



**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 SuptCenReps@Lithonia.com.

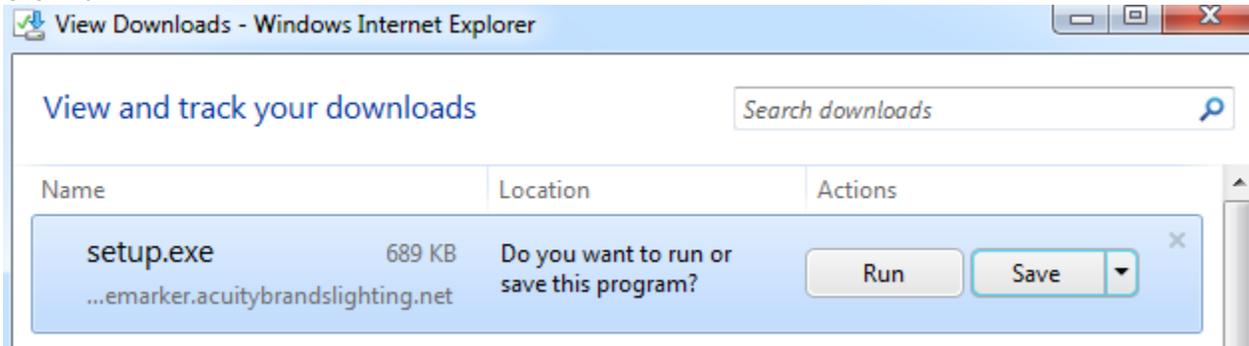
Agile Email Upload – Outlook Addin Install

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.

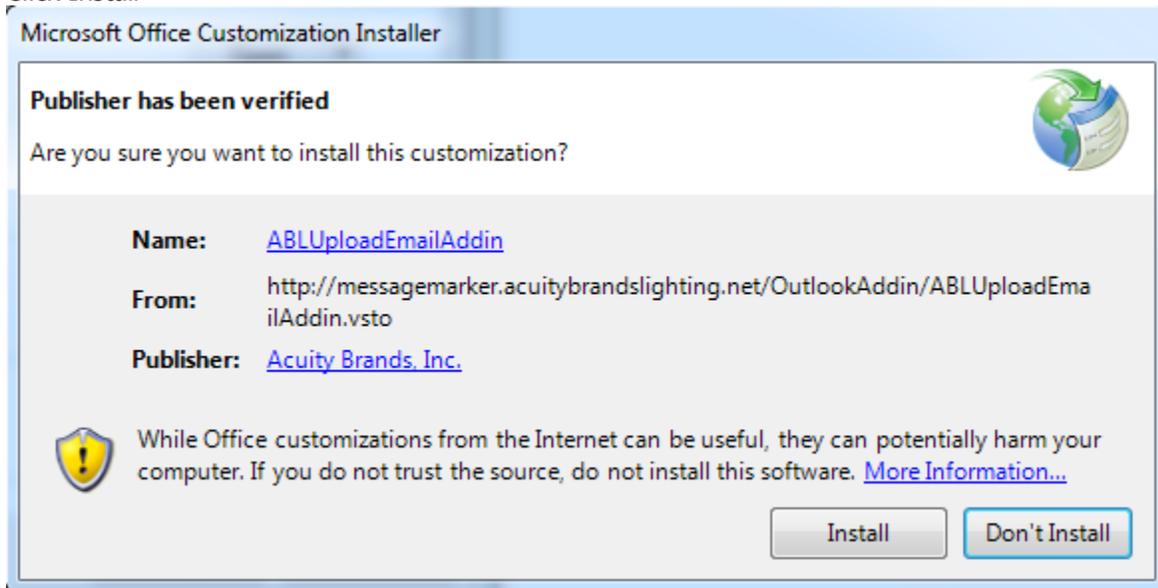
1. Click on the following link to download the Outlook addin.

