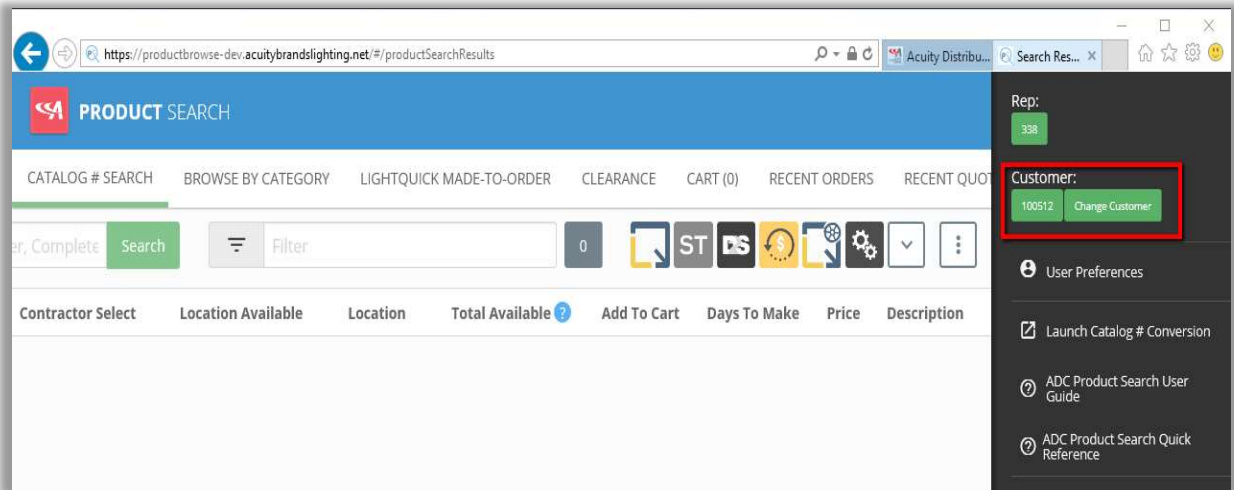


Distributor Quick Quote Convert from Product Search

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.



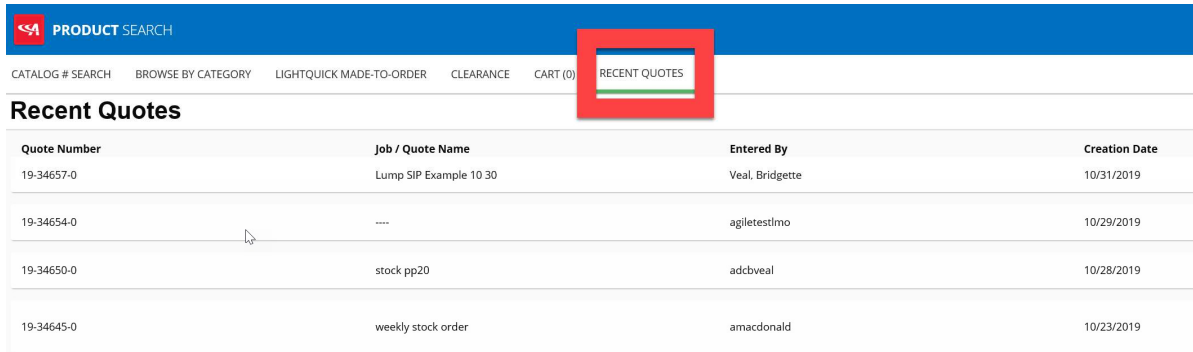
If the selected customer has been turned on and the user has the ADC role of “Request Quote” or “Place Order”, you should see a Recent Quotes tab. The recent quotes tab will show all quick quotes created by the distributor as well as the agency entered quick quotes they have chosen to make visible in 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.**

The screenshot shows the 'Recent Quotes' tab in the Product Search interface. The table displays a list of quotes with columns for Quote Number, Job / Quote Name, Entered By, and Creation Date.

