



Spring 2022

National Consumer Promotion

SALES PLAN #:

RS-SP209D

PROGRAM NAME:

Spring 2022
National Consumer Promotion
for TCS Dealers

CHANNEL:

DSO

REBATE:

April 1, 2022-May 31, 2022

PUBLICATION:

Version 1 - March 1, 2022

OWNER:

Mary Wilson

PURPOSE

As a Trane Comfort Specialist (TCS) Dealer, we value your commitment to the brand and products. We are proud to announce the Spring 2022 National Consumer Promotion for TCS Dealers to provide you with a competitive tool for promoting sales of higher-efficiency *and* connected systems in the residential replacement market during the spring shoulder season.

PROMOTIONAL OFFER

TCS Dealers receive up to \$600 in instant rebates on homeowner purchases of Qualifying Equipment.

See Exhibit A of this document for models and combinations approved for use in this offer. Dealers may receive multiple instant rebates for multiple eligible consumer purchases per Qualifying Equipment in Exhibit A.

These offers cannot be combined with RNC/NOO quoted pricing or any other national Trane consumer offer.

EFFECTIVE PERIOD

- Consumer Purchase Period: **April 1, 2022 – May 31, 2022**
- Consumer Installation Period: **April 1, 2022 – July 31, 2022**
- Claim Submission Period: **On or after May 5, 2022 - July 31, 2022**



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ELIGIBLE PARTICIPANTS

Participating independent Trane Comfort Specialist (“TCS”) Select, Prime, or Premier Dealers are eligible to participate in this Plan provided:

- Participating independent TCS Dealers (hereinafter “Dealer”) must have a signed 2022 Dealer Sales Agreement or other signed, current, and active Dealer Sales Agreement with Trane and must be in good standing with Trane; and
- Participating Dealers must purchase Qualifying Equipment from Trane/Trane Supply from assigned Pricing Tier; and
- Rebates in this offer are NOT available if RNC/NOO quoted pricing is utilized when purchased from Trane; and
- Qualifying Equipment returned may cause a reverse Debit Memo to the TCS Dealer; and
- All installations must be located in the United States.

QUALIFYING EQUIPMENT

Only Qualifying Equipment as defined in this Sales Plan is eligible for the above-stated rebate. All offers are based on product availability. No substitutions or exceptions will be granted.

Qualifying Equipment for rebates under this Plan:

- Systems with Trane Smart Home Thermostats, as listed in Exhibit A; and/or
- Components as listed in Exhibit A.

Please refer to Exhibit A in this plan for specific Qualifying Equipment by model family.

Trane Smart Home Thermostats under this Plan for TCS Dealers are:

- TCONT724
- TCONT824
- TCONT850
- TZON1050
- THUI2360 (the Trane UX 360 Smart Home Thermostat is compatible with Trane Link and available in select markets only)



PLEASE NOTE:

- Dealer sales to a builder without a direct homeowner purchase at the time of sale do NOT qualify under this plan.
- This offer is NOT valid on installations for commercial purposes. Qualifying Equipment must be installed at a residence.
- Homebuilder or contractor-quoted purchases for new construction, multi-family, non-owner occupied, or any other special instant rebate program are NOT eligible and will be declined.
- Must be residential equipment. Commercial equipment does NOT qualify.
- Substitutions using American Standard components are NOT allowed and will not be reimbursed.
- This specific sales plan excludes Lowe's, The Home Depot, Sam's Club and/or BJ's sales.

