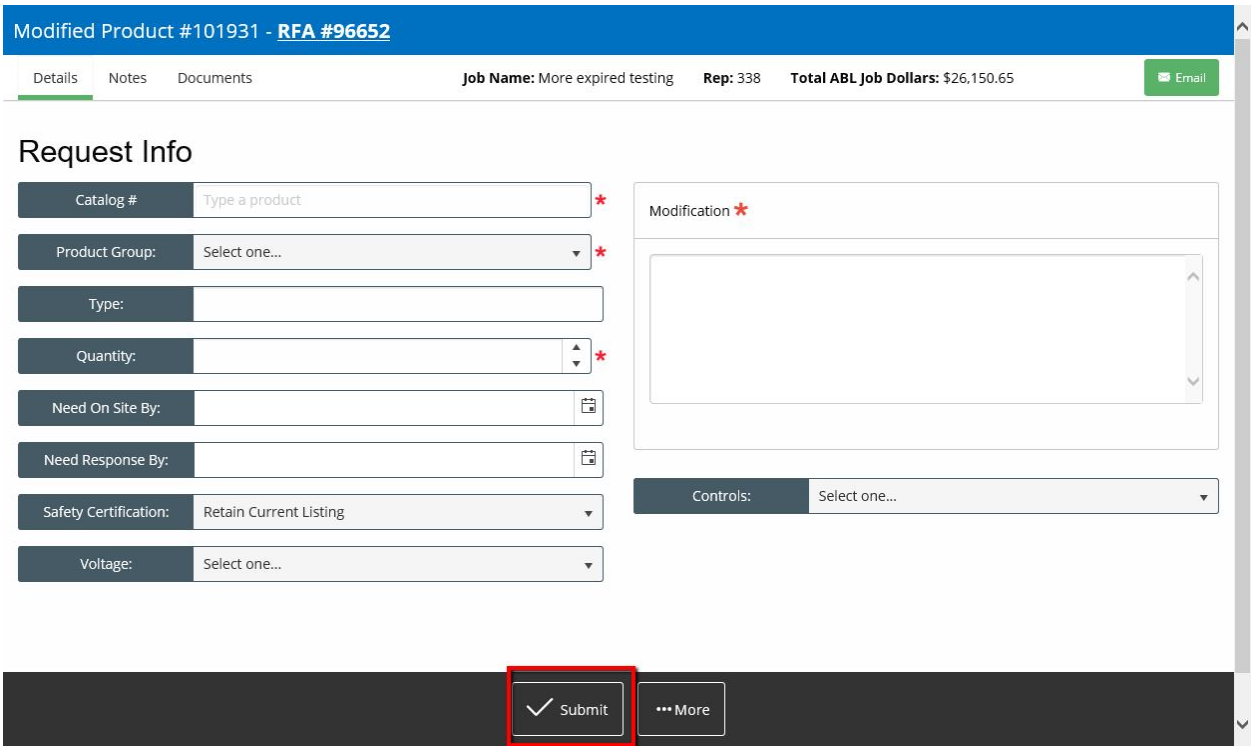
Approved Catalog #:	C 2 32 MVOLT GEB10IS MEZ101933
Modification:	custom lens
Quantity:	20
Engineering/Coding Lead Time:	6 (Includes Testing)
Production Lead Time:	6
Total Lead Time:	12 Est. Working Days (Includes Testing)
Notes to Rep:	

*** DO NOT REMOVE <ablmarker id="96664-338-69492-69673-29329" t="3" h="RkN4akEc0og=" /> ***

Adding additional modifications to a submitted RFA

At any time, you can add additional modification lines to an RFA. Locate and open the RFA – Modification request and go to the details tab. There you will see the list of products on this request. Click the New Line button. Input your request info and click Submit. It will then be sent to Acuity for processing. The new line will now appear at the bottom of the grid on the details tab.

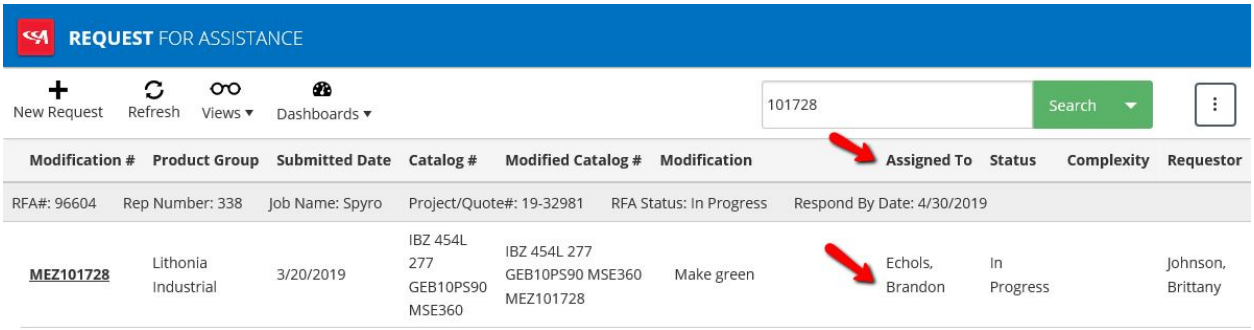

Request for Assistance 96652-0 - Peerless / Lithonia Industrial / Lithonia Emergency / Mark Architectural Lighting Modified Product
Header
Details
Notes
Documents
MORE EXPIRED TESTING 19-33021
REP: 338
ECD:
Email
New Line
Submit
Inactivate
Copy
Modification # Requester Status Assigned To Product Group Catalog # Modification Submitted Date
1 101902 Echols, Brandon Expired Pricing Peerless BRW9L LLP 16FT MSL8 80CRI 35K ID650LMF DARK ZT 120 SCT C110 bright green 03/27/2019 10:01 AM
2 101903 Echols, Brandon Expired Pricing Lithonia Industrial C 2 32 MVOLT GEB10IS bright green 03/27/2019 10:01 AM
3 101904 Echols, Brandon Submitted Lithonia Emergency ELM2 LED B M12 bright green 03/27/2019 10:01 AM
4 101905 Echols, Brandon Submitted Mark Architectural Lighting SL4L U2 FLP TG 80CRI 40K 800LMF MIN1 120 ZT bright green 03/27/2019 10:01 AM
1
20
items per page

