

# **How To Configure Triathlon Select Shades in myProjects**

## **INDEX**

### **Getting Started With myLutron**

1. [Create a Lutron PRO Account \(Lutron PRO Application\)](#)
2. [Create a myLutron Account](#)
3. [Add Your PRO Account Number](#)
4. [Set Your Distributor](#)

### **myProjects**

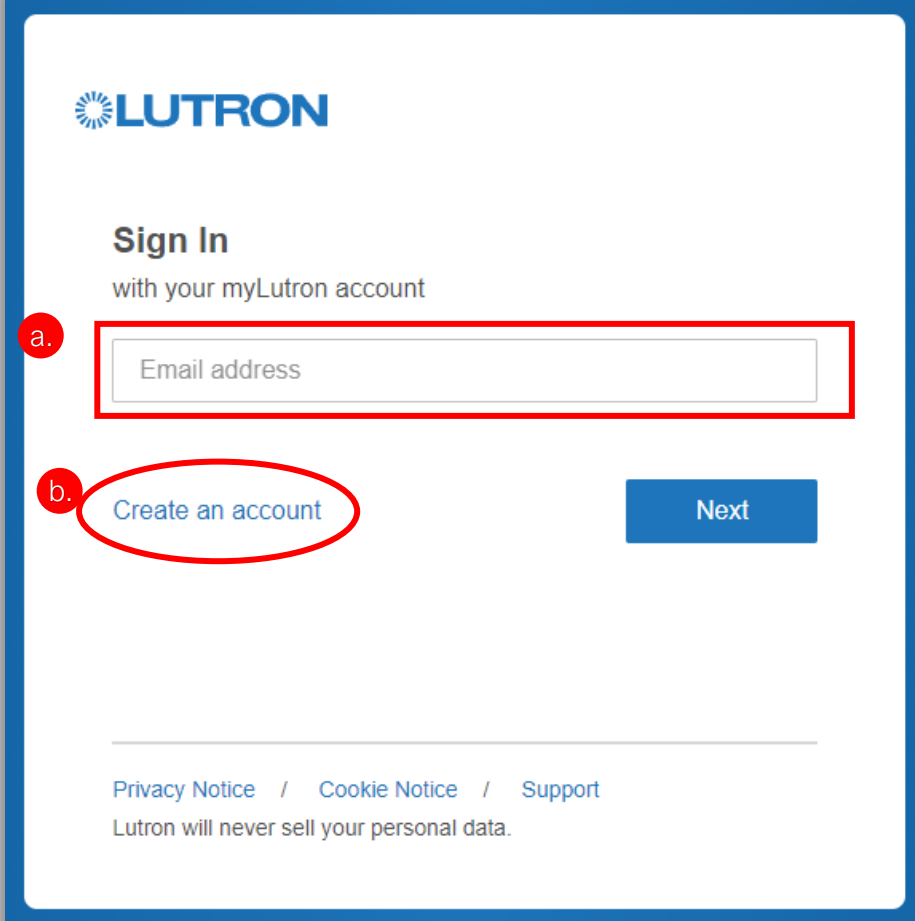
1. [Create New Project](#)
2. [Find an Existing Project](#)
3. [Enter Project Information](#)
4. [Quote ID](#)
5. [Add Revisions](#)
6. [Add New Areas](#)
7. [Add Product](#)
8. [Add Triathlon Select Roller Shades](#)
9. [Shade Configuration](#)
10. [Add New Shade](#)
11. [Duplicate Shade](#)

### **Convert Project into a Quote**

1. [Quotes & Orders Tab](#)
2. [Create Proposal/Quote](#)
3. [Selecting Proposal or Quote](#)
4. [Select Specifics To Include For a Quote](#)
5. [How to Request Pricing](#)
6. [Review the Quote / Ordering Process](#)

## Getting Started with myLutron

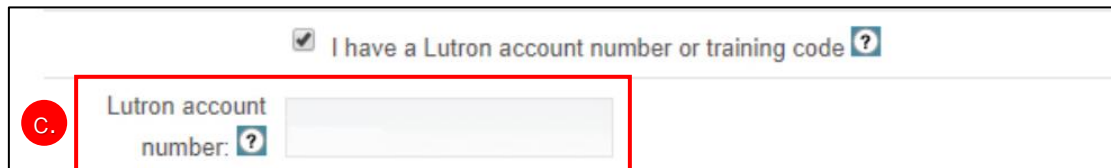
1. Create a Lutron PRO Account ([Lutron PRO Application](#))
  - a. Visit the website for addition resources ([Lutron PRO website](#))
  
2. Create a myLutron Account
  - a. Go to [myLutron.com](#)
  - b. Sign in, or
  - c. Create a new account and follow the on-screen instructions



The screenshot shows the Lutron Sign In page. At the top left is the Lutron logo. Below it is the heading "Sign In" and the subtext "with your myLutron account". There is a text input field labeled "Email address" which is highlighted with a red rectangle and a red circle containing the letter "a.". Below the input field are two buttons: "Create an account" (highlighted with a red circle and a red circle containing the letter "b.") and "Next". At the bottom of the page, there are links for "Privacy Notice", "Cookie Notice", and "Support", followed by the text "Lutron will never sell your personal data."

