

Agile Email Upload User Guide

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Introduction

Overview

agile Email Upload is a tool that will allow you to upload emails directly to and from agile:

- ✓ Projects
- ✓ Quotes
- ✓ Orders

Once an email is uploaded to or from *agile*, the email is tracked so you can easily add or replace copies of additional correspondence.

The *agile* Email Upload requires an *agile* Outlook Add-In installation. This add-in will appear on the Outlook toolbar and will be visible when creating emails from Outlook or *agile*. A link to the install and directions on how to install are located on page 4 of this document.

Getting Help

This User Guide will be your first source for 'How To' information. For additional questions and concerns please contact the Lithonia Support Center at 1-800-241-3638 or via email at <u>SuptCenReps@Lithonia.com</u>.

Agile Email Upload – Outlook Addin Install

In order to utilize *agile* Email Upload you will need to install the addin. Note: if you have Outlook open, you will need to close and re-open Outlook in order to see the addin.

1. Click on the following link to download the Outlook addin.

http://messagemarker.acuitybrandslighting.net/outlookaddin/setup.exe

Click	Run						
4	View Downloads - Windows Internet Exp	lorer					x
\ \	/iew and track your downloads		Searc	h downloads			P
N	lame	Location		Actions			-
	setup.exe 689 KB emarker.acuitybrandslighting.net	Do you want to run or save this program?		Run	Save	•	

Click Install

Microsoft Office Custo	omization Installer
Publisher has been v Are you sure you war	rerified of to install this customization?
Name:	ABLUploadEmailAddin
From:	http://messagemarker.acuitybrandslighting.net/OutlookAddin/ABLUploadEma ilAddin.vsto
Publisher:	Acuity Brands, Inc.
While Offic computer.	te customizations from the Internet can be useful, they can potentially harm your If you do not trust the source, do not install this software. <u>More Information</u> Install Don't Install

Microsoft Office Co	ustomization Installer
The Microsoft O	ffice customization was successfully installed.
Name: From:	ABLUploadEmailAddin http://messagemarker.acuitybrandslighting.net/OutlookAddin/ABLUploadEmailAd din.vsto
	Close



Uploading an existing or new email

1. Click on the *agile* icon to upload an existing or new email to *agile*.

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File	Messag	je											۵ 🕜
🚖 Ignore 🗞 Junk 🔻	X Delete	Reply Rep) 🕞	🖳 Meeting	🔐 Email Upload 🚖 To Manager 🛐 Team E-mail	4 + +	Move	Pules ▼ M OneNote Actions ▼	Mark Unread	at Translat	Pind Related • e	Zoom	Upload
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From: To: Cc: Subject:	Hall, S Hall, S Uplo:	Susan Susan ading an ema	il to agile								Sent:	Tue 09/	/25/2012 7:34 AM
	Spie												

 You will need to Login to *agile* the first time you launch the *agile* Email Upload. Enter your *agile* User Name and Password, and then click Login. Checking the box next to the **Remember User Name and Password** option will prevent you from having to log on each time you open Outlook.

Login to agile					23
User name:					
Password:					
Remember user nam	e and password				
Login		Cancel			
L			_	_	

If you choose the Remember User Name and Password option and you need to change your login information, click the Logout link on the Email Upload search page. The Login to *agile* dialog will display again for you to make the change.

agile Email Upload	
Rep: 123 •	
Email Description: Uploading an email to agile	
Document Type: Project Quote Order 	
Category: Email Upload	•
Search Term(s):	Search
Select a project	
Upload	•
Status: Logged in	Logout:

- 3. Enter your search criteria in the *agile* Email Upload window.
- 4. The **Rep** will default to your primary Rep. If you have multiple Rep numbers; you can choose the alternative Rep from the drop down.
- 5. The **Email Description** will default to the subject, but can be changed before you upload it.
- 6. Use the **Document Type** to select the application where you want the email to be uploaded (Project, Quote or Order)
- 7. Select the **Category** where you want to email to be filed. Default is the new Email Upload category
- 8. In the Search Terms field, enter your search criteria. The following search criteria can be performed:
 - a. Project Search by job name, job alias or project number
 - b. Order Search by job name, hold order #, order #, contractor or distributor PO
 - c. Quotes Search by job name, quote id, or version label
- 9. The search is a 'fuzzy' search, so you can enter partial information. The search results will return all projects, quotes or orders that contain the search term you enter. Make sure you separate each search term with a space.

