## Distributor Quick Quote Convert from Product Search

In Product Search and ADC, **distributors** that have been granted access to this functionality will now be able to convert quick quotes that the agency has flagged as approved to convert. As a reminder, distributors can access product search from ADC or by logging directly into productbrowse.acuitybrandslighting.net.

To log on as the customer in Product search: filter to the specific customer number you need if not already selected.
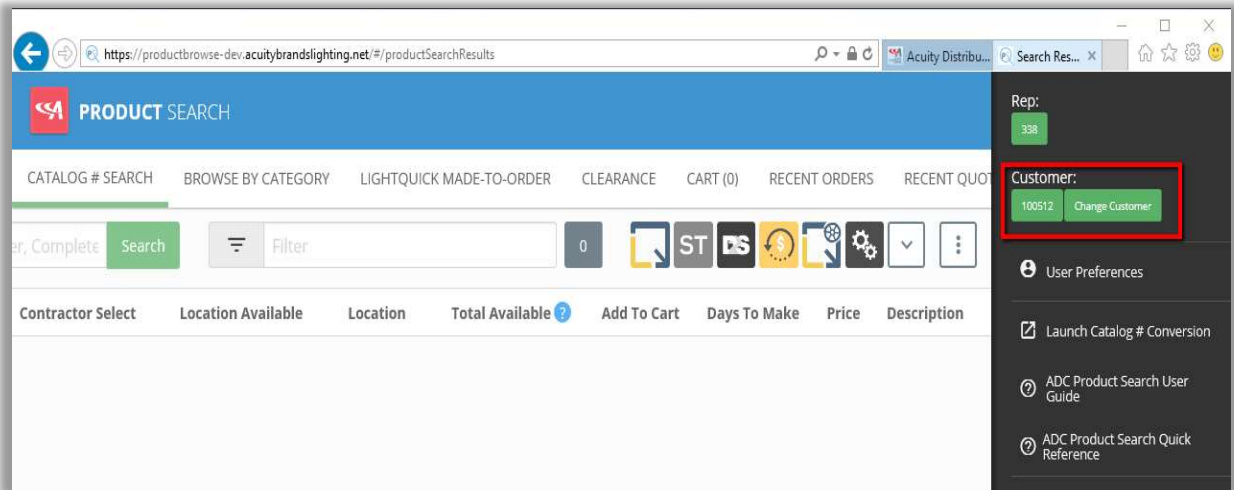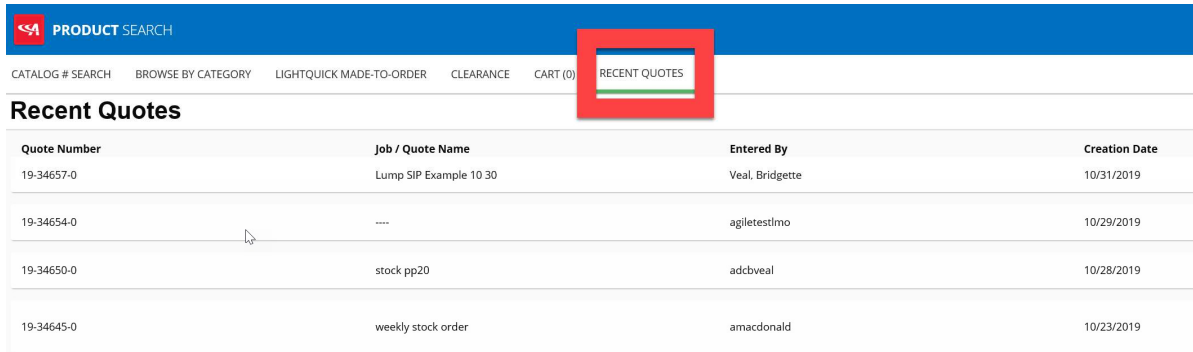

If the selected customer has been turned on and the user has the ADC role of "Request Quote" or "Place Order", you should see a Recent Quotes tab. The recent quotes tab will show all quick quotes created by the distributor as well as the agency entered quick quotes they have chosen to make visible in ADC/product search. If the agency has flagged the quote available for convert, the convert to order button will be enabled for the distributor. If the user has only the "Request Quote" role they will be able to view quotes but not convert to order.

