Trane MAP™
User Guide

Learning Resources

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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 ComfortSite™ at:

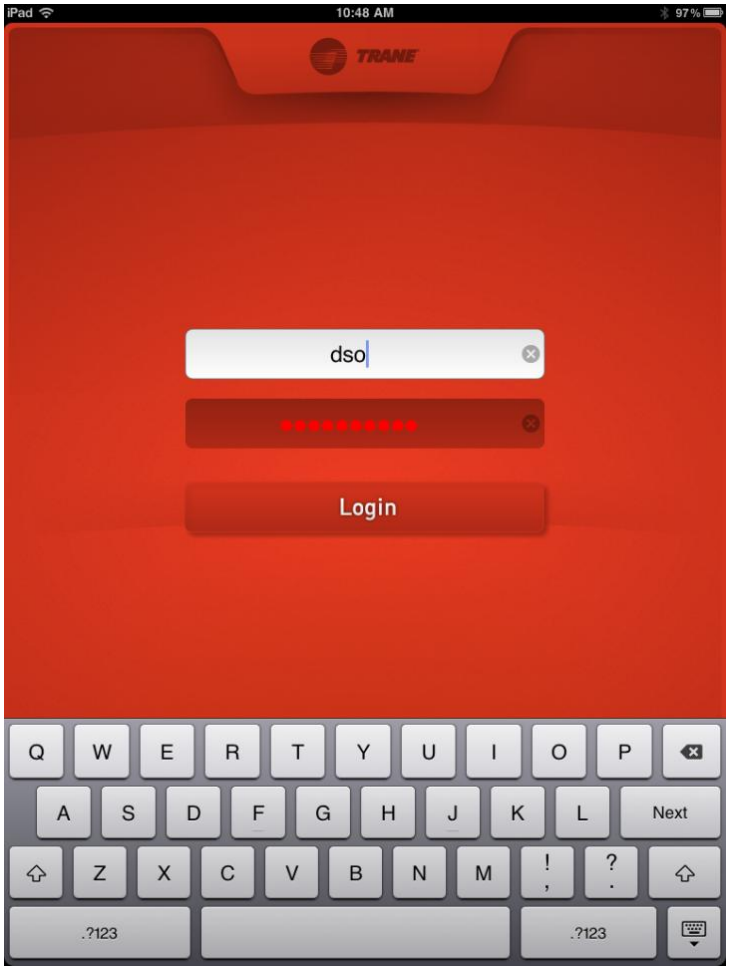
https://msit.comfortsite.com/maps

Notes

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.



Notes

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

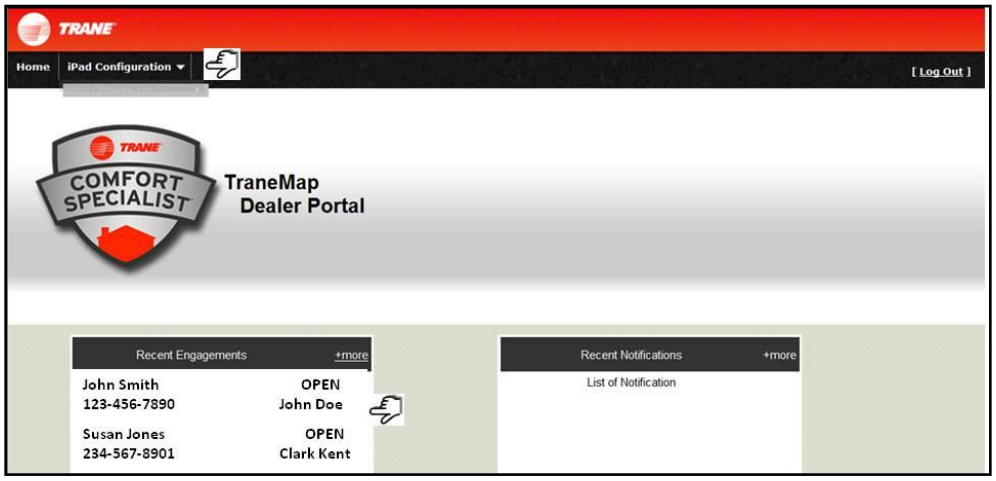
Setting Your Preferences

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



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

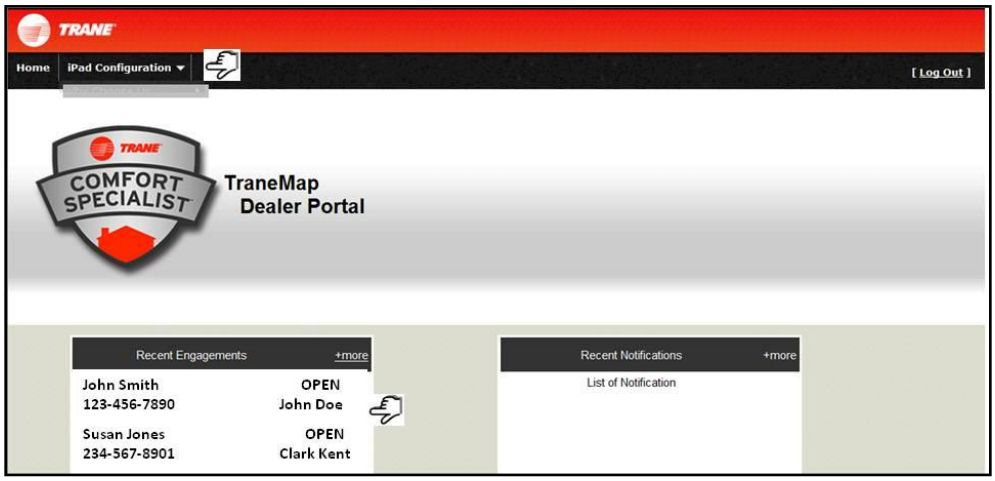
You will be asked to enter your ComfortSite ID and password on the first screen.

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

- Home
- iPad Configuration

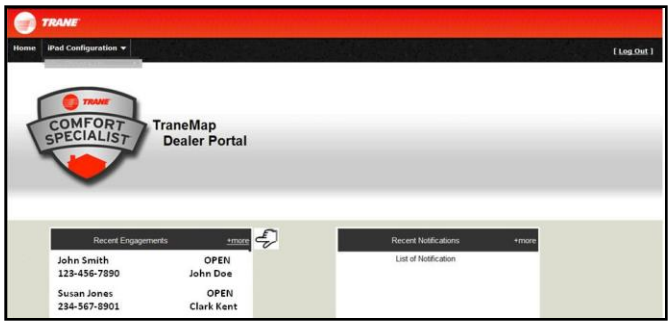
In the middle of the page are the reports that are available:

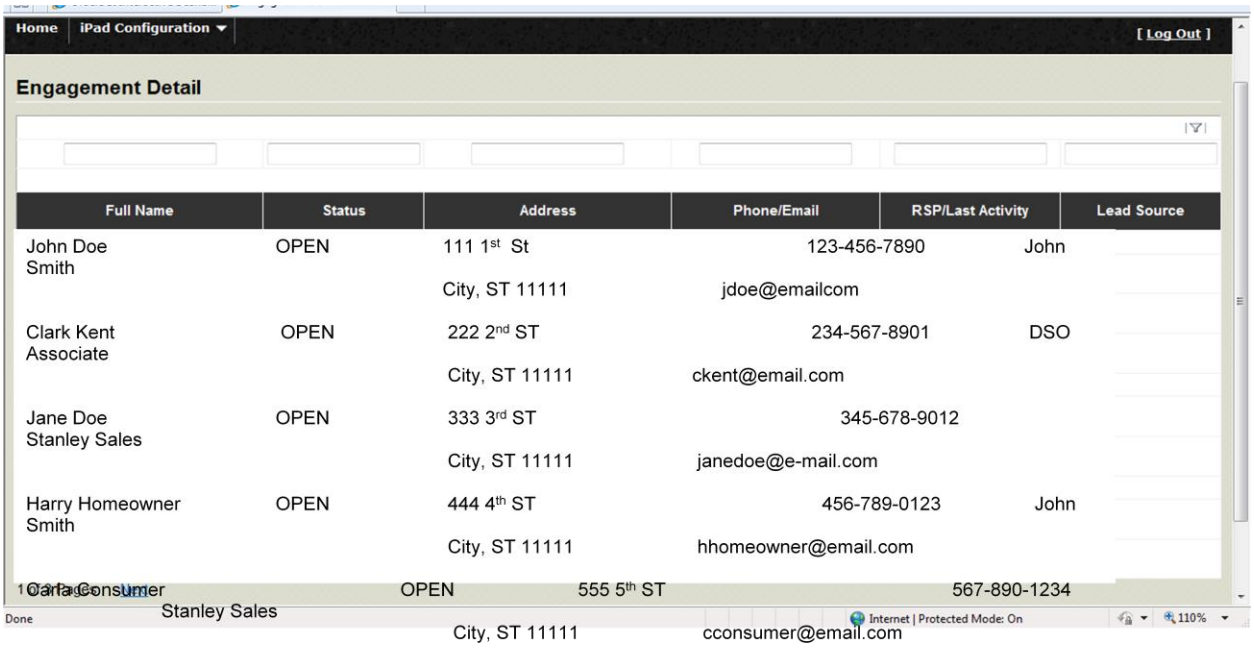
- Recent Engagements
- Recent Notifications



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

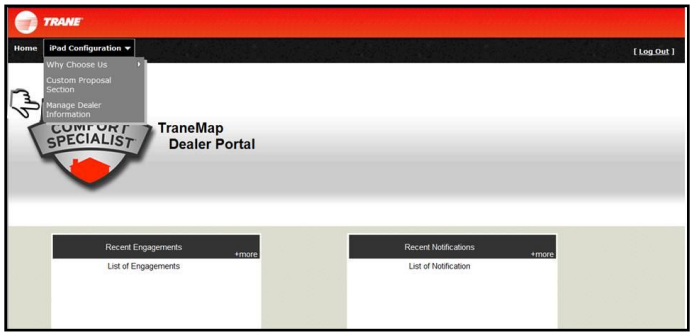
Clicking on the '**+more**' button provides greater detail on the engagement including contact information, status and lead source.





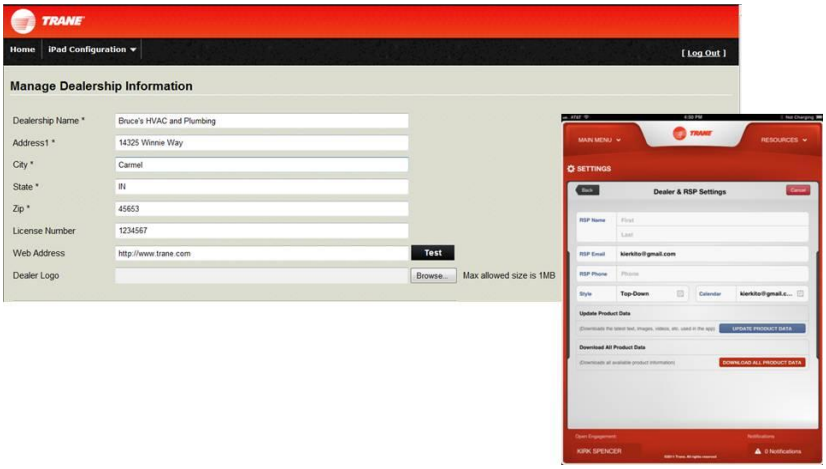
Manage Dealer Information

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.



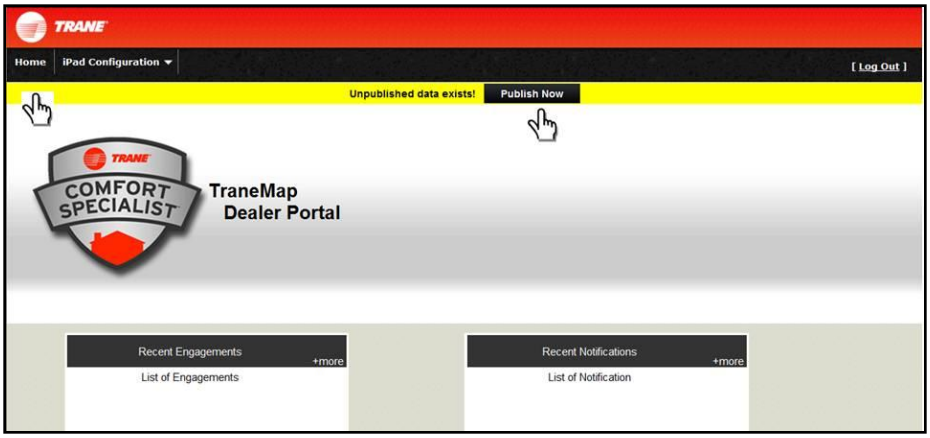
Notes

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

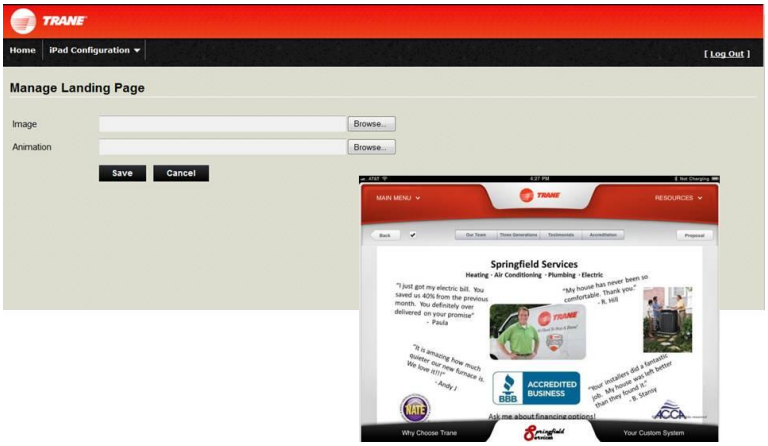
New Features:

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

Landing Page

Click on '**iPad Configuration**' and scroll to '**Why Choose Us**'. Select '**Landing Page**' from the menu.

