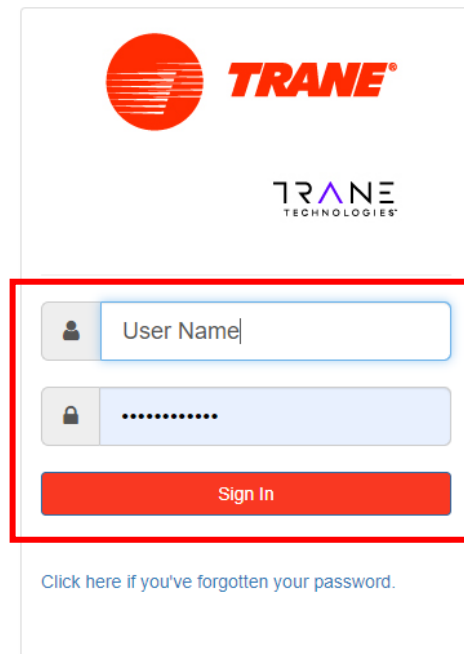


# Instructions for Online Warranty Credit Request (WCR) Through ComfortSite

1. Login to ComfortSite Account with User ID and Password.



The login form for Trane Technologies is displayed. It features the Trane logo at the top, followed by the text "TRANE TECHNOLOGIES". Below this, there are two input fields: "User Name" and a password field (indicated by dots). A red box highlights the "User Name" field, the password field, and the "Sign In" button. Below the "Sign In" button, there is a link that says "Click here if you've forgotten your password."

2. Select Warranty Center on from the Navigation pane to get to the WCR Menu.
3. Warranty Center Menu:
  - a. **Warranty Credit Request Instructional Video:** Interactive Training Video on how to use the WCR form and Search Functions.
  - b. **Warranty Credit Request Instructions-PDF:** Written instructions of how to use the WCR form and Search Functions.
  - c. **Warranty Credit Request (WMS) Form:** New WMS Warranty Credit Request Form (Page 3)
  - d. **Warranty Credit Request (WMS) Search:** New WMS WCR Search with Claim Status (Page



The screenshot shows the "Warranty Center" page. On the left is a navigation pane with a list of menu items: Order Center, Parts & Supplies, Financial Center, Marketing Center, **Warranty Center** (highlighted with a red box), Training Center, Product Info, Tech Support, and Admin Center. The main content area is titled "Warranty Center" and contains two sections: "Equipment" and "Parts". Under "Equipment", there is a link "Help Reading Serial Numbers" with a question mark icon. Under "Parts", there are four links: "Warranty Credit Request Instructional Video", "Warranty Credit Request Instructions-PDF", "Warranty Credit Request (WMS) Form", and "Warranty Credit Request (WMS) Search", each with a question mark icon.

## Warranty Credit Request (WMS) Form

2. Service Information:
  - a. Dealer Information will auto-populate based off user's ComfortSite account
3. **Work Order Number(PO#):** This is the Purchase Order Number you want to assign or was assigned to the order for the parts
4. **Claim Information:**
  - a. **Part Replacement:** A replacement part needs to be purchased for the unit to get it back up and running.
  - b. **Credit:** A replacement part has already been purchased and a credit is needed.

### Service Information

Name:	ABC DEALER
EC Customer ID:	1234567
Address:	1180 Seven Seas Drive
City, State, Postal Code:	Lake Buena Vista, FL 32836

Work Order Number(PO#): *	<input type="text"/>
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### Claim Information

Claim Type:	<input type="radio"/> Machine <input checked="" type="radio"/> Part Replacement <input type="radio"/> Invoice Credit
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1. **Product Information:**
    - a. **Product Serial Number:** Serial number of the unit, Serialized Thermostat or Accessory.
      - i. **Note:** If unit still has a valid warranty- please enter the unit serial number.
      - ii. **Note:** System will use auto-fill feature as you start typing the serial number. Please select the correct serial number as it starts to populate or type the complete serial number.
    - b. **Model Number:** Model Number will populate once serial number is entered.
      - i. **Note:** If serial number is invalid, a model number will not populate.
    - c. **Sales Order Number:** Enter the Sales Order number for a part that was purchased outside of a unit warranty and failed within a year.
      - i. **Note:** If the order number is from P21 or Oracle, it will auto populate and allow you to select the part number.
- \*\*\*Note:** Only one piece of equipment or sales order number can be filed on a WCR at a time. You cannot file multiple units or part warranties on the same WCR/Claim.\*\*\*
- d. **Failure Date:** Date of failure on the part/unit.
  - e. **Fault Location:** Reason for failure
    - i. **Note:** A list of fault codes can be found by clicking on "List of Fault Codes" link. If you are unable to find your fault cod, please enter "Other" and descript the failure on in the Special Notes section at the end of the claim.

