Trane MAP[™] User Guide





Learning Resources

Trane MAP[™] User Guide

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Getting Started

We are excited to bring you the Trane MAP[™] iPad application

exclusively for Trane Comfort Specialist Dealers.

This User Guide is designed to help you set your personal preferences in the application and provide general instructions on the various sections that you will work with. Although we think most of them are pretty intuitive, if you have any trouble you can refer to this User Guide.

First things first, you will need to download the app from ComfortSiteTM at:

https://msit.comfortsite. com/maps





If you have already downloaded the application prior to the February 3, 2012 release *do not delete the current application*. All you will need to do is update your current application. Once you have downloaded Trane MAP[™] you will need to log in to the application using your ComfortSite[™] ID and password.

The application will open on the Trane MAP[™] landing page.





The Trane MAP[™] screens are designed to work in portrait view for Dealer entry pages and landscape view for Presentation pages.

Setting Your Preferences

Dealer Portal

To streamline management of your dealership's Trane MAP[™] settings and presentations, we have created a Dealer Portal for your use.

The Dealer Configuration Portal will help you:

- Manage your dealership's Trane MAP[™] application settings
- Design your dealership's presentation
- Monitor the usage of Trane MAP[™] within your business

Home iPad Configuration *			
			[Log Out]
COMFORT SPECIALIST	TraneMap Dealer Portal		
Recent Engagem	ents <u>+more</u>	Recent Notifications	+more
John Smith	OPEN	List of Notification	
123-456-7890	John Doe 🖉		
Susan Janas	OPEN		
Jusan Jones			

Dealer Portal Home Screen

The best way to access the Dealer Portal is from your personal computer at the link below:

https://msit.comfortsite.com/mapsportal

You will be asked to enter your ComfortSite ID and password on the first screen.



The Home screen of the Dealer portal displays the menu of pages that can be accessed at the top:

- Home
- iPad Configuration

In the middle of the page are the reports that are available:

- Recent Engagements
- Recent Notifications



The three most recent engagements modified by anyone in the dealership on their iPads will display.

Clicking on the '**+more**' button provides greater detail on the engagement including contact information, status and lead source.

	TRANE					
Home	iPad Configuration 👻					[Log Out]
4	COMFORT SPECIALIST	TraneMap Dealer Portal				
	Recent Engag	ements <u>+mare</u>	Ð	Recent Notificat	ions +more	
	John Smith 123-456-7890	OPEN John Doe		List of Notificat	ion	
	Susan Jones 234-567-8901	OPEN Clark Kent				

iome iPad Configuration 👻							[<u>Log Out</u>]
							\
Full Name	Status	Add	ress	Phone/Email	RSP/Last A	ctivity	Lead Source
John Doe Smith	OPEN	111 1 st St		123-456	-7890	John	2
Siniur		City, ST 111	11	jdoe@emailcom			
Clark Kent	OPEN	222 2nd ST		234-567	-8901	DSO	
Associate		City, ST 111	111	ckent@email.com			
Jane Doe	OPEN	333 3rd ST		345-	678-9012		
Stanley Sales		City, ST 111	111	janedoe@e-mail.com			
Harry Homeowner	OPEN	444 4 th ST		456-78	9-0123	John	
Smith		City, ST 111	111	hhomeowner@email.	com		
Oarlageonsumer		OPEN	555 5 th ST		567-	890-1234	
e Stanley Sa	ales	City, ST 11	111	cconsumer@email.co	ternet Protected Mo OM	de: On	🖓 🕶 🔍 110%

Manage Dealer Information

On the '**iPad Configuation**' drop down list, click '**Manage Dealer Information**'.



Enter your dealership information in the boxes provided.

The Black TEST button can be used to verify that your web address will work on the iPad.





Your logo should be 144 x 100 pixels (width x height) and no more than 1MB file size.

If your logo is a different size it may show up blurry on your proposal or iPad screens. Click 'Save' when you have completed this screen.

- If you are not updating any other screens, navigate to the 'Home' page and click 'Publish Now'
- If you are going to update your custom pages or other dealer data, make those updates before publishing so they may be batched together



Why Choose Us

TRANE		
Home iPad Conf	liguration 👻	
Why Choo	ise Us 🔸	Custom Section
Mana Custom Pr	oposal	Landing Page
Manage De	aler	Testimonies
Dealers Informatio	n	AC and Plumbing
Address1 *	14325 Win	nie Way
City *	Carmel	
tate *	IN	
ip *	45653	
License Number	1234567	
Web Address	http://www	trane.com
Dealer Logo		

New Features:

- Change your iPad settings in one place and push the information out to ALL of your RSPs
- Create unlimited Custom sections

Landing Page



Select the image and/or video that you want on your iPads.



You can have both an image and a video on your landing page.

When uploading videos the screen may take a few minutes to refresh. Allow the upload to complete before leaving the page.



Ideal image pixel size is $1014 \ge 520$

Maximum file size of the animation is 10 MB

To load the image or
animation click
browse.



Find the corresponding animation and or image.



 Click 'Save' when you have completed this screen.

The **video** needs to be in .m4v, .mp4 or .mov formats.



The **image** needs to be .jpg, .png or .gif formats.

Testimonies

Add customer testimonials by selecting **'Testimonies**' from the Why Choose Us menu.





This text will display as the 2^{nd} item in the drop down list of custom pages.

