



It's Hard To Stop A Trane.

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TRANE® COMFORT SPECIALIST DEALER PROGRAM

A COMPLETE GUIDE TO BENEFIT OPTIONS



TRANE
TECHNOLOGIES



CLICK TO NAVIGATE!

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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, 2022 - DECEMBER 31, 2022

<p>SELECT DEALERS have the option to choose up to</p> <p>2 BENEFITS</p>	<p>PREMIER DEALERS have the option to choose up to</p> <p>6 BENEFITS</p>	<p>PRIME DEALERS have the option to choose up to</p> <p>4 BENEFITS</p>
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¹ Trane received the highest numerical score in the proprietary Lifestory Research 2019 America's Most Trusted® HVAC Brand study. Your experiences may vary. Visit www.lifestoryresearch.com

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

ANCILLARY BENEFITS

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

Logos for partner brands: Chrysler, Ford, GM, Nissan, Infiniti, DAC, Verizon, Baytek, InSperty.

Online Reputation Management & Customer Interaction*



Powered by Podium

THE BENEFIT

Trane will provide a 1-year license for Podium's Select Plan* for unlimited users at the dealership (~\$4,800 USD value) for 1 TCS benefit. Select Plan includes the following features: Reviews, Feedback, Inbox, and Payments. Select Plan includes 1 dealer location (additional fees apply for additional locations).

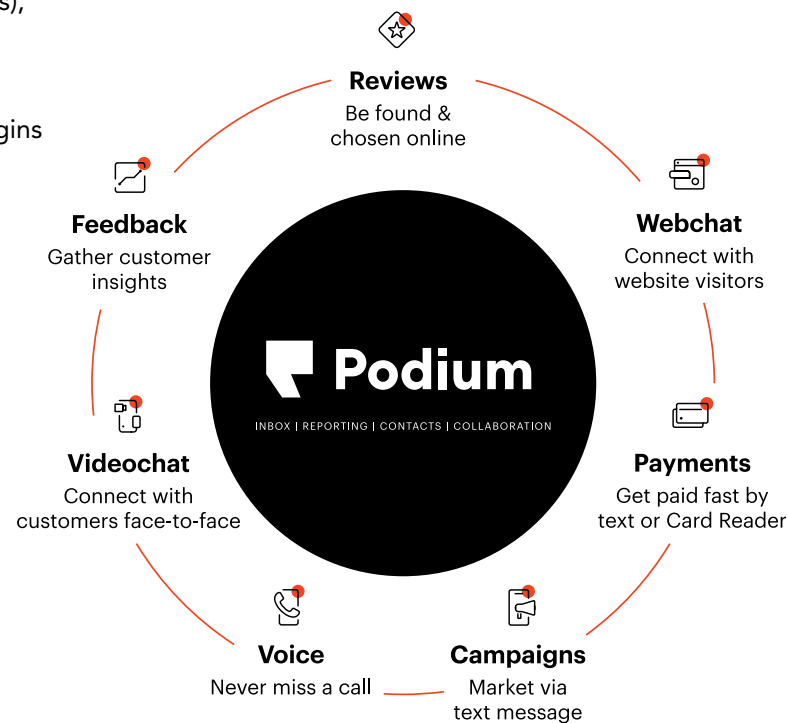
OR

Trane will provide a 1-year license for Podium's Advantage plan for unlimited users at the dealership (~\$9,800 USD value) for 2 TCS benefits. Advantage Plan includes the following features: Reviews, Feedback, Inbox Pro, Payments, Webchat Pro, SMS Campaigns (500 subscribers), and Video Chat. Advantage Plan includes up to 7 dealer locations (additional fees apply for additional locations). The 12-month period begins when the dealer signs their agreement with Podium.

**Dealer will be required to select this option if their Google rating is below 4.6 as of October 15, 2021.*

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

SELECT PACKAGE

PODIUM CORE

Reviews
Feedback
Inbox
Payments (2.49% +30)**

FEATURES

Integration
Automation
Templates

SUPPORT

Live Chat Support
Help Center Guides
In Product On-boarding

DETAILS

Single Location Only
Trane On-boarding Webinars
Strategic Payment Rate

ADVANTAGE PACKAGE

PODIUM CORE

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

THE BENEFIT

Trane will provide a \$3,500 USD (\$4,200 CAD) credit to your SearchKings account that can be used for digital advertising and any associated management fees.

