myVector

WEB CENTER POINT

Welcome to the new myVector Web Center Point. Vector has been charging ahead with continued investments in our business. The myVector platform is a critical tool improvement that will help us manage all aspects of our business and will enable us to successfully support you as we grow

To begin, when opening myVector in an Internet browser you will want to use either Chrome or Microsoft Edge. For the best performance, Internet Explorer or other Internet browsers are NOT recommended.

If you have not received an email to sign into your myVector account, one of our Vector Team members will be sending each of you an activation code for your unique user log-in. If you already have a paradigm account with another company your account can be linked, and you will not need to re-register. You will want to use the activation code with the same log-in credentials. This will allow you to use your same customer information such as shipping addresses. If you do not have an account, you will want to navigate to the register option and fill out your account information as a new user.

This dashboard features tiles that link to many great resources including links to our specifications and our new Dealer Resource Center including video tutorials about myVector.

One helpful tool we would like to draw your attention to is the need help? or walk me feature on the right-hand side of the screen or on the gray bar below the navigation menu. This tool will walk you through and highlight each step in the quoting or ordering process within the myVector system.

myVector
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General Terms

Client
A myVector client is a direct Vector partner. Client users have access to one or more clients who receive quotes for the items that they want to purchase from Vector.

Customer
A client orders product for a customer and may have one or more customers that they are quoting for. The customer information isn't required for the quote. In CenterPoint, users can set up unique preferences for customers that they've created in the system.

Favorites
Users can save configured lines as favorites to quickly and easily add those lines to future quotes.

Plans
Plans (also known as **quote templates**) let users create partially configured templates with their most common customers, line items, and so on, to speed up the quote creation process.

Projects
Users can group related quotes into a project.

Quote Header
The quote header refers to quote-level data that a manufacturer requires on every quote ordered in the system. It includes client information, ship dates, and other configurable fields. Users can see the configurable quote header fields on the Quote Details tab in MyVector.

Views
My Views allows the user to set up filters that find quotes that match certain criteria. For example, if there's a certain set of information that a user checks regularly—like quotes for a specific customer—they can create a saved view so that they can quickly come back to those quotes without having to resubmit their search criteria.

Categories	Features	Benefits
My Quotes	▪ Create a quote ▪ Find a quote ▪ Configure products on a quote ▪ Work with quoting tools Order a quote ▪ Generate paperwork ▪ Export quotes	Intuitive quoting and configuration tools let your users move through the quoting process quickly and support a smooth sales experience.
My Orders	▪ Find an order ▪ View order information	A searchable list of orders lets users easily keep tabs on order status, manufacturing status, and more.
My Views	▪ Create a saved view ▪ Create a one-time-search	Configurable search and filter criteria let users find the information they need without the hassle.
My Customers	▪ Create a customer record ▪ Set customer pricing preferences	Users can quickly create customer records for one-time or repeat business, and manage customer preferences.
My Plans	▪ Create a plan (quote template) ▪ Find a plan ▪ Create a quote from a plan	Create plans for specific dealers or projects to let users create and order complicated or specific quotes in less time.
My Favorites	▪ Save favorite line Items	Create templates of your most used window and door configurations to save time.

Icon Glossary

Name	Icon	Use
Copy icon		Copy item
Ellipsis menu		View more options
Gear icon		View more settings
List icon		View line items
Magnifying glass icon		Enlarge view
Pencil icon		Edit

Name	Icon	Use
People icon		View customer
Speed square icon		Special Order
Trash can icon		Used to delete item
User icon		View user settings

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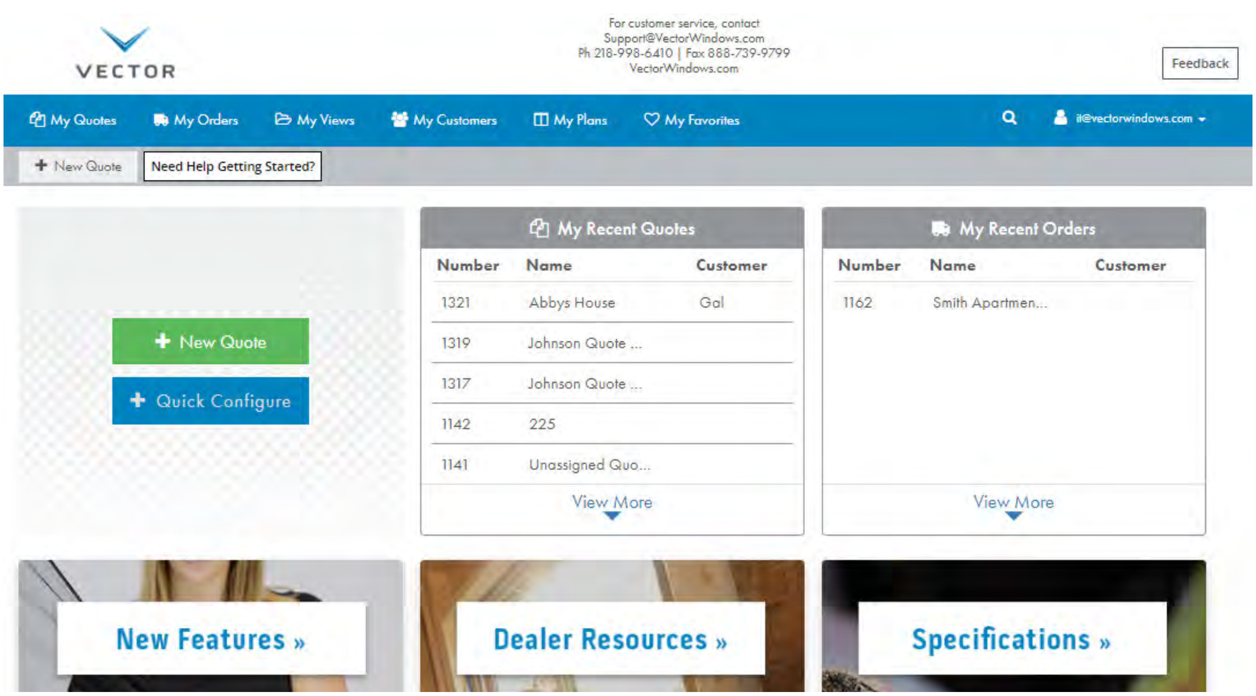
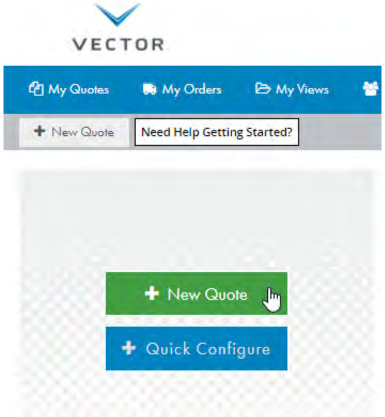


Creating a Quote



1. In the myVector navigation bar, click + New Quote.
   (The New Quote page appears.)
2. Give the quote a descriptive name.
3. Add a project name, if you would like to group/organize your quotes.
   Select your client that should be associated with the quote.

   Note: This step will be skipped and you will advance to the next screen where you can edit these options if you quote for one company location.

4. Click Create.

   The system creates the quote, automatically saves it, and assigns it a quote number.

   After you create a quote, the following tabs are available:

- Quote Details. Where you specify quote header fields and shipping/billing information for the client.
- Company. Where you add, change, or remove the company associated with the quote. (If applicable)
- Customer. Where you specify the customer that the quote is for.
- Line Items. Where you build line items using the Step, Parts, and SKU Configurators.
- Attachments. Where you add attachments and associate them with the overall quote or with individual lines.

Fill in the Required Quote Details

On the Quote Details tab, fill in the required fields within details column.

The Details column (also known as the quote header) is where you can configure fields that are essential for fulfilling the order.

Purchase Order Number - Can be filled in later but most be entered to submit order
Order Type - Select Residential or Commercial
Ship Date - Wait to select ship date until you are ready to submit your order. When you are ready to place your order pick an available bolded option from the calendar.
Promo Code - ***Make sure to fill in any applicable quote promo codes(supplied by Vector) before adding any line items***
Rush Request - Submits the rush request to customer service for approval
Order Comment for Vector - Enter any order comments

Then click Save.

Associate the Quote with a Customer

1. To select an existing customer or add a new one
   On the Customer tab of the quote, click Select Customer.

2. Find the customer you want to add in the list of customers. If you don't see the right customer at first glance, you can use the Search field to more easily find the one you're looking for.

3. When you've found the right customer, click Select.
   The Apply customer to quote form appears.

4. If you want to apply that customer's pricing preferences to the quote, select the Apply customer's pricing preferences to quote check box.
   Note: Customer-specific pricing preferences override any pricing preferences you have set in your user settings.

5. Click Save. The customer is added to the quote, and filled-in Billing and Shipping columns appear on the Customer tab.

Add Line Items to the Quote

The Line Items tab is where you add all the necessary products to a quote. Multiple configurators and tools help you quickly and easily prepare the quote for the customer.

Configure a Product

The Line Items tab is where you add all the necessary products to a quote. Multiple configurators and tools help you quickly and easily prepare the quote for the customer.

On the Line Items tab of the quote, click New Line Item.

Select a product tile.

After you've made your selections, the Step Configurator appears.

In the Step Configurator, answer all the questions to configure the unit your customer wants

A green check mark on an answer indicates that you've selected it.
Similarly, a green check mark on the step name (such as Size & Operation in the image above) indicates that all the answers in that step have been answered. If there is a red triangle with an "!" that indicates that there is missing information or an error with the selection.

Move to the next step in the configuration by clicking the step names in the navigation bar at the top, or the next step name under the last question on a page.
When your configuration is complete, click Add to Quote to add the line item to the quote and return to the Line Items tab.

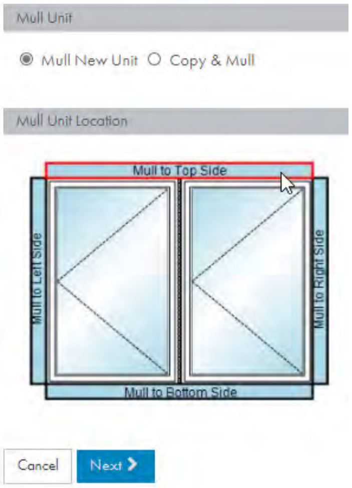
Adding and Mulling Units

You can use the Mull feature to mull a unit to your configured line item. For example, you can stack windows on top of one another, or add them side by side. For each unit you add or change, you might need to answer additional configuration questions.

Two different mull workflows are available:

Mull New Unit. Allows you to configure a new unit to mull.
Copy & Mull. Allows you to copy a previously configured unit in the current quote to mull.

Mull a New Unit



To stack a new unit on top of or beside an existing unit:

In the configurator, click Mull.

In the Step Configurator:
Under the Mull Unit option, select Mull New Unit.

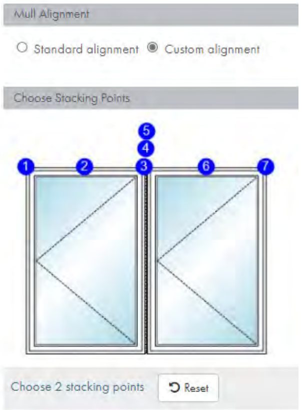
Or, select Copy and Mull to make a copy of your configured unit.
Select the side you'd like to mull it to.

Click Next.

Under Product Type, select the type of product you want to add. More configuration options appear.

Modify the default values, if desired.
Choose the alignment:
Under Mull Alignment, if you want to use the standard alignment, select Standard Alignment and click Finish. If you want to use custom alignment with custom stacking points, select Custom alignment and follow the instructions below.

Using Custom Alignment

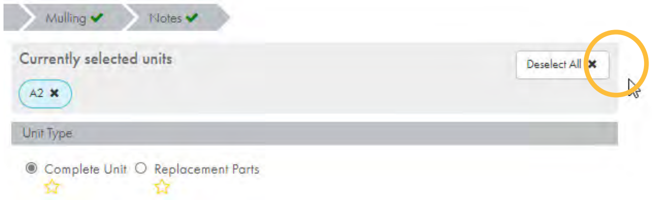


When you mull a unit and select "Custom alignment," you can select custom stacking points. This gives you more control over the design of the mulled unit.

To use custom alignment:
Choose 2 stacking points by clicking on the numbers associated to where you would like your mull to align to.

Tip: If you want to change your selection, just click Reset.
When you're done, click Finish. The step configurator returns to where you left off in the line item configuration.

Copy & Mull a Configured Unit



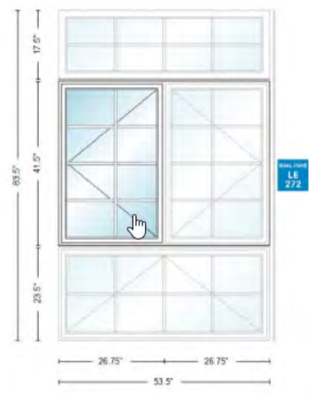
To stack an already configured unit on top of or beside an existing unit:

In the configurator, click the Mull The Mull Unit form appears.

On the Mull Unit form, select Copy & Mull.

When your mull is complete deselect all windows by clicking on the circled "x" or deselect all to add to quote.

Using Clickable Drawings to Edit Mulled Units



You can quickly edit individual mulled units or subunits. You can also select multiple units to edit them all at once.

In the drawing pane (under the List Price and Summary buttons), you can select or de-select mulled units (which are grayed out when not selected) to make your desired changes.

Alternatively, in the unit editor pane (above questions and answers on a step), you can click a mulled unit to de-select it from the pane. Or, click the "x" to exit unit editing mode.

Make the Same Changes to All Mulled Units

If mulled units aren't clicked or they're removed from the unit editor pane, you can apply changes to questions and answers for both units.
To make the same changes to all mulled units:

In the drawing pane, make sure that both unit drawings aren't selected.
Select the step with the questions and answers you want to change.
Make your desired changes.
When you're done, click Add to Quote.

Make Changes Per Mulled Unit

You can use the "Set per unit" option as an alternate way to make changes to individual mulled units. This option will be available only when both units aren't selected in the drawing pane.

In the drawing pane, make sure that both unit drawings aren't selected.
Select the step with the questions and answers you want to change.
Click Set per unit. You can now use the arrow buttons to toggle back and forth between units you're editing.
Make your desired changes.
When you're done, click Add to Quote.

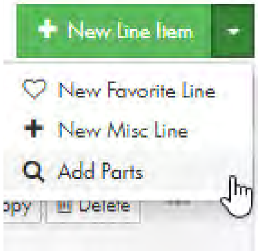
Add a Miscellaneous Line

Miscellaneous lines are a way for you to charge for additional items that you as the dealer provide to the customer. Note that you shouldn't use them to charge for items that come from Vector, as miscellaneous line data isn't sent to the Vector's system.

On the Line Items tab of the quote, click the drop-down arrow next to New Line Item and select New Misc Line.
In the Create Misc Line form, enter a description, dealer price, and quantity.
Note: If you have the appropriate security, you can also see and enter the list price on this form.
Click Create. The miscellaneous line is added to the quote, and you're returned to the Line Items tab.

Add a Part

Part lines let you add self-contained parts, like replacement hardware, to the quote.



On the Line Items tab of the quote, click the drop-down arrow next to New Line Item and select Add Parts.
In the Parts Selector, find the part you want to add by browsing or by searching for the part's number or description.
Click Add. The part is added to the quote.
Click Close to close the Parts Selector and return to the Line Items tab of the quote.

Attach Images or Documents to the Quote

On the Attachments tab, you can add images or documents that support either the overall quote or a specific line item.

By default, myVector supports file size attachments up to 2MB.

On the Attachments tab of the quote, click New Attachment.
Drag and drop the file you want to attach, or search for the file by clicking Select Files.
In the Attachment Association field, indicate whether the attachment applies to the whole quote, or only to a specific line.
In the Description field, add a short description of the attachment.
If you want the attachment to be visible only to other internal users, select the Internal Only check box.
If you want to add more attachments, repeat steps 2–5.
Click Save. The attachment is added to the quote.

On the My Quotes, My Orders, and My Views pages, a paperclip icon indicates that a quote has an attachment.

When a quote has at least one attachment, the Attachments tab shows an icon indicating how many attachments there are.

Set a Configuration Choice as a Preference

You can speed up the quoting experience by setting answer preferences. When set, that answer always defaults when it's available within a question.

In the configurator, click the star icon under an answer to set it as a preference.
In the Set preference type form, choose whether to set the answer as the default for all quotes you create, or only for quotes for the current client or customer you're quoting for.

Even after you've set a preference, you can always choose a different answer, or remove the preference simply by clicking on the star icon again. Preferences are saved only for your user, and always apply for any line item you create.

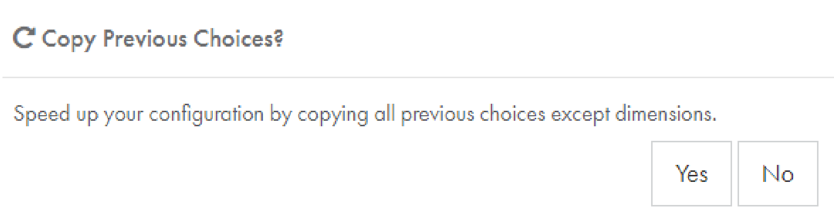
Preferences are available for all question types except dimensions.

Quickly Create a Line Item That's Identical to Another

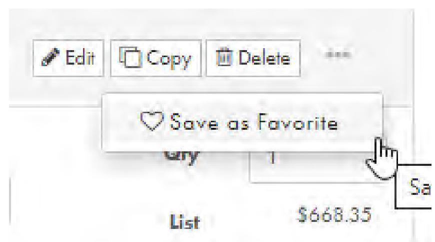
You can quickly build multi-line quotes by taking advantage of the configurator's Copy Previous Choices feature.

On the Line Items tab of a quote, create your first line item.
Add a second line item of the same type as the first. The Copy Previous Choices form appears.

Click Yes. The configurator automatically fills in all the choices you made for the first line item (except dimensions).
Specify the unit's dimensions, and make any other configuration changes as necessary.
Click Add to Quote to add the line item to the quote and return to the Line Items tab.



Create and Add Favorite Lines



You can use the My Favorites feature to save configured lines as favorites and add favorite lines to quotes. This saves time if you're frequently configuring the same or similar products in the Window & Door Configurator.

Save a Line as a Favorite
On the Line Items tab of a quote or an order:

For the line you want to save, click on the three dots to open the line's menu and select Save as Favorite.

The Save Favorite page will appear.
In the Name your favorite field, enter a name for this configured line. Click Save.

The line is now saved as a favorite.

Add a Favorite Line to a Quote

If you've saved at least one line as a favorite, you can add a favorite line to a quote.

On the Line Items tab of a quote, select New Line Item > New Favorite Line.

Your My Favorites page appears.
Select a favorite line to add. The configurator opens.
In the configurator, you can either modify the line or just click Add to Quote to add the unmodified line.

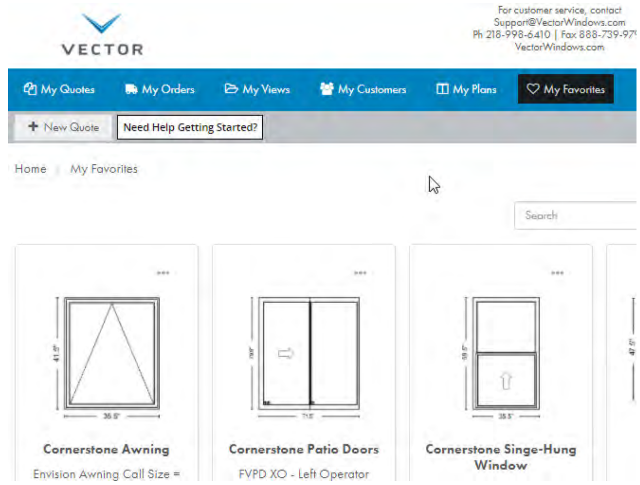
Manage Favorites

To view and manage your favorites:

Click the My Favorites button at the top of the page. The My Favorites page appears.

To rename a favorite:

Click the ellipsis (...) and select Edit Name.
The Edit Name form appears.
Change the name and click Save.
To delete a favorite, click the ellipsis (...) and select Delete.



Reorganize Line Items

If necessary, you can easily reorganize the line items on the quote.

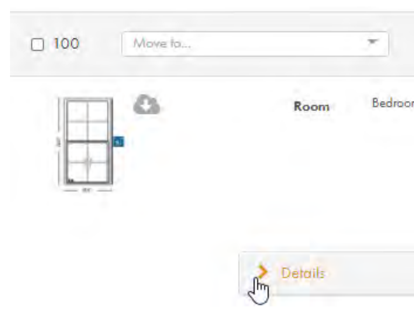
On the Line Items tab of a quote, click anywhere in the Move to list for the line item you want to move Select the line number that you want to move the current line item to. The line items are rearranged..

Expand Line Item Details

If your catalog is set up to generate parent line items with child line items (useful for on-site mulling or screens that ship separately), child lines might be collapsed under a parent line by default.

To expand a parent line to see all of its child line details:

On the Line Items tab of a quote, click Details.



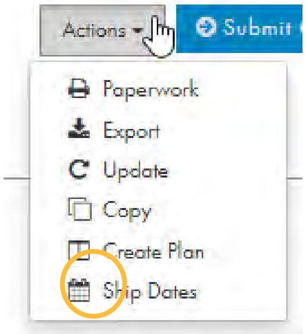
Make Changes to Multiple Lines at the Same Time

You can quickly make changes to all or multiple items on a quote with global changes.

On the Line Items tab of a quote, add multiple line items.
On one of the line items, click Edit. The Step Configurator appears.
Make any updates to the line item as necessary.
Click Save Line. The Apply Changes to Other Lines form appears.
Select which lines should also receive the updates you just made.
Click Apply Changes.

Set Different Ship Dates for Individual Line Items

After you have added all of your line items, with the actions button, you can select different ship dates for individual line items on a quote. The longest lead time on a quote determines the quote-level ship date, which appears in the Requested Ship Date field on the Quote Details tab.



To change a line-level ship date, go to Actions > Ship Dates. From here, you can:

Change an individual line item's ship date using the Ship Date field.
Change multiple line items' ship dates at the same time by selecting the appropriate check boxes and entering a new ship date in the Items Selected form at the bottom of the screen. All ship dates—at the quote level and line level—respect standard ship date exclusions.

Group Quotes by Project

You can group your quotes by project to make it easier to organize quotes on the My Quotes, My Orders, or My Plans pages. This can be especially helpful if you have several different projects that you're quoting for.

To group your quotes by project: Click the plus sign (+) next to a project name to view a list of quotes in that project.

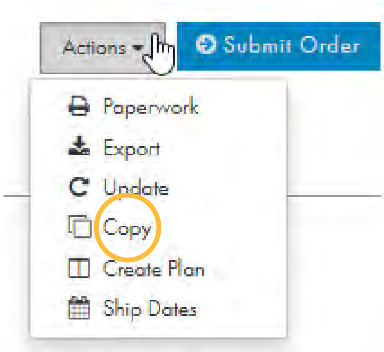
On the My Quotes, My Orders, or My Plans pages, click the gear icon.
Select the Group by projects check box. All quotes that have the same project name are grouped together.

Identify Inconsistencies Within a Quote

The Double Check feature helps you identify and prevent unintended inconsistencies across a quote.

On the Line Items tab of a quote, add multiple line items.
When you're done adding line items, click Double Check. Review the list of inconsistencies and verify that all choices are intentional. If you need to update a line, click the button in the Line column.

Create a Copy of a Quote



If you need to create a quote that's identical or nearly identical to an existing quote, you can simply create a copy of it.

Find the quote you want to copy.
Within the quote, click Actions > Copy.
Click Apply Changes.

Create an Alternate Quote

If you'd like to create an alternate quote that's based on an existing quote or order, you can use the Alternate option. Alternate quotes are useful for showing customers different configuration or pricing options without recreating the quote from scratch.

On the Line Items tab of a quote or order, select the check boxes on the line or lines that you want to add to the alternate quote. The Item Selected form appears. On the Item Selected form, click Alternate. A new quote is created, and the Quote Details tab appears.
From here, modify the quote details, add more line items, add the quote to a project, and so on.

Create a Plan

You can give yourself a head start on common quoting scenarios by creating a plan that has some of the information filled in already.

In the myVector navigation bar, click My Plans.On the New Plan page, give the plan a name, project (optional), description, and associated client. Click New Plan.

On the My Quotes, My Orders, or My Plans pages, click the gear icon.
Select the Group by projects check box. All quotes that have the same project name are grouped together.
Click Create. You're taken to the Plan Details tab of the newly created plan.
Fill out each tab of the plan as though you're filling out a quote. Include only the details that should apply to all quotes created from this plan, including customers, line items, attachments, and more.
On the Options tab, you can further configure available line item options. For example, you might want to set up a template with two specific line items already configured, then create multiple different options for a third line item.

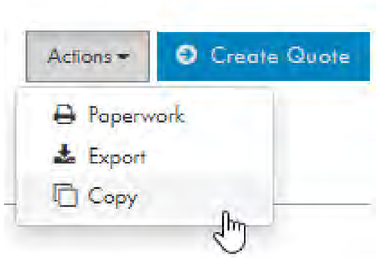
Create a Plan from a Quote

From within a quote, you can quickly create a plan for an existing quote and modify its details instead of starting a new plan.

To create a plan from a quote:

Open a quote. Then click the Line Items tab.
Within that quote, select Actions > Create a Plan. The New Plan form for that quote appears.
On the New Plan form, make any required changes. The original quote's name and project name (if available) are automatically filled in, and that quote's client is selected for you.
Give the plan a description.
Click Create. On the My Plans page, your newly created plan appears.

Copy a Plan



If you want a new plan that's similar to an existing plan, you can make a copy of a plan and modify it instead of starting from the blank New Plan form again.

To copy a plan:

Open a plan and select Copy from the Actions menu.
The Copy Plan form appears.
On the Copy Plan form, the original plan's name (with "Copy - " at the beginning), description, and client are all retained and editable. Make any required changes.
Click Copy. The new plan appears.

Create a Quote from a Plan

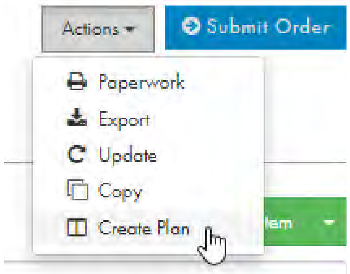
From within a plan, you can quickly create a quote with that plan's details so that you don't have to start from scratch.

After you've found a plan, open it.
Click Create Quote. A new quote is created and automatically includes the details from the plan. Add a Plan to a Project
You can organize your plans—whether new plans or existing plans—by adding them to projects. The project name next to the plan name

Notes:

To add a new plan to a project, see the Create a Plan topic. Modify the project name and click the confirmation check mark. The name is updated.
If no project has been assigned to a plan, the project name is listed as "Unassigned Project."
Add or Change the Project on an Existing Plan
To add an existing plan to a project:
Click the project name. The project name form appears.

Create a Plan from a Quote



From within a quote, you can quickly create a plan for an existing quote and modify its details instead of starting a new plan.

To create a plan from a quote:

Open a quote. Then click the Line Items tab.
Within that quote, select Actions > Create a Plan. The New Plan form for that quote appears.

On the New Plan form, make any required changes. The original quote's name and project name (if available) are automatically filled in, and that quote's client is selected for you.
Give the plan a description.

Click Create. On the My Plans page, your newly created plan appears.

Find a Specific Quote, Order, or Plan Using Quick Find

In myVector, you can search for quotes, orders, or plans through the standard search form or the Advanced Search page. Use the standard search if you know the exact number of the quote, order, or plan that you'd like to see. Otherwise, use the Advanced Search. To begin your search:

Click the magnifying glass icon in the toolbar. The search form appears. Enter the number of the quote, order, or plan that you want to find. Your search must have an exact match for any results to appear. Enter the number of the quote, order, or plan that you want to find. Your search must have an exact match for any results to appear. Click Search. If there is a match, the quote, order, or plan you searched on appears. If there is no match, the search form displays a message that says, "No Results for '####'."
or use the Advanced Search:

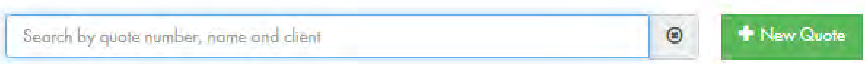
Click the magnifying glass icon in the toolbar. The search form appears.
Click Advanced. The Advanced Search page appears. This page has two sections: a Display section and a Filter section.
In the Display section's Add list, select any columns that you want to use in your search results. As you add the columns, the selected column names appear in a list.

We don't recommend selecting the All button to add all columns, as this might cause your view to time out and return no results.

In your list of selected column names, use the up and down arrows to re-order them. The order of this list (top to bottom) affects the order that the columns appear in on the search results page (left to right).
Under Filter, select one or more preliminary filters to create the criteria for your search.
Note: To see all unfiltered results, add the column names and click Search without adding any filters.
After you've selected at least one preliminary filter from the list, the More button is available. Click More to expand the list and see additional filters.
After you've selected all of your desired filters, click Search to see the results.

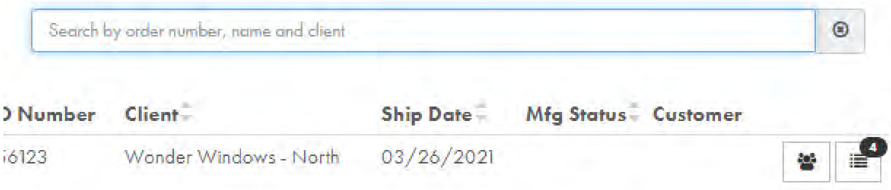
Find a Quote

In the MyVector navigation bar, click My Quotes.
External users: To see quotes created by other users, select the See data from other users check box under the gear icon.
To search for a quote within the list, use the Search bar.
To open a quote, click the:
Magnifying glass icon to be taken to that quote's Quote Details tab.
People icon to be taken to that quote's Customer tab.
List icon to be taken to that quote's Line Items tab.

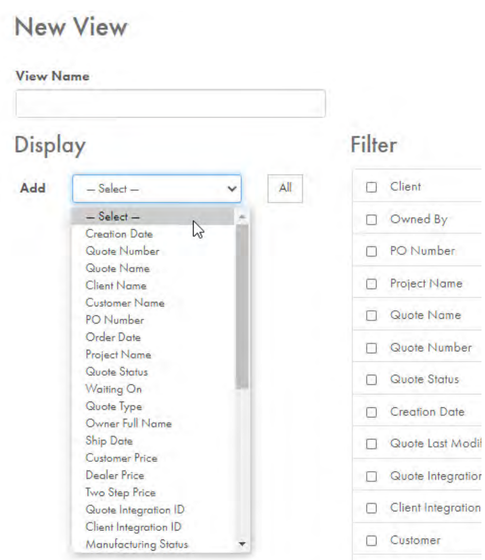


Find an Order

In the MyVector navigation bar, click My Orders. External users:
To see orders created by other users, select the See data from other users check box under the gear icon
To search for an order within the list, use the Search bar.
To open an order, click the:
Magnifying glass icon to be taken to that quote's Quote Details tab.
People icon to be taken to that quote's Customer tab.
List icon to be taken to that quote's Line Items tab.



Create a Saved View



If there's a certain set of information you check regularly, like quotes for a specific customer, create a saved view so that you can quickly come back to that information without having to resubmit your search criteria.

You can even share views so that other users in your organization can see them.

In the myVector navigation bar, click My Views.
Click New View.
On the New View page, give the view a descriptive name.
Under the Permission Level heading, choose which type of users should be able to see this view.

In the Display section, choose which columns should appear in your view.
In the Filter section, choose which criteria your view is based on—that is, which quotes and orders should be included or excluded from the search.
After you've selected at least one preliminary filter from the list, the More button is available. Click More to expand the list and see additional, secondary filters.Here are some examples of useful views, including which Filters you should use to build them:

Ordered quotes. Select the Quote Status check box and choose a status of Ordered.
Quotes and orders created by other users. Select the Owned By checkbox, and choose the Owned By Another option. (Useful for managers who needs to see quotes and orders that your employees are creating.)
Quotes and orders for a specific client. Select the Client checkbox, then click the Select Clients button. In the Select Clients window, search for or browse to find the desired client and then click the checkbox for that client. Close the window. (Useful more closely monitoring quotes and orders for strategic clients.)
Quote review. Select the Waiting On check box and choose In Review. This filters quotes that are in the Workflow Queue.
Quote type. Select the Quote Type check box and choose from the three available filters (Standard, Service, or Other).

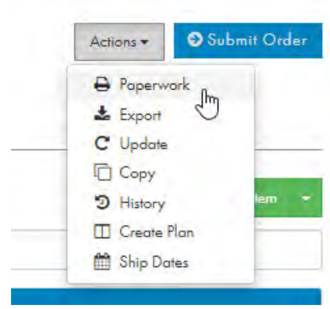
Configure Paperwork Headers

Create a Personalized Paperwork Header
You can personalize the headers that appear in customer-facing paperwork to include your company's logo and address.

In the MyVector navigation bar, hover over your user icon and click Paperwork Headers. The Paperwork Headers page appears.
Click New Header.

Give the header a name. This name is visible only to you and doesn't actually appear on the quote paperwork.
Enter your company's address.
Click Choose File, and select an image file of your company's logo.
Click Create.

How to Print Paperwork



You can find paperwork options for your quote by clicking Actions and then selecting Paperwork.

Next you can expand the paperwork options by clicking on the right arrow next to the paperwork name.

Then you can click open to veiw, download to download the paperwork, and email to email the paperwork.

Configure Pricing Preferences

In the Pricing Preferences page, you can set user-specific defaults for the starting price for every quote.

By default, customer pricing preferences override anything you set here.

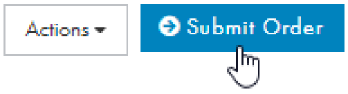
Set User-Specific Pricing Preferences

In the MyVector navigation bar, hover over your user icon and click Pricing Preferences from the drop-down menu. The Pricing Preferences page appears.
At the top of the form, choose whether you want to view markup or discount fields for applying your pricing preferences:
Markup. View the gross margin, markup percent, and markup price fields on the screen.
Discount. View the multiplier, discount percent, and discount price fields on the screen.
If you chose markup preferences, fill in the following fields:
Gross Margin. For Markup preferences, users can set a customer price by gross margin percentage increase from dealer price.

Markup. The markup percentage or dollar amount from the dealer price.
Tax 1. Tax to apply to the customer price.
Tax 2. Additional tax to apply to the customer price.
Freight. Fee charged for freight expenses.
Freight Taxable. Taxable fee charged for freight expenses.
Labor. Fee charged for labor expenses.
Labor Taxable. Taxable fee charged for labor expenses. If you chose discount preferences, fill in the following fields:
Multiplier. For Discount preferences, the customer price is set via a multiplier.
Discount. The discount percentage or dollar amount from the list price.
Tax 1. Tax to apply to the customer price.
Tax 2. Additional tax to apply to the customer price.
Freight. Fee charged for freight expenses.
Freight Taxable. Taxable fee charged for freight expenses.
Labor. Fee charged for labor expenses.
Labor Taxable. Taxable fee charged for labor expenses.

How To Place Your Order

To submit your quote to an order, click on the blue submit order button.



Then a pop-up will appear to confirm that you wish to submit your order.

Select OK.

Then your order will be submitted to Vector and will appear in your My Orders tab.