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



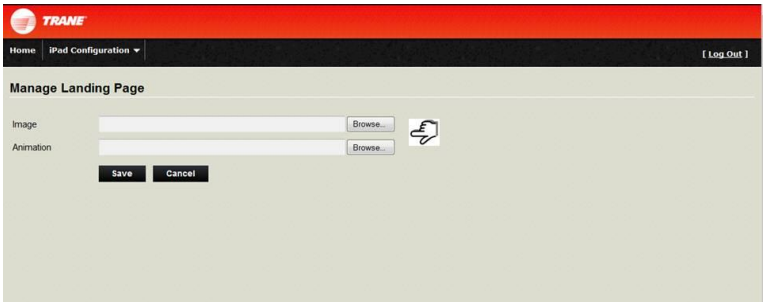
You can have both an image and a video on your landing page.

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

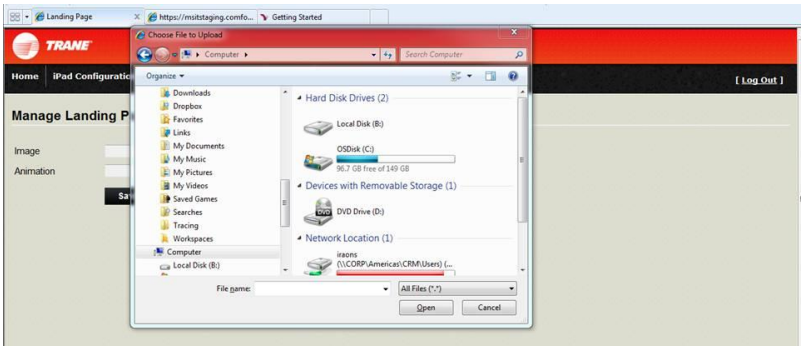
Notes

Ideal image pixel size is 1014 x 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.

NOTES

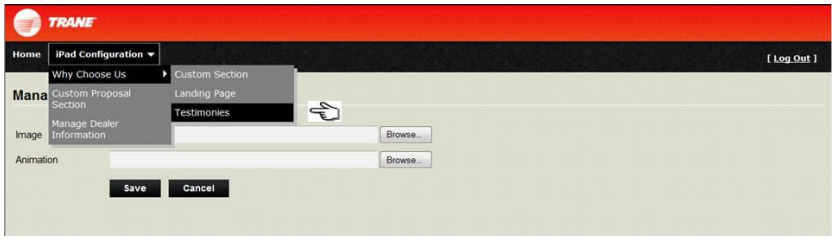
Specifically the iPad supports:

- H.264 video up to 1080p, 30 frames per second, High Profile level 4.1 with AAC-LC audio up to 160 Kbps, 48kHz, stereo audio in .m4v, .mp4, and .mov file formats
- MPEG-4 video up to 2.5 Mbps, 640 by 480 pixels, 30 frames per second, Simple Profile with AAC-LC audio up to 160 Kbps per channel, 48kHz, stereo audio in .m4v, .mp4, and .mov file formats
- Motion JPEG (M-JPEG) up to 35 Mbps, 1280 by 720 pixels, 30 frames per second, audio in ulaw, PCM stereo audio in .avi file format

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

Testimonies

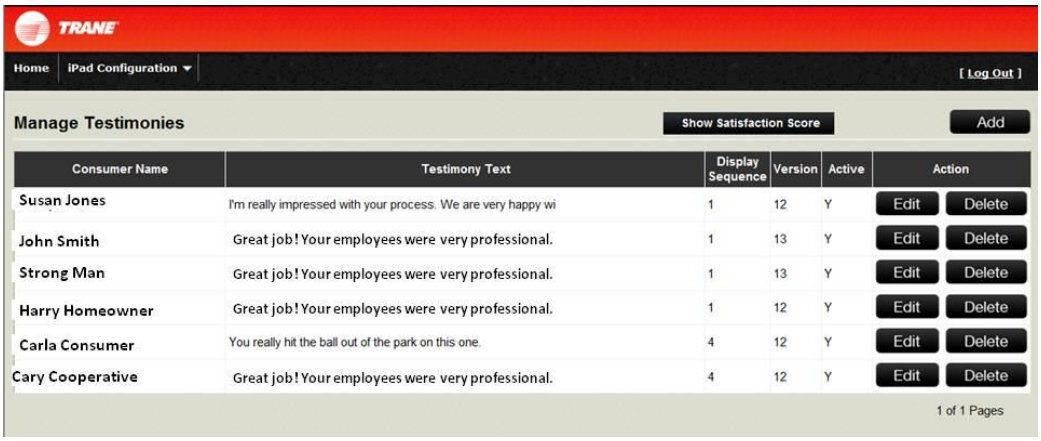
Add customer testimonials by selecting '**Testimonies**' from the Why Choose Us menu.



NOTES

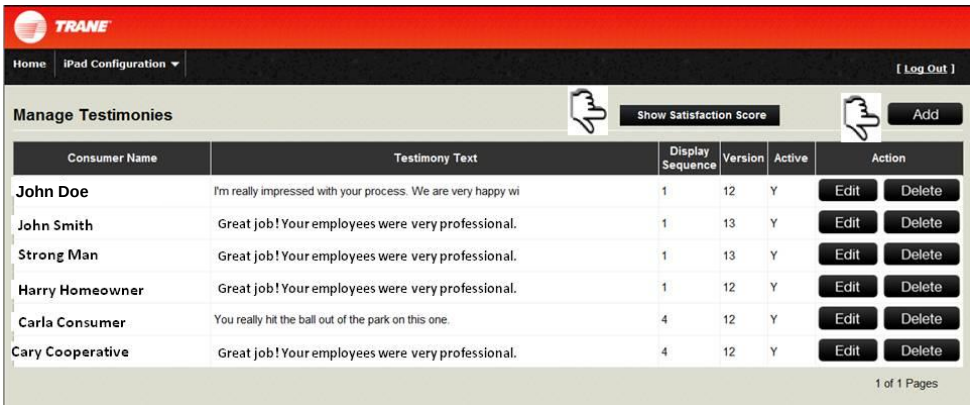
This text will display as the 2nd item in the drop down list of custom pages.

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

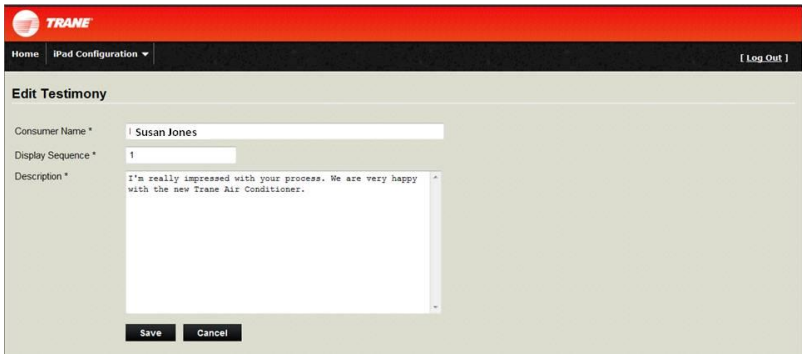


If you want the customer satisfaction score to display you can select that option on this screen.

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



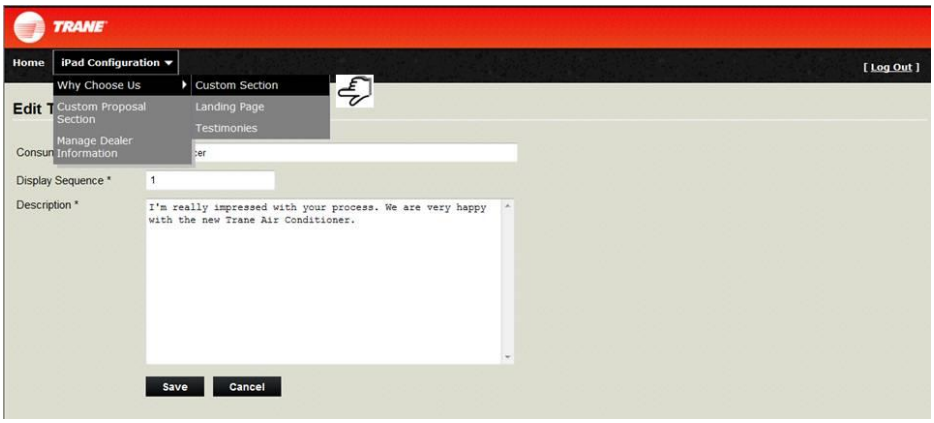
To add new testimony, complete the following:



- Customer's Name
- Display Sequence: (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

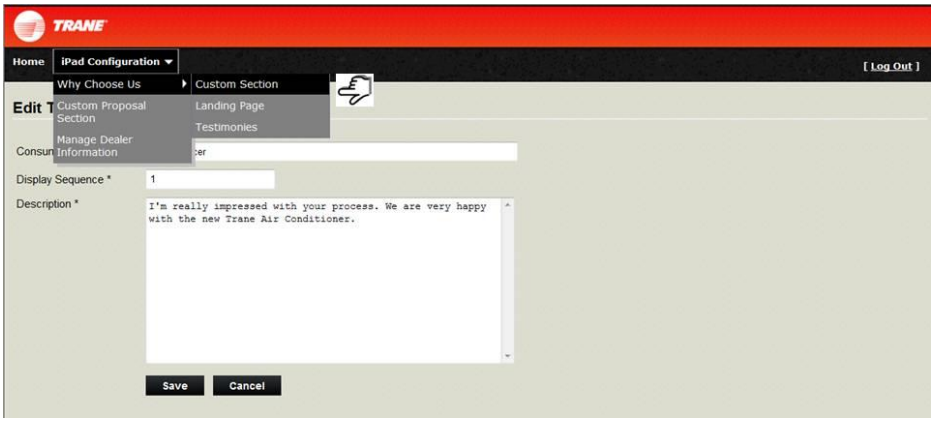
Click '**Save**' when you have completed this screen.

Custom Section

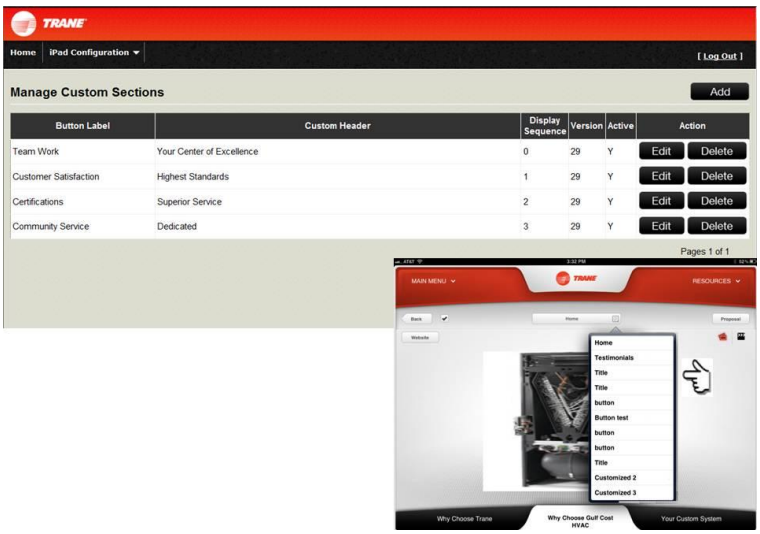


The Custom Section allows you to add information about your business and what makes it the one they want to do business with.

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.



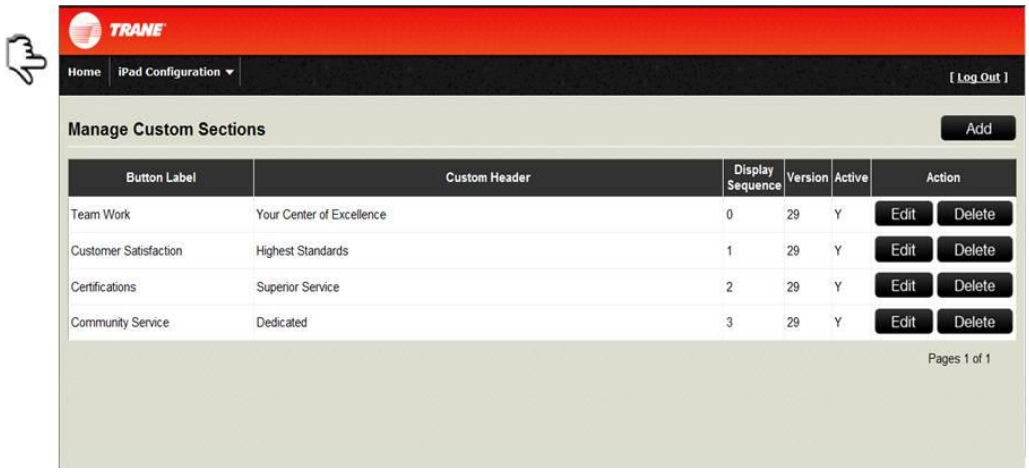
Some ideas for sections you may want to create:

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

Click '**Save**' when you have completed this screen.

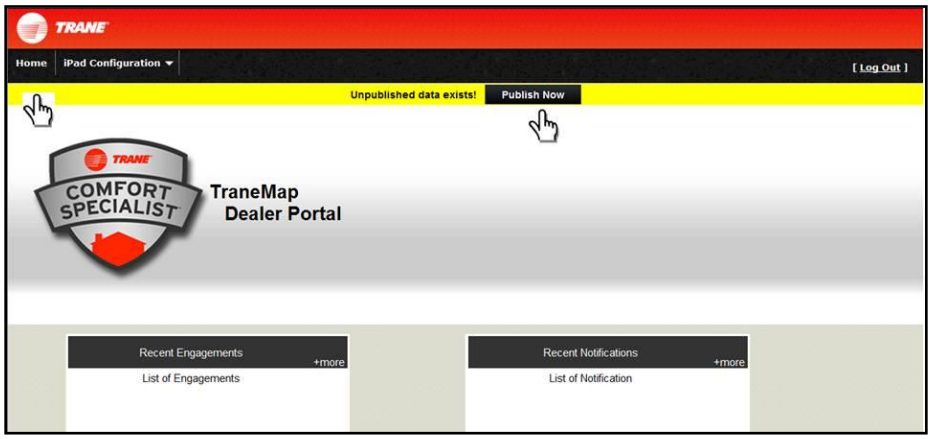
Publish

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



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.