The Manage Testimonies page lists customer quotes that you have entered.

Iome iPad Configuration 👻						[Log Ou
lanage Testimonies		Show Satisfact	on Score			Add
Consumer Name	Testimony Text	Display Sequence	Version	Active	Ad	tion
Susan Jones	I'm really impressed with your process. We are very happy wi	1	12	Y	Edit	Delete
lohn Smith	Great job! Your employees were very professional.	1	13	Y	Edit	Delete
Strong Man	Great job! Your employees were very professional.	1	13	Y	Edit	Delet
Harry Homeowner	Great job! Your employees were very professional.	1	12	Y	Edit	Delete
Carla Consumer	You really hit the ball out of the park on this one.	4	12	Y	Edit	Delete
ary Cooperative	Great job! Your employees were very professional.	4	12	Y	Edit	Delete

If you want the customer satisfaction score to display you can select that option on this screen.

					[Log Out
	Show Satisf	action Scor	e	(L	Add
Testimony Text	Displ: Sequer	iy Ice Versio	n Active	4	ction
I'm really impressed with your process. We are very happy wi	1	12	Y	Edit	Delete
Great job! Your employees were very professional.	1	13	Y	Edit	Delete
Great job! Your employees were very professional.	1	13	Y	Edit	Delete
Great job! Your employees were very professional.	1	12	Y	Edit	Delete
You really hit the ball out of the park on this one.	4	12	Y	Edit	Delete
Great job! Your employees were very professional.	4	12	Y	Edit	Delete
	Testimony Text Im really impressed with your process. We are very happy wi Great job! Your employees were very professional. Great job! Your employees were very professional.	Testimony Text Displic Immediate in the second secon	Show Satisfaction Score Testimony Text Display Bisplay (Free really impressed with your process. We are very happy with the satisfaction of the second (Free real job ! Your employees were very professional. 1 12 Great job ! Your employees were very professional. 1 13 13 Great job ! Your employees were very professional. 1 12 12 You really hit the ball out of the park on this one. 4 12 Great job ! Your employees were very professional. 4 12	Show Satisfaction Score Testimony Text Olisplay Source Version Active Im really impressed with your process. We are very happy wi 1 12 Y Great job! Your employees were very professional. 1 13 Y Great job! Your employees were very professional. 1 13 Y Great job! Your employees were very professional. 1 12 Y You really hit the ball out of the park on this one. 4 12 Y Great job! Your employees were very professional. 4 12 Y	Show Satisfaction Score Field Testimony Text Display Sequence Version Active Active Im really impressed with your process. We are very happy wi 1 12 Y Edit Great job! Your employees were very professional. 1 13 Y Edit Great job! Your employees were very professional. 1 13 Y Edit Great job! Your employees were very professional. 1 12 Y Edit You really hit the ball out of the park on this one. 4 12 Y Edit Great job! Your employees were very professional. 4 12 Y Edit

Click '**Add**' to enter new testimonies.

To add new testimony, complete the following:

- Customer's Name
- Display Sequence:

me iPad Configu	ation 🔻			[Log Out
dit Testimony				
onsumer Name *	Susan Jones			
splay Sequence *	1			
escription *	I'm really impressed with your process. We are very happy with the new Trane Air Conditioner.			

(Determines order testimony will display on screen.)

- Description: Add the quote
 - The iPad will automatically format it with quotes around the statement
- You will need your customer's written permission to use their quote

Click 'Save' when you have completed this screen.

Custom Section

The Custom Section allows you to add information about your business and what makes it the one they



want to do business with.

To edit the 'Custom Section' select it from the menu by 'Why Choose Us'.



The Manage Custom Sections screen displays a list of the buttons that will show below the Home and Testimonies.

Home iPad Configuration	•							[Log Out]
Manage Custom Sec	tions							Add
Button Label		Custom Header		Display Sequence	Version	Active	,	Action
Team Work	Your Center of Excellence			0	29	Y	Edit	Delete
Customer Satisfaction	Highest Standards			1	29	Y	Edit	Delete
Certifications	Superior Service			2	29	Y	Edit	Delete
Community Service	Dedicated			3	29	Y	Edit	Delete
			MAIN MENU V	•	3033 644 778446			RESOURCES + Proposal
			Book -		Ho Tet Tai Tai but But but Tai Cu Cu	me stimonials e e ton ton ton e stornized 2 atomized 3		

Some ideas for sections you may want to create:

- Our Team
 - Page for each RSP
 - Picture
 - Experience
 - Certifications
 - Page(s) for service technicians
 - Picture
 - Experience
 - Certificatons
- Warranty
- Guarantee
- Awards
- Additional Services
 - Duct cleaning
 - \circ Maintenance agreements
- Community
 - Organizations your business supports
- Accredidations
 - Certifications and licenses your business holds

Click 'Save' when you have completed this screen.

Publish

Any changes you make need to be published for others to view them.

Manage Custom Sec	tions			
Button Label	Custom Header	Display Sequenc	e Version Active	e Action
Team Work	Your Center of Excellence	0	29 Y	Edit
Customer Satisfaction	Highest Standards	1	29 Y	Edit
Certifications	Superior Service	2	29 Y	Edit
Community Service	Dedicated	3	29 Y	Edit
				Pages

Go to the home page by clicking on the Trane logo at the top or clicking Home in the menu from any screen on the portal.

