

Steps For Rep Admin Adding a Brand-New Salesperson to Your Office

- The Rep Admin will go to Greenheck.com>My Account >Account Management > office Account Info > Create User.
- Default view by user

OFFICE ACCOUNT INFO

Manage accounts for the reps in your office.

This page is only available to you as the person responsible in your office for managing the Greenheck accounts. You are able to modify, add or remove an account, and update rep information.

CREATE USER

Filter by email, name, role, or office

Show 10 entries

◀ Previous 1 2 3 4 5 6 7 Next ▶

	EMAIL	NAME	ROLE(S)	OFFICE(S)		
+	aaronl@mechreps.com	Aaron Lee	486-Sales.485-Sales.2700-Sales.3449-General Contact	486, 485, 2700, 3449	Edit	Delete
+	alberta@mechreps.com	Albert Amaya	3313-Warehouse Manager.2700-Warehouse Manager	3313, 2700	Edit	Delete
+	amandas@mechreps.com	Amanda Steward	486-Accounting.485-Accounting.2700-Accounting	486, 485, 2700	Edit	Delete
+	andrewt@mechreps.com	Andrew Turner	485-Sales	485	Edit	Delete

- Can switch to view by office

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CREATE USER

Filter by trademark,city or office

Show 10 entries

◀ Previous 1 Next ▶

Click here to toggle between user and office view

	OFFICE(S)	TRADEMARK	CITY	STATE
+	485	Trademark	AUSTIN	Texas
+	486	Trademark	SAN ANTONIO	Texas
+	2545	Trademark	AUSTIN	Texas
+	2546	Trademark	SAN ANTONIO	Texas
+	2700	Trademark	WESLACO	Texas
+	3313	Trademark	Pharr	Texas

- To add a new user, click 'create user'

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CREATE USER

Filter by email, name, role, or office

EMAIL	NAME	ROLE(S)	OFFICE(S)
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- Fill out personal information

OFFICE MEMBERSHIP

PERSONAL INFORMATION

*Starred items signify required fields

Salutation

*First Name

First name is required

*Last Name

Last name is required

Suffix

*Email

Email is required

*Phone Number

Phone number is required

Extension

Mobile

- Select desired office you want to and the user and click 'NEXT'
 - You are only able to add an individual to one office at a time

1. Select An Office

2. Select Roles

3. Optional My Account Functions

AVAILABLE OFFICE MEMBERSHIPS	BUSINESS MAILING ADDRESS	TRADEMARK
<input checked="" type="radio"/> 2700 MECHANICAL REPS INC - 2700	3102 E BUS HWY 83 STE D WESLACO Texas USA 78596	Greenheck
<input type="radio"/> 485 MECHANICAL REPS INC - 485	2101 E SAINT ELMO RD BUILDING 3, SUITE 360 AUSTIN Texas USA 78744	Greenheck
<input type="radio"/> 486 MECHANICAL REPS INC - 486	123 Test Drive SAN ANTONIO Texas USA 78217	Greenheck
<input type="radio"/> 2545 MECHANICAL REPS INC (REP STOCK) - 2545	PO BOX 41869 AUSTIN Texas USA 78704-0032	Greenheck
<input type="radio"/> 2546 MECHANICAL REPS INC (REP STOCK) - 2546	123 Test Drive SAN ANTONIO Texas USA 78217	Greenheck

NEXT

- Select desired roles for user within selected office and click 'NEXT'

1. Select An Office **2. Select Roles** 3. Optional My Account Functions

***Role(s) Within Rep Office (Select At Least One)**
Office 2700

<input checked="" type="checkbox"/> Accounting	<input type="checkbox"/> Branch Manager	<input type="checkbox"/> Office Manager	<input type="checkbox"/> Owner/Principal	<input type="checkbox"/> Project Manager
<input type="checkbox"/> Purchasing Agent	<input checked="" type="checkbox"/> Recept/Secretary	<input type="checkbox"/> Warehouse Manager	<input type="checkbox"/> Engineer	<input type="checkbox"/> Sales
<input type="checkbox"/> Technician	<input type="checkbox"/> Marketing	<input type="checkbox"/> Estimator		

