Field Service Representative Playbook

Function & Processes

FieldTechHelp.com

FSR Playbook

Purpose

To provide information regarding the Field Service Representative (FSR) team, their functions, opportunities, and processes. The Playbook does not provide every scenario the business or dealers will encounter, but it addresses the most considerations. The Playbook contains topics of need and interest to our associates and dealers.

Introduction

The local Dealer Sales Office (DSO) FSR team is a phone based technical support resource for dealers and techs in the field. They are available Monday thru Friday from 8am to 5pm.

Callers can request to speak to individual FSR's but should know that the requested FSR may be assisting another caller or out of office and may need to return the call when available.

When calling the tech support line Technicians should provide their name, company name, and both indoor and outdoor serial numbers for split systems or model and serial of the Light Commercial Units (LCU) up to 25 Tons.
***Please note that FSR team can only support LCU product that has been purchased through the dealer sales office and not product purchased through the Commercial Sales Office (CSO). **

Reach out to your local Account Manager for local FSR contact Information.

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Field Service Rep (FSR) Engagement

Our Dealers can engage with FSR's via phone as the primary method of contact, by email and in the form of a site visit. In many cases our Dealers jump to a site visit prior to establishing a valid need, and are reacting to a situation or circumstance, rather than the necessity for technical assistance.

Best Practices

- Involve the FSR upon the second or third (at the latest) Visit or communication with the consumer
- Have the proper tools and time to diagnose the problem.
- Gather necessary information, followed by an email with detailed diagnostics to share with FSR.
- Consider the FSR team as a tool, like any tool if used properly, the results are as expected, if used incorrectly the intended action is far from the desired result.

Contact your Account Manager for your local Dealer Sales Office FSR contacts information

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Field Resources

Self-Service

At Trane we provide multiple Self-Service options to assist our dealers aside from support from our FSR's:

FieldTechHelp.com

Technicians in the field have access to fieldtechhelp.com directly. They simply select TRANE, and they are in. No Login or password required. This resource is also linked to our service guides. If a technician sees a QR code on the page, it will take them directly to the video associated with the page and diagnostics.

Learning Management System (LMS) on ComfortSite

A portal to source information, training and tools via ComfortSite. This Portal houses thousands of eLearning courses available to you and your employees. Access to ComfortSite must be granted to the user by the dealer or company administrator. FSR's cannot provide access. Contact your Account Manager to help facilitate this request. LMS is located on Comfortsite on the Main page left menu under "Training Center". Once on that page, Click on "Trane LMS-Single Sign on" to view and search the Catalog.

Technical Training

The FSR Team provides two opportunities for technical training each year. First training is considered "Spring Training" and typically begins in the month of February. The second training is "Fall Training" and typically beings in October. For Specific times and dates, please source that calendar through your Account Manager.

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Site Visits

The FSR team recognizes that a site visit may be necessary on occasion and has created a process which provides the best opportunity to assist, while maintaining a level of service for all dealers and callers. Please familiarize yourself with this process and secure the appropriate data sheets. **These data sheets are a useful resource to commission new installations or determine the current state of operation, providing ALL DATA requested is collected.**

- FSR Lead approval required prior to scheduling a Site Visit
- Contact the local FSR directly (preferably by email) to maintain an accurate record, a ticket will be created to log data.
- Return a completed data sheet for review prior to consideration of site visit. The specific data sheet will be provided during initial FSR contact based on identified equipment.
- FSR will provide a date or dates of availability based on schedules.

Please Note:

- Site visits ARE NOT associated with APPLICATION, INSTALLATION, or ANY OTHER EXTERNAL SOURCE OR INFLUENCE. This can be billed back to the dealer at the same rate associated with current Field Repair invoice (FRI) rates.
- FSR’s DO NOT perform tests or provide tools while on site and MUST be accompanied by the dealer. A technician on site from your dealership will perform all tests associated with the data sheet to validate the previously provided results.

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Site Visits

Consumer Complaints

Site visit requests associated with a consumer complaint should be directed thru **Consumer Relations** department at **800-945-5884**. If it is determined a site visit is required, the FSR will contact the dealer.

