Bulletin: 72-21

TO: All Greenheck Representatives

FROM: Keri Johnson, Product Manager, Digital Solutions
Sue Wirkus, Manager Customer Care Team

DATE: December 20, 2021

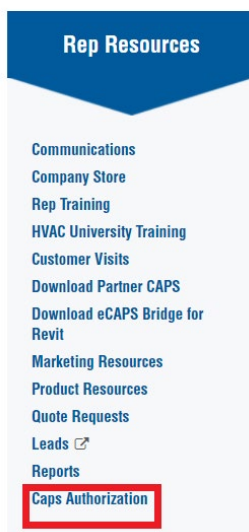SUBJECT: My Account New Feature - CAPS® Access in your Territory

We are excited to extend a new feature on My Account that allows you to see real-time site registrations by customers in your sales territory. This new area will replace the monthly emails with site registrations in your territory. This feature gives you visibility to all customer interactions in your territory and helps generate sales prospects or follow-ups for your business.

In the past, we have sent spreadsheets to a specific individual(s) at each office with any new registrations or CAPS requests and asked you to identify users who may be a competitor so we can restrict CAPS access. The new area will let specific office(s) allow or reject users in your territory access to CAPS interactively.

We will send out one last list of new customer registrations this week, then ask that you use the new page on My Account for this process.

Access this new feature by logging into your greenheck.com/My Account. Under Rep Resources, you will see a new widget titled *CAPS Authorizations*.

🏠 > My Account > Rep Resources

Rep Resources

Communications
Company Store
Rep Training
HVAC University Training
Customer Visits
Download Partner CAPS
Download eCAPS Bridge for Revit
Marketing Resources
Product Resources
Quote Requests
Leads ↗
Reports
Caps Authorization

The CAPS Authorization page contains all users in your sales territory who have registered for CAPS on greenheck.com. You can see their activity (authorized or rejected) and set their status as you see fit. You can also export the list of users for your sales and marketing efforts. **Important: any new user registration will default to 'Approved' and allow CAPS use until you explicitly 'Reject' it.** Please regularly review these new registrations in your territory.

CAPS AUTHORIZATION

Authorize and deauthorize CAPS users to ensure its available to your customers

Use this form to prevent competitors and unessential users from having access to CAPS. Below you will see a list of registered users that have been assigned to

Registration Date Range: 📅 12/16/2020 - 12/16/2021 ▾

Filter By: | Show All ▾ | **Apply** | Reset

Search Within These Results | REFINE BY 🔍

Here you can change the status from 'Authorized' (default status) to 'Rejected'.
Simply click the drop down to select the desired status and then click the 'save icon'.

AUTHORIZATION STATUS	AUTHORIZATION DATE	LAST NAME	FIRST NAME	COMPANY	CITY	STATE	PHONE	EMAIL
Authorized ▾ 💾	12/13/2021 12:28 PM (CST)				SALISBURY	Maryland		
Authorized ▾ 💾	12/13/2021 12:25 PM (CST)				OCEAN CITY	Maryland		
Authorized ▾ 💾	12/13/2021 12:16 PM (CST)				PARSONSBURG	Maryland		
Authorized ▾ 💾	12/13/2021 12:05 PM (CST)				CAMBRIDGE	Maryland		
Authorized ▾ 💾	12/13/2021 11:56 AM (CST)				WALLOPS ISLAND	Virginia		