New for 2022: Use your SearchKings credit to help find and hire technicians with targeted Google Recruiting campaigns.

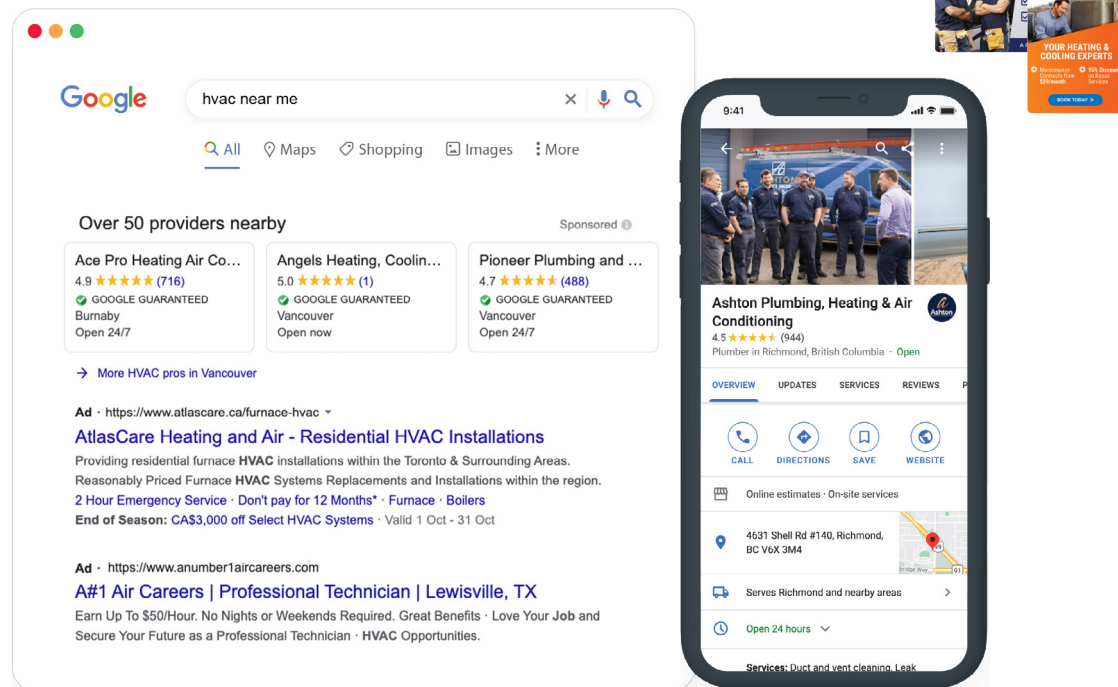
ABOUT

Boost your incoming service and install opportunities by partnering with an industry leader in digital advertising that can help with lead generation efforts like Google Local Services (GLS), Pay-Per-Click (PPC), Re-targeting, YouTube, banner ads, microsites & more.



THE BENEFIT: DOUBLE-DOWN

The SearchKings benefit can be selected twice as part of the dealer's benefit selection for a total of \$6,000 USD credit (\$7,200 CAD).



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

MONTHLY PROGRAMS*

	What's included	SearchKings Management Fee	Suggested Ads Budget
Local Services Ads by Google Pay-per-lead solution for Google Guaranteed service providers.	<ul style="list-style-type: none"> Dedicated account manager and support line Recertification and documents management Dynamic bid management and account optimization Access to Google beta products Lead dispute training and support Google My Business support New for 2022 	\$83 /month* *charged as \$1000 annually	\$200-600 /month
Display Advertising Re-marketing and display campaign that help you get in front of local in-market homeowners and bring back visitors who previously visited your site.	<ul style="list-style-type: none"> Present company-branded Google Ads when customers are searching for your services Opportunity to highlight your differentiated offer (years in business, Google reviews, etc.) Promote service and maintenance plans to existing customers 	\$250 /month	\$500-750 /month
Hiring Campaign Find and hire service technicians.	<ul style="list-style-type: none"> New for 2022 Targeted Search and Display Advertising that identifies and reaches relevant audiences Uses targeted "we are hiring" search terms and banner creative 	Starting from \$350 /month	\$1,000-1,500 /month
Pay-per-click Advertising Build a comprehensive plan to grow your business with digital advertising.	<ul style="list-style-type: none"> Dedicated account manager Monthly business review Customized digital marketing plan to support your business goals Active management of your Google Ads and/or Microsoft Advertising accounts Advanced call-tracking and lead scoring solutions 	Starting from \$450 /month	\$2,500+ /month