You will see the Publish Now button at the top.



Once you click '**Publish Now**' your iPad will receive a notification within a few moments.

On each iPad, log out of Trane MAP and log in again so that every iPad will check the servers and display the updated information.

Trane MAP Settings

There are two menus on the landing page. The MAIN MENU includes sections that guide you through the selling process. In order to customize the Trane MAPTM application for your business we will first look at the RESOURCES menu.

In the drop down menu you will see links to:

- ComfortSiteTM
- Settings
- Energy Savings Calculator
- Trane Financing
- Log Out



Tap on the '**Settings**' link in the '**RESOURCES**' menu. On the Settings page you will enter the RETAIL SALES PROFESSIONAL information.

If you have a notification and the Update Product Data button is visible, you will want to initiate this update before you get started. This will ensure that you have the latest product information loaded into the application. To do this, tap on the Update Product Data button.

	3:07 PM	1
MAIN MENU	. TRANE	RESOURCES ~
SETTINGS		
Back	Dealer & RSP Settings	Cancel
RSP Name	First	
	Last	
RSP Email	Email	
RSP Phone	Phone	
Style	Top-Down	Calendar — Default 🗐
Update Produ	ct Data	
(Downloads the	latest text, images, videos, etc. used in the app)	UPDATE PRODUCT DATA
Download All	Product Data	<u>م اس</u>
(Downloads all a	available product information)	WNLOAD ALL PRODUCT DATA
pen Engagemen	t	Notifications
	©2011 Trane, All rights reserved	▲ 0 Notifications

If you feel you are missing data after running the update, try to download all product data by tapping the red button. After the full download (approximately 30 minutes) check for the data you were previously missing. If you are still missing data, contact your DSO or IWD Point Person. One you have pressed the product update button you will get a confirmation screen. Tap the START button to continue.





We recommend that you use a WiFi connection to update the product data.

- Product updates are faster on WiFi connection
- A WiFi connection bypasses data plan usage

When the product update begins you will see the working graphic spinning. The initial update may take up to 20 minutes. Subsequent updates will only take a few minutes.

When updating, plug your iPad into the charger to ensure there is enough battery power.





When the update is complete a confirmation screen will appear. The program will automatically close. Simply reopen the application to resume. This will only need to be done when you receive a notification to update your product data. Once you have reopened the application, go back to the RESOURCES Menu. Tap on the SETTINGS tab and the screen will open back at the Dealer and Retail Sales Professional (RSP) Settings page.

Tap in the fields to bring up the keyboard and add the appropriate information.

iPad 🔶	4:20 PM		91 %
MAIN MENU		RESOURCES	~
Back	Dealer & RSP Settings	Cano	
RSP Name	First Last		
RSP Email	Email		
RSP Phone	Phone		
Style	Top-Down 📃 Calendar Calenda	r — Default 📃	
Update Produ (Downloads the Download All (Downloads all a	et Data Intest text, images, videos, etc. used in the app) Product Data wallable product Information) DOWNLOAD ALL	DDUCT DATA	
Q W	E R T Y U I C	D P	E
∲ Z	х с v в n м !	?	ŵ
.7123		.7123	



The NEXT key on the keyboard will tab you to the next field for date entry. You may however continue to touch on any field you wish to edit. There are two specific choices that need to be made on the Dealer and RSP Settings pages.

The first one is to specify a calendar. Tapping on the selection button will give you the option of choosing any calendar linked to your iPad. You may choose to use a Microsoft Exchange (Outlook) or the Gmail Exchange calendar to track your appointments.

The iPad will support multiple email clients and you might want to

RSP Name First Last Last RSP Email Email RSP Phone Phone Style Top-Down Calendar Calendar Calendar - Default Update Product Data UPDATE PRODUCT DATA	Back	Dealer & RSP Settings
Last RSP Email Email RSP Phone Phone Style Top-Down Calendar Calendar - Default Update Product Data Downloads the latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA	RSP Name	First
RSP Email Email RSP Phone Phone Style Top-Down Image: Top-Down Calendar Calendar Calendar - Default Update Product Data (Downloads the latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA		Last
RSP Phone Phone Style Top-Down Calendar Calendar Default Update Product Data (Downloads the latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA	RSP Email	Email
Style Top-Down Calendar Calendar – Default Update Product Data (Downloads the latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA	RSP Phone	Phone
Update Product Data (Downloads the latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA	Style	Top-Down Calendar – Default
(Downloads the latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA	Update Produ	ct Data
	(Downloads the	latest text, images, videos, etc. used in the app) UPDATE PRODUCT DATA
Download All Product Data	Download All	Product Data
(Downloads all available product information) DOWNLOAD ALL PRODUCT DA	(Downloads all	available product information) DOWNLOAD ALL PRODUCT DATA

create a separate email and calendar with a unique name to support your contact list

?		4:19 PM	
MAIN MENU	•	TRANE	RESOURCES .
SETTINGS			
Back		Dealer & RSP Settings	Cancel
RSP Name	First		
	Last		
RSP Email	Email	Good-Better-Best	
RSP Phone	Phone Ton Down		Colondar Dotault
Update Produc	ct Data	- Calencar	
(Downloads the	latest text, imaç	ges, videos, etc. used in the app)	UPDATE PRODUCT DATA
Download All	Product Data		
(Downloads all a	vailable produc	t information)	WNLOAD ALL PRODUCT DATA
Open Engagemen	t		Notifications

You will also want to select the selling style that you find most comfortable. You may choose Top Down or Good-Better-Best. This choice will be reflected in your presentation and proposal style.

