Managing Your Material List Using the Management Portal

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

Materials
Click **Manage** to View, Organize, Add, Remove, or Price materials
Click **Export** to download your materials list

- Manage
- Export (.xlsx)
- Export (.csv)

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

Active

		Description	Price	Cost	Unit(s)
		Complete AC Install Kit	$0.00	$0.00	
		Complete Heat Pump Instal Kit	$0.00	$0.00	
		Complete Gas Furnace Install Kit	$0.00	$0.00	
		Complete Air Handler Install Kit	$0.00	$0.00	

		Description	Price	Cost	Unit(s)
		Line Set	$0.00	$0.00	
		Outdoor Pad for AC or Heat Pump	$0.00	$0.00	
		Cable (whip) to connect the outdoor unit to electrical power.	$0.00	$0.00	
		Outdoor electrical disconnect box	$0.00	$0.00	

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

Inactive

		Description	Price	Cost	Unit(s)
		Boiler shut off valve	$125.00	$30.00	

To **add** a material, select the green plus sign at the bottom of the list.

You will need a **description**, **price**, and **unit** for your item. For example, if you are charging by the square foot, you should select 'sq ft' from the Unit(s) dropdown menu.

The cost field is optional, and it is not added in to the customer's job price.

	Complete Gas Furnace Install Kit	$0.00	$0.00
	Complete Air Handler Install Kit	$0.00	$0.00

Note: items on the materials tab will not have financing programs applied to them, so for larger job additions, you should use the **Accessories** or **Add-On** tabs.

To **deactivate** or **remove** a material, 'grab' the line item by the blue arrow icon, and **drag** it down to the Inactive section. You can also use the blue arrow icon to re-order materials within the Active list, to help you sort them in a logical way for your workflow.

Add Material ✕

Description:

Sample Material 1

Price:	**Cost:**	**Unit(s):**
1.00		sq ft

+ Add   **✕ Cancel**

After making any change to the order or status of a material, a **Save** button will appear on the right hand side, and you will need to save your change before making another change. To **cancel** your change, simply **refresh** the page.

Save

	Price	Cost	Unit(s)
	$0.00	$0.00	
	$0.00	$0.00	

To

	Description	Price	Cost	Unit(s)
	Complete AC Install Kit	$0.00	$0.00	

edit the name, price, or cost of a material, select the **pencil** icon for that line item.

If you are charging the customer for your materials, be sure to notate the **Price**, because the Cost field does not add to the job total. Price field is added to the quote.

Note: Your price should include margin, tax and labor. Pricing Rules do not affect the final price of materials.

You can also edit the Unit, for items that are calculated by feet, pounds, or hours, for example.

Edit Material ✕

Description:

Complete AC Install Kit

Price:	**Cost:**	**Unit(s):**
0.00	0.00	✓

ft
hrs
lbs
oz
qty
sq ft

Last Update: 07/21/17 2:14 PM by IMS Sale

✓ Save   **✕ Cancel**

Materials FAQ

I use the same materials every time for certain types of jobs. Is there a way to build those costs in to the price?

Yes! Our Pricing Rules section will allow you to add an Install Kit for each equipment type that you have in your price book, and you can set the price so that every job will include the cost of those materials. For more instructions, visit the Pricing Rules section of the Management Portal.

I still have questions about my materials 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.