

Importing a design from myProjects into D-Tools System Integrator

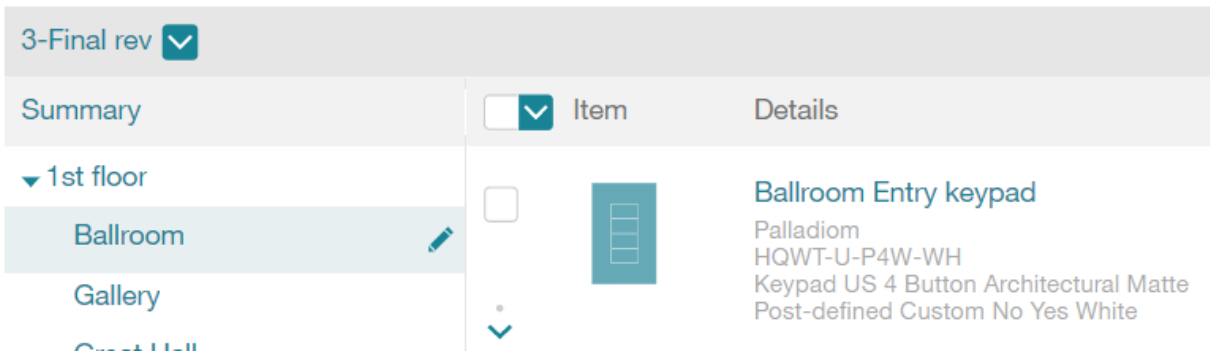
Lutron’s myProjects web tool is used to design and quote Lutron’s products (HomeWorks, RadioRA, shades, fixtures, etc.). This document highlights a process to help you save time, avoid mistakes, and eliminate data re-entry by importing your Lutron design into D-Tools’ System Integrator (SI) software.

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1.0 Exporting your design from Lutron myProjects

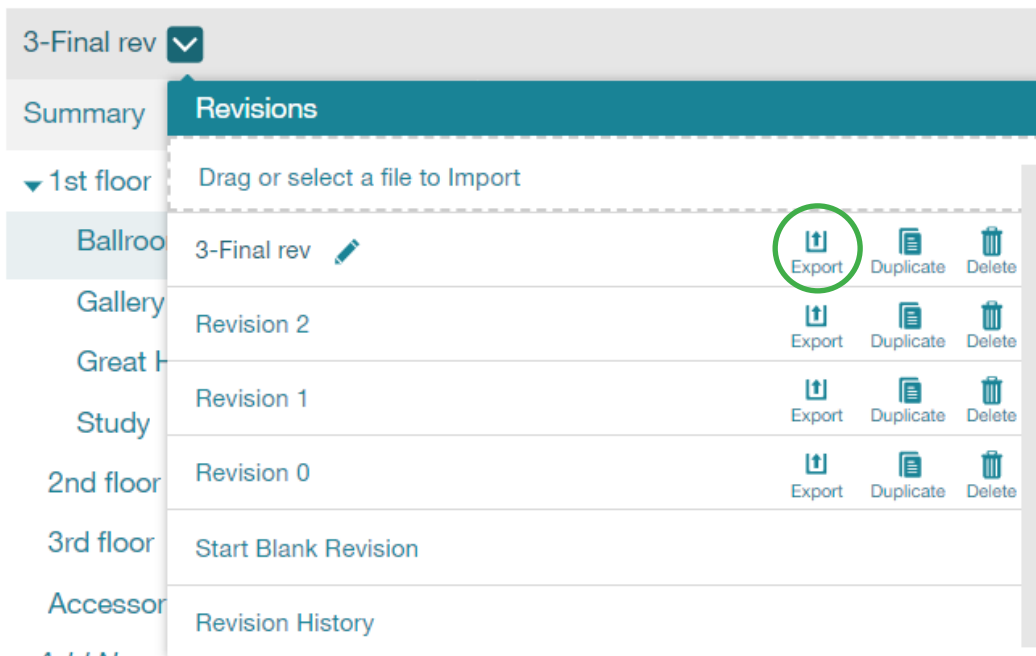
The first step is to complete the Lutron design in myProjects. As you complete your design, you will want to name your areas and devices to help you conveniently organize and refer to each product:



Note: Make sure each device has a unique name within the project.