Main Menu

Now it's time to walk through the sales modules. From the Trane MAP^{TM} Page tap on the 'MAIN MENU' tab to see the modules that are

available to guide you through the in-home selling process.

The Menu can be used as a short cut to any step but you will also be able to move to previous and subsequent steps in the process with arrows that display at the bottom of the screen for each step.





A Notification Icon will display at the bottom of the page to indicate data updates that need to be applied. *See arrow above.*

Clients

Taping the CLIENTS tab will open the Client Engagement landing page. On this page you have two options. You can tap the screen to open an existing engagement or you can add a contact.

There must be an open engagement to proceed through Trane MAP[™].

The engagement list pulls directly from the calendar contact list that was selected in the setup process.



To add a contact, tap on the 'Add Contact' Button. The Screen will open a New Contact Data Base and you will add the client information.

This will add a new contact to your contact list associated with the calendar you defined in setup.

The screen includes the usual options for adding name, number, address and photo. You can change the labels on the fields by tapping the current label. The first address added will be identified as the job site address in the proposal. A

iPad	(t •		.:37 PM 88%	1
Can	cei	New	Contact	
	add	first		
2	moto	ast		
		Company		
	mobil	Phone		
	ema	Email		
	rington	Default	>	
	text ton	Default	>	
	home pag	URL		
0	add new a	ddress		
0	add field			

second address can be added as the bill to address.

	Add Field	
	Add Field	
Prefix		
Phonetic First Name		
Phonetic Last Name		
Middle		
Suffix		
Nickname		
Job Title		
Department		
Instant Message		
Birthday		
Date		
Related People		
Notes		

You may also include additional information in the '**add field'** that includes phonetic names, job titles, instant message usernames, birthdays and notes. To View Engagements tap on the '**View Engagements**' button or tap on the screen. A drop down menu will display with the available engagements.





Engagements will only be displayed if it is not a recurring meeting and the contact has an email address defined in the contact list. To create an engagement from your contact list, tap the plus sign at the top of the View Engagement Screen.

iPad 🙃	4:13 PM	100%
	Please choose a client to visit.	
Groups	All from My PC	Cancel
Q Search		
Α		A
Sam A dam s		в
В		c
Sam Burner		D
Tom Burner		E
С		1
Carl Consumer		G
David Consumer		н
Ethan Consumer		i
Fran Consumer		ĸ
George Consumer		L
Hillary Consumer		м
Inez Consumer		N
John Consumer		0
Karl Consumer		р
Lonnie Consumer		٥
Matthew Consumer		B
Nancy Consumer		8
Orlando Consumer		U U
Paul Consumer		v
D		W
Corl Door		х
David Dava		X
David Door		z
Ethan Door		#

Your contact list will display and you can select the client by tapping on the name. The screen will automatically populate the engagement with the contact information for the client you have selected. You may edit any contact information included in the engagement, add notes to the account and track the lead source as well as the likelihood of a sale.

Defining an engagement will automatically add the appointment to your calendar.

÷			4:38	РМ			100
MAIN MENU			7	RANE		RESOUR	ces 🗸
CLIENTS							
Carl Consu	mer	Add Contact				Email Wo	rk Order
Date/Time	02/01	/2012 05:00PM [Status	(9)	Open	
Email	cd	Date 8	k Tim	e		Unspecified	
Home	8	Mon Jan 30	3	58		Unspecified	
Cell	P	Tue Jan 31	4	59	АМ		
Work		Today	5	00	PM		
Home Address	0.0	Thu Feb 2	6	01			
Bill to Address	5	Fri Feb 3	7	02			
	0				Select		
		ERANINI		-	-		
		Edit Contact					
leason for Visit	E .			Reaso	n for No Sa	ile	
						WORK WITH CL	IENT
Open Engagem	ent:					Notifications	
						A 1 Notifica	tions

(0+	1:	24 PM	100
MAIN MENU	- 0	TRANE	RESOURCES 🗸
CLIENTS			
View Engagem	Add Contact		Edit
Carl Consur	ner		Email Work Order
Date/Time	02/02/2012 02:00PM	Status	Open
Email cc	onsumer@email.com	Lead Source	Unspecified
Home	Phone	Rating	Unspecified
Cell	Phone	Notes	
Work	123-456-7890		
Home Address	Street City State ZIP Country		
Bill to Address	111 1 st Street Any City, ST United States of Amer	ica	
Reason for Visit		Reason for No S	ale
			WORK WITH CLIENT
Onen Engangeme	nt:		Notifications
open ungagerrie			

Once an engagement status has been changed to '**Sold**' a work order can be emailed. The status options are: Open, Pending, No Sale, Sold Good, Sold Better, Sold Best and Sold Top-Down.



(0-	4:	48 PM	10
MAIN MENU	-	TRANE	RESOURCES ~
CLIENTS			
View Engagem	ents Add Contact		Edit
Carl Consur	ner		Email Work Order
Date/Time	02/01/2012 05:00PM	Status	Open
Email	.cconsumer@email.com	Lead Source	Unspecified
Home	123-456-7890	Rating	Unspecified
Cell	234-567-8901	Notes	
Work	345-678-9012		
Home Address	111 1ª Street Any City, ST 11111 United States		
Bill to Address	Street City State ZIP Country		
Reason for Visit		Reason for No S	ale
1000 (100)			WORK WITH CLIENT
Open Engagemen			Notifications
			A 1 Notifications

Once you have edited your Client information, tap the '**Done'** button and then tap the '**WORK WITH CLIENT**' arrow.