Here are some key phrases dealers can tell their consumers to use when calling into Consumer Relations. Callers should have both models and serials ready to present to the answering agent.

*"**My dealer has been working with their sales office/technical support and they directed me to Consumer Relations for some additional support, I would like to speak with someone regarding the issues I have had with my product.**"*

*"**My dealer's technical support provided this phone number to me as a place to request additional support in resolving my concerns, I would like to speak with someone about the issues I have had with my product.**"*

The consumer should **NOT** call in requesting a site visit, an FSR will not be able to schedule one for them and this will most likely result in redirecting the consumer back to their dealer. If a consumer is wanting to speak with Trane, please direct them to the Consumer Relations Department or you, the dealer, can speak with an FSR on their behalf to see about scheduling a site visit IF needed.

As a best practice, a dealer should communicate issues or concerns upon the first or second visit to minimize or eliminate the potential for unnecessary escalation.

We are aware exceptions will occur and those cases will be evaluated on an individual basis.

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Requesting Labor Consideration

While the “Dealer Agreement” includes a dealer’s responsibility of labor, we do understand that there will be cases in which a dealer will submit a request. These are considered and managed on a case-by-case basis according to the information provided by our dealer partners.

This may include a few requests from the FSR team:

- Images (picture or video) that represent the condition.
- A completed FRI (Field Repair Invoice) that can be provided by your Account Manager or FSR. ***Our FRI must be returned in the Excel format as it is provided and must be typed. They cannot accept handwritten FRI documents***.
- A dealer repair invoice may also be required to show that the consumer was not billed for the repair. If requesting and accepting labor from the factory, consumers shall not be billed for that repair. ***Please note that your warranty part must be processed and appear in WMS (Warranty Management System) before an FSR can submit for labor.***

If you need additional information regarding a specific request, please email your local FSR team.

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Equipment Issues at Start Up

If a dealer identifies a mechanical or operational problem at start up, they should immediately contact the FSR team WHILE ON SITE. **Unless assisted by an FSR to process a case a dealer should not make the decision alone to replace a piece of equipment, as it may result in a denied credit.** We have a team of FSR's who can provide detailed direction and facilitate the necessary action, which may include replacement, or other options. **CONTACT FSR TEAM WHILE ON SITE IF POSSIBLE.**

Damaged or Missing Parts

Inspecting the unit prior to installation is critical, as damage and shifting can occur during transportation and handling of the product. In the unfortunate event that damage or missing parts occur please follow the below options.

NOT USABLE CONCEALED DAMAGE/ VISIBLE DAMAGE

- Contact your **Local Dealer Order Management Team** for a Return and replacement order.

USABLE DAMAGE – able to Install just needs repair or replacement part

- Contact Qwik Fix Department at **800-449-4682** or email QFMBox.StLouisCCE@trane.com
- You can also order the damaged replacement part through local supply store. Make sure to take pictures of the Model and serial # plate of the unit, as well as any pictures that relate to the damages. Send a copy of the replacement part invoice and pictures to QFMBox.StLouisCCE@trane.com to request a **DAMAGE ALLOWANCE CREDIT** for the replacement for the damaged part.

MISSING PARTS

- Contact Qwik Fix Department at **800-449-4682** or email QFMBox.StLouisCCE@trane.com
- You can also order the missing part through local supply store. Make sure to take pictures of the Model and serial # plate, as well as any pictures that relate to the missing part. Send a copy of the replacement part invoice and pictures to QFMBox.StLouisCCE@trane.com to request a **DAMAGE ALLOWANCE CREDIT** for the replacement missing part.