- Select additional functions (optional) and click 'NEXT'

1. Select An Office 2. Select Roles **3. Optional My Account Functions**

Optional My Account Functions
Office 2700

<input type="checkbox"/> CAPS Contact	<input type="checkbox"/> IT Contact	<input type="checkbox"/> Lead Contact	<input type="checkbox"/> Literature Contact	<input type="checkbox"/> Rep Stock Contact
<input type="checkbox"/> RepNet Admin				

- Review user selections and select a mailing address from the drop down, then click either:
 - 'SUBMIT' if individual is only needing access to one office
 - Or click 'SELECT ANOTHER OFFICE FOR THIS CONTACT' if access to multiple offices is required. Follow the same steps as above for the additional office(s)

 **REVIEW AND SUBMIT**

Please review the following office and role selections and select a mailing address for this contact:

Current selections for this contact:

Test User

2700 MECHANICAL REPS INC - 2700
3102 E BUS HWY 83 STE D WESLACO Texas USA
78596

Accounting, Recept/Secretary

Review user, office and role selections for accuracy

***MAILING ADDRESS** *Select desired mailing address for selected user from the drop down*

3102 E BUS HWY 83 STE D WESLACO Texas USA 78596

3102 E BUS HWY 83 STE D WESLACO Texas USA 78596

2101 E SAINT ELMO RD BUILDING 3, SUITE 360 AUSTIN Texas USA 78744

123 Test Drive SAN ANTONIO Texas USA 78217

PO BOX 41869 AUSTIN Texas USA 78704-0032

123 Test Drive SAN ANTONIO Texas USA 78217

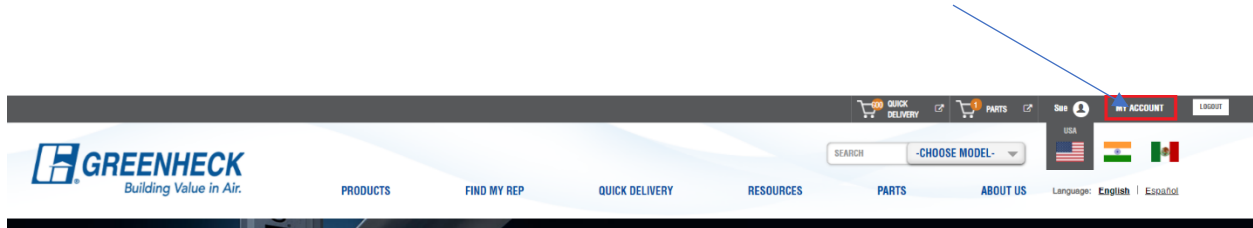
3102 E BUS HWY 83 STE D WESLACO Texas USA 78596

- The following message will appear when you are finished and click 'SUBMIT'

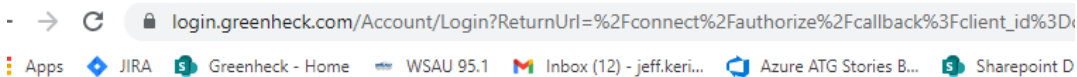
 THANK YOU FOR YOUR SELECTION
We have created this contact and added it to the office(s) you selected.