Tapping the arrow leads you to the Comfort Checklist.

Comfort Checklist

On the Comfort Checklist you can rate the comfort concerns with a High, Medium or Low concern value. We have also included sample questions to use in discovery ('**Show details**'). Navigating the Comfort Checklist is a simple tap to mark values and a swipe to scroll through the checklist.

How important would you rate:	HIGH
You deserve to have a quiet operating system that doesn't interfere with your life inside or outside your	MEDIUM
home. Do you notice your current system when it is operating? Would you like to not be aware when your system is running?	LOW
Hide details	
How important would you rate:	
Energy Savings	HIGH
	MEDIUM
✓ Show details	LOW
How important would you rate:	



The selections made in the Comfort Checklist will carry over to the presentation so that you can remind the homeowner of the concerns they mentioned and why the equipment you recommend for their home will address those concerns.



As you rate each Comfort Concern, the text will change color from black to green.

Home Survey

Once you have completed the Comfort Checklist, select the '**Next Section**' Arrow to move to the Home Survey.

The Home Survey allows you to gather information on the existing system and well as document what is required for the new system. Each component has a selection of items to complete to create a detailed survey for each client.

Pad 🙃	8:56 AM	73 % 😥
MAIN MENU 🗸	TRAME	RESOURCES 🗸
	Existing System New System	
AC/HP		0 / 30 completed >
Furnace		0 / 56 completed >
Electrical		0 / 7 completed >
Air Handler		0 / 48 completed >
Package Units		view all >
Thermostat		0 / 9 completed >
Home & Size Restrictions		0 / 23 completed >
Ductwork		0 / 6 completed >
COMFORT CHECKLIST		LOAD CALCULATOR
Open Engagement:		
Carl Consumer		A 1 Notifications



Information that is entered into the 'Existing System' tab can be transferred to the 'New System' tab. There is no need to re-enter data. AC/HP Tab of the Home Survey

Notice that there are multiple sections to fill out in the Existing AC/HP tab. You can tap on the selection boxes for the most common choices. You may also select the OTHER field and enter specific values.

Pad 🙃		9:02	AM	74% 82
MAIN MENU 🗸		07	Amana American Standar	RESOURCES V
A HOME SURVE	Y		Armstrong	
			Bryant	
(0)	Existin	ng System	Carrier	
Back		Existing	Comfortmaker	Cancel
Details			Goodman	
Unit Type:	unspecified		Heil	s: amps
Brand:	unspecified		Honeywell	inspecified
Model Number:			Lennox	inspecified
Serial Number:		- 1	Maytag	uration:
Nominal Cap:	unspecified		Payne	unspecified
SEEB.		_	Rheem	inspecified
Outdoor Unit Loss	ation:	- 1	Ruud	inspecified
Outdoor Onit Loca	unspecified		Tempstar	
Unit Dimensions (Inches):		зм	imspecielo 🖻
[height] x [width x d	epth	Trane	unspecified
			White Rodgers	es: unspecified
Other Details			York	Box
Pad Size (Inches	ð:		Other	
COMFORT CHEC	KLIST			LOAD CALCULATOR
Open Engagement:			N	otifications
Carl Consumer				▲ 1 Notifications



Images can be added to the Home Survey. Simply go to the 'Existing System' or 'New System' pages and scroll to the bottom. You can add photos by taking them directly from an iPad2, or you can import them from pictures you have stored on your iPad.



If you take photos from an android smart phone you can share them to your iPad by using a 3rd party tool like Dropbox to push the picture to your iPad. If you have an iPhone the Apple iCloud will sync any photos from your iPhone to your iPad automatically.

Once you have completed the survey for the AC/HP, select the BACK button to move to the next piece of equipment.



You will continue through the home survey filling out the appropriate information for each product or component selection.

Once you have completed the Home Survey tap the 'Load Calculator' arrow to move to the next section.

HOME SURVEY					
* (0)	Existing S	System	New System		
sck	E	xisting	Furnace	_	Can
Init Details			Electrical Details		
Brand:	specified		Equipment Rated Amp	os:	amp
Model Number:			Disconnect Type:	unspecified	
Serial Number:			Fuse Type:	unspecified	F
Blower Capacity:	unspecified		Electrical Circuit Confi	guration:	
BTU Input:				unspecified	
BTU Output:			Breaker/Fuse 1 Size:	unspecified	F
Unit Dimensions (Inch	ies)		Breaker/Fuse 2 Size:	unspecified	E
height x width	x depth		Wire Size (Guage):	unspecified	
Combustion Air:	unspecified		Wire Material:	unspecified	
Unit Orientation:	unspecified		Distance to Electrical	Box:	ft.
Indoor Unit Location:	unspecified		Number of Control Wi	res:	
			1.04	D CALCULATO	B

Completing the Home Survey section is not required in order to complete the sales process and proposal. The only required sections are CLIENTS and EQUIPMENT SELECTION.



All information you collect in the home survey will be reported on the client proposal and can be printed for your installers.

