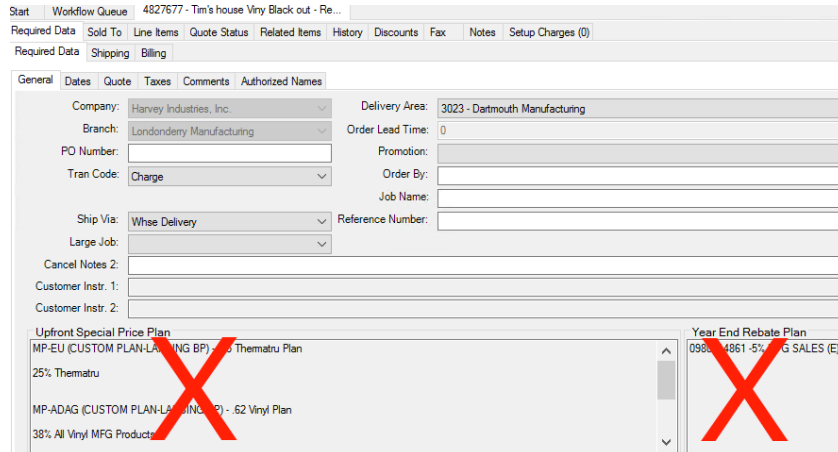


What You Need to Know: Centerpoint Transition

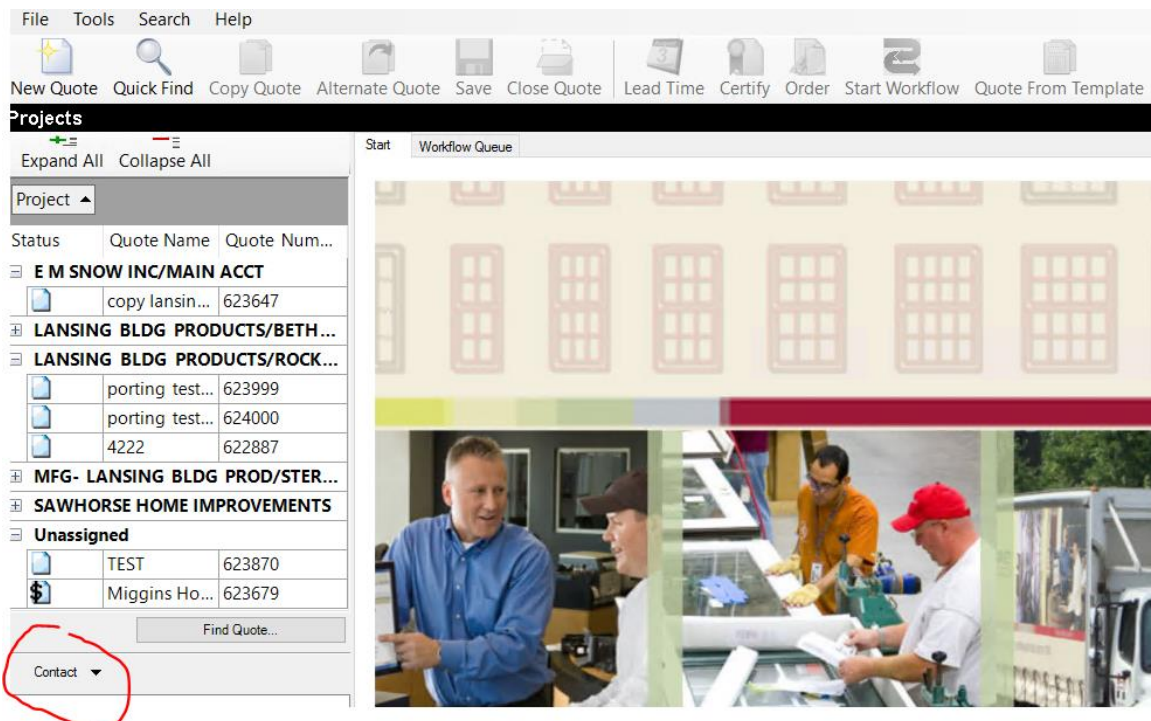
While your login credentials and the overall functionality of the Harvey window ordering software is not changing, there are a number of changes to keep in mind when managing window and door quotes in the system after the cutover.

