

How to Add a New Salesperson

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
- 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

	EMAIL	NAME	ROLE(S)	OFFICE(S)		
+	a61@gmail.com	aa test	1344-Branch Manager,Receipt/Secretary,Lead Contact,660-Receipt/Secretary,Branch Manager	1344, 660	Edit	Delete
+	aa11bbcc@greenheck.com	aa test	1344-Owner/Principal,Engineer,Sales,Branch Manager,IT Contact,Lead Contact	1344	Edit	Delete
+	aa1234@greenheck.com	Brian test1	1344-Branch Manager,Literature Contact,Receipt/Secretary	1344	Edit	Delete

- Can switch to view by office – click to toggle between user and office view.

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

	EMAIL	NAME
+	a61@gmail.com	aa test
+	aa11bbcc@greenheck.com	aa test

- To add a new user, click 'Create 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

- 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

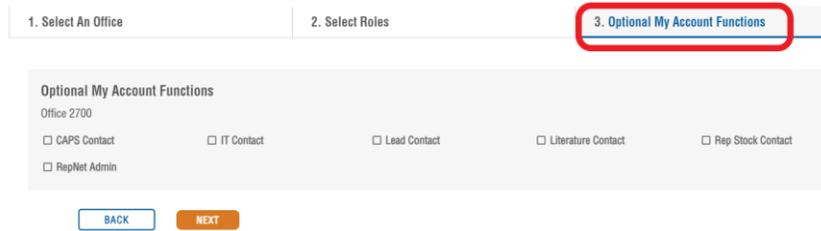
***Role(s) Within Rep Office (Select At Least One)**

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"/> Receipt/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		

BACK
NEXT

- 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

CAPS Contact IT Contact Lead Contact Literature Contact Rep Stock Contact

RepNet Admin

BACK **NEXT**

- 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,Receipt/Secretary

DELETE

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

SUBMIT

SELECT ANOTHER OFFICE FOR THIS CONTACT

- 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.