Load Calculator

CarmelSoft Load Calc has been added to the Trane MAP system. Very little has changed from the separate CarmelSoft application. Training materials from CarmelSoft can be found on ComfortSite™ or on CarmelSoft's web page at:

	Block	Load	Room-by	Room		
Vindow/Door List	Project	Envelope	Window/Door	Skylight	To G	0
Window/Glass Doo	r Inputs					
Window/Glass doo	rid:		A			
Description:			Window			
Construction #:			None		0	
Window/Glass doo	r type:		French Doo	•	0	
Frame type:			MB - Metal	w/Break	٥	
Orientation:			East		٥	
Area of one window	v/door (SqFt):				50.0	
0.0	i i	1 20	00.0	1	400.0	
Quantity:					2	
Block Load Breakd	own					
	Cooling		1	Heating		
6.0 Quantity: Block Load Breakd	own Cooling	2	20.0	Heating	400	2

http://www.carmelsoft.com/Software/Software_Mobile_iPad_HVACResL oadCalcsHD_Help.aspx.

Co/B	cc. From: kirk.spencer@irco.com						
Subj	ect: Heating and Cooling Loads for Pro	ject: Ryz	en Hilliard				
HVA	C COOLING AND HEATING LOA	D BRE	AKDOW	NS		-	1) Room Na
Proj	ect: Ryan Hilliard	1	Location	: (null), (ni	all)		L, H & W in o and gross So
	Indoor db Heating 64	.0	Latitude	33.0N	DR	Low	2) Exposed
	Indoor db Cooling 80.	0	99% db	41.0	HTD	23.0	3) Partition
	Indoor RH Cooling 67.	0%	1% db	83.0	CTD	3.0	4) Floor
_	Elevation 97	.1	Grains	78.8	ACF	1.0	5) Ceiling
				Constru Direction	ction Numb n & Details	per	
6A	Window & Glass Doors		A	1A-c (Window)			
6B	Skylights		A	Skylight (North)			
7	Wood & Metal Doors		A			_	
8	Above Grade Walls	ve Grade Walls					1
8	Partition Walls		A				
9	Below Grade Walls		A				
10	Ceilings		A	16B-13 (Ceiling)		0
10	Partition Ceilings		A				1
11A	Floors		A			i	
12	Infiltration		A	Envelope	e Leakage	Tight	Infil Airflow fe
_	Gross exposed wall area for WAR	: 100.0	B	No of Fir	eplaces	1	Infil Airflow fe
13	Internal Gains		A	Number	of bedroom	s 3	# Occupants
-	One occupant = 100.0 sensible lo	ad	В	Applianc	e Gains		
14	Sub Totals		2011 - 1				Concession in the second second
15	Duct Loss / Gain						Factors >
16	Ventilation						Airflow for th
19	Blower Heat Gain Ma	Inufactu	rer's perf	ormance o	lata has blo	wer he	at
20	Total Sensible Loss or Gain (su	m lines	14 throu	igh 20)		-	
					21	A) La	tent Infiltration
Bru	ce's HVAC, Plumbing and Confe	cionary	£			B) La	tent for Occu
143	25 Doggie Treat Way					C) La	tent Ventilati

From the CarmelSoft Load Calc Module you can email a report by clicking on the grey pie chart in the upper right corner.

Once you have entered the data into the Load Calc the tonnage will automatically be entered into the equipment selection module.

Equipment Selection

In the Equipment Selection screen, you will start with Setup where you choose tonnage, maximum indoor space (if it is a concern) and any comfort enhancements for the system.

The equipment selector will auto import the tonnage from the load calculator, but you can manually override this feature by typing in the tonnage field.

The BTU range field has been added to allow for furnaces that are not "Exact" matches to the tonnage.

 Entering in a 3 Ton unit and setting the BTU range to 10% allows furnaces with BTUs from 32,400 to ~39,600 instead of locking in to 36,000 BTUs

ATAT 🜩	4:48 PM	🕴 Not Chargin
MAIN MENU 🗸	TRANE	RESOURCES +
EQUIPMENT SELECT	ION	
	Setup Custom System)
Setup - Intel Adverser	t settings before defining a solution	
Tonnage	3 🗊 BTU Range	• 10 % 🔟
Indoor Dimensions		
Height Height in	Width Width in.	Depth Depth In.
Height Height in	Width Width in	Depth Depth in
LOAD CALCULATOR		Contraction of the local division of the loc
		PRESENTATION
Open Engagement:		PRESENTATION

Indoor dimensions restrict the list of indoor units.

- Size pertains to the size of the indoor space (i.e. closet size, basement size, or crawlspace size), *not* the system itself
- If you go to your custom section and find there are no matched systems, try to remove the values in the dimensions and then go back to select your equipment



Next you will select the Custom System tab.

	Setup	Custom Syst	m		
Custo	m System				Tonnage
Type of s	System AC / Furnace	Indoor Ori	entation	Choose	
Minimur	n Efficiency				
SEER	14.25 EER 12			Heat Cap 3	6000
Outdoo		Indoor			
Family	4TTA3 - 4TTA3	Family	901H - >	(T90 Direct/	۲
Model	4TTA3036A4	Model	TUX1C1	00A9H4	
		Coil	4TXCB0	36BC3	
	Approved Equipment: 5	Coil	Cased		
Comfort	Enhancements				0

From this screen you can enter the type of system and SEER or EER. These selections will narrow the search parameters and Trane MAPTM will only pull approved AHRI combinations that match that criteria.