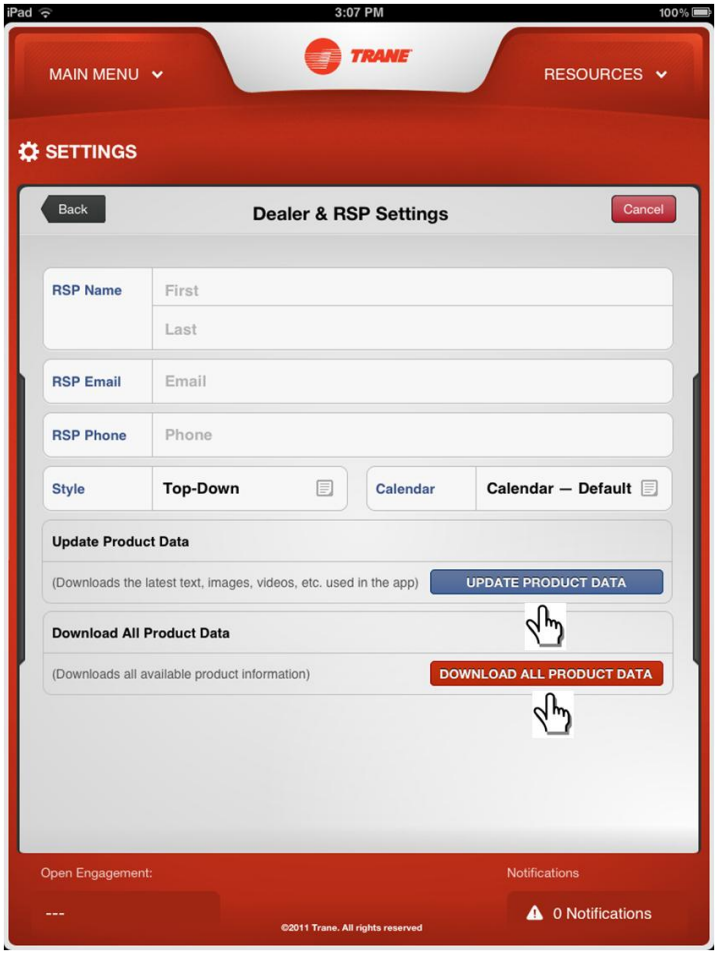
Trane MAP Settings

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 MAP™ application for your business we will first look at the RESOURCES menu.

In the drop down menu you will see links to:

- ComfortSite™
- Settings
- Energy Savings Calculator
- Trane Financing
- Log Out

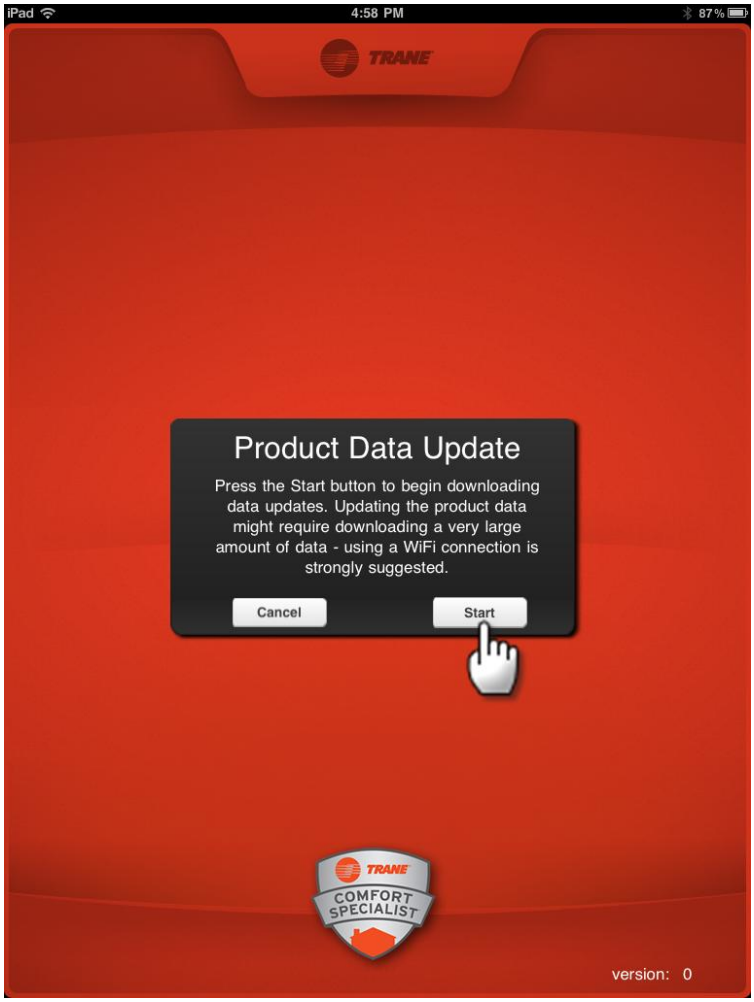
Tap on the '**Settings**' link in the '**RESOURCES**' menu. On the Settings page you will enter the RETAIL SALES PROFESSIONAL information.



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.

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.



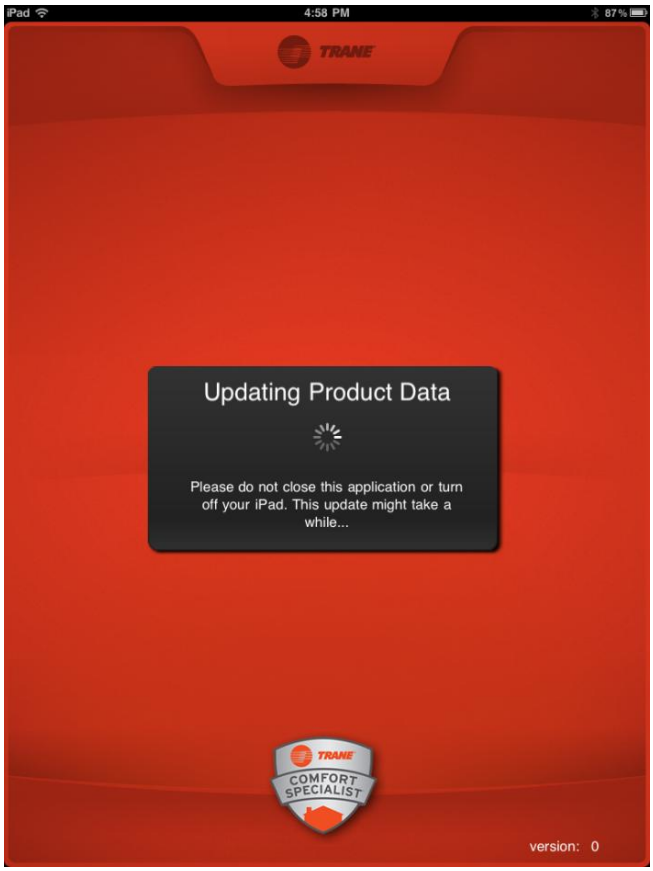
Notes

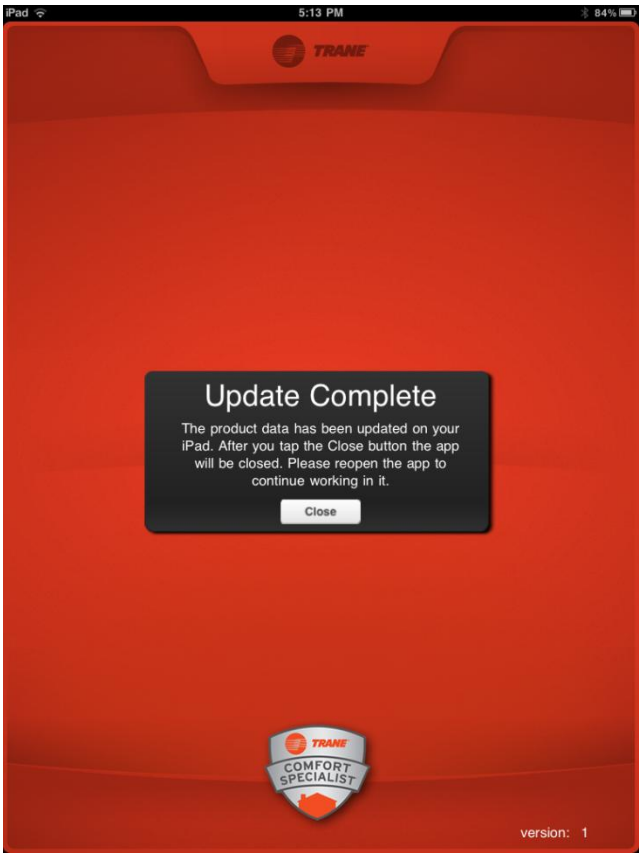
We recommend that you use a WiFi connection to update the product data.

- 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.

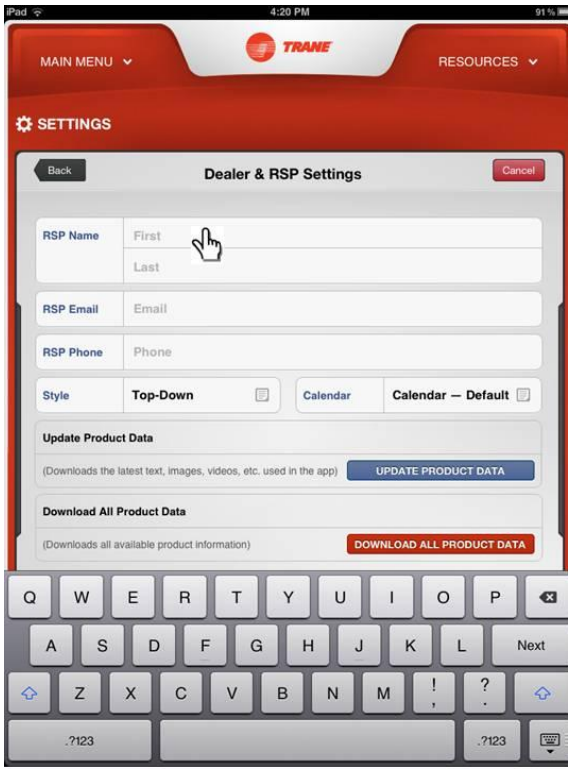




When the update is complete a confirmation screen will appear. The program will automatically close. Simply reopen the application to resume. This will only need to be done when you receive a notification to update your product data.

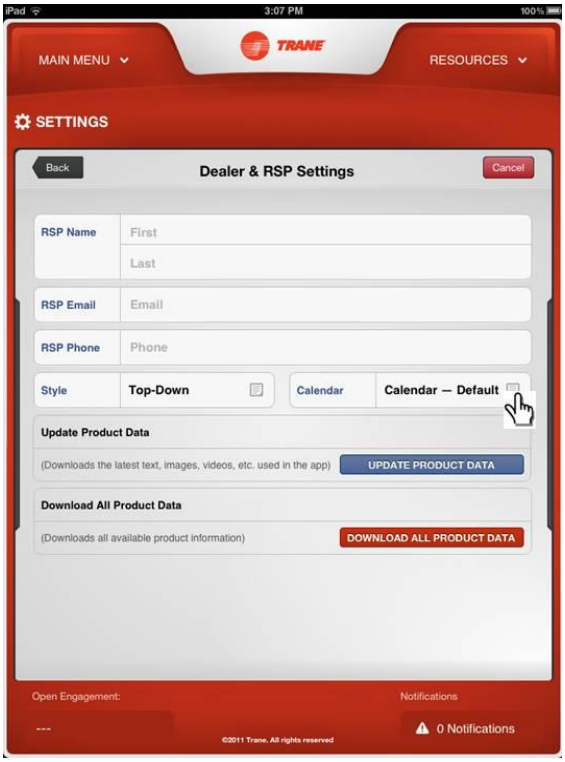
Once you have reopened the application, go back to the RESOURCES Menu. Tap on the SETTINGS tab and the screen will open back at the Dealer and Retail Sales Professional (RSP) Settings page.

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



Notes

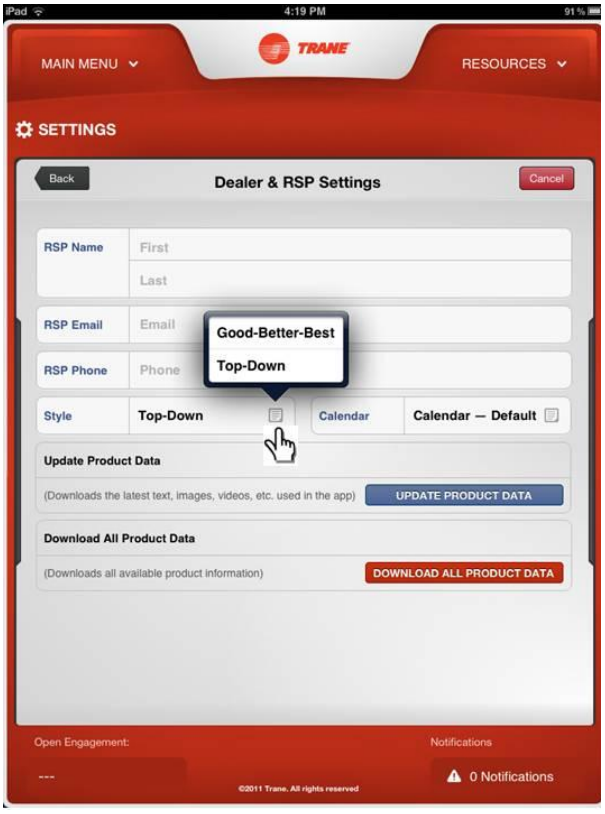
The NEXT key on the keyboard will tab you to the next field for date entry. You may however continue to touch on any field you wish to edit.