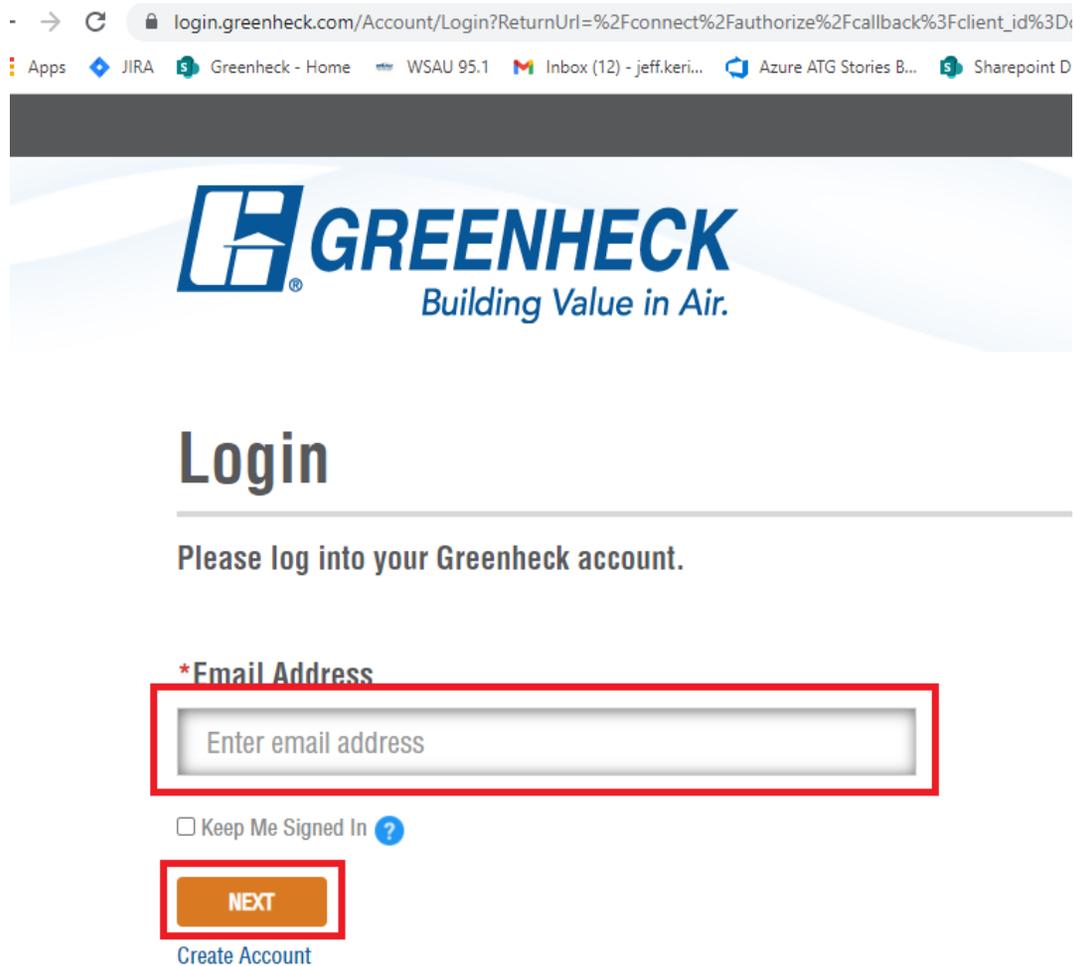
OK

Steps for New User (Initial Login)

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

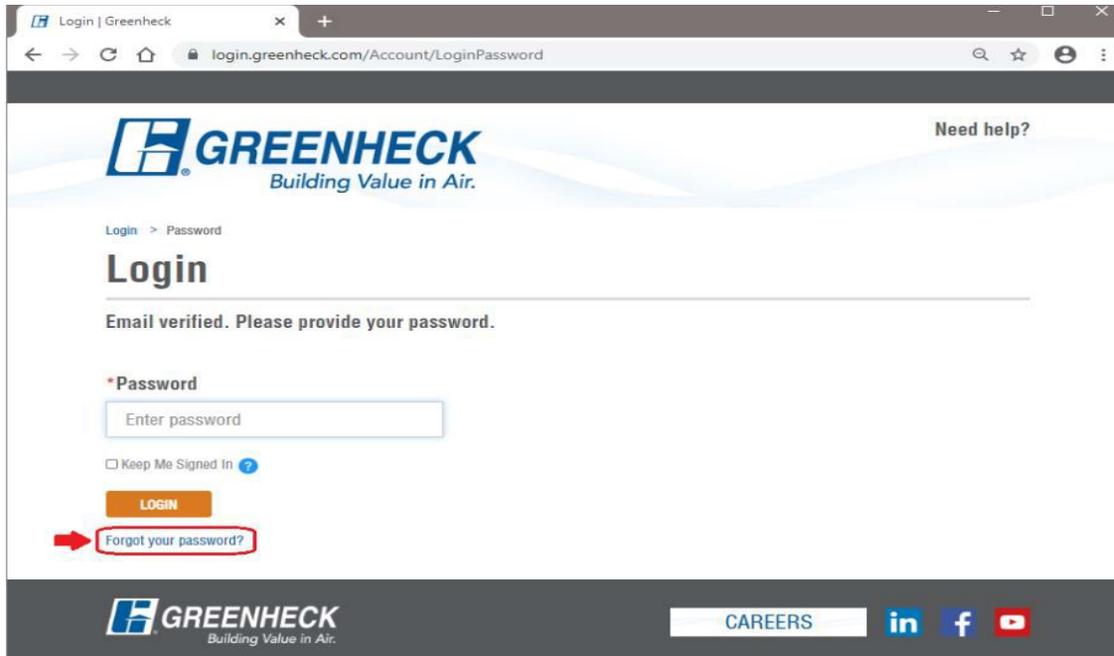


- The user will be prompted to log in, using email address.

