

Trane Dealer Rewards Frequently Asked Questions

ACCESS AND REGISTRATION

How do I access Trane Dealer Rewards?

*Sign into **ComfortSite**, click on **Marketing Center**, then click on **Trane Dealer Rewards**.*

What if I am having trouble getting into ComfortSite?

*You can contact your Trane Distributor or Sales Office. You can also contact **ComfortSite Support** at 800- 430-5284 or by email at support@comfortsite.com.*

Who needs to register on Trane Dealer Rewards?

*Anyone submitting claims for Trane Promotions. Also, anyone who will be the recipient of SPIFF incentives must complete registration **before claims can be submitted** on his or her behalf.*

I see three roles in Dealer Rewards, which one do I choose?

- *The **Dealer/Principal role** is for owners/principals who want to submit claims for anyone at the dealership and have access to all claim activity for the entire dealership. A Dealer/Principal can also earn SPIFF incentives (if participating in a SPIFF plan).*
- *The **Dealer Administrator** has the same access as a Dealer/Principal, except that a Dealer Administrator cannot earn SPIFF incentives.*
- *A **Retail Sales Professional (RSP)** is anyone at the dealership who is eligible to earn SPIFF incentives. The RSP can only see his or her own claim activity in Dealer Rewards.*

What if I registered on Trane Dealer Rewards and picked the wrong role?

*You will need to have your role corrected by **Trane Dealer Rewards Support**. Contact them at 888-565-7628 or by email at ContactUs@ExperienceDealerRewards.com*

My company is participating in the SPIFF program and an administrator is submitting claims on my behalf. Do I still need to register on Dealer Rewards?

*You do. In fact, your Dealer Administrator will not be able to submit any claims for you **until** you are registered on the new Trane Dealer Rewards website.*

Why do I need to provide a Social Security Number (US) / Social Insurance Number (Canada) when I register on Trane Dealer Rewards? Is my information kept secure?

All Retail Sales Professionals and Owners/Principals are required to provide a tax identification number because SPIFF awards are treated as taxable income. We are required to report to income and provide you with Form 1099-NEC (US) / T4 (Canada) so you can prepare your income taxes. The security of all your personal information is our highest priority. All tax identification numbers are secured and never shared for any other purpose than federal tax reporting. Your tax information is not displayed on your profile and is not visible even by our Support Team.

I am the owner of the dealership, but we are not participating in the 2022 SPIFF Program. Our Dealer Administrator is already registered and will submit NCP claims on behalf of the dealership. Do I still need to register on Dealer Rewards?

No, since rebates are paid to the dealership and not the owner, you are not required to register if you will not be receiving any SPIFF incentives. The only reason you might want to register is to view claims reports for your dealership (coming in August 2022). Your Administrator will have access to those same reports as well. Also, some dealerships have Finance or Office Managers who want access to payment activity. Those individuals can register as Owner/Principals.

I participated in the 2021 SPIFF Program and already have a card. Do I need to register again? Can I use the same card from the 2021 SPIFF Program?

You must register on the new Dealer Rewards website in order to participate in the 2022 SPIFF Program. Registration only takes a couple of minutes. You cannot use your card from the 2021 SPIFF Program for 2022 SPIFF payments. We have a completely new Dealer Rewards platform and will issue new reloadable Visa cards to all 2022 SPIFF participants.

AVAILABLE PROMOTIONS

How do I know what promotions are available?

*View your current eligible promotions and earning information on your homepage and under the **Promotions** tab in the top navigation. You'll also receive emails for promotions your dealership is eligible to participate in. PLEASE NOTE: **you will NOT see eligible promotions on your homepage until 5/26/2022**, when we open the website for claim submission in Trane Dealer Rewards.*

What if I am not seeing a promotion that I am eligible for?

*If you do not see your eligible promotion(s) **on or after 5/26/2022**, please contact Trane Dealer Rewards Support at 888-565-7628 or by email at ContactUs@ExperienceDealerRewards.com.*

CLAIM SUBMISSION

Can someone else submit claims on my behalf?

Absolutely, a designated Administrator at the dealership may submit claims on behalf of a Retail Sales Professional (RSP) or the owner/principal of the dealership. Note: Dealer Administrators cannot earn SPIFF incentives.

How do I submit a single claim?