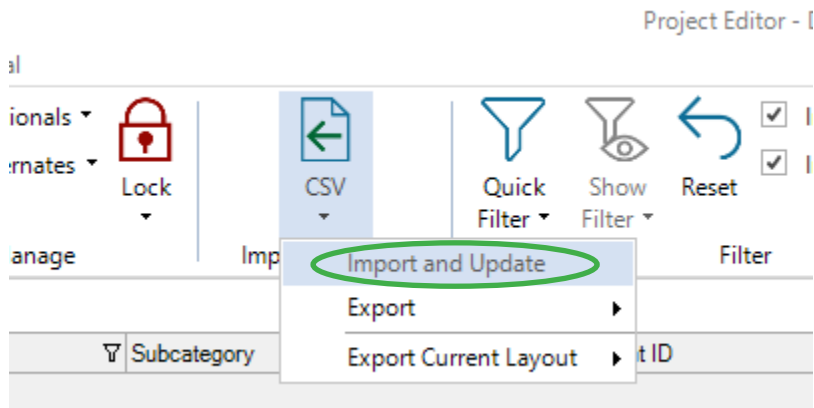
D-Tools will use this name as the unique identifier ("Component ID") to avoid duplicating line items when you import future changes.

Once the project is designed, click on the **Revisions** drop down menu and then click on **Export** to generate a CSV file:



2.0 Importing your design into the D-Tools SI Software

Create a new project or open an existing project in D-Tools SI and click the **Tools** tab. From within the **Tools** tab, go to **CSV** and click on **Import and Update**.



Choose to import the myProjects CSV file and the Map CSV file window will open.

Map the following myProjects fields to specific fields in SI:

1. “Area” column to “Location” field.
2. “Name” column to “Component ID” field. The Component ID is a unique identifier for items within an SI project and this mapping allows you to import an updated CSV file from myProjects if changes have been made without duplicating existing items.
3. “List Price” column to “MSRP” field.
4. Consider unmapping “System” column since it does not correspond to the “System” field in SI.

SI Map CSV file

Step 1 - Map CSV columns to appropriate database fields.

Hide exact CSV column matches

CSV Column	Bom Item Field Name	Map
Area	Location	Map
Name	Component ID	Map
Quantity	Quantity	Map
List Price	MSRP	Map
Product Type	Subcategory	Map
Product	Model	Map
Width1	<None>	Map
Width2	<None>	Map
Width3	<None>	Map
Width4	<None>	Map

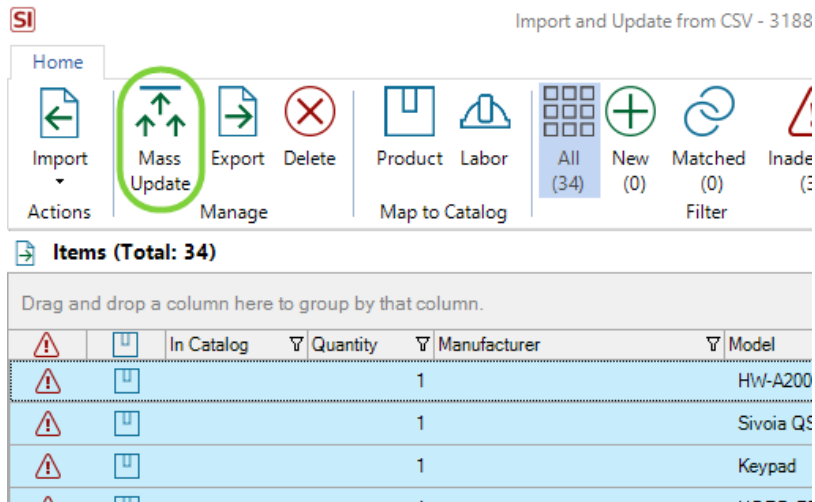
Preview: 3188425r2 wayne manor

Area	Name	Qua
Floor 1\Bedroom	Decorative Lamps 1	1
Floor 1\Bedroom	Roller Shade 1	1
Floor 1\Bedroom	Alisse 1	1
Floor 1\Bedroom	Maestro 1	1
Floor 1\Bedroom	Pico 1	1
Floor 1\Bedroom	seeTouch 1	1
Floor 1\Dining Room	Decorative Lamps 1	1

2.0 Importing your design into the D-Tools SI Software (continued)

Complete the remaining **Map CSV File** steps.

Select all line items and click **Mass Update**. Set Manufacturer as Lutron.



SI Import and Update from CSV - 3188

Home

Import Mass Update Export Delete Product Labor All (34) New (0) Matched (0) Inade (0)

Actions Manage Map to Catalog Filter

Items (Total: 34)

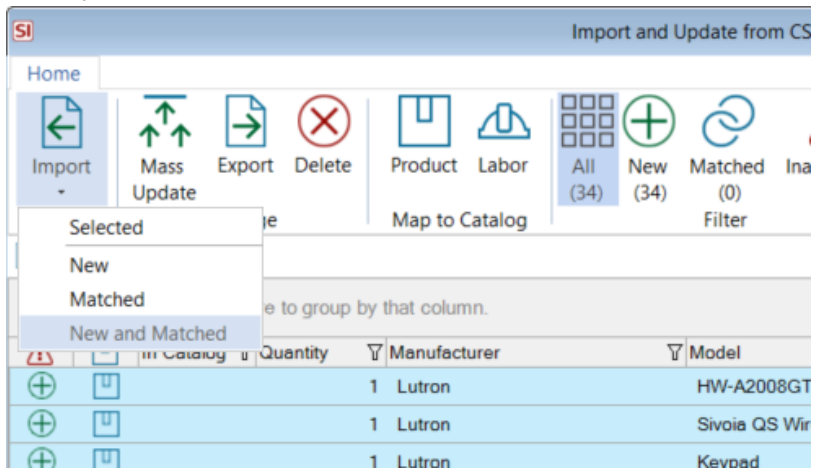
Drag and drop a column here to group by that column.

