

My Orders – Orders Export Feature Updates

You can now include **line item details** when you export order status information. After selecting the “Export Results” button, you will be presented two export options for download:

1. **Download Summary:** Original export format
2. **Download with Line Items:** New export option that includes the line items for each shipment. Additional information includes line item, model, ordered qty., shipped qty., mark, and outbound delivery number. Example shown below.

Date Range: Show entries

Filter By:

REFINE BY

CHOOSE OPTIONS FOR DOWNLOAD

	A	B	C	D	E	F	G	H	I	J	K	L	M
1	Sold To	Sales Order (Delivery Group)	Job Name	Sales Person	Ship To	Rep PO#	Order Status	Est. Ship Date	Entered Date	Carrier	Pro or Load Number	Hold St	Notes
2	999	8152414(1)	Bldg 10	John Doe	Bldg 10	RSN1808200101	COMPLETE	11-22-2019	10-21-2019	N & M TRANSFER	108384071		
3		Line Item	Model	Ordered Qty	Shipped Qty	Mark	Shipment Details						
4		20	RBE-3L30	4,000	4,0	EFs	83536736						
5		30	VCD-23	4,000	4,0	EFs	83536736						
6	999	8152414(2)	Bldg 10	John Doe	Bldg 10	RSN1808200101	COMPLETE	11-11-2019	10-21-2019	N & M TRANSFER	108382727		
7		Line Item	Model	Ordered Qty	Shipped Qty	Mark	Shipment Details						
8		40	GPI2	4,000	4,0	EFs	83527062						

My Orders – Viewing Order Address Information

Order address information now includes the 2nd and 3rd address lines if applicable.

Entered Date:
09/23/2020

Program Type:
STD

Addresses:

- Ship-To Party
GREENHECK CORP
BRANDEON BLACK
1400 Commerce Center Dr
SHELBY, NC, 28150 US
- + Sold-To Party
- + Bill-To Party

My Account – Update Password

Need to change your password? This function is now available under My Account→Account Management→Update Password.

The screenshot shows the 'Account Management' page. At the top left, there is a breadcrumb trail: 'My Account > Account Management'. Below this is a blue header for 'Account Management' with a dropdown menu containing 'Policies' and 'Update Password'. The main content area is titled 'ACCOUNT MANAGEMENT' and includes a sub-header 'Manage accounts and learn about Greenheck policies.' followed by a paragraph: 'Managing your account has never been easier! Find all you need to edit, update and make necessary changes; then learn about our policies to understand how to do business the Greenheck way.' Below this is a 'POLICIES' section with a paragraph and a 'LEARN MORE' link. The 'UPDATE PASSWORD' section includes a paragraph and an 'UPDATE PASSWORD' link.

My Account – Your Regional Customer Care Contact

Your US or Canada customer care regional contact information is now available on the My Account page for quick reference.

The screenshot shows the 'My Account' page. On the left is a navigation menu with 'My Account' at the top, followed by 'Account Management', 'Order Management', 'Rep Resources', and 'Customer Support'. Below this menu is a red-bordered box containing 'Regional Customer Care Contact' with the following details: 'North', '(800) 333-8867', and 'North.Canada.sales@greenheck.com'. The main content area is titled 'ANNOUNCEMENTS' and features a carousel of two items: 'Fan, Damper and Louver Fundamentals Virtual Training' and 'All Things Greenheck - Webinar'. Below the announcements are three sections: 'MY ORDERS' with a box icon, 'LEAD TIMES' with a clock icon, and 'COMPANY STORE' with a t-shirt icon.

My Account – New Dashboard Widgets!

Based on requests from rep partners, we have included new options in the widget library that you can add to your dashboard:

- **Parts:** Opens the Parts site to place parts orders
- **Inventory Search:** Navigates you to the Inventory Search page

To add a widget to your dashboard, click on “Customize” above the dashboard, then “Add Widget”. Select the desired widget from the listing by selecting “Add to Dashboard”.

Once all changes are complete, click “Done Customizing” to reset your dashboard with your new changes.