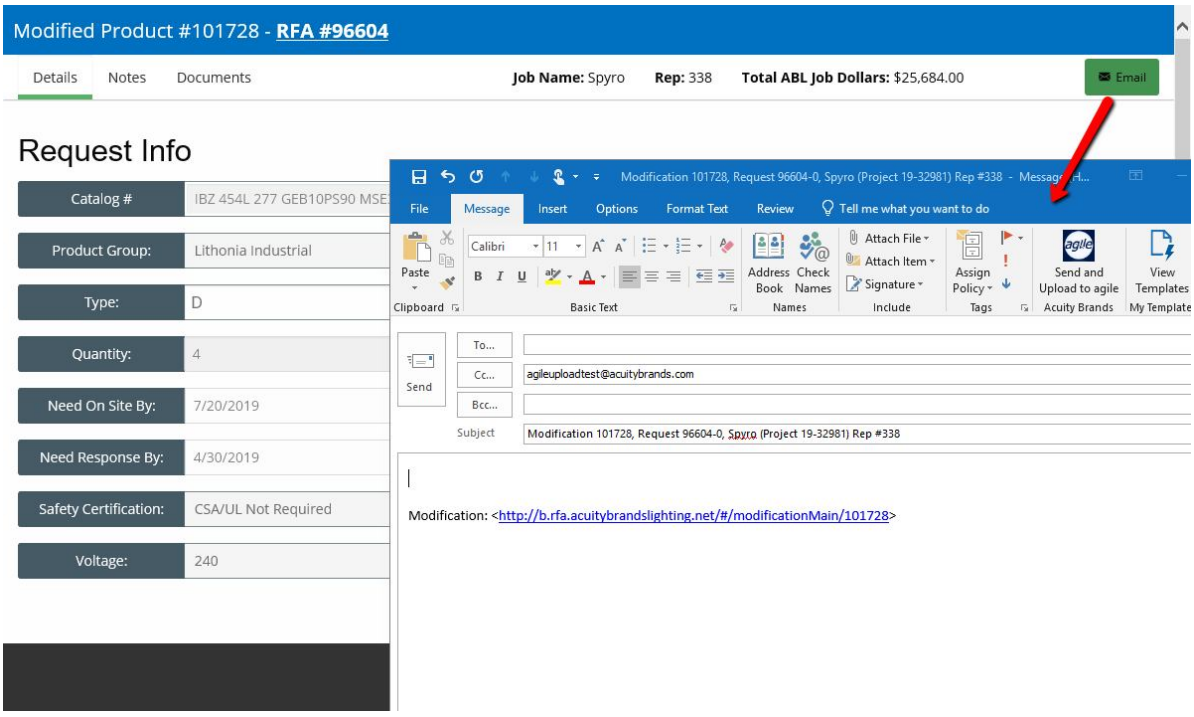

Modified Product #101931 - RFA #96652
Details
Notes
Documents
Job Name: More expired testing
Rep: 338
Total ABL Job Dollars: $26,150.65
Email
Request Info
Catalog #
Type a product
Product Group:
Select one...
Type:
Quantity:
Need On Site By:
Need Response By:
Safety Certification:
Retain Current Listing
Voltage:
Select one...
Modification
Controls:
Select one...
Submit
More

Follow Up / Escalations

If you need to follow up on submitted modifications, refer to the table below.

MEZs should be assigned within 24 hours of receipt. Once you open the modification you will see an email icon at the top right of your screen. Clicking that will launch an email with a link to the modification. Send your email to the applicable Acuity team.





Brand / Group	Product Support Inbox
Gotham	Jeffrey.Beck@AcuityBrands.com
Lithonia Commercial Downlighting	Jeffrey.Beck@AcuityBrands.com
Aculux, Indy, Juno Linear	productsupportJAI@acuitybrands.com
Juno Trac	
Juno Recessed Downlighting	productsupportJAI@acuitybrands.com
Lithonia Residential Downlighting, Lithonia Decorative Residential	productsupport-decorativeresidential@acuitybrands.com
Lithonia Decorative Residential	
Architectural Ambient (Peerless, Mark, Winona, Hydrel, Healthcare)	ATS-A###@AcuityBrands.com where ### = your 3 digit agency number.
Commercial Indoor	ProductSupport-CommercialIndoor@Acuitybrands.com
Industrial	ProductSupport-Industrial@AcuityBrands.com
Reloc	ProductSupportReloc@AcuityBrands.com
Emergency	ProductSupportEmergency@AcuityBrands.com
Commercial Outdoor	ProductSupport-Outdoor@AcuityBrands.com
Commercial Outdoor	
Commercial Outdoor (Poles)	
ASL - Antique Street Lamp	TSGArchOutdoor.AntiqueStreetLamps@AcuityBrands.com