In Catalog	Quantity	Manufacturer	Model
	1		HW-A200
	1		Sivoia QS
	1		Keypad

Click on **Import** and select **New and Matched**.

Important notes:

1. If any of these products already exist in your SI Catalog, SI will automatically fill in any missing product information with data from the SI Catalog: e.g., Unit Cost, Description, Category, etc.
2. D-Tools SI will automatically handle Lutron's configured products (like shades or lighting) as generic/base model numbers to ensure that your catalog does not fill up with every variation of these custom products that you design or quote.



SI Import and Update from CS

Home

Import Mass Update Export Delete Product Labor All (34) New (34) Matched (0) Inade (0)

Selected
New
Matched
New and Matched

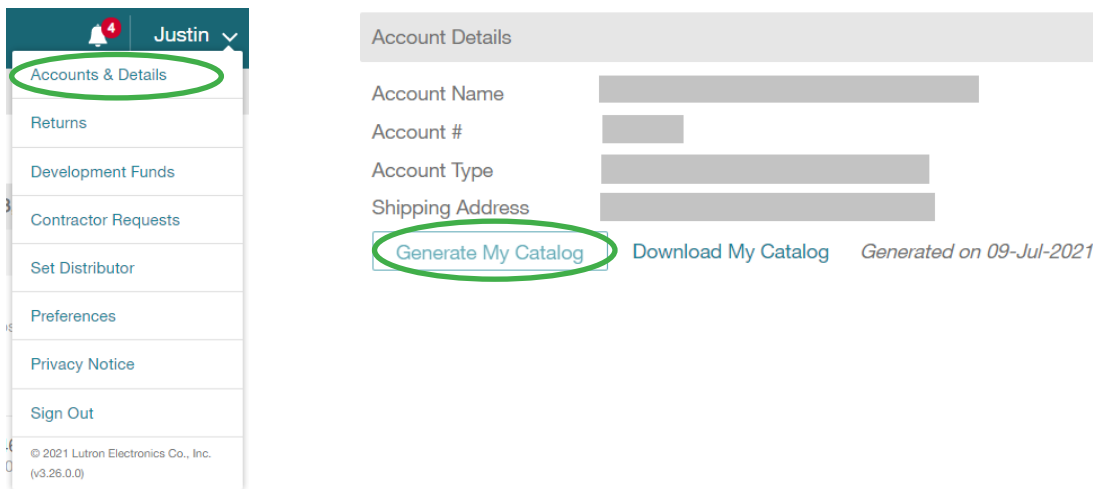
Map to Catalog Filter

Drag and drop a column here to group by that column.

In Catalog	Quantity	Manufacturer	Model
	1	Lutron	HW-A2008GT
	1	Lutron	Sivoia QS Wir
	1	Lutron	Keypad

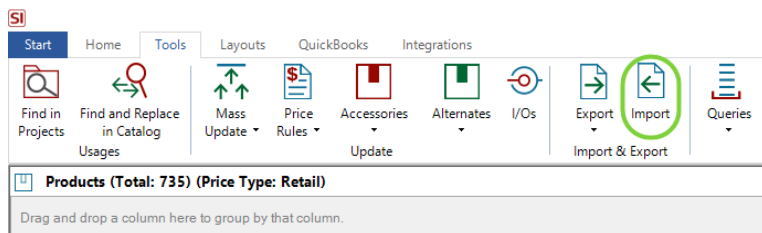
3.0 Keeping your SI catalog up-to-date with Lutron product data

Lutron makes it easy to download the most up-to-date product information, including our latest lead-times and your personalized pricing from Lutron. First, in your Account Details section of myProjects, simply generate and download your catalog:



D-Tools SI enables you to import this catalog. Please note that importing your catalog into D-Tools could take around 15-25 minutes depending on how many items are in your catalog.

