



It's Hard To Stop A Trane.

©2024 TRANE. ALL RIGHTS RESERVED.

CS-5055-17

TRANE® COMFORT SPECIALIST DEALER PROGRAM

A COMPLETE GUIDE TO BENEFIT OPTIONS
2024



TRANE
TECHNOLOGIES



Contents

WELCOME, TCS DEALERS!	4
BENEFITS LIST.....	5
 GROWTH BENEFITS	
ONLINE REPUTATION MANAGEMENT.....	6
LEAD GENERATION.....	8
FIELD SERVICE MANAGEMENT / CUSTOMER RELATIONSHIP MANAGMENT.....	9
HIGH EFFICIENCY SPIFF.....	11
BUSINESS ACCELERATOR.....	12
CONSUMER FINANCING.....	13
DO WHAT'S RIGHT.....	14
SALES PRESENTATION SYSTEM.....	15
EXTENDED LABOR WARRANTY.....	16
 ANCILLARY BENEFITS	
TCS CONFERENCE.....	17
NATIONAL CONSUMER PROMOTION.....	18
WARRANTY PRODUCT EXCHANGE.....	18
SERVICE MANAGEMENT.....	19
MOBILE DISCOUNTS.....	20
HR & ACCOUNTING SOFTWARE DISCOUNTS.....	20
VEHICLE DISCOUNTS.....	21
LOCAL PRESENCE MANAGEMENT.....	23
E-LEARNING.....	25
EMPLOYEE RETENTION.....	27
PARTS CONCESSION.....	28
EMPLOYEE RECRUITMENT.....	28
 CONTACTS	
	29

Welcome, Trane Comfort Specialist Dealers!

For the Trane® Comfort Specialist™ (TCS) Program, we choose to partner with dealers who share our commitment to providing the best customer experience and offer special program benefits designed to accelerate Trane's leading dealers' growth and overall success. It is this partnership that allows us all to be recognized as America's Most Reliable and Most Trusted HVAC Brand.¹



EFFECTIVE PERIOD

JANUARY 1, 2024 - DECEMBER 31, 2024

**SELECT
DEALERS**

have the option to choose up to

2

BENEFITS

**PREMIER
DEALERS**

have the option to choose up to

6

BENEFITS

**PRIME
DEALERS**

have the option to choose up to

4

BENEFITS

¹ Trane Technologies Marketing Insights. Trane Brand Consumer Survey. September 2023.

GROWTH BENEFITS

The TCS program offers main growth benefits that are meant to encourage a dealer’s business growth. The number of benefits you get to pick is based on the level chosen. Refer to the three program commitment levels on the previous page to see how many benefits you have the option of choosing.



Online Reputation



Lead Generation



Field Service Management



SPIFF



Business Accelerator



Consumer Financing



Do What’s Right



Sales Presentation System



Extended Labor Warranty

ANCILLARY BENEFITS

The TCS program also offers additional ancillary benefits that are available to all TCS dealers—regardless of your program commitment level.



Online Reputation Management & Customer Interaction



Powered by Podium

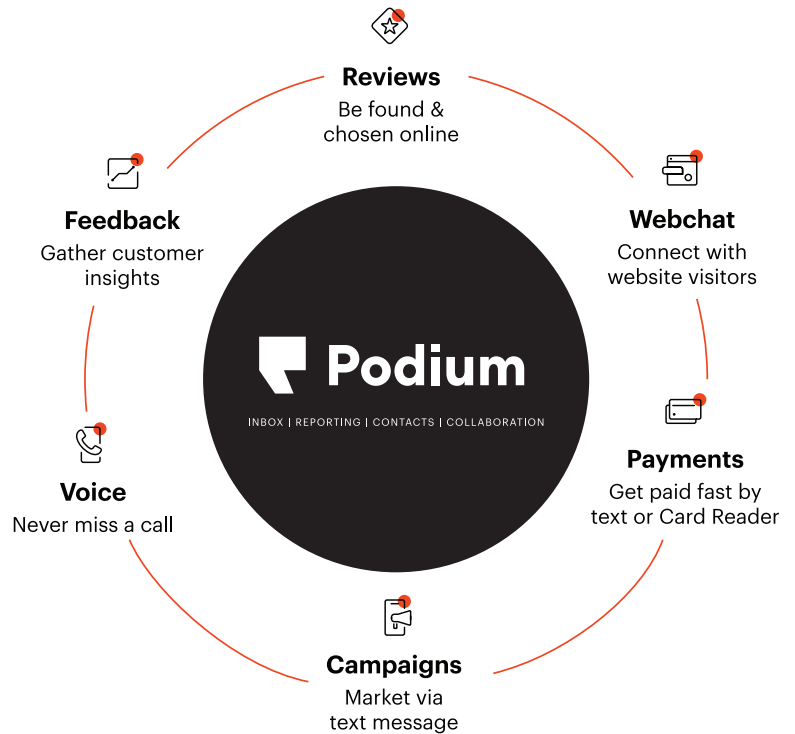
THE BENEFIT

Podium is a communication and payments platform that uses the simple power of texting and other messaging channels to help local businesses grow their bottom line. It's the easiest and most effective way to get more online reviews, convert more website traffic, collect payments, and send targeted promotions. The platform has grown to include Webchat, Feedback, Teamchat, Campaigns, and Payments—every essential business interaction powered by messaging.

1 Growth Benefit: Trane will provide a 1-year license for Podium's Professional Package for unlimited users at the dealership (~\$7,188 USD value). This package includes the following features: Reviews, Webchat, Feedback, Inbox Pro, Bulk Messaging Pro (500 Subscribers), AI Review Response, AI Recommended Replies, and payments. This package covers one dealer location (additional fees apply for additional locations). The 1-year period begins when the dealer signs the Podium agreement.

ABOUT

From acquisition to retention, Podium helps you to interact with your customers more seamlessly and generate Google reviews more effectively. Their single platform centralizes messaging from multiple channels, so that separate interactions become an ongoing conversation, and your business can quickly become a saved contact they can text or video chat. Podium products include review management, webchat, automated lead interaction, team chat, video chat, payment processing and more.





Get found and chosen online.

Build an online review presence that drives new leads and helps your business to stand out from the competition.



Build lasting relationships.

Don't just transact. Start conversations with your customers to build deep relationships that keep them coming back again and again.



Consolidate tools and work more efficiently.

Podium makes it easy to manage and scale customer interactions, improve efficiency across sales and service, and reduce point solutions.

