How To Configure Triathlon Select Shades in myProjects

INDEX

Getting Started With myLutron

myProjects

Convert Project into a Quote

Getting Started with myLutron

1. Create a Lutron PRO Account (Lutron PRO Application)
   a. Visit the website for addition resources (Lutron PRO website)

2. Create a myLutron Account
   a. Go to myLutron.com
   b. Sign in, or
   c. Create a new account and follow the on-screen instructions
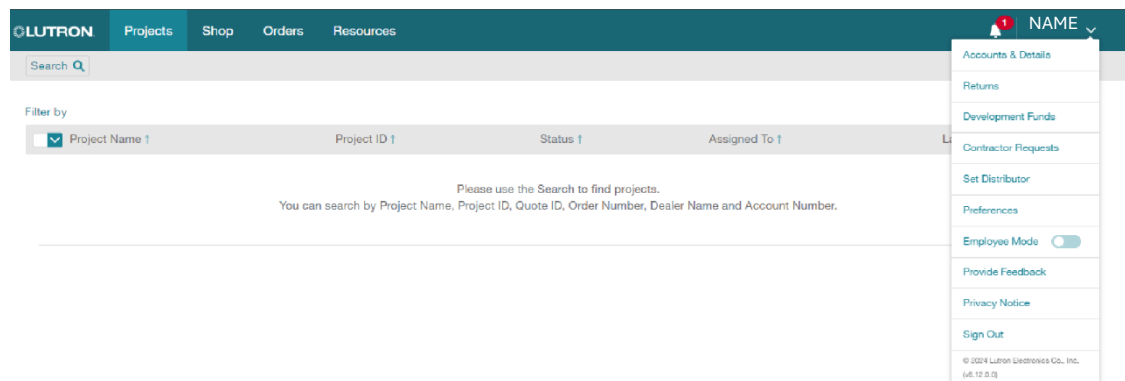
3. Add Your PRO Account Number
   a. Click your name in the top right corner
   b. Click myProfile
   c. Enter your PRO number under "Lutron Account Number"
   d. Click Save
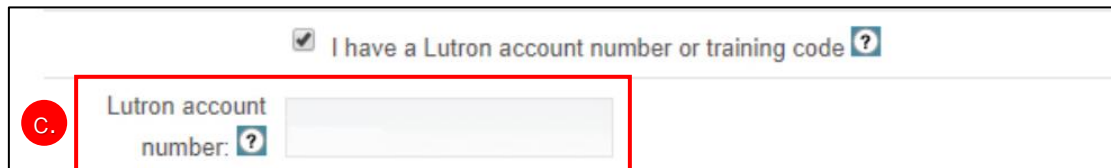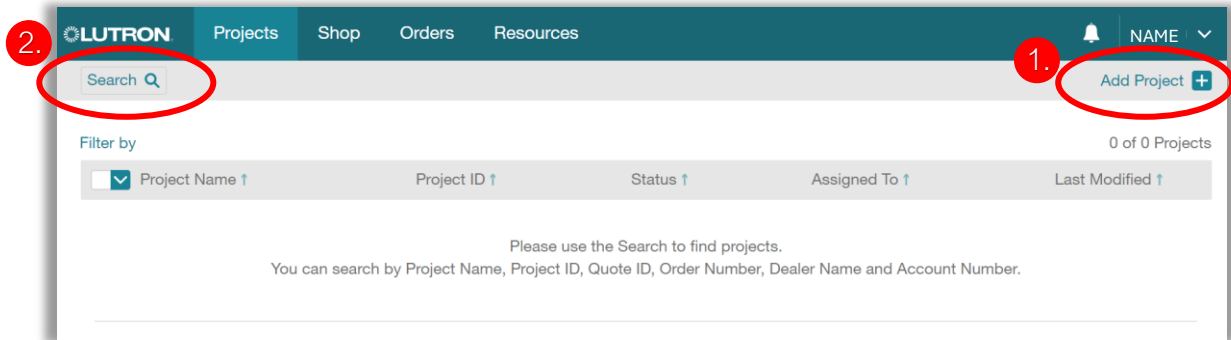

4. Set Your Distributor
   a. Click your name in the top right corner
   b. Select "Set Distributor" to add your preferred distributor you work with

Creating a New Project

1. Once logged in, on the "Projects" Tab, click "Add Project" to start a new project
2. For existing projects, click the "Search" bar and enter a project name or quote ID