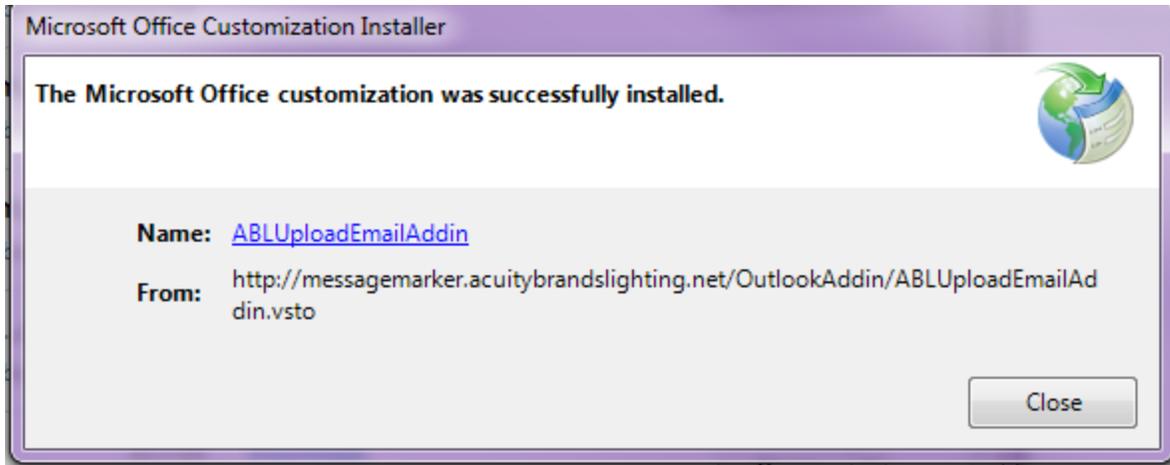
<http://messagemarker.acuitybrandslighting.net/outlookaddin/setup.exe>