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

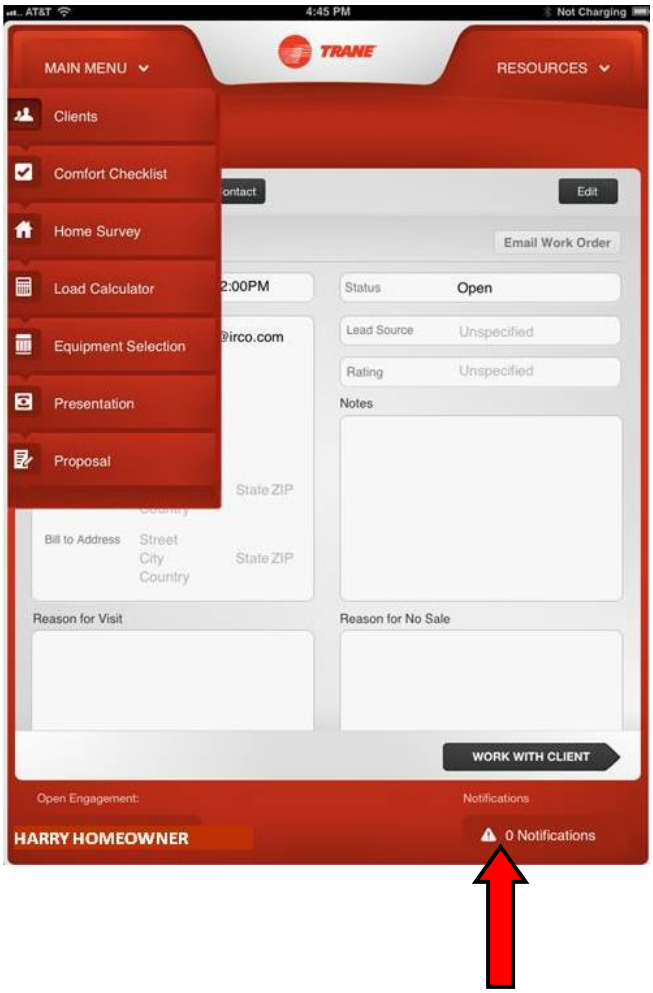


You will also want to select the selling style that you find most comfortable. You may choose Top Down or Good-Better-Best. This choice will be reflected in your presentation and proposal style.

Main Menu

Now it's time to walk through the sales modules. From the Trane MAP™ 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.



Notes

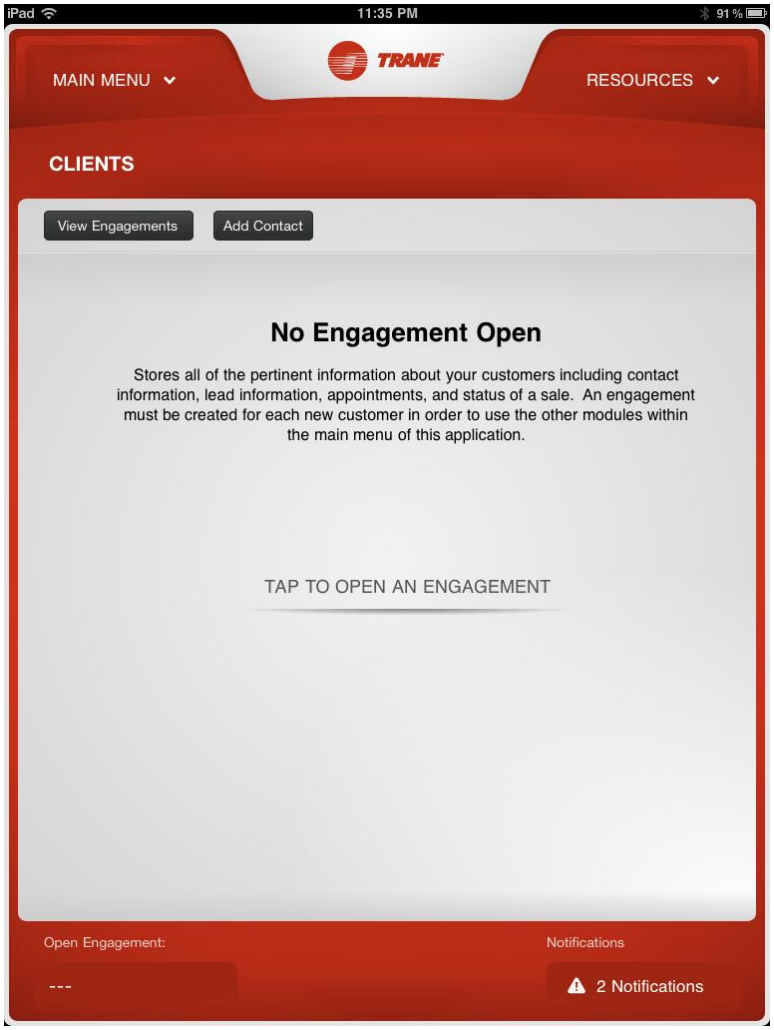
A Notification Icon will display at the bottom of the page to indicate data updates that need to be applied. *See arrow above.*

Clients

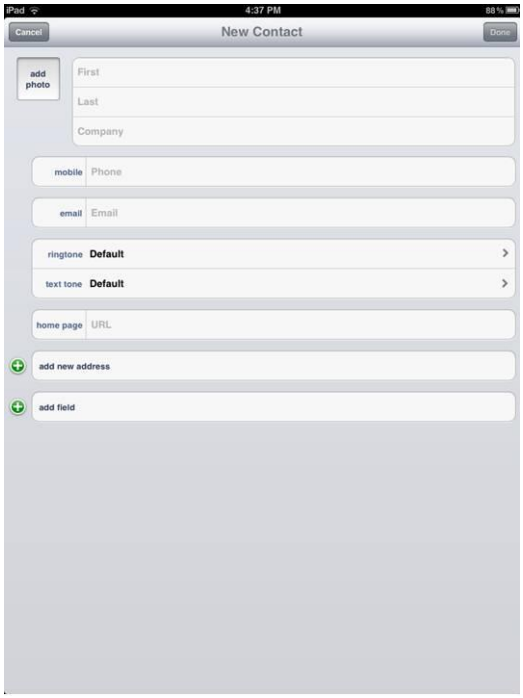
Taping the CLIENTS tab will open the Client Engagement landing page. On this page you have two options. You can tap the screen to open an existing engagement or you can add a contact.

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.

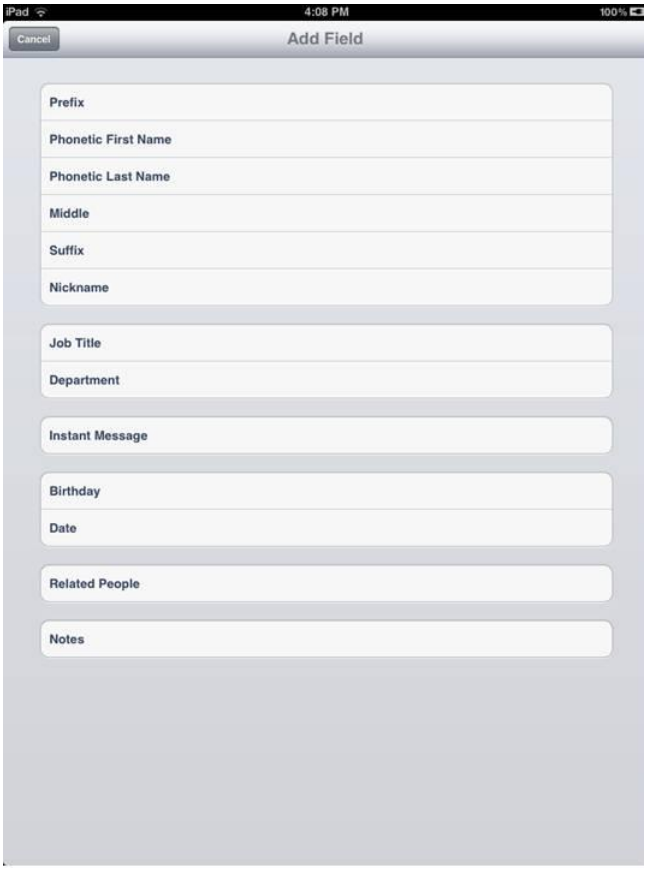


To add a contact, tap on the '**Add Contact**' Button. The Screen will open a New Contact Data Base and you will add the client information.



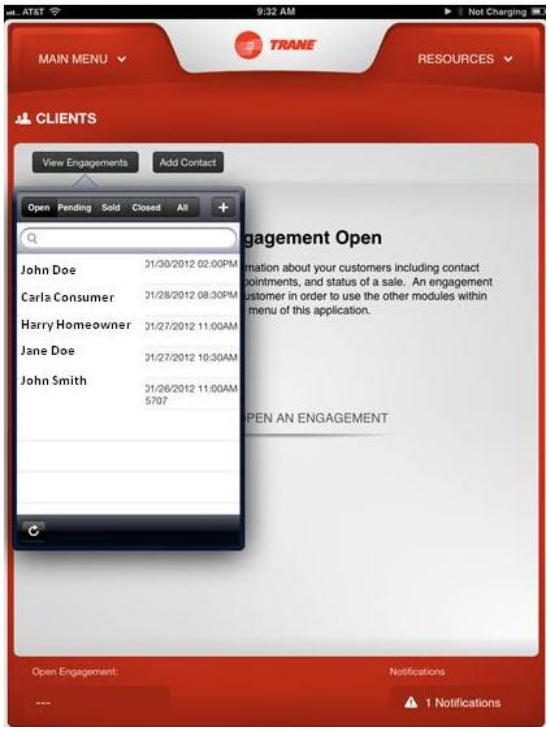
This will add a new contact to your contact list associated with the calendar you defined in setup.

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 second address can be added as the bill to address.



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.



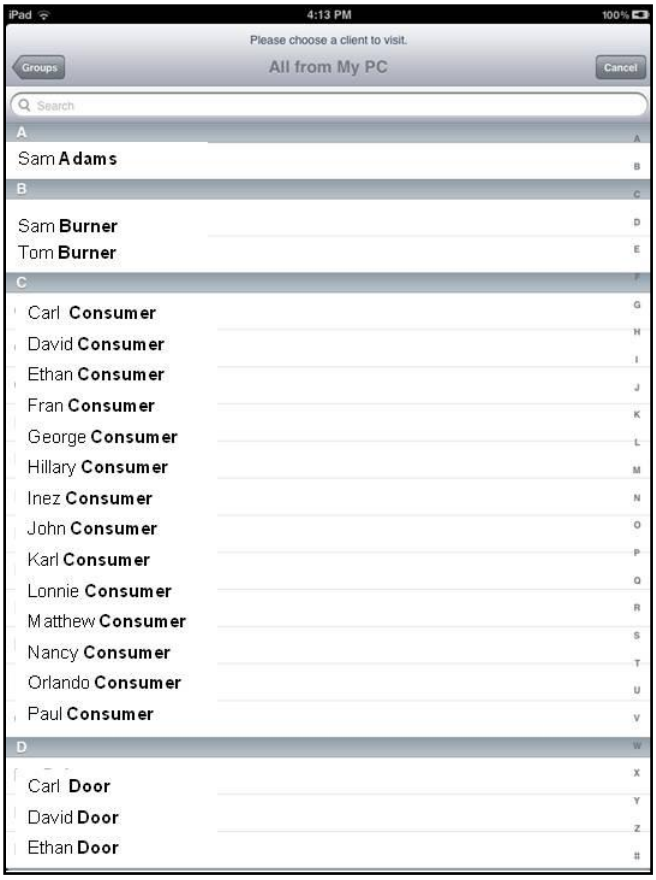
The engagement list can be sorted by status.

To open an engagement, tap on the selected client.

Notes

Engagements will only be displayed if it is not a recurring meeting and the contact has an email address defined in the contact list.

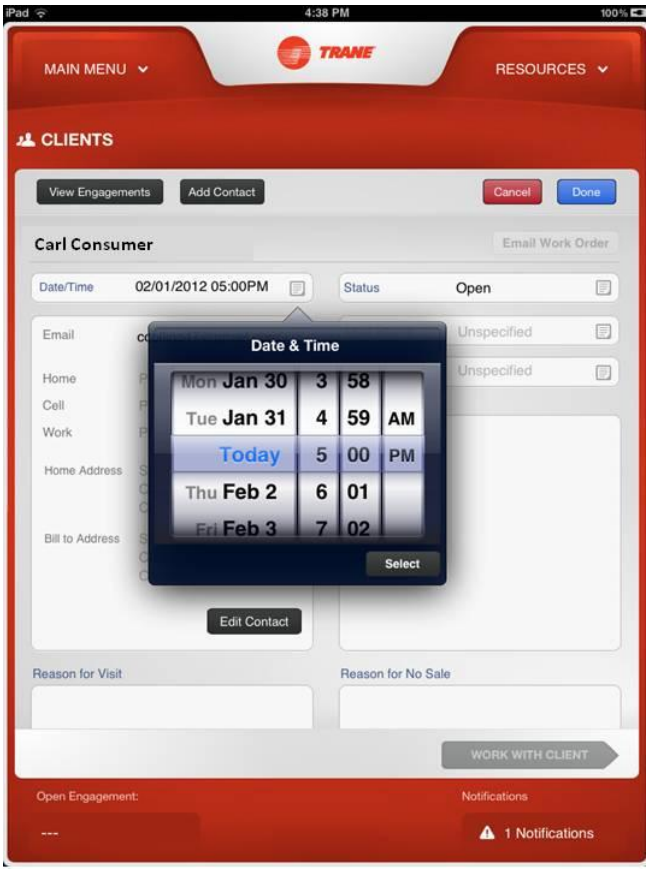
To create an engagement from your contact list, tap the plus sign at the top of the View Engagement Screen.

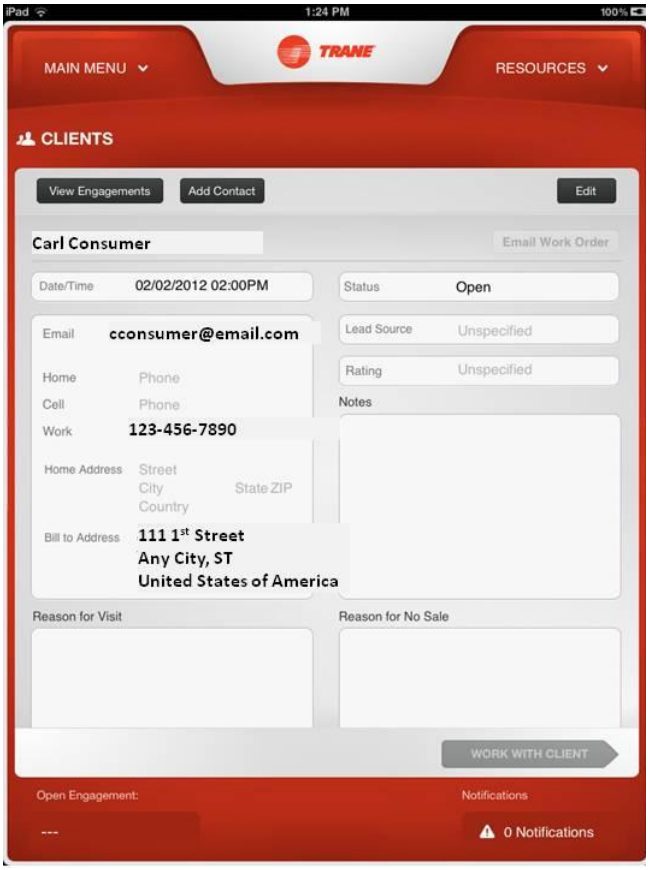


Your contact list will display and you can select the client by tapping on the name.

