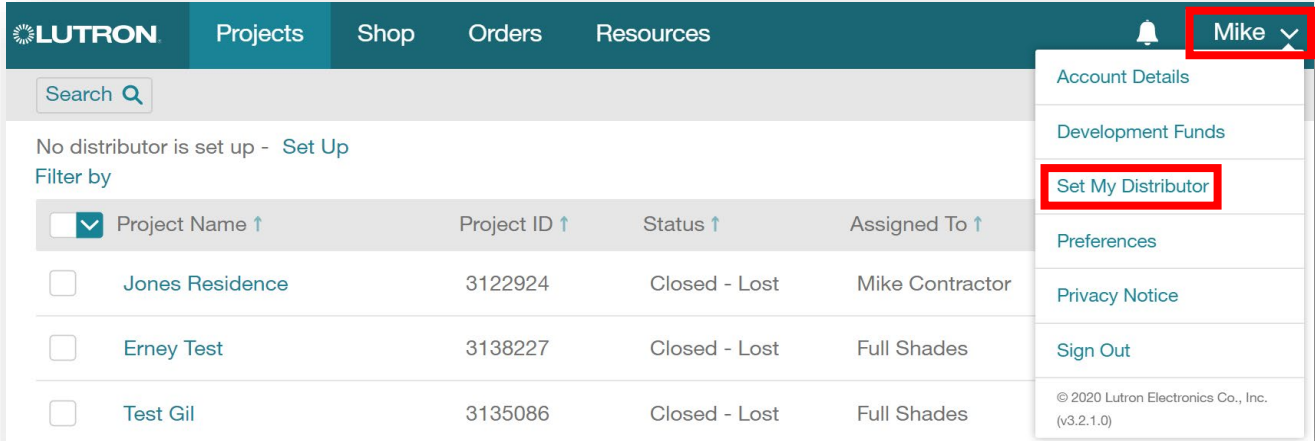


# myProjects- Contractor Requesting Pricing from Group One

Using myProjects, a contractor will be able to route a pricing request to their distributor. Follow the sequence below to see how Mike the Contractor was able to route a pricing request to Joe the Distributor.

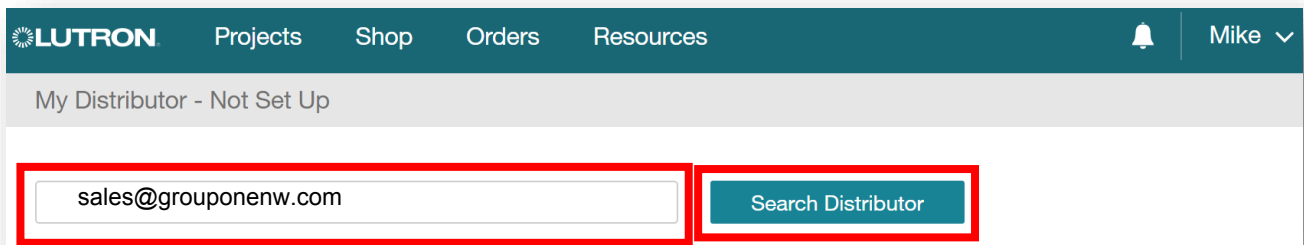
1. Mike Contractor selected his distributor by clicking the **Set my Distributor** option.



The screenshot shows the Lutron myProjects dashboard. The top navigation bar includes 'LUTRON', 'Projects', 'Shop', 'Orders', and 'Resources'. A user profile 'Mike' is logged in, with a dropdown menu open. The 'Set My Distributor' option is highlighted with a red box. Below the navigation, a search bar is present, and a message states 'No distributor is set up - Set Up'. A table lists projects with columns for 'Project Name', 'Project ID', 'Status', and 'Assigned To'. The 'Set My Distributor' option is also highlighted with a red box in the dropdown menu.