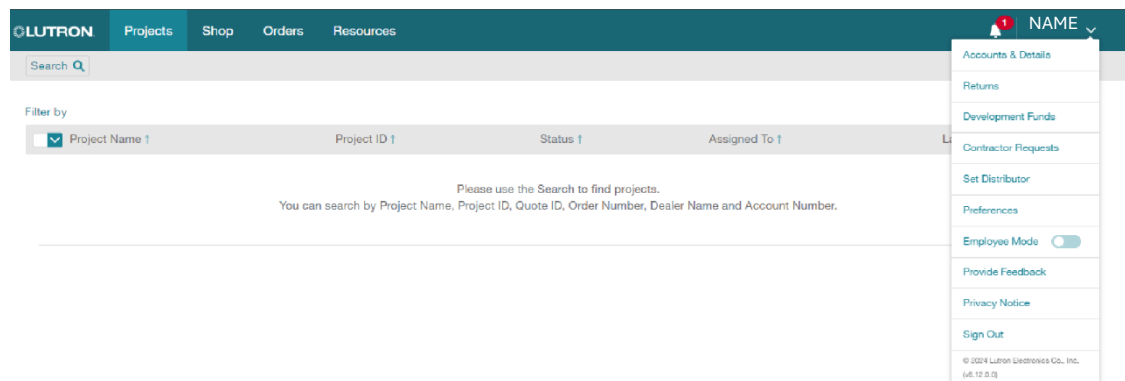
### 3. Add Your PRO Account Number

- a. Click your name in the top right corner
- b. Click myProfile
- c. Enter your PRO number under “Lutron Account Number”
- d. Click Save



