

*American Standard*<sup>®</sup>  
HEATING & AIR CONDITIONING



# Contractor Program Handbook



**Brinnon Williams,**  
Vice President of  
Residential Business

*Dear Valued Residential Program Contractor,*

*At Mitsubishi Electric Trane HVAC US, our goal is to continuously bring value to all of our customers. Whether it is through innovating new products, enhancing our programs, or planning events to show our appreciation, one theme remains central in the hearts of everyone at METUS: a passion for people and serving the lives of others.*

*METUS is unique in that we have several customer groups. The consumer who utilizes our product in their home or business; the distributor who supports our products and keeps us moving forward; and the contractors like you who work tirelessly to support your employees, your community, and to be a loyal steward of our brand.*

*Our contractors are a unique bunch. Like Mitsubishi Electric, you are innovators. You believe in leading the market and never hesitate to learn new concepts that help you provide solutions to grow your business and support your customers. METUS contractors are the chosen few who still believe in honor, integrity, and getting the job done right. That means so much to the people who depend on you.*

*For the ones who have been with us for the long haul, we appreciate you so much. Your leadership has helped bring us to where we are today. For the new contractors just joining the program, welcome to the family. Our goal is to show the value we bring so you can pass that on to the people important to you. Being invited into our program means you have been recognized as a game changer, an outside-the-box thinker, and someone who takes pride in their work.*

*Thank you for everything you do,*

*Brinnon Williams*

# Contents

<b>1. Contractor Program Benefits</b> .....	<b>4</b>
<b>2. Contractor Portal</b> .....	<b>6</b>
A. Login.....	6
B. HVAC Champion.....	7
C. Consumer Leads.....	8
- Dealer Locator	
- Consumer Lead Acceptance	
- Consumer Lead Engagement	
- Pausing Consumer Lead Generation	
D. Digital Marketing Assets.....	12
- TV Commercial Requests	
- Product and Lifestyle Images	
- Brand Guidelines	
- Custom Advertisements	
E. Website iFrame Content.....	13
F. Literature and Promotional Items.....	14
G. Product Technical Documentation.....	15
H. Technical Training.....	16
- Program Contractor Learning Plan	
- Tuition Waiver	
I. 12&12 Limited Warranty.....	20
- Product Registration	
<b>3. Diamond Service Group</b> .....	<b>23</b>
<b>4. Extended Labor Warranty – JB Warranties</b> .....	<b>24</b>
<b>5. Field Service Management – Dispatch</b> .....	<b>26</b>
<b>6. Consumer Financing - Synchrony</b> .....	<b>28</b>
<b>7. Diamond Retail Showroom Credit</b> .....	<b>30</b>
<b>8. Make It Right</b> .....	<b>34</b>
<b>9. METUS C.A.R.E.S.</b> .....	<b>36</b>
<b>10. Contractor Scorecard</b> .....	<b>38</b>
A. Performance.....	38
B. Lead Engagement.....	39
C. Marketing.....	39
D. Training.....	40
<b>11. Code of Conduct &amp; Rules of Engagement</b> .....	<b>44</b>

# Contractor Program Benefits

## Welcome to the Contractor Program!

Program membership offers numerous advantages to your company. Here are some common reasons why contractors like you choose to partner with METUS:

**1. Access to Exclusive Promotions and Discounts:**

The contractor program offers exclusive benefits to dealer members. These benefits give program dealers a competitive edge in the market, which can enhance the profit margins

**2. Marketing Support:** The contractor program offers marketing support, including co-op advertising funds, promotional materials, and campaign materials. This helps dealers promote the products effectively and reach a wider audience

**3. Training and Education:** The contractor program includes training benefits and educational resources. This ensures dealers are well-informed about METUS products, industry trends, and best practices, leading to better sales and customer service

**4. Technical Support:** METUS and our partnering distribution network provide technical support to contractors. This assistance can be crucial in resolving product-related issues, troubleshooting, and ensuring customer satisfaction

