Warranty Services Enhancements
June 2016

Agenda

- ❑ **Two Way Communication Tool**
- ❑ Contractor Payment Center
- ❑ Resources for More Information

Acuity Warranty Services

Introduces the

Two-Way Communication in RFC Tool

Go-Live: June 6, 2016

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AGILE Request for Claims (RFC) & FCW

Introducing …..Implementation of two-way communication through the Acuity Tools between….

How will this new enhancement improve our process?

- Elimination of emails (except where warranted)
- Streamline work flow
- Concise visibility of claim activity in one place
- Improves response times

How will this process work?

Agent ->

Agent sends message or attaches documents to Post Sales via the RFC

RESPONSE:
Agent is notified in RFC with Action Required or Note Message + Email also Rec'd from our Notifications Box

Out

DoNotReply Warranty Notifications Box

Post Sales ->

Post sales receives the Agent message or docs on their dashboard (FCW)

Post sales reviews message on their system

Post Sales checks action as complete; and responds to Agent with: Action Required or - Note to Agent Message

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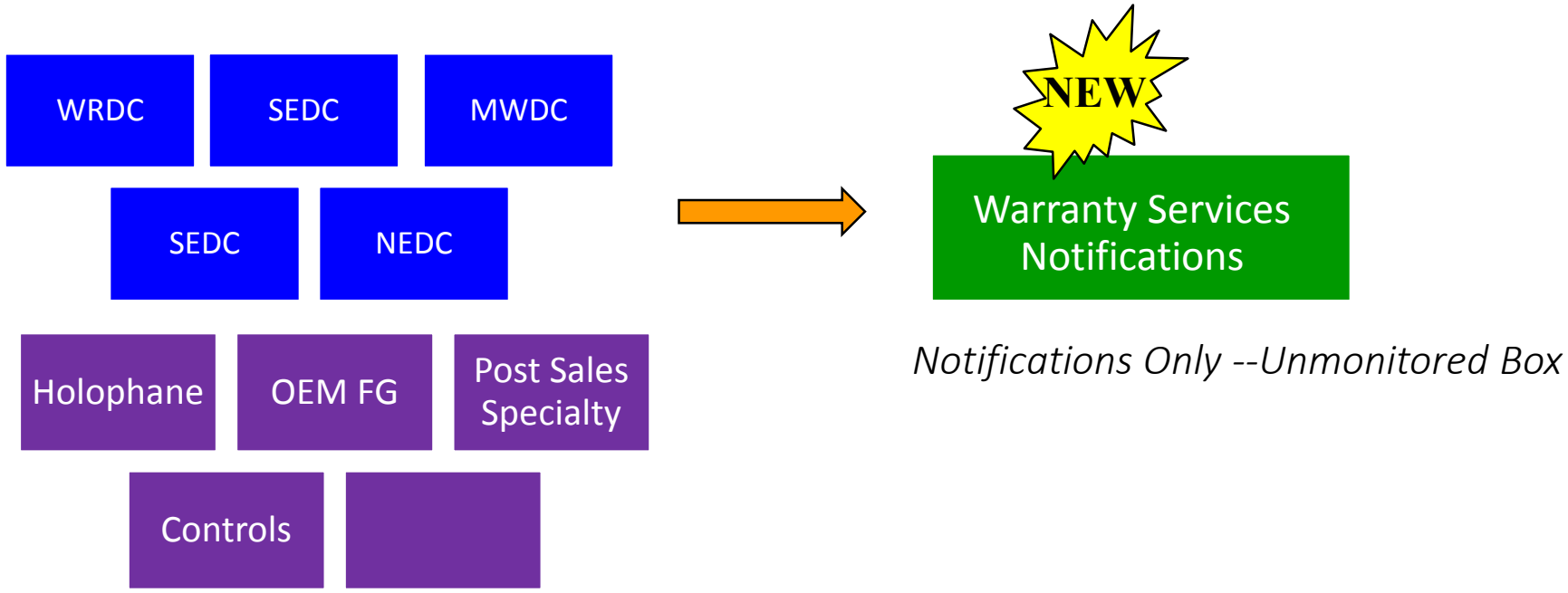
Do I still use my regional or specialty email box?

Regional Boxes and Specialty Boxes

Will now be used primarily for manual claim processing for customers that do not have access to AGILE RFC tool. If you have a general question not related to a specific claim, call 800-705-SERV (7378).

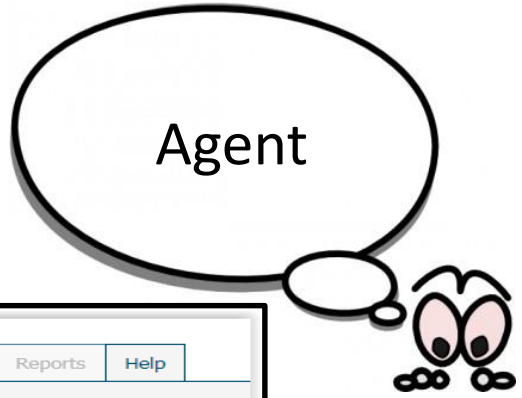
"DoNotReply– Warranty Services Notifications" – Unmonitored response mailbox to be used to provide notifications emails to you (Do Not Reply)