<input type="checkbox"/> <input checked="" type="checkbox"/> Project Name ↑	Project ID ↑	Status ↑	Assigned To ↑
<input type="checkbox"/> Jones Residence	3122924	Closed - Lost	Mike Contractor
<input type="checkbox"/> Erney Test	3138227	Closed - Lost	Full Shades
<input type="checkbox"/> Test Gil	3135086	Closed - Lost	Full Shades

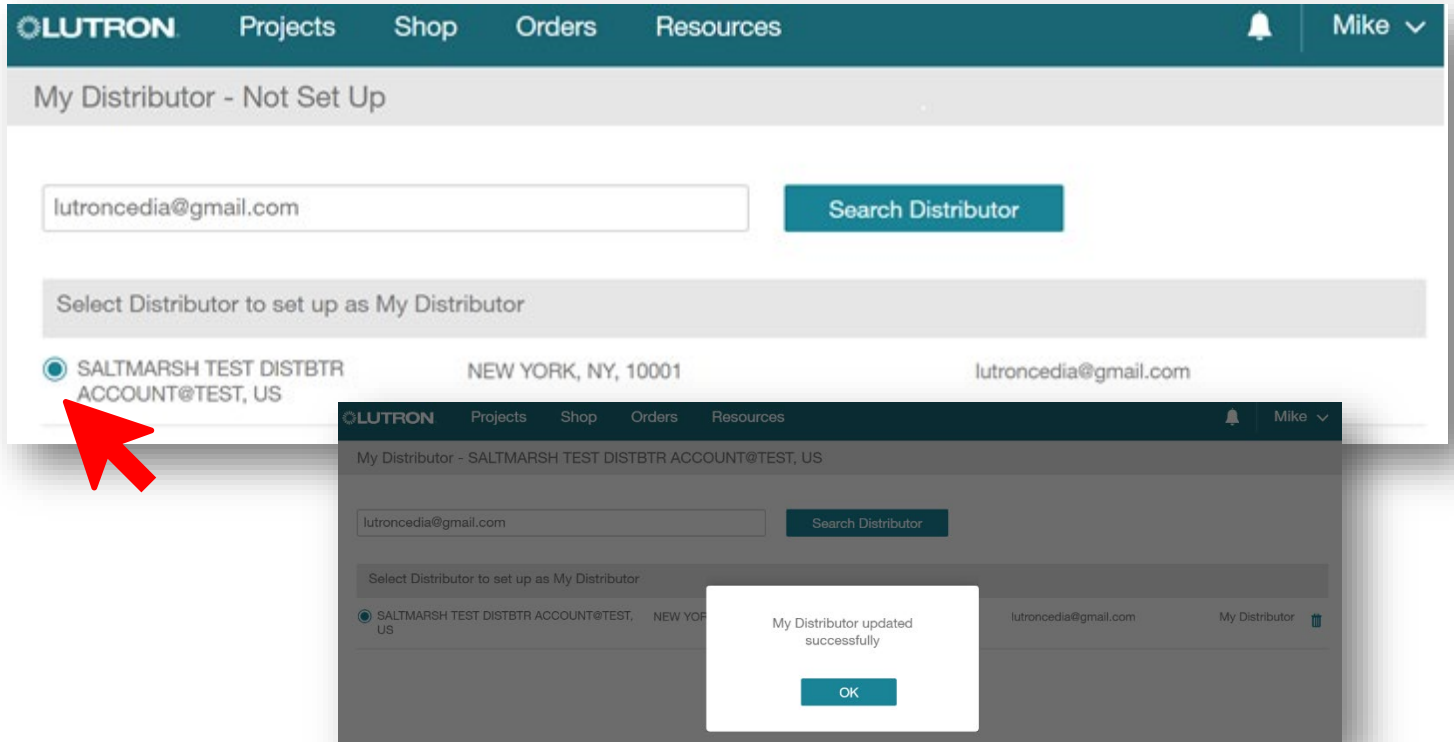
2. In the search bar, Mike Contractor entered **sales@grouponenw.com**



