Managing Customer Plans

As a Hydrawise contractor, you have a few options for assisting customers with their plans. The three options include **Assigning a Plan**, **Assigning Available Plans** you have in your contractor account, and **Purchasing a Plan** for the customer. These options include adding a plan to your own contractor account.

Steps

1. Click on the **MULTI-SITE MANAGER** on the upper right-hand side of the app. Click on the icon if navigating on the web browser.
2. Click **MY CUSTOMERS.**
3. Under your customer list, select a **CUSTOMER NAME. NOTE:** The top customer name in your customer list will be **YOUR ACCOUNT NAME**. You can assign one of your Enthusiast plans to your personal account if desired.
4. Under the **PLANS** menu, you have three options when clicking the + button.
   - Assign Plan Using Code
   - Assign Available Plan
   - Purchase Customer Plan

Add Plan Using Code

If you've purchased a plan card from a retailer with a code on the back, or if they've given you the plan code, you can use this to assign the plan for your customer. The plan code is four characters followed by a dash and another four characters (for example, 45F2-644E).

1. Select **ADD PLAN USING CODE.**
2. Enter **UPGRADE KEY.**
3. Click **UPGRADE.**

Assign Available Plan

If you've purchased plans online or you want to use the included plans with your Contractor Plan, they are available for you to assign to new or existing customers.

1. Select **ASSIGN AVAILABLE PLAN.**
2. Available plans will be listed. Choose the plan and click **ADD PLAN** to assign it to a

customer.

For the contractor on a Contractor, Bronze, Silver, or Gold plan, Enthusiast (Advanced Homeowner Plan) plans are included.

Contractor Plan	Included Enthusiast Plans
Contractor	2 Plans
Bronze	12 Plans
Silver	20 Plans
Gold	35 Plans

Purchase Customer Plan

1. Select **PURCHASE PLAN.**
2. Choose the plan you want to purchase and select whether you'd like it to be automatically renewed.
3. Click **UPGRADE WITH PAYPAL** to pay for a plan. Learn more [1]