Click Run



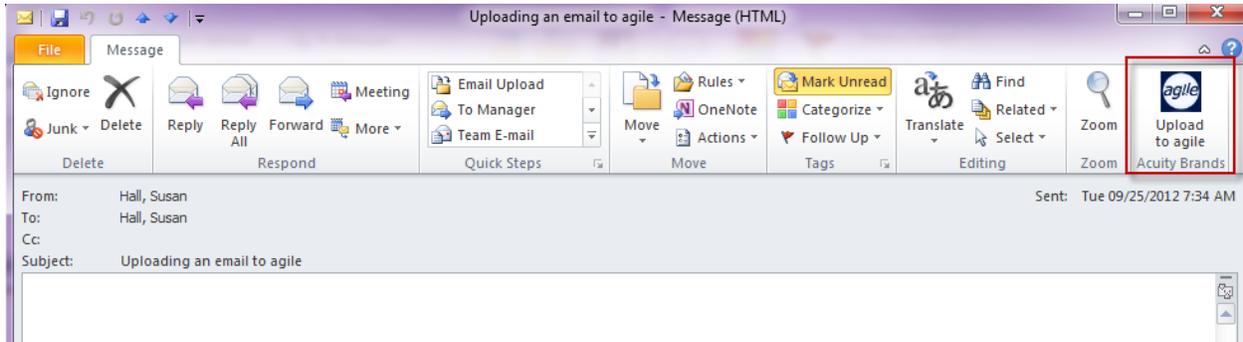
Click Install



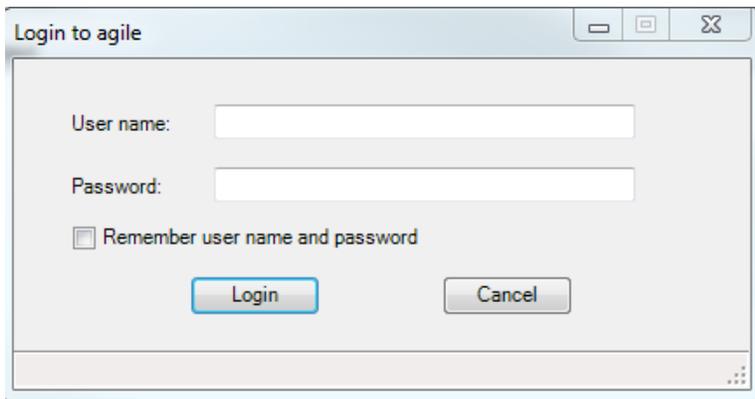


Uploading an existing or new email

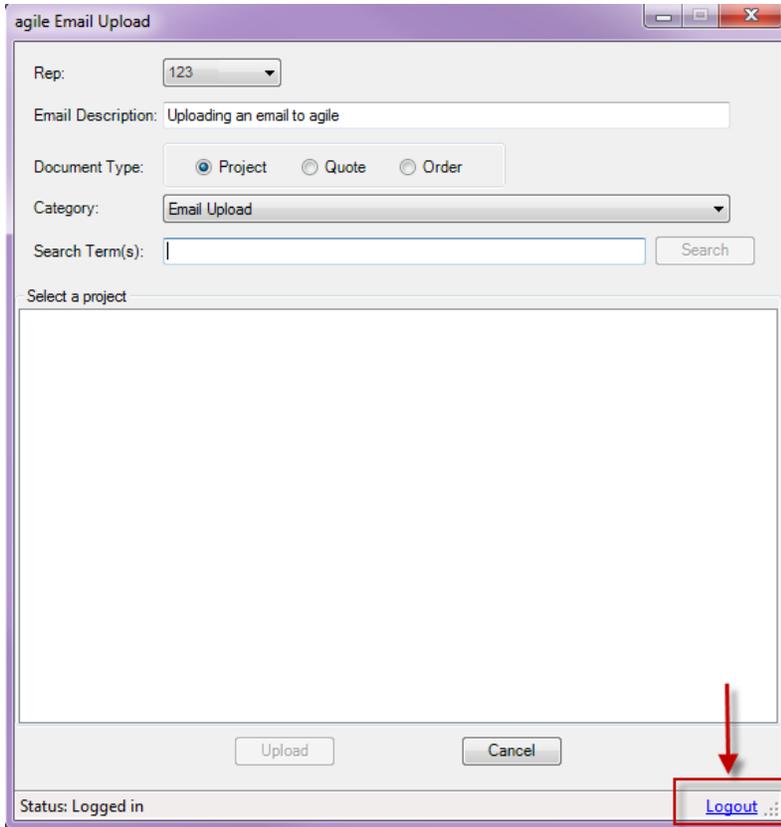
1. Click on the *agile* icon to upload an existing or new email to *agile*.



2. 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.



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.



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 partial Job Name

The screenshot shows the 'agile Email Upload' window. At the top, there are several input fields: 'Rep:' with a dropdown menu showing '123'; 'Email Description:' with a text box containing 'Uploading an email to agile'; 'Document Type:' with radio buttons for 'Project' (selected), 'Quote', and 'Order'; 'Category:' with a dropdown menu showing 'Email Upload'; and 'Search Term(s):' with a text box containing 'Linda' and a 'Reset' button. Below these fields is a list titled 'Select a project' containing the following items:

- Linda Save as New**
Project #: 12-13707
- Linda Auto Sub**
Project #: 12-13693
- Linda's Bike Shop**
Project #: 12-13620
Alias(es):
Linda's Bike Shop
- Linda test**
Project #: 12-13516
- Linda Test**
Project #: 12-13499
- Linda test**
Project #: 12-13495
- Linda Spec Reg test**