HOW TO GET STARTED

- 1 Dealer chooses the Podium benefit during enrollment
- 2 Podium reaches out to dealer with link to sign up
- 3 Podium will discuss everything included in the 1 year license and how to get started
- 4 Dealer signs their 1 year agreement with Podium
- 5 Podium will conduct on-boarding

PACKAGE

PODIUM CORE

Unlimited users for 1 location
 Reviews
 Feedback
 Inbox
 Payments (2.49% +30)**

PLUS: Webchat

PLUS: SMS Campaigns

PLUS: Video Chat

FEATURES

Integration
 Automation
 Templates

SUPPORT

Live Chat Support
 Help Center Guides
PLUS: Phone Support

DETAILS

Trane Educational Webinars
 Strategic Payment Rate
PLUS: Dedicated CSM
PLUS: Personalized On-boarding
PLUS: Marketing Support

**Payment rates are not locked in and are subject to change. These rates assume card not present.



Lead Generation

Powered by SearchKings & Mediagistic

Looking for a home services partner that specializes in marketing and advertising campaigns? The lead generation partners are designed to help elevate your business and generate leads.

1 Growth Benefit: Trane will provide a \$3,500 USD credit to your SearchKings or Mediagistic account that can be used for digital advertising and any associated management fees for one location.

OR

2 Growth Benefits: Trane will provide a \$6,000 USD total credit to your SearchKings or Mediagistic account that can be used for digital advertising and any associated management fees for one location.

SearchKings:

SearchKings helps home service businesses get qualified leads for service and installation jobs. We invite you to build a customized plan designed to promote your business and generate leads. With over 100 employees dedicated to search engine marketing, SearchKings is one of North America's largest Google Premier and Microsoft Elite partners.

Available services: Call Intelligence to evaluate leads from any call source, pay-per-click advertising, Local Services Ads, Google Shopping ads, hiring campaigns, video campaigns, and website development.

NEW for 2024: SearchKings Call Intelligence technology scores all incoming calls and identifies the most profitable opportunities. This allows you to accurately measure your return on investment and focus on the leads and opportunities that matter.

NEW for 2024: Leverage the power of Google Shopping and generate leads for equipment sales by targeting qualified buyers at the top of the search engine results page.

Mediagistic: **NEW for 2024!**

Mediagistic is your premier home services marketing partner, specializing in marketing and advertising campaigns designed to grow your business. With more than 20 years of experience in the industry and 100+ employees to serve you, Mediagistic is one of the top-performing Google Premier Partners serving the HVAC space.

What You Should Know: We specialize in Google Paid Search and GLSA campaigns with conversion-optimized landing pages designed to produce high click-through rates and leads for your business.

Bottom Line: In addition to the Elite Options to help stimulate leads for your business, Mediagistic can support your marketing efforts end-to-end as an extension of your marketing team. Click here to watch a short video on [our consultative approach to HVAC marketing](#).

Field Service Management / Customer Relationship Management



Powered By: ServiceTitan, Payzer, Aptora, FieldEdge, ServiceFusion, Jobber, P3, Housecall Pro

THE BENEFIT

Trane will provide a \$2,000 USD credit to help offset the costs of one of the eight FSM/CRM providers listed.

THE BENEFIT: DOUBLE DOWN

The FSM/CRM benefit can be selected twice as part of the dealer’s benefit selection for a total of \$4,000 USD credit.

ABOUT

Want to grow revenue or simply run a more profitable business? Transform your business by partnering with a premier FSM/CRM company that can help you to more efficiently manage customer relationships, scheduling, dispatch, service, sales, marketing, inventory, payroll, agreements, accounting, and more. Learn about each of the Field Service Management/ Customer Relationship Management providers below.

#1 Payzer



Payzer is the all-in-one Field Management software created to help contractors get to more jobs, sell more equipment, and service more customers. And now, Trane is making implementing software easier than ever before.

Get to more jobs

- ✔ Simple scheduling & dispatching
- ✔ Automatic customer notifications
- ✔ Contact-less invoicing & payment processing

Close more jobs

- ✔ Mobile proposal tool
- ✔ On-site financing including Wells Fargo
- ✔ Sell & manager maintenance plans

Why do contractors prefer Payzerware?

- ✔ 5-star Rated Customer Support
- ✔ Free on-boarding & unlimited training
- ✔ Data conversion at no cost

#2 Aptora



True all-in-one HVAC software solution. No 3rd party integration or plugins required. Combine your accounting, certified payroll, scheduling, dispatching, service agreements, customer equipment mobile field management, field service management, and more into one program. Backed by 25+ years of experience delivering HVAC industry leading software solutions.

#3 FieldEdge



FieldEdge is a top service management software to run your entire home service company. It combines a deep 40-year history with the latest technology to create a powerful yet easy to use system. Accessible from anywhere and updated in real-time, FieldEdge gives everyone on your team the information they need to succeed.

#4 Housecall Pro



Housecall Pro is a top-rated business solution that helps home service professionals save time, sell bigger jobs, and provide best-in-class service. With easy-to-use tools for scheduling, dispatching, payments, and more, Housecall Pro enables Pros to manage every aspect of their business all in one place. The software is available through a mobile app and web portal for Pros across the United States and Canada.



#5 Service Fusion

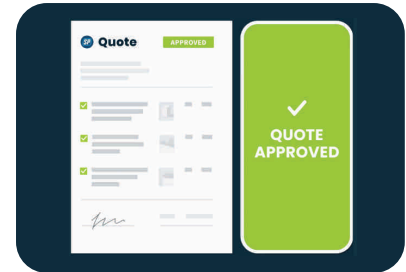
Service Fusion is a simple, affordable software built to help service contractors grow their businesses. ServiceFusion gives service contractors one centralized system for customer management, scheduling, invoicing, create automated payment reminders for customers, payments, reporting, and more.

- **SCHEDULE & DISPATCH**
- **GPS FLEET TRACKING**
- **CUSTOMER MANAGEMENT**
- **INVOICE & PAYMENTS**
- **JOBS & ESTIMATES**
- **WIN REPEAT CUSTOMERS**
- **INCREASE VISIBILITY**
- **INCREASE REVENUE**
- **REDUCE COST**
- **AUTOMATE OPERATIONS**



#6 Jobber

You can count on Jobber to keep your business organized. Manage your business and back-and-forth with customers from one place. Estimate, quote, schedule, invoice, get paid—no software experience required. Over 100,000 home service pros in 50+ industries trust Jobber.



#7 P3 HVAC

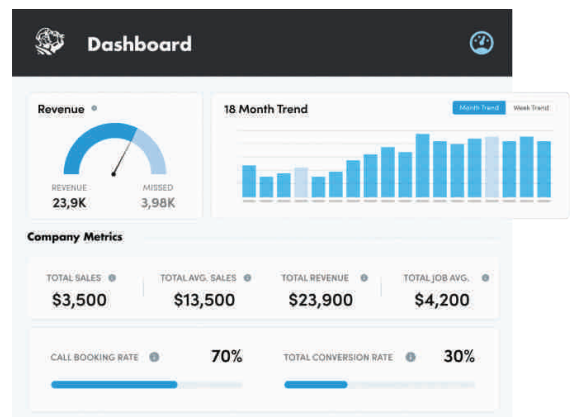
Grow your profits, improve customer service, simplify your business, and save time and money. Trane Comfort Specialists get up to \$2,000 or 50% off. Trane contractors get up to \$500 off!