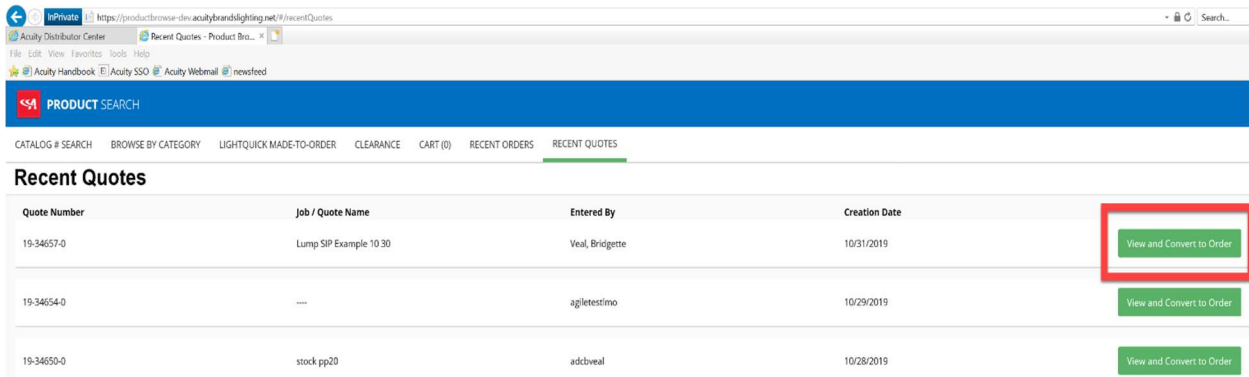
Quote Number	Job / Quote Name	Entered By	Creation Date
19-21745-0	LUMP CIP TEST 2	Veal, Bridgette	12/3/2019
19-21741-0	---	Echols, Brandon	11/27/2019
19-21736-1	LOW LUMP TEST	Veal, Bridgette	11/26/2019
19-21735-0	No CIP quote test	Veal, Bridgette	11/26/2019
19-21734-0	UNIT CIP	Veal, Bridgette	11/26/2019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



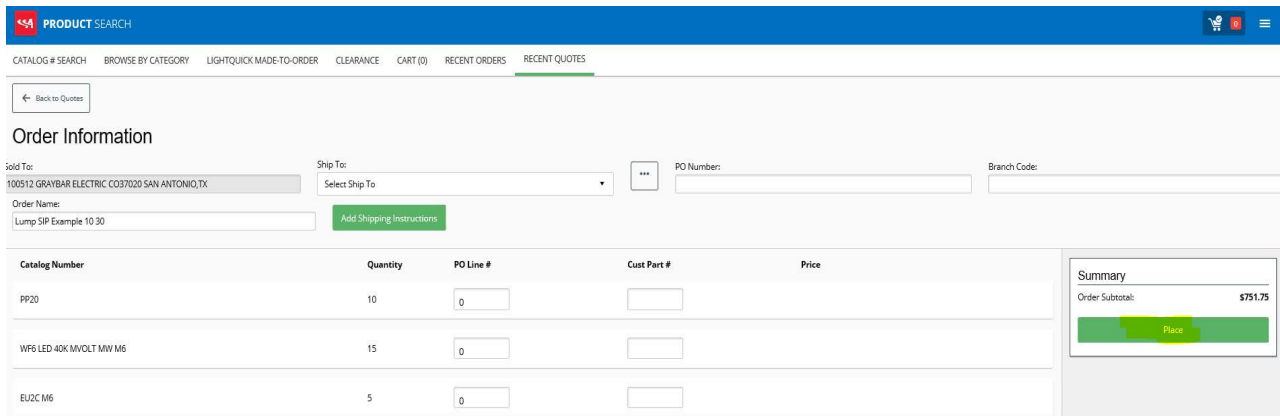
Quote Number	Job / Quote Name	Entered By	Creation Date
19-34657-0	Lump SIP Example 10 30	Veal, Bridgette	10/31/2019
19-34654-0	---	agiletestimo	10/29/2019
19-34650-0	stock pp20	adcbveal	10/28/2019
19-34645-0	weekly stock order	amacdonald	10/23/2019

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.