**Only distributors can convert via product search / ADC. Agents should convert using agile.

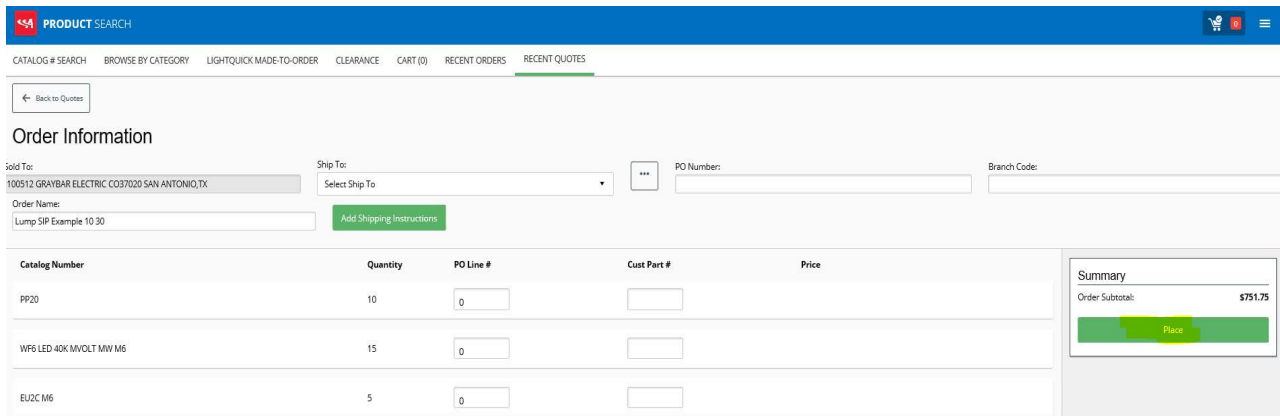| Quote Number	Job / Quote Name	Entered By	Creation Date
19-21745-0	LUMP CIP TEST 2	Veal, Bridgette	12/3/2019
19-21741-0	----	Echols, Brandon	11/27/2019
19-21736-1	LOW LUMP TEST	Veal, Bridgette	11/26/2019
19-21735-0	No CIP quote test	Veal, Bridgette	11/26/2019
19-21734-0	UNIT CIP	Veal, Bridgette	11/26/2019
19-21733-0	Lump CIP Two Lines	Veal, Bridgette	11/26/2019
19-21732-0	Lump One Line	Veal, Bridgette	11/26/2019

You will also see the same quotes tab in ADC.

To convert these quotes to an order, the distributor user will also need to have the ADC role of "place order". When the quote has been located, they will click the View and Convert to Order button.

The quote lines will be pulled over into the Order Information screen. This is where they'll be able to set the ship to, PO number, double check the bill of material, etc. To place the order with Acuity they will click the Place Order button. **If the quote has expired, LOW, or UNK pricing, convert to order will fail.