#8 ServiceTitan



ServiceTitan is a top business software built specifically for home and commercial service businesses. More than 100,000 HVAC, plumbing, electrical, water treatment, garage door, and chimney sweep professionals trust ServiceTitan to streamline operations, elevate customer service, and book bigger, better jobs. Improve sales. Supercharge your team. Manage your business easily.

- **SCHEDULING**
- **DISPATCH**
- **ACCOUNTING**
- **REPORTING**
- **INVENTORY**
- **AGREEMENTS**
- **SALES**
- **MARKETING**
- **PAYROLL**
- **PAYMENTS**
- **EQUIPMENT**
- **CUSTOMER SERVICE**



High-Efficiency SPIFF



Sales Incentive powered by Trane

THE BENEFIT

To encourage the sale of high-efficiency Trane residential equipment, a registered dealer salesperson will earn up to \$150* USD for each qualifying outdoor or indoor unit sold. Supplemental rebates may be available outside of promotional periods. Trane’s high-efficiency products generate greater homeowner satisfaction and higher revenue for the participating dealership, which makes this benefit a great tool for growing businesses and sales professionals!

REQUIREMENTS

- ✔ **Equipment must be purchased using standard pricing from distributor and for retail replacement applications only; quoted equipment purchases do not qualify for the SPIFF program.**
- ✔ **Dealership submits SPIFF claims with homeowner invoices online via Trane Dealer Rewards (bulk claim submissions by a dealer administrator are allowed).**
- ✔ **Incentive funds are loaded onto a reloadable VISA Rewards Card for quick payment.**
- ✔ **Sales incentives are taxable income, and the owner of card will receive 1099.**
- ✔ **All claims must be made within 90 days and are not retroactive from enrollment into the 2024 TCS program.**
- ✔ **Only Qualifying Equipment as defined in this Sales Plan is eligible for the SPIFF incentive. All offers are based on product availability. No substitutions or exceptions will be granted.**

MBU INCENTIVES: QUALIFYING EQUIPMENT

Product Category: Outdoor Units	USA (\$USD)
4TTV0, 4TWV0	\$150
4TWL9	\$125
4TTV8, 4TWV8	\$100
4TTX8, 4TWX8 4TTX7, 4TWX7	\$75
4TTR7, 4TWR7 4TTR6, 4TWR6	\$50
Product Category: Indoor Units	
TAMX, TAM9, TEM8, TUHM, TDHM, TUDC, TDDC, S8V2, S9V2, S9V2VS	\$75
TUD2-V, TDD2-V, POV0*, L8V1*, L8X1*, L9X1*, TUD2, TDD2, L8X1P*	\$50
Product Category: Packaged Units	
4DCZ6, 4WCZ6, 4YCZ6 4DCZ5, 4WCZ5, 4YCZ5, 4YCL4*	\$100

**Only available in California, USA*

ASK YOURSELF:

- ❓ How are you attracting and retaining sales professionals?
- ❓ What value do you place on rewarding strong sales performance?
- ❓ How are you incentivizing sales of higher efficiency equipment

2023 RESULTS

TCS dealer sales professionals received an average of \$7,176 USD in sales incentives with the SPIFF program.

**See 2024 TCS Sustainability High-Efficiency SPIFF Sales Plan for full details of qualifying equipment, rebate amounts, and claims process.*

Business Accelerator



Powered by EGIA Contractor University

ABOUT

The HVAC industry's most powerful training platform is now available through the Business Accelerator program powered by EGIA Contractor University! Select this program as one of your 2024 growth benefits to unlock:

- ➔ The largest online database of training tools and resources (videos, downloadable implementation tools, etc.) around every facet of running a successful HVAC business in today's marketplace
- ➔ A comprehensive business evaluation with a customized training road map for your company
- ➔ Monthly one-on-one business coaching sessions
- ➔ 24/7 Ask-the-Experts online Q&A support (Your specific questions answered by the industry's most renowned business consultants)
- ➔ In-depth online & LIVE training classes for your employees (In-Home Sales, Technician Communication, Customer Service, Mindset, Performance & Productivity and more)

THE BENEFIT

With the Business Accelerator program powered by EGIA Contractor University, you will be able to tap into decades worth of knowledge and expertise from some of the HVAC industry's most successful business leaders who have walked in your same shoes and found proven solutions to many of the business challenges that are currently keeping you up at night.

Additionally, let the EGIA Contractor's University platform take the burden off your shoulders to have to continuously find training and employee development solutions for your staff. With this program, you'll simply assign your team members with access to the platform and EGIA Contractor University will take care of the rest, while providing you with complete access and visibility to monitor their progress along the way. It's that simple.

Once you select this benefit during enrollment, you will be contacted by EGIA Contractor University for a thorough walk-through and onboarding.

PLUS MEMBERSHIP

Access to All Online
On-Demand Training Tools

Monthly One-on-One
Coaching

24/7 Ask the Experts
Q&A Support

Business Evaluation & Customized
Training Roadmap

DEALER COST AS BENEFIT SELECTION: FREE

(Standard Rate is \$3,767 USD annually)

(Until the End of 2024)

**PLEASE NOTE: If Contractor University will be required to work with different points of contacts at separate branches/satellite offices/locations for your company and/or if your employee training data will need to be segmented/grouped by each different branch separately, separate membership payment would be required for each additional branch requiring this level of service.*



Consumer Financing*

Year-long buy-down, powered by Wells Fargo

THE BENEFIT

Offer financing to your customers for all Trane equipment. No caps on financed amounts. No additional claims necessary.

Growth benefit dealer rate adjustments are shown in the graphic below.

Trane will buy down competitive financing promotional rates for ALL Trane equipment. Take advantage of no caps on financed amounts, a no claim funding process, and no restrictions on systems, components, or models sold through the program. The current Wells Fargo Price sheet can be found within the Financial Center on ComfortSite.



HOW TO GET STARTED

- 1 Choose the Wells Fargo benefit during enrollment.
- 2 Complete the Wells Fargo Electronic Dealer Enrollment Kit in ComfortSite®. [ComfortSite](#) > [Financial Center](#) > [Consumer Financing](#) > [Enroll Now](#)
- 3 If approved, you will be authorized to use exclusive plan codes at adjusted dealer rates per the current price sheet.

