

Application Note #799

Revision A October 2021

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:

3-Final rev 🔽		
Summary	Item	Details
✓ 1st floor		Ballroom Entry keypad
Ballroom		Palladiom HQWT-U-P4W-WH
Gallery		Keypad US 4 Button Architectural Matte Post-defined Custom No Yes White
0	~	

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

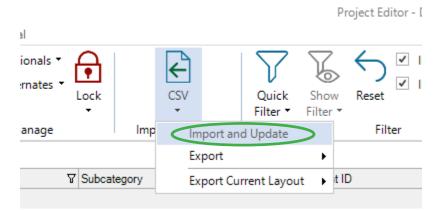
D-Tools will use this name as the unique identifier ("Component ID") to avoid duplicating line items when you import future changes.

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

3-Final rev				
Summary	Revisions			
	Drag or select a file to Import			c
Ballroo	3-Final rev 💉	Export	Duplicate	Delete
Gallery Great ⊦	Revision 2	Export	Duplicate	Delete
Study	Revision 1	Export	Duplicate	Delete
2nd floor	Revision 0	Export	Duplicate	Delete V
3rd floor	Start Blank Revision			
Accessor	Revision History			

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.
- "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 - Ma	p CSV columns to appropriat	te databas	se fields.			
Hide exact CSV col	lumn matches			🗧 Preview: 318842	25r2 wayne manor	
CSV Column	Bom Item Field Name	Мар	^	Area	Name	Qua
Area	Location	Map		Floor 1\Bedroom	Decorative Lamps 1	1
Name	Component ID	Map		EL 110 L		
Quantity	Quantity	Map		Floor 1\Bedroom	Roller Shade 1	1
List Price	MSRP	<u>Map</u>		Floor 1\Bedroom	Alisse 1	1
Product Type	Subcategory	Map		Flage 1\Deducer	Manada 1	
Product	Model	Map		Floor 1\Bedroom	Maestro 1	1
Width1	<none></none>	Map		Floor 1\Bedroom	Pico 1	1
Width2	<none></none>	Map		Elect 10 Performance	Truck 1	
Width3	<none></none>	Map		Floor 1\Bedroom	seeTouch 1	
Width4	<none></none>	Man		Floor 1\Dining Room	Decorative Lamos 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					lı	mport and	d Updat	te from CSV	- 3188
Home Import Actions	Mass Update	Export Manage	X Delete	Product Map to		All (34)	New (0)	Matched (0) Filter	Inade (3
🗦 ltems	(Total:	34)							
Drag and	drop a co	lumn here	to group	by that colu	ımn.				
⚠	U In	Catalog	∀ Quar	tity ∇ M	lanufactur	er		⑦ Moo	del
Δ	Ш			1				H/	√-A200
≙	Ш			1				Si	voia QS
≙	Ш			1				Ke	eypad
^	m								

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.
- 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 U	Jpdate from CS
Home				\sim
Import Mass Expo	ort Delete	Product Labor		Matched Ina
- Update	je	Map to Catalog	(34) (34)	(0) Filter
New	-			
Matched New and Matched	e to group by	r that column.		
	Quantity 1	Manufacturer	T	Model
\oplus	1	1 Lutron		HW-A2008GT
⊕ □	1	1 Lutron		Sivoia QS Wir
(A) [U]	1	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:

Justin 🗙	Account Details		
Accounts & Details	Account Name		
Returns	Account #		
Development Funds	Account Type		
Contractor Requests	Shipping Address		
Set Distributor	Generate My Catalog	Download My Catalog	Generated on 09-Jul-2021
Preferences			
Privacy Notice			
- Sign Out			
. 0 2021 Lutron Electronics Co., Inc. (v3.26.0.0)			

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.

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

SI									
Start	Home	Tools	Layouts	Quick	cBooks Int	egrations			
Find in	Find and Re		↑↑ Mass	Price	Accessories	Alternates	€ I/Os	Export Import	Queries
Projects	in Catalo Usages	bg	Update 🔹	Rules *	Update	•		Import & Export	•
🕛 Proc	ducts (Total	: 735)	(Price Type	: Retail)					
Drag and	d drop a colu	mn here	to group by	that colum	ın.				

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.

SI Map CSV File Step 1 - Map CSV	/ columns to appropriate	e database field	ds.				×
CSV Column	Database Field	Мар	Preview: myPr	ojects Item Export			
Model Number	Model	<u>Map</u>	Model Number	Item Name	Description	UPC Code	
Item Name	<none></none>	Map					
Description	Short Description	Map	AR-M16-DN-BB	KP7 REPLACEMENT DN	ARCHITRAVE DN FACEP	784276039468	3
UPC Code	<none></none>	Map	AR-M16-DN-BC	KP7 REPLACEMENT DN	ARCHITRAVE DN FACEP	784276042338	2
Standard Lead Time (Days)	<none></none>	Map					-
List Price	MSRP	Мар	AR-M16-DN-BLA	KP7 REPLACEMENT DN	ARCHITRAVE DN FACEP	784276043717	7
My Price	Unit Cost	Map	AR-M16-DN-BN	KP7 REPLACEMENT DN	ARCHITRAVE DN FACEP	784276049016	5
			AR-M16-DN-BRA	KP7 REPLACEMENT DN	ARCHITRAVE DN FACEP	784276044455	5
			AR-M16-DN-CLA	KP7 REPLACEMENT DN	ARCHITRAVE DN FACEP	784276045216	3

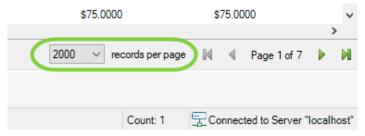
Complete the remaining Map CSV File steps.

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).

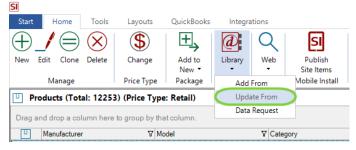


Use the Quick Filter to filter to Manufacturer = Lutron.

			D-	Tools System In	tegrator - [P	roduct Expl	orer]	
Queries	Quick Filter *	Show Filter *	← Reset	Auto-Fit All Columns	Refresh	Settings		
	Optio	ons		,			Search Manufacturers	5
	Pric	Ē	Liberty Cable Liberty Wire LIUN					
Subcategor	Manufac	cturers	Linear					
MODULE	Catego	ories	Linksys					
INVERTER FAN	Phas	ies [Marant Marine					
VENT	Vend	lors		Atlantic				
VENT			Middle	Atlantic Produ	cts			

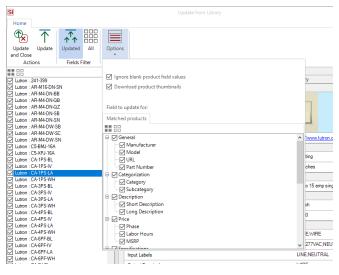
Select all of the Lutron Products and click the Home tab.

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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