**5. Brand Recognition:** Being part of the contractor program can enhance the credibility and trustworthiness of a business in the eyes of consumers. The association with the METUS brand can attract more customers and build long-term relationships

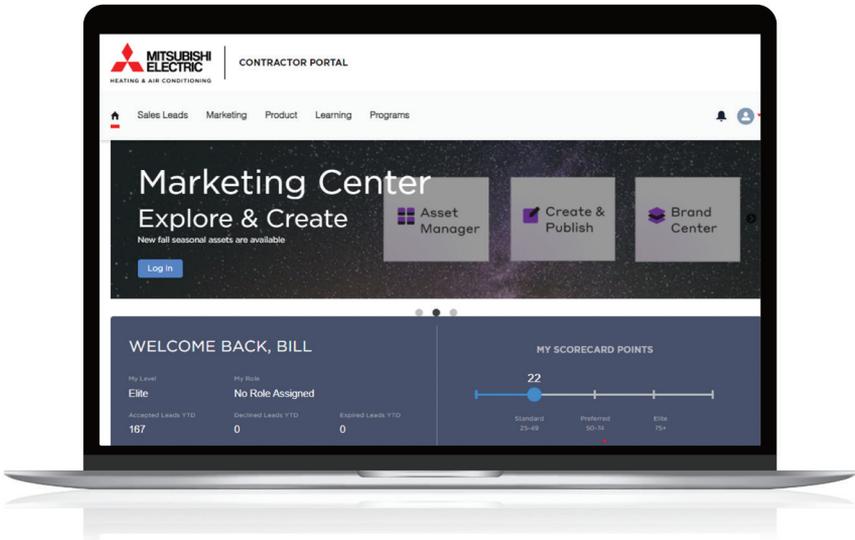
**6. Warranty and Service Support:** Trained contractors can receive additional warranty terms, ensuring that customers can rely on the dealer for assistance with product issues or repairs

# Program Benefits by Tier

Contractor Program Benefits*	Standard	Preferred	Elite
<b>Dealer Locator</b> Company listing on MitsubishiComfort.com consumer website	✓	✓	✓
<b>Consumer Leads</b> METUS generated consumer leads	✓	✓✓	✓✓✓
<b>Digital Marketing Assets</b> Access to METUS curated custom marketing templates	✓	✓	✓
<b>iFrame Website Embedded Content</b> Customizable website plugin for METUS products	✓	✓	✓
<b>Literature</b> Order point of sale and technical literature at no cost	✓	✓	✓
<b>MyLinkDrive Technical Documentation</b> Access to product technical documentation	✓	✓	✓
<b>Training Credit (16, 32, and 48 hrs.)</b> Training vouchers for METUS in-person classes	1 Seat	2 Seats	3 Seats
<b>12/12 Limited Warranty</b> Exclusive warranty terms for Program Contractors	✓	✓	✓
<b>Diamond Service Group</b> Highly trained distribution technical support staff	✓	✓	✓
<b>Extended Labor Warranty</b> JB Warranties single-zone 2-Year extended labor warranty policies	\$54	\$25	\$0
<b>Dispatch Field Service Management Tool</b> Software to help manage your leads and track business	✓	✓	✓
<b>Synchrony Consumer Financing</b> Reduced fees for program members	✓	✓	✓
<b>Synchrony Consumer Finance Buydown</b> Rebate on qualified dealer financing costs*		4%	6%
<b>Contractor Retail Showroom Credit</b> Equipment benefit toward approved retail showroom		✓	✓
<b>Make it Right Policy</b> Replace qualified equipment within the first 90-days after installation if failure occurs			1 per year
<b>METUS C.A.R.E.S. System</b> One approved system to be used for community outreach			✓
<b>Contractor Community Summit Invite</b> An annual Elite contractor conference to network, learn, and celebrate with other Elite contractors			✓

\*See program and benefits details for specific terms and conditions to qualify. Benefits subject to change without notice.