ADD-ON SERVICES*

Advertising Microsite Dedicated site to capture and convert traffic from your pay-per-click campaign	WordPress Corporate Site	Display Banners Required for any digital campaign (display, hiring and pay-per-click)
<ul style="list-style-type: none"> Optimized site with 10-12 pages Integration with Podium web chat (subscription required) Intuitive design with a special focus on call-to-action and lead conversion 	<ul style="list-style-type: none"> Customized design using industry best practices Updated web technology to ensure site speed and usability Self-managed option (WordPress) 	<ul style="list-style-type: none"> 22 ad sizes that can be used across various platforms (mobile, desktop, tablet) + responsive ad sizes.
Set up fee \$1,500 Available with an active pay-per-click campaign	Development fee \$5,300 Optional monthly hosting (starts at \$99/month)	Single Set \$500 Three Sets \$1,200

*All values are in USD.

Field Service Management



Powered By: ServiceTitan, Payzerware, Aptora, FieldEdge, ServiceFusion, Jobber, P3

THE BENEFIT

Trane will provide a \$2,000 USD credit to help offset the costs of one of the seven Field Service Management (FSM) providers listed.

THE BENEFIT: DOUBLE DOWN

The FSM benefit can be selected twice as part of the dealer's benefit selection for a total of \$4000 USD credit.

ABOUT

Want to grow revenue or simply run a more profitable business? Transform your business by partnering with a premier FSM 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 providers below.

#1 Payzerware



Payzerware 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

"Using Payzerware has made our business more efficient. We're seeing more customers, closing more sales, and handling less paper. Our techs are seeing one additional customer per day. Each additional service call is worth \$200 on average which means more profit for our company."

Payzerware is worth the monthly investment and has been making a positive impact on our company."

— Forest City Heating & Air



#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



Field Edge is the #1 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, Field Edge gives everyone on your team the information they need to succeed.



#4 ServiceFusion

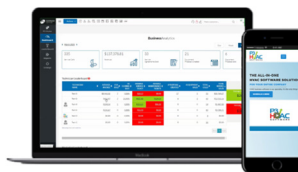
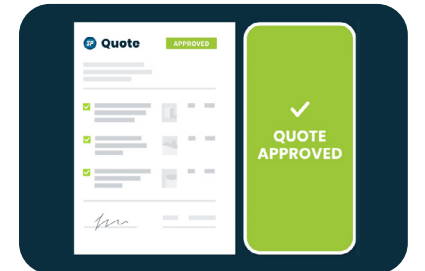
ServiceFusion is a simple, affordable software built to help service contractors grow their businesses. ServiceFusion gives service contractors one centralized system for customer management, scheduling, invoicing, create automated payment reminders for customers, payments, reporting, and more.

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



#5 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.



#6 P3 HVAC

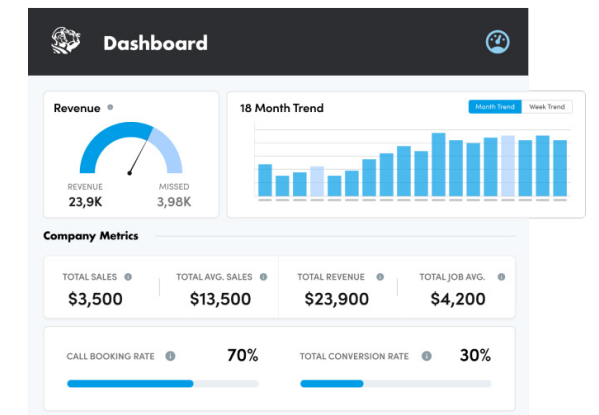
Grow your profits, improve customer service, simplify your business, and save time and money. Trane Comfort Specialists get up to \$2000 or 50% off. Trane contractors get up to \$500 off!