**This benefit is available to USA dealers only*

Do What's Right



Warranty product exchanges and charitable opportunities, powered by Trane

THE BENEFIT

The purpose of this benefit is to support the TCS dealer with additional flexibility and autonomy to “Do What’s Right” for the customer. By choosing this benefit, the dealer will have the ability to replace a specified number of units during the year, to be used in the following situations:

1 . WARRANTY PRODUCT EXCHANGES

When a warranty product issue cannot be resolved through the existing “First 90 days Major Failure Exchange” policy or a standard repair. Replacement must take place during warranty period and is limited to like-for-like equipment, including of Trane and RunTru™ outdoor splits, packaged units, furnaces and air handler. Excludes 3 phase products.

2. CHARITABLE OPPORTUNITIES

When an opportunity exists to serve the local community, a dealer can use this benefit to provide an equipment donation to a charitable organization or person in need.

NEW for 2024: All approved DWR claims are eligible for a 2-year extended labor warranty powered by JB Warranties.

QUALIFYING EQUIPMENT FOR CHARITABLE OPPORTUNITIES

Model Family	Product Category
Outdoor Units	4TTR5, 4TWR5, 4TTR4, 4TWR4, 4TTR3, A4AC3, A4AC4, A4AC5, A4HP4, A4HP5, 5TTR5, 5TWR5, 5TTR4, 5TWR4, 5TTR3, A5AC3, A5AC4, A5AC5, A5HP4, A5HP5
Package Units	4WCC4, 4YCC4, 4TCC4, 4WHC4, 4TCA4, 4WCA4, 4YCL4
Furnaces	S9B1, S8B1, S9X1, S8X1, S9X2, S8X2, A801X, A951X
Air Handler Units	TEM6, TEM4, TMM4, TMM5, A4AH4, A4AH5, A4AH6, POV0, STEM6, STEM4, STMM4, STMM5, A5AHC, A5AHV
Coils	4PXA, 4PXC, 5PXC

**SELECT
DEALERS**

1

MBU PER YEAR

**PREMIER
DEALERS**

5

MBU PER YEAR

**PRIME
DEALERS**

3

MBU PER YEAR

ADDITIONAL GUIDELINES:

- The benefit cannot be used for personal use or training purposes. - Equipment claimed through the DWR process CANNOT be resold to homeowner. - Trane (or IWD Partner) Invoice and Customer Invoice will be required for submission. - Claims will be submitted and tracked through the MAX portal and will require distributor approval. - All claims must be submitted within 90 days of Trane invoice date (or IWD Partner invoice date) or by December 15, 2024, whichever comes first. Ask your distributor for claims process.

*Please note that the “First 90 days Major Failure Exchange” policy is separate from “Do What’s Right” and does not count against the dealer’s allotted number of units below.

Sales Presentation System



Powered by Pricebook Digital

PricebookPlus™ is the premier digital sales/sales presentation system for HVAC Comfort Advisors. PricebookPlus™ handles all aspects of the sales process, from lead management to sales presentation/closing to installation support, and it allows you to configure a complete, customized multi-option equipment/systems presentation for homeowners in minutes. A turnkey solution powered by Pricebook DataSource™, our comprehensive industry database for equipment, system matchups, pricing and more, including everything Trane-related - PricebookPlus™ will take your sales to the next level.

NOTES & EXCLUSIONS

> Third-party accessories and equipment integral to the functioning of Trane, Trane-Mitsubishi, and RunTru systems, such as third-party thermostats/controls, third-party coils, etc. are included at no additional cost to the dealer.

> Equipment brands limited to Trane, Trane-Mitsubishi and RunTru. The addition of a separate major brand of third-party equipment is excluded from the benefit, but may be purchased directly from Pricebook Digital at additional cost. Examples - the addition of a line of geothermal equipment, a line of boilers, etc.

> Note that additional user licenses and other add-on products and services may be purchased directly from Pricebook Digital at an additional cost.

- ➔ Dealers Currently Using PricebookPlus - 12 month service subscription (1/1/2024 through 12/31/2024). 1 TCS benefit selection - retail value \$3,300 USD. Includes all Trane, Trane-Mitsubishi, RunTru brands, and 2 user licenses.
- ➔ Or, dealers new to PricebookPlus - Onboarding and Setup, plus 6 month service subscription. 1 TCS benefit selection - retail value \$4,200 USD. Includes all Trane, Trane-Mitsubishi, RunTru, and 2 user licenses.
- ➔ Or, dealers new to PricebookPlus - Alternate Selection - Onboarding and Setup, plus 12 month service subscription (or through 12/31/2024) - retail value up to \$5,773 USD. **2 TCS benefit selections.** Includes all Trane, Trane-Mitsubishi, RunTru, and 2 user licenses.



Extended Labor Warranty

Powered by JB Warranties

NEW for 2024!

JB Warranties offers one of the best warranty programs in the HVAC/R and Plumbing Industries. For the length of the extended service contract, your customers are protected against unexpected repair costs. The extended warranty plans cover labor costs for mechanical failures. Use this benefit to provide your customers with peace of mind and increase the value of your business. The parent company is eligible for this benefit.

1 Growth Benefit: Trane will provide a \$3,500 credit to your JB Warranties account that can be used for extended labor warranties.

Or

2 Growth Benefits: Trane will provide a \$7,000 total credit to your JB Warranties account that can be used for extended labor warranties.

Notes & Exclusions:

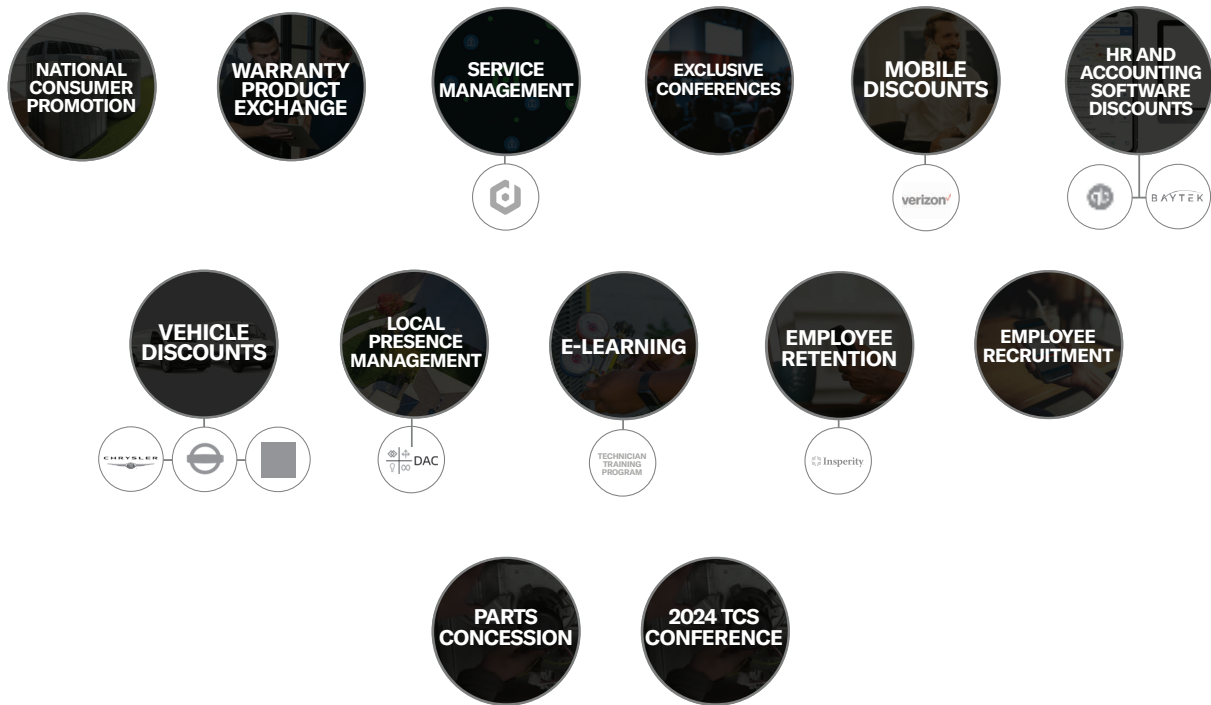
**Equipment brands limited to Trane. The addition of a separate major brand of third-party equipment is excluded from the benefit.*