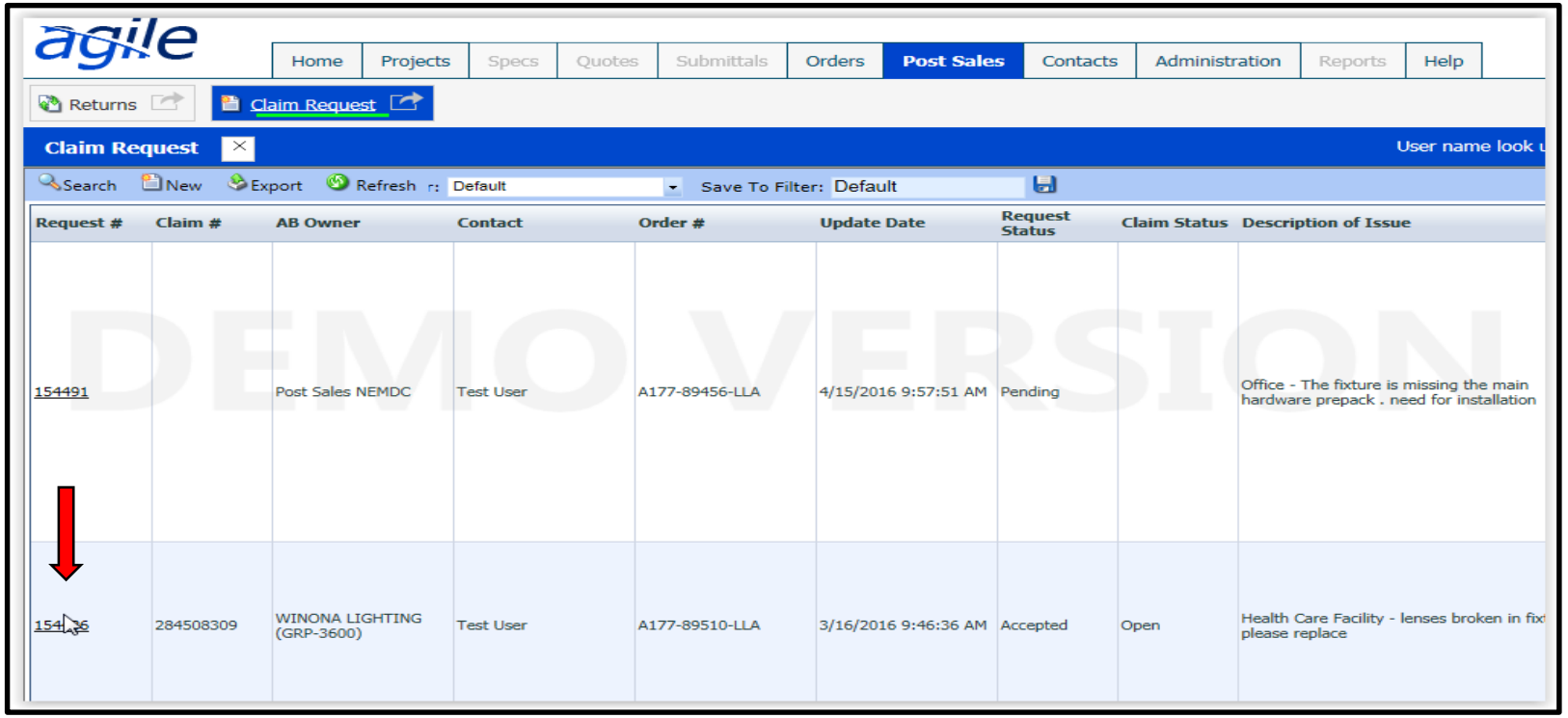


Notifications Only --Unmonitored Box

Agent RFC Step-by-Step

1. Select and click on a claim Request # hyperlink from the AGILE dashboard to open the Request





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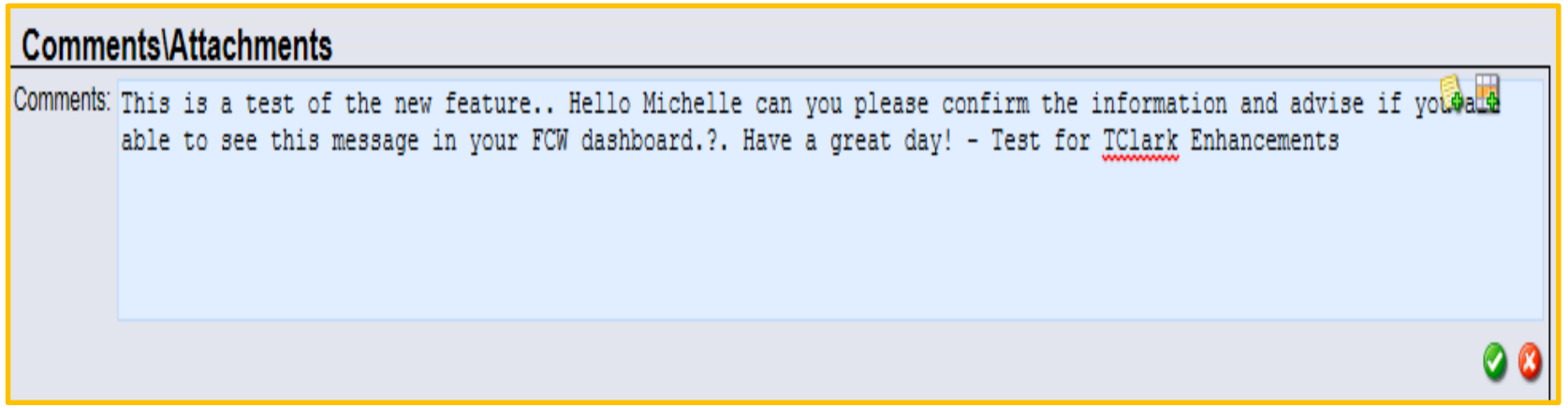
Agent RFC Step-by-Step