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.

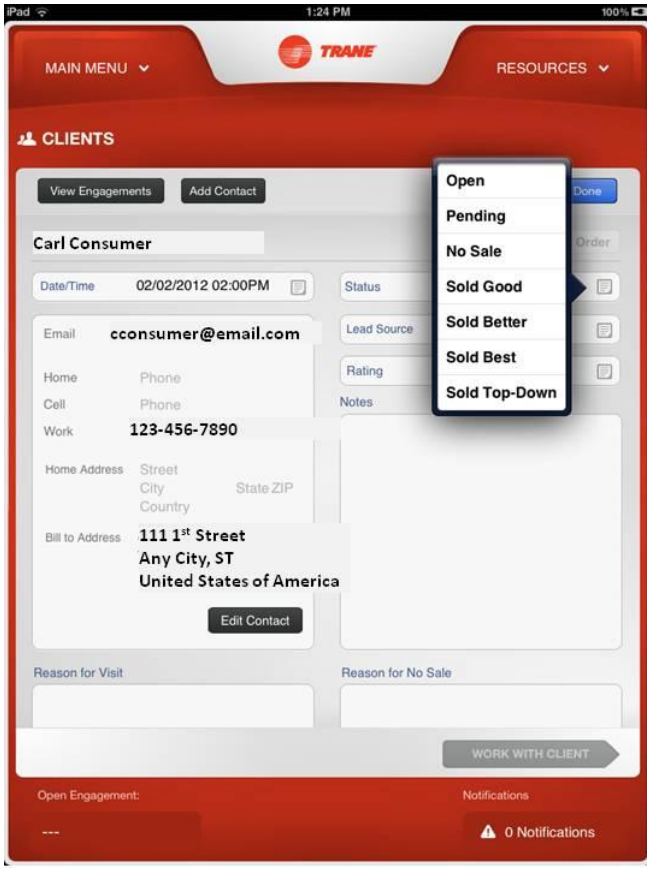
Defining an engagement will automatically add the appointment to your calendar.

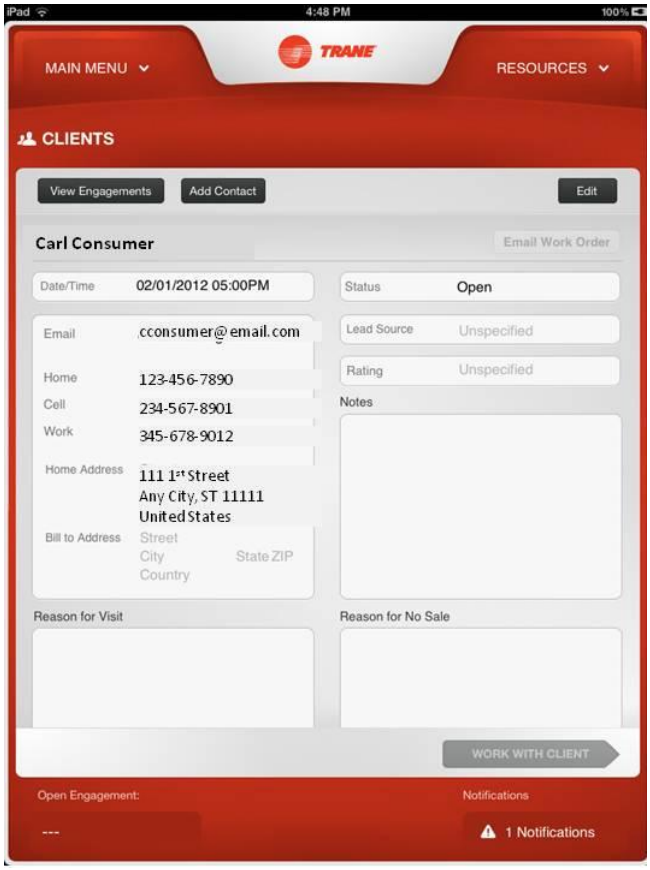




Once an engagement status has been changed to '**Sold**' a work order can be e-mailed.

The status options are: Open, Pending, No Sale, Sold Good, Sold Better, Sold Best and Sold Top-Down.



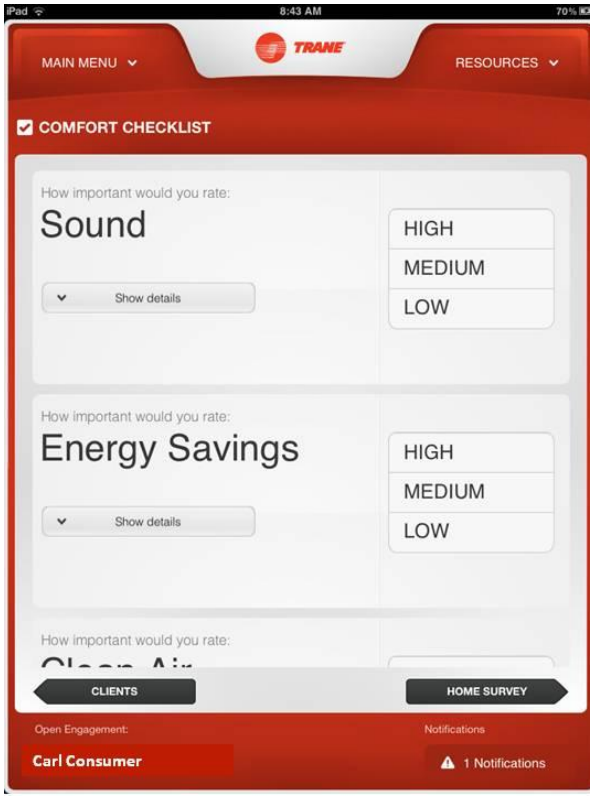


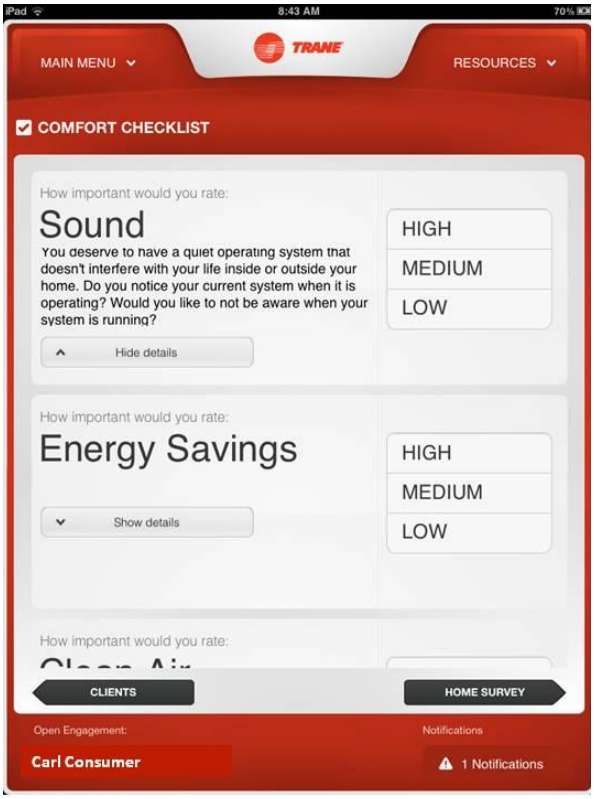
Once you have edited your Client information, tap the '**Done'** button and then tap the '**WORK WITH CLIENT**' arrow.

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.





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.

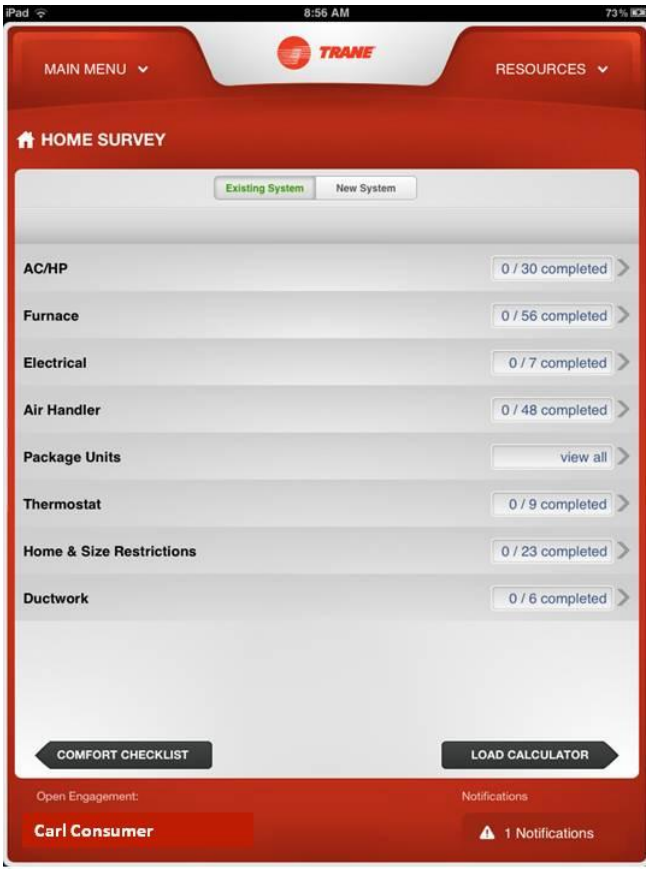
Notes

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.

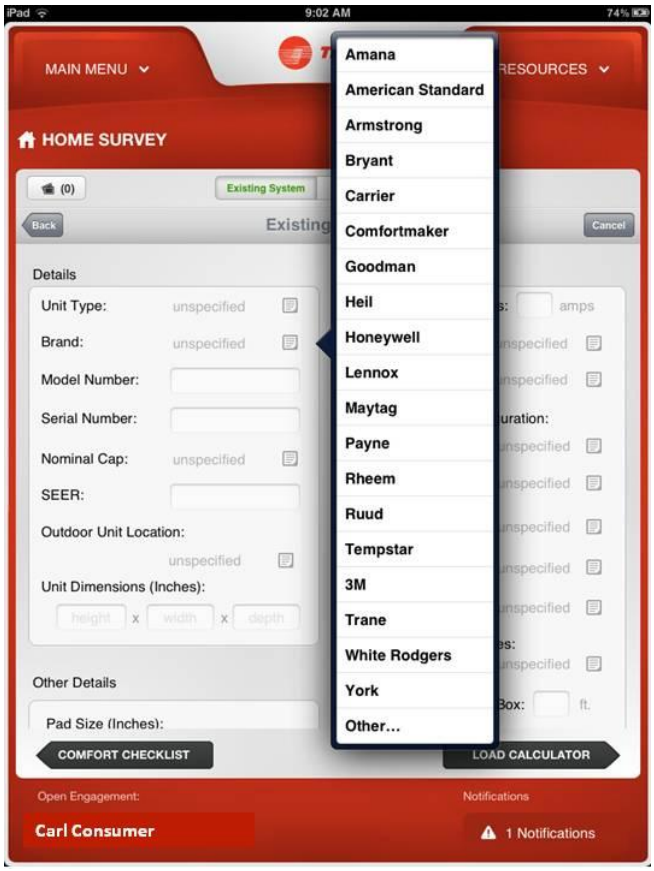


Notes

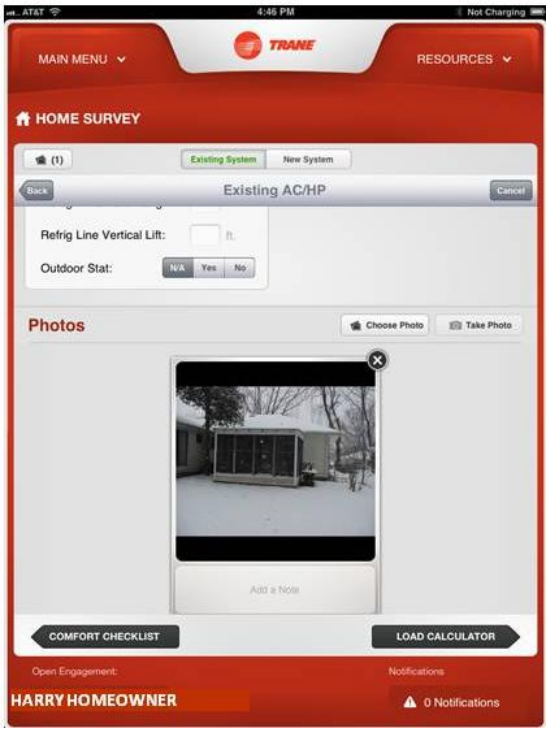
Information that is entered into the '**Existing System**' tab can be transferred to the '**New System**' tab. There is no need to re-enter data.

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.

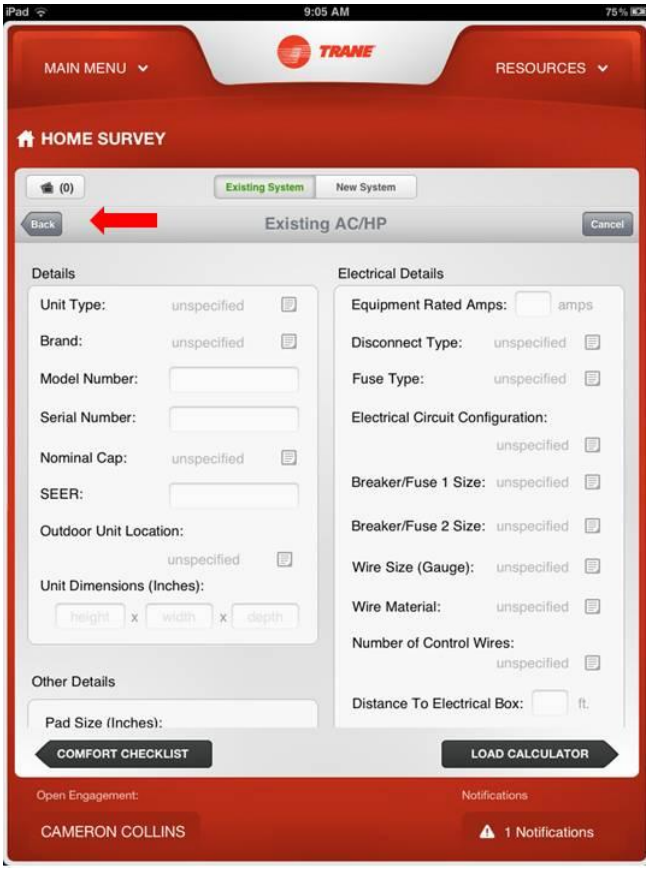


Images can be added to the Home Survey. Simply go to the 'Existing System' or 'New System' pages and scroll to the bottom. You can add photos by taking them directly from an iPad2, or you can import them from pictures you have stored on your iPad.