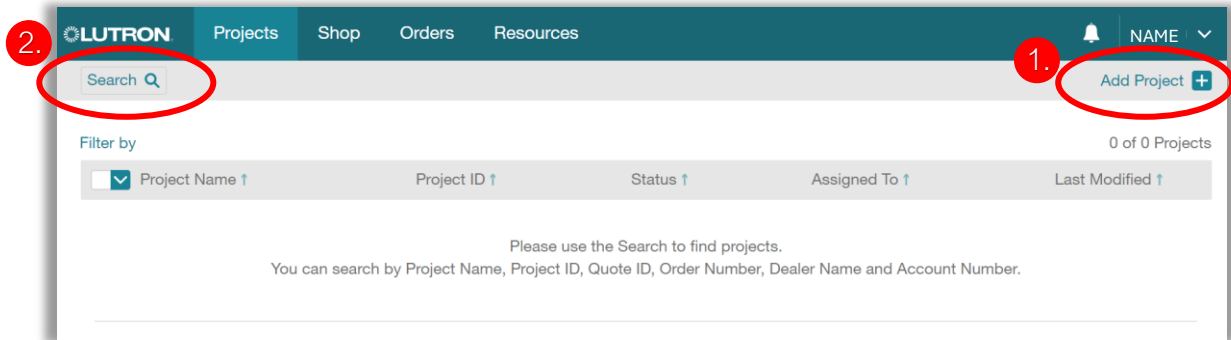
### 4. Set Your Distributor

- 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

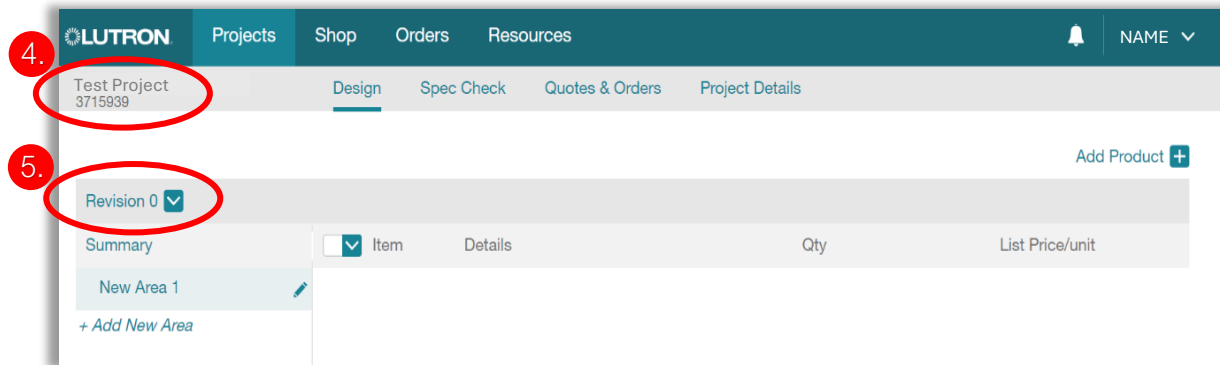
1. Once logged in, on the “Projects” Tab, click “Add Project” to start a new project
2. For existing projects, click the “Search” bar and enter a project name or quote ID



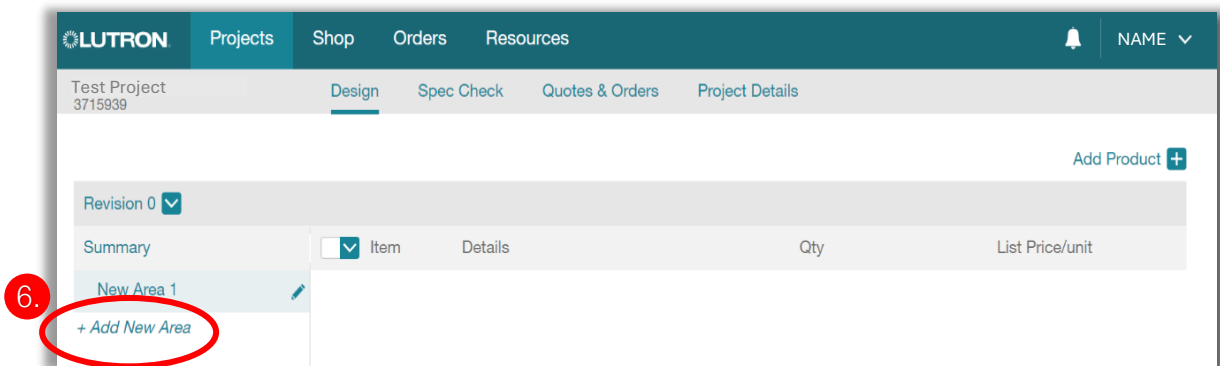
3. Enter the information for your new project

The screenshot shows the 'New Project' form. The form is titled 'New Project' and contains several fields for entering project information. A red box highlights the left side of the form, and a red circle with the number '3' is around the left side of the form. The fields are: 'Project Name' (with sub-fields for 'Name of Entity' and 'Name of Space'), 'Status' (dropdown menu with 'Design' selected), 'Description' (text input field with 'Optional' entered), 'Location' (dropdown menu with 'United States' selected), 'Address' (text input field), 'City' (text input field), 'AL' (dropdown menu), and 'Zip Code' (text input field), 'Account' (text input field with 'Account Name or ID' entered), 'Assigned to' (dropdown menu with 'Select' selected), 'Job Type' (dropdown menu with 'Select' selected), 'Primary Lutron Influencer' (text input field with 'Company' entered), and 'Estimated Close Date' (calendar icon).

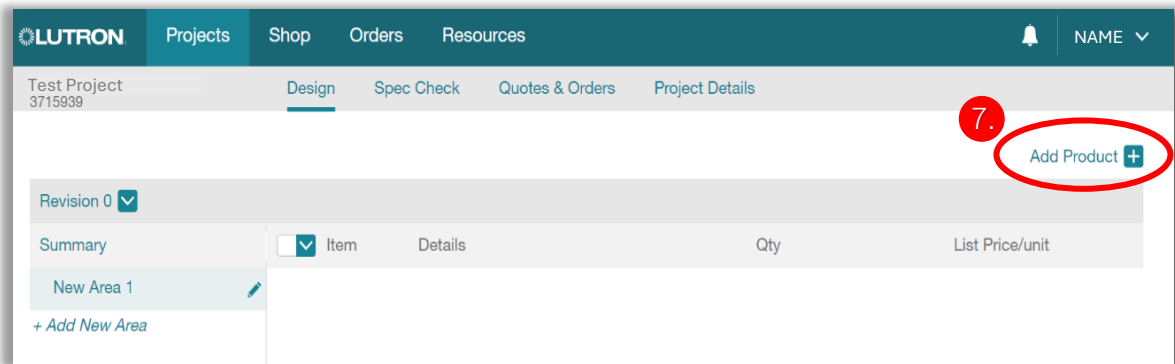
4. Every project is given a Quote ID number
  - a. You can search existing projects with this number
5. Add revisions to duplicate the entire quote and make changes without altering the previous revision(s)