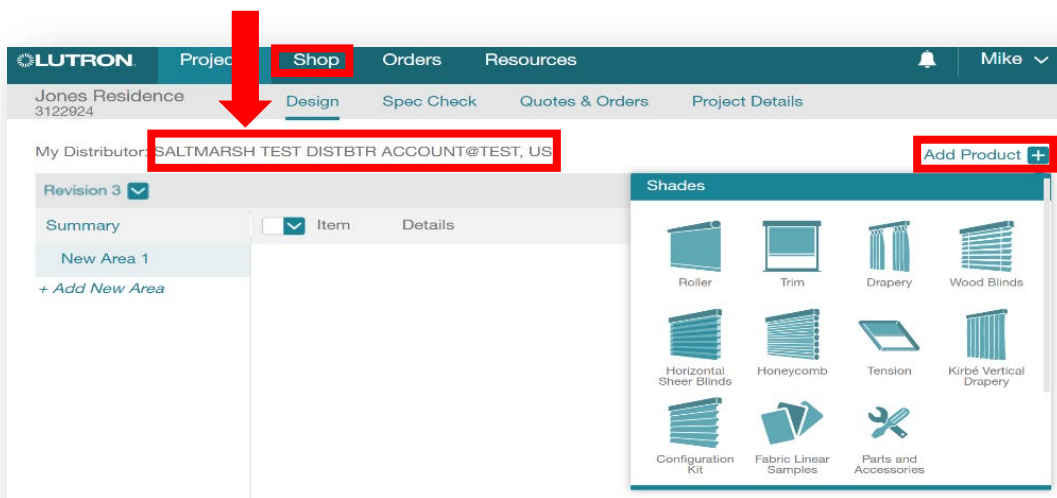
The screenshot shows the Lutron myProjects dashboard. The top navigation bar includes 'LUTRON', 'Projects', 'Shop', 'Orders', and 'Resources'. A user profile 'Mike' is logged in. Below the navigation, a search bar contains the text 'sales@grouponenw.com' and a 'Search Distributor' button is highlighted with a red box. The message 'My Distributor - Not Set Up' is displayed above the search bar.

# myProjects- Contractor Requesting Pricing from Distributor Process

3. Mike Contractor selected the Group One location

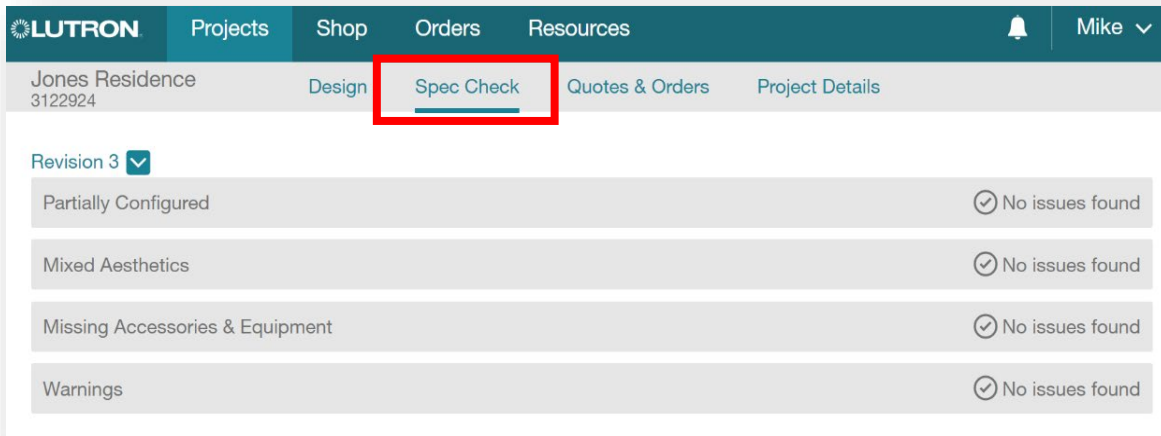


4. Mike Contractor created his project and built his bill of materials under the Design tab. Notice how his selected distributor appears here.