2. Enter a message or add attachments in the comments section and save



3. The Status on the RFC dashboard changes to “Message Sent”

154462	284508298	Post Sales NEMDC	Test User	A177-6164-LLA	5/3/2016 11:33:39 AM	Message Sent	Open	Library	this is not working

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Acuity FCW Step-by-Step

1. Message appears on the claim owner's FCW dashboard under the "Claims Action Required" section
2. Date due is 24 hours from the original request date
3. Click on the claim number hyperlink

Unread messages turn Red if unanswered Within 24 HRS

ns fcwtest

Claims Action Required

Claim #	Job Name	Agent	Action Required	Due
480214-284508331	2015 KICK-OFF STOCK PROMO	A065	CC, please approve RA and if under $500DSP, OK to Hold Scrap, Over $500 DSP return to WRDC	01/01/1900
480214-284508309	Vikings Stadium	A177	This is a test to add comments after the request has been accepted and the claim is open.. Teresa Clark	04/27/2016
480214-284508309	Vikings Stadium	A177	Test	04/27/2016
480214-284508309	Vikings Stadium	A177	This is a test of the new feature.. Hello Michelle can you please confirm the information and advise if you are able to see this message in your FCW dashboard.?. Have a great day! - Test for TClark Enhancements	05/03/2016
480214-284508309	Vikings Stadium	A177		05/03/2016
480214-284508309	Vikings Stadium	A177		05/03/2016

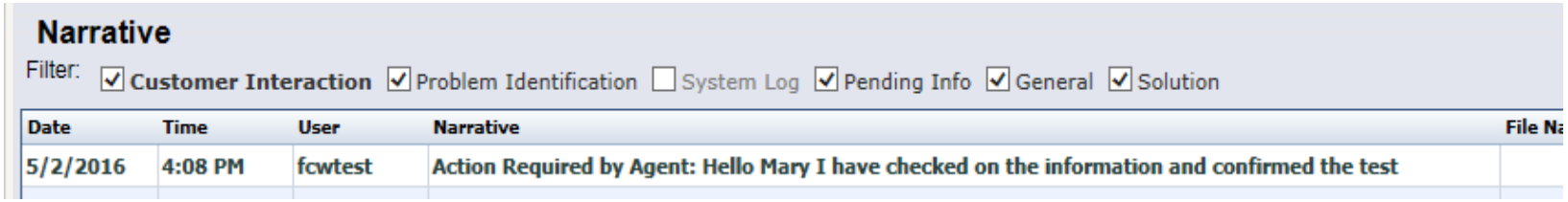
All Other Open Claims

Claim #	Job Name	Agent	Problem Identification	Cust Elapsed	Claim Age
No records to display.					

DEMO VERSION

Acuity FCW Step-by-Step

4. Post Sales enters reply in narrative and selects Action Required or Note to Agent



Narrative

Filter: ☑ **Customer Interaction** ☑ Problem Identification ☐ System Log ☑ Pending Info ☑ General ☑ Solution

Date	Time	User	Narrative	File Na
5/2/2016	4:08 PM	fcwtest	Action Required by Agent: Hello Mary I have checked on the information and confirmed the test	

