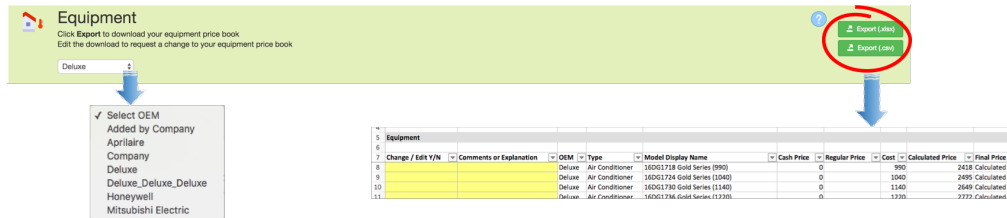## Management Portal Basics

Equipment

The largest part of your build is the equipment that is selected on the option tabs. To simplify your life, we take care of the efficiency specs, consumer brochures and warranty information for you. If you need changes made simply export the equipment worksheet, indicate what needs to be changed and submit to the Document Portal. Your Customer Success Specialist will update the app for you.

Accessories and Add-Ons

Accessories are generally the items that are enhancements to an HVAC system. Items such as : Thermostats, Air Cleaners, and Humidifiers.

Accessories may include:

- Thermostats
- Air Cleaners
- Air Purifiers and Air Filters
- Humidifiers

- Zone Controls
- Dampers
- Specialty sensors
- Dehumidifiers

Add-Ons, also known as Additional Services, are services that you offer. Common Add-Ons are maintenance agreements, duct cleaning services, or other non-HVAC products that you carry.
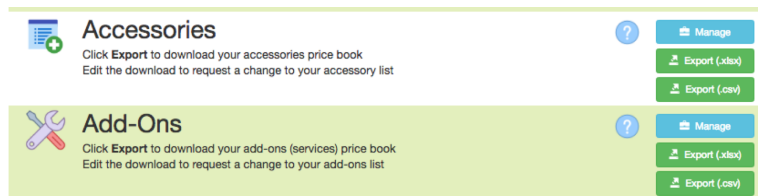
- Service Plan
- Extended Term Warranty
- Duct Work

- Electrical Service
- Water Heater
- Installation Type

- Duct Cleaning

- Insulation

- Equipment Kits - Termination, Vent, LP, Return, Sound, Power Entry
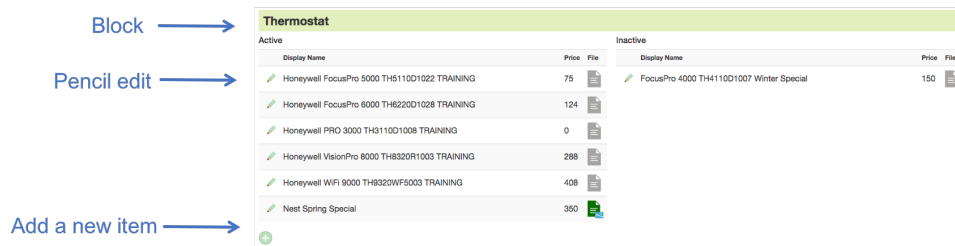
- Specialty Service

We preload the most commonly used accessory and service types for you. We recommend that contractors limit the number of accessories and additional services used in the app. Keep it simple for your sales team, pre-load your best-selling accessories and the most commonly used services. Accessories and Services that are infrequently used can be added at the kitchen table during the sales call.

You can easily add accessories and services to these sections in the management Portal. If you would like us to preload your accessories and services while we build your app, submit a list of accessories and services to the document portal during the app set-up.

If you would like to Add, Remove and/or Update an accessory or Add-On use the Manage Button.

- To add a new item select the Green plus sign.
- Use the pencil edit to change the Display Name, pricing and to inactivate or activate an item.

Financing

We all know how frequently **Financing Programs** change. The portal allows quick and easy adjustments to your Financing Programs. We can customize these programs for you during your build. Just submit the financing programs to the document portal.

- Select the pencil to edit an item.

- Edit the Program Name, Payment Label, Term or Payment Factor %, and Dealer Fees

Pricing

Pricing adjustments can be made as needed and activated immediately. No waiting for us to change your pricing. You're in charge! We set up basic pricing rules to get you started.

Visit the pricing topics to learn more about pricing.