#7 ServiceTitan



ServiceTitan is the #1 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
- REPORTING
- SALES
- PAYMENTS
- DISPATCH
- INVENTORY
- MARKETING
- EQUIPMENT
- ACCOUNTING
- AGREEMENTS
- PAYROLL
- CUSTOMER SERVICE



"Since using Service Titan our Average Ticket has gone up 83%, the mobile app and ease of use for our technician and office definitely has proven its benefits!"

— Orangutan Home Services



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 (~\$180 CAD) 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 re loadable VISA Rewards Card for quick payment.**
- ✓ **Sales incentives are taxable income, and the owner of card will receive 1099 (T4 for Canada).**
- ✓ **See the 2022 Trane TCS High Efficiency SPIFF Sales Plan for additional information.**
- ✓ **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	\$75
4TTR7, 4TWR7	\$50
Product Category: Indoor Units	
TAM9, TEM8, TUHM, TDHM, TUD2-C, TDD2-C	\$75
S9V2-VS, S9V2, TUD2-V, TDD2-V, POV0, L8V1	\$50
Product Category: Packaged Units	
4DCZ6, 4WCZ6, 4YCZ6	\$100

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?

2021 RESULTS

TCS dealer sales professionals received an average of \$3,500 USD in sales incentives with the SPIFF program.

*See 2022 TCS Sustainability 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 2022 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 to determine which membership option is right for your business from the options below.

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 \$3,588 USD annually)
(Until the End of 2022)

PREMIUM
MEMBERSHIP

ALL PLUS LEVEL BENEFITS
+ Free Attendance to all LIVE Training Events (In-Person & Virtual Workshops plus Conferences)

DEALER COST AS BENEFIT SELECTION: \$2,000
(Standard Rate is \$5,988 USD annually)
(Until the End of 2022)

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.

ABOUT

The key to winning the sale is making it easy for the homeowner to say, "yes!" In 2020, 82% of Americans said that they couldn't afford a \$500 emergency expense. Offer your customers the best rates with the Wells Fargo Growth Benefit.



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. Equipment will be limited to 16 SEER, non-communicating equipment. Excludes 3 phase products.

QUALIFYING EQUIPMENT FOR CHARITABLE OPPORTUNITIES

Model Family	Product Category
Outdoor Units	4TTR6, 4TWR6, 4TWR5, 4TTR4, 4TWR4, 4TTR3, A4AC3, A4AC4, A4AC6, A4HP4, A4HP6
Package Units	4WCC4, 4YCC4, 4TCC4, 4WHC4, 4TCA4, 4WCC4, 4YCC4
Furnaces	S9B1, S8B1, S9X1, S9X2, S8X2, A801X, A951X
Air Handler Units	TEM6, TEM4, TMM4, TMM5, TEM3, A4AH4, A4AH6



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 1, 2022, whichever comes first. ***Full MAX claims process for this benefit will be available soon.*** 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

ABOUT

If you sell systems and equipment, we have you covered! 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, systems, 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.