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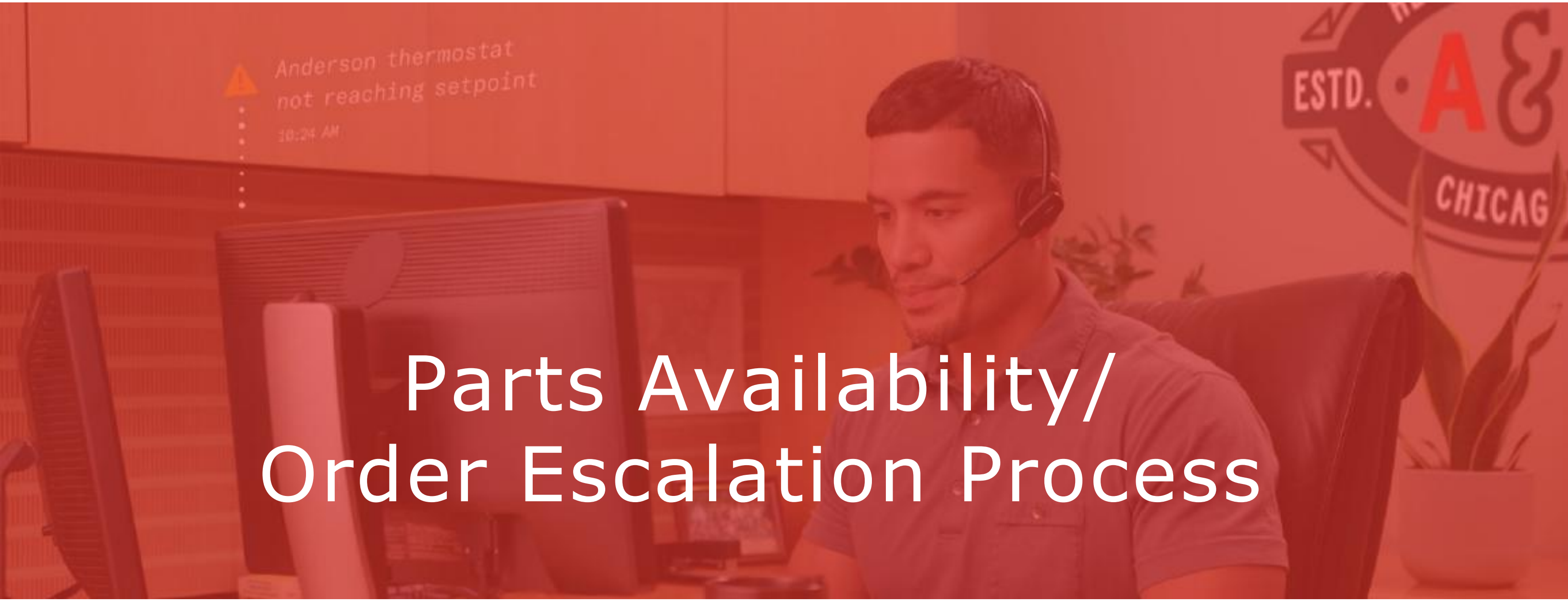

Parts Availability/ Order Escalation Process

If calling to secure part(s) and an associate indicates the part is not within the company supply chain or there is an extended lead time, **you still must place the order for the part and ask the associate to "ESCALATE". Do not call your Account Manager or the FSR.** Our parts associates have a specific process that requires the order to be placed and instructions to collect specific data, which they share with the FSR team, to provide additional assistance. **If the order is not placed, it delays the opportunity to assist our dealers in getting a solution as quickly as possible. Please provide the following Information to assist in expediting the part.**

- Account Number
- Homeowner Information (Name, Address , Phone)
- Equipment Serial #
- Part Number

With this information the associate will be able to engage with our Order Management Team and FSR to create a case for the factory. This is submitted for a review and the factory can contact the assembly plant, vendors, etc. to approve the request or make the necessary part arrangements. **If the part is still not able to be escalated using this process, work with your local Account Manager to assist with alternate options.**

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Quality Reporting

Quality of our equipment is very important to us and a standard we like to upkeep. Without the help of field communication from our partners, we wouldn't know what we need to improve on.

If you observe or identify an issue with the product quality in the field, please report your findings to the FSR team. If able, please provide the following information:

- **Model/ Serial #**
- **Description of quality issue.**
- **Images (picture or video) that represent the condition**

With the above information we can properly engage with the correct factory personnel. This is a critical step in correcting and preventing issues from becoming systemic. In some cases, our dealers may be the first to recognize the problem, so the earlier we can communicate the findings, the more positive the outcome.