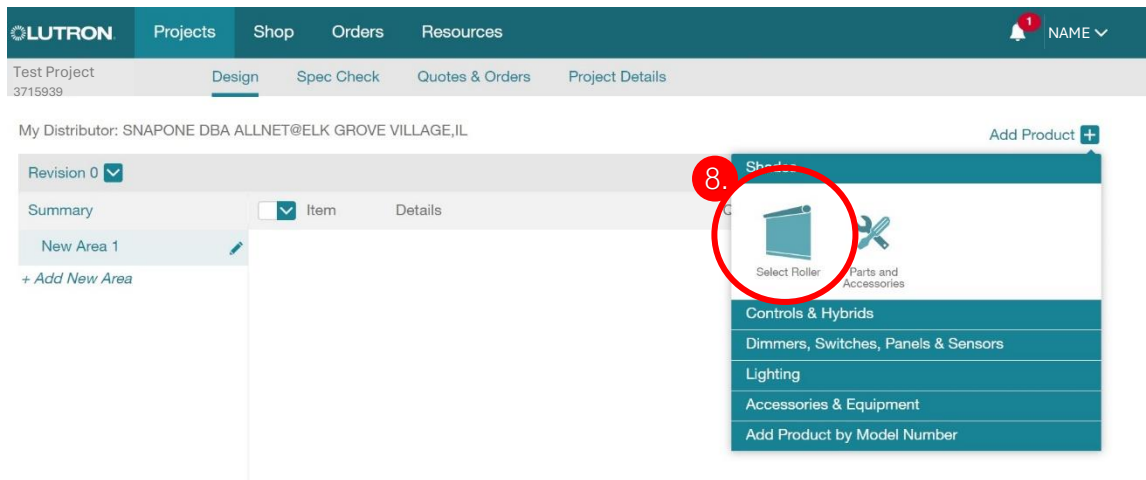
6. Click “Add New Area” to design floors or individual rooms
  - a. Typically, only one area is needed for a smaller shade projects
  - b. If you need to quote individual areas at a time, it is also recommended to build the project into multiple areas



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”

The screenshot shows the 'Select Roller' configuration window for 'New Area 1'. The interface includes the following elements:




- a.** Title bar: 'Select Roller' and 'New Area 1'.
- b.** Product selection: 'Select Roller 1' dropdown and 'Qty: 1'.
- f.** Shipping and pricing: 'Ships in 5 business days' and 'List Price/unit \$599.00'.
- Size:** Width: 48 in, Height: 72 in.
- c.** Mounting: 'Inside' and 'Outside' options with corresponding diagrams.
- d.** Mounting Space: 'No' dropdown.
- Fabric:** 'Haven <1%>' dropdown showing 'Light Grey' with model and sample information. Includes a 'Launch Fabric Finder' button.
- Bracket Color:** 'Lutron Recommended' dropdown.
- Technology:** 'Sivoia QS Triathlon' dropdown.
- e.** Additional information section:
  - Bracket Type: B
  - Bracket Color: White
  - Battery Code: 4D
  - Battery Life: 2 Years
  - Battery Life Range: 1.5 - 3.0 years
- Convert to Custom:** Button.
- g.** Action buttons: 'Cancel' and 'Save'.

## 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

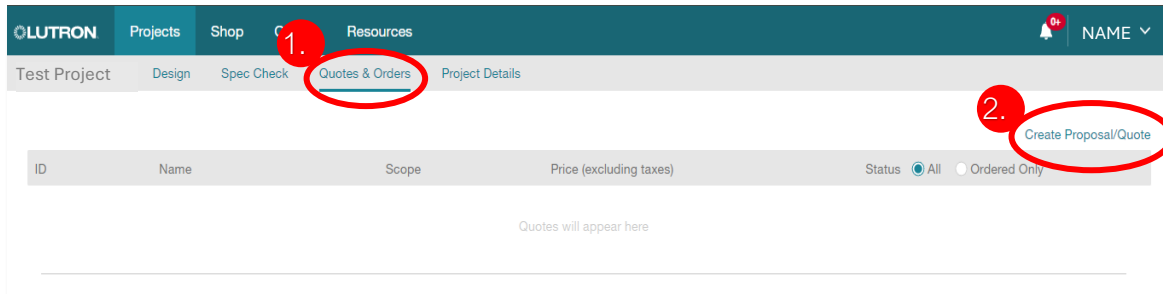
The screenshot shows a product configuration interface. At the top right, there are links for "Multi Edit" and "Add Product" with a plus sign. Below this is a summary bar with "Revision 0" (checked), "Hidden" (with a lock icon), "Ships in 5 business days", and "Area Price \$599.00".