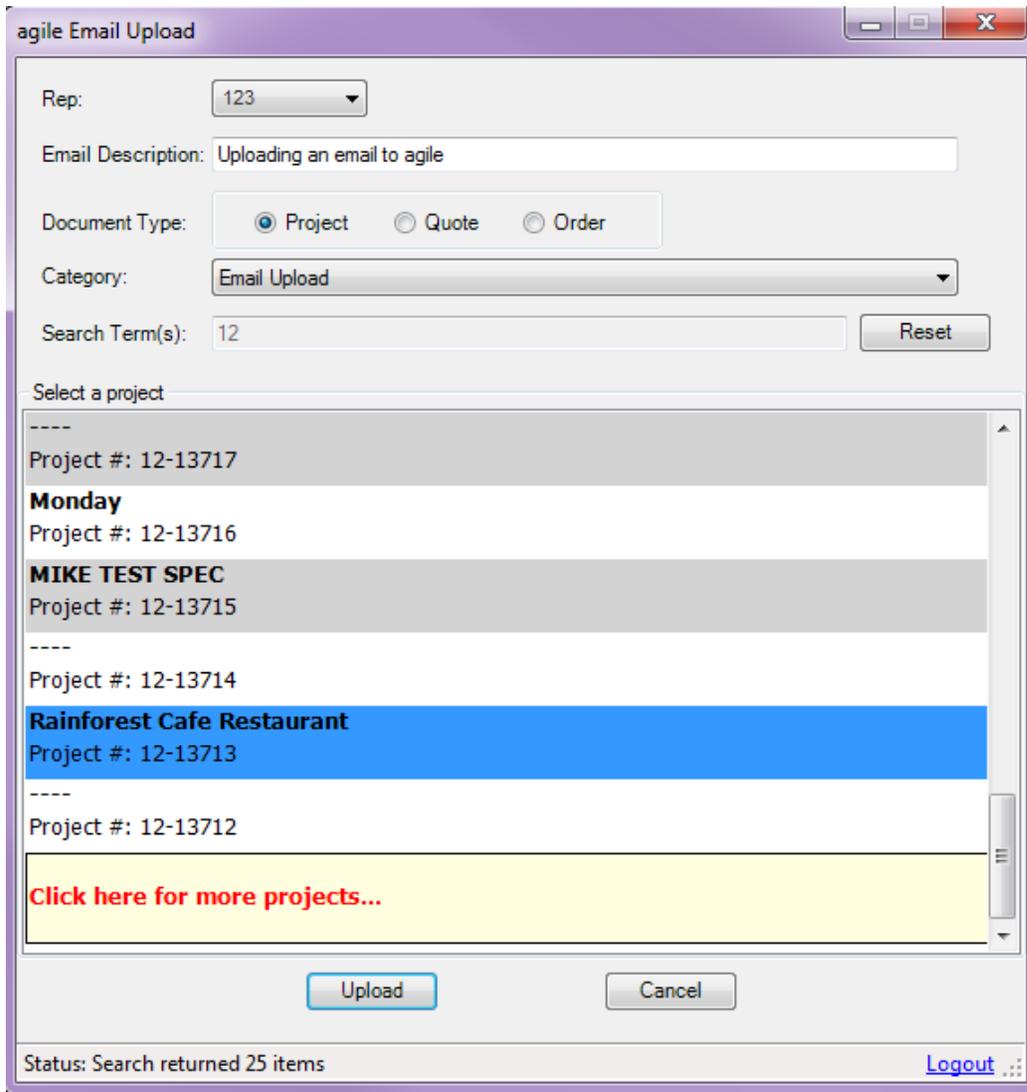
At the bottom of the window, there are 'Upload' and 'Cancel' buttons. A status bar at the very bottom shows 'Status: Search returned 17 items' and a 'Logout' link.

