

What You Need to Know: Centerpoint Transition

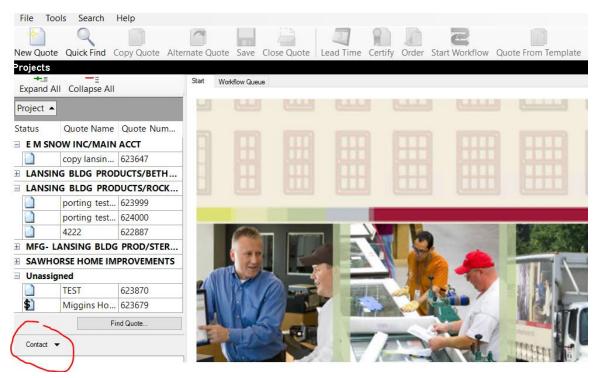
While your login credentials and the overall functionality of the Harvey window ordering software is not changing, there are a number of changes to keep in mind when managing window and door quotes in the system after the cutover.

Harvey price plans are no longer available.

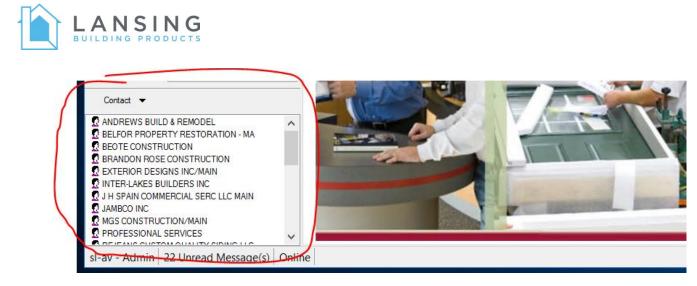
Start Workflow Queue 482767* Tim's house Vmy Black out - Re Required Data Sold To Line items Queue Taxes General Dates Queue Taxes Company: Harvey Industries, Inc. Delivery Area: 3023 - Datmouth Manufacturing Order Lead Time: 0 Order Ward Order By:	
Required Data Shipping Billing General Dates Quote Taxes Company: Harvey Industries, Inc. Delivery Area: 3023 - Datmouth Manufacturing Branch: Londondemy Manufacturing Order Lead Time: 0 PO Number: Promotion: Promotion: Tran Code: Order Order By:	
Company: Harvey Industries, Inc. Delivery Area: 3023 - Datmouth Manufacturing Branch: Landondeny Manufacturing Order Lead Time: 0 PO Number: Promotion: Promotion: 0 Tran Code: Charge Order By:	
Branch: Landondemy Manufacturing Order Lead Time: 0 PO Number: Promotion: Promotion: 0 Tran Code: Charge Order By:	
Branch: Londondeny Manufacturing Order Lead Time: 0 PO Number: Promotion:	
Tran Code: Charge V Order By:	
ninga	
- Job Name:	
Ship Via: Whee Delivery V Reference Number:	
Large Job:	
Cancel Notes 2:	
Customer Instr. 1:	
Customer Instr. 2:	
Upfront Special Price Plan Year End Rebate P	an
MP-EU (CUSTOM PLAN-LA, ING BP) - 0 Thermatru Plan	SALES (E)
25% Thematru	
MP-ADAG (CUSTOM PLAN-LA (INC. P)62 Vinyl Plan	
38% All Vinyl MFG Products	

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.

Start Workf	low Queue	LANSING	BLDG PRODU	CTS/BETHLEF	IEM PA -	Unas					
Required Data	Sold To	Line Items	Quote Status	Related Items	History	Discounts	Fax	Notes	Setup (Charges (0)	
Quote Date:		Friday, July	31, 2020								
Quote:		Unassigned									
Project:		LANSING B	LDG PRODUCT	S/BETHLEHE	M PA		S	earch			
Client:		LANSING B	LDG PRODUC	TS/BETHLEHEI	M PA		C	hange			
Contact		ANDREWS	BUILD & REMO	DEL							
PO Number:											
Company:			Preferenc	es					?	\times	
Shipping Billin	ng Job Ir	Vie nfo Comme		Apply Cor	itact prefe	erences to tl	his quote	?			
	🗸 Use	Contact's a									
		Name:						Yes		No	
	ŀ	Address1:									
	,	\ddrooo?.									