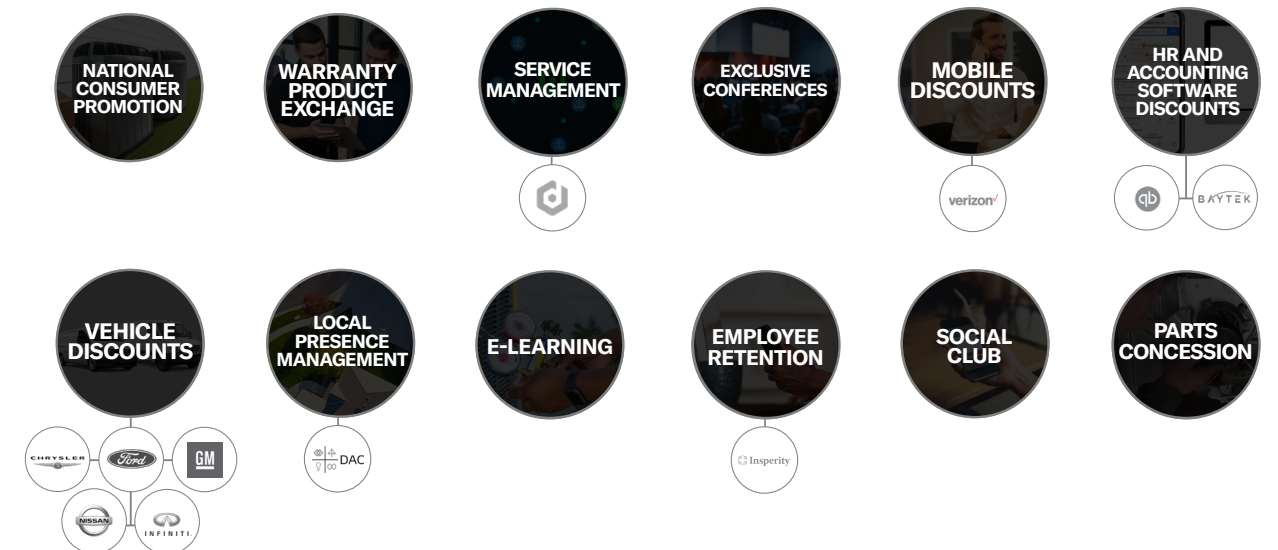
*Note that additional user licenses and other add-on products and services may be purchased directly from Pricebook Digital at an additional cost.

- ➔ Dealers Currently Using PricebookPlus - 12 month service subscription (1/1/2022 through 12/31/2022). 1 TCS benefit selection - retail value \$3300 USD. Includes all Trane, Trane-Mitsubishi, RunTru brands, and 3 user licenses.
- ➔ Or, dealers new to PricebookPlus - Onboarding and Setup, plus 6 month service subscription. 1 TCS benefit selection - retail value \$4200 USD. Includes all Trane, Trane-Mitsubishi, RunTru, and 3 user licenses.
- ➔ Or, dealers new to PricebookPlus - Alternate Selection - Onboarding and Setup, plus 12 month service subscription (or through 12/31/2022) - retail value up to \$5733 USD. **2 TCS benefit selections.** Includes all Trane, Trane-Mitsubishi, RunTru, and 3 user licenses.



ANCILLARY BENEFITS

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





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



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, AMERISTAR 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



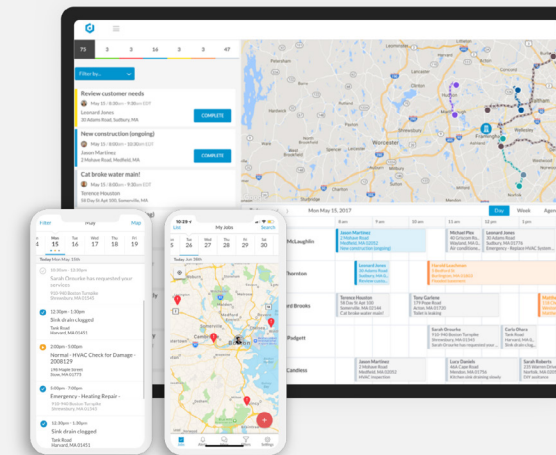
LESS TIME

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



TCS Conferences



Unique and exclusive conference experience powered by Trane

As a loyal Trane Dealer, you will be invited to Trane's TCS Conference, as CDC/OSHA guidelines and recommendations permit. When invitations are sent, availability will be limited and on a first-come first-serve basis.

Dealer will be responsible for flight and incidentals outside of group meals and activities. In some cases, we are unable to hold an in-person conference.

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.



Discounts on Quickbooks and HR Basic



HR BASIC

ABOUT

Outsourced, on-demand HR solutions for your HVAC business. What makes us different? We're part of your team! Here's what HRBasic includes:

Manager's HR Help Line™

- ✔ Consult with our HR Experts about HR issues to keep you out of trouble
- ✔ Unlimited engagements per month via phone, email or chat

Background Checks

- ✔ 3 Free multi-jurisdictional background checks per month

Handbook Template

- ✔ Receive a handbook template designed to meet federal regulations and the regulations of your state.