### Product Information

Product Serial Number: *	<input type="text"/>
Model Number:	<input type="text"/>
Sales Order Number: *	<input type="checkbox"/>
Failure Date: *	<input type="text" value="MM/DD/YYYY"/>
Fault Location: *	<input type="text"/> <input type="button" value="List of Fault Codes"/>

5. **Equipment Location:** If a unit is registered, the address will auto-populate in the fields below. If it is not registered, please only enter in the Homeowner Name.

- a. **Name:** Homeowner Name or Company Name that the equipment is located.
- b. **Address:** Physical Address of Equipment
  - i. **Note:** If you enter in the address, select City, State, and Postal Code first. This will help you narrow down the auto-fill assistance in the Street Address field.

\*\*\*If the address fields are grayed out, the information is not needed.\*\*\*

#### Equipment Location Information

Name : *	<input type="text"/>
Address Line 1 :	<input type="text" value="Enter Address Line 1"/>
Address Line 2 :	<input type="text" value="Enter Address Line 2 (Optional)"/>
City :	<input type="text"/>
State :	<input type="text" value=""/>
Country :	<input type="text" value="United States"/>
Postal Code :	<input type="text"/>

6. **Contact Information:** This information is auto populated off the user setup.

- a. **Claim Contact Name:** The person who should be contacted if there are questions regarding the claim.
- b. **Claim Contact Phone Number:** Phone number to contact in case more information is needed.
- c. **Claim E-mail Address:** Email address to contact in case more information is needed.
  - i. **Note:** This email address will receive the return/credit and claim confirmation.
- d. **Submit to this Warehouse:** The store you would like the claim and order/credit to be processed through.

#### Contact Information

Claim Contact Name: *	<input type="text" value="Courtney Davis"/>
Claim Contact Phone Number:	<input type="text" value="618-615-5485"/>
Claim E-Mail Address:	<input type="text" value="courtney.davis@trane.com"/> <small>*Please ensure this is the correct E-mail.</small>
Submit to this Warehouse: *	<input type="text" value="EARTH CITY PARTS SUPPLY"/>

7. **Distributor Information:** The store the claim is being processed through.

- a. **Note:** This will pre-populate based off the "Submit to this Warehouse". Please verify the store matches the store you wish to process the claim.

#### Distributor Information

Name:	EARTH CITY PARTS SUPPLY
Address:	3663 CORPORATE TRAIL DR
City:	Earth City

## 9. Shipping Information:

### a. Shipping Method:

#### i. Delivery: Shipping to shop or jobsite.

1. **Note:** Please verify the shipping address below is correct before moving to the next section. Address will default to the shipping address on the account.

2. **Note:** A P.O. Address cannot be used within these fields.

#### ii. Store Pickup: Picking up at the location selected above.

### b. Requested Delivery Date: Date you would like to pick up the part or have it delivered.

i. **Note:** We cannot complete same day shipments. If an item is needed for next day delivery, please also put notes in the Special Notes section expressing need for ERO Next Day Air delivery. (Freight will be added to the order for all Next Day Air deliveries.)

#### Shipping Information

Shipping Method: *	<input type="text" value="Delivery"/>
Requested Delivery Date: *	<input type="text" value="MM/DD/YYYY"/>
Order Contact Name: *	<input type="text" value="Courtney Davis"/>
Delivery Contact Name: *	<input type="text" value="Courtney Davis"/>
Phone Number: *	<input type="text" value="618-615-5485"/>
Shipping Address 1: *	<input type="text" value="Does this work?"/>
Shipping Address 2:	<input type="text"/>
Shipping Address 3:	<input type="text"/>
City: *	<input type="text" value="Chester"/>
State:	<input type="text" value="IL"/>
Postal Code:	<input type="text" value="62233"/>
Country:	<input type="text" value="UNITED STATES"/>

Delivery  
Store Pickup

October 2020

#	Sun	Mon	Tue	Wed	Thu	Fri	Sat
39	27	28	29	30	01	02	03
40	04	05	06	07	08	09	10
41	11	12	13	14	15	16	17
42	18	19	20	21	22	23	24
43	25	26	27	28	29	30	31

