

## Dealer Rewards Bulk Claims Submission Instructions

To submit **claims** using **one** bulk submission file:

- **HEADERS.** Columns header must be an **EXACT MATCH** with the columns in the **Dealer Rewards Bulk Claims Submission Template (see below)**. Here's [a link to the Bulk Submission Template](#)
- **FILE FORMAT.** Must be in **.csv** format (you can save an Excel file in **.csv**)
- **FILE NAME.** Name it something that makes sense for you
- **ROWS.** Use one row for each eligible product in the sale (e.g., **one serial number per row**)
- To reduce the potential for submission errors, include only products that are eligible in the promotion(s)
- Your bulk file will be checked by Dealer Rewards immediately after you submit it. All serial numbers will be validated, and all required fields must be completed. Please note it will **take 1-2 minutes** for your bulk submission to be validated. **If there are ANY ERRORS, the ENTIRE FILE will be rejected with error reasons. NOTE: claims will NOT BE placed on hold or processed, even if some rows do not contain errors.** Common errors are incorrect serial numbers or required information is missing. Your options are:
  - Correct errors and then resubmit the entire file, or
  - Remove any line/rows causing errors and then resubmit the file. Then correct errors and submit later either in a bulk submission or one at a time
- **All SPIFF claimants listed in Column A must first be registered in Dealer Rewards** or the file will be rejected. Direct unregistered SPIFF claimants to *ComfortSite >> Marketing Center >> Trane Dealer Rewards* to register

### Bulk Claim Submission Column Descriptions:

| A            | B             | C                      | D          | E                  | F                     | G                    | H                   | I                  | J               | K                         | L                     | M   |
|--------------|---------------|------------------------|------------|--------------------|-----------------------|----------------------|---------------------|--------------------|-----------------|---------------------------|-----------------------|---|
| RSP Username | Serial Number | Dealer Invoice Number* | Sold Date* | Installation Date* | Homeowner First Name* | Homeowner Last Name* | Homeowner Address1* | Homeowner Address2 | Homeowner City* | Homeowner State/Province* | Homeowner Zip Postal* | Warranty/Other Item (use only if non-serialized items are eligible for promotion) |

- **Column A [RSP Username] **Not Required**** – If your intention is to submit claims for SPIFF programs, or SPIFF *and* REBATE programs, **you MUST provide a Registered Salesperson's (RSP) USERNAME**. This is the RSP's USERNAME for signing into ComfortSite.
  - If the dealer owner/principal will receive all SPIFF incentives, enter the owner's **ComfortSite Username**. The OWNER/PRINCIPAL must complete Dealer Rewards Registration *before* he or she can submit claims or have claims submitted on his or her behalf.
  - If you do not want your bulk submission to generate any potential SPIFF payments, *even if your dealership is eligible*, leave column A blank. Dealer Rewards will only process rebate claims associated with your submission.

- **Column B [Serial Number]** **Required for Serialized Products** – If the product associated with the claim has a 10-digit serial number, **you must enter the serial number in Column B**. If a non-serialized product is eligible for a promotion (e.g., a warranty or non-serialized thermostat), leave this cell blank and use Column M instead. **If Column B is blank, then Column M must have content, or the file will be rejected.**
- **Column C [Dealer Invoice Number]** **Required** – Enter the homeowner's invoice number. **All rows associated with ONE REBATE must have the SAME homeowner invoice number.**
  - **Note:** If there are **TWO REBATES associated with the same invoice**, you will need to add a suffix to the Invoice Number so the system can find both rebates. For example, if you have two qualifying systems, add an "A" to end of the invoice for the indoor and outdoor for system #1 and a "B" to the end of the invoice number for system number #2.

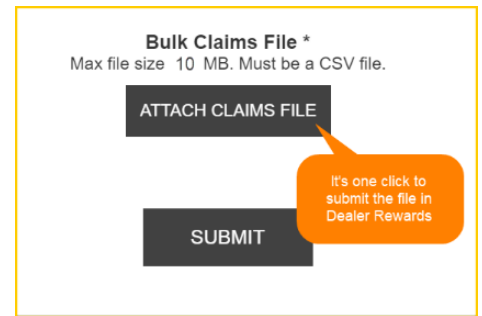
| Serial Number | Dealer Invoice Number* |             |
|---------------|------------------------|-------------|
| 2140548F2F    | 84407163-A             | } System #1 |
| 214765SAJG    | 84407163-A             |             |
| 21504MJ24F    | 84407163-B             | } System #2 |
| 21151RP91G    | 84407163-B             |             |

- Refer to scenario #2 below for an example

- **Column D [Sold Date]** **Required** – Provide the sale date to the homeowner in mm/dd/yyyy format
- **Column E [Installation Date]** **Required** – Provide the install date using mm/dd/yyyy format
- **Column F [Homeowner First Name]** **Required** – Provide the first name of the homeowner
- **Column G [Homeowner Last Name]** **Required** – Provide the last name of the homeowner
- **Column H [Homeowner Address1]** **Required** – Provide the street address of the homeowner
- **Column I [Homeowner Address 2]** **Not Required** – Use if needed for additional street address information
- **Column J [Homeowner City]** **Required** – Provide the city of the homeowner
- **Column K [Homeowner State/Province]** **Required** – Provide the state or province of the homeowner
- **Column L [Homeowner Zip Postal]** **Required** – Provide ZIP or postal code of the homeowner
- **Column M [Warranty/Other Item]** **Not Required** – Use column M **ONLY IF** a non-serialized product or warranty is eligible for the promotion. DO NOT enter any 10-digit serial numbers in column M, instead enter in Column B