The Send Emails dialog will launch, and they can enter any additional email addresses to send the order confirmation to and click ok.
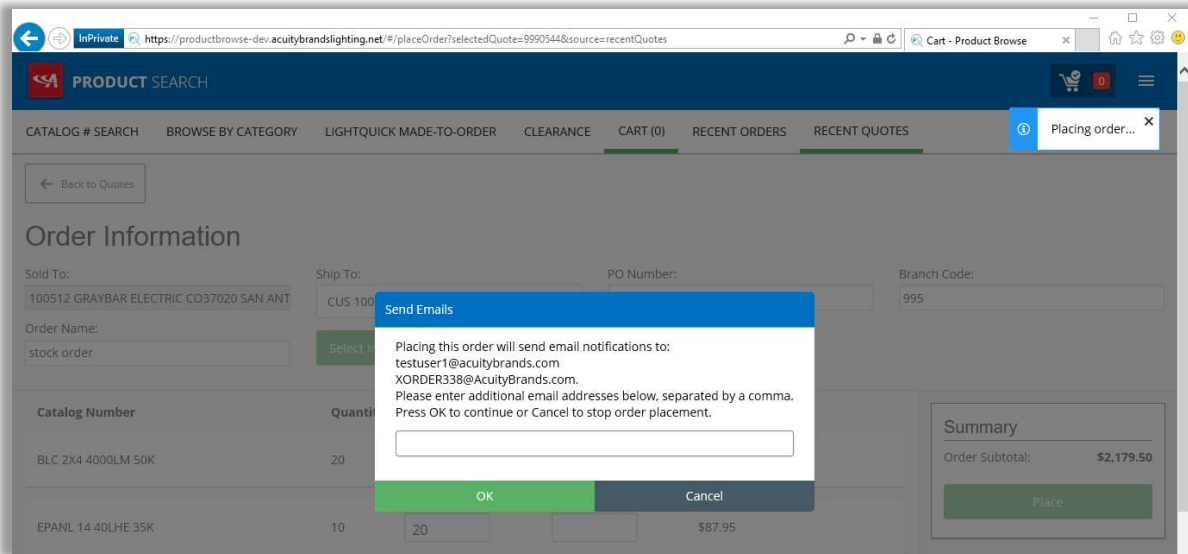
The order will now be placed. The order will also now be visible on the Recent Orders tab.
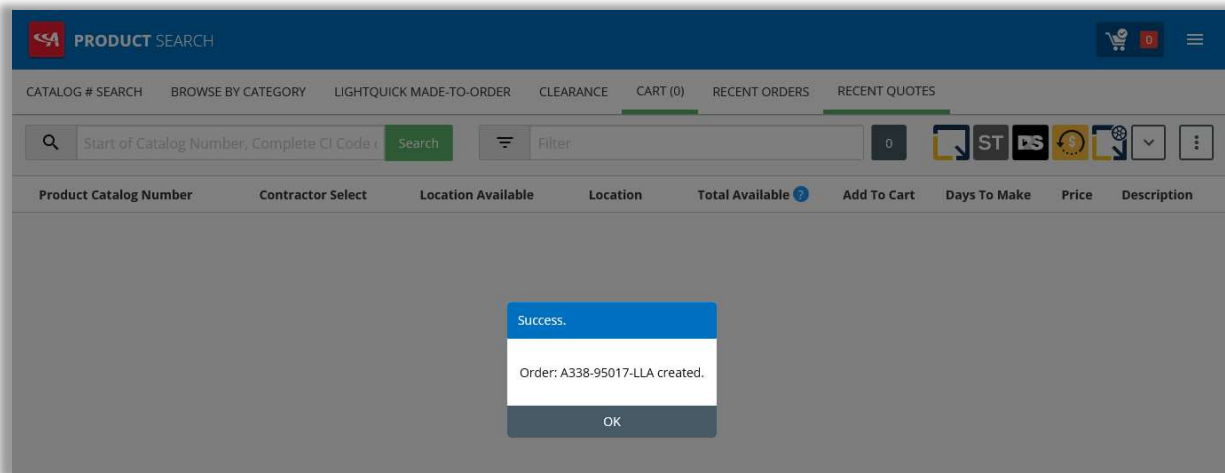
Using product search to convert:

Using ADC to convert:

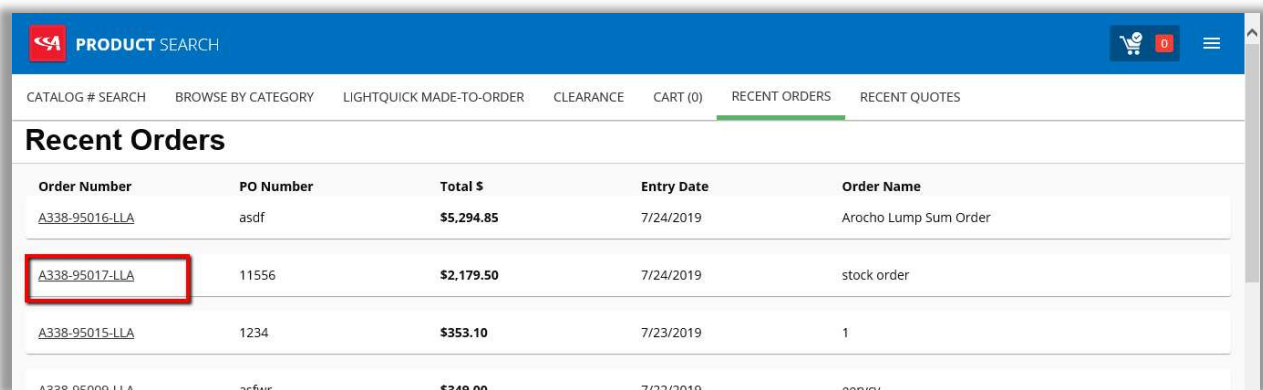**Agents** will indicate which quick quotes are visible to a distributor in ADC/product search as well as which ones will be available to convert. This will take place on a new tab called ADC within the agile quick quote. Distributor submitted quick quotes will come in with the visible flag already checked but it can be unselected by the agent if needed.