**Dealers in Quebec are not eligible for this benefit*



ANCILLARY BENEFITS

The TCS program also offers additional ancillary benefits that are available to all TCS dealers—regardless of your program commitment level.



2024 TCS Conference

Powered by Trane



As a loyal Trane Dealer, you will be invited to Trane’s TCS Conference. When invitations are sent, availability will be limited and on a first-come first-serve basis. The parent company is eligible for this benefit.

TCS Premier dealers will be allowed 2 attendees (with a guest for each)

TCS Prime dealers will be allowed 1 attendee (with a guest)

TCS Select dealers will be allowed 1 attendee (with a guest)



National
Consumer
Promotion

National Consumer Promotion

Powered by Trane

ABOUT

All TCS dealers will be eligible to participate in specific sales incentives offers throughout the year. These could range from consumer promotions to sweepstakes. Complete information and requirements will be made available throughout the year.



Warranty Product Exchange

First 90 Days

Powered by Trane

Warranty
Product
Exchange

ABOUT

TCS dealers have the authority to replace outdoor split/package units, furnaces and air handlers when faced with major system leaks, compressor or heat exchanger failures due to manufacturing defects within the first 90 days after installation/startup date.

- 1.1. Request Equipment Exchange through local FSR
- 1.2. No labor or refrigerant allowed
- 1.3. First 90 days post installation/start-up date
 - 1.3.1. Cooling equipment start-up date is April 1st for cold weather cooling installations
 - 1.3.2. Heating equipment start-up date is October 1st for hot weather heating installations
- 1.4. Unless otherwise instructed by the FSR, failed units can be scrapped by the dealer
- 1.5. Compressor failure is defined as: will not pump due to an electrical or mechanical failure

**Applies only to Residential Equipment (5 ton and under)

**DOES NOT INCLUDE: 3-PHASE EQUIPMENT, RUNTRU PRODUCTS OR TRANE®/MITSUBISHI PRODUCTS.



Service Management

Powered by Dispatch

ABOUT

Dispatch is a suite of field service tools to streamline your business and delight your customers. Dealers utilize Dispatch to disposition leads from the Trane dealer locator. Dispatch also allows dealers to organize leads, book and schedule appointments, dispatch techs and communicate to customers via text (\$3,000 USD value).

More than just lead distribution - Dispatch is the only Trane partner that gives you one tool to manage your entire business.

- ➔ Best-in-class Customer Experience
- ➔ Dispatching and scheduling
- ➔ A powerful mobile toolset
- ➔ Messaging between you, Trane, and your customers
- ➔ Technician tracking
- ➔ Customer booking page
- ➔ Call masking
- ➔ QuickBooks integration
- ➔ Performance reporting
- ➔ Reputation management
- ➔ Free onboarding and support



MORE SALES

Put your best foot forward with better scheduling and a modern customer experience



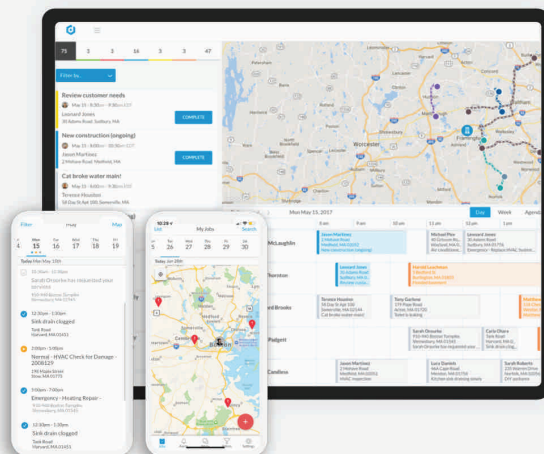
LESS TIME

Automatically receive leads and update status for your jobs in one place



BETTER REPUTATION

Increase reviews and build out your local business pages with our reputation management features



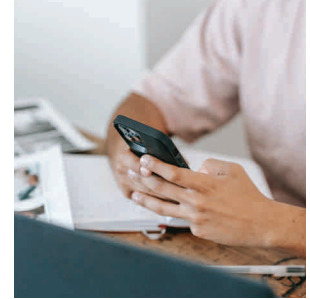


Exclusive Mobile Device & Service Discounts*

Simple and reliable connectivity for your business, powered by Verizon Wireless.

You already know that mobile devices are essential for doing business. But you may not be aware that Verizon Wireless can give you greater access to more innovative technology solutions, which utilize the same great devices we offer you today. Solutions like One Talk gives your business a **mobile-first, cloud-based phone system that unifies and streamlines communications across your distributed locations**. Let us help you transform your business processes, control costs, improve collaboration and deliver a powerful customer experience! Verizon also offers our TCS dealers Verizon LTE Business Internet.

**This benefit is available to USA dealers only*



Discounts on Quickbooks and HR Basic

By JB Dealer Services



JB Dealer Services is a Marketplace for HVAC dealers featuring leading business management software solutions QuickBooks, HR Basic, ZoomPhone and other back-office products, and services. QuickBooks - Get tools to help your small and mid-sized business thrive through our partners at Baytek LLC, a top QuickBooks Solution Provider with Intuit. Exclusive savings and rebates for new QuickBooks Enterprise, QuickBooks Online Advanced, and more. Already own a QuickBooks product and wondering about savings? Complete the form at baytek.com/trane-qb to see if there are special discounts available for your existing product.