- 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.

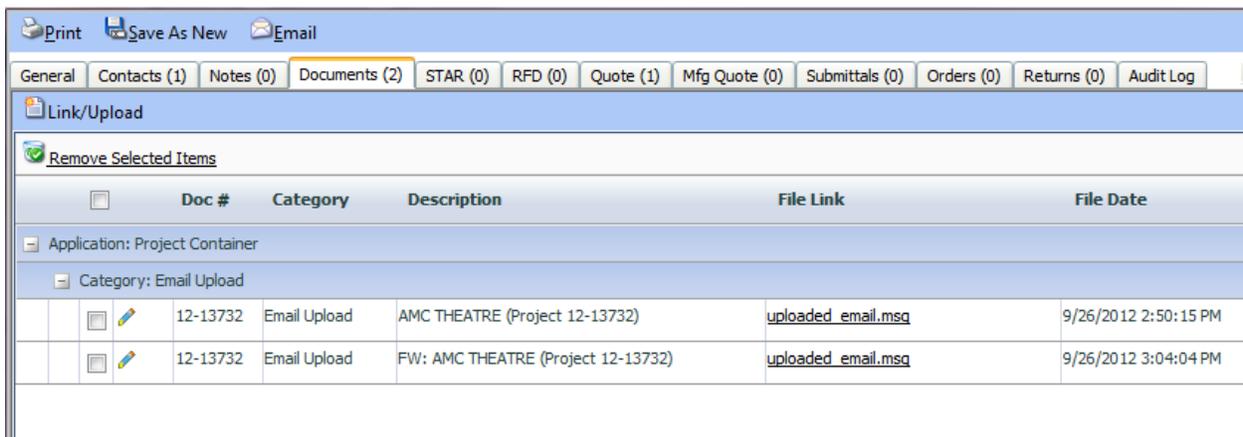
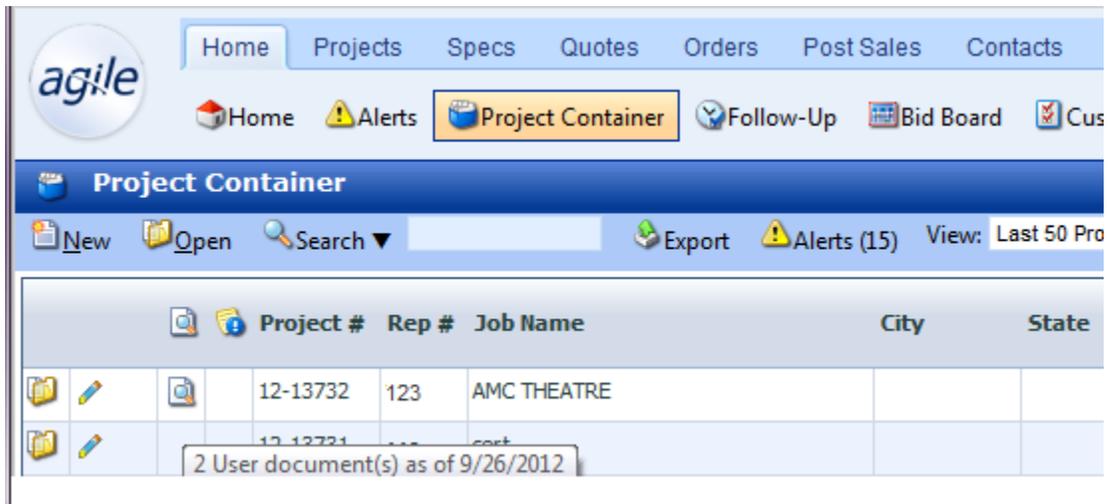
Search results more than 25 items returned.