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ADVERTISING SUPPORT

To support this offer, Kitchen Table Sell Sheets are posted on MAX. To download, visit:

ComfortSite > Marketing Center > MAX > Info Center > Promotions

To download Radio and TV Tags, and TV Art Cards the Facebook graphic, Dealer Guide and Kitchen Table sheets:

- **MAX > Info Center**
- On the left side, find **Promotions**
- Under **Promotions**, select the subcategory **2022 Spring Promotion**

To download Ad Images:

- **MAX > Image Library**
- On the left side, find **Ad Images**
- Under **Ad Images**, select the subcategory **Promotional**

*Customizable (add your logo/contact information) templates and digital banner ads can be found under **Create An Ad**, located at the top left in the toolbar at the top in MAX (see below).*



- Advertising materials are available in a pre-written or customizable form through ComfortSite > Marketing Center > MAX.
- All advertising for this Plan must adhere to the guidelines defined herein and by the Distributor. Advertising that does not follow these guidelines will NOT be eligible for Trane funding.
- All advertising must include plan sales dates. This may be in the body of the ad or the disclaimer.
- Dealers and Distributors are encouraged to use the pre-approval review process within MAX to ensure co-op eligibility prior to placing the advertisement.

DISCLAIMER

PROMOTIONS WITH NATIONAL CONSUMER REBATE MUST MENTION THE FOLLOWING:

**See your participating independent Trane Dealer for complete program eligibility, dates, details and restrictions. Available through participating independent Trane Dealers. Special rebates from \$75 up to \$600. All sales must be to homeowners in the United States. Void where prohibited. Valid on Qualifying Equipment only. Offer expires 5/31/2022.*

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DEALER ADMINISTRATION NOTES

- Participating Dealer must submit NCP claim(s) at Trane Dealer Rewards, which is accessible at **ComfortSite > Marketing Center > Trane Dealer Rewards**.
- Requires valid Dealer information on ComfortSite.
- Requires Dealer to complete the Trane Dealer Rewards registration process and Dealer must accept the Terms and Conditions prior to participating in the program.
- Dealer Sales are validated based on the following:
 - Serial Number(s). Serial Number(s) for all Qualifying Equipment must be provided and must be valid Trane serial numbers
 - The Serial Number(s) submitted will retrieve the Model Number(s) and must Qualify for the promotion per Exhibit A
 - Sale Date must be within the Effective Period
 - Installation Date must be within the Effective Period
 - Homeowner First and Last Name must be provided and name on invoice must match claim entry
 - Installation Address must be provided
 - A legible Dealer Invoice for the Homeowner, with model number(s), serial number(s) and sale price to homeowner must be submitted with the claim
- Dealer sales can be submitted on Trane Dealer Rewards in bulk via the approved Trane Dealer Rewards Bulk Submission template.
- A Dealer owner/principal may designate an administrative proxy to submit sales on behalf of the dealership.
- Dealer must offer ALL components of this offer to the Consumer.
- Dealer must purchase equipment from Trane through the normal process utilizing existing pricing tier.
- All Qualifying Equipment must be offered to the homeowner during the Consumer Purchase Period, or the sale will be denied.
- All sales must be submitted via Trane Dealer Rewards during the Submission Period, or the sale will be denied. Once a sale is determined to be valid, it is deemed a claim.
- The Rebate amount, as shown in Exhibit A, must be given in full to the Consumer when the Dealer completes the sale.
- NCP Rebates are credited to Trane Dealers via a credit memo on a weekly basis.
- Trane funds the full rebate amount, per Exhibit B.
- Trane reserves the right to audit submitted claims at any time.

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EXHIBIT A

**Qualifying Equipment for
Trane Spring 2022 National Consumer Rebate**

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ELIGIBLE SYSTEM COMBINATIONS* FOR SPRING 2022 NATIONAL CONSUMER PROMOTION