Select the visible in ADC box for the distributor to see it in product search. Only 1 version of the quote can be visible in ADC. If the quote is at or above lowest authorized or has been price approved by the AQD, you will be able to select the Approved for Convert box. This will allow the distributor to convert this quote to an order in product search.

Quotes that are agency created in product search will by default be visible in ADC and Available for Convert.

Whether the quote is created in product browse or from agile quotes, make sure you select the applicable customer.

Frequently Asked Questions:

Can CIP be on a quote for the distributor to convert?

- Yes, CIP can be added to the Quote and sent to the distributor after approval. If Lump CIP is selected the unit pricing will be hidden from the distributor

How do I hide unit pricing from the quote?

- Add the office instruction "Lump Sum Order" to the quote which will also convert to the order when the distributor converts from ADC

What happens if a customer sends AEL product to be quoted?

- Tell the customer to contact their local AEL rep

How will the customer be notified that the quote is approved to convert?

- Similar to what the agency does today when issuing a quote, select the print button from within Agile Quick Quote and email a copy to them with a note that it can be converted within ADC now. See screenshots below for further reference.
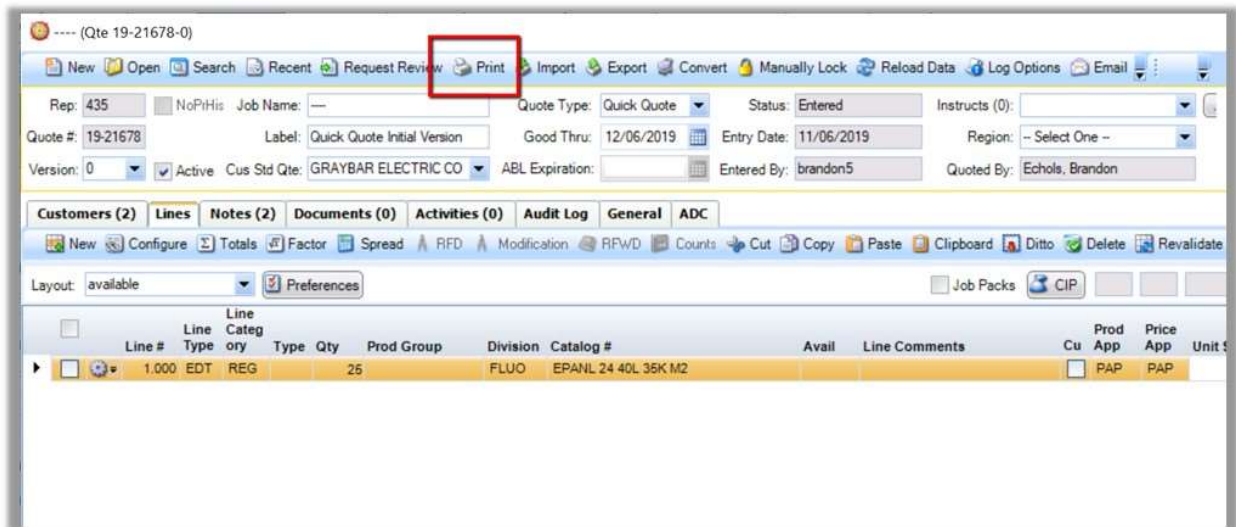
Print Quote: GRAYBAR ELECTRIC CO INC-AUSTELL, GA (ABL Distributor)