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

Start	Workflow Que	LANSING E	BLDG PRODU	JCTS/BETHLE	HEM PA - U	nas							
Require	d Data Sold T	To Line Items (Quote Status	Related Item:	History [Discounts Fax	Notes	Setup Charg	ges (0)				
	_ 🛃			5	÷4, 🌖) _ (§) _	_	0		\bigotimes	*		
New	Insert	Edit Dele	te Copy	CAD					Displa	y Attachments	Save As My F	avorite	
	Line #	Qty LT	PK # I	mage	Custome	er Custom P	rice			Comment/Room		Price	Extended
	10000-1	1 11	990		Gross marg	in (%):		19.26		None Assigned	Dealer	\$254.25	\$254.25
	~			-B-	Markup (%)	:		23.86	HII) = 60				
20	\bigotimes			12	Markup amo	ount (\$):		0			Customer	\$314.91	\$314.91
				-	Freight (%):			0					
	11000-1	1 13	990	1000	Freight amo	ount (\$):		0	82.5	None Assigned	Dealer	\$643.00	\$643.00
0					Freight tax:		No	\sim				1 (_
1 CO	\oslash				Labor (%):			0			Customer	\$796.42	\$796.42
					Labor amou	nt (\$):		0					
					Labor tax:		No	\sim					
					Tax 1 (%):			0					
					Tax 2 (%):			0					
					Tax exempt		No	\sim					
	T . 1	o 11		Child Lines	Total Co	ost		153.42					
Hide Hide	Totals	Compress Lines	Hide	Child Lines		Accep	t	Cancel					
									stomer				Total Price
								_					0.1.1.1.1.0.

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

Arvey CenterPoint					
File Tools Search Help					
New Quote Quick Find Copy Quote A	Iternate Quote Save Close Qu	Note Lead Time Certify Order Quote From Template Create			
LANDWORKS CONSTRUCTION - L	Inassigned - LANDWORKS	CONSTRUCTION			
Recent		RKS CONSTRUCTION - Unassigned			
6 ANDOVER 4861337 All Phase Restoration - 6820105 4851561 Red Bam development 4827677	Required Data Sold To Line Items	Quote Status Related Items History Discounts Fax Notes Setup Charges (0) ugust 6, 2020			
- 🔁 PAT 4826475	Quote: Unassigned				
- Unassigned 4801391	Project: LANDWORK	S CONSTRUCTION Search			
	Client: LANDWORK	S CONSTRUCTION Change			
Find Quote	Contact	RATIONS LLC			
Con 💌	PO Number:				
STEVE KRAUZ STONERIDGE KITCHEN & BATH LLC SUPREME DEVELOPMENT INC SUPREME SIDING & WINDOW	Company: View Shipping Billing Job Info Commen	v Client Notes			
SY CONTRACTOR TAJ CONSTRUCTION	Use Contact's a	ddress			
TARKKA HOMES INC/MAIN	Name	TT - 4 GENERATIONS LLC			
TARKKA HOMES INC/VILLAGE AT MT MINE TEPPER CONTRACTORS		3002 - BRMA - BRAINTREE			
THE BOWLINE GROUP L.L.C.		MP - 21.17 % Margin			
THE ROOF KINGS	Lot	ten witte eine Sei			
THE WILLARD COMPANY INC THOMAS BLAKE GENERAL CONTRACTOR	Postal Code:				
TONY & SON					
TOP NOTCH CONTRACTING LLC	10000	HALIFAX			
TOP NOTCH CUSTOM GLASS TOUCAN CONSTRUCTION INC	County:				
TRADESMEN BUILDERS CORP.	State/Area:	MA			
TRITON FRAMING & SIDING/MAIN	Country:				
TROLLEY CROSSING CONTRACTING LLC TT - 123 CONTRACTING & HOME REPAIR LLC	Phone:				
TT - 4 GENERATIONS LLC	Mobile:				
2 TT - A1 SIDING & ROOFING TT - AKZ PROPERTIES	Fax:				
TT ALL DOO DUILDEDCINC	Customer Info				



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.