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Equipment Exchange Authorization (EEA)

Trane Comfort Specialist(TCS) Only

Warranty/Product Exchange (EEA) – First 90 days

TCS dealers have the authority to replace outdoor split/packaged units, furnaces and air handlers when faced with major system leaks, compressor or heat exchanger failures do to manufacturing defects **within the first 90 days after installation/startup date. **RunTru, Ameristar and Trane-Mitsubishi are not eligible for this benefit Warranty/Product Exchange Process.**

To process the request, we require a completed FRI, a copy of replacement equipment invoice, the physical failed unit label and image (picture) if a coil leak or a detailed explanation of the failure.

Any request beyond the 90-day or NON-TCS EEA

This request will be subject to the below process for consideration. A request for an EEA must be accompanied with supporting data and documentation and will be submitted to the factory. **FSRs do not approve or decline requests, they are facilitators and advocates on behalf of the dealers and consumers.**

Dealers should engage with the FSR via an email describing the details (models, serials, condition, or reason). The FSR may require a fully completed data sheet as well as images and or other documents to support your request. The FSR will take the collected data and create a "Case" on behalf of the consumer. The FSR will communicate that case number to the dealer and submit the request to the factory. The information will be reviewed at the factory and upon conclusion will notify the FSR of the outcome.

Again, please understand that the FSR is an advocate, and the more and complete information that is provided to support your request, the better the outcome. FSRs request data to support requests, not to delay or prevent any action.

Do What's Right (DWR)

The Do What's Right is a sales program offered to Trane Comfort Specialist dealers if they select it. The details of this program should be discussed with your Account Manager and is submitted through Comfortsite under the "Marketing Center" then selecting Marketing Advertising Express (MAX). Your Account Manager can guide you on your request submission. Once Submitted, it will be routed to an agent for review, validation, and processing. You will receive Automated system updates for your records.

DO What's Right Guidelines

Warranty Product Exchange - Products must be installed in a residential application. *Ductless and 3 phase products are excluded.*

Charitable Opportunities: *Ductless and 3 phase products are excluded.*

Utilize Benefits Throughout the Year: Don't delay using your benefits until the end of the year.

Please Note:

- Do What's Right is an exclusive opportunity offered to our **TCS Dealer Partners**
- **THESE REQUEST ARE NOT SUBMITTED TO OR BY THE FSR TEAM.**
- Process must be followed to receive Credits, - For More information see Do What's Right Resource Center
- All claims must be submitted within 90 days of the Trane invoice date,

or by December 1, whichever comes first.