5. Email will be sent to agent from the WarrantyServicesNotifications mailbox

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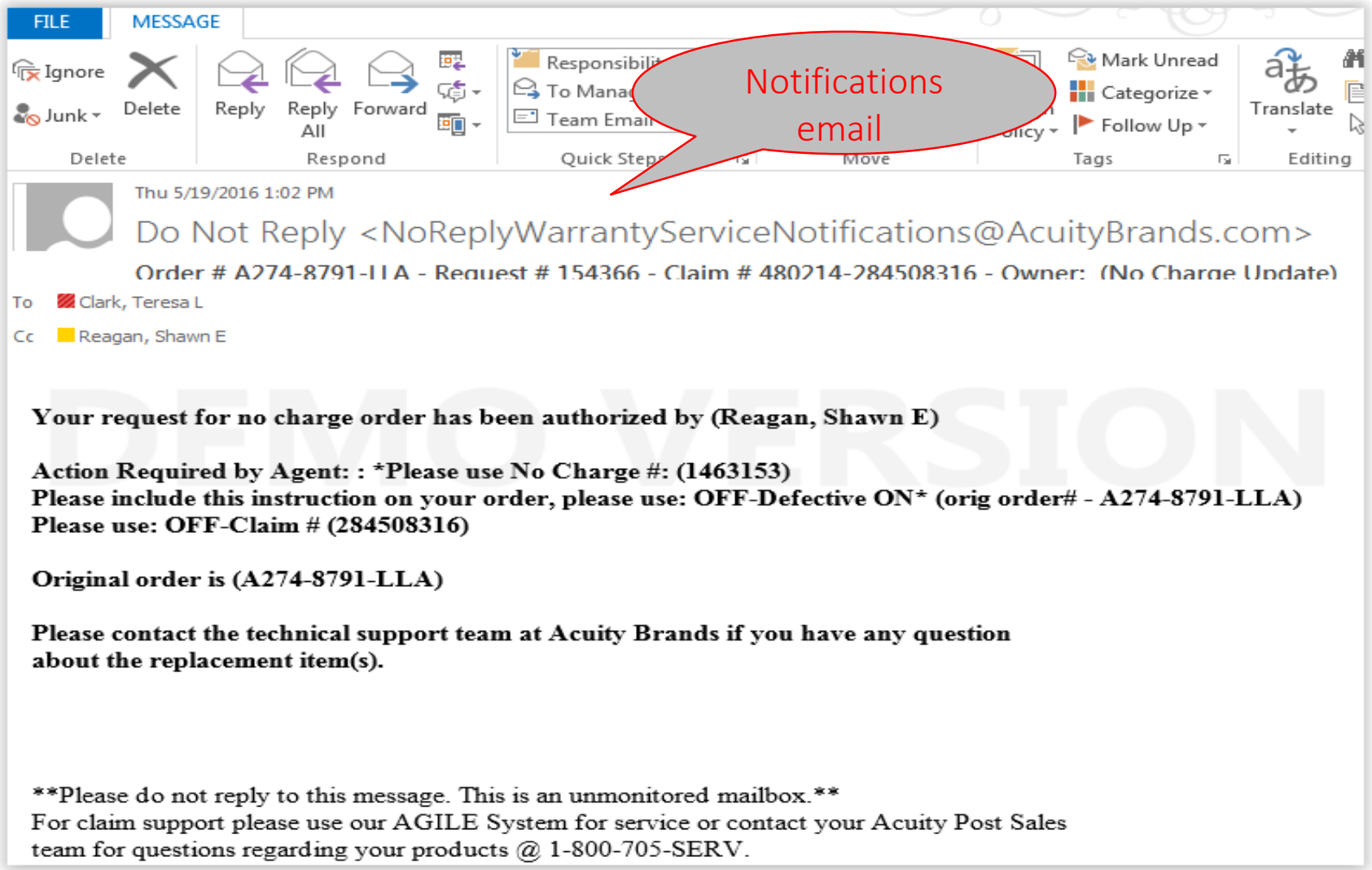
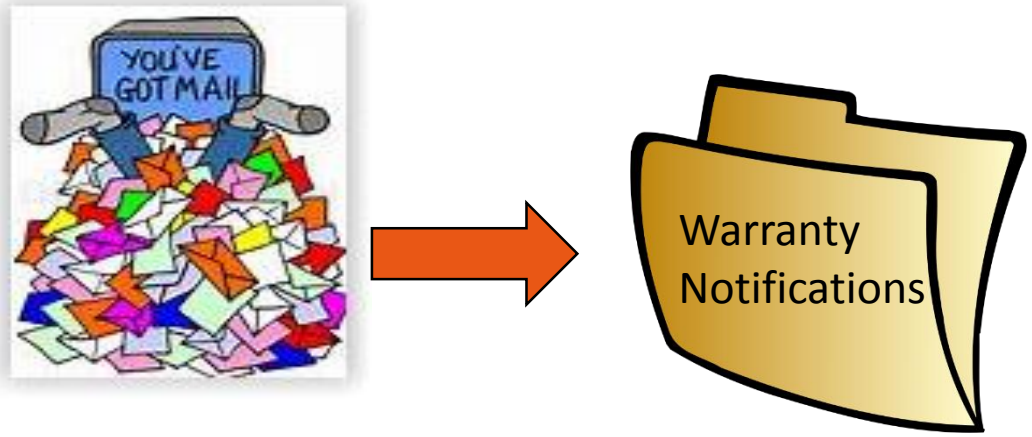
Sample Email from Notifications



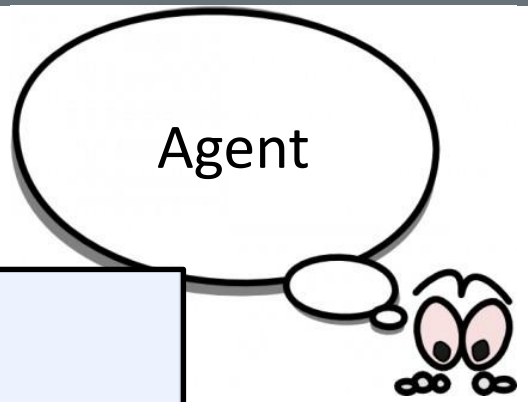
Don’t want to receive notifications?

- NoReplyWarrantyServiceNotifications are sent as a courtesy.

- If you do not wish to see these notifications, you may create a Microsoft Outlook rule to have all messages placed in a designated folder automatically



Agent RFC Step-by-Step



4. Action Required status appears on agent AGILE Dashboard

154486	284508309	WINONA LIGHTING (GRP-3600)	Test User	A177-89510-LLA	5/2/2016 4:08:54 PM	Accepted (Action Required)	Open	Health Care Facility - lenses broken in fixture please replace

5. Agent views message and clicks complete box once read to update status on dashboard

Comments\Attachments

Date	Time	User	Narrative	File Name
5/2/2016	4:09 PM	fcwtest	Action Required by Agent: Hello Mary I have checked on the information and confirmed the test	

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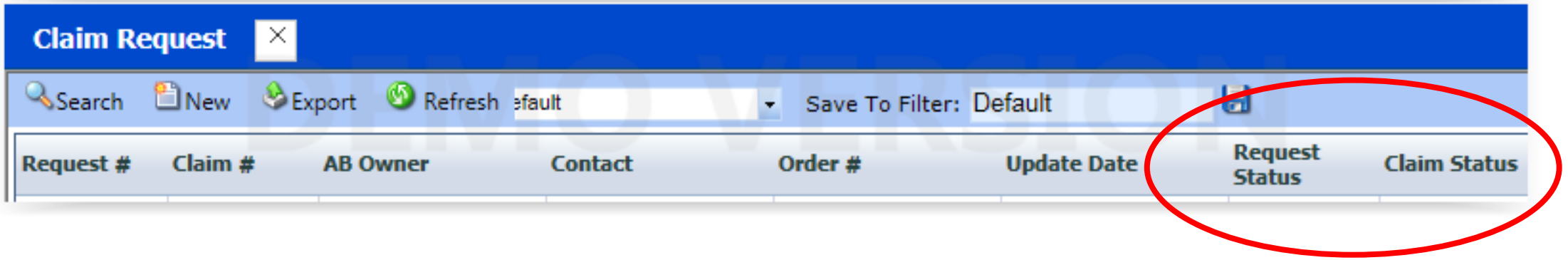
Additional Enhancement

- The Claim status (Open / Closed) will now be added to the dashboard (currently only the Request status is shown)
- RFC Status column relabeled to read: Request Status



Additional Questions?

