

New Manual Transaction Request Process (Request submission)

1. The link below will take you to the Customer Financial Assistant. From there, you will select the option for *Billing*, then select *Credit Memo or Manual Bill Request*. Download the Excel form before you begin to enter information.

[Customer Financial Assistant](#)

2. Make sure you complete all required fields on the form marked with a red x. The icon turns green after data is entered.

Transaction Request Details		
Contact Name	(Enter your first and last name)	✘
Contact Phone	(Enter your phone number)	✘
Contact Email	(Enter your email address)	✘
Request Type	Select a credit or invoice type	✘
Product Type	Select a product (business) type	✘
Request Currency	Select a transaction currency	✘
Reason Code	Select a reason	✘

3. Comments and details regarding the reason for the request should only be entered in the comments section on the form. Comments entered in the body of the email sent to Finance-ManualTransactionsService@AcuityBrands.com **will not** be visible to the approver.

Request Submission Comments
Add any comments to justify the request and assist with processing. This is required for ABL Invoice and OSRAM Invoice (manual bill) requests. An Acuity representative will reach out if additional supporting documentation is required.
(Enter comments about this request here)
! All comments related to this request submission should be added here and NOT in the email body. !

4. At the time of email submission, you can attach other supporting documentation along with the request form. This includes email approvals per DOA.
5. Upon submission of your request, you will receive an email notification with a summary of your request from Finance-ManualTransactions-Service@AcuityBrands.com. Note the Request Reference # that will follow the request through processing.

Your ABL Invoice Manual Transaction Request was successfully submitted



Finance-ManualTransaction-Service
To White, LaQuita

Reply Reply All Forward

Tue 09/21/2021 7:44 AM

[THIS IS A TEST EMAIL PLEASE DISREGARD IF YOU ARE NOT THE INTENDED RECIPIENT]

Your ABL Invoice Manual Transaction Request regarding 456 was successfully submitted and is now pending approval.

You'll receive periodic updates as your request moves through the system. If needed, an Acuity representative will reach out to you for additional information regarding your request. If you have any concerns with this request, please reach out to your Acuity representative and provide the "Request Reference #" below.

Submission Details

Request Reference #: 48
Request Type: ABL Invoice
Request Reason: All ABL Invoices
Request Currency: USD
Agent/SalesPerson #: 456
Customer Account/Seller Reference #: 231456
Request Order #: 456-1234
Request PO #: MBTest
Total Distributor Credit: \$150.00
Submission Comments: Customer keeping additional material

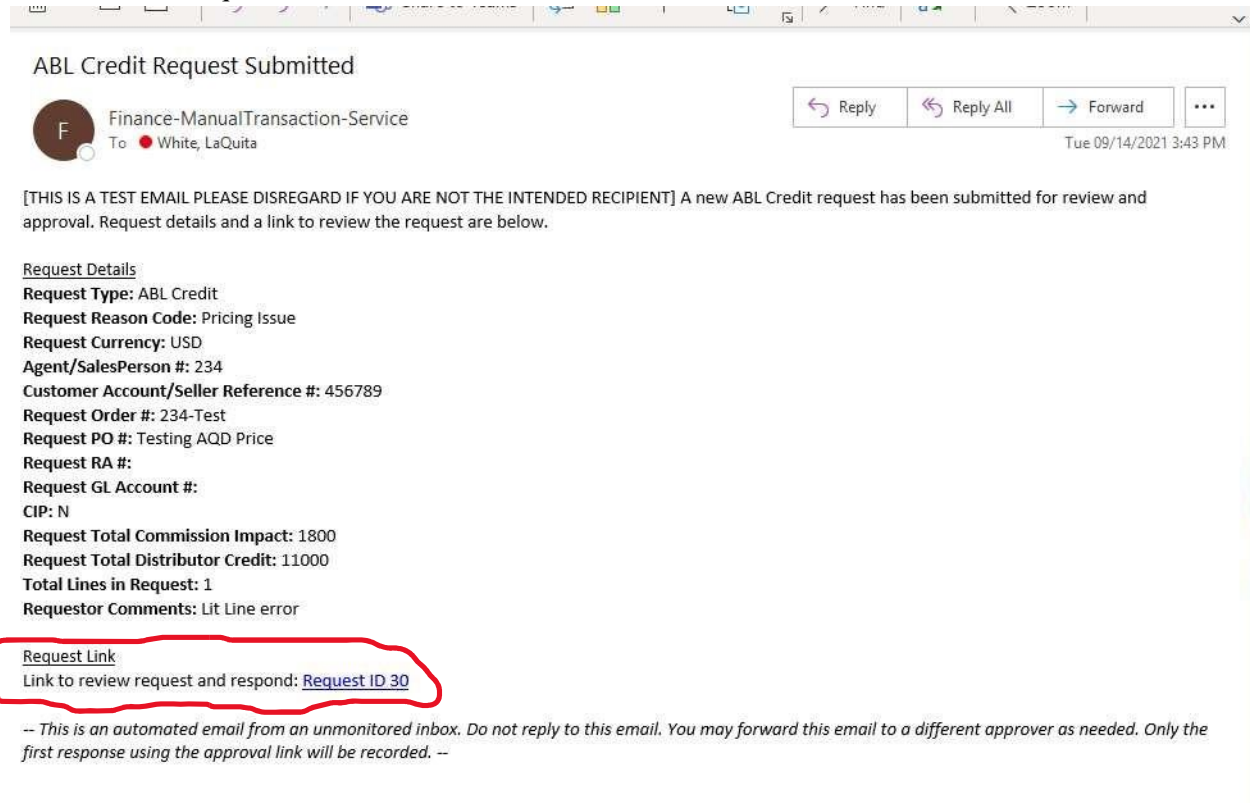
-- IMPORTANT: This email was sent from an account we only use to send notification messages. Do not reply to this email as it will not be received. Please contact your Acuity representative if you have questions. --