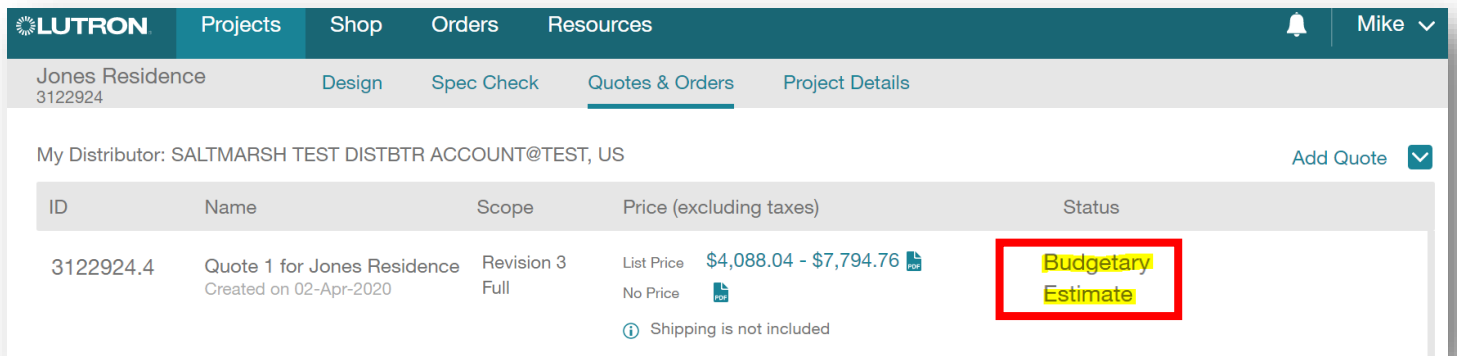


# myProjects- Contractor Requesting Pricing from Distributor Process

5. Mike Contractor moved forward and confirmed there were no Spec Check Items that needed attention.

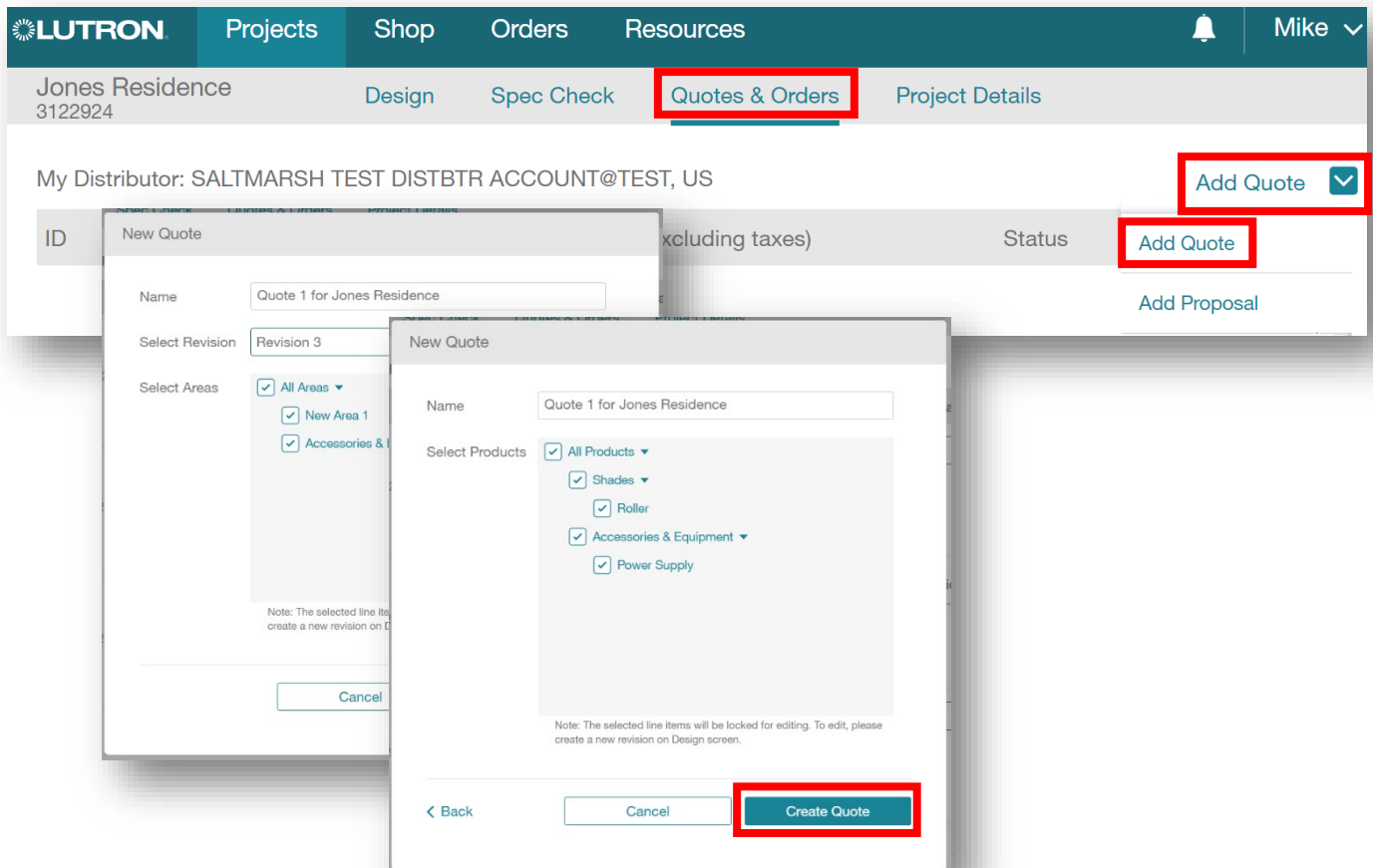


**Note:** A bill of materials cannot be quoted/ordered until all TBD items are determined. This will result in a “Budgetary Estimate” when later attempting to add a quote in the next step.