The screenshot shows a web application window titled "agile Email Upload". It contains several input fields and a list of search results. At the top, there is a "Rep:" dropdown menu with "123" selected. Below it is an "Email Description:" text box containing "Uploading an email to agile". The "Document Type:" section has three radio buttons: "Project" (selected), "Quote", and "Order". The "Category:" dropdown menu is set to "Email Upload". The "Search Term(s):" text box contains "12", with a "Reset" button to its right. Below the search fields is a section titled "Select a project" containing a list of project entries. Each entry consists of a project number, a day of the week, and a project name. The visible entries are: "Project #: 12-13717", "Monday", "Project #: 12-13716", "MIKE TEST SPEC", "Project #: 12-13715", "Project #: 12-13714", "Rainforest Cafe Restaurant", "Project #: 12-13713", and "Project #: 12-13712". At the bottom of the list, a yellow box with a red border contains the text "Click here for more projects...". Below the list are "Upload" and "Cancel" buttons. At the bottom of the window, the status bar shows "Status: Search returned 25 items" and a "Logout" link.

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.



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

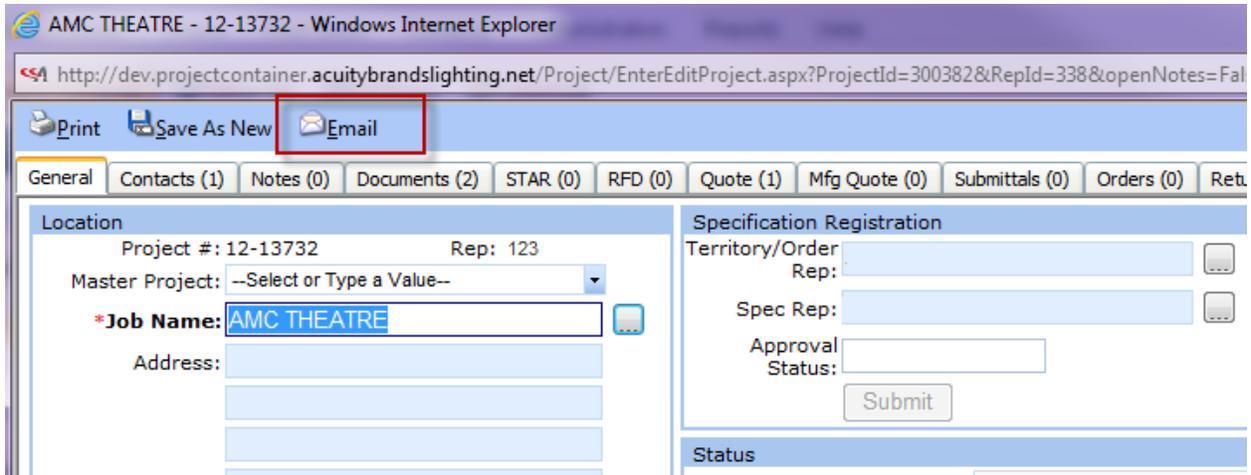


Uploading an email created from agile

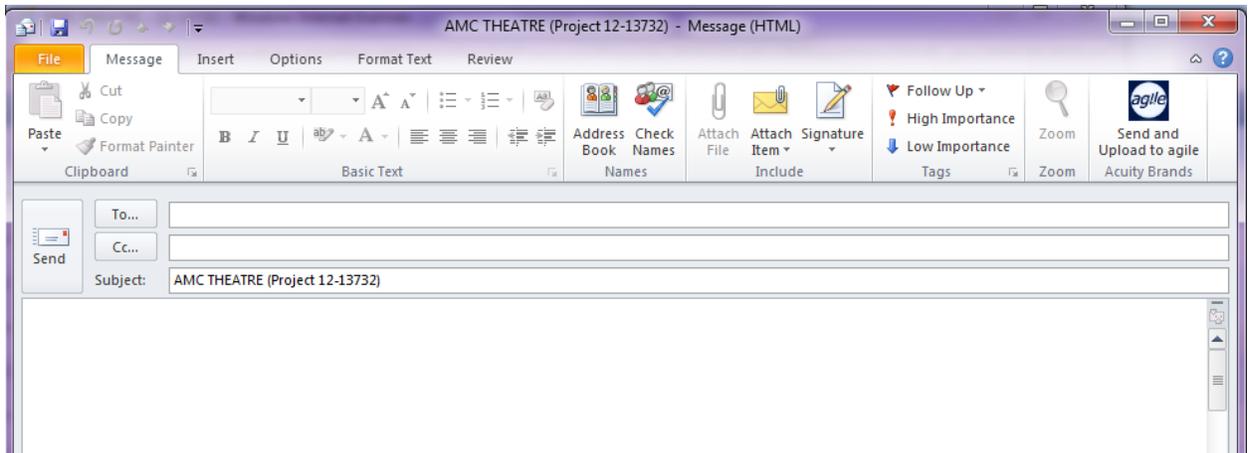
You can create an email directly from Projects, Quotes or Orders and attach a copy of the email to the documents tab.

Here is an example from Project Container:

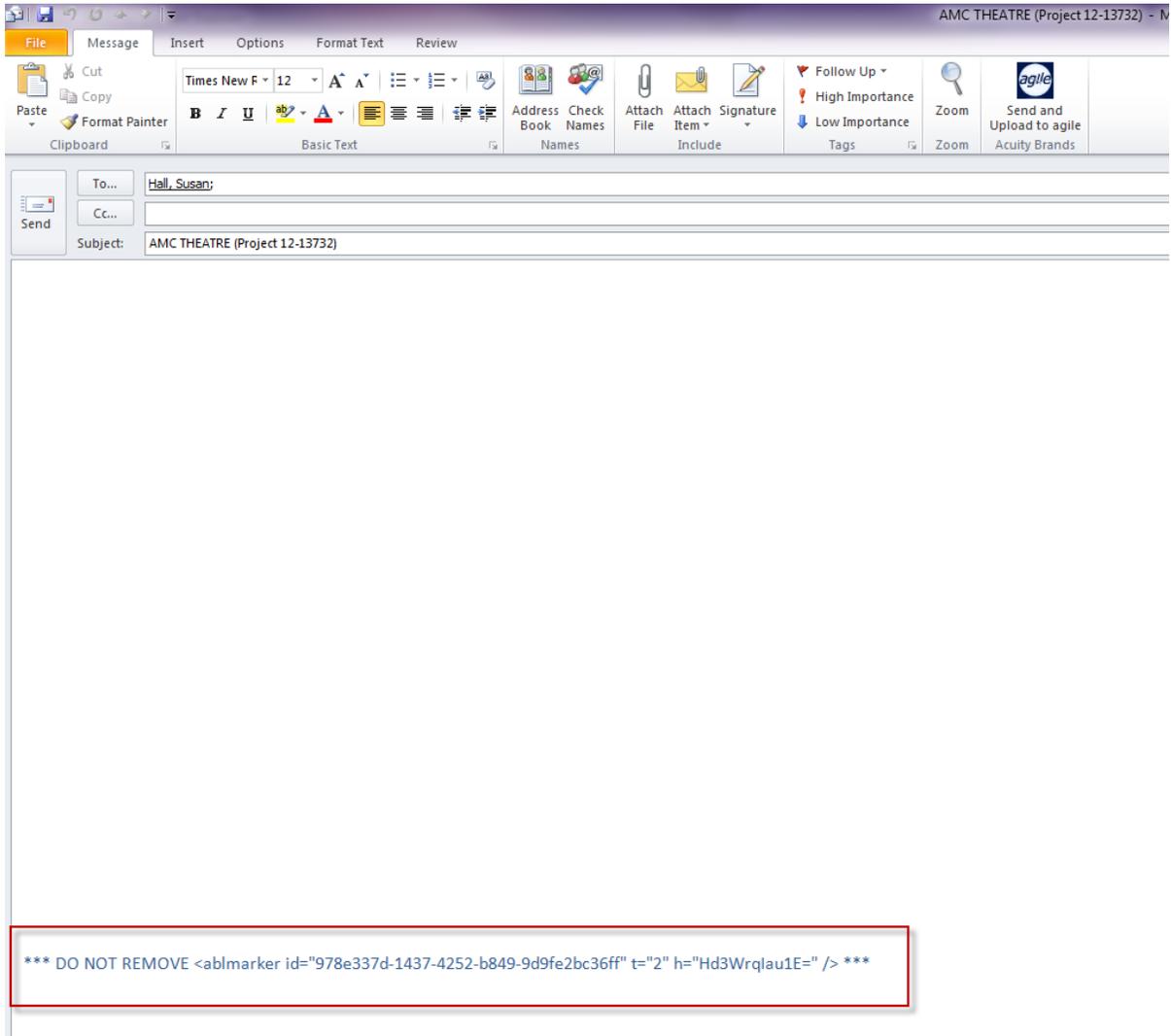
1. From an open project, click on the email icon located on the toolbar.



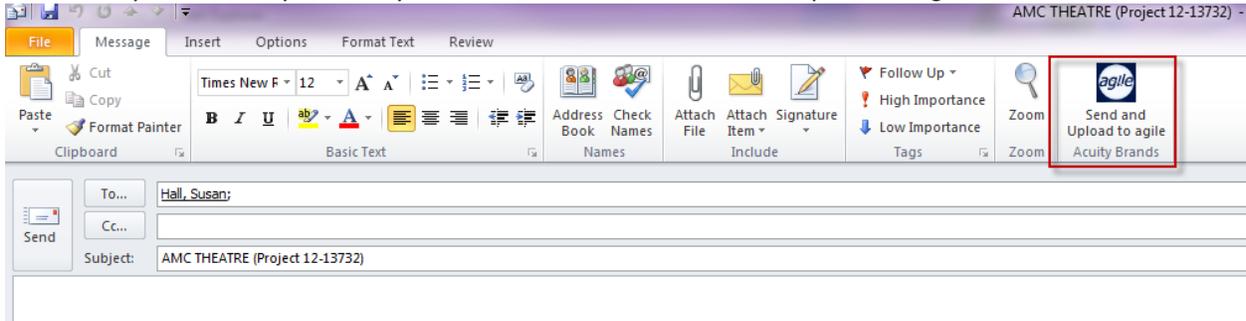
2. This will launch Outlook. The subject will default to the Job Name and document number for Projects, Quotes and Orders. Orders will also include the PO # if the PO# has been entered and saved on the order when the email is generated.