Harvey price plans are no longer available.

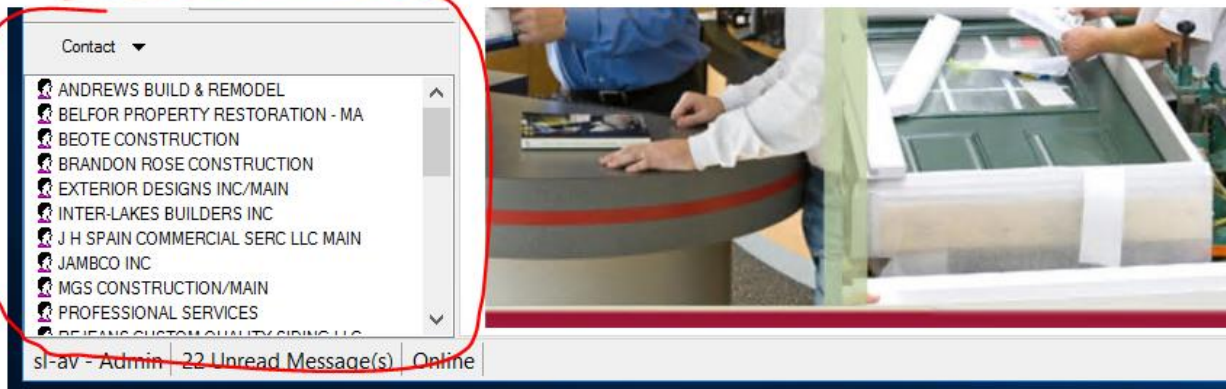


Customer contact information will need to be imported (one-time process).

In CenterPoint, click the Contact drop down in the bottom left and select Import > Import from Harvey.