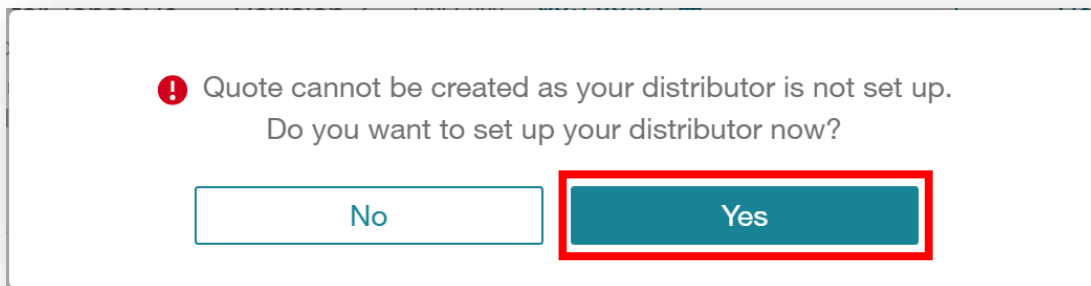


# myProjects- Contractor Requesting Pricing from Distributor Process

6. Mike Contractor then generated a list price quote for his project revision on the Quotes and Orders tab.



**Note:** If a distributor was not selected in Step 1, Mike Contractor would not be able to add a quote. He would have received the below error and be prompted to set the distributor to move forward.



# myProjects- Contractor Requesting Pricing from Distributor Process

7. Mike Contractor clicked **Request Pricing** next to the quote to generate a purchase price request to Joe Distributor.

The screenshot shows the Lutron myProjects interface. At the top, there are navigation tabs: LUTRON, Projects, Shop, Orders, Resources, and a user profile for Mike. Below this, the project name 'Jones Residence' and ID '3122924' are displayed. The 'Quotes & Orders' tab is active. A distributor email 'SALTMARSH TEST DISTBTR ACCOUNT@TEST, US' is shown. A table lists quotes, with the first one being 'Quote 1 for Jones Re...' with a list price of \$5,708.51. A 'Request Pricing' button is highlighted in a red box next to this quote.

ID	Name	Scope	Price (excluding taxes)	Status
3122924.4	Quote 1 for Jones Re... Created on 01-Apr-2020 Valid through 30-Jun-2020 11:59 PM EST	Revision 3 Full	List Price \$5,708.51 No Price Shipping is included	<b>Request Pricing</b>

The 'Request Quote' form contains the following fields:

- Project Name: Jones Residence
- Name / Quote ID: Quote 1 for Jones Residence / 3122924.4
- Distributor: SALTMARSH TEST DISTBTR ACCOUNT@TEST, US (724839)
- Contractor: FULL SHADES TRAINING US@DO NOT USE
- From: Mike Contractor <lutroncedia2@gmail.com>
- To: lutroncedia@gmail.com (with a red arrow pointing to it)
- Subject: Lutron Pricing Request - Jones Residence - 3122924
- Body: List Price.pdf, SALTMARSH TEST DISTBTR ACCOUNT@TEST, US, (with a red arrow pointing to the '+' icon to add more recipients)