Today
Weeks
Clear
Done

## 8. Removed Parts: Parts removed from the unit on a part replacement or credit claim.

a. **Note:** If the part is a serialized item like a compressor, coil, thermostat, ect..., please enter in the removed serial number with the item.

i. This step only needs to be completed for serialized items and is needed to complete the Warranty claim.

b. **Note:** You can add an extra line item by selecting "Add Row"

Removed Parts - serial numbers needed for serialized parts (i.e. compressors, motors, etc)

Serial Number	Part Item Number	Description	Quantity	Required Manufacturer Return	Add Row
<input type="text"/>	<input type="text"/>		<input type="text"/>		
<input type="text"/>	<input type="text"/>		<input type="text"/>		

13. **Installed Parts:** Part(s) installed in the unit.

- a. **For Credit Claims Only**
- b. **Note:** If the part is a serialized item like a compressor, coil, thermostat, ect..., please enter in the removed serial number with the item.
  - i. This step only needs to be completed for serialized items and is needed to complete the Warranty claim.
- c. **Note:** You can add an extra line item by selecting "Add Row"

Installed Parts

Serial Number	Part Item Number	Description	Quantity	Add Row
<input type="text"/>	<input type="text"/>		<input type="text"/>	

11. **Notes:** This can be used for any special notes about repairs, expediting needs or unit information.

- a. Reason for failure
- b. Why a substitute part was used
- c. Shipping information if not previously mentioned (i.e. expediting)

12. **Submit:** Once completed, click submit.

Notes

Special Notes (Shipping ,claim, etc.):	<input type="text"/>
<input type="submit" value="Submit"/>	

10. **WCR Confirmation:** WCR will verify all information provided. If successful, a confirmation message will appear with a Confirmation Number.

## Warranty Credit Request (WCR)

- **WCR-10020261 Submitted Successfully-Actual Claim Submission Subject to Warranty Terms and Conditions.**

### Residential Unit Warranties Only:

- All parts will be invoiced to the dealer as if they are for non-warranty use.
- Please check with your Trane/American Standard parts distributor, Trane Parts Center, or Dealer Warranty Support to see if the defective part(s) must be returned for warranty credit.
  - Exempt dealers do not need to return all parts, only ones required to be returned to manufacturer
  - **If a part is required to be returned, you have 30 days from claim entry date to return part.**
  - Credit is not guaranteed until returned parts have been checked for defects by the store or factory and approved.
- For Residential Evaporator Coils, 5 tons and less must be returned by ALL dealers
- Exceptions are limited to the following:
  - Heat exchangers are entirely exempt unless required to be returned to manufacturer.
  - For all compressor claims **not** under mandatory manufacturer return, return **ONLY** the nameplate with the claim form.
    - If nameplate is illegible or cannot be removed, whole compressor must be returned.
  - For condenser coils, only the manifold assembly (including some of the spine fin on at least one of the connecting tubes) is required.
    - "The whole condenser coil will need to be returned if it is under mandatory manufacturer return to Vidalia."

## Warranty Credit Request (WMS) Search

1. Select the Search By Criteria from the drop down menu:
  - a. **Claim Number:** Once a claim is submitted it will be assigned a claim number.  
(Example: C-1234567)
    - i. **Note:** Claim Submission is dependent on if all information has been provided (i.e.- defective and replacement serial numbers, part return, failure codes/notes of substitutes)
  - b. **Date Submitted:** Date range of when WCR was submitted. *(This search can create a broad scope search for any WCRS)*
  - c. **Model Number:** The model number of the unit on the WCR *(This search can create a broad scope search for any WCRS)*
  - d. **Order Number to Credit:** The order number that you want to receive credit on for a Credit Request WCR *(This search can create a broad scope search for any WCRS)*
  - e. **Part Number:** Part number requested on the WCR *(This search can create a broad scope search for any WCRS)*
  - f. **Sales Order Number:** The original sales order the part or commercial unit was purchased against.
  - g. **Product Serial Number:** Serial number of the unit on the WCR
  - h. **Status:** The current status of the WCR: Draft, Processor Review, Accepted and Closed, ect. *(This search can create a broad scope search for any WCRS)*
  - i. **WCR Number:** Confirmation Number given at the time of submission
  - j. **Work Order Number (PO#):** PO# on the WCR form
2. If information about the WCR is known, enter it into the text box next to the drop-down menu and select search.
  - a. If information is unknown, a Wild Card Search can be completed on any search criteria. Enter an asterisk, \*, in the field and select search.