Per the Sales Plan, invoices or Trane Limited Warranty Certificates are required as **proof of purchase**. To submit, please note the following:

- The invoice/LWC file should be in **.pdf format**.
- The file does not have a naming convention requirement: name it something that makes sense to you.
- File size limit is 10MB.



## Examples of Bulk Claim Submissions:

**Scenario #1:** Dealer Administrator wants to submit claims on behalf of RSPs at the dealership for all equipment sold and installed in January for the High Efficiency MBU SPIFF Program.

| RSP Username | Serial Number | Dealer Invoice Number* | Sold Date* | Installation Date* | Homeowner First Name* | Homeowner Last Name* | Homeowner Address1*   | Homeowner Address2 | Homeowner City* | Homeowner State/Province* | Homeowner Zip Postal* | Warranty/Other Item (use only if non-serialized items are eligible for promotion) |
|--------------|---------------|------------------------|------------|--------------------|-----------------------|----------------------|-----------------------|--------------------|-----------------|---------------------------|-----------------------|---|
| abbot573     | 21454UE3JG    | 64406216               | 1/6/2022   | 1/27/2022          | Richard               | Sanders              | 221 union pt rd       |                    | Stephens        | IN                        | 30667                 |   |
| dhamill23    | 21394TXF1G    | 64408473               | 1/7/2022   | 1/31/2022          | Charlie               | Dover                | 804 Brannon Dr.       |                    | Greensboro      | IN                        | 30642                 |   |
| dhamill23    | 20401U7P1F    | 64408473               | 1/7/2022   | 1/31/2022          | Charlie               | Dover                | 804 Brannon Dr.       |                    | Greensboro      | IN                        | 30642                 |   |
| JLW1335      | 214765SAJG    | 64407163               | 1/7/2022   | 1/27/2022          | Charlie               | Walters              | 230 Forest Hills Dr.  |                    | Watkinsville    | IN                        | 30677                 |   |
| JLW1335      | 214765SAJG    | 64407163               | 1/7/2022   | 1/27/2022          | Charlie               | Walters              | 230 Forrest Hills Dr. |                    | Watkinsville    | IN                        | 30677                 |   |
| JLW1335      | 2140548F2F    | 64407163               | 1/7/2022   | 1/27/2022          | Charlie               | Walters              | 230 Forrest Hills Dr. |                    | Watkinsville    | IN                        | 30677                 |   |
| abbot573     | 21504MJ24F    | 64407163               | 1/7/2022   | 1/31/2022          | Charlie               | Walters              | 230 Forrest Hills Dr. |                    | Watkinsville    | IN                        | 30677                 |   |
| abbot573     | 21151RP91G    | 64407163               | 1/7/2022   | 1/31/2022          | Charlie               | Walters              | 230 Forrest Hills Dr. |                    | Watkinsville    | IN                        | 30677                 |   |

Serial numbers for equipment in promotion, one serial number per row

**Scenario #2:** Dealer Administrator wants to submit **all sales in April that are eligible for both the SPIFF and the NCP**; the SPIFF payments should go to the RSP who made the sale and the rebate to the dealership.

| RSP Username | Serial Number | Dealer Invoice Number* | Sold Date* | Installation Date* | Homeowner First Name* | Homeowner Last Name* | Homeowner Address1*     | Homeowner Address2 | Homeowner City* | Homeowner State/Province* | Homeowner Zip Postal* | Warranty/Other Item (use only if non-serialized items are eligible for promotion) |
|--------------|---------------|------------------------|------------|--------------------|-----------------------|----------------------|-------------------------|--------------------|-----------------|---------------------------|-----------------------|---|
| JWiley       | 21454UE3JG    | 84406216               | 4/6/2022   | 4/19/2022          | Greg                  | Kordell              | 1311 PONDVIEW LANE      |                    | Indianapolis    | IN                        | 46259                 |   |
| JLW1335      | 21394TXF1V    | 84408473               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
| JLW1335      | 21401U7P1F    | 84408473               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
| JLW1335      | 2053DGAUBX    | 84408473               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
| abbot573     | 211014464L    | 84408486               | 4/7/2022   | 4/28/2022          | Marianne              | Cobb                 | 3521 Lambeth Crossing   |                    | Martinsville    | IN                        | 46151                 |   |
| abbot573     | 2048DGCYHX    | 84408486               | 4/7/2022   | 4/28/2022          | Marianne              | Cobb                 | 3521 Lambeth Crossing   |                    | Martinsville    | IN                        | 46151                 |   |
| JWiley       | 2140548F2F    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| JWiley       | 214765SAJG    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| JWiley       | 2132C0B4XX    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| JWiley       | 2051DGAX9X    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| JWiley       | 21504MJ24F    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| JWiley       | 21151RP91G    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |

Serial numbers for equipment in eligible in SPIFF and/or Rebate

**Scenario #3:** Dealer Administrator wants to submit **all sales in April that are eligible for both the SPIFF and the NCP**; the SPIFF payments should go to the owner of the dealership, who's Username is CPalmer70.

| RSP Username | Serial Number | Dealer Invoice Number* | Sold Date* | Installation Date* | Homeowner First Name* | Homeowner Last Name* | Homeowner Address1*     | Homeowner Address2 | Homeowner City* | Homeowner State/Province* | Homeowner Zip Postal* | Warranty/Other Item (use only if non-serialized items are eligible for promotion) |
|--------------|---------------|------------------------|------------|--------------------|-----------------------|----------------------|-------------------------|--------------------|-----------------|---------------------------|-----------------------|---|
| CPalmer70    | 21454UE3IG    | 84406216               | 4/6/2022   | 4/19/2022          | Greg                  | Kordell              | 1311 PONDVIEW LANE      |                    | Indianapolis    | IN                        | 46259                 |   |
| CPalmer70    | 21394TXF1V    | 84408473               | 4/2/2022   | 4/21/2022          | Mika                  | Patel                | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
| CPalmer70    | 21401U7P1F    | 84408473               | 4/2/2022   | 4/21/2022          | Mika                  | Patel                | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
| CPalmer70    | 2053DGAUBX    | 84408473               | 4/2/2022   | 4/21/2022          | Mika                  | Patel                | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
| CPalmer70    | 211014464L    | 84407163               | 4/7/2022   | 4/28/2022          | Marianne              | Cobb                 | 3521 Lambeth Crossing   |                    | Martinsville    | IN                        | 46151                 |   |
| CPalmer70    | 2048DGCYH     | 84407163               | 4/7/2022   | 4/28/2022          | Marianne              | Cobb                 | 3521 Lambeth Crossing   |                    | Martinsville    | IN                        | 46151                 |   |
| CPalmer70    | 2140548F2     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| CPalmer70    | 214765SAJ     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| CPalmer70    | 2132C0B4X     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| CPalmer70    | 2051DGAX9     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| CPalmer70    | 21504MJ24F    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
| CPalmer70    | 21151RP91G    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |

Enter the Owner's Username in the RSP Username column

**Scenario #4:** Dealer Administrator wants to submit **all sales in April only for the Spring NCP promotion**. The dealership selected the SPIFF Growth Benefit, however, each RSPs is responsible for submitting his or her own SPIFF claims.

| RSP Username | Serial Number | Dealer Invoice Number* | Sold Date* | Installation Date* | Homeowner First Name* | Homeowner Last Name* | Homeowner Address1*     | Homeowner Address2 | Homeowner City* | Homeowner State/Province* | Homeowner Zip Postal* | Warranty/Other Item (use only if non-serialized items are eligible for promotion) |
|--------------|---------------|------------------------|------------|--------------------|-----------------------|----------------------|-------------------------|--------------------|-----------------|---------------------------|-----------------------|---|
|              | 21454UE3IG    | 84406216               | 4/6/2022   | 4/19/2022          | Greg                  | Kordell              | 1311 PONDVIEW LANE      |                    | Indianapolis    | IN                        | 46259                 |   |
|              | 21394TXF1V    | 84408473               | 4/2/2022   | 4/21/2022          | Mika                  | Patel                | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
|              | 21401U7P1F    | 84408473               | 4/2/2022   | 4/21/2022          | Mika                  | Patel                | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
|              | 2053DGAUBX    | 84408473               | 4/2/2022   | 4/21/2022          | Mika                  | Patel                | 220 Highland Ave.       |                    | Fishers         | IN                        | 46038                 |   |
|              | 211014464L    | 84407163               | 4/7/2022   | 4/28/2022          | Marianne              | Cobb                 | 3521 Lambeth Crossing   |                    | Martinsville    | IN                        | 46151                 |   |
|              | 2048DGCYH     | 84407163               | 4/7/2022   | 4/28/2022          | Marianne              | Cobb                 | 3521 Lambeth Crossing   |                    | Martinsville    | IN                        | 46151                 |   |
|              | 2140548F2     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
|              | 214765SAJ     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
|              | 2132C0B4X     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
|              | 2051DGAX9     | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
|              | 21504MJ24F    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |
|              | 21151RP91G    | 84407163               | 4/11/2022  | 4/29/2022          | Brian                 | Foster               | 23 Sherburne Forest Dr. |                    | Carmel          | IN                        | 46033                 |   |

Leave the RSP Username column BLANK to suppress validation of any potential SPIFF claims; this ensures that the RSP will be able to submit a SPIFF claim with that same serial number

## Need Help with Bulk Claim Submission?

**Dealer Rewards Program Headquarters**  
Monday – Friday, 7 a.m. – 7 p.m., CT (excluding holidays)  
888-565-7628  
[ContactUs@ExperienceDealerRewards.com](mailto:ContactUs@ExperienceDealerRewards.com)