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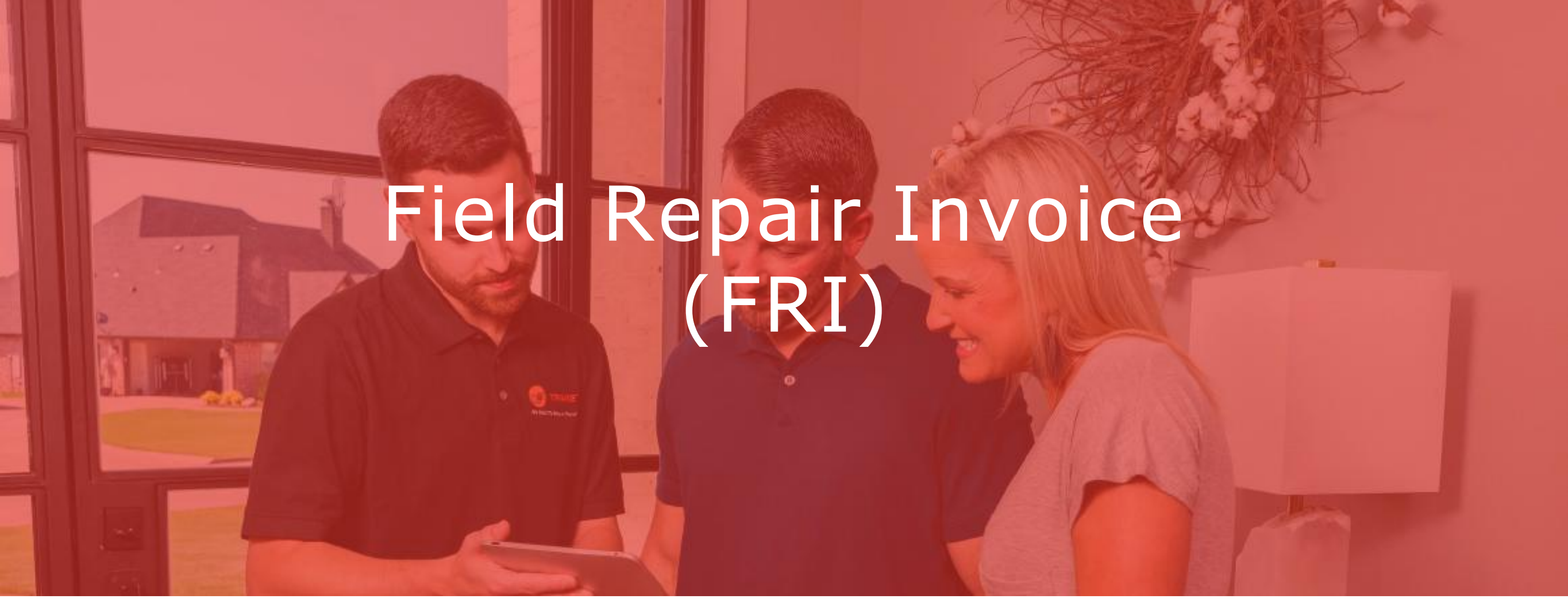

Field Repair Invoice (FRI)

Within the first 30 Days of repair date an FRI will need to be completed and submitted to your Local Field Service Representative.

They will provide a claim number that begins with the letter “C” (Example: C-12345678). This claim number will be required in order to provide the status of your claim and share the corresponding credit memo number if finalized as “Accepted and Closer”.

Needed Information

Dealer Information

- Name & Address

Customer Information

- Name & Address

For an FSR to submit a labor request the warranty part claim (WCR) must be processed and appear in Warranty Management System (WMS) as “Accepted and Closed”. This is no consideration for labor on parts claims that have been “Denied and Closed” through WMS.

Description of Work Performed, reasons for consideration for amount requested

Original Product Information

- Model #, Serial #, Start Date, Fail Date, Repair Date

Replacement Product Information

- Model #, Serial #, Start Date, Invoice #

Any Sublet Information

- Refrigerant (LBS), Refrigerant Price

When requesting labor consideration, The FSR team has made it their goal to submit all requests within one week of the date they are received.

Contact your Account Manager for your local Dealer Sales Office FSR contacts information and a copy of an FRI Form.

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Product Registration & Warranty

While the FSR does assist in many capacities, they are not able to aid with product warranty or make changes to any existing warranty terms or conditions. If you experience an issue with product registration or warranty status, please reach out the resources below.

Residential Limited Warranty Call Center
877-872-6303

Product Registration Call Center
855-260-2975

Product Registration Email
product.registration@concentrix.com

Register Online
Visit Warranty Registration | Register a New Product to get started!

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XV Drive Authorization Process

All info required to obtain drive Authorization Number

Drive Failure within Office Hours

XV-unit Inverter Drives require an FSR to provide an authorization number for our dealers to process a warranty part credit request. During normal hours of support the technician will call their local FSR support line, provided from their Account Manager, and speak directly to an FSR. The FSR will require specific data from the Technician **while on site**, so that a case can be created, and an authorization number provided.

Drive Failure Outside of Office Hours (After Hours)

If a drive failure occurs outside of tech support normal business hours (after hours) an editable document has been created to capture all the required information. Please email an FSR from your local contact list to secure this document.

Please Note: While the document was created to assist our dealers after hours, it can and should be used in any request for a drive authorization, as this will be all the information requested while on a call with an FSR. Having this information collected prior to calling the FSR team will expedite the call and authorization process.