1. Access Trane Dealer Rewards (ComfortSite >> Marketing Center)
2. Select the **Submit a Claim** button on your homepage.
3. On **Products Installed**, enter the following required information:
 - Sold Date
 - Installation Date
 - Serial Number of Equipment (the site will populate the model after)
 - If you have additional equipment related to the Homeowner sale and eligible for a promotion, click **Add Another Product** and enter additional serial numbers
 - Click **Next** to proceed
4. On **Your Promotions**:
 - If your products are eligible for promotions, you'll see these listed
 - If the sale is eligible for a SPIFF Promotion and you are submitting claims on behalf of someone else, indicate who is the recipient of the SPIFF reward; if you do not indicate a SPIFF recipient at this time, the serial numbers can still be claimed for a SPIFF reward at a latter date (claims submission deadline still apply)
 - If no promotions for your products were found, you can double check your information or finish the claim and request an exception. Please allow up to two weeks for review of exception requests.
 - Click **Next** to proceed
5. On **Sale Details**:
 - Enter the Invoice or Trane Limited Warranty Certificate Number
 - Attach Proof of Purchase Homeowner Invoice or Trane Limited Warranty Certificate
 - Enter Homeowner Information (first and last name, address, city, state/province, and zip code)
 - Click **Next** to proceed
6. On **Review Claim**:
 - Review and click Previous if you need to make any changes, or
 - Click **Submit**
 - You can **Submit Another Claim** or click **Exit** to return to your homepage

Can I submit claims in bulk? Is there a minimum number of claims required in order to use the bulk submission process?

Anyone who is registered on Trane Dealer Rewards can submit claims one at a time or using the bulk submission process. Pre-approval for bulk submissions is not required. You decide when a bulk submission best meets your needs. There is no minimum requirement for the number of claims that can be submitted in bulk.

How do I submit a bulk claim?

Select **Submit Bulk Claims** from your homepage, then **use the Dealer Rewards Bulk Claims Submission Template** to submit multiple claims at once. Review the **Bulk Submission Instructions** to ensure you complete the template correctly; the bulk submission file will be rejected if there are ANY errors. Note: The file must be submitted in .csv format: an Excel file will not work.

Do I need to provide proof of purchase when I submit claims?

*Yes, proof of homeowner purchase is required for all claims, whether submitting claims one at time or in bulk. You can attach a **Homeowner Invoice** or a **Trane Limited Warranty Certificate** with the claim. If you are submitting claims in bulk, please submit one .PDF file of all the Invoices/Warranties associated with the claims.*

How long do I have to enter claims?

*Every promotion has a claim submission deadline. Check the individual promotion details under the **Promotions** tab, or you can refer to the Sales Plan for the promotion submission deadlines.*

What if the serial number I am entering has already been claimed?

Double check the serial number. If you believe it is correct, complete the claim and request an exception. Please allow two weeks for exception decisions to be rendered.

Can I resubmit a claim that was declined?

Yes, but you will need to submit it as a new claim and provide corrected information or submit it and request an exception.

What is an exception?

Trane may grant exceptions under certain circumstances, (e.g., a claim was declined as a “duplicate serial number”). If you believe a claim was declined in error, you may request an exception during claim submission. You need to provide a reason for your exception request, and we recommend providing your Account or Territory Manager’s name to speed up the review process. Trane will review your request and provide you with a decision. Please note that an exception request is not guaranteed. If an exception is declined, you will receive an email notification. Approved exceptions are included in the weekly Paid Claim Activity Report. Please allow two weeks for a decision on any exception request.

Can I use the bulk submission template to submit an exception request?

No, all exception requests need to be submitted in Trane Dealer Rewards one at time.

REBATE PAYMENTS

What is the cut-off time each week for having approved claims paid out by Thursday?

Rebate claims must be in approved status by 12:00 p.m. Central Time on the Wednesday before to be paid on the following Thursday.

How will I know if my rebate claim has been paid?

Rebate claims are processed weekly and paid via a credit memo. DSO dealers will see a credit via Accounts Receivable. IWD Dealers receive their payment directly from their Distributor. Starting in August 2022, all paid rebate claims will have a credit memo number added to the claim in Trane Dealer Rewards after the claim is paid for easy tracking and reconciliation.