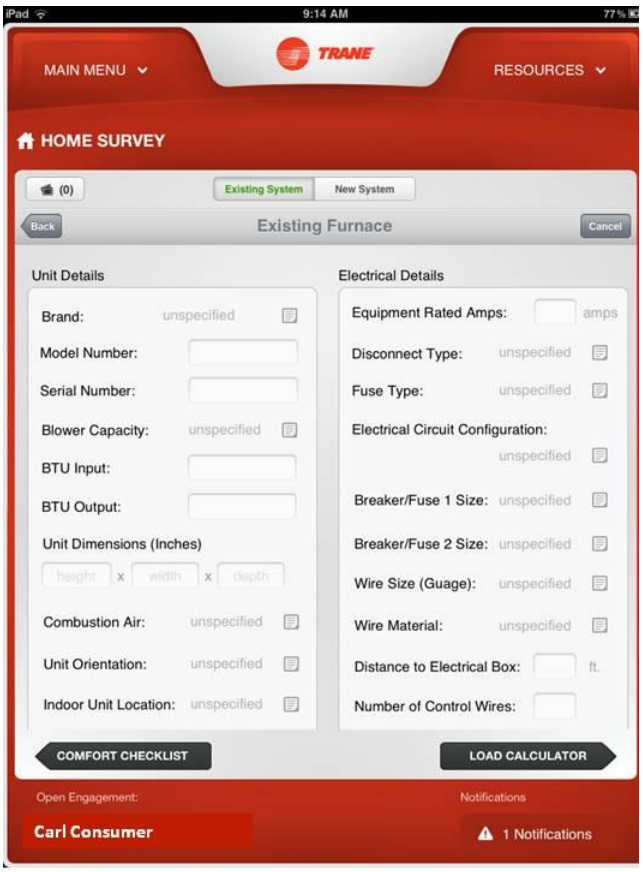
If you take photos from an android smart phone you can share them to your iPad by using a 3rd party tool like Dropbox to push the picture to your iPad. If you have an iPhone the Apple iCloud will sync any photos from your iPhone to your iPad automatically.

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.



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.

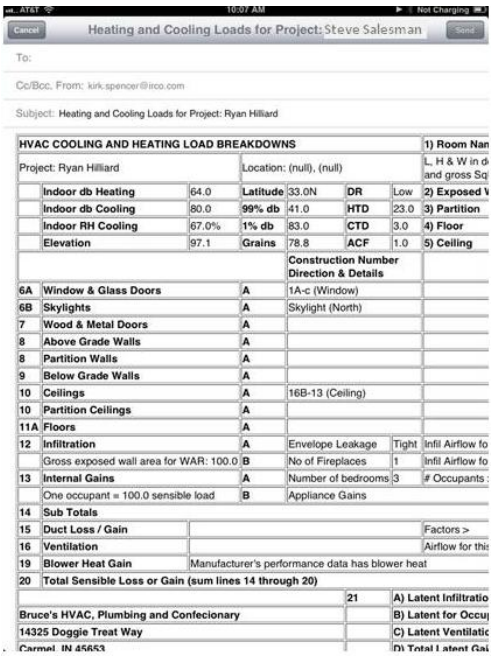
Notes

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:

http://www.carmelsoft.com/Software/Software_Mobile_iPad_HVACResLoadCalcsHD_Help.aspx.



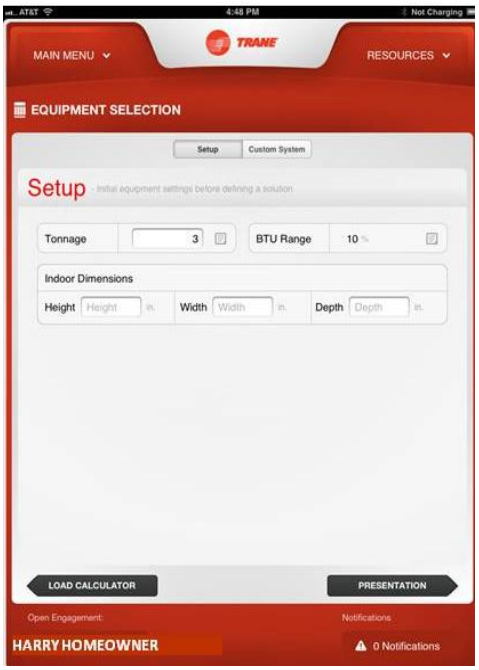
From the CarmelSoft Load Calc Module you can email a report by clicking on the grey pie chart in the upper right corner.

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.

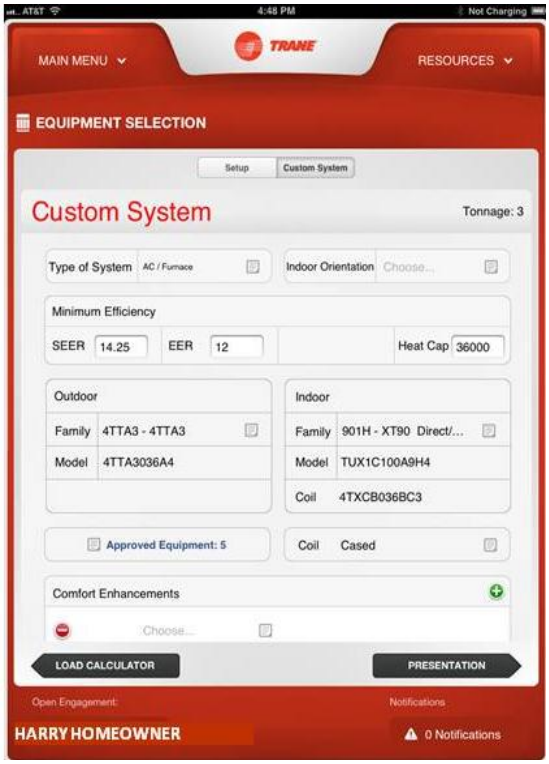
- Entering in a 3 Ton unit and setting the BTU range to 10% allows furnaces with BTUs from 32,400 to ~39,600 instead of locking in to 36,000 BTUs

Notes

Indoor dimensions restrict the list of indoor units.

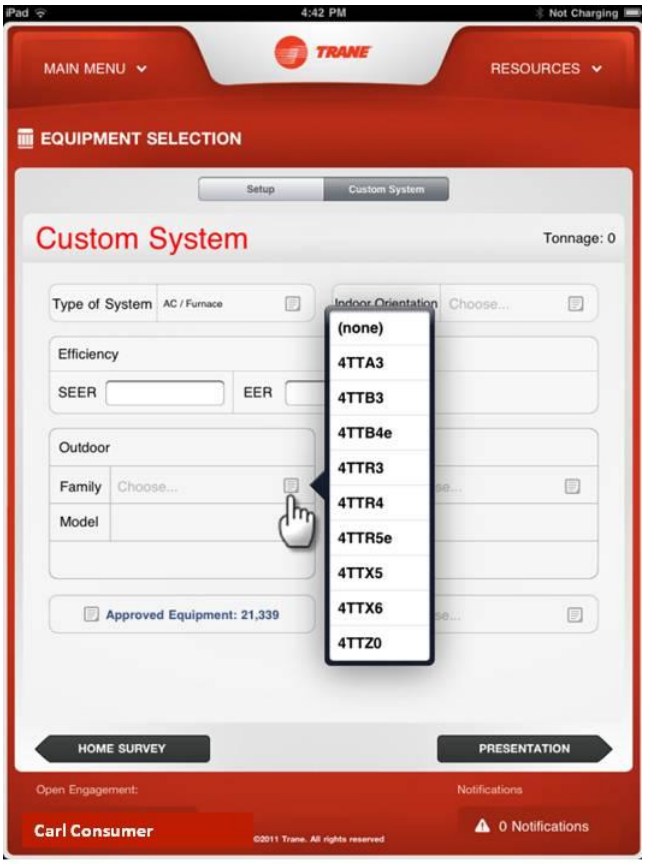
- Size pertains to the size of the indoor space (i.e. closet size, basement size, or crawlspace size), *not* the system itself
- If you go to your custom section and find there are no matched systems, try to remove the values in the dimensions and then go back to select your equipment

Next you will select the Custom System tab.



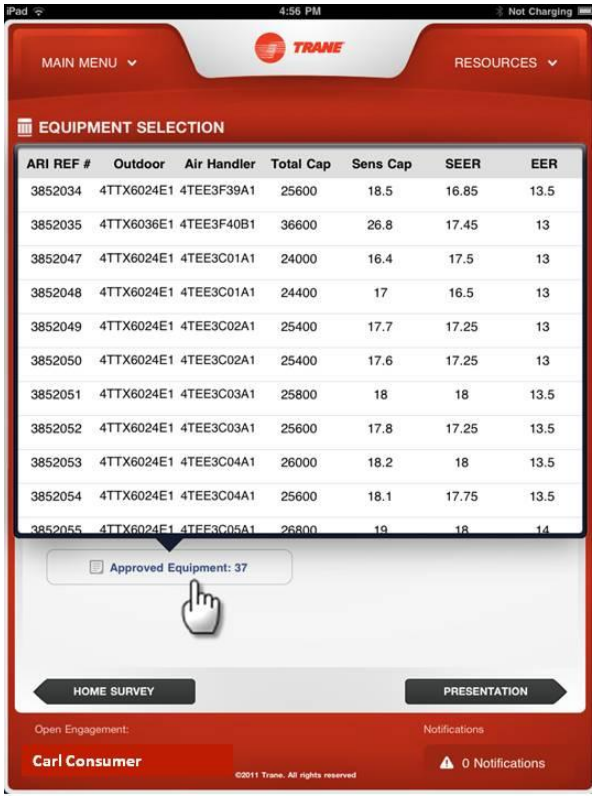
From this screen you can enter the type of system and SEER or EER. These selections will narrow the search parameters and Trane MAP™ will only pull approved AHRI combinations that match that criteria.

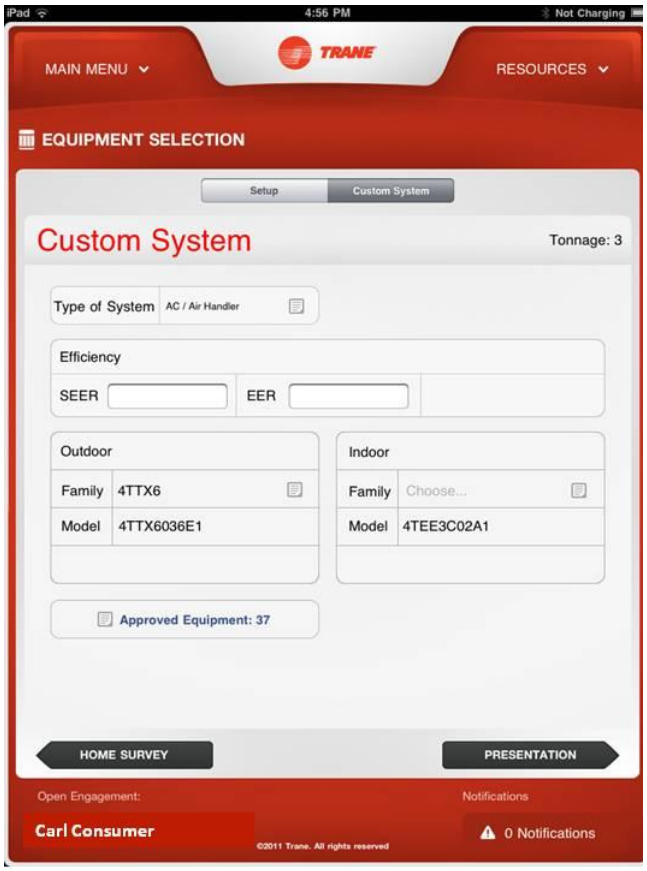
On the Custom System and Good/Better/Best screens if entering in a furnace you may limit the approved equipment by entering in a Heating Capacity.



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.

