

Navigating Source

Need to help navigating the Source portal? Please review this document to learn the basics of Source.

For additional information, articles, and videos, simply type what you are looking for in the search box on the Source website or click on [Submit a Request](#) to ask one of our knowledgeable and friendly Source Support associates.

Source Partner Portal

Ordering Parts & Equipment



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Ordering Options



Option 1: sourcepartnerportal.com

The Source portal can be found on the ComfortSite home tab. The system has been updated for inventory and pricing accuracy and the tracking tool is a vast improvement from anything we've ever had. Please visit the website for additional training videos.



Option 2: Emailing directly to Customer Service (rs.dealerorders@trane.com)

You will need to provide them with the following information: Company name, account number, po number, will call location or shipping to shop, model numbers you wish to order, and any promos/quotes you would like applied to your order.



Option 3: 1-800-AC-TRANE [1-800-228-7263]

For the most flexibility, our Customer Service Representatives are available for you from 7:30 AM until 6:00 PM CST. You can place or track orders directly with representatives from wherever you are. You can verify pricing and get additional help with systems and equipment options.

Overview of Source

What is Source?

Source is Trane Technologies' new one-stop B2B digital platform. Its mission is to deliver the best customer experience for our customers-enabling you to easily, consistently, and seamlessly find, buy, and pay for our products, and to manage your businesses with RSHVAC & Supply.

- Source will eventually replace ComfortSite and Trane360 for the Residential operating unit only. This will be a multi-year transition, and plenty of communications will go out regarding the time frames and changes.
- Source is not a 1:1 duplication of ComfortSite content. We are focused on the tasks and jobs users are trying to complete and need, and will continue to add new solutions and applications in Source.
- Customer and user experience input will validate and drive our development priorities.

How to Check Out

- Go to Source Partner Portal
- Type in the item you're looking for, EX:"TEM4A0C61M51SA"



What are you looking for today?

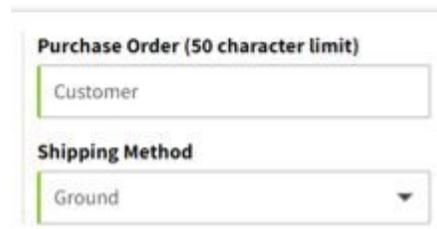
Current Parts and Equipment | Description of Product, Drawing, Vendor Number | Search

- Click on Search
- Click on **View Availability** (this allows you to see if the item is in stock at a certain location, or back ordered)



- **See the item you need in stock?** Type the quantity under the location you want the item from. This will also show you how many are available.

- Click on Add to Cart
- Click on Go to Cart



Purchase Order (50 character limit)

Customer

Shipping Method

Ground

- If you need to change the pickup or delivery location, adjust here



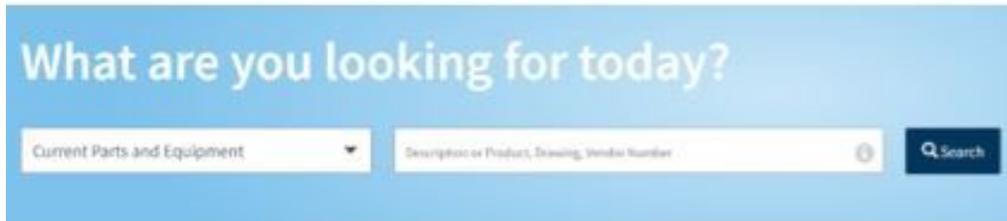
410
; DISCHARGE AIR TEMPERATURE SENSOR FOR
om: GAINESVILLE PARTS SUPPLY

