



Managing Your Accessory List Using the Management Portal

The management portal makes it easy to **Add**, **Remove**, and **Update** accessories as your business needs change.



Accessories

Manage
Export (.xlsx)
Export (.csv)

Click **Export** to download your accessories price book
 Edit the download to request a change to your accessory list

Thermostat	Block Name				
Active	Inactive				
Display Name	Price	File	Display Name	Price	File
5-2 Programmable	0				
E3 WIFI Stat	355				
E3 WIFI Stat w/ 2 Sensors	459				
iComfort WIFI Stat	309				
NEST	350				

To view your materials list, click the blue **Manage** button in the Accessories Section of the Management portal.

Your accessory list will be pre-populated with common equipment 'blocks,' which divide your accessory list into categories, and make it easy to browse long lists of accessories in the app.

All of the accessories listed under the **Active** header will appear in the app, and all of the accessories listed under the **Inactive** header will be hidden.

Si WIFI Stat

Manage
Export (.xlsx)
Export (.csv)

+

Humidifier

Add
✕

Display Name

Cost

Cash Price

Regular Price

Active

✕ Cancel

To **add** an accessory, select the green plus sign at the bottom of the list.

You will need a customer-friendly **Display Name** for your item and the **Cash Price**, at a minimum. The **Cost** and **Regular Price** fields are optional.

Tip: Often, contractors charge different prices for accessories depending on whether or not the customer has purchased a system. If you would like to list a higher 'standalone' price, you can use the **Regular Price** field to do that.

When you are finished, click Save, and 2 additional sections, File and Thumbnail, will appear.

You can use the File section to upload a brochure for your equipment, and the thumbnail section to upload a thumbnail for your brochure.

To determine whether an add-on has a brochure loaded, you can use the file icons on the right side of each line item.

If the icon is **Gray**, it means that this is an accessory that the IMS team has loaded, and the brochure has already been loaded.

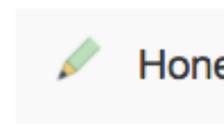
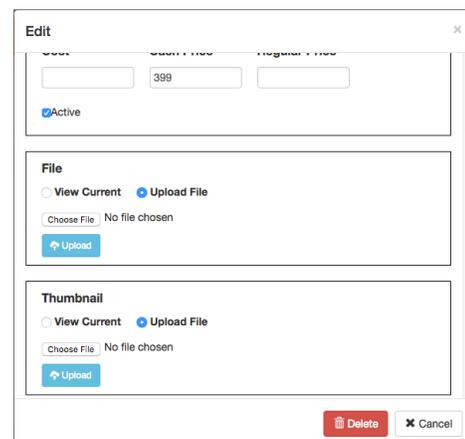
If the icon is **Green**, it means that you have successfully loaded the brochure.

If the icon is **Red**, it means that the brochure has not been loaded yet.



To **deactivate** or **remove** an accessory, simply uncheck the Active checkbox.

To **edit** the name, price, or cost of an Accessory, select the **pencil** icon for that line item. You can also add a brochure if you have one.



Accessories FAQ

Can I send you a list of my Accessories?

Yes! While you are in the initial setup period of your app build, you can upload a spreadsheet containing the Display Name, Equipment Type, Cost and Cash Price of your Accessories. After your app is live, you can manage your accessories directly in the Management Portal.

What is the difference between Accessories and Add-Ons?

Generally, we think of Accessories to be items that you buy from a distributor that help enhance an HVAC system, but are not furnaces or air conditioners.

Add-Ons, also known as Add-On Services, are services that you offer. Common Add-Ons are maintenance agreements, duct cleaning services, or other non-HVAC products that you carry.

I would like to add a different brochure to my accessory, but the icon is gray. How can I change the brochure?

Because our brochures link to a master database that multiple customers use, we can't edit the brochure for existing accessories. However, you are able to delete or de-activate that accessory from your build, and re-add it with your desired brochure.

I still have questions about my accessory list!

No problem! Please feel free to contact your Customer Success Specialist by email, and we'd be glad to walk you through the process.