Q How do I handle claims that I cannot process via RFC?

A Claims that have been manually entered (not via RFC) will not be visible on your dashboard.

Q Will the basic processes still remain the same?

A Yes.

Q What if I have a hot claim and need immediate response?

A Please follow the escalation process by calling our 1-800-705-SERV - Number for service

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Agenda

- Two Way Communication Tool
- **Contractor Payment Center**
- Resources for More Information

Acuity Warranty Services

Introduces the

Contractor Payment Center

Go Live June 6, 2016

What's New?

- Associates assigned to Contractor Payment Center for *Faster* invoice payment
- Dedicated email to send/receive documents and invoices as well as handle inquiries
- Dedicated *Contractors Only* telephone line for inquiries
- Warranty Team coordinates labor payments and answers contractors questions – agency can focus on next order
- Defined process handoff by Agents after Labor Claim approval
- Agent will have visibility of documents provided to contractor via RFC Tool
- Quicker invoice requirements to match record with claim – prevent aging issues with contractors

Updates to our Labor Process

- Contractors should submit ALL invoices within 60 days of the Labor Approval Date. Should a rare exception be needed, Contractor Payment Center may pre-authorize one in writing.

- All forms (including Contractor Agreement) have been updated and will be sent to contractors via the Contractor Payment Center. Blank forms agencies may have saved locally should not be disseminated after 6/6 launch date. These will not be accepted.

Benefits of the New Process

- ✓Less Paperwork for Agency: Let the Contractor Payment Center handle this for you
- ✓Contractor Q&A: Post Sales Associates accessible to Contractors
- ✓Status Updates: Allow Acuity to handle these requests. Ultimately, the faster we pay, the less we'll have.
- ✓Faster Payments: Box will be monitored daily to ensure faster payments

What To Expect in the New Process

Labor Approval Process: Agent will continue to be involved in obtaining and coordinating the labor estimate through the Labor Approval process.

Once the Labor Estimate has been approved by the Warranty Team:

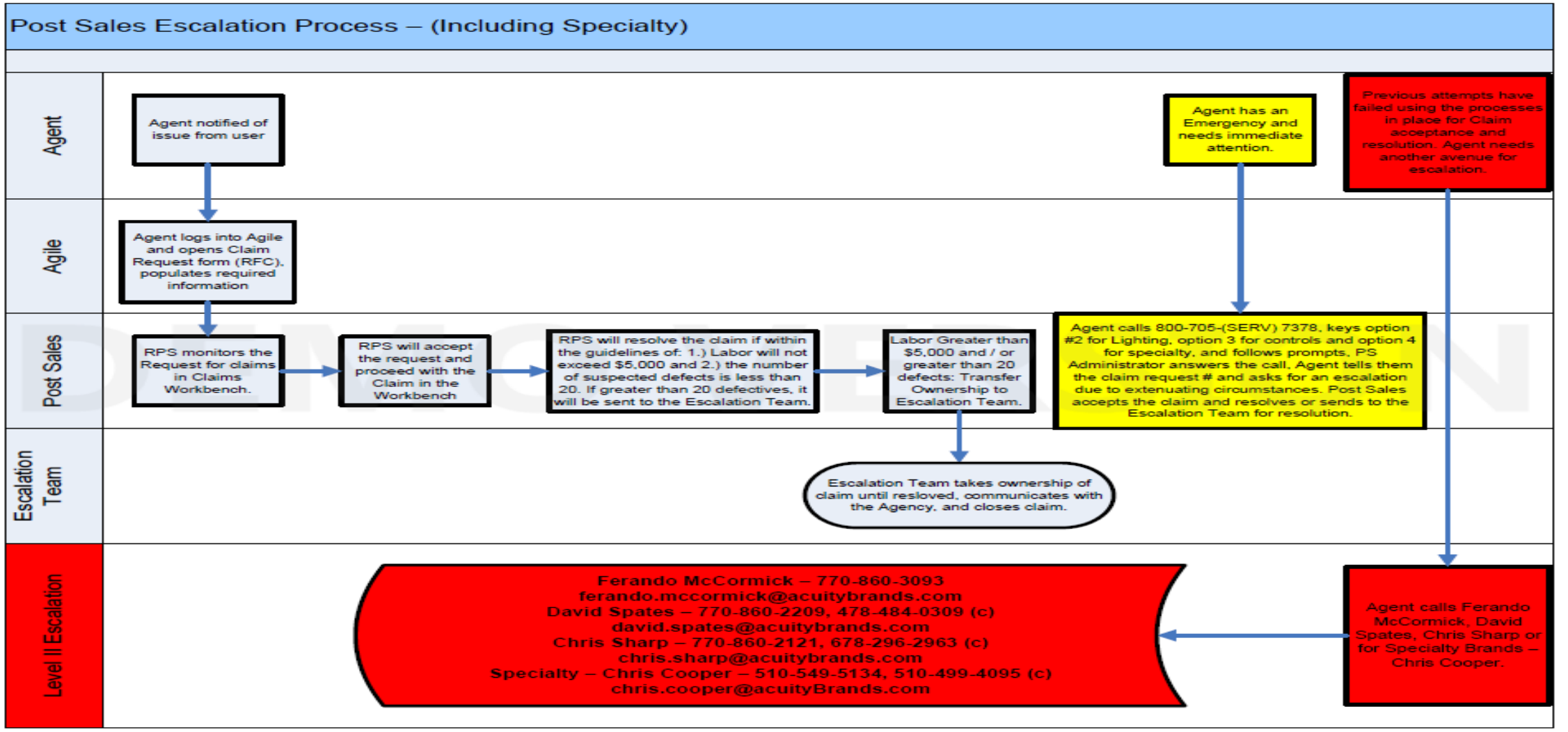
1. The Labor Approval is sent directly to the Contractor with all pre-work forms from New Contractor Email Box
2. The Agent is notified of the approval via RFC tool. Agent is no longer responsible for coordinating pre-work documents.
3. Contractors submit paperwork and documents directly to NEW Warranty email : ContractorPayments@AcuityBrands.com
4. Contractors may call our dedicated Payments Service line for inquiries (claim # required)