Instant Rebate	Outdoor Unit	Indoor Unit			System Control
		S or L Series Furnace	Legacy Furnace	Air Handler	
\$600	XV20i System 4TTV0, 4TWV0	S9V2; S9V2-VS; L8V1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V	TAM9; TAMX*; TEM8; POVO**	Trane Smart Home Thermostat [^]
\$500	XV19 System 4TWL9	S9V2; S9V2-VS; L8V1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V	TAM9; TEM8; POVO**	
\$500	XV18 System 4TTV8, 4TWV8	S9V2; S9V2-VS; L8V1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V	TAM9; TAMX* TEM8; POVO**	
\$400	XL18i System 4TTX8, 4TWX8	S9V2; S9V2-VS; S9X2; S9X1; S8X1; S8X2; L8V1**; L9X1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V; XV80 TUD2-9V/TDD2-9V	GAM5; TAM9; TEM8; TEM6; POVO**	
\$200	XR17 System 4TTR7; 4TWR7	S9V2; S9V2-VS; S9X2; S9X1; S8X1; S8X2; L8V1**; L9X1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V; XV80 TUD2-9V/TDD2-9V	GAM5; TAM9; TEM8; TEM6; POVO**	
\$100	XR16 / XL16i System 4TTR6; 4TTL6; 4TWR6; 4TWL6; 4TTX6; 4TWX6	S9V2; S9X2; S9X1; S8X1; S8X2; L8V1**; L9X1**; L8X1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V; XV80 TUD2-9V/TDD2-9V	GAF2; GAM5; GMU/V; TAM9; TAM4; TEM8; TEM6; TEM4; POVO**	
\$600	XL16c Packaged Units 4VCZ6; 4WCZ6; 4DCZ6				

ELIGIBLE COMPONENTS* FOR SPRING 2022 NATIONAL CONSUMER PROMOTION

Instant Rebate	S or L** Series Furnace	Legacy Furnace
\$75	S9V2; S9V2-VS; S9X2; L8V1**; L9X1**; L8X1**	XC95(m) TUHM/TDHM; XC80 TUD2-V/TDD2-V

* Products are eligible based on availability and must be sold/installed/claimed during the Effective Period. No substitutions or exceptions are allowed. Eligibility based upon Trane comfort system configuration and use of Trane products. Substitutions using American Standard components are not allowed and will not be reimbursed. The TAMX Air Handler is subject to availability in select US markets and only matches up with the following outdoor units: 4TTV0, 4TWV0, 4TTV8, and 4TWV8.

** California, US Only

[^] Eligible Trane Smart Home Thermostats: TCONT724, TCONT824, TCONT850, TZON1050, and THUI2360 (the Trane UX 360 Smart Home Thermostat is compatible with Trane Link and available in select markets only)



EXHIBIT B

INSTANT REBATES AND CONTRIBUTION AMOUNTS

System/ Component	Instant Rebate	TCS Dealer Contribution	Trane Contribution
XV20i System	\$600	\$0	\$600
XV19 System	\$500	\$0	\$500
XV18 System	\$500	\$0	\$500
XL18i System	\$400	\$0	\$400
XR17 System	\$200	\$0	\$200
XR16 / XL16i Spilt System	\$100	\$0	\$100
XL16c Packaged System	\$600	\$0	\$600
Furnace-Only Component	\$75	\$0	\$75

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LEGAL REQUIREMENTS

THIS DOCUMENT CONTAINS CONFIDENTIAL, PROPRIETARY OR TRADE SECRET INFORMATION OF TRANE U.S., INC. IT MAY NOT BE DISCLOSED TO ANY THIRD PARTY WITHOUT PRIOR WRITTEN CONSENT FROM TRANE U.S., INC. OR ITS AFFILIATES. DISTRIBUTOR/DEALER MAY BE LIABLE FOR ANY UNAUTHORIZED DISTRIBUTION. *The information provided herein is considered confidential and proprietary information of Trane U.S., Inc., and its affiliates ("Trane"). It is provided for the sole purpose of permitting the recipient to promote Trane products and services. Recipient agrees to maintain the confidentiality of all proprietary, trade secret information, including confidential pricing data provided in this document. The Recipient hereby agrees that it will not at any time disclose this confidential information or material, in whole or in part, to any person or entity for any reason or purpose whatsoever, unless Trane gives its consent, in writing, to such disclosure, except as required by law. The agreement to maintain the confidentiality of this information extends to any employees, pre or future, involved in the work desired and who will have access to the information. These employees will hold the information in confidence in accordance with this agreement and use the information only in the performance of their employment. Recipient agrees to review this agreement and its terms with employees and will obtain their agreement with the terms of this agreement before providing them with any Trane confidential information.*

Amendments, Modifications, or Exceptions

Trane reserves the right to amend, modify, or cancel the program, or any portion at any time. Amendments are not effective unless they are published by Trane in formal Guidelines or are signed by an authorized Trane representative. Any exceptions to the program guidelines must be approved in writing by an authorized Trane representative.