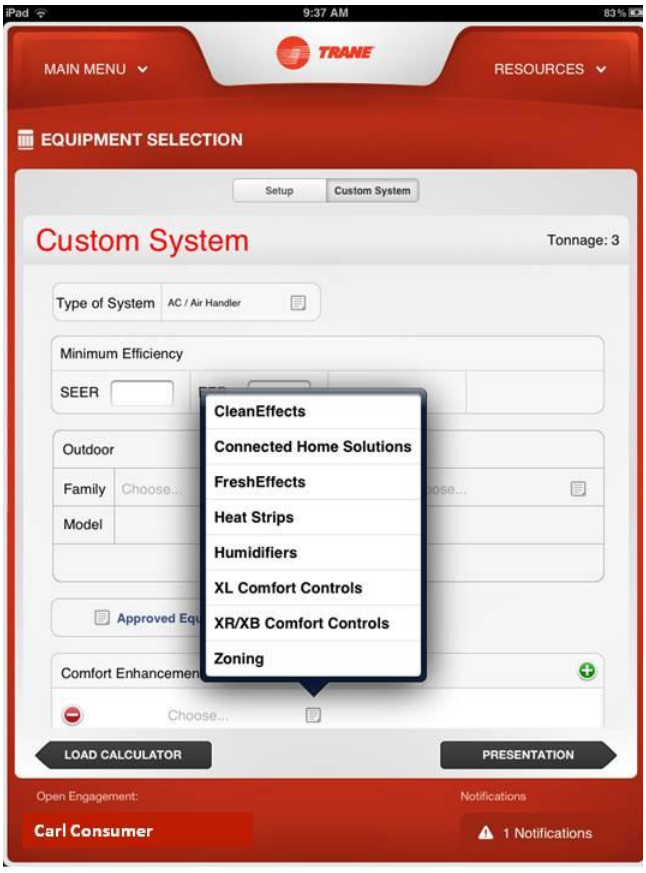




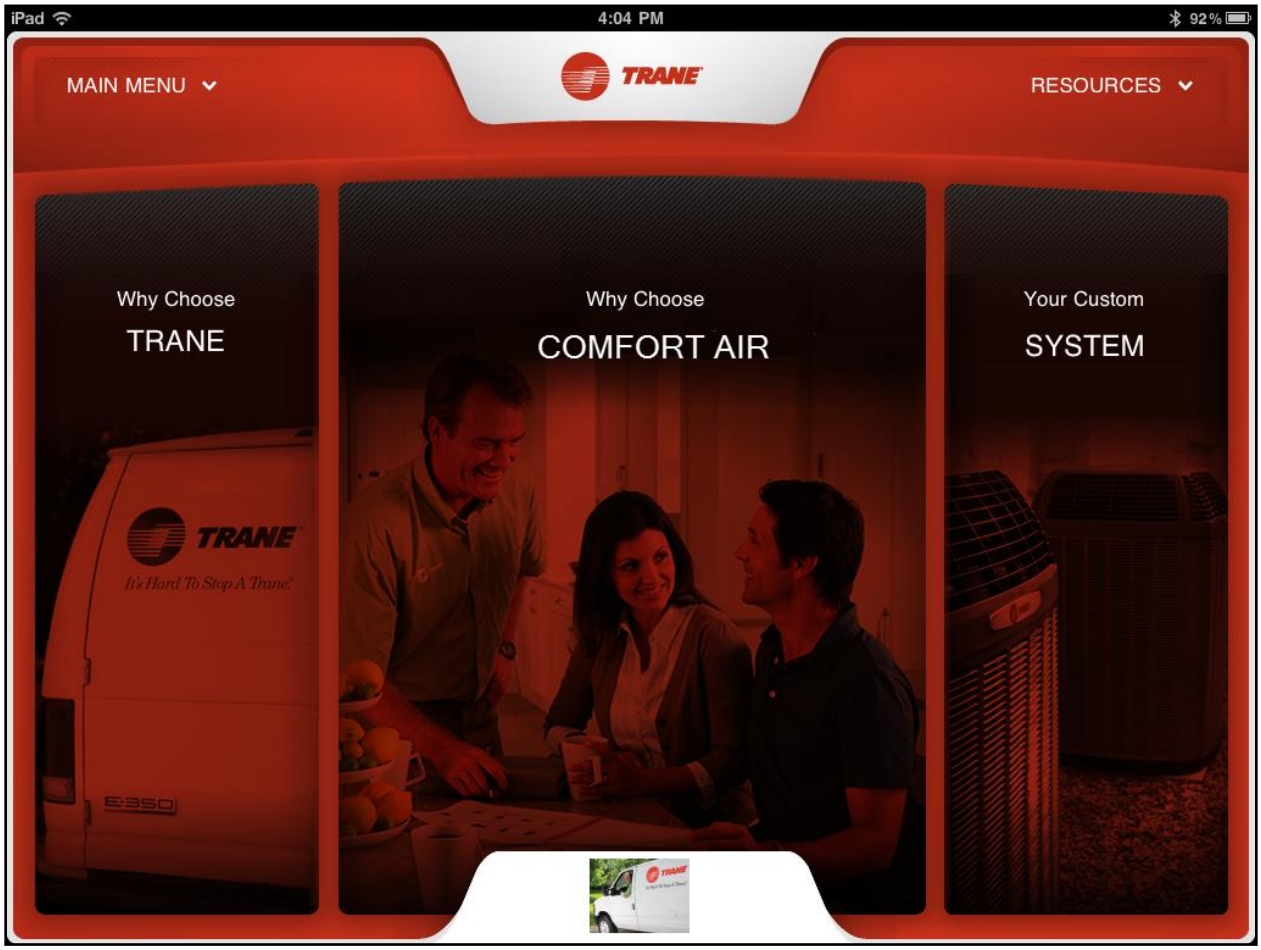
Your selections will also be influenced by your initial setup choice for either Good, Better, Best or Top Down Selling.

You can select multiple comfort enhancements. Once you select the comfort enhancement, you can choose a 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

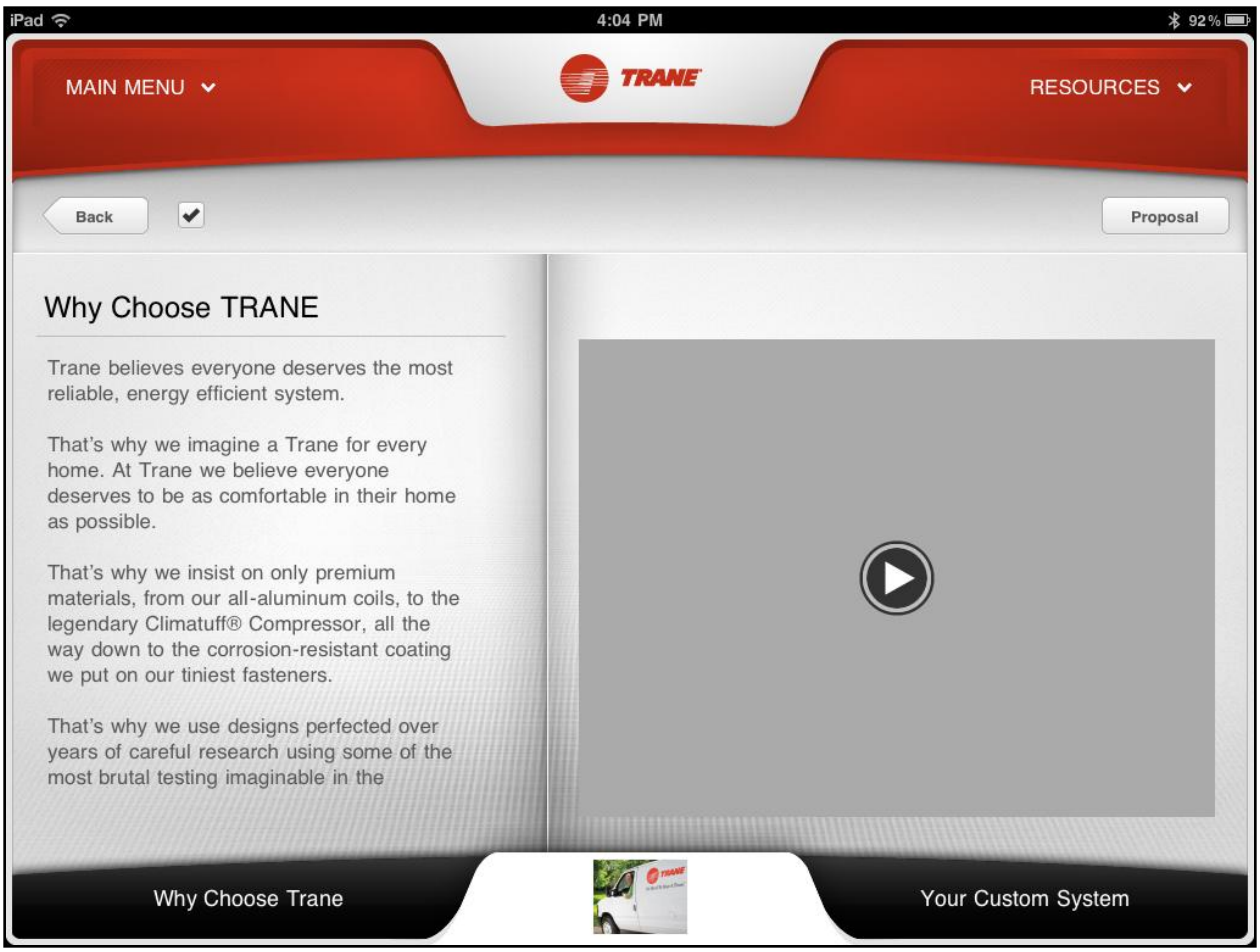


Now that you have the survey information you need and have selected equipment, it is time to sit down with the client for the presentation.

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.

Notes

Remember: Presentations are always in LANDSCAPE view.

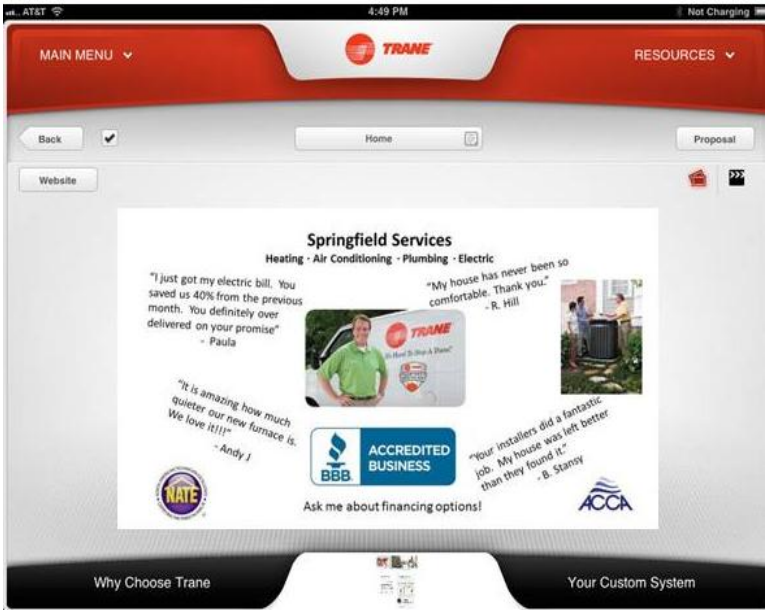


For the Why Choose Trane Section we have included a brief overview of our core values and a short video called "Why Choose Trane".

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

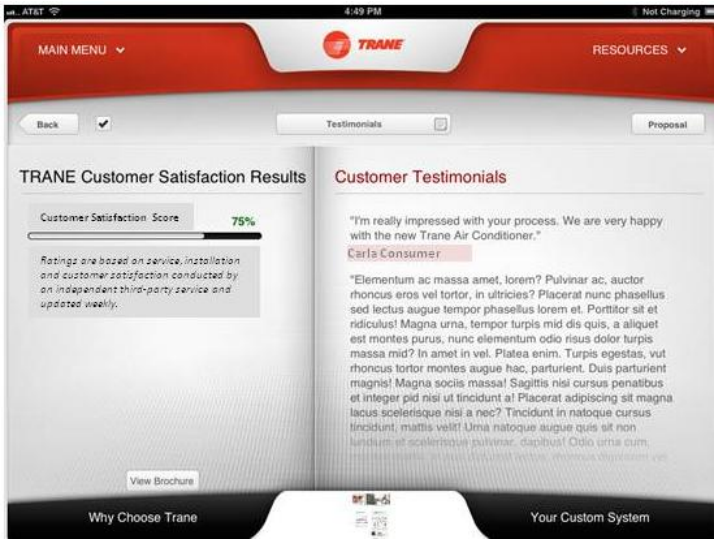


The next section of the presentation- Why Choose Dealer- tells the client about your individual company and incorporates the information you created on the Dealer Portal.

https://msit.comfortsite.com/mapsportal

Using the Dealer Portal provides these advantages:

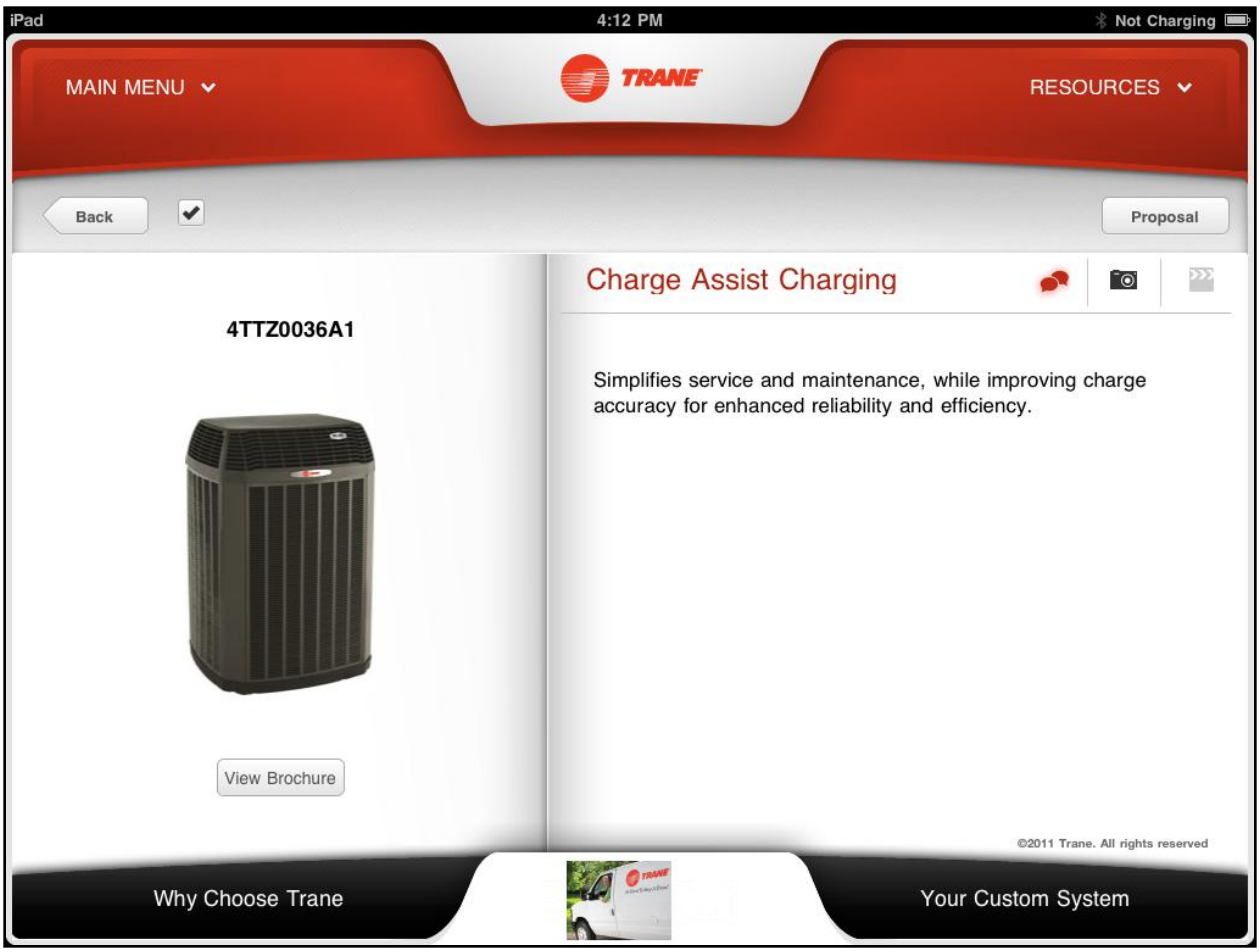
- You can centrally manage the information from the comfort of your home or office connected to the internet through your PC
- All of your iPads will be synced with the same data
- You can insert images and videos (videos are limited to 10MB each) to all of your custom pages, including the Landing Page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