Dedicated Phone and Email

ContractorPayments@AcuityBrands.com

1-855-240-5747

Escalation Process



Agenda

- Two Way Communication Tool
- Contractor Payment Center
- **Resources for More Information**
  - **Addendum Attached for Your Reference**
  - **Labor Refresher Course Offered: email teresa.clark@acuitybrands.com by Friday, June 3rd to request an invitation**

Questions

Addendum

The purpose of this addendum is to provide additional information for those who:

- Are new to the process OR
- Want a refresher on the processes OR
- Simply want to dive a little deeper

IT'S
STILL...
EASY
AS 1-2-3

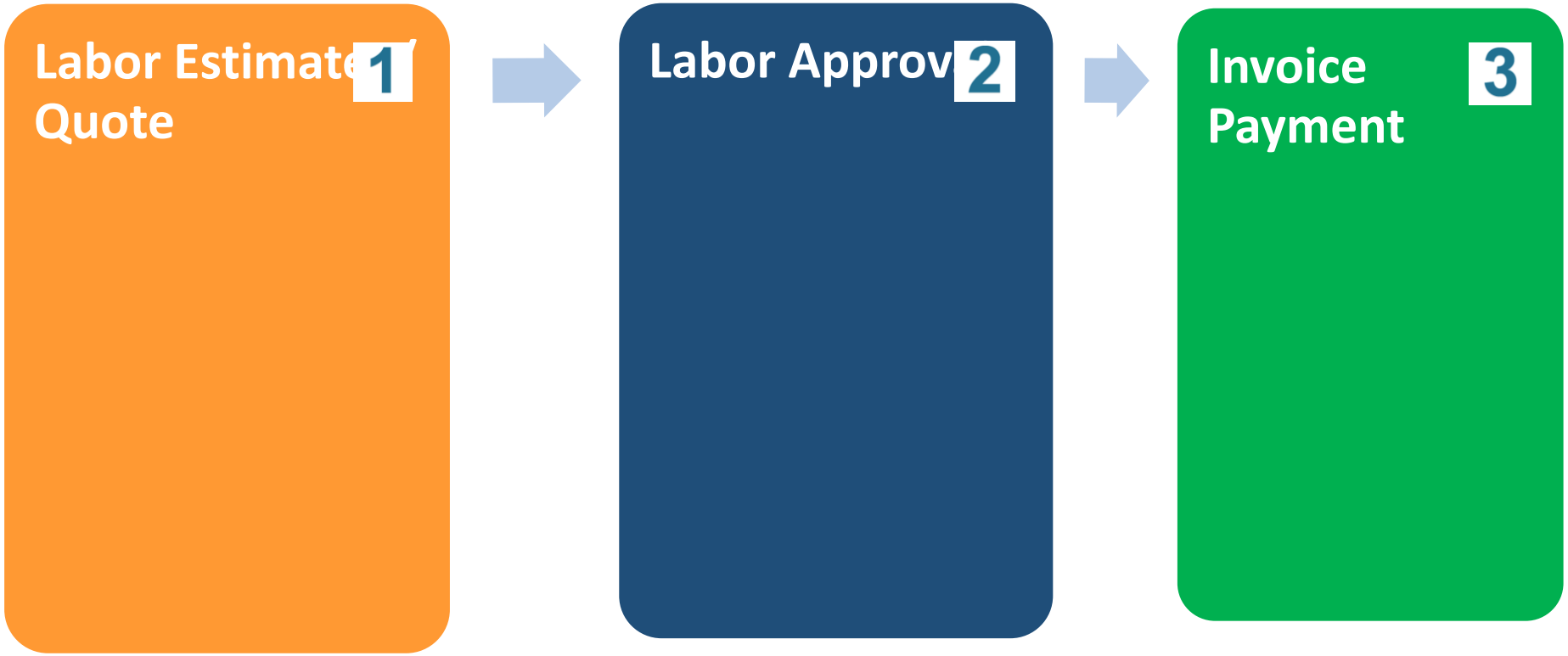
Before we get started

- *Claim must be submitted via RFC through AGILE*
- *And of course, our legal disclaimer is below!*

Labor is not covered by Acuity Brands and is not part of our written warranty or Terms & Conditions. On a case by case basis, Acuity Brands may decide to cover some or all labor costs required to resolve a warranty related issue. All labor that may result from solving a warranty issue must be reviewed and approved by Post Sales, in writing, prior to the work being performed.

The local agency and/or distributor accepts the risk and/or financial responsibility for labor performed without submitting the Labor Estimate and written approval from Acuity Brands Post Sales.