HR Basic - An affordable, on-demand HR manager service for any HVAC dealer that does not have a professionally trained HR manager on staff. On a monthly basis, you will receive unlimited access to SHRM-certified HR professionals, 3 free background checks and much more! HR Basic helps you maintain peace of mind and mitigate risks, all for just \$50/month or \$540/annual subscription (\$60 savings versus monthly plan). To order HR Basic, visit myhr-concierge.com/trane-hr.

ZoomPhone – The secure and reliable modern cloud phone system for HVAC companies with staff in the office and comfort advisors and techs in the field. ZoomPhone is the leading, single platform for video, voice, chat and meetings at a very affordable price. To request a demo and special pricing quote, visit jbw.co/zoomphone/trane.

QUICKBOOKS

ABOUT

Accounting Software for Your HVAC Business Trane has partnered with Baytek, an Elite QuickBooks Solution Provider, to provide Trane dealers with QuickBooks special VIP pricing, up to 50% off of MSRP's. To request more information and receive a special VIP price quote, please visit baytek.com/trane-qb.

Desktop Enterprise Gold Subscription Details

The all-in-one business solution for you.

- ✓ Includes payroll
- ✓ Customizable for you industry
- ✓ Thousands of advanced reports
- ✓ Can scale up to 30 users
- ✓ 24/7 premium care





Vehicle/Fleet Discounts*

Trane Comfort Specialist dealers have access to vehicle discounts through exclusive purchasing programs that have been established with Chrysler, General Motors, and Nissan. Below is some information about each manufacturer's offer. Plans and associated discounts can be found on the Elite Dealer Microsite, located in the Marketing Center on ComfortSite.



Chrysler: TCS Exclusive Discounts

BENEFITS

- ✔ **Access to FCAUSFleet.com** offers a variety of information, including Vehicle Configurator, service and parts information, ability to track your orders, payment status and re-marketing information, to name a few.
- ✔ **Support from our Fleet Information Center:** Email FLCenter@fcagroup.com or call 1-800-999-3533 to check availability of Fleet-only options, confirm purchases, and verify build-out dates, request product literature, and more.
- ✔ **Unprecedented level of product knowledge and service provided by our fleet-dedicated staff.**
- ✔ **Access to ServiceNet:** A single-source centralized service and maintenance billing network that helps save your company time and money.

HOW TO ORDER

To ensure proper payment and to facilitate order tracking and preferential scheduling, your orders must include your assigned Fleet Account Number (FAN), 009U2 for Trane Comfort Specialist dealers.

**This benefit is available to USA dealers only*

REPORTING PROCEDURE

To ensure timely and proper payment of your VIP incentive, it is imperative the sale be accurately reported with the following information on the New Vehicle Delivery Receipt (NVDR).

1. TYPE OF SALE (TYPE SALE 3 OR 5)

- Type 3- Commercial Sale
- Type 5- Fleet Lease

2. FLEET ACCOUNT NUMBER

3. PROGRAM I.D. NUMBER

- 37ARF (2024 Model Year Units)
- 37APF (2023 Model Year Units)
- 37ANF (2022 Model Year Units)

Note: Non-compliant sales reporting will result in applicable vehicles not counting toward your Fleet volume objectives.

The Fleet Account Number will be used to determine VIP versus Retail eligibility.



General Motors: TCS Exclusive Discounts

VEHICLE ORDERING AND DELIVERY

To ensure the accurate tracking of orders and timely payment of Competitive Assistance Program (CAP) allowances, use of the assigned CAP Processing Code and the GM Fleet Account Number (FAN) is required on all vehicle order requests and delivery reporting data for models specified in the agreement as eligible for Competitive Assistance.

It is imperative that you communicate the Processing Code and FAN to your dealer and/or leasing company.

Customer Name: Trane Dealers and Distributors

Processing Code: KBL

FAN: 819257

STANDARD VEHICLE ORDER REQUIREMENTS

- ➔ The assigned CAP Processing Code identified above must be included on the order.
- ➔ Do not use the CAP Processing Code on units that are taken out of stock that will receive the retail alternative. These units will still require a fleet delivery type.
- ➔ One of the fleet order types listed below must be included in the order.

Fleet Order Type: FLS - Fleet Lease

Fleet Order Type: FNR - Fleet Commercial



Nissan and Infiniti: Trane Comfort Specialist Exclusive Discounts

HOW TO GET THE EXCLUSIVE CUSTOMER CARE DISCOUNT:

- 1 Print the Nissan fleet program form from the Trane portal
- 2 Contact your preferred Nissan/Infiniti dealership, or Fleet Management Company
- 3 Choose the vehicle you want to purchase
- 4 Present the form and proof of being a current Trane authorized dealer

Please contact your Nissan Commercial Sales Manager (CSM) with any questions.

For more information, please visit NissanUSA.com/business-fleet

**This benefit is available to USA dealers only*



Local Presence Management



Online local listing Presence and management powered by LPM

ABOUT







Online local listing information—name, address, phone number, operating hours, etc.—are critical to any local marketing initiative. In fact, having a visible, accurate, and up-to-date local presence on Google, Apple Maps, and other major platforms is the key to reaching the right customers at the right time. You can manage this data yourself, but it's an ongoing process that takes a lot of time, effort, and expertise.

Using DAC's Local Presence Management (LPM) program, you don't have to worry about the trouble that goes into managing your listings. We'll provide your business with a robust local presence by actively managing your listings across local vendors. This will help you improve your presence and acquire new customers from platforms like Google, Apple, and Bing.

97% of people learn more about local businesses online than anywhere else—and 88% of mobile searches for local businesses result in a call or visit to the business within 24 hours.¹ It not only demonstrates the importance of competing in local, but shows that you're only minutes away from capturing customers by improving your online presence and reputation.

¹ Blog.hubspot.com/marketing/local-seo-stats

WHAT WE WILL DO

- | | |
|---|--|
| <p>1 Ensure the right information is shown to online users during the moment they're looking for local HVAC services, helping you stand out from the competition.</p> | <p> Robust, user-friendly dashboard</p> |
| <p>2 Syndicate your correct business information to all major search engines, social platforms, voice assistants, and business directories.</p> | <p> Expert guided Google Business Portfolio (GBP) optimization</p> |
| <p>3 Optimize your online listings with rich content related to your business.</p> <ul style="list-style-type: none"> • DAC will work with you to ensure your Google My Business (GBP) listing is fully optimized • The optimization of your Google listing is critical for local ranking on Google. | <p> Dedicated support team</p> <p> Centralized review management and response</p> <p> Connected reviews on dealer locator (requires GBP access)</p> |
| <p>4 Aggregate your online reviews into a single dashboard for easy management and responses.</p> | <p> Real-time reporting</p> |



DAC by Local Presence Management

ABOUT

DAC drives transformational growth for our clients with integrated, data-driven solutions. We combine best-in-class digital media expertise with deep knowledge of our clients’ businesses to strategically engage customers, no matter who they are and—uniquely—where they are. Our LPM program is best in class and specifically designed to help local businesses succeed in local search.