Search by partia	al Job Name					
agile Email Upload						x
Rep:	123 🔹					
Email Description:	Uploading an emai	l to agile				
Document Type:	Project	Quote	Order			
Category:	Email Upload				•	
Search Term(s):	Linda				Reset	
Select a project						
Linda Save as N Project #: 12-137	lew 707					
Linda Auto Sub Project #: 12-136	93					Е
Linda's Bike She Project #: 12-136 Alias(es): Linda's Bike Shop	op 520					
Linda test Project #: 12-135	i16					
Linda Test Project #: 12-134	99					
Linda test Project #: 12-134	95					
Linda Spec Reg	test					-
	Uple	bad		Cancel		
Status: Search return	ned 17 items				Log	out:



10. Each page is limited to 25 results. You may receive more results than will fit in the page. Click the 'Click here for more projects' to review the additional pages.

agile Email Upload		x
Rep:	123 •	
Email Description:	Uploading an email to agile	
Document Type:	Project Quote Order	
Category:	Email Upload	•
Search Term(s):	12	Reset
Select a project		
 Project #: 12-137	'17	^
Monday Project #: 12-137	/16	
MIKE TEST SPE Project #: 12-137	C 115	
 Project #: 12-137	/14	
Rainforest Cafe Project #: 12-137	13	
 Project #: 12-137	/12	
Click here for n	iore projects	•
	Upload	
Status: Search return	ned 25 items	Logout:

Search results more than 25 items returned.

11. Highlight the project, quote or order you wish to upload the email to, and then click Upload. The *agile* Email Upload dialog will close.

agile Email Upload		
Rep:	123 -	
Email Description:	Uploading an email to agile	
Document Type:	Project Quote Order	
Category:	Email Upload	-
Search Term(s):	12	Reset
Select a project		
 Project #: 12-137	'17	^
Monday Project #: 12-137	/16	
MIKE TEST SPE Project #: 12-137	C /15	
Project #: 12-137	Postowast	
Project #: 12-137	'13	
 Project #: 12-137	/12	
Click here for n	nore projects	E
	Upload Cancel	
Status: Search return	ned 25 items	Logout:

12. You can view the uploaded email from the dashboard or in the Documents tab of the project, quote or order.

Garila	Ho	me I	Project	ts S	pecs Qu	otes	Orders	Post	Sales	Cont	acts
ague	*	lome	Ale	erts 🧯	Project Co	ntainer	⊗ Follo	w-Up	🔳 Bid B	Board	遂 Cus
🔭 Pro	oject Co	ontain	er								
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	1										

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General	C	ontacts	(1) Notes	(0) Documents	(2) STAR (0) RF	D (0) Quote (1)	Mfg Quote (0)	Submittals (0)	Orders (0)	Returns (0)	Audit Log
Link	/Up	load									
© Rem	ove	Selected	Items								
			Doc #	Category	Description		Fi	ile Link		File D	ate
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	Image: Point of the state of the								12 3:04:04 PM		

Uploading an email created from agile

You can create an email directly from Projects, Quotes or Orders and attach a copy of the email to the documents tab.

Here is an example from Project Container:

1. From an open project, click on the email icon located on the toolbar.

8	AMC THEATRE - 12-13732 - Windows Internet Explorer													
ŀ	http://dev.pro	ectcontainer.ac	uitybrandslightir	n g.net /Proje	ct/EnterE	ditProject.asp	ox?ProjectId=300	382&RepId=33	8&openNote	s=Fal				
	≫ <u>P</u> rint ⊌ <u>S</u> av	e As New 🛛 🔊 <u>E</u>	mail											
	General Contact	(1) Notes (0)	Documents (2)	STAR (0)	RFD (0)	Quote (1)	Mfg Quote (0)	Submittals (0)	Orders (0)	Retu				
	Location					Specification Registration								
	Project	#:12-13732	Rep	b: 123		Territory/O	rder							
I	Master Proje	ect:Select or T	ype a Value		•		Rep:							
	*Job Nar	ne: AMC THE	ATRE			Spec	Rep:							
	Addre	ss:				Appr Sta	roval atus:	_						
l							Submit							
						Status								

2. This will launch Outlook. The subject will default to the Job Name and document number for Projects, Quotes and Orders. Orders will also include the PO # if the PO# has been entered and saved on the order when the email is generated.