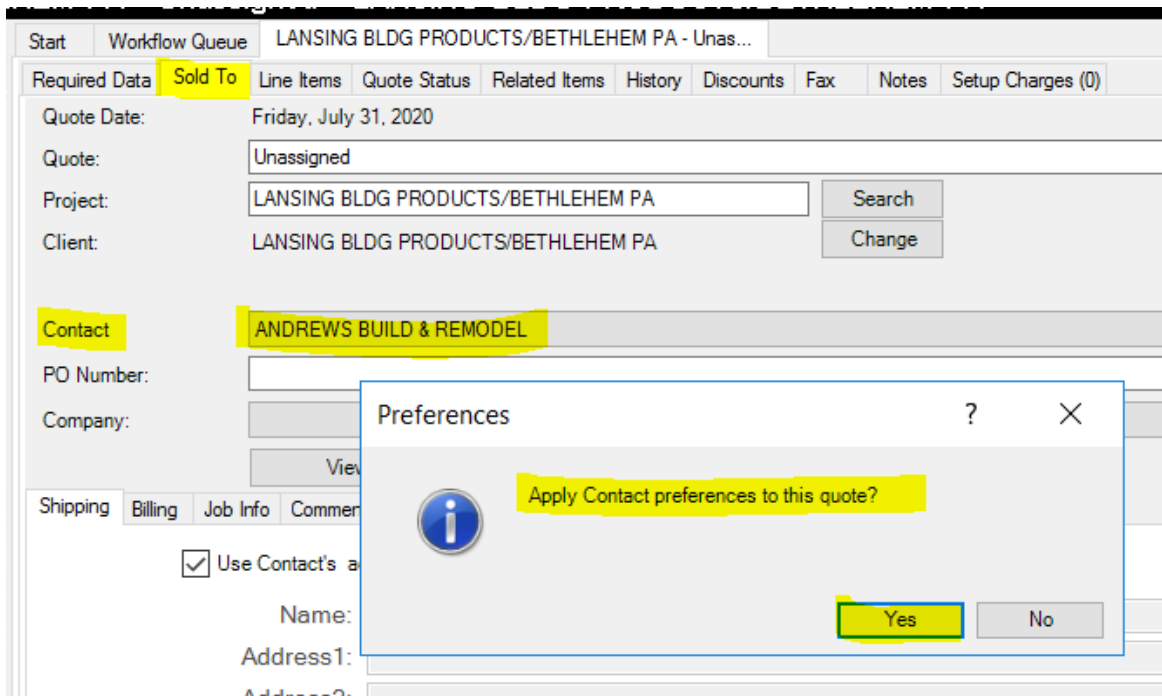


Select the .zip file for your branch and click Open. The contacts are now loaded and visible and in the Contacts pane.

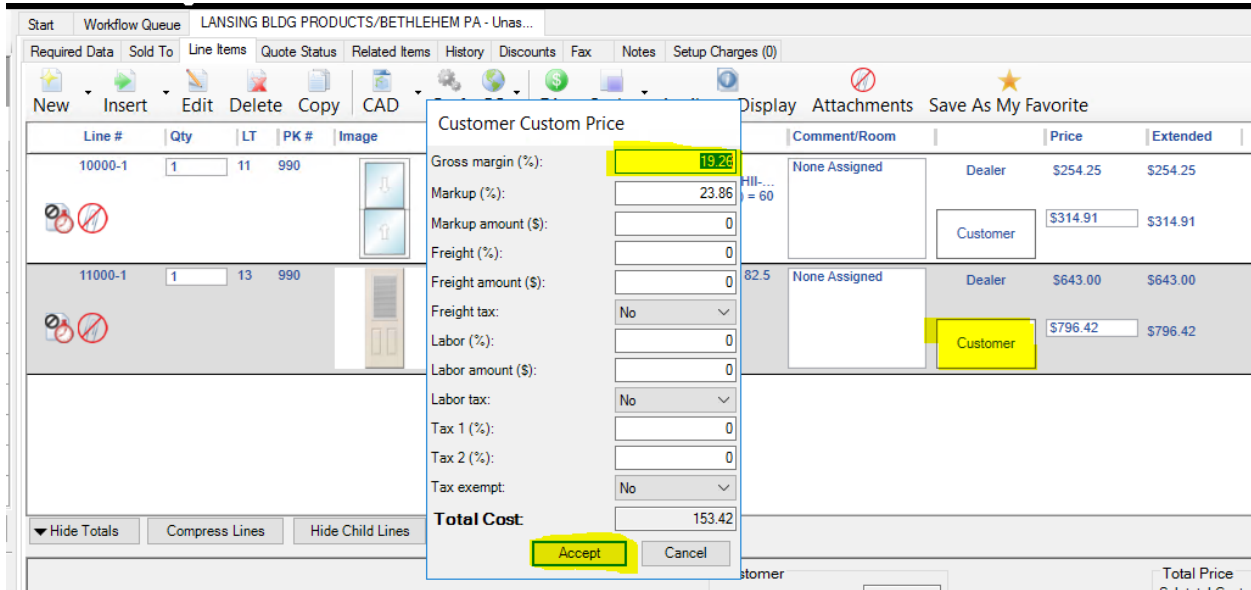


You will need to use these contacts to apply customer-specific margins to a quote.