How does DAC’s LPM program differ from other online listing programs?

- ➔ Dedicated support team to help resolve any listing issues, and provide expert guidance to help you better optimize your GBP listing.
- ➔ Standardization and submission of dealer location data to search engines, online directories, and other top-tier websites.
- ➔ DAC double-checks the location data to ensure all business information is properly displayed. This active management gives DAC a competitive differentiation to the other online listing program providers.
- ➔ DAC is uniquely positioned in the market place as an agency with technology. This allows DAC to offer centralized reporting tools that give dealers access to an industry-leading dashboard called TransparenSEETM.

How can dealers take advantage of review monitoring?

- ✔ Review monitoring across numerous review sites, all in one place.
- ✔ Customizable notifications for different star ratings to be sent at a cadence that suits you.
- ✔ Responding to reviews directly from the dashboard, which again makes overall management even easier.

Have you granted DAC GBP access yet?

Are your reviews, star ratings, and review responses showing up on the dealer locator? Does your location show up in Google search results? If not, it’s probably because you haven’t provided DAC with GBP access.

BENEFITS OF PROVIDING DAC ACCESS

Unlike other search engines, Google started requiring GBP access in 2019. This means none of your reviews will show up on the locator unless you provide access. Your store may also not show in Google search results. Google owns 92% of search, so that’s a big deal!

- ✔ **Connecting reviews to the dealer locator**—the only way to have reviews connected to the locator now is by granting DAC GBP access
- ✔ **GBP performance reporting**—granting access will allow DAC to provide automated monthly reports on your GBP leads and search appearance performance
- ✔ **Increase visibility and leads from Google Maps**—dealers who have provided access saw a 16% increase in leads and an 85% increase in listing views
- ✔ **Full-service listing support**—if you ever experience issues with invalid reviews or duplication, DAC can help resolve these on your behalf

Granting GBP access is easy!

- 1 Log into Google Business Profile
- 2 Click on “users” from the left side drop down menu
- 3 Click on the link in the top right corner to add new users
- 4 Add Trane.Client1@gmail.com
- 5 Select the role of “manager” and click invite
- 6 Email trane@dacgroup.com to confirm access has been received



E-Learning Access



A world of HVAC knowledge at your fingertips, powered by Trane

ABOUT

Over 200 eLearning courses are available to you and your employees for new and existing products, programs and the basics of HVAC.

- + Variable Speed
- + Obituary of a Compressor
- + Brazing
- + Zoning
- + Core Principles of HVAC
- + HVAC Basics
- + Product Overviews
- + Dealer Diagnostics
- + Why Trane

FIELD TECH HELP

Technical videos allow your technicians access to up to date training on new and existing products which can be accessed from anywhere at any time.

- + Variable Speed
- + Motors
- + Air Handlers
- + Furnaces
- + Communicating Controls
- + Outdoor Products
- + CDA
- + Ductless

LEARNING PATHS

Over 30 Learning Paths are available to you and your employees for several different roles within your company.

- + Install Technician
- + Service Technician
- + Sales
- + Customer Service
- + Marketing
- + Management
- + Business Development
- + NATE
- + Core Principles of HVAC

INSTALLATION TECHNICIAN TRAINING PROGRAM

Are you struggling to find training for your installation technicians? Trane is offering two learning path opportunities for your technicians.

Courses will include HVAC fundamentals, control wiring, system configuration, brazing, air flow, refrigeration commissioning, furnace commissioning, accessories and communicating systems.

Your technician will receive 1-hour of online course with real world interactivities, followed by one hour of a virtual training. Visit the TCS Program Microsite for more information.



WATCH A FREE VIDEO DEMO

Scan the QR code with your phone to watch the E-Learning video demo.

PODCASTS

Podcast episodes are easy to access from anywhere at any time. Click and play from our newsletters or from the LMS.

- ➔ HVAC: A Conceptual Understanding
- ➔ HVAC: System Options
- ➔ Why Trane
- ➔ Variable Speed
- ➔ LCU 3.5 Ton Comparison
- ➔ Digital Topics
- ➔ RunTru™ by Trane®
- ➔ S Series Furnace



MANAGER ACCESS

Create an environment of learning with employees by becoming a manager on the LMS. Invest time discussing their development regularly throughout the year. Email the Learning Resources team to be set up.

- ➔ Assign courses and learning paths
- ➔ Create learning paths
- ➔ Run learning reports
- ➔ Track completions
- ➔ Receive notifications

HOW TO LOGIN AND ACCESS LEARNING

Through ComfortSite

[ComfortSite](#) > [Training Center](#) > [Trane LMS Single Sign On](#)

Direct login

View catalog by clicking eLearning Course Catalog TraneLearningResources.com

Username: Your ComfortSite Username

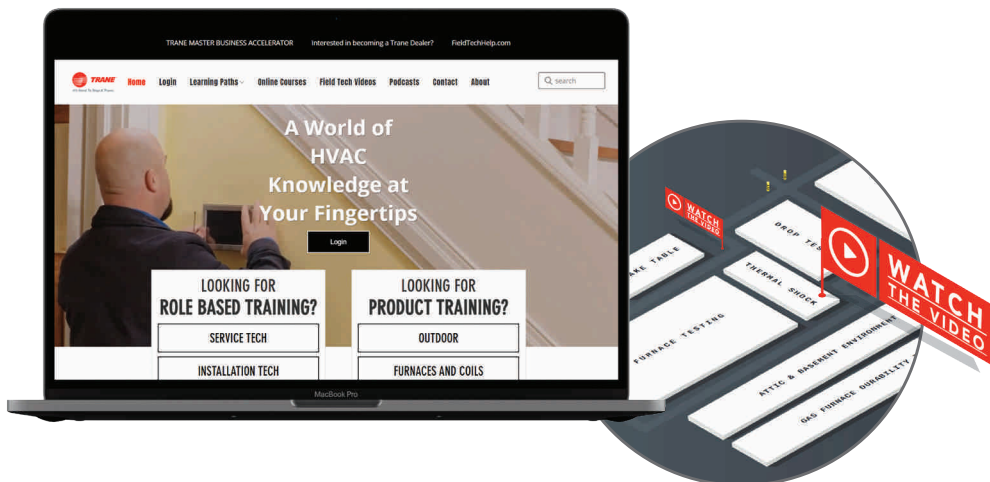
Password: welcome

For Login help, email:

learningresources@tranetechnologies.com

Field Tech Help Videos available without a login:

FieldTechHelp.com





Employee Retention



Business administration and company benefits, powered by Insperity

ABOUT

Insperity is one of the largest providers of resources for small businesses. They bring a strategic combination of administrative relief, best in class benefits through United Healthcare, and subject matter experts to help you stem the flow of good talent.