Summary	<input type="checkbox"/> Item	Details	Qty	List Price/unit	
New Area 1 <a href="#">+ Add New Area</a>	<input type="checkbox"/>	 <b>Select Roller 1</b> Select Roller, Sivoia QS Triathlon, Lutron Recommended 48 in, 72 in, Outside Haven <1% Light Grey (RF-HVN-LG)	<input type="text" value="1"/>	\$599.00 Ships in 5 business days	 Delete <b>12.</b>  Duplicate

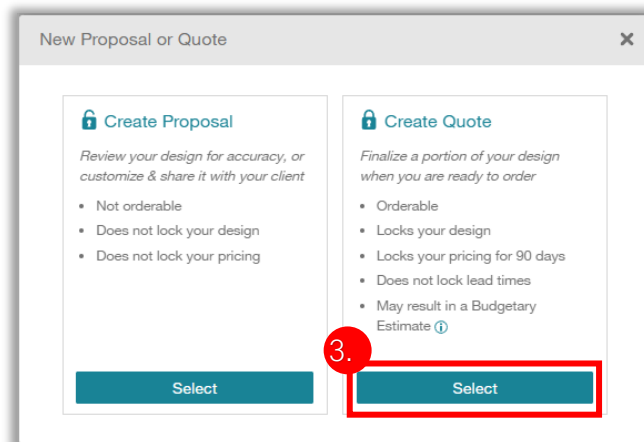


## Convert Project into a Quote

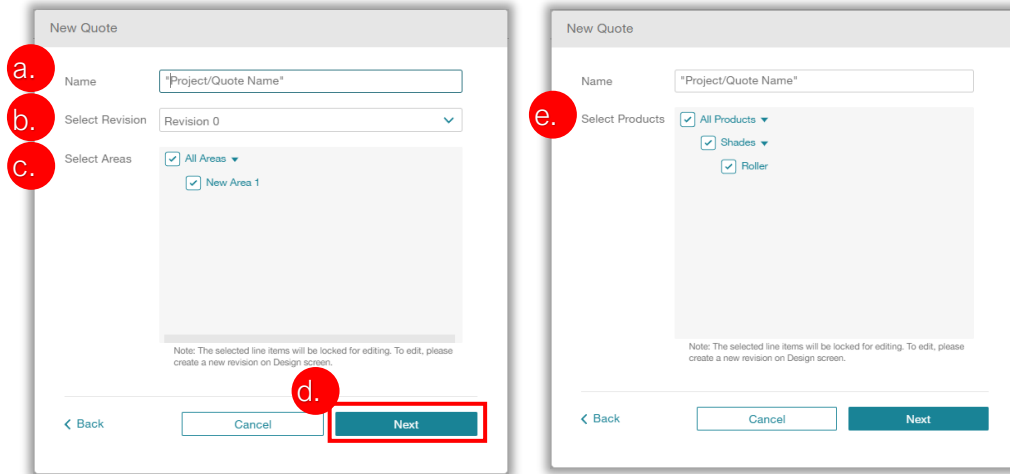
1. Go to “Quote and Orders” tab to create a list price quote
2. Click “Create Proposal/Quote”



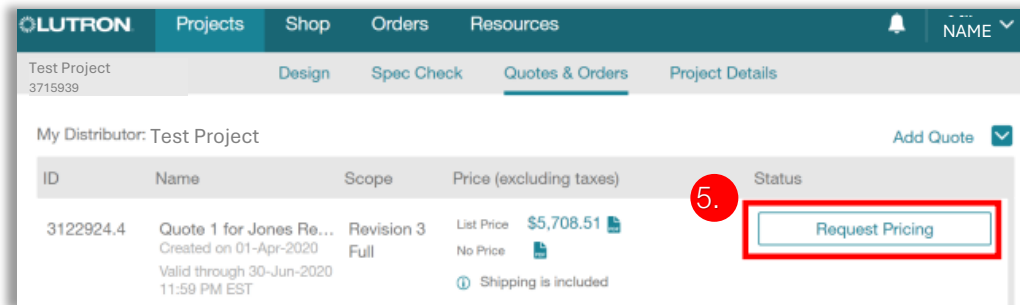
3. Click “Select Under Create Quote”



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)