Print | History

Print Options

Type: Customer Quote

Quoted To: GRAYBAR ELECTRIC CO INC-AUSTEL

Quoted For: -- Select One --   Counts: Base Qty

Language: English

Price Column: Base Price   Quote Total: $2,062.50

Lamps: Include Lamp Lines

Price Visibility: ☐ Print Unit $ ☐ Print Ext $ ☐ Print Manufacturer Totals
☑ Print Total $ ☑ Print Subtotals

Total $ Override: ☐ [_____]

Product Options

☑ Print "Manufacturer"   ☑ Print "Qty"   ☐ Print Quote Label
☑ Print "Catalog #"   ☑ Print Line Comments   ☐ Print "Available"
☐ Print "UPC"   ☐ Print "Item #"   ☐ ABL Division Overwrite
☐ Print Consisting of Lines ☐ Print "Consisting of Lines" Prices ☐ Print Special Terms
☐ Print Assembled From Lines ☐ Print Assembled From Line Prices   ☐ Print Internal Comments
☐ Print Freight Terms   ☐ Suppress Zero Quantity Lines ☐ Print Mfg Totals Summary
☐ Print Order Minimums   ☐ Include Group Header in Subtotal ☐ Print Grid Lines

Delivery Options

To: Hugues, Rich (richard.hugues@graybar.com)

☐ Copy myself (E-mail only)   ☐ Automatically E-mail on Send
◉ Separate E-mail for each contact ○ One E-mail with all contacts BCC

Attachments: --- Quote 19-21678-0.pdf

Subject: Quote: --- (19-21678-0)

Message: [_____]

Notes

[Add A Note]

Sort Order		Category	Note
1	☑	Print	All Acuity Brands Lighting published Terms and Conditions apply. * Standard finishes included unless otherwise indicated.
2	☑	Print	All Acuity Non-Stock material is non-returnable.

Quote Format

Quote Format: PDF   ☐ Include Items Only Excel on Send

Save Options

☑ Save to Documents on Print   ☐ Use Message Marker

User Print Preferences

Save default for Customer Quote   [Save] [Clear]

[Preview] [Print] [**Send**] [Close]

Quote: ---- (19-21678-0); To: GRAYBAR ELECTRIC CO INC - Message (HTML)

File | **Message** | Insert | Options | Format Text | Review | Help   Tell me what you want to do

Calibri (Bo... 11

Paste   B I U ...
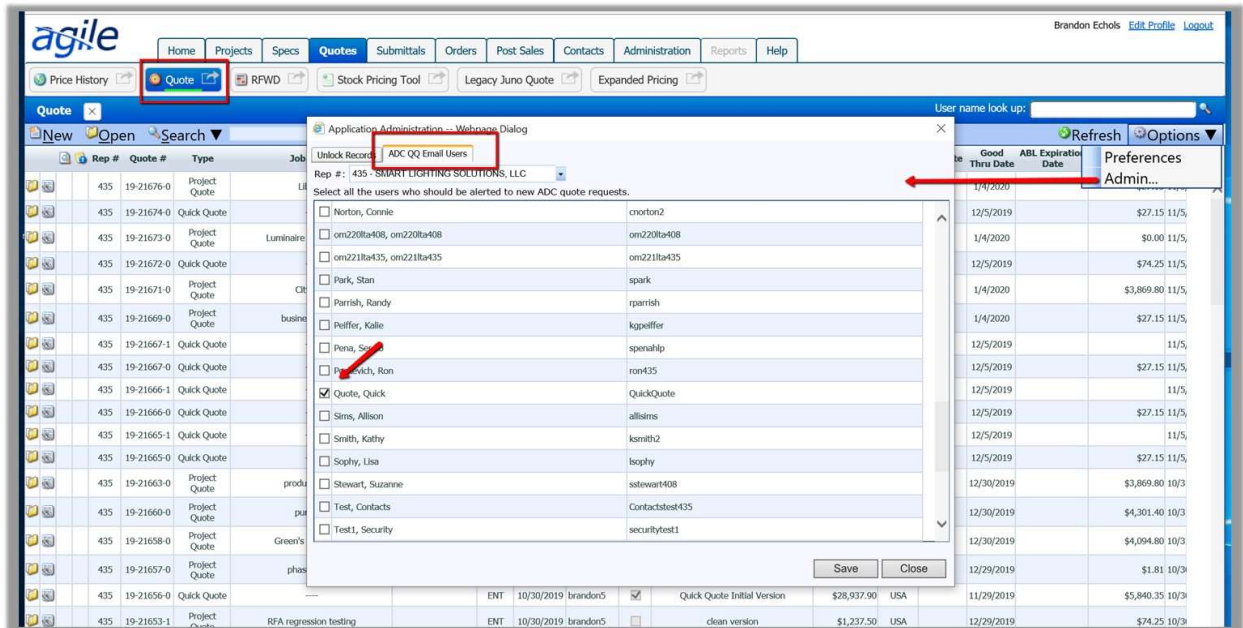
To: richard.hugues@graybar.com