Qualifying NEW Insperity customers that connect directly through the program will get a minimum of 17% off Insperity service fees. Dealers must click the link through the TCS microsite or email TCS@Insperity.com to activate these offers.

- ➔ Medical benefits (grouped with 10,000 other small businesses to maximize savings and long-term cost protection)
- ➔ 401K administration
- ➔ Workers Comp insurance & administration
- ➔ Employee development & leadership training
- ➔ Organizational strategy & succession planning
- ➔ Safety and compliance training & administration
- ➔ Payroll and tax administration
- ➔ Recruiting & background checks
- ➔ HR expertise & administration
- ➔ **NEW for 2024:** National Account Partner

THE BENEFIT

When you refer a company that completes an initial meeting with an Insperity® Business Performance Advisor, you'll get 200 Loyalty Points.*

If you refer a company that completes its first payroll with Insperity Workforce Acceleration™ solution and has five or more full-time employees, you'll receive \$500 USD.*

If the company you refer completes its first payroll with the Insperity Workforce Optimization® solution, here are the breakdowns*:

Full-time employees	Reward Amount
5-9	\$1,000 USD
10-24	\$3,000 USD
25-49	\$4,000 USD
50+	\$5,000 USD



* Restrictions apply. Visit loyaltypoints.insperity.com for details.

*This benefit is only available to USA dealers



Parts Concession

Concession a major component, powered by Trane

This program benefit will give dealers the ability to concession a Major Component Part (as defined below) that is within certain time periods ("Concession Period") of the registered limited warranty expiring as identified in section 1.2. below. Trane will concession the Part and the dealer must concession 100% of the labor for the replacement.

1.1.

The Concession program applies only to these major components: Compressor, Outdoor coil, Indoor coil, and Heat Exchanger ("Major Component Part" or "Part").

1.2.

The Concession Period past the registered limited warranty is dependent on the length of the registered limited warranty period. Major components that fail within the following timelines are eligible for this program benefit:

1.2.1.

10 year registered limited warranty period: Concession Period is 12 months within the expiration of the 10 year registered limited warranty period.

1.2.2.

5 year registered limited warranty period: Concession Period is 18 months within the expiration of the 5 year registered limited warranty period.

1.2.3.

1 year registered limited warranty period: Concession Period is 24 months within the expiration of the 1 year registered limited warranty period.

***Applies only to Residential Equipment (5 ton and under)

***DOES NOT INCLUDE: 3-PHASE EQUIPMENT, RUNTRU OR TRANE®/MITSUBISHI PRODUCTS.



Employee Recruitment

NEW for 2024: By Talent Acquisition & Orion Talent

Orion Talent helps you fill 1 or 100,000 roles with the right people and the right solution, so you can build a winning team - today and into the future. Orion Talent powers all your talent needs through our diversity rich network of highly sought-after candidates, including an engaged community of veterans and military personnel. They will connect you with ready-now candidates and design-led recruiting solutions that work for you. With your partnership, we are enriching lives and elevating the recruiting experience. Orion is a proven recruiting partner through our Trade Warriors Program, learn more here [Home - Trade Warriors™](https://www.trade-warriors.com) (trade-warriors.com)

Qualifying Orion Talent customers that connect directly through the program will get a minimum of 10% off Orion Talent recruitment fees. Dealers must click the link through the TCS microsite to activate these offers.

Contacts

We've compiled a list of contacts for each of the partners in this guide.



PODIUM
support@podium.com
801-999-8216



EGIA
Stephanie Angeles
916-265-0322
sangeles@egia.org



SEARCHKINGS
sales@searchkings.ca
Call: 1 (888) 335-4647 x 1
Text: (647) 699-3443



WELLS FARGO
1-800-577-5313
Trane Technologies Financial Services
1-800-724-6026
Wells Fargo Dealers
(800) 551-5111
Wells Fargo Cardholder
(800) 459-8451



SPIFF
ContactUs@ExperienceDealerRewards.com
888-565-7628



DO WHAT'S RIGHT
Contact your local AM/TM




MEDIAGISTIC
AccountDevelopment@Mediagistic.com
1-866-837-6997




PRICEBOOK DIGITAL
john.mccarthy@pricebook.digital





PAYZER
 payzercare@payzer.com
Customer Care: 866-488-6525

FIELDEDGE
 Channel Team
demo@fieldedge.com
(470)-200-0770

JOBBER
 getjobber.com
1-888-721-1115

SERVICE FUSION
 Ed Bishop
ebishop@servicefusion.com
412-295-8613

P3 HVAC
 info@hvacbusinesssolutions.com
713-270-6400

SERVICETITAN
 partner-sales@servicetitan.com
818.600.7129

HOUSECALL PRO
 jordan.meltzer@housecallpro.com
310-697-2001

APTORA
 Aptora.com/contact-us
913-276-2177



VERIZON
scott.s.williams@verizonwireless.com
901-201-8746



PARTS CONCESSION
Contact your local FSR



WARRANTY PRODUCT EXCHANGE
Your local FSR or your local AM/TM



E-LEARNING
learningresources@
tranetechnologies.com
Or text ASAIR to 888-206-1619



DAC GROUP
trane@dacgroup.com
502-582-3565
Toll Free: 1-800-532-3565



DISPATCH
support@dispatch.me



BAYTEK/QUICKBOOKS
hrplus@baytek.com
800-487-3224



INSPERITY
TCS@insperity.com



CHRYSLER
FLCenter@fcagroup.com
1-800-999-3533



TCS SUPPORT
TCSHelp@asairmax.com



NISSAN
scott.bargatze@nissan-usa.com
615-495-9645



GENERAL MOTORS
Colin Lyons
colin.1.lyons@gm.com



TRANE DEALERS ARE AS HARD TO STOP AS A TRANE ITSELF.

Independent Trane dealers take great pride in creating your perfect indoor environment. They are some of the most highly trained professionals in the business—with an extensive understanding of the movement and conditioning of air, and the expertise to advise, install and maintain the right system for your home.



It's Hard To Stop A Trane.®

All trademarks referenced are the trademarks of their respective owners.

About Trane

Trane – by Trane Technologies (NYSE: TT), a global climate innovator – creates comfortable, energy-efficient indoor environments for commercial and residential applications. For more information, visit Trane.com or TraneTechnologies.com

© 2024 TRANE. ALL RIGHTS RESERVED. CS-5055-17 10/23

WE ARE COMMITTED TO USING ENVIRONMENTALLY FRIENDLY PRINTING PRACTICES.