Quote Number	Job / Quote Name	Entered By	Creation Date	Action
19-34657-0	Lump SIP Example 10 30	Veal, Bridgette	10/31/2019	View and Convert to Order
19-34654-0	---	agiletestimo	10/29/2019	View and Convert to Order
19-34650-0	stock pp20	adcbveal	10/28/2019	View and Convert to Order

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.



Order Information

Job ID: 100512 GRAYBAR ELECTRIC CO37020 SAN ANTONIO, TX

Ship To: Select Ship To

PO Number:

Branch Code:

Order Name: Lump SIP Example 10 30

[Add Shipping Instructions](#)

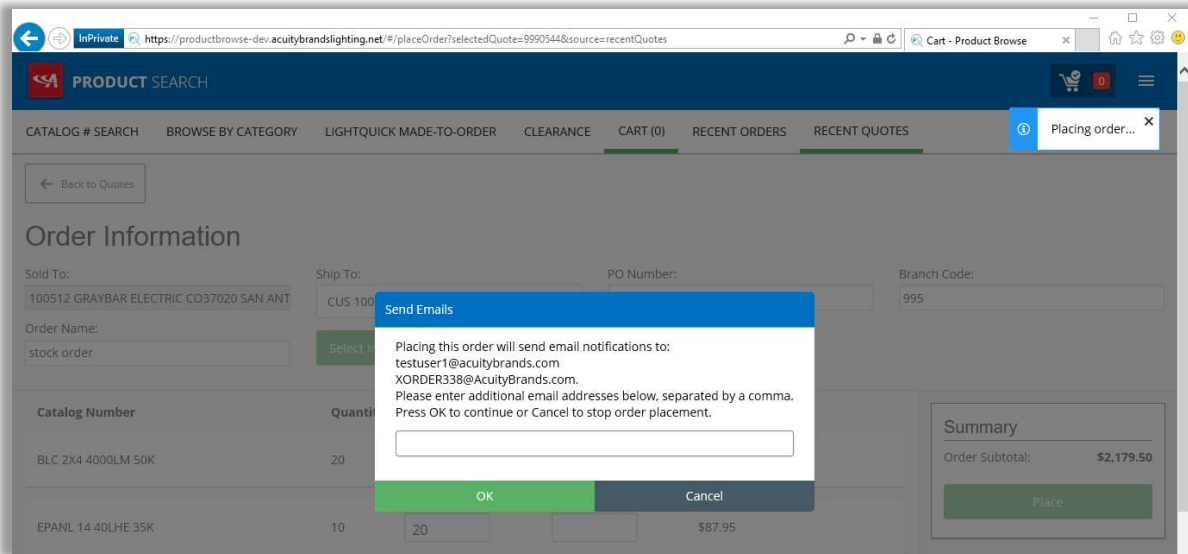
Catalog Number	Quantity	PO Line #	Cust Part #	Price
PP20	10	0		
WF6 LED 40K MVOLT MW M6	15	0		
EUZC M6	5	0		