Easy as 1-2-3



1 Labor Estimate/ Quote

- Labor required for warranty claim repair
- **Agent** contacts **Post Sales** who provides Labor Estimate checklist
- **Contractor** completes estimate sends back to **Agent – Now, Contractor contact email and phone number are required on estimate paperwork**
- **Agent** returns completed estimate back to **Post Sales**

Contractor determines Labor Estimate

Acuity Labor Estimate Checklist

Small CHANGE

Agency verifies estimate / quote is complete including Contractor email and phone number

Post Sales reviews quote

Will approve or ask clarifying questions
Initiates STEP 2, Labor Acceptance Form

Labor Approval 2

- When Labor quote is Accepted, **Warranty Labor Team** provides Labor Acceptance Form and pre-work packet **DIRECT** to Contractor.
- **Agent will be notified of approval via RFC**
- **Contractor** submits all PRE WORK forms to **the NEW Acuity CONTRACTOR PAYMENTS email box**

X **Missing forms – W9, EFT, Master Services Agreement (no modifications allowed)**

X **Information doesn't match**

X **Forms not signed**

Approval =

√ **Forms signed**

√ **All forms in packet**

√ **All information matches**

** **Verified by Warranty Labor team**

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3 Invoice Payment

- **Contractor** submits complete invoice to **Acuity Contractor Payments email**
- **Post Sales validates invoice and** submits to **AP** for payment

NEW!

What's needed?

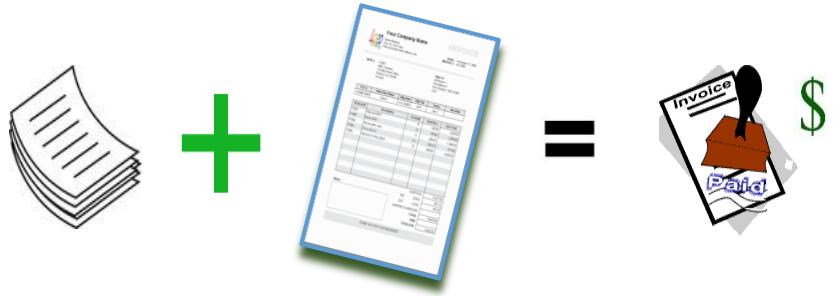
√ **Completed Invoice – per checklist**

Already Submitted in Step 2:

√ W-9

√ Master Service Agreement (MSA) w/ Statement of Work (SOW)

√ EFT



Summary – Easy as 1-2-3

1 Labor Estimate / Quote

- Labor required for warranty claim repair
- **Agent** contacts **Post Sales** who provides Labor Estimate checklist
- **Contractor** completes estimate sends back to **Agent**
- **Agent** returns completed estimate back to **Post Sales**

Labor Approval 2

- **Post Sales sends labor approval DIRECTLY to Contractor with pre-wok forms and copies Agent via RFC**
- **Contractor** submits all PRE WORK forms to ACUITY Contractor Payments email

Invoice Payment 3

- **Contractor** submits complete invoice to Acuity Contractor Payments email
- **Acuity Warranty Labor Team** verifies invoice and sends to AP for payment

Roles and Responsibilities

Agency

- Enter RFC for claim creation
- If required forward Labor Estimate form to Contractor to review PRIOR to work start
- Upload estimate to Warranty via RFC

Contractor

- Complete Detailed Quote
- Complete Pre-work Documents
- Review new troubleshooting guides prior to requesting claim

Acuity Warranty Labor Team

- Send approval and pre-work forms DIRECTLY to Contractor and process
- Timely communication throughout the process

Revised Forms

ACUITY BRANDS LABOR ESTIMATE CHECKLIST

***THIS CHECKLIST IS NOT AN APPROVAL OR ACCEPTANCE OF LABOR, NOR DOES THIS CHECKLIST GIVE ANY AUTHORIZATION TO PERFORM WORK ON ANY ACUITY PRODUCT.**

Claim # _____ Order # _____
Fixture Description: _____
Fixture Type #: _____ CI CODE: _____

Please provide the following information in your quote or enter information below:

Contractor Name _____
Contractor Email Address (required) _____
Contractor Phone _____

_____Expected date of Service _____
_____Deadline date, if any: _____
_____Estimate number of hours to perform authorized work: _____
_____Description of labor performed: _____
_____Rate per hour: _____ Overtime required: YES / NO
_____Total Labor Quote: _____

Jobsite Conditions: (include any special circumstances. i.e. clean room, freezer, food processing etc.)

_____Are additional materials required to be purchased in order to perform authorized labor? YES / NO.
_____If yes, please describe type of equipment.
_____Store receipt Included (required for equipment rentals. etc.)

Other:

*** Acuity will only reimburse for rented equipment or reasonable fees for equipment not on job site. Equipment available on site, owned or leased, is not allowable for reimbursement.*
**** Labor includes only time and materials. Cost such as travel, tolls, burden, overhead, meals etc. will not be reimbursed.*
***** Labor requests which are not pre-approved are subject to denial.*
***** Please allow 2 Business days for a response; when urgent, please call Post Sales (Warranty) Team for faster service.*

Rev. B 06/16

ACUITY BRANDS LABOR ACCEPTANCE FORM

Contractor Instructions:
Labor has been conditionally approved, on the conditions listed within Step 1 & 2 as of _____
$_____ USD, Labor
$_____ USD, Equipment
$_____ USD, Material
Total not to exceed $_____ USD

Please include this Claim Number on all correspondence: _____

Step 1: Before Any Work Begins

Complete and Submit the Labor Invoice Packet as defined below. All forms are required. ***This form serves as your Checklist and your cover sheet for submitting your labor packet.***

- ☐ 1. MSA - Master Service Agreement, must be signed and returned without modifications prior to work being initiated.
- ☐ 2. Completed W-9 FORM (**Must be current Rev. Dec 2014)** - contain Physical address, signed and dated
- ☐ 3. EFT - Electronic Funds Transfer form. All banking information must be provided in order for payment to be made. If EFT is not an available option for you, return with "Opt Out" written on form and sign. Allow an extra 2-3 weeks when EFT is not selected.