6. As the request is approved and processed, you will receive email notifications from Finance-ManualTransactions-Service@AcuityBrands.com with updates. Also, if the request is rejected for any reason, you will receive an email notification with details describing the reason for the rejection.

If you have any questions or suggestions regarding this new process, please reach out to Billing@AcuityBrands.com.

New Manual Transaction Request Process (Approval Process)

1. You will receive an email with a summary of the manual transaction request. At the bottom of the email, there is a link with the Request Id #. This link will open the Power App tool with the full details of the manual transaction request.



ABL Credit Request Submitted

Finance-ManualTransaction-Service
To: White, LaQuita

Reply Reply All Forward

Tue 09/14/2021 3:43 PM

[THIS IS A TEST EMAIL PLEASE DISREGARD IF YOU ARE NOT THE INTENDED RECIPIENT] A new ABL Credit request has been submitted for review and approval. Request details and a link to review the request are below.

Request Details
Request Type: ABL Credit
Request Reason Code: Pricing Issue
Request Currency: USD
Agent/SalesPerson #: 234
Customer Account/Seller Reference #: 456789
Request Order #: 234-Test
Request PO #: Testing AQD Price
Request RA #:
Request GL Account #:
CIP: N
Request Total Commission Impact: 1800
Request Total Distributor Credit: 11000
Total Lines in Request: 1
Requestor Comments: Lit Line error

Request Link
Link to review request and respond: [Request ID 30](#)

-- This is an automated email from an unmonitored inbox. Do not reply to this email. You may forward this email to a different approver as needed. Only the first response using the approval link will be recorded. --

2. Once in the Power App, you can review the full details of the request. The fields in white can be altered, fields in gray are fixed. The Lines tab provides a breakdown of the request. The Attachments tab will contain any documents the requester submitted. You also have the option to add documents under the Attachments tab. The Approvals tab shows who approved the request with date and time. The Change History tab provides a timeline of the transaction request from entry.

Power Apps | Manual Transaction Requests

Request #55 Details PENDING BILLING APPROVAL

← Back to Request List Save Changes

Overview	Lines	Attachments	Approvals	Change History
Agent / SalesPerson # 245		Request Reason Code ABL - CC - LIT Line Changes		Request Currency USD
Customer / Seller # 245686		Product (Business) Type Core - C&I / Digital /Corporate Acc		Total Distributor Credit 200.00
Order # 245-10		Return Authorization (RA) #		Total Commission Impact 100.00
PO # Testing PO		General Ledger (GL) #		Total Lines in Request 1
Submission Comments Charged too much!				
AQD Use Only				
CIP N		CIP Distributor Amount 0.00		CIP Commission Deduction 0.00
Split Agency 1 % 80	Split Agency 1 # 112	Split Agency 2 % 20		Split Agency 2 # 258
Transaction Information				
Special Instructions		Tax Exempt N		
Approval Required by Billing Representative			Approve	Reject
			Re-Route	

- By clicking Approve, you agree with the details entered on the request and the transaction will be processed by Billing. A comment box will populate when you select Approve; any comments added in this box are emailed to the requester with confirmation the request was approved.

Approval Verification

By submitting this approval, you agree that you authority to do so and have verified all information relating to this request, including line RNC values and the GL string (if applicable).

Add comments about the approval here (optional).

Cancel
Submit

- If you Reject the request, a comment box will populate for you to enter comments explaining the reason for the rejection.

Rejection Reasoning

Please explain why this request is being rejected. This explanation WILL be sent to the requestor and additional contacts listed on the request with the rejection notification!

Explain rejection reasoning to be sent to the requestor in detail here.

Cancel
Submit

- If the request should be reviewed by someone other than yourself, click the Re-Route button. You have the option to choose forward to the list of groups populated in the drop down or you can enter the email of the Acuity personnel. The request will then forward to that person or group in the form of an email with a link to view the request in Power App.

Re-Route Request

If a different business unit approval is required, you may re-route the approval by selecting a person or group mailbox below and an email with the request approval details and link will be sent to the recipient. If the person who should approve is within your business unit, you may simply forward the request email and they should be able to approve as long as they have access.

Note: Re-routing a request does not invalidate previous approval links (they will still work). **If the request is routed after a business unit representative has already approved the request, re-routing will clear the business unit approval fields and update when a representative responds.**

Select a group to route to:

Or search for a person:

Cancel

Re-Route

6. Based on your selection the request is either submitted for processing, forwarded to another Acuity personnel for approval, or returned to the requester stating it was rejected.

If you have any questions or suggestions regarding this new process, please reach out to Billing@AcuityBrands.com.