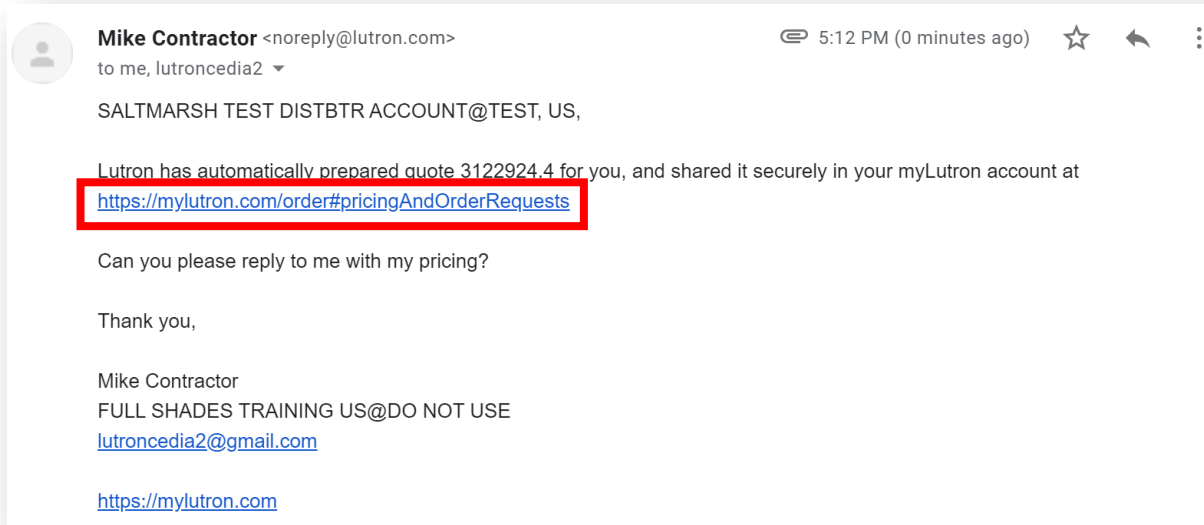
Buttons: Cancel, **Send** (highlighted in a red box)

**Note:** The email address in this field is auto populated from the distributor set up provided in Step 1. **Do not delete the prepopulated distributor email address.**

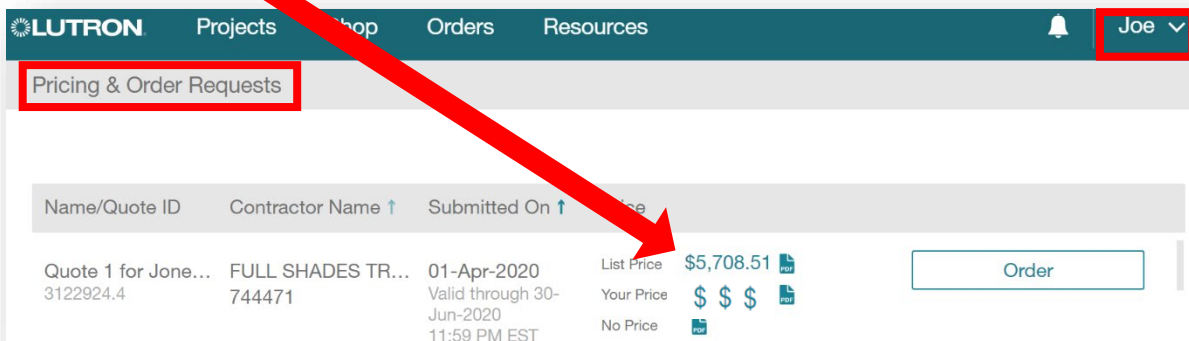
To add another recipient to receive a copy of the email notification, an additional email can be entered here.

# myProjects- Contractor Requesting Pricing from Distributor Process

8. Joe Distributor received an email notification a few minutes after Mike's request:
  - a. The email contained a quote number and a direct link to the request that Mike Contractor created.
  - b. Joe Distributor **clicked the quote link in the email** and was directed to his Contractor Requests page.



9. Here Joe viewed list price *and* his distributor price for Mike Contractor's bill of materials. There was no need for him to reach out to his local Lutron rep for his price. Distributor price is already calculated here under **Your Price**.



# myProjects- Contractor Requesting Pricing from Distributor Process

Outside of myLutron:

10. **In his own system**, Joe Distributor determined Mike Contractor's purchase price and provided him a quote.
11. Mike Contractor accepted the purchase price and submitted a purchase order to Joe Distributor referencing the Jones Residence **Quote ID number** (3122924.4).
12. Joe Distributor went back to his Contractor Requests page and clicked the **Order** button to place the order with Lutron.

The screenshot shows the Lutron myProjects interface. The top navigation bar includes 'LUTRON', 'Projects', 'Shop', 'Orders', and 'Resources'. A user profile 'Joe' is visible in the top right. Below the navigation, a tab labeled 'Pricing & Order Requests' is highlighted with a red box. The main content area displays a table with the following data:

Name/Quote ID	Contractor Name ↑	Submitted On ↑	Price
Quote 1 for Jone... 3122924.4	FULL SHADES TR... 744471	01-Apr-2020 Valid through 30- Jun-2020 11:59 PM EST	List Price \$5,708.51 Your Price \$ \$ \$ No Price

An 'Order' button is located to the right of the table row, highlighted with a red box.