Step 2: When Work is Complete

Submit a final, itemized INVOICE . Requirements include:

1. Billed to: ACUITY BRANDS
   1400 Lester Road
   Claim # _____
   Conyers, GA 30012
2. Must include an invoice #, invoice date and all supporting receipts
3. No hand-written invoices will be accepted.
4. Remit to name and address
5. Must submit within 60 days of labor approval date. Invoices submitted after 60 days will not be paid unless prior written approval has been given.

Failure to complete and return forms before final invoice may delay payment processing. All fields are required in order to expedite payment. Missing forms or information may delay payment process.

Additional Instructions:

- ☐ **All Pre-work forms are required to be returned to Post Sales PRIOR TO WORK beginning. (MSA, W-9 and EFT)**
- ☐ Review and VERIFY that every form meets the criteria stated above
- ☐ Use this Approval Form as the checklist
- ☐ Invoice must be complete with all required information
- ☐ **All forms should be returned to** ContractorPayments@AcuityBrands.com

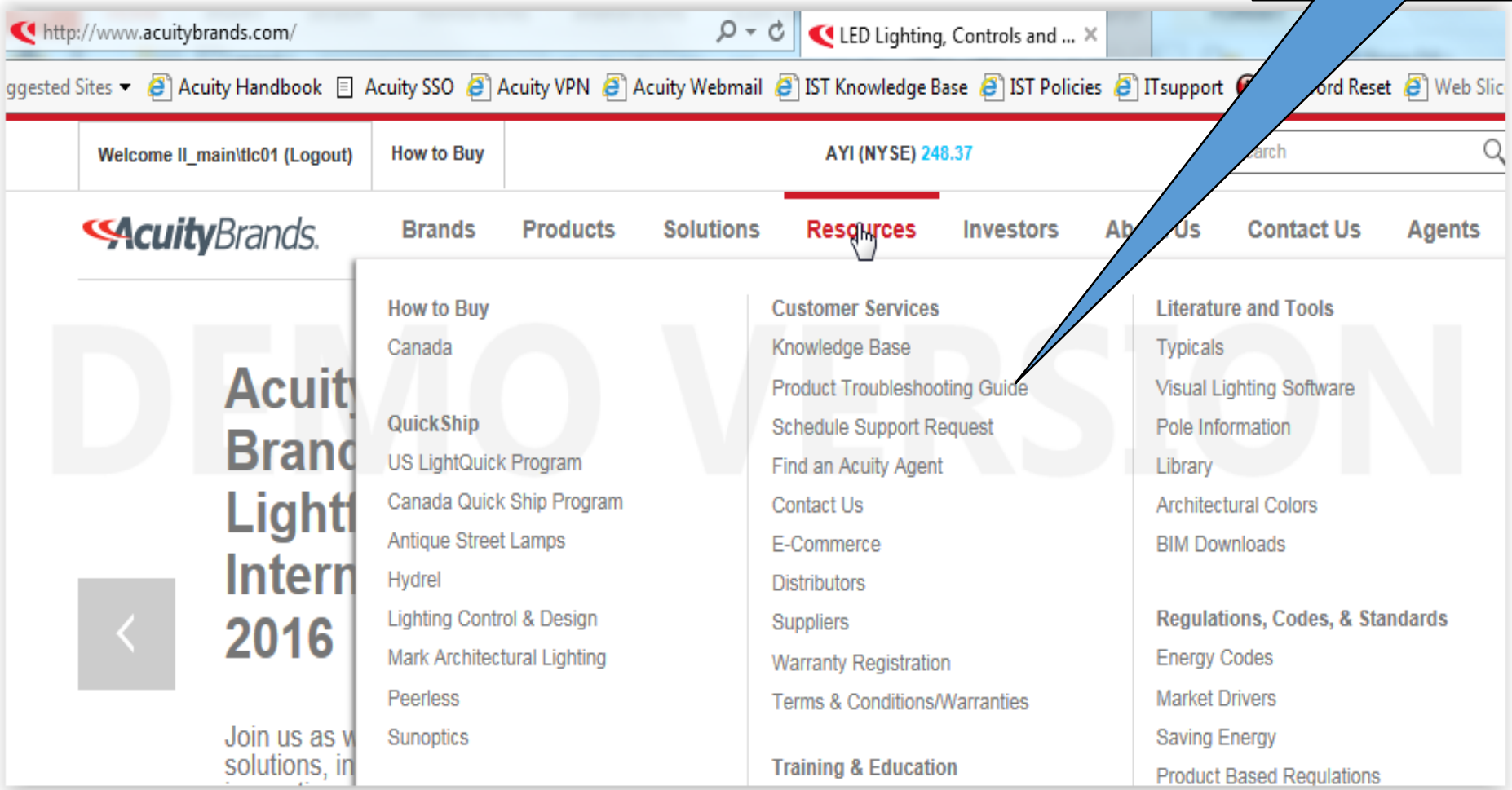
Rev. B 06/16

SAMPLE DEMO VERSION

Troubleshooting Guides ….. NOW Available on our Website !!!

- Before reporting your issue, you might already have an answer..

- We now provide basic troubleshooting steps that you can perform to solve your own issue or to help us better understand and diagnose your problem

AcuityBrands.com

- Go to AB.com
- Click Resources
- Click “Product Trouble shooting Guide”