

# How to Submit a Claim in Max



1

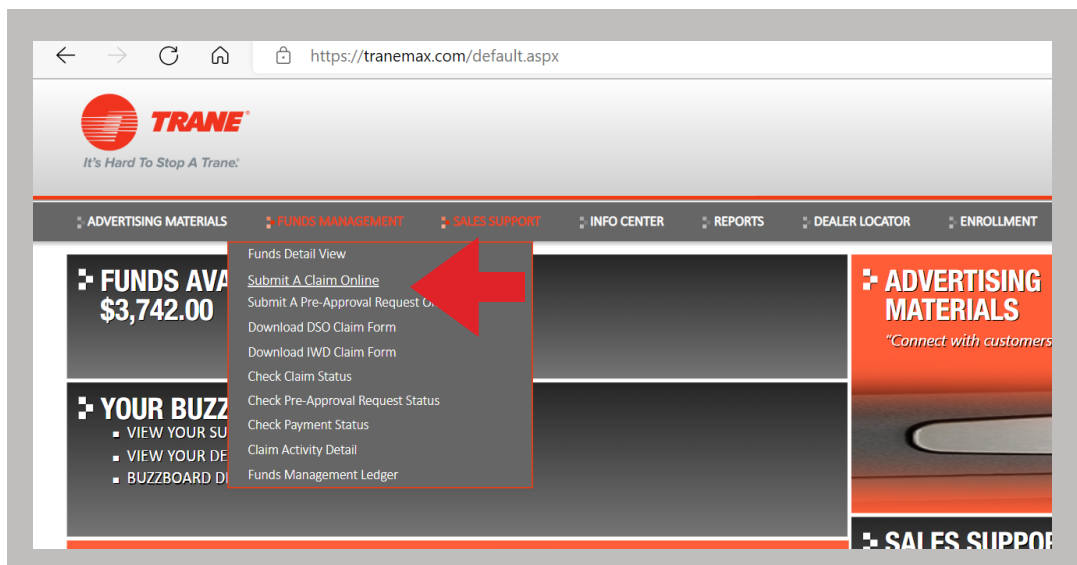
**Log into MAX through ComfortSite**

**Comfortsite> Marketing Center > Marketing Advertising Express (MAX)**



2

**Hover over Funds Management and select Submit a Claim Online.**



3

**Enter all activity information, then hit Next in the bottom righthand corner of the screen.**

Step 1: Enter Activity Information

Select Preapproval:

Select Sales Plan:

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:

Select an Expense Category:

Please choose an Expense Category

Select the prominent brand in the expense:

Select Fund:

Vendor Name:

Invoice #:

Invoice Date:

Invoice Amount:

Activity Date(s):

Add Date

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- 4 You will now need to provide Supporting Claim Documentation. Once complete, hit Next in the bottom righthand corner of the screen.

The screenshot shows the 'SUBMIT A CLAIM' form at Step 2: Supporting Claim Documentation. A progress bar at the top indicates four steps: 1. Enter Activity Information, 2. Supporting Claim Documentation (current step), 3. Preview & Submit, and 4. Confirmation. The main content area states: 'Claim #176758 has been created and will need the following documentation.' Below this, a list of required documents is shown: 'Copy of invoice', 'Photo of actual merchandise if preferred vendor is not used', and 'If ordered from PSG Geiger, no photo is needed'. There is a dropdown menu for 'Document Type' and a section for 'Select a Document to Upload' with a large dashed box and a red upload icon. Below this is a 'Free form document(s):' section with a text input field and an 'Add URL' button. A red asterisk indicates that the document type is required.

- 5 Preview your claim. After you preview your claim, hit Submit Claim. You will then receive confirmation that your claim went through.

The screenshot shows the 'Preview & Submit' screen. A progress bar at the top indicates four steps: 1. Enter Activity Information, 2. Supporting Claim Documentation, 3. Preview & Submit (current step), and 4. Confirmation. The main content area contains a warning: 'The "Submit Claim" button could result in a delay in processing your claim.' Below this, a message states: 'If you have not uploaded all documentation, please go back to step 2 and upload all required documentation.' There is a table with two columns: 'Invoice Number' and 'Invoice Date'. The table contains one row with the values '11111' and '11/8/2022'. To the right of the table is an 'Export to Excel' button. At the bottom right, there are three buttons: 'Previous', 'Add Another Activity', and 'Submit Claim'. A large red arrow points to the 'Submit Claim' button. The footer contains the copyright notice: '©Copyright 2013-2022 Trane. All Rights Reserved.'

Invoice Number	Invoice Date
11111	11/8/2022