No Other Obligation

Trane shall have no fiduciary duties or other special duties of any kind to any distributor/dealer under the program other than as expressly set forth in these guidelines.

Legal Liability

By participating in this program, each participating distributor/dealer warrants that its marketing programs and initiatives are in compliance with all antitrust pricing laws and federal/state/local regulations. Trane does not undertake any legal responsibility for the local management and execution of their marketing programs.

Document Retention

It is the distributors/dealers responsibility to maintain copies of supporting documentation and claim reimbursement paperwork for a minimum of 24 months after reimbursement. Prior to implementing any change in your record retention policies, please consult with your accountant and attorney to determine whether you need to retain these records for other business or legal purposes.

Claims Auditing

All reimbursements under the program are subject to audit. If reimbursement is received on any claim that is later determined to be ineligible, the distributors/dealers account will be either be debited or invoiced in the amount of the ineligible claim plus reasonable and customary expenses incurred for conducting the audit.

Program Violation

Violation of these guidelines may result in termination of the applicable Distributor Agreement or Dealer Sales Agreement or any portion thereof, including but not limited to an immediate revocation of any and all rights to use or display Trane intellectual property (logo's, trademarks, creative).

Financial Status

Eligibility for program and reimbursements are contingent upon Distributor/Dealer having an executing Distributor Agreement or Dealer Sales Agreement on file and their account being active and in good standing/current as determined solely by Trane.

Privacy Policy Disclosure Statement

As part of this program and within Trane's sole discretion, Trane collects various information to support its development and delivery of quality products, services, and programs to its consumers. In order to ensure that Trane programs are provided and that proper quality in service is achieved, Trane may from time to time directly contact homeowners who purchase Trane products or services to survey customer satisfaction, to evaluate homeowner's reactions to an interest in Trane products and services, and to conduct research activities. These surveys are a result of such things as independent dealer programs, product registrations, extended warranties, etc. and may be provided to you for the homeowner's future purchase of Trane products and services. Any information received or obtained by Trane will be held in accordance with Trane's privacy policy, which may be obtained at www.trane.com. Trane may from time to time also directly contact homeowners when requested by the homeowner, when required by contract or law, or when a registered homeowner has not received all available coverage for its Trane products.

Termination

This sales plan is subject to termination or modification at any time by Trane.



SALES OFFICE ADMINISTRATION NOTES

- Distribute Sales Plan to Eligible Dealers.
 - The legal page of this document must be included in all local plans, along with the Regulatory and Disclaimer Information above.
 - Edit local contact information/etc. as required.
- The electronic Terms and Conditions contain all legal requirements and content of the traditional paper Dealer Participation Agreement. Sales Offices, at their discretion, may choose to collect and retain a signed paper Dealer Participation Agreement.
- Agree to assist Trane in any/all audits of claims.
- Upon termination/expiration of a Dealer Agreement, funds will be forfeited.
- Trane reserves the right to suspend a Dealer from participation in the program, or to terminate any Dealer's participation in the program, including but not limited to, the following circumstances for TCS Dealers the Dealer violates the rules of the program; a Dealer engages in conduct that is deceptive or fraudulent, or not in compliance with any federal or state law or regulation; or the Dealer violates the terms of the Dealer Agreement. Trane's decision shall be final in all matters relating to the interpretation of program rules and guidelines. In such cases, Trane also reserves the right to require forfeiture of Trane funds and debit applicable accounts and/or invoice the Dealer directly.
- Dealer Participation Agreements must be managed locally. The electronic Terms and Conditions, accepted by the dealer during registration on Trane Dealer Rewards contain all legal requirements.

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