Summary

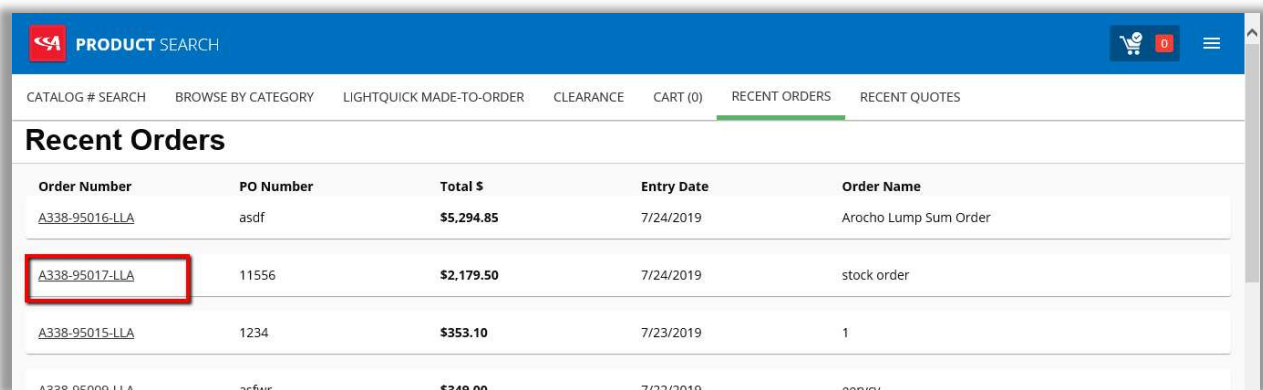
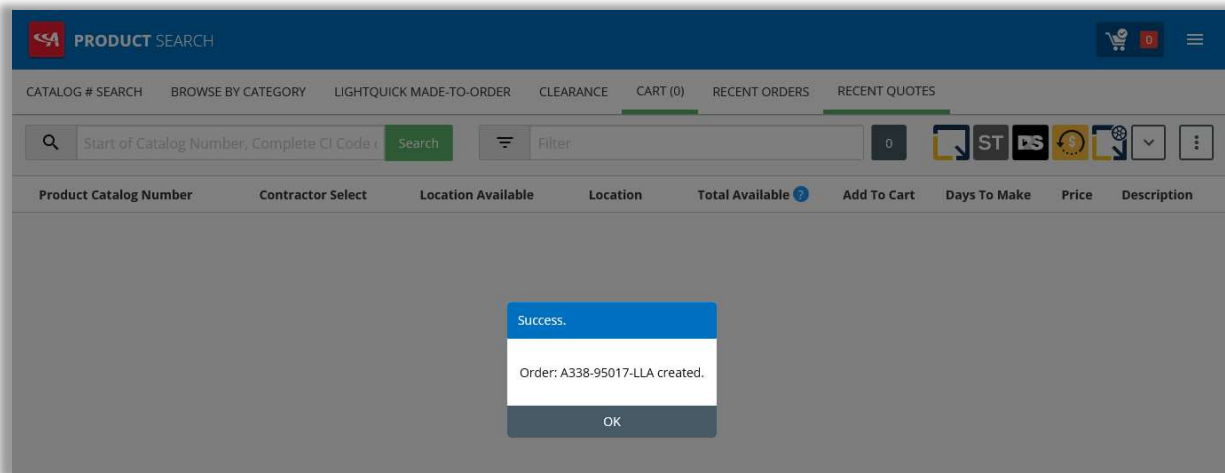
Order Subtotal: **\$751.75**

[Place](#)

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:

Order Number	PO Number	Total \$	Entry Date	Order Name
A338-95016-LLA	asdf	\$5,294.85	7/24/2019	Arocho Lump Sum Order
A338-95017-LLA	11556	\$2,179.50	7/24/2019	stock order
A338-95015-LLA	1234	\$353.10	7/23/2019	1
A338-95009-LLA	asfwr	\$349.00	7/22/2019	eevicy

Using ADC to convert:

Quote Number	Job / Quote Name	Entered By	Creation Date	
19-34657-0	Lump SIP Example 10 30	Veal, Bridgette	10/31/2019	View and Convert to Order
19-34654-0	----	agiletestlmo	10/29/2019	View and Convert to Order
19-34650-0	stock pp20	adcbveal	10/28/2019	View and Convert to Order

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.