Steps for New User (Initial Login)

- Go to www.greenheck.com and click “My Account”

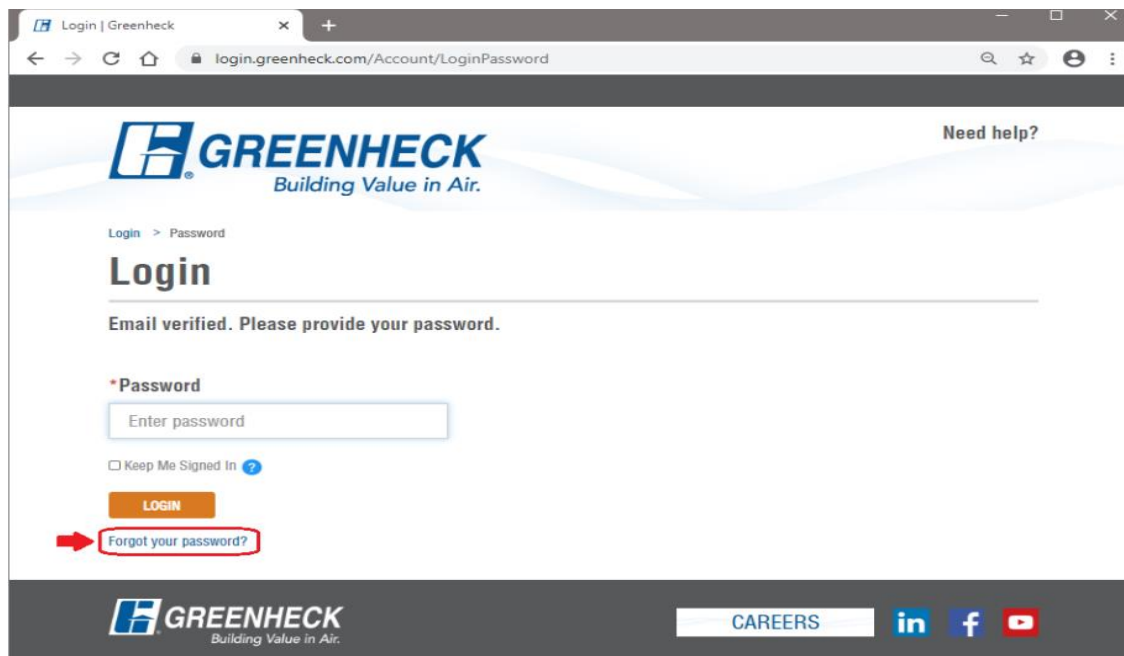


- The user will be prompted to log in, using email address.

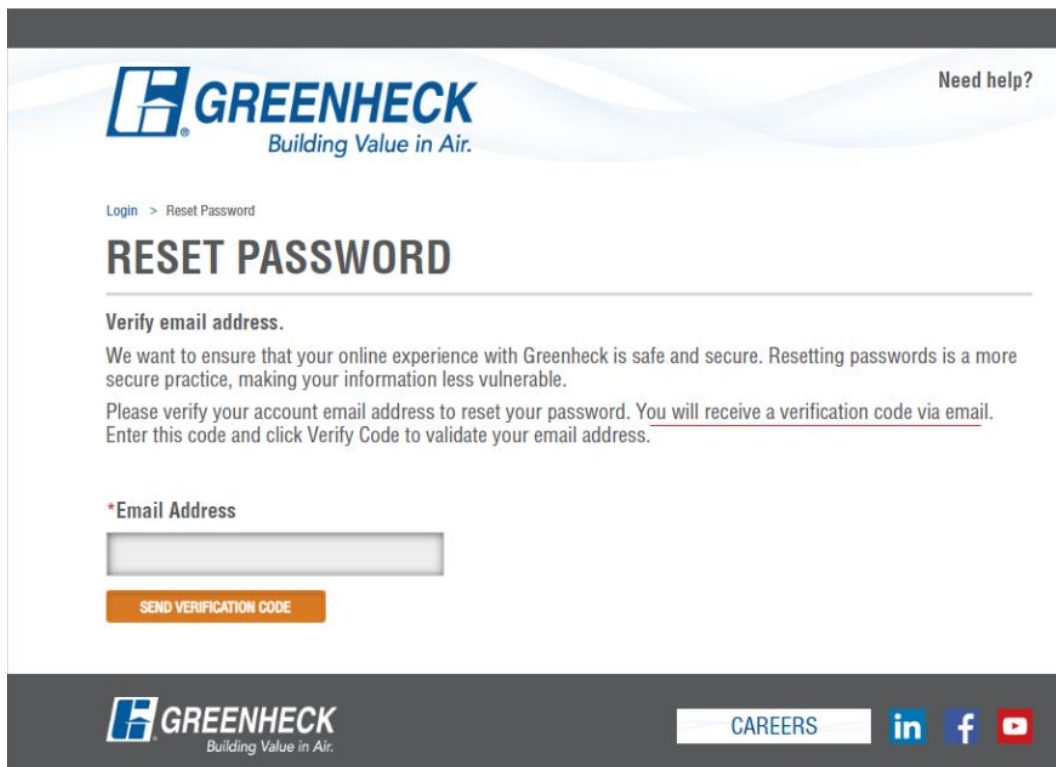
A screenshot of the Greenheck login page. The Greenheck logo is at the top. Below it, the word 'Login' is displayed in a large font. Underneath, it says 'Please log into your Greenheck account.' There is a red box around the text '*Email Address' and the input field below it. The input field contains the placeholder text 'Enter email address'. Below the input field, there is a checkbox labeled 'Keep Me Signed In' with a question mark icon. At the bottom, there is a red box around an orange 'NEXT' button and a blue link for 'Create Account'.