3. Enter the information for your new project

4. Every project is given a Quote ID number
    a. You can search existing projects with this number

5. Add revisions to duplicate the entire quote and make changes without altering the previous revision(s)
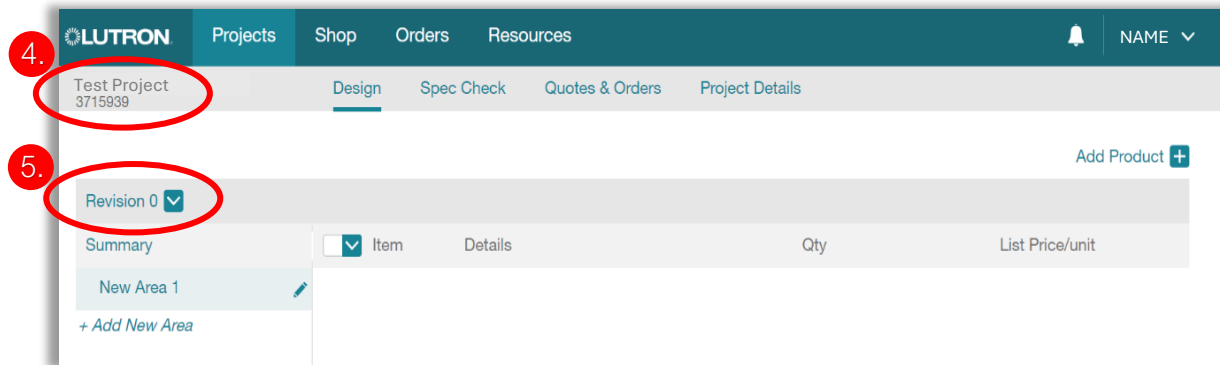