---- (Qte 19-33635-0)

Rep: 338 NoPiHis Job Name: --- Quote Type: Quick Quote Status: Entered Instructs (0): Ext Unit
 Quote #: 19-33635 Label: Quick Quote Initial Version Good Thru: 08/23/2019 Entry Date: 07/24/2019 Region: -- Select One -- Ext Total Unit
 Version: 0 Active Cus Std Qte: -- None Selected -- ABL Expiration: Entered By: brandon5 Quoted By: Echols, Brandon Total Comm (

Customers (1) Lines Notes (6) Documents (0) Activities (0) Audit Log General **ADC**

Line #	Line Type	Line Category	Type	Mfg	Qty	Qty Per	Division	Prod Group	Catalog #	Item #	Warranty Deviation Request ID	Line Comments	Cu	Prod App	Price App	Unit
1.000	EDT	REG		ABL	25		FLUO		EPANL 14 40L 40K	*247U56				PAP	PAP	

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.

The screenshot shows a software window titled "(Qte 19-33635-0)". The interface includes a menu bar with options like New, Open, Search, Recent, Request Review, Print, Import, Export, Convert, Manually Lock, Reload Data, Log Options, and Email. Below the menu bar, there are several input fields and dropdown menus for quote information: Rep: 338, NoPiHi, Job Name: ---, Quote Type: Quick Quote, Status: Entered, Instructs (0):, Ext Unit (\$): 1,745.00, Quote #: 19-33635, Label: Quick Quote Initial Version, Good Thru: 08/23/2019, Entry Date: 07/24/2019, Region: -- Select One --, Ext Total Unit (\$): 1,745.00, Version: 0, Active, Cus Std Qte: -- None Selected --, ABL Expiration:, Entered By: brandon5, Quoted By: Echols, Brandon, Total Comm (%): 6.00, and Total Comm (\$): 104.75. Below these fields, there are tabs for Customers (1), Lines, Notes (6), Documents (0), Activities (0), Audit Log, General, and ADC. The ADC tab is selected, and the "ADC Quote Settings" section is visible. A red box highlights two checkboxes: "Visible in ADC" and "Approved for Convert".

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?

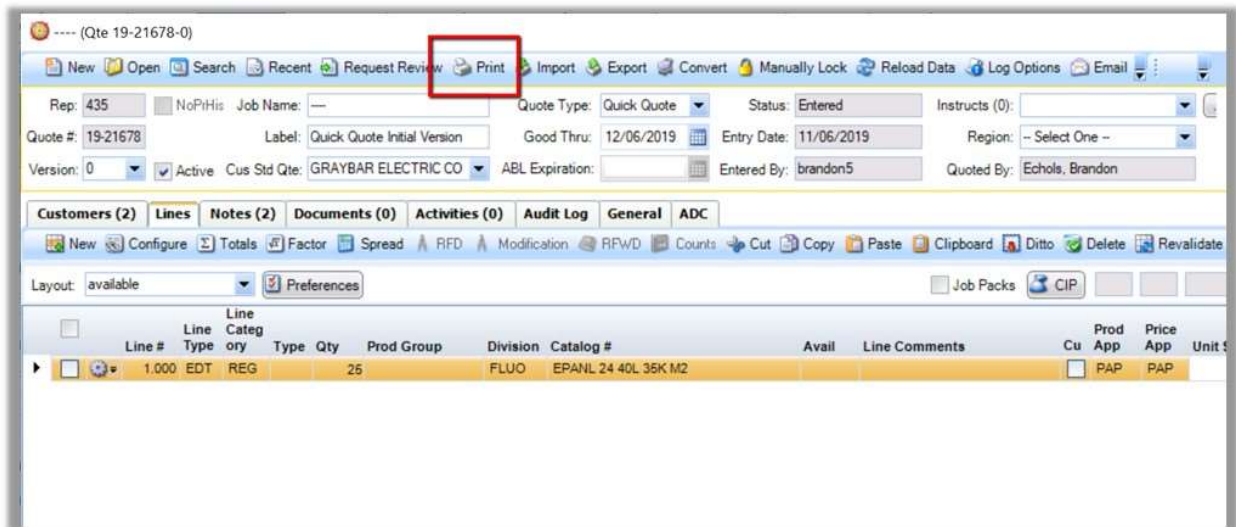
- Add the office instruction “Lump Sum Order” to the quote which will also convert to the order when the distributor converts from ADC