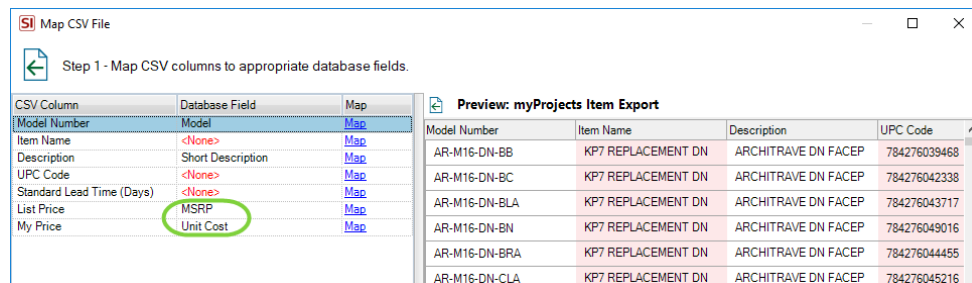
First, open the Product Explorer in SI and click the Tools tab and then click the Import button:



Choose to import the myProjects CSV file and the **Map CSV** file window will open.

Map the following myProjects fields to specific fields in SI:

1. "List Price" column to "MSRP" field.
2. "My Price" column to "Unit Cost" field.



Complete the remaining **Map CSV File** steps.

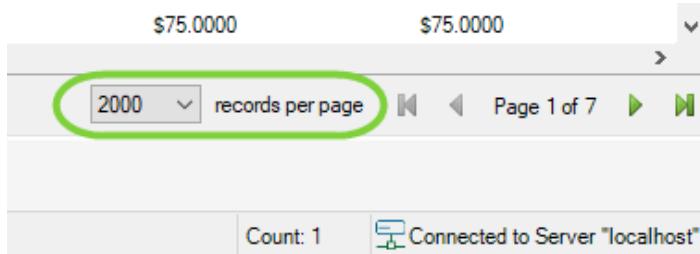
Select all line items and click **Mass Update**. Set Manufacturer as Lutron.

Click on **Import** and select **New and Matched** then click **OK** on the form that opens.

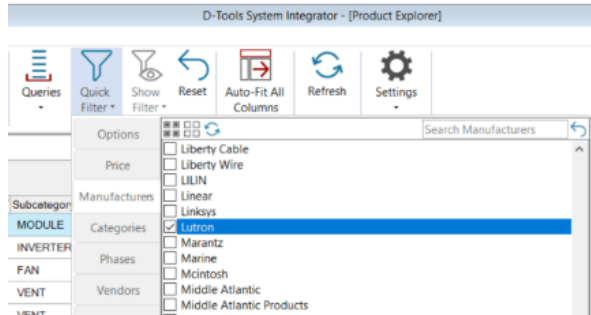
Close the Import Editor when complete.

3.0 Keeping your SI catalog up-to-date with Lutron product data (continued)

Change your “records per page” setting to 2000 (you can only update up to 2000 items at one time).

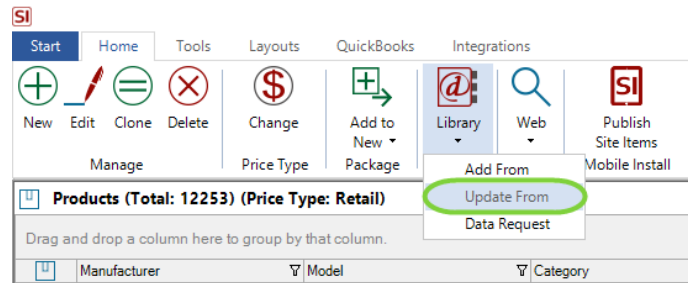


Use the Quick Filter to filter to Manufacturer = Lutron.



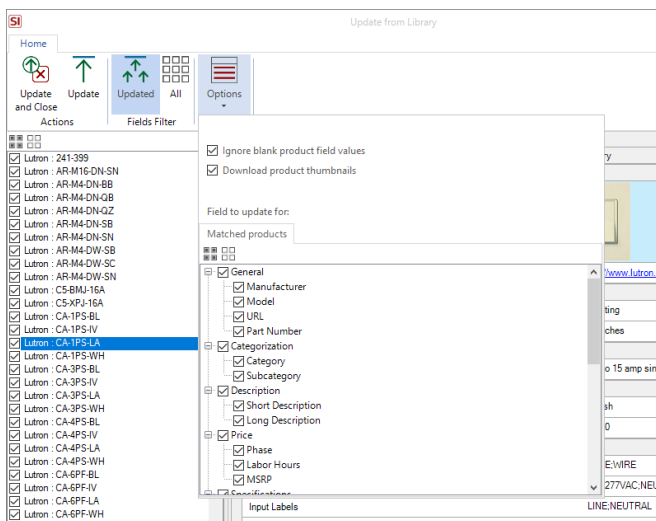
Select all of the Lutron Products and click the Home tab.

Click Library and select Update From



Click OK on the message informing you of how many of the items were found in the D-Tools Library.

You can choose which fields you want to update via the Options button if desired. When done click Update and Close.



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