Cc:

Subject: Quote: ---- (19-21678-0); To: GRAYBAR ELECTRIC CO INC

---- Quote 19-21678-0.pdf
35 KB

Here is the quote

Who at the agency will receive an email when the distributor requests the quote?

- The email recipients are managed in the Agile Quote Dashboard within the Admin tab. The tab is called ADC QQ email (reference screenshot below).

When generating a quote to send to the distributor for them to convert, how do I send them a note?

- Add notes to the Line Comments which will be visible to the distributor in ADC

Is requesting a quote in ADC a new functionality for distributors?

- No, requesting a quote isn't a new functionality and has been available to distributors for years. However, to request a quote, they must have access permissions to "Request Quote." This will also give them visibility to the new "Recent Quotes" tab in both product search and ADC homepage.

What permissions are required to convert a quote to an order in ADC?

- A distributor must have permissions to "Place Order" within the ADC access tab that the agency manages. This will give the visibility to the new "Recent Quotes" tab in both product search and ADC homepage.

Can I send a project quote to the distributor for them to view/convert within ADC?

- No, this functionality is for Quick Quotes only.

Can I send a Quick Quote to the distributor and have them view/convert within ADC?

- Yes, within the quotes app there will is a new ADC tab and both "Visible in ADC" and "Approve for Convert" will need to be checked. Also, must select a customer.

Why can't the customer view the quote after I've sent it to them?

- Ensure the customer has correct permissions within ADC (Request Quote or Place Order) and both "Visible in ADC" are checked in the quotes app and the appropriate customer number was selected

Why can't the customer convert the quote they see after I've sent it to them?

- Ensure the customer has correct permissions within ADC (Place Order) and "Approve for Convert" are checked in the quotes app and the appropriate customer number was selected.

How many versions of the quote can the distributor see in ADC?

- There can only be one version flagged and available to convert. The agency will need to manage if there are multiple versions to a quote to ensure the correct one is selected for both "Visible in ADC" and "Approve for Convert."

Are there any limitations to an agent setting the ADC Flags in the Quotes app?

- Yes, if there is UNK or LOW pricing the quote will need to be sent to AQD for processing. Also, it must be valid product.

Can the distributor revise the quote after the agency approval?

- No, either a new quote will need to be requested or the agency can revise the quote on their end

What is the commission level?

- Follows the commission curve based off the pricing that is selected when processing the quote

Can the distributor convert the quote to an order multiple time?

- Yes, as long as all lines still have price approval (no LOW's or UNK's). A quote with a MAP price, can only be converted once.

Can the distributor pick and choose lines to convert and/or change quantities?

- No, either a new quote will need to be requested or the agency can revise the quote on their end

Who at the distributorship can see the "Recent Quotes" tab?

- Anyone with the appropriate permissions at that location can see the tab and all the quotes

When I send a quote through Product Search to the distributor will it automatically be available to view and convert in ADC?

- Yes, the Agile Quick Quote will automatically check both flags. Reason being is because product can't be priced below target through Product Search

How long will a quote be visible in their "Recent Quotes" tab in ADC?

- After 60 days the quote is no longer in their view

Can the distributor select a manual ship to when they convert the quote?

- Yes, as long as the address is in the respective territory of the local agent, they can select the icon next to the "Ship To" and complete the manual address.