**\*\*\*Note:** The WCR search page will allow you to adjust how many results show at a given time. It defaults to 20 results but can be changed to show more results if needed.

**Warranty Credit Request (WCR): Search**

Order Number(PO#)	Job Name	Claim Number	Status	Date Submitted
Testing Oct. 2020-Part War...	credit		draft	10/12/2020
Testing- Oct. 2020	John Doe		draft	10/12/2020

3. Search Results will populate
4. Locate the WCR needed and double click to open.

### Warranty Credit Request (WCR): Search

Search by		Date Submitted ▼				
Wild Card Search allowed.Use Wild Card *						
Select Start Date and End Date for Search						
Start Date:	07/26/2020					
End Date:	10/22/2020					
Search						
Owner Name	WCR Num...	Work Order Number(PO#)	Job Name	Claim Number	Status	Date Sub...
CHAMPAIGN PARTS SUPPLY(...	WCR-10173...	Regression Testing Oct. 2020...	credit		draft	10/12/2020
EARTH CITY PARTS SUPPLY(...	WCR-10173...	Regression Testing- Oct. 2020	John Doe		draft	10/12/2020
Total Items: 2		Page Size:	20 ▼			
				1		

5. The WCR will open with claim details.

### WCR Claim Details

#### Servicer Information

Name:	ABC DEALER
EC Customer ID:	1234567
Address:	1180 Seven Seas Drive
City, State, Postal Code:	Lake Buena Vista, FL 32836
Email:	test@tavant.com
Fax:	

Work Order Number(PO#): *	Regression Testing Oct. 2020-Part Warranty
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LCU Extended Warranty Program:	false
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#### Claim Information

Claim Type:	Machine Invoice Credit
Order No. to Credit: *	11346303
WCR Number:	WCR-10173812
Claim Status:	draft

## Contact Us for Assistance with the WCR form

1. Select the **"Contact Us"** if you have any questions regarding:
  - a. Information is incorrect at top of WCR
  - b. Claim is showing in Draft Deleted
  - c. Cannot access new WMS WCR Form
  - d. Cannot submit WCR form-Receiving error
  - e. Cannot find credit on account
  - f. Cannot find what I am looking for

### Warranty Credit Request (WCR)

[Contact Us](#) [WCR Search](#)

#### Service Information

Name:	ABC DEALER
EC Customer ID:	1234567
Address:	1180 Seven Seas Drive
City, State, Postal Code:	Lake Buena Vista, FL 32836

Work Order Number(PO#): \*

#### Claim Information

Claim Type:	<input type="radio"/> Machine
	<input checked="" type="radio"/> Part Replacement
	<input type="radio"/> Invoice Credit

2. Select Submit a Request



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### 3. Select "I need help with my WCR Form"

## Submit a request

Please choose your request type below

-

I need help with my WCR form

WCR Request

### 4. Complete the form and select what is needed from "What seems to be the issue?"

## Submit a request

Please choose your request type below

I need help with my WCR form

Your email address

Comfortsite/ASDealerNet ID

What seems to be the issue?

-

Information is wrong at the top of the WCR form

Claim is showing Draft Deleted

Cannot access new WMS WCR form

Cannot Submit WCR form-Receiving error (Please attach screenshot of error)

Cannot find credit on account

Description

T B / | | | | | | | | | |

## Frequently Asked Questions

- *What does each claim status mean?*
  - **Draft:** Claim is waiting to be processed or is needing more information. Please check your email to see if you have received a request for more information.
  - **Accepted:** Claim has been processed and is waiting to be approved for credit.
  - **Accepted and Closed:** Claim has been processed, accepted, and credited.
  - **Denied and Closed:** The claim has been denied. This can occur for various reasons. Please check your email for more information.
  - **Processor Review:** The claim is currently under processor review and may require more information. A claim filer will reach out to you if more information is needed.
  - **Draft Deleted:** The claim has been deleted. This can occur for various reasons. Please check your email to see if more information is needed to process the claim.
- *How can I expedite an order for next day shipment?*
  - *If expedited shipment is needed, please add in the notes if you would like Next Day Air, 2<sup>nd</sup> Day Air or a quote for either of those.*