- User will then be prompted to set a password (Rep Admin does not create/set a password for the user) by validating email address. Confirm email address and an email with a link to set your password will be sent to your inbox.

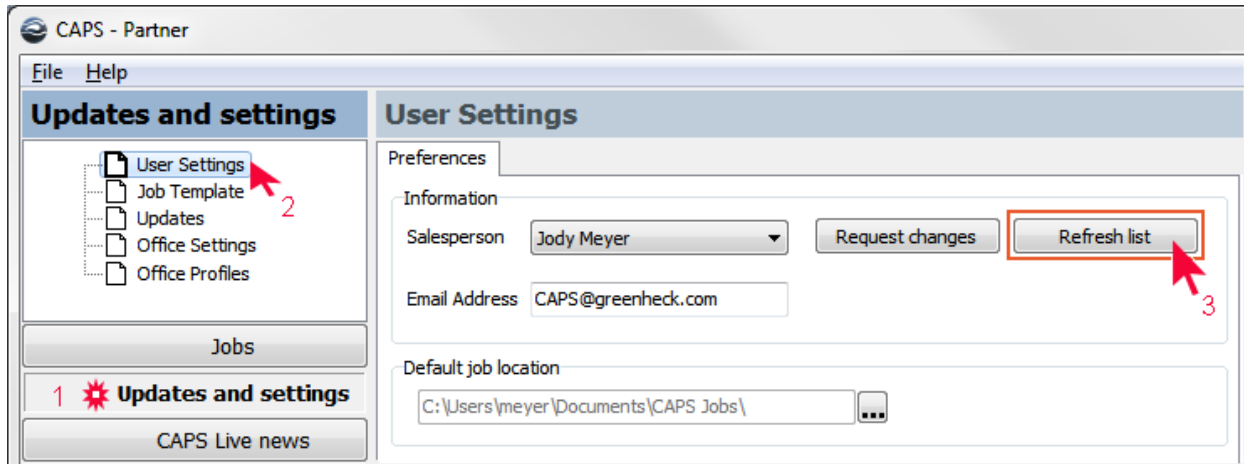
- The User is responsible for maintaining their own password – if you forget your password click “Forgot your password”.



- You will then receive the following pop-up message:



- Once the individual has logged into their account on the website, they can open CAPS and click the “Refresh List” button so CAPS can update its listing of salespeople from the website.



- If you do not receive the email link to set or reset password, please check your spam or reach out to your IT dept to ensure they do not have any spam rules that are preventing the email from being received.
 - Also make sure that the email address for the new employee is valid prior to setting up the new user or the email link will not work.
- If you have any other issues, please feel free to reach out to Sue Wirkus at sue.wirkus@greenheck.com