Uploading Documents Using the Management Portal

The management portal makes it easy to **Upload** important documents for your Customer Success Specialist to review and process.

Documents
Click **View & Submit** to see status and upload documents
- **Priority #1:** Upload your equipment distributor price book(s)

⬇ View & Submit

When you upload a document directly to the management portal, a task is generated in our project management system that provides visibility and traceability to your updates.

To upload documents and view previously submitted documents, click the blue **View & Submit** button in the
Documents Section of the Management portal.
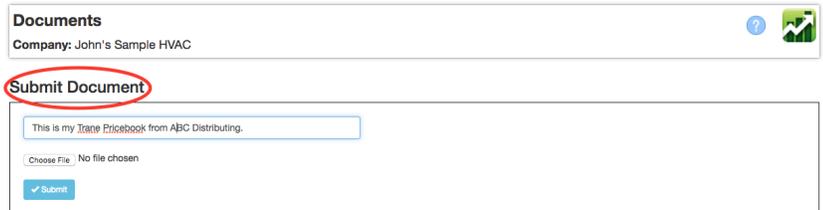
Documents
Company: John's Sample HVAC

Submit Document

This is my Trane Pricebook from ABC Distributing.

Choose File   No file chosen

✔ Submit

Document History

To submit a new document, use the **Submit Document** section.

First, enter the text description. You can enter any description you would like to further clarify the purpose of the
document submission. If you are
uploading a price book, for example, it would be helpful for us to know the OEM and distributor.

Then, select **Choose File**, and select the file from your computer.

Finally, click the **Submit** button to send the chosen file to us.

If you or your Customer Success Specialist have submitted documents previously, you can download and view them under **Document History**.

Document Submission FAQ

What information do I need to include in my price book submission?

At a minimum, we need the OEM, Equipment type, Model Number, Model Name, and Cost.

Here's an example of the columns we need:

OEM	Equipment Type	Model Number	Model Display Name	Cost
Deluxe	Air Conditioner	16DG1718	16DG1718 Gold Series	1414

What document types are supported?

For distributor price books, we strongly recommend that they are in Excel format (.xls, .xlsx). This cuts down on our processing time considerably. If your distributor is reluctant to supply you with an Excel copy of your price book, let us get in touch with them. Often, distributors are glad to help us, because Sales Builder Pro allows you to sell more of their equipment in less time.

Where should I upload PDFs and photos that I would like to be added to my Sales Presentation?

We have a new Presentation section in the management portal that allows you to easily upload, arrange and manage all of your presentation content.

I still have questions about submitting documents!

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