

BULLETIN

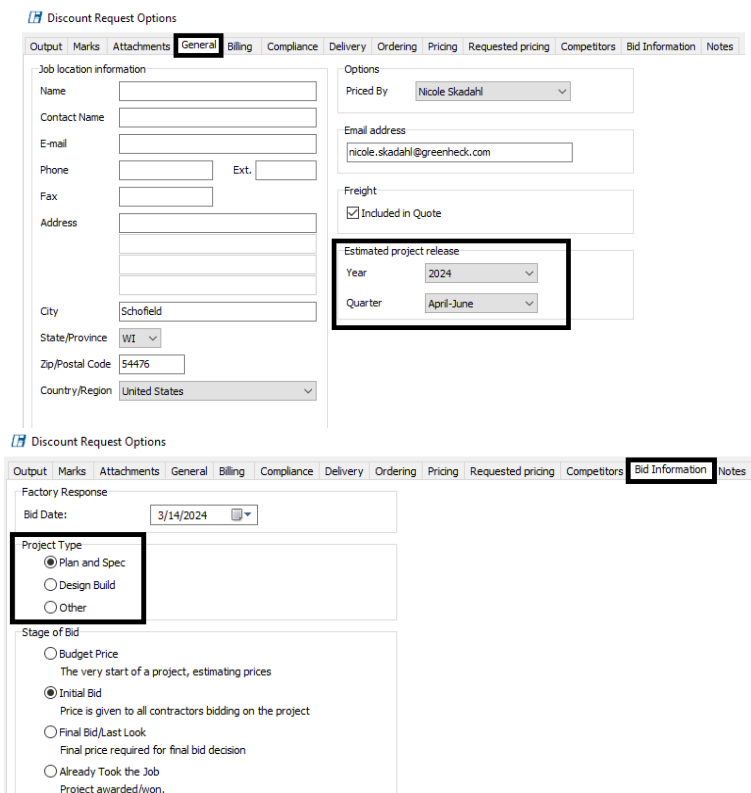
MARCH 18, 2024 | BULLETIN 13-24

TO: All Greenheck US and Canada Representatives
FROM: Tori Wood
Manager, Sales Operations
SUBJECT: Discount Request CAPS® Changes



In the April CAPS® 4.44 release, we will be asking you, our rep partners, to help us capture critical project information when submitting a discount request through CAPS. These changes will provide greater insight into the timing of project releases and the types of projects being quoted. With this information, we will be able to forecast, plan plant capacity, and understand the different job dynamics based on project type more accurately. Please note that with this change, discounts will now default to an expiration date of 60 days from authorization.

Beginning in April 2024, we will ask users submitting a discount request in CAPS to provide the following:
Estimated Project Release Year/Quarter and Project Type.



The image shows two screenshots of the CAPS software interface. The top screenshot displays the 'Discount Request Options' form with the 'General' tab selected. The 'Job location information' section includes fields for Name, Contact Name, E-mail, Phone, Fax, and Address. The 'Options' section includes 'Priced By' (Nicole Skadahl), 'Email address' (nicole.skadahl@greenheck.com), and 'Freight' (Included in Quote). The 'Estimated project release' section is highlighted with a black box, showing 'Year' set to 2024 and 'Quarter' set to April-June. The bottom screenshot shows the 'Bid Information' tab selected. The 'Factory Response' section includes 'Bid Date' (3/14/2024) and 'Project Type' (Plan and Spec selected). The 'Stage of Bid' section includes options like 'Budget Price', 'Initial Bid', 'Final Bid/Last Look', and 'Already Took the Job'.



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The more accurate data we receive, the better armed we will be in our ability to help you secure projects. Accurate data makes us more successful, together.

Please continue to bring us opportunities and thank you for your sales efforts. We are here to help you close orders and continue to grow our businesses together.

If you have any questions, please reach out to your Customer Care Quote Specialist or Regional Sales Manager.