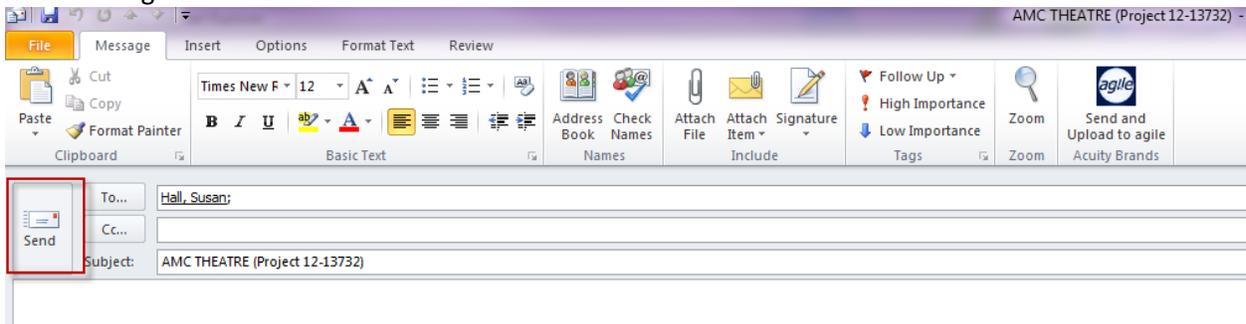
3. A **message marker** will be included in the bottom section of the email. This marker tells *agile* where to file the email thus eliminating the need for the Email Upload search screen. Changes to the message marker will interrupt this flow, so do not delete it. If the message marker is accidentally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



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

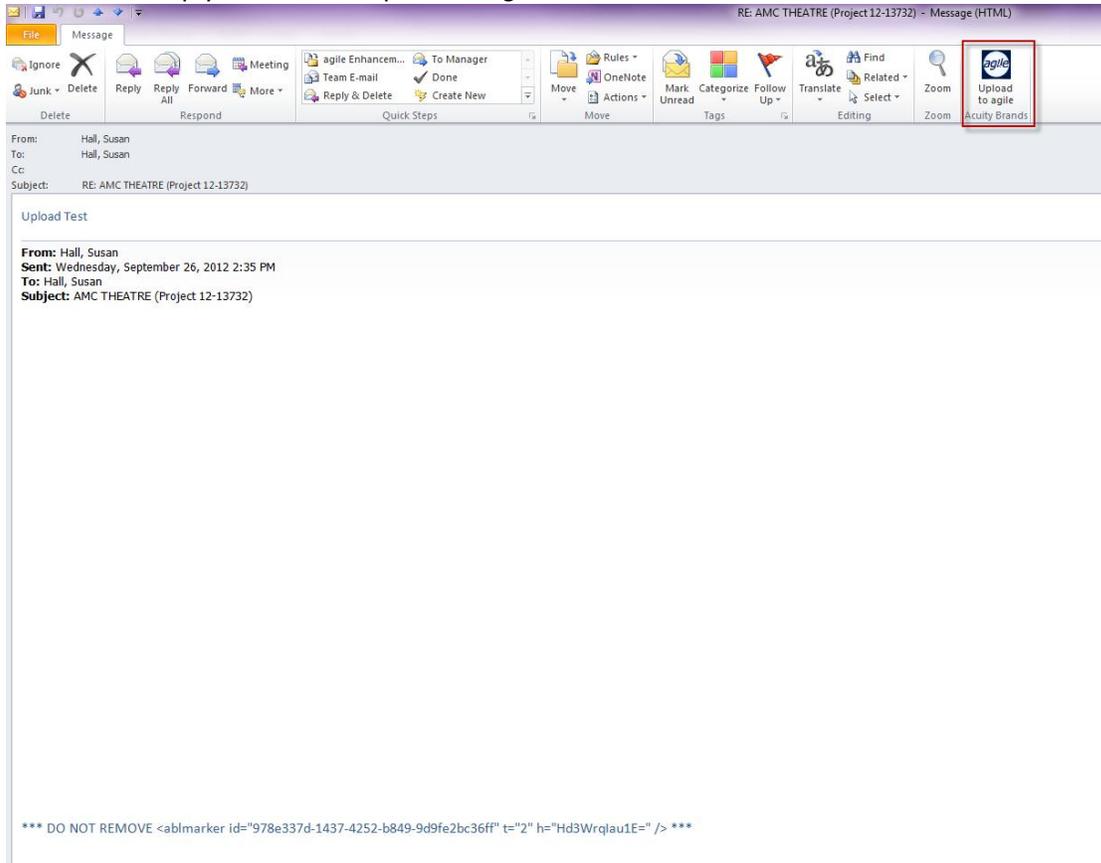


Note: if you just click the Send button, the email will be sent, but will not be uploaded to the documents tab in agile. You can choose to upload it at a later date – the message marker will remain on the email to direct it where to go.



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.



- 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*.