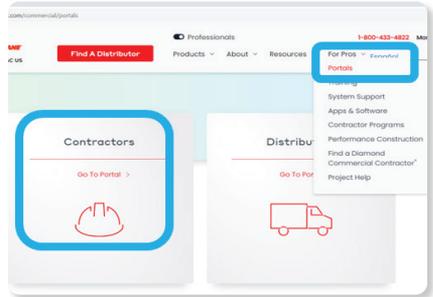
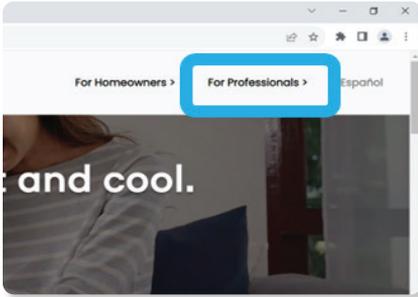
# The Contractor Portal



The Contractor Portal is your resource center for marketing and selling METUS products. In this hub you can manage your consumer leads, sign up for training classes, access marketing assets, connect with preferred partners, and more.

## Portal Login

Upon your program enrollment, your METUS Area Sales Manager will email you an invitation to the contractor portal. Click the link in the email to log in to the portal, link will expire after 24 hours. The site will prompt you to complete the Code of Conduct during setup. Next, you need to create a new password. Add the website to your favorites for future access.

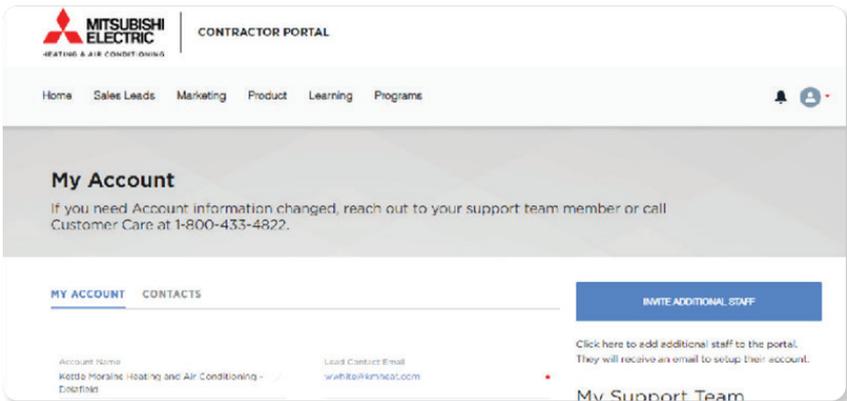


After setup, you can access the Contractor Portal through MitsubishiComfort.com. Click the For Professionals tab in the top menu, then navigate to Portals in the For Pros tab. Select the Contractor Portal icon to advance to the login screen.

## HVAC Champion

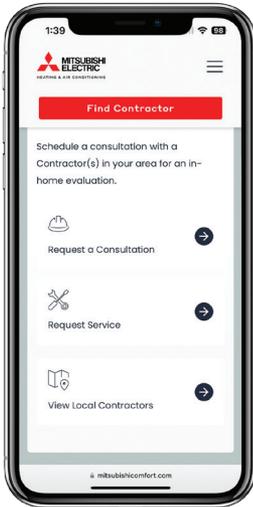
The HVAC Champion is your company's primary contact for METUS communications and resources.

Under your account drop-down, you can modify your profile and your settings. The HVAC Champion at your company can set up portal access for other employees.



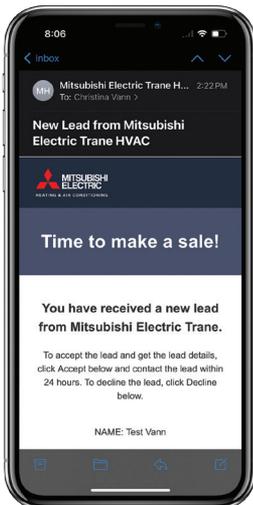
For questions and support, contact your METUS Area Sales Manager.

