



Accessing Your Equipment Using the Management Portal

The management portal makes it easy to view a list of all equipment, accessories, and add-on services that have been loaded into Sales Builder Pro.



Equipment

Click **Export** to download your equipment price book
Edit the download to request a change to your equipment price book

Export (.xlsx)
Export (.csv)

To export a list of your equipment, click one of the Export buttons on the right side of the Equipment section.

To download a list of all equipment across all brands, you can ignore the **Select OEM** dropdown. If you'd like to filter your list down to only one brand, you can use that dropdown to narrow your list before exporting.

If you have Excel installed on your computer, we strongly recommend using the **.xlsx** format, because it contains some extra formatting that makes the spreadsheet easier to read. Otherwise, you can select the **.csv** format.

To request a deletion from your pricebook, enter Y (for yes) in the yellow cell in Column A next to the line item you would like to delete, and then enter "Please delete this model, discontinued" in the yellow cell in Column B.

	A	B	C	D	E	F	G	H	I	J
1	Price Book	Johns								
2	Date	07/26/2017								
3	Time	1:17 PM								
4										
5	Equipment									
6										
7	Change / Edit Y/N	Comments or Explanation	OEM	Type	Model Display Name	Cash Price	Regular Price	Cost	Calculated Price	Final Price
8	Y	Please delete this model, discontinued	Deluxe	Air Conditioner	16DG1718 Gold Series	0		1414	4600	Calculated
9			Deluxe	Air Conditioner	16DG1724 Gold Series	0		1489	4757	Calculated
10			Deluxe	Air Conditioner	16DG1730 Gold Series	0		1628	5049	Calculated
11			Deluxe	Air Conditioner	16DG1736 Gold Series	0		1742	5289	Calculated
12			Deluxe	Air Conditioner	16DG1742 Gold Series	0		1868	5553	Calculated
13			Deluxe	Air Conditioner	16DG1748 Gold Series	0		2057	5950	Calculated
14			Deluxe	Air Conditioner	16DG1750 Gold Series	0		2473	6936	Calculated

To request an addition to your pricebook, scroll all the way to the bottom of the list, and enter Y (for yes) in Column A of the first empty row. Then, complete the **OEM**, **Type**, **Model Display Name**, and **Cost** columns for the new model. You can leave the other columns blank.

If you edit the Model Display Name, Cash Price, or Cost fields, please be sure to highlight those rows, so that we can find the updates.

Tip: In order for our team to efficiently find your changes, please do not delete any rows in this spreadsheet.

Once you've made your changes to your equipment list, save the workbook on your computer, and then upload it to the **Documents** section of the Management Portal.

Your Customer Success Specialist will be notified that a new document has been uploaded, and will notify you when the change has been made.

Change / Edit Y/N	Comments or Explanation	OEM	Type	Model Display Name	Cash Price	Regular Price	Cost	Calculated Price	Final Price
		Deluxe	Heat Pump	16DG1748HP Gold Series	0		2057	4950	Calculated
		Deluxe	Heat Pump	16DP1948HP Platinum Series	0		3066	7069	Calculated
		Deluxe	Heat Pump	16DS1648HP Silver Series	0		2284	5427	Calculated
Y	Please add this new model.	Deluxe	Gas Furnace	16DS1652160 Silver Series	0		782		

Equipment FAQ

I have multiple line items to add, or my OEM has released a new series or model, how can I add them to my equipment list?

If you have new equipment or many line items to add, you may find it easier to upload the new models in Excel format to the Documents section of the Management Portal. We'll need the OEM, Equipment Type, Model Number, and Cost columns to process the sheet. You can use the upload description to let us know you are adding a new series or model.

I still have questions about my equipment 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.