ShareHR™ Community Forum

- ✔ Private access community message forum

HRHealthCheck™

- ✔ Let our HR experts review your current HR processes to help you understand gaps and potential problem areas

- ➔ Understand your business objectives & workforce
- ➔ Identify, evaluate & prioritize your labor compliance risks
- ➔ Suggest the best course of action for your situations
- ➔ Provide risk mitigation tools to keep you out of trouble
- ✔ HR Outsourcing
- ✔ Employee Handbooks
- ✔ Payroll Services
- ✔ Employee Benefits
- ✔ Employee Screening
- ✔ Benefits Administration

Only \$50/month or \$540/year
(\$60 savings vs monthly plan)

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, Ford, 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.

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

- 37ALF (2020 Model Year Units)
- 37AMF (2021 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: TCS Exclusive Discounts

HOW TO GET THE EXCLUSIVE TCS DISCOUNT:

- 1 Print the Nissan fleet program form from the Trane Technologies 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



Ford: TCS Exclusive Discounts

ABOUT

According to survey results, the Ford Fleet team is #1 in commercial fleet customer satisfaction and we are determined to stay there. We are committed to delivering products that fulfill the needs of your drivers. We will listen to your needs and work with you to continuously improve our service. The Ford Customer Information Center and our website can provide you with a variety of essential information on 1-800-34-FLEET, or at Fleet.ford.com.

We have implemented a number of actions in recent years to ensure competitive whole life costs. They include:

- A focus on quality
- Technological advances to improve fuel economy, vehicle performance and safety
- Providing products with high residual values
- Exciting products at competitive prices
- Roadside assistance for drivers during powertrain warranty at 1-800-241-FORD

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.

WHAT WE WILL DO

- 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.
- 2 Syndicate your correct business information to all major search engines, social platforms, voice assistants, and business directories.
- 3 Optimize your online listings with rich content related to your business.
 - DAC will work with you to ensure your Google My Business (GMB) listing is fully optimized
 - The optimization of your Google listing is critical for local ranking on Google.
- 4 Aggregate your online reviews into a single dashboard for easy management and responses.

- Robust, user-friendly dashboard
- Centralized review management and response
- Expert guided Google My Business (GMB) optimization
- Connected reviews on dealer locator (requires GMB access)
- Dedicated support team
- Real-time reporting



¹ [Blog.hubspot.com/marketing/local-seo-stats](https://blog.hubspot.com/marketing/local-seo-stats)



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 GMB 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 TransparenSEE™.

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 GMB 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 GMB access.

BENEFITS OF PROVIDING DAC ACCESS

Unlike other search engines, Google started requiring GMB 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 GMB access
- ✓ **GMB performance reporting**—granting access will allow DAC to provide automated monthly reports on your GMB 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 GMB access is easy!

- 1 Log into Google My Business
- 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