▼ | Change Location | Remove

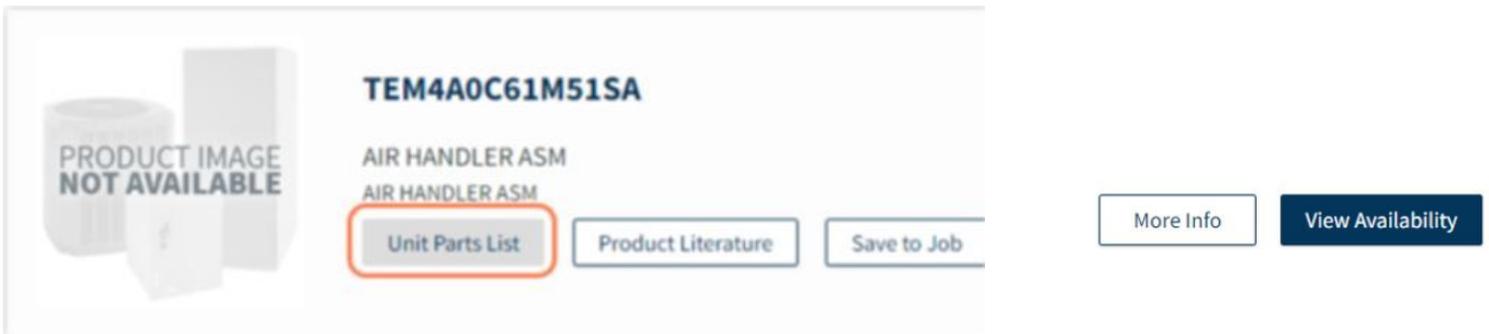
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Searching for Items on Source

- Go to Source Partner Portal
- Type in the item you're looking for, EX:"TEM4A0C61M51SA"



- Click on Search
- You can view the parts list and availability for that item



- For the parts list, view the description applicable to your order

Back

TEM4 - CONVERTIBLE AIR HANDLER
TEM4A0C61M51SAA

Unit Parts List

Ref#	Description
*	ALL PARTS >
*	BLOWER >
*	CABINET >

- For the parts list, view the description applicable to your order

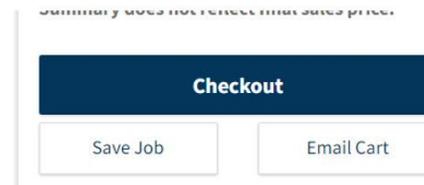
My Stores All stores with T6031A1011 in stock Search Near Me

Show only locations where T6031A1011 is in stock

Showing stores near 28214 [Search]

How to Check Out

- **Click on Checkout** Not ready to checkout? You can save this to a job or email the items from the cart for future purchases.



- **Select Payment Type**

Payment Information

Discounts for payment type only apply to equipment

Payment Type

- **Fill out all Contact Information**

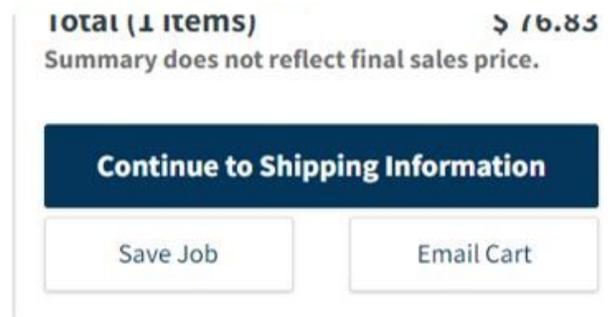
Contact Information

Email

Name

Phone

- **Click on Continue to Shipping Information**



- **Review your order**
- **Place Order**

Search & Pay Invoices

- Go to ComfortSite
- Financial Center
- Invoice Management



- Search by invoice type, time period, status, or parts/equipment account



- You can select the invoices you want to pay
(a total will show at the bottom where you have the options to pay or view those invoices)



- **Make a Payment** This screen will show you which invoices you selected and allows you to select a payment method.



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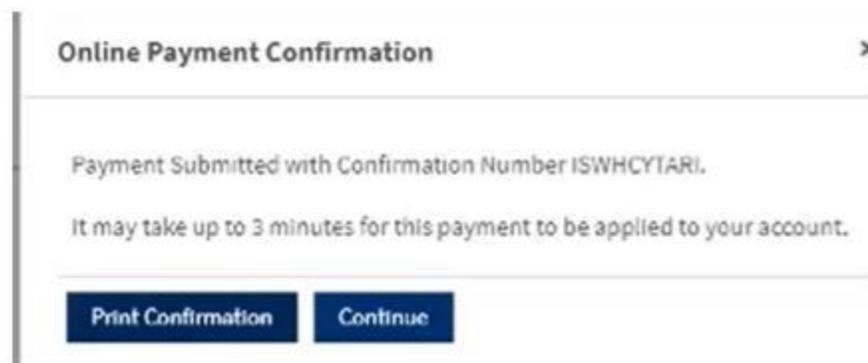
- After you select the payment method, select "Make a Payment"

Payment Total: \$ 5,596.80

Cancel

Make a Payment

- A Payment Confirmation will show



- **Account Details**

- Statement details
- Bank Account Information
- Payment History