SPIFF PAYMENTS

What is the cut-off time for submitting SPIFF claims in order for them to be on Thursday?

*All SPIFF claims must be in **approved status** before **Thursday at 12:00 p.m. Central**. We will start paying all approved SPIFF claims on Thursdays at 12:00 p.m. Central, and payments will be automatically added to Visa Cards that afternoon. Any approved claims that miss the Thursday cut-off time will be paid the following Thursday.*

How do I get my Visa card for the new program?

*Your Visa card will be ordered for you on **the first date you earn a SPIFF payout**. When it is mailed to you, it will come loaded with your first payout amount. Please allow 4-7 business days for your Visa card to be processed and mailed.*

What do I do if I do not receive my card after 7 business days?

You can call Trane Dealer Rewards Support at 888-565-7628 or send an email to ContactUs@ExperienceDealerRewards.com. You can even use Chat on the Trane Dealer Rewards website.

How do I add SPIFF awards to my card once I have it?

Any SPIFF awards earned will be added to your Visa card on a weekly basis, on Thursdays.

How can I track my Visa card earnings and claims?

You can track your card earnings and claims on your Dealer Rewards homepage. For more card details, visit AwardCardServices.com/Prepaid or download the "My Award – Award Card Services" app from Google Play or the Apple App Store.

I participated in the 2021 SPIFF Program and already have a card. Can I use the same card from the 2021 SPIFF Program for my 2022 rewards?

No, we have an entirely new Visa card company and will need to issue new Visa cards to all 2022 SPIFF participants.

Is the Visa card from the 2021 SPIFF Program still valid?

Yes. If you have any available funds on your card from 2021, those are not impacted, and your card is still valid until the card's expiration date. We encourage anyone with a card from the 2021 SPIFF Program to use all funds prior to the card's expiration.

Will my NEW Dealer Rewards Visa card for the 2022 SPIFF Program expire?

Yes, as is typical of all Visa cards, your new Dealer Rewards Visa card will include an expiration date. When your card is expiring, you will be issued a new card loaded with your rewards.

HOMEPAGE AND REPORTING

How often will the information on my homepage be updated?

After 5/26/2022, claim details are updated in real-time, however, earnings are updated on the homepage weekly on Thursdays.

How do I change my email or physical mailing address for Trane Dealer Rewards?

*In the upper-right of the Trane Dealer Rewards screen, click on the round icon with your initials or avatar, then click on **Update Profile**. You can update any profile information except your Role. Make sure to click **Save**.*

If I am a Dealer Administrator or Owner/Principal, will I be able to see which RSPs are registered on Trane Dealer Rewards?

You will, but not until later in 2022. We will release this and other features on the website throughout the year. You will be notified by email when new features are ready. If you have any questions, please feel free to Chat, Email or Call Trane Dealer Rewards Support at 888-565-7628 or by ContactUs@ExperienceDealerRewards.com.

Why does it matter if my email or physical mailing address is out of date?

Here are four great reasons to keep your Trane Dealer Rewards address current:

- 1. We will use your Trane Dealer Rewards email address to send you communications at the start and end of promotions. These reminders will help you stay on top of promotion deadlines!*
- 2. We will email you a "this week's Paid Claims Report" in those weeks where you/your dealership received a payout, so you won't have the look up results if you don't want all the details.*
- 3. If you submit an exception request and your request is declined, we will email you right away. Approved exceptions will show up in your weekly Paid Claims Report.*
- 4. Finally, when tax time rolls around, if you have taxable SPIFF income, you will receive a proprietary link to your Form 1099-NEC (US) / T4 (Canada) by email and a paper copy will be mailed to the physical address on your profile. Every year we have a few sales professionals who do not receive their 1099s/T4s because we did not have their current email and/or physical mailing address.*

RESOURCES AND HELP

Where should I go first for service related to Trane Dealer Rewards?

*If you have any questions, please feel free to Chat, Email or Call **Trane Dealer Rewards Support** at 888-565-7628 or by ContactUs@ExperienceDealerRewards.com. Service is available Monday through Friday from 7 a.m. – 7 p.m. Central.*

Where can I find additional information and training on Trane Dealer Rewards?

Check out the [Trane Dealer Rewards Quick Start Guide](#). You will find instructions and links to additional resources all in one place. And, we will be adding video demonstrations in June!