<mark>∧</mark> Ha	rvey DE	V							
File	Tools	Search	Help						
*		9					3	-	
New Q	uote <mark>Q</mark>	uick Find	Copy Quote	Alternate Quo	te Save	Close Quote	Lead Time	Certify	Orde
Projec	rojects			🔼 Quick Mai	ntenance		7	· >	<
	Unassign		PRODUCTS INC	Quote number:	623176			Retrieve I	Lines
				Line number:			\sim		
							ОК	Cance	1
🔼 Harvey (DEV								
	Quick Find Co			Lead Time Certify Order	Quote From Tem	plate Create Template Pri	int-Email Messaging I	How To Log Off	
Projects			SING BUILDING PROD Start 623176 - Unas	UCTS INC signed - Mo Jenkins					
🚺 te	SING BUILDING PROI est 623155	DUCTS INC	Required Data Sold To	Line Items Quote Status Related Ite	ns Notes Setup Char	ges (0)	0		
🚺 s	Smith DH 623158 Smith DH 2 623163		New Insert	Edit Delete Copy CAD	Pref GC Dis	c Scale Attribute Display	Attachments Save As M	ly Favorite	
🗾 J	5-2-20 1 623165 IL6-2-20 1 623166 IM 6-2-20 1 623168		· · · · · · · · · · · · · · · · · · ·	Qty LT PK # Image	Description		Comment/Room	Price	Extended
	IM 6-2-20 2 623169 IL 6-2-20 2 623170		10000-1 1	11 978	Unit 1: U-Factor = 0. Frame Width (Inchest	27, SHGC = 0.29, VT = 0.49, HII s) = 30, Frame Height (Inches) = 60	None Assigned Dealer	\$254.25	\$254.25
🚺 U	ssigned Jnassigned 623174 Mo Jenkins 623176		8 0	Û	Base Color = White	ble Low E, Argon Filled Devices = Night Latch	Custome	\$334.54 F	\$334.54



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 DE	EV							
6 File Tools	Search Help							
New Quote	Quick Find Copy ()			Class Queta	Lead Time	Cartifi	Order Start
Projects	Quick Find Copy (Juole All	ernate Quote	Save	Close Quote	Lead Time	e Certify	Order Start
TTOJECIS								
Advanced Find								×
Projects Search								
General Shipping	Billing					_		
Contact Name						~	Find	Now
							New	Search
Quote Integration	on ID							
PO Number							Ca	ncel
Dealer PO Number			1028195			Search locati	on	
			1020100				Archive	
Last Modified D	ate					~		
Quote Number	Quote Integration ID	PO Number	Dealer PO Number	r Status	Project Name			Quote Name
623769	None	None	1028195	Active	LANSING BLDG	PRODUCTS/R	OCKAWAY NJ	NJR Job
623740	None	None	1028195	Active	LANSING BLDG	PRODUCTS/R	DCKAWAY NJ	tes2lines
623727	None	None	1028195	Active	LANSING BLDG	PRODUCTS/R	DCKAWAY NJ	NJR Trans
623726	None	None	1028195	Active	LANSING BLDG	PRODUCTS/R	DCKAWAY NJ	NJR Trans
623725	None	None	1028195	Active	LANSING BLDG	PRODUCTS/R	DCKAWAY NJ	NJR Trans
623724	None	None	1028195	Active	LANSING BLDG I	PRODUCTS/R	OCKAWAY NJ	NJR Trans

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

	🔼 New Quote	2					—		×	
elp	Quote Informatic Quote name: Unassigned	n	_	roject name: Jnassigned		✓ Search				
py C	Client: Active	~								
D/S1	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	804-266-88	
	1141331	LANSING BLDG PRODUCTS/AUGUSTA ME	80 ANTHONY AVENUE			AUGUSTA	ME	04330	207-629-37	



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	B 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 Que	ote Taxes Comments Authorized Names					
Company:	Harvey Industries, Inc					
Branch:	Londondeny Manufacturing \lor Order Lead Time: 0					
PO Number:	Promotion:					
Tran Code:	Charge V Order By:					
	Job Name:					
Ship Via:	Whse Delivery V Reference Number:					
Cancel Notes 2:						
Customer Instr. 1:						
Customer Instr. 2:						
	gned - MFG- LANSING BLDG PROD/STERLING VA					
	BLDG PROD/STERLING VA - Unas					
Required Data Sold To						
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:						
	Info Comment					
V Us	e Contact's address Create Contact					