On the Custom System and Good/Better/Best screens if entering in a furnace you may limit the approved equipment by entering in a Heating Capacity.

e,	4:42 PM		Not Charging
	TRANE	RE	SOURCES 🗸
EQUIPMENT SELECT	ION		
	Setup Custom Sys	stem	
ustom Syst	em		Tonnage: 0
Type of System AC / Furn		tation Choose	
Efficiency	4TTA3		
SEER	EER 4TTB3		
	4TTB4e		
idoor	4TTR3		
nily Choose	ATTR4	se	
el	4TTR5e		
	4TTX5	-	
Approved Equips	nent: 21,339 4TTX6	selli	
	4TTZ0		
HOME SURVEY		PRES	
Engagement:		Notificatio	ns

There are two ways to choose a custom system. You can chose equipment based on family by tapping on the selection boxes.

You can also make the equipment selection by tapping on the 'Approved Equipment' button at the bottom of the page. All combinations are based on AHRI approved system combinations. A list of approved combinations will display on the screen based on the criteria that you have already added (tonnage, indoor dimensions, family, SEER, and Type of System.) Once you have made the equipment selection, the model numbers will be displayed on the Custom System page.

3852034 3852035 3852047	411X6024E1	41EE3E39A1				
3852035 3852047	" I have seen at a start that the basis is been be-		25600	18.5	16.85	13.5
3852047	4TTX6036E1	4TEE3F40B1	36600	26.8	17.45	13
	4TTX6024E1	4TEE3C01A1	24000	16.4	17.5	13
3852048	4TTX6024E1	4TEE3C01A1	24400	17	16.5	13
3852049	4TTX6024E1	4TEE3C02A1	25400	17.7	17.25	13
3852050	4TTX6024E1	4TEE3C02A1	25400	17.6	17.25	13
3852051	4TTX6024E1	4TEE3C03A1	25800	18	18	13.5
3852052	4TTX6024E1	4TEE3C03A1	25600	17.8	17.25	13.5
3852053	4TTX6024E1	4TEE3C04A1	26000	18.2	18	13.5
3852054	4TTX6024E1	4TEE3C04A1	25600	18.1	17.75	13.5
3852055	4TTX6024E1	4TEE3C05A1	26800	19	18	14
	Approved E	quipment: 37				

	Se	tup	Custom 5	System	
Cust	om System				Tonnage: 3
Type of	System AC / Air Handler				
Efficier	су				
SEER	E	ER			
Outdoo	r		Indoor		
Family	4TTX6		Family	Choose	
Model	4TTX6036E1		Model	4TEE3C02A1	
_					
	Approved Equipment: 3	17			

Your selections will also be influenced by your initial setup choice for either Good, Better, Best or Top Down Selling.

You can select multiple
comfort enhancements. Once
you select the comfort
enhancement, you can choose
model number from the
product list.

Comfort enhancements will apply to all systems you select if you have chosen the good, better, best selling method.



Presentation



Now that you have the survey information you need and have selected equipment, it is time to sit down with the client for the presentation.

At this point, how you proceed is entirely up to you. We will show you the presentation section from left to right for this Users Guide.



Remember: Presentations are always in LANDSCAPE view.

ad 🙃	4:04 PM	∦ 92% 🔳
	TRANE	RESOURCES 🗸
Back		Proposal
Why Choose TRANE		
Trane believes everyone deserves the most reliable, energy efficient system.		
That's why we imagine a Trane for every home. At Trane we believe everyone deserves to be as comfortable in their home as possible.		
That's why we insist on only premium materials, from our all-aluminum coils, to the legendary Climatuff® Compressor, all the way down to the corrosion-resistant coating we put on our tiniest fasteners.		
That's why we use designs perfected over years of careful research using some of the most brutal testing imaginable in the		
Why Choose Trane		Your Custom System

For the Why Choose Trane Section we have included a brief overview of our core values and a short video called "Why Choose Trane".



At any time during the presentation you can tap on the Check Mark at the top of the screen to review the Comfort Checklist with the client.

We have changed the presentation of these screens to put in order of what the customer said was most important to least important (or not rated = N/A).

- Full Grey Pill = High Importance
- 2/3 Grey Pill = Medium Importance
- 1/3 Grey Pill = Low Importance



The next section of the presentation- Why Choose Dealer- tells the client about your individual company and incorporates the information you created on the Dealer Portal.

https://msit.comfortsite.com/mapsportal

Using the Dealer Portal provides these advantages:

- You can centrally manage the information from the comfort of your home or office connected to the internet through your PC
- All of your iPads will be synced with the same data
- You can insert images and videos (videos are limited to 10MB each) to all of your custom pages, including the Landing Page seen above