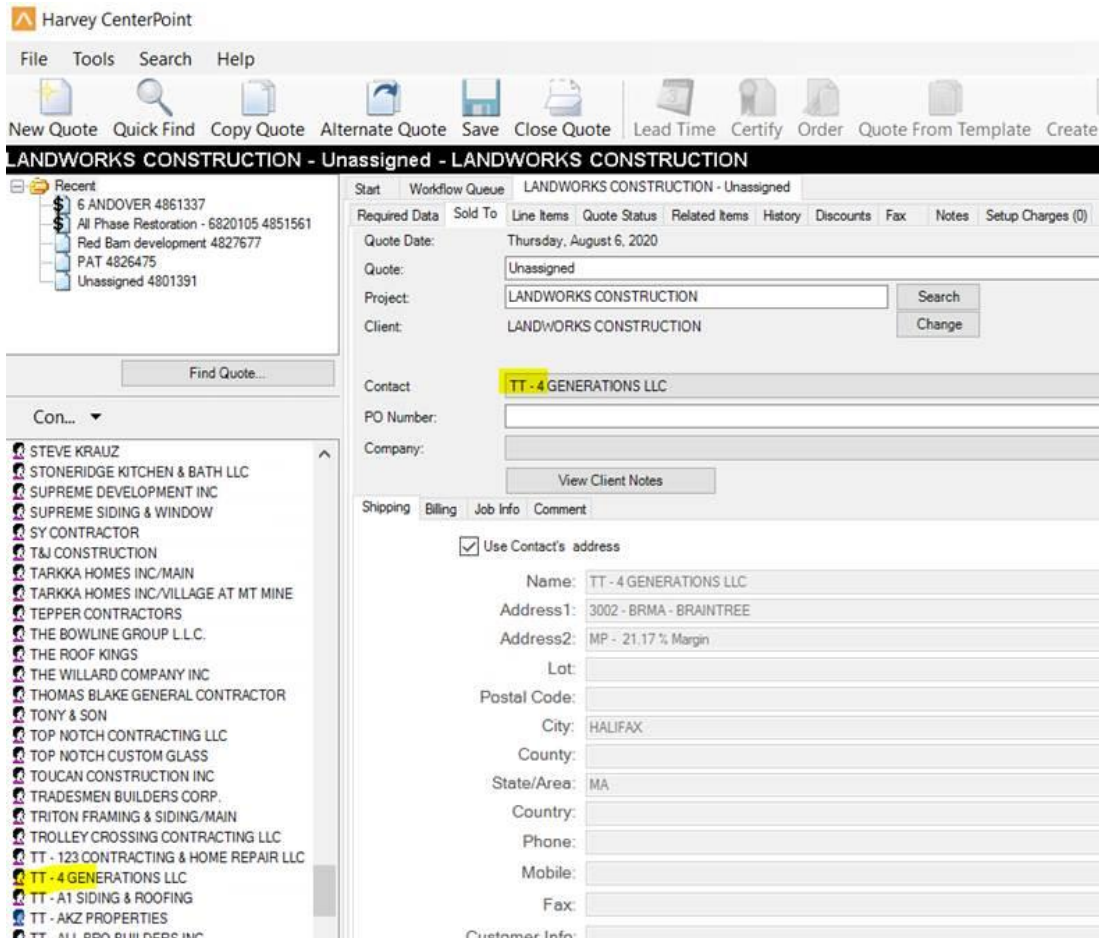
1. Click New Quote.
2. Navigate to the Sold To tab.
3. Under the Contact combo box, select the customer.
 - a. Use the standard (no TT- in front) contact to apply window margins
 - b. Use the TT- contact to apply door margins to quotes containing only doors
4. Click Yes on the Apply Preferences popup.
5. The customer's margin will now apply to the quote.



If entering a quote with doors and windows, you will need to apply a margin to the door at the line item level.



If entering a quote with only entry doors, you can use the TT- set of contacts, which include the correct margin for entry doors.



Quoting - Private Label Customers

If typing a quote for a private label customer, please make sure to select the customer's private label client at quote creation, not the normal Lansing client.

