# Where it's at on My Account





# **Account Management**

#### Office Account Info

Create new users, modify, or delete existing users, forgot password.

#### **Policies**

Canada Change/Cancellation Guideline
Discount Policy
DOAS Service Cost Reimbursement

Policy

DOAS Specification Credit Policy

Field Problem Procedure

**Government Acts** 

**Quality Profile** 

**Rebilling Policy** 

Rep Stock Policy

Returns Policy

Show Product Samples

Specification Credit Policy

Storage and Freight Policy

TAP/DOAS Order change and

**Cancellation Policy** 

**Terms and Conditions** 

**Territory Guidelines** 

US Change/Cancellation Guidelines

Warranty

Warranty Statement for Air

**Distribution Products** 

#### **Dashboard**

Where It's At On My Account Business Unit Product Support Directory See all announcements Customize your dashboard

# **Order Management**

#### My Orders

Access to the latest info about your orders. Track, change ship to or reconsignment, cancel order.

#### My Discount Requests

Get information about your submitted discount request.

#### **Lead times**

Find out how long it will take to get the product

#### **Quick Build Counting Process**

This will help you understand when your quick build order will ship.

#### Returns

Is a return available?

#### **Inventory Search**

Search our inventory to find available products at your closest distribution center.

#### **Fire Suppression Distributors**

Find fire suppression distributors based on manufacturer.

# **Manufacturing Locations**

Find the manufacturing locationsdependent on product selection

#### **Invoices**

Search for an invoice-determine which copy you are looking for Agent/Rep or customer

# **Rep Resources**

# **Communications**

Locate the latest announcements, current and past issues of Rep Update along with Sales and Marketing bulletins.

#### **Company Store**

Shop online or stop by the store when you're in Schofield.

#### **Rep Training**

Find information on a wide range of seminars and training for all experience levels.

# **HVAC University Training**

In depth HVAC education for your customers and service technicians.

#### **Customer Visits**

Bring your customer's to Greenheck, we arrange everything you need for a successful visit.

#### **Download partner CAPS**

CAPS for partners give you pricing and the ability to order products, download drawings, find application information with detailed product and performance information.

#### **CAPS Experience Improvements**

Find information on what has changed for products and selection in our CAPS updates.

## **Download eCAPS Bridge for Revit**

Link to download eCAPS Bridge for Revit along with information and videos on use.

#### **Marketing Resources**

Information to use in selling our products, images, and presentations.

#### **Product Resources**

Find everything you need to know about Greenheck products.

## **Quote Requests**

Manage quote requests submitted by customers in your territory, update status information on orders won.

#### **CAPS Authorization**

See up to the minute site registrations by customers in your sales territory.

#### Analytics

Access to key metrics about sales orders placed by your office in real time.

# **Customer Support**

Not sure who to contact? You can utilize this area for any of the following:

#### **Business unit Support Directory**

#### **Company Directory**

# Questions on My Account feel free to reach out to:

Sue.Wirkus@greenheck.com