6. Click "Add New Area" to design floors or individual rooms
    a. Typically, only one area is needed for a smaller shade projects
    b. If you need to quote individual areas at a time, it is also recommended to build the project into multiple areas
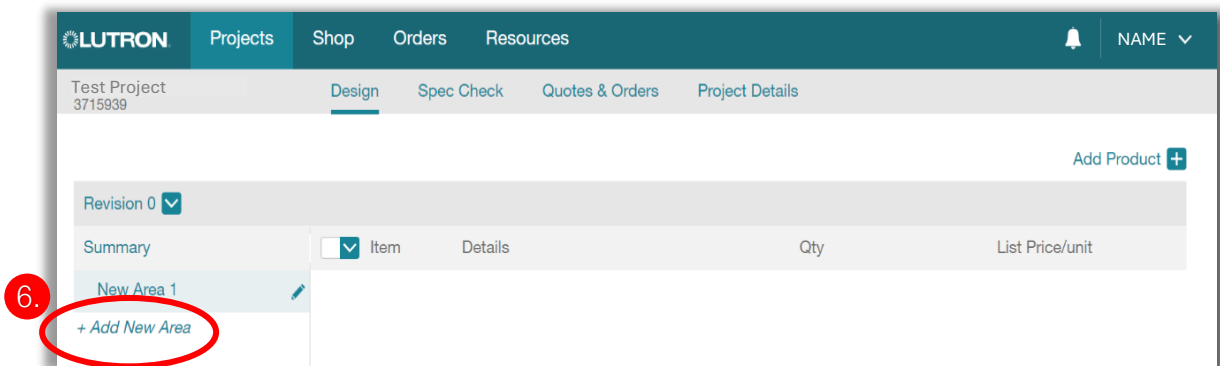
7. To add a Triathlon Select shade, click "Add Product"
   a. A pop-up menu will appear
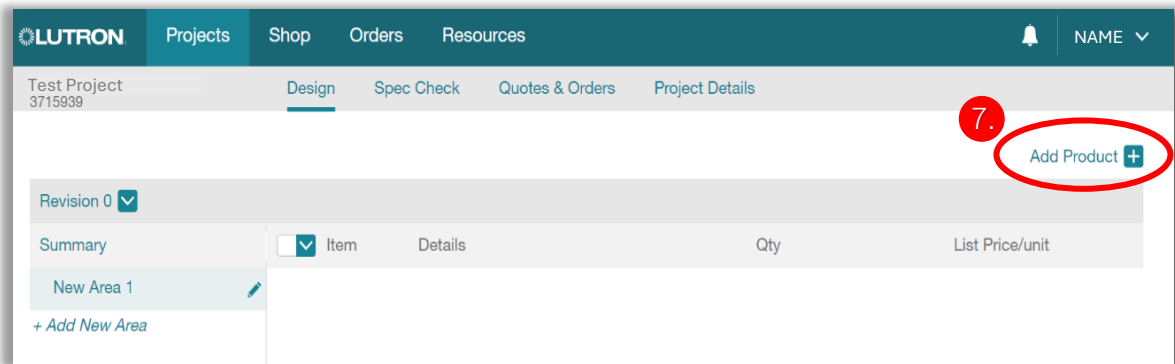
8. Triathlon Select is under "Shades" and then "Select Roller" a
   a. Note: You may not see all the options shown below.
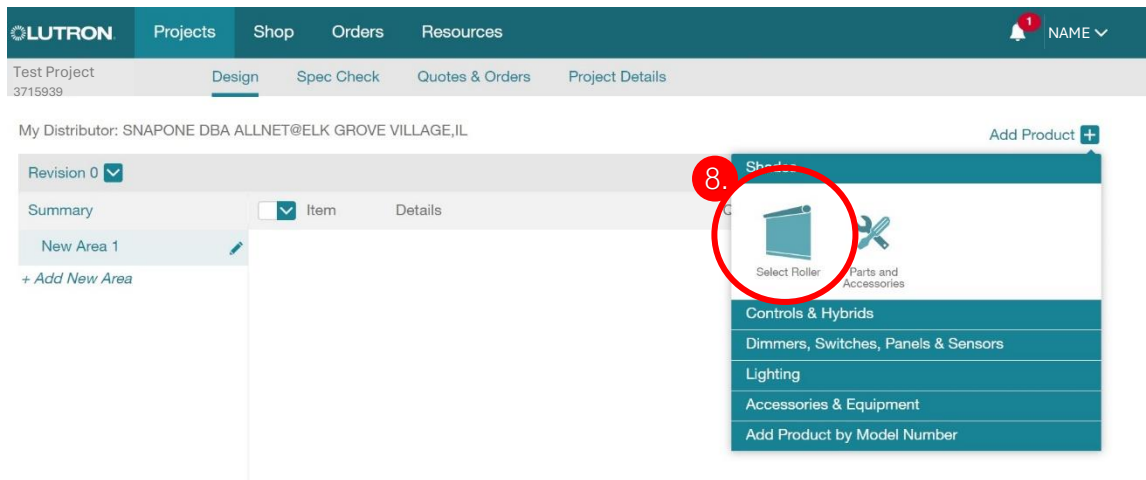
9. Configure Menu
    a. Name your shade for easy identification.
    b. Enter the size of the shade
    c. Select inside or outside mount and if spacers are needed
    d. Select fabric ("Haven" will show the 4 fabric selections)
    e. Important additional information will appear below
    f. List pricing is in the top right
    g. Save configuration – automatically return to "Projects tab"

10. Repeat steps 6 through 10 if the shade is in another area or needs to be different
    a. If the next shade is similar and in the same area/room move on to step 12