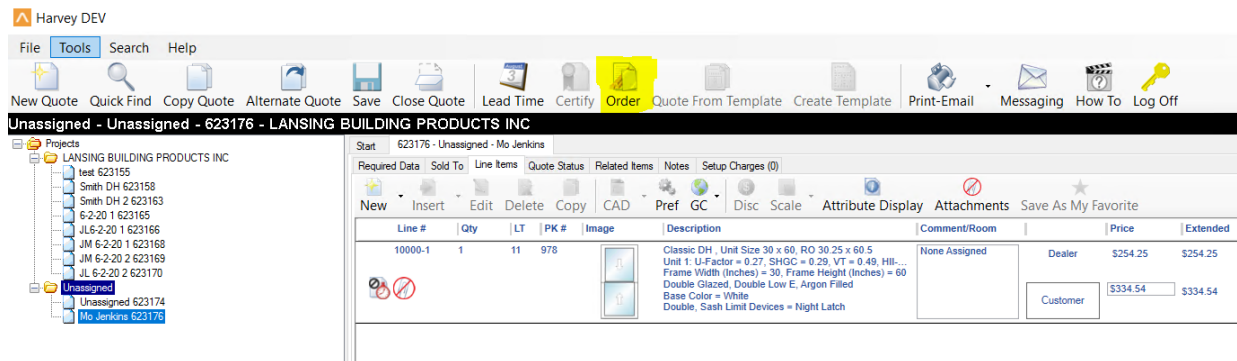
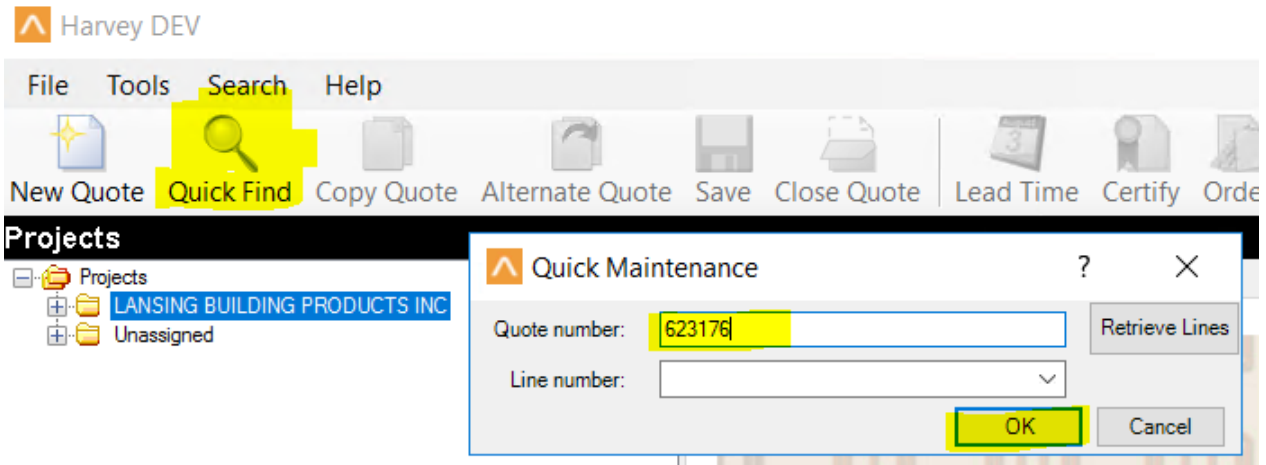
Quoting - Elite Dealer Program

Each branch will have a general elite dealer client. When typing a quote for an elite dealer, please make sure to select the elite dealer client at quote creation, not the normal Lansing client.

