

2022 American Standard Customer Care™ Program

Field Service Management/CRM growth benefit



Process to Receive Credit (IWD only):

Thank you for your partnership during enrollment for the 2022 Customer Care program. Below are steps for submitting a claim for dealer reimbursement (\$2,000 or \$4,000 double-down) of their FSM growth benefit. The credit is available only to those dealers who selected FSM/CRM during Customer Care enrollment.

- **NOTE** – the funds to provide this credit will be included in a separate “CRM Fund” with the distributors account. The first batch was uploaded 2/1/21 which includes dealer enrolled prior to that date. Future uploads will occur monthly as new enrollments are made.
- Funds can be viewed within MAX: *Funds Management > Funds Management Ledger*
- A dealer’s Service Management/FSM credit will not be reflected until their first billing period.

Steps:

1. Login to MAX
2. Under “Funds Management” header, click “Submit a Claim Online”
3. Select an Expense Type: **Sales Support**
4. Select an Expense Category: **Field Service Management – Elite Dealers**
5. Select Fund: **CRM Fund**
6. Enter the credit amount per the growth benefit selection (\$2000 or \$4000)
7. MAX will audit claim to ensure it matches ACC Enrollment selection
8. Once approved by MAX, claims will be sent to finance for processing of account credit and the distributor will pass that o not the dealer

ADVERTISING MATERIALS | **FUNDS MANAGEMENT** | SALES SUPPORT | INFO CENTER | REPORTS | DEALER LOCATOR | ENROLLMENT | SUPPORT

SUBMIT A CLAIM

1 Enter Activity Information | 2 Supporting Claim Documentation | 3 Preview & Submit | 4 Confirmation

Step 1: Enter Activity Information

Select Preapproval: <input type="text" value="--Select Preapproval--"/>	Please be prepared to submit the following: Approved vendors as stipulated in the Customer Care Sales Plan are co-op eligible. ServiceTitan (including Marketing Pro), FieldEdge, Aptora, Jobber, P3, Payzerware, and ServiceFusion. For dealers that have selected FSM as a CC growth benefit, payout for co-op will be after they have utilized their CC funds and should not exceed total yearly cost of FSM.
Select Sales Plan: <input type="text" value="--Select--"/>	
Preapproval or Sales Plan is recommended but not required. You can only submit a claim against either a Preapproval or a Sales Plan.	
* Select an Expense Type: <input type="radio"/> Advertising <input checked="" type="radio"/> Sales Support	
* Select an Expense Category: <input type="text" value="Field Service Management-Elite Dealers"/>	
* Select the brand represented: <input type="radio"/> American Standard <input type="radio"/> Ameristar	
* Select Fund: <input type="text" value="CRM fund"/>	

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Enrolled Dealers Report

To reference which dealers selected the Service Management/FSM growth benefit, you can download a report from MAX. It will also indicate which platform the dealer identified (ServiceTitan, Service Fusion, etc.). Please see the steps below to navigate to this report:

- Log into MAX and hover over ENROLLMENT in the toolbar.
- Click on “Enrollments Portal.”
- Notice there are two options at the top – “Qualified Dealers” and “Enrolled Rewards.” Click on “Enrolled Rewards.”
- From here you will see an “Export to Excel” option. Click that to export and download the report.

The screenshot shows the MAX software interface. At the top, there is a navigation bar with several menu items: ADVERTISING MATERIALS, FUNDS MANAGEMENT, SALES SUPPORT, INFO CENTER, REPORTS, DEALER LOCATOR, ENROLLMENT (highlighted with a yellow circle), and SUPPORT. Below the navigation bar, the text "Distributor Enrollment Portal Enrollment Year: 2021" is displayed. Underneath, there are two tabs: "Qualified Dealers" and "Enrolled Rewards" (highlighted with a yellow circle). Below the tabs, there is a dropdown menu for "Entries" set to "5" and an "Export To Excel" button with a yellow arrow pointing to it. Below the "Export To Excel" button, the text "Enrollment Report" is displayed. At the bottom, there is a table with 15 columns: ReInvite, Status, Initial Enrollment Year, Elite Dealer ID, Company ID, MAX Number, Dealer Name, City, State, Distributor, Total Purchase, Customer Care Purchase, Percent Revenue, Podium, SearchKings, and SearchKings Vendor.

For assistance, contact:

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