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-AUSTELL, GA
 Quoted For Language: -- Select One --
 Counts: Base Qty

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 #"
 Print Consisting of Lines Print "Consisting of Lines" Prices ABL Division Overwrite
 Print Assembled From Lines Print Assembled From Line Prices Print Special Terms
 Print Freight Terms Suppress Zero Quantity Lines Print Internal Comments
 Print Order Minimums Include Group Header in Subtotal Print Mig Totals: Summary
 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

Paste X Cut Copy Format Painter Clipboard Basic Text Names Include Tags Voice Adobe Sign My Templates

To: richard.hugues@graybar.com

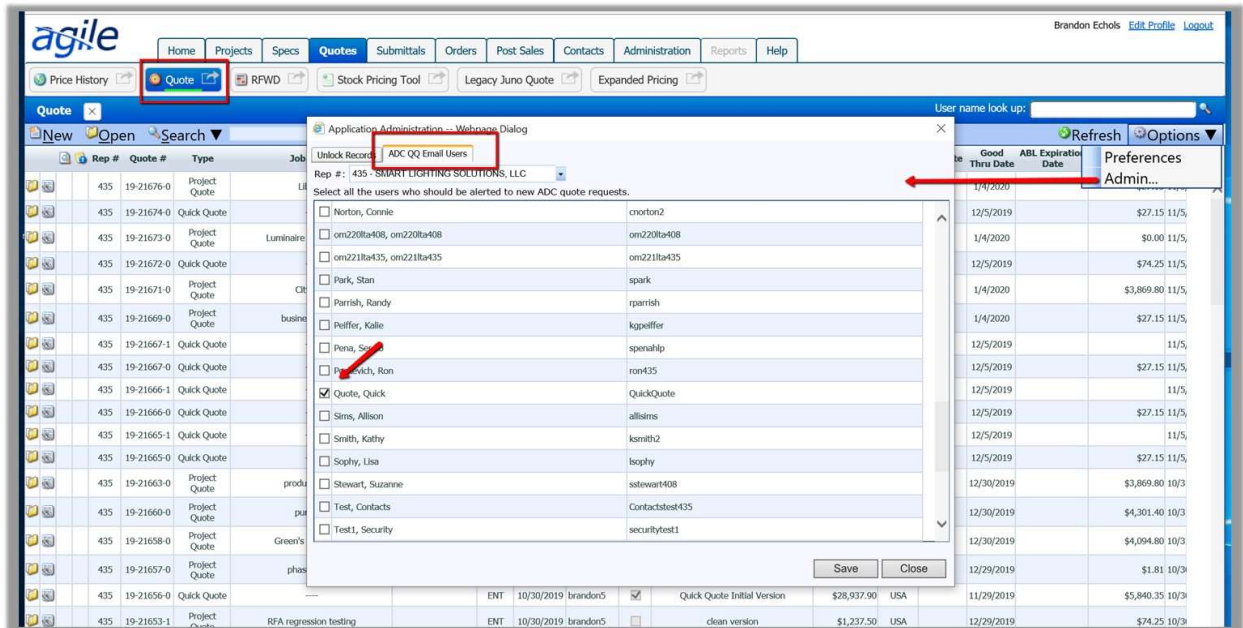
Subject: Quote: --- (19-21678-0); To: GRAYBAR ELECTRIC CO INC

--- 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 be 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.