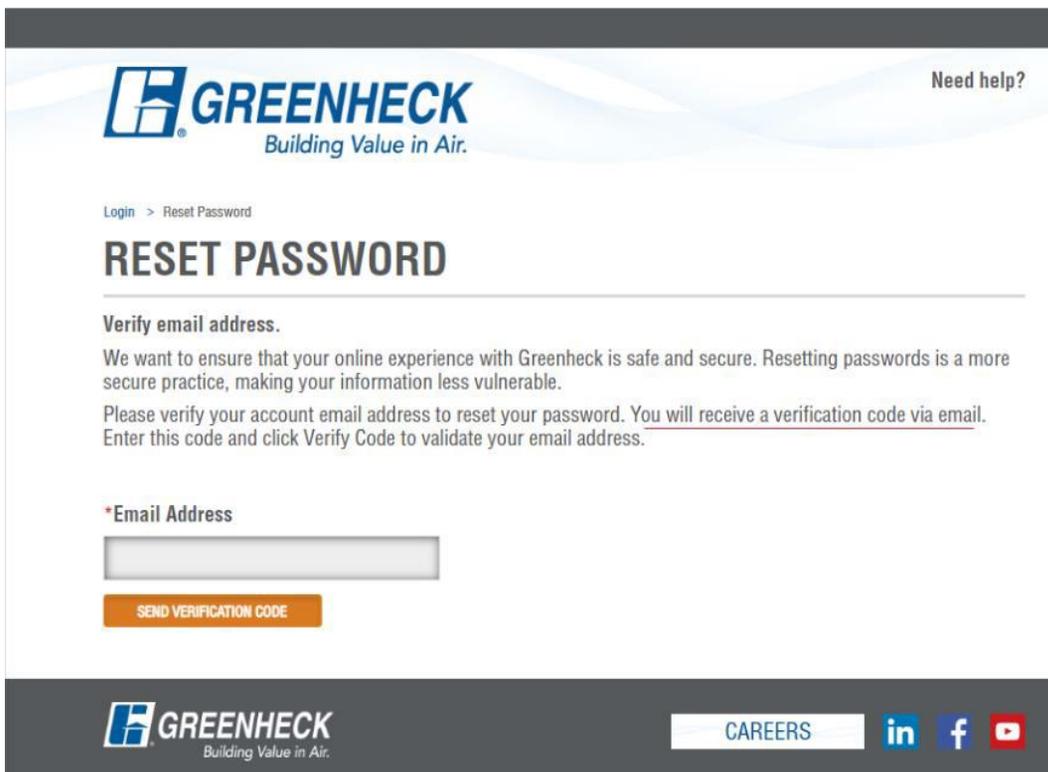


- User will then be prompted to set a password by validating the email address. (Rep Admin does not create/set a password for the user). Confirm email address and an email with a link to set your password will be sent to your inbox.

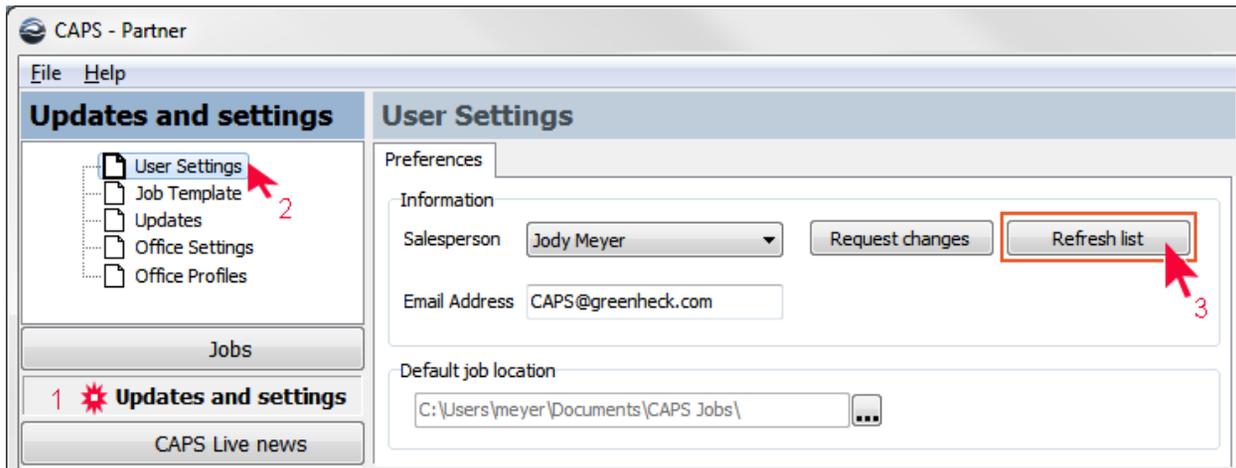
- The User is responsible for maintaining their own password.
If you forget your password, click: "Forgot your password?"



- 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 don't 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 Heather Olivotti (Heather.Olivotti@Greenheck.com), Samantha Gardella (Samantha.Gardella@Greenheck.com) or Elizabeth Steinke (Elizabeth.Steinke@Greenheck.com).