Customer-Submitted Quotes

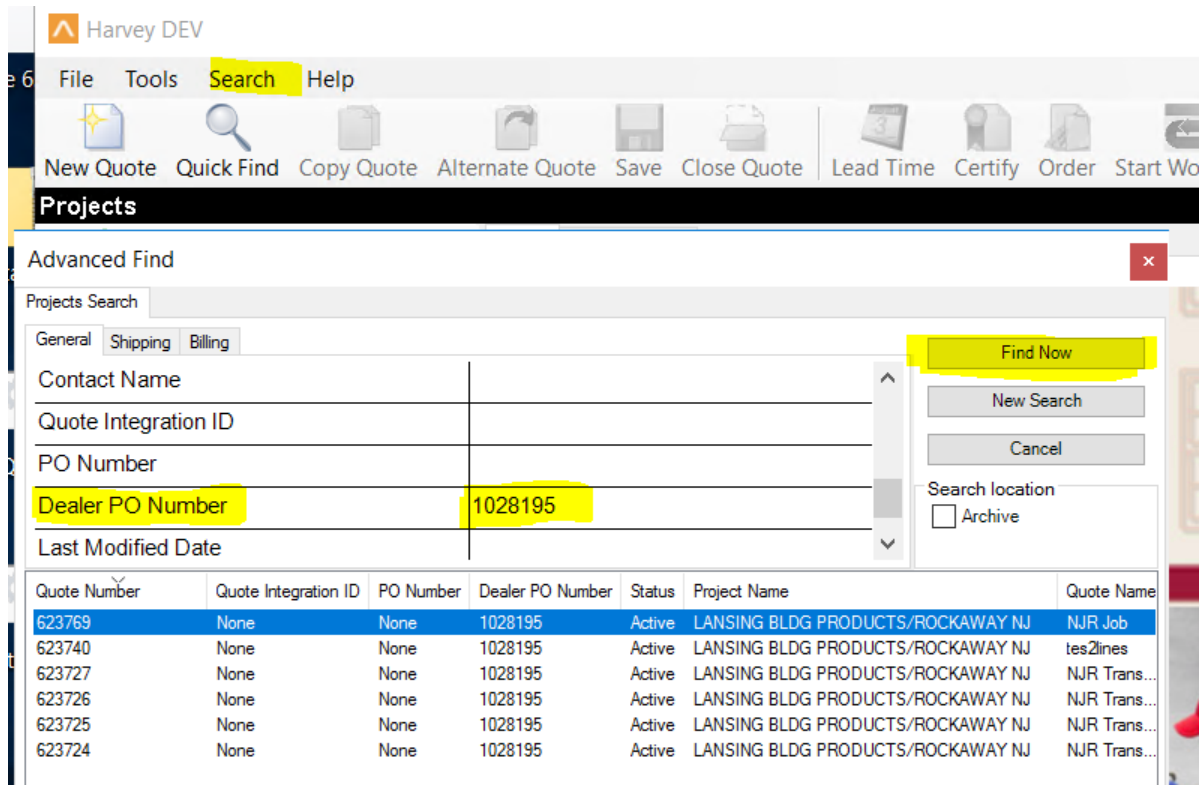
Your customers that type their own quotes will need to re-activate their ClearWin accounts by following the instructions sent to them by Harvey. They will also receive communication making them aware.

You will need to review and order customer submitted quotes.



You will still have access to historical quotes for customers who typed their own quotes.

- Customers will no longer have access.
- Use the Dealer PO field to search quotes by their old client ID to locate their historical (pre-cutover) quotes.



Harvey DEV

File Tools Search Help

New Quote Quick Find Copy Quote Alternate Quote Save Close Quote Lead Time Certify Order Start Wo

