



Managing Your Add-On List Using the Management Portal

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

 **Add-Ons**
Click Export to download your add-ons (services) price book
 Edit the download to request a change to your add-ons list

 Manage
 Export (Link)
 Export (CSV)

Duct Work <small>Block Name</small>					
Active			Inactive		
Display Name	Price	File	Display Name	Price	File
 Return	450				
 Setup	2000				
 Supply	375				

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

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

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

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

 Si WiFi Stat



Humidifier

Add ✕

Display Name

Cost Cash Price Regular Price

Active

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 add-ons 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.

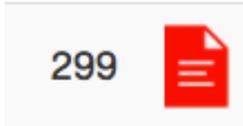
You can use the File section to upload a brochure for your add-on, and the thumbnail section to upload a thumbnail for your brochure.



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

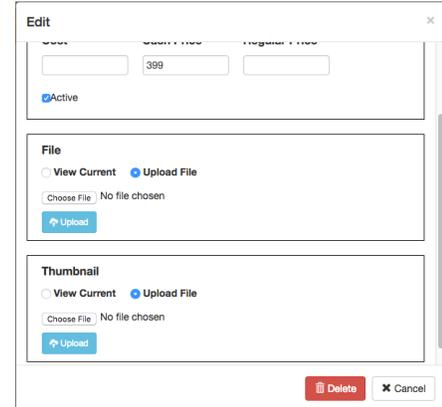


If the icon is **Gray**, it means that this is an add-on that the IMS team has loaded, and the brochure has already been loaded.

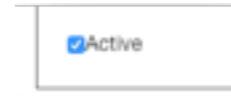


If the icon is **Green**, it means that you have successfully loaded the brochure.

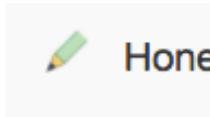
If the icon is **Red**, it means that the brochure has not been loaded yet.



To **deactivate** or **remove** an add-on, simply uncheck the Active checkbox.



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



Add-Ons FAQ

Can I send you a list of my Add-Ons?

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 Add-Ons. After your app is live, you can manage your add-ons 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 add-on, 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 add-ons. However, you are able to delete or de-activate that add-on from your build, and re-add it with your desired brochure.

I still have questions about my add-on 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.