🔁 🖬 🤊 U 🔺 🔻	↓	AMC THEATRE (Project 12-13)	32) - Message (HTML)			x				
File Message Insert Options Format Text Review										
Cut Copy Paste V Format Painte	r B I U ™ A ĭ	E - } - ● E = ₽ ₽ ₽ Address C Book N	eck mes File Item •	 ♥ Follow Up ▼ ♥ High Importance ↓ Low Importance 	Zoom Send and Upload to agile	e				
Clipboard	Basic Text	🕞 Name:	Include	Tags 🖓	Zoom Acuity Brands					
Send Subject: A	MC THEATRE (Project 12-13732)									

3. A **message marker** will be included in the bottom section of the email. This marker tells *agile* where to file the email thus eliminating the need for the Email Upload search screen. Changes to the message marker will interrupt this flow, so do not delete it. If the message marker is accidently deleted, the Email Upload search screen will appear for you to select the appropriate project.



*** DO NOT REMOVE <ablmarker id="978e337d-1437-4252-b849-9d9fe2bc36ff" t="2" h="Hd3Wrqlau1E=" /> ***



4. When you are ready to send your email, click on the Send and Upload to *agile* icon.

	7047	Tar Based	,	,				AMC.	THEATRE (Project 12-13732)
File	Message	Insert Options	Format Text R	eview					
Paste	∦ Cut ोa Copy ∮ Format Painter	Times New F ▼ 12 B I I	· A [*] A [*] ≔ · <u>A</u> · ≡ ≡ ≡	}≡ - 🔧 ■ 🚝 🚝 Ada Ba	dress Check ook Names	Attach File	 ♥ Follow Up ▼ Inigh Importance Low Importance 	Q Zoom	Send and Upload to agile
Cli	pboard 5	В	asic Text	G	Names	Include	Tags 🖓	Zoom	Acuity Brands
Send	To <u>Hall</u>	, Susan;							
	Subject: AM	C THEATRE (Project 12-13	3732)						

Note: if you just click the Send button, the email will be sent, but will not be uploaded to the documents tab in *agile*. You can choose to upload it at a later date – the message marker will remain on the email to direct it where to go.



Uploading an email that has already been uploaded to agile

1. As your email correspondence continues, you may want to upload additional copies or replace copies of the email. Simply click on the Upload to *agile* button.

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gnore X unk + Delete Delete	Reply	Reply Forward Respond	Meeting	哈금 agile Enhar ஹ Team E-mai 2월 Reply & De	ncem 🙈 - I 🖌 🖌 I lete 🎯 Quick Step	To Manager Done Create New S	4 + 1	Move	Rules - M OneNote Actions - Move	Mark Unread	Categorize Tags	Follow Up +	ato Translate	A Find → Related → → Select → Editing	R Zoom Zoom	Upload to agile Ácuity Brands
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* DO NOT F	REMOV	/E <abimarker id<="" td=""><td>="978e33</td><td>7d-1437-4252</td><td>-b849-9d9</td><td>9fe2bc36ff"</td><td>t="2" h</td><td>="Hd3</td><td>Wrqlau1E="</td><td>/> ***</td><td></td><td></td><td></td><td></td><td></td><td></td></abimarker>	="978e33	7d-1437-4252	-b849-9d9	9fe2bc36ff"	t="2" h	="Hd3	Wrqlau1E="	/> ***						

2. The Confirm Email Upload dialog will be displayed. Click the **Replace** button to replace the copy of the email or **Add** to add a new copy. The message marker in the body of the email routes the email to the appropriate document in *agile*.

agile Email Upload		23
Rep: 123 -		
Email Description: RE: AMC THEATRE (Project 12-13732)		
Document Type: Project Quote Order 		
Category: Email Upload	•	
Search Term(s):	Search	
Select a projeor Confirm Email Upload		
This email has already been uploaded to agile. Do you want to Replace the existing email or Add an additional copy? Replace Add Cancel		
Upload Cancel		
Status: Logged in	Logo	out: