



CounterSwift Overview/Instructions

The CounterSwift vanity program by Rumford Stone is for semi-custom vanity top and accent pieces. The program offers all our stock quartz color options! This tool allows you to get your quote and place your order in just minutes. If details are more complex than the order tool allows, Rumford Stone will happily provide you with a custom quote. For any questions or concerns, please reach out to Kristen Lachance, Sales and Marketing Manager- klachance@rumfordstone.com or (603)-630-5558.

The CounterSwift program is designed for you to use with your contractors or retail customers. It allows you to preset/adjust the mark-up as well as allows you to add a discount in either a percentage or dollar amount.

To get started, go to rumfordstone.com/dealers/counterswift.

- **Username and password are provided by Kristen.** Please contact her directly if you need a new log-in.
 - You may have one account for your entire team or individual accounts, that is up to you!
- Once logged-in, you will see **your Dashboard**.

Welcome, Kristen Lachance CREATE ESTIMATE					
Test Dealer					
Latest Estimates					
Date	Job Name	PO #	Wholesale	Retail	Actions
Dec 12, 2022	Kennebunk- Jamie	100	\$2,265.00	\$3,398.00	Edit Approve Archive
Dec 02, 2022	Test 3	999997	\$295.00	\$295.00	Edit Approve Archive
Dec 02, 2022	Test Instructions	501502	--	--	Edit Approve Archive
Nov 23, 2022	Martha House	987987	\$1,415.00	\$1,415.00	Edit Approve Archive
Nov 23, 2022	Nale Lachance	516222	\$895.00	\$895.00	Edit Approve Archive

In this view, you will have access to the following in the left-hand column

- **Dashboard:** overview of latest estimates, main screen. You may Edit, Approve (order) or Archive any of your latest quotes by using the action indicators on the right.
- **Orders:** there are three sections including Estimates, Approved and Archived. Estimates are those in-progress, Approved are orders you have sent in to process and Archived are orders you've started but filed away for later. At the top, center of the page you will see Create Estimate. You may start a new quote in this view.

COUNTERSWIFT INSTRUCTIONS

- **Customers:** Any customer information you have used previously is stored here. This makes it easy for repeat customers/contractors.
- **Resources:** ?
- **My Profile:** This is where you can update your personal information like phone number or change your password.
- **Logout:** Leave the site.

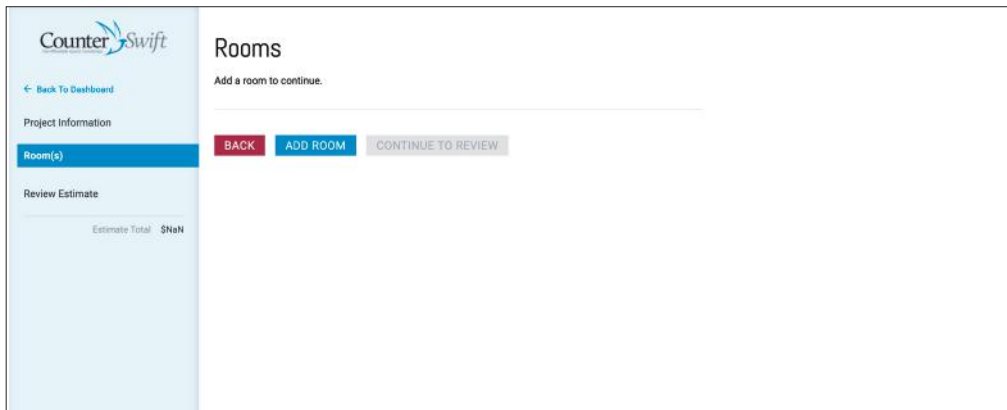
Creating an Estimate: This can be done in either your Dashboard View OR Orders View.

Click **CREATE AN ESTIMATE**

- **In this view you will see there are three sections in the left-hand column:** Project Information, Room(s) and Review Estimate.
- **Project Information:** Enter all your job details. This will prompt you to enter all customer information, allow you to choose Contractor or Homeowner (who are you providing the quote for), add multiple address's if the job site address is different than the billing, add additional jobsite contacts, and add any notes you would like us to see.

***Your Rumford Stone Project Coordinator will receive all of your orders and will read any and all details. If they have any questions, they will contact you.*

- At the bottom of the page, you will see **CONTINUE TO ADD AN AREA**
- **Rooms:** You will arrive in the Room(s) tab. You can choose to add one or multiple rooms. You will have an option to add a room later if you prefer to do one at a time. **To start click on** **ADD A ROOM**
- Enter the name of your room(s) and click OK.



- You will see your room at the top of the page. You may edit the name of your room by using the pencil icon next to the name. You may also delete the room using the delete button. Click Add Work Order underneath the room name and follow the prompts to create your piece(s). You will first select if this is a vanity or an accent piece. Next, click **CONTINUE TO DELIVERY/INSTALL**

COUNTERSWIFT INSTRUCTIONS

- This is where you will choose if you would like a Template and Install, Delivery to Jobsite or Delivery to Dealer Showroom. You will notice for vanity tops- your drawing will start to build itself on the right-hand side.

***You will not see a Template and Install option if it is not offered with the desired piece.*

- Click **CONTINUE TO QUARTZ SELECTION**

- Choose your color, you may use filters to help find your selection.

- Click **CONTINUE TO DIMENSIONS**

- Enter the dimensions of your piece. It will not allow you to enter dimensions outside of this program's offering. If you have a vanity top that has a notch or something like that, choose the template and Install option. You may also choose to add a note "Vanity has notch back left."

– Accent pieces will prompt you for thickness, edge profile, honed bottom option and corner style.

Once completed you will move directly to **CONTINUE TO REVIEW**

– For Vanity tops proceed to **CONTINUE TO SPLASHES & EDGES**

- Splash and Edge Options will vary depending on your piece.

***If you do not see the option you are looking for, you will need to quote directly through Rumford Stone.*

- Your drawing will begin to develop on the right-hand side of the screen as you move through each step.

- Click **CONTINUE TO SINKS**

- If you would like a sink cutout, select the option. It will then prompt you for sinks that fit your item. You will move through faucet configuration and then click **SAVE AND REVIEW**

- This will bring you to an overview of the work order. Once reviewed, click **REVIEW ESTIMATE**

- At the top of the Review Order page, you will see:

TEST MARKUP

Apply Discount

This is where you can adjust your Mark-Up up or down as well as Apply a Discount in dollars or percentage. The system will not allow you to mark below the cost to make the item.

- Once you are satisfied with your work order, you may Print, Save or Place the Order. Don't forget to add all desired Rooms/Work Orders for the project! You can navigate through them in the left column.

- You will receive a confirmation from Rumford Stone within 24 hours. If you need help prior to that timeframe, please contact Kristen or your Rumford Stone Project Coordinator.