11. Click the "Duplicate" button if you have additional similar shades
   a. Once you click "Duplicate", you'll be brought back to the Configuration Menu with pre-filled fields (step 9)
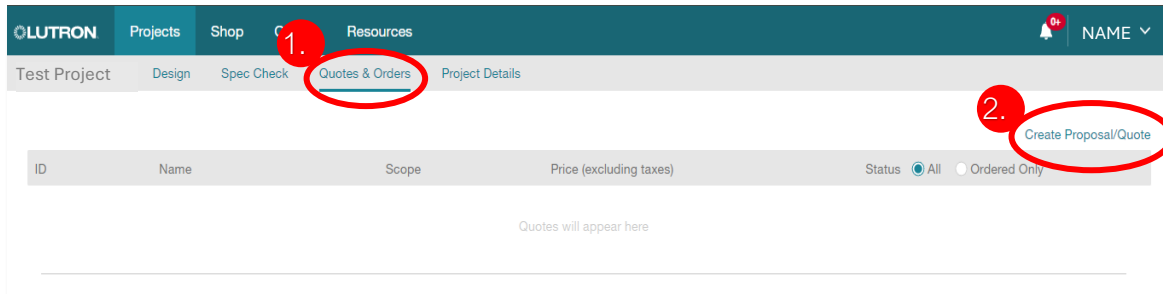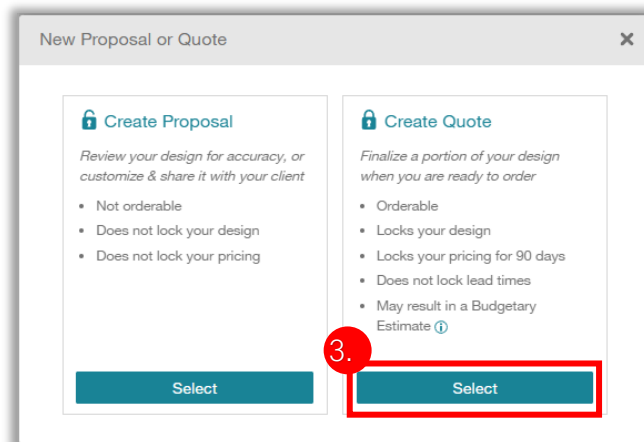   b. Give the shade a specific name and make any adjustments if needed
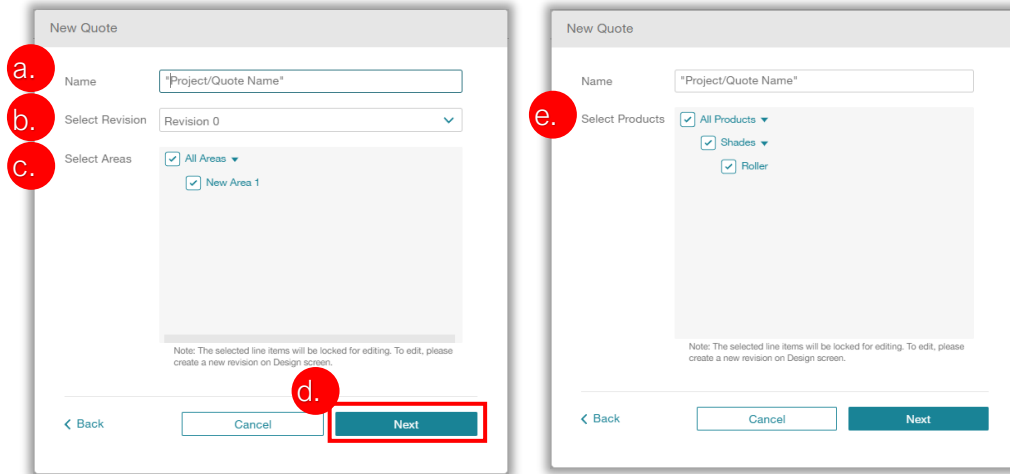
Convert Project into a Quote

1. Go to "Quote and Orders" tab to create a list price quote
2. Click "Create Proposal/Quote"


3. Click "Select Under Create Quote"

4. Select what you want quoted
   a. Name the Quote
   b. Select a Revision
   c. Select an Area(s)
   d. Click Next
   e. Select Shade(s)

5. Click "Request Pricing" to send to your Distributor
   a. A notification email will be sent from myProjects to the Distributor
   b. The Distributor will adjust the quote to your pricing in their own system
   c. When finished, they will send the quote back to you with your reflected pricing through their normal preferred contact method(s)
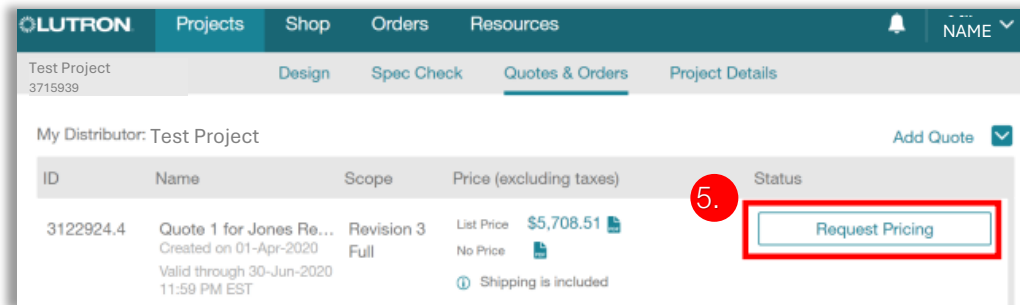
6. Review your adjust quote
   a. If ready to order:
      • Submit a purchase order as you normally would, to the Distributor with the Quote ID number as the PO
      • PO's are not submitted through myProjects
      • Keep in mind, all items quoted will be ordered

   b. If not ready:
      • Create a new project revision (add/edit shades/rooms), or
      • Create a new quote (select different shades/rooms)