Projects

Advanced Find

Projects Search

General Shipping Billing

Contact Name

Quote Integration ID

PO Number

Dealer PO Number 1028195

Last Modified Date

Find Now

New Search

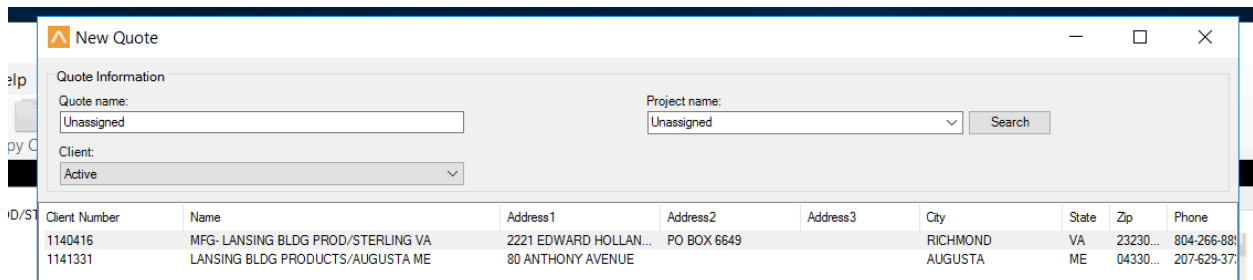
Cancel

Search location

Archive

| Quote Number | Quote Integration ID | PO Number | Dealer PO Number | Status | Project Name | Quote Name |
|--------------|----------------------|-----------|------------------|--------|-----------------------------------|--------------|
| 623769 | None | None | 1028195 | Active | LANSING BLDG PRODUCTS/ROCKAWAY NJ | NJR Job |
| 623740 | None | None | 1028195 | Active | LANSING BLDG PRODUCTS/ROCKAWAY NJ | tes2lines |
| 623727 | None | None | 1028195 | Active | LANSING BLDG PRODUCTS/ROCKAWAY NJ | NJR Trans... |
| 623726 | None | None | 1028195 | Active | LANSING BLDG PRODUCTS/ROCKAWAY NJ | NJR Trans... |
| 623725 | None | None | 1028195 | Active | LANSING BLDG PRODUCTS/ROCKAWAY NJ | NJR Trans... |
| 623724 | None | None | 1028195 | Active | LANSING BLDG PRODUCTS/ROCKAWAY NJ | NJR Trans... |

You will only see your Lansing branch(es) customers.



New Quote

Quote Information

Quote name: Unassigned Project name: Unassigned Search

Client: Active

| ID/ST | Client Number | Name | Address1 | Address2 | Address3 | City | State | Zip | Phone |
|-------|---------------|------------------------------------|-----------------------|-------------|----------|----------|-------|----------|-------------|
| | 1140416 | MFG- LANSING BLDG PROD/STERLING VA | 2221 EDWARD HOLLAN... | PO BOX 6649 | | RICHMOND | VA | 23230... | 804-266-881 |
| | 1141331 | LANSING BLDG PRODUCTS/AUGUSTA ME | 80 ANTHONY AVENUE | | | AUGUSTA | ME | 04330... | 207-629-377 |

You will have three new fields that should be filled out for every quote:

- Distributor PO
- Distributor Order
- Dealer PO – Enter Customer Name to aid in searching for quotes and labeling units

Start MFG- LANSING BLDG PROD/STERLING VA - Unas...

Required Data Sold To Line Items Quote Status Related Items Notes Setup Charges (0)

Required Data Shipping Billing

Distributor PO

Distributor Order

General Dates Quote Taxes Comments Authorized Names

Company: Harvey Industries, Inc. Delivery Area: 3021 - Londondery Manufac

Branch: Londondery Manufacturing Order Lead Time: 0

PO Number: Promotion:

Tran Code: Charge Order By:

Ship Via: Whse Delivery Reference Number:

Cancel Notes 2:

Customer Instr. 1:

Customer Instr. 2:

ING VA - Unassigned - MFG- LANSING BLDG PROD/STERLING VA

Start MFG- LANSING BLDG PROD/STERLING VA - Unas...

Required Data Sold To Line Items Quote Status Related Items Notes Setup Charges (0)

Quote Date: Friday, July 31, 2020

Quote: Unassigned

Project: MFG- LANSING BLDG PROD/STERLING VA Search

Client: MFG- LANSING BLDG PROD/STERLING VA

Contact (unassigned)

PO Number:

Company:

Shipping Billing Job Info Comment

Use Contact's address Create Contact