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

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



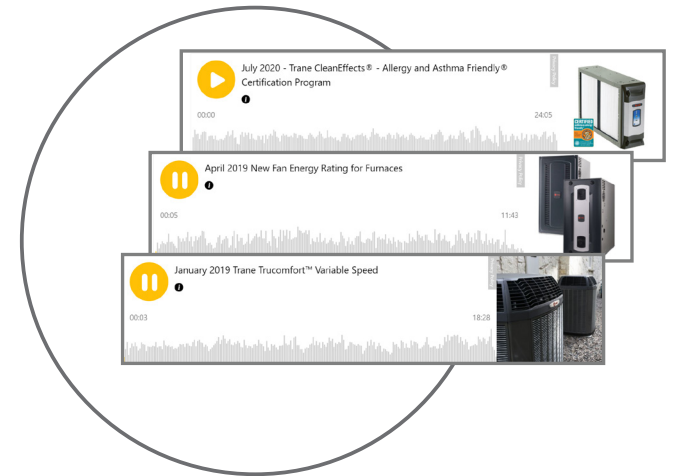
WATCH A FREE VIDEO DEMO

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

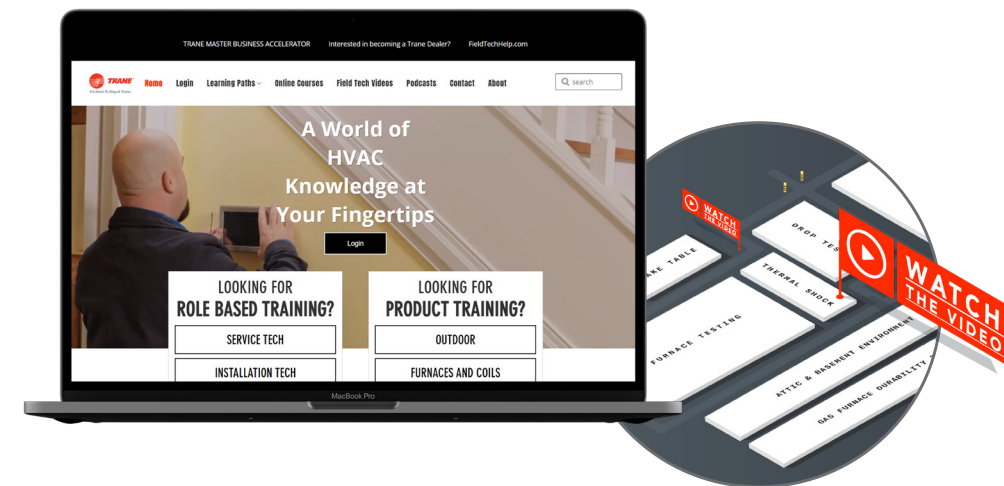
Password: welcome

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.

- ➔ 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

THE BENEFIT

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

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.*

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
10-24	\$3,000
25-49	\$4,000
50+	\$5,000

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

*This benefit is only available to USA dealers



Trane Social Club



Curated social content powered by Trane Social Club

ABOUT

For 2022, Trane Comfort Specialist™ dealers can join the Trane Social Club. TCS Dealers can build their social media presence and gain access to specially curated, Trane branded, social media posts. This content can be customized and shared to dealers' social media accounts. Additional details can be found on the Elite Dealer Program microsite.

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 AMERISTAR PRODUCTS OR TRANE®/MITSUBISHI PRODUCTS.

Contacts

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



PODIUM
support@podium.com
801-999-8216



EGIA
dyashinsky@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



SPIFF
TBD



DO WHAT'S RIGHT
Contact your local AM/TM



PAYZERWARE
kent@payzer.com
866-488-6525

FIELDEDGE
inbound@fieldedge.com
(800)-226-7529

JOBBER
getjobber.com
1-888-721-1115

SERVICEFUSION
servicefusion.com
888-902-0304

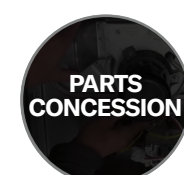
P3 HVAC
hvacbusinesssolutions.com/
trane-contractor
info@hvacbusinesssolutions.com
713-270-6400

SERVICETITAN
partner-sales@servicetitan.com
818.600.7129

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



CONFERENCES
richard.rojo@tranetechnologies.com



PARTS CONCESSION
Contact your local FSR



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



E-LEARNING
tranelearningresources.com
learningresources@tranetechnologies.com



SOCIAL CLUB
Rayanne Duchane
rayanne.duchane@tranetechnologies.com



DISPATCH
support@dispatch.me



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



INSPERITY
TCS@insperity.com



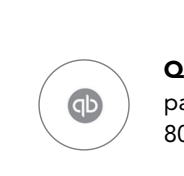
DAC GROUP
trane@dacgroup.com
502-582-3565
Toll Free: 1-800-532-3565



TCS SUPPORT
tcs-help@tranemax.com



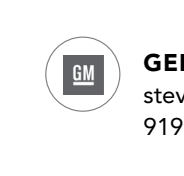
BAYTEK
hrplus@baytek.com
800-487-3224



QUICKBOOKS
partners@baytek.com
800-487-3224



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



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steven.english@gm.com
919-280-6136

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



FORD
1-800-34-FLEET



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

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WE ARE COMMITTED TO USING ENVIRONMENTALLY FRIENDLY PRINTING PRACTICES.