ATBT 😌	4:49 PM	Not Chargin
MAIN MENU ~	TRAME	RESOURCES 🗸
Back	Testimonials	Proposal
TRANE Customer Satisfaction Results	Customer Testimonials	
Customer Satisfaction Score 75%	"I'm really impressed with your p with the new Trane Air Condition	process. We are very happy ner."
Ratings are based on service, installation and sustamer satisfaction conducted by an independent shird-party service and updated weekly.	Carla Consumer "Elementum ac massa amet, lor honcus eros vel tortor, in uttrici sed lectus augue tempor phasei nicicular Magna uma, tempor ti est montes purus, nunc elementi massa mid2 ha marti in vol. Plat rhoncus tortor montes augue ha magnis! Magna socia massa! S el integer pid nisi ut incidunt al lacus socieridique hai a noc? Tu timodicum mattis velt? Uma nato temporte a socieridique para	em? Pulvinar ac, auctor es? Placerat nunc phasellus llus lorem et. Portitor sit et arysis mid dis guis, a aliquet tum odio risus dolor turpis a enim. Turpis egestas, vut e, parturient. Duis parturient agtitis nisi cursus penalibus Placerat adipsicing sit magna cidunt in natoque cursus que augus qué sit non cambusi Obio uma cum
View Brochure	MB-6	
Why Choose Trane		Your Custom System

When you set up your Why Choose Dealer section on the Dealer Portal you can opt to display your Customer Satisfaction Score as part of your presentation.



The client's Custom System that was selected by you and the client through results from the Comfort Checklist, Home Survey and Equipment Selection is highlighted in the Custom System section of the Presentation home page. You can tap on the radial buttons* for detailed information about each piece of equipment that you selected for the client.

*You will notice that this page includes radial buttons on every piece of equipment. For your presentation, only the equipment that you selected for the client will have radial buttons displayed.



Each Radial Button will take you to a product picture. There is a link to the product brochure at the bottom of each piece of equipment.

iPad	4:12 PM	Not Charging 📟
MAIN MENU V	TRANE	RESOURCES 🗸
Back		Proposal
	Simplified 2-Wire Connection	Image: A state of the state
4TTZ0036A1		
Features	Allows for easier installation while reducing for structural modification.	the need
ComfortLink II Control Board		
Charge Assist Charging		
Simplified 2-Wire Coni		
DuraTuff Rustproof Basepan		
Louvered Panels		
WoothorCuord Featoners		
View Brochure		
		©2011 Trane. All rights reserved
Why Choose Trane	Your C	ustom System

Tap on the product picture to reveal a list of key features. Tap on each of the features to provide a description of the function.

Notice the three buttons in the upper right. The talk bubbles are for talking points, the camera will display an image of the feature and the movie studio clapper will show videos. If there are no videos or images those buttons will be grayed out.

As a Retail Sales Professional your job is to build the benefit for each customer.

Proposal

The final step is to complete the proposal and present it to the client. The equipment will be detailed on the front of the proposal.

Proposals will be effected by your system selling choice whether that is Good, Better, Best or Top-Down.

Pad 🗢	5:48 PM	∦ 100%≣
	TRANE	RESOURCES 🗸
		Propose
ANGEL H	ERNANDEZ'S TOTAL COMFORT SYSTEM PROPOSAL	& AGREEMENT
Trane Equipment	Efficiency Ratings	Total Investment
AC / Air Handler 4TEE3C02A1	•	
AC / Air Handler 4TTX6036E1	SEER: 16.5 EER: 12	d 😒
Monthly Payment Special Instructions		Paste From Clipboard
1 2 3	4 5 6 7	8 9 0 🛛
- / :	; () \$	& @ Next
#+= undo	. , ? ! ,	" #+=

You will need to enter the total price of the system or equipment you are proposing to the client in the '**Total Investment**' box.

If you want to offer financing to the client, select '**Trane Financing**' from the '**RESOURCES**' drop-down menu, calculate the monthly payment in the financing calculator and hit '**SAVE**'. Go back into the proposal screen and tap "Paste from Clipboard" and the monthly payment information from the financing calculator will automatically populate into the Monthly Payment field.

Pad ᅙ	5:49 PM	* 100% 📟
MAIN MENU 🗸		RESOURCES ~
PROPOSAL		
		Propose
ANGEL HE	RNANDEZ'S TOTAL COMFORT SYSTEM PROPOSA	L & AGREEMENT
Trane Equipment AC / Air Handler 4TEE3C02A1	Efficiency Ratings	Total Investment
AC / Air Handler 4TTX6036E1	SEER: 16.5 EER: 12	\$7,557.98
Monthly Payment		Paste From Clipboard
Special Instruction		
Extended Warranty		
PRESENTATION	1	
Open Engagement:		Notifications
ANGEL HERNANDEZ	©2011 Trane. All rights reserved	▲ 0 Notifications

Add any additional notes or special instructions you want to include and touch the Propose button at the top of the page. The last page of the proposal has a place for both the client and the sales person to sign.

Once the signatures are in place the proposal can be e-mailed to the appropriate parties.

Pad S 6:01 PM Not Charging
Cancel proposal for Ridge Run Kenes Send
To: angel-hernndez
Cc: curducus Transformation and
Bcc:
Subject: proposal for MI Shaw Ridge Run Kenesaw, GA 30152
is pleased to provide the attached proposal for work to be performed at Ridge Run Kenesaw, GA 30152
Pur Hernandez'sroposal.pdf
Sent from my iPad



Extras

Also included in the Trane MAP[™] application are links to ComfortSite[™], Trane Financing and the Energy Savings Calculator.







NOTE: This publication is general in nature and is intended for INSTRUCTIONAL PURPOSES ONLY. It is not intended for equipment selection, application, installation, or specific service procedures. Pub. No. 022-8381-02 ©2012 Trane. All rights reserved.