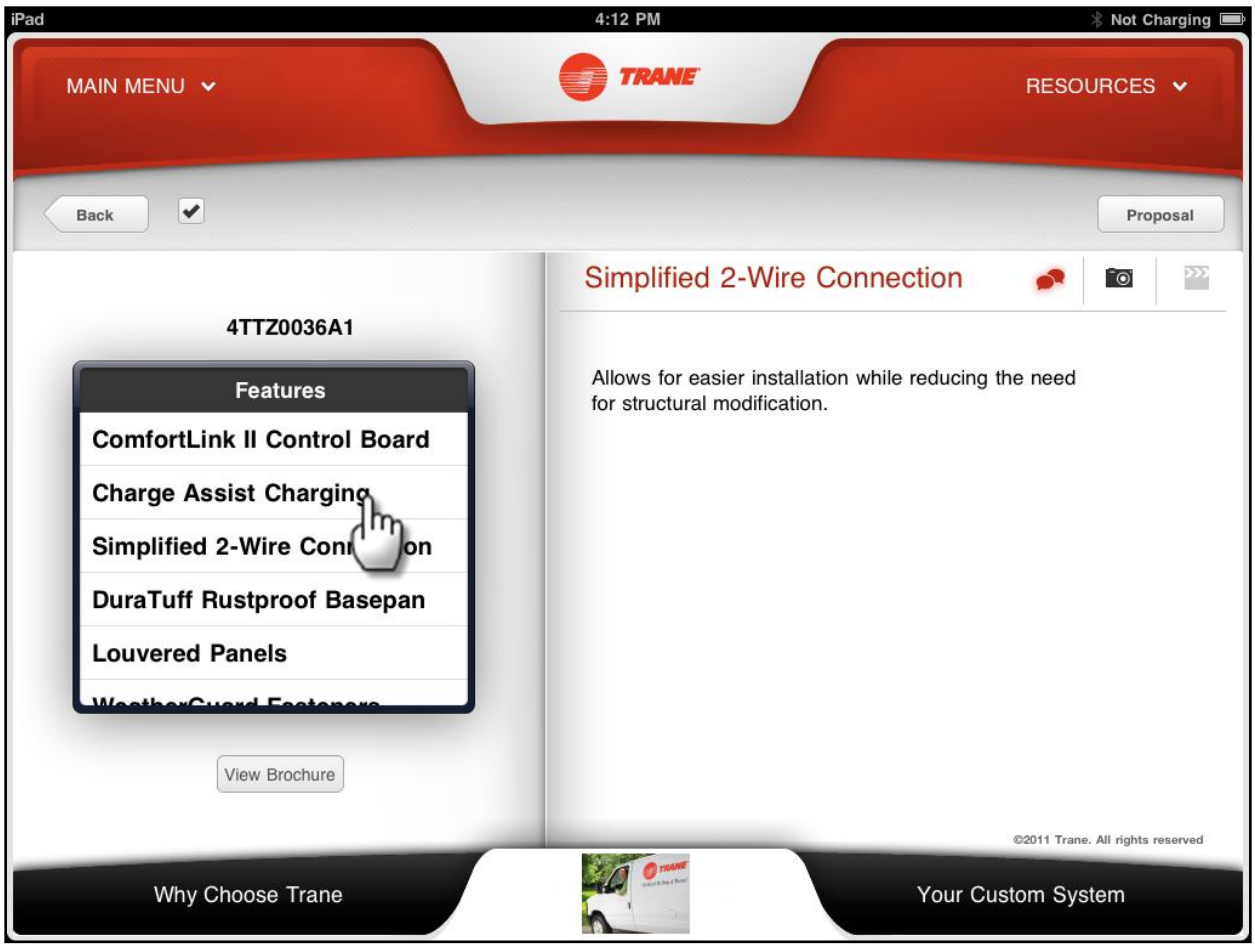
When you set up your Why Choose Dealer section on the Dealer Portal you can opt to display your Customer Satisfaction Score as part of your presentation.

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.



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.

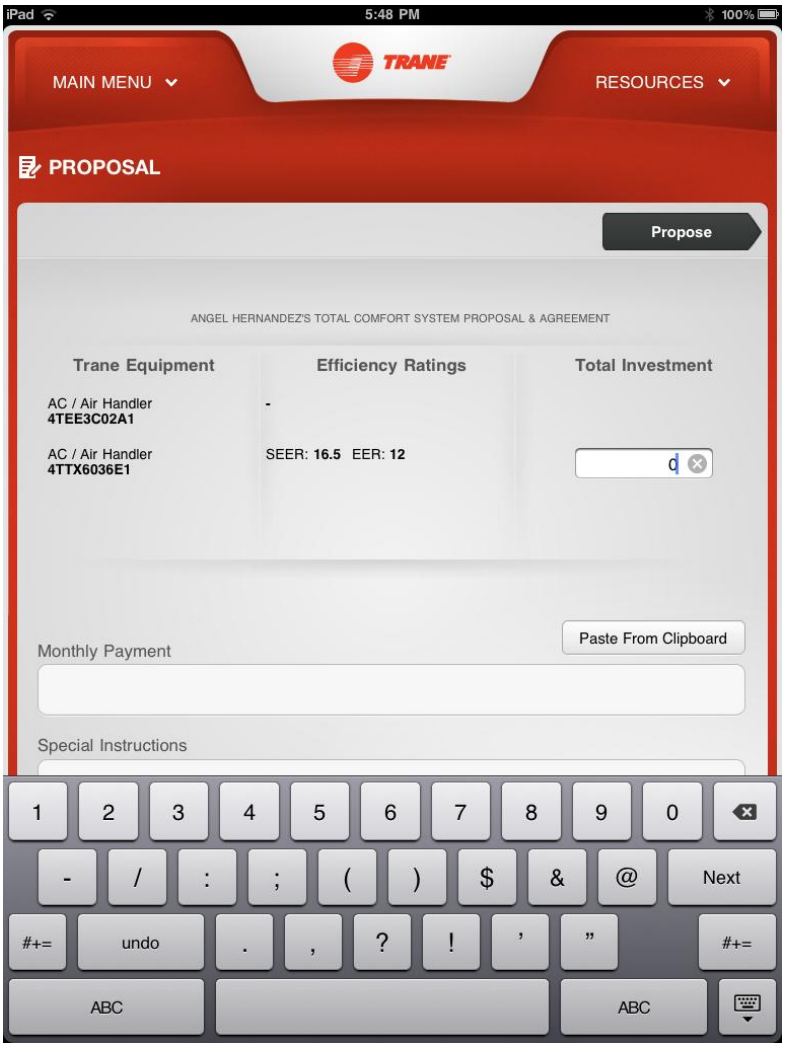
Notice the three buttons in the upper right. The talk bubbles are for talking points, the camera will display an image of the feature and the movie studio clapper will show videos. If there are no videos or images those buttons will be grayed out.

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

Proposal

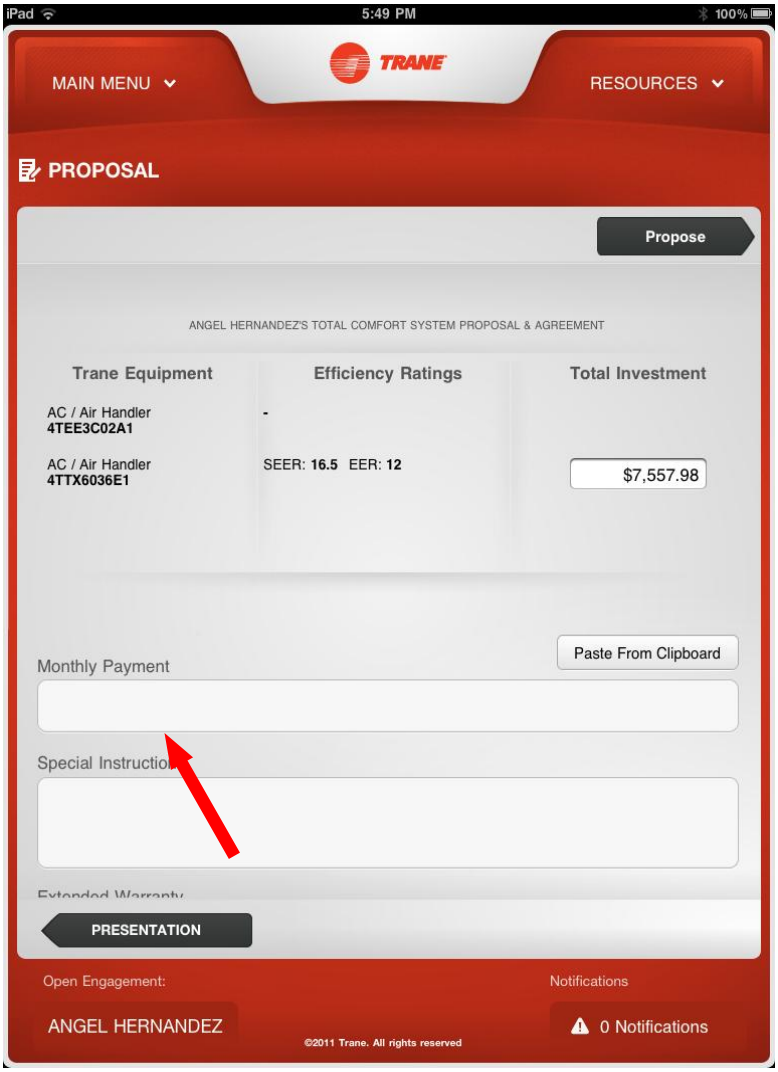
The final step is to complete the proposal and present it to the client. The equipment will be detailed on the front of the proposal.

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



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

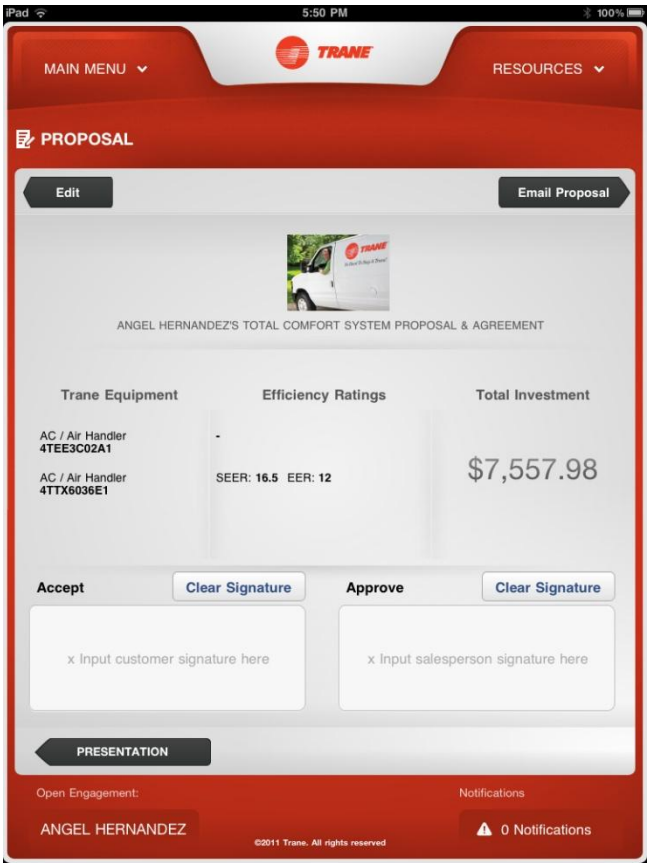
If you want to offer financing to the client, select '**Trane Financing**' from the '**RESOURCES**' drop-down menu, calculate the monthly payment in the financing calculator and hit '**SAVE**'. Go back into the proposal screen and tap "Paste from Clipboard" and the monthly payment information from the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

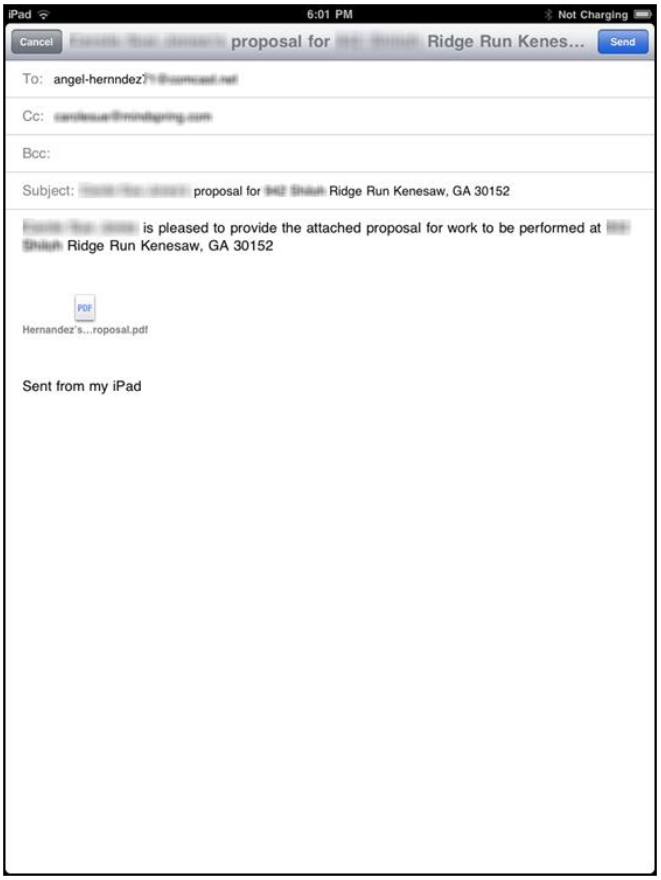


Add any additional notes or special instructions you want to include and touch the Propose button at the top of the page.

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.





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.