# Consumer Leads



## Dealer Locator

As a Program Contractor, your company information is highly visible to consumers looking for residential product experts in our Dealer Locator on the MitsubishiComfort.com website. Consumers search by zip code to find a contractor and can submit a form to be assigned to a local servicing contractor. Additionally, the phone numbers listed on the Dealer Locator are call tracking numbers that forward directly to your phone number. Call tracking allows METUS to capture the lead information and available recorded call activity, which can be used to fine-tune skills needed for answering leads.



## Consumer Lead Acceptance

Consumer leads are sent to your designated Lead Contact email address from `corporate@email-mitsubishielectrictrane.com`. Please whitelist this email domain to ensure no disruption in lead disbursement. Upon receiving a lead, you must accept or reject the lead within 24 hours during the work week. Your Lead Acceptance Rate is tracked on the Contractor Scorecard to determine program tier status. At times homeowner leads can go to multiple contractors. More than half of consumers select the first contractor who contacts them.

## My Accepted Leads

Your accepted leads are shown here. You can view information about your leads, and update the status of your leads. To make product registration simple, when a lead is marked as closed won, the product register link will appear by the lead.

Pause my leads  DisabledMore Information 

Filter by Status:

All

From

To

Search

Export Leads

NAME	SALES STATUS	DATE SENT	DETAILS	REGISTER PRODUCT
chris hayward		Aug 15, 2022	<a href="#">View More</a>	
PAUL SINGH		Aug 13, 2022	<a href="#">View More</a>	

View your accepted consumer leads on the homepage of the portal or by clicking Sales Leads tab. Leads that were declined or those that expired (not opened within 24 hours) do not show on the portal. You can create a leads report by choosing the Export Leads button.



## Lead follow-up tips:

- Follow up within 30 minutes after receiving the lead for the best chance to set an appointment
- Make sure the customer knows you're reaching out on behalf of Trane®/ Mitsubishi Electric
- Use a script to set more appointments and better qualify leads
- Send a confirmation email and a picture of your salesperson scheduled to meet with the homeowner

## Common Issues with Expired Leads:

- Not receiving our emails? Whitelist us as a contact and set our domain as a preferred sender. Ensure our lead emails reach you without issues. Optimize your opportunities
- If you have IT personnel, ask them to allow our domain through your firewalls: corporate@email-mitsubishielectrictrane.com
- The leads are going to one particular person's email, and if they leave the company or are out on vacation or sick leave, no one is getting the leads (set up a distribution email to receive the leads, i.e. "leads@abcontractor.com")
- The lead comes in twice or more, and they already accepted it once. Accept or decline every lead - homeowners are notoriously impatient and often send leads more than once

## Consumer Lead Engagement

In the Leads section of the Contractor Portal, you can maintain the sales status of each consumer. Click the Sales Status drop-down arrow and select the status from the list for each lead. If you are using the Dispatch field service management tool, when you update the lead status in Dispatch it will automatically update the lead in the contractor portal saving you this step. Your feedback helps METUS improve marketing campaigns and lead quality. Your company's lead engagement is tracked on the Contractor Scorecard.

NAME	SALES STATUS	DATE SENT	DETAILS	REGISTER PRODUCT
Matthieu MEZIL	--Select--	Feb 17, 2023	View More	
Farah Siam	Not Qualified	Feb 17, 2023	View More	
David Rempel	Proposed/Scheduled Appointment	Feb 17, 2023	View More	
Tim Hamann	Proposal provided	Feb 17, 2023	View More	
Nithin Das	Customer Purchased	Feb 17, 2023	View More	
	Closed Lost			
	Other			
	Contacted lead			
	Still working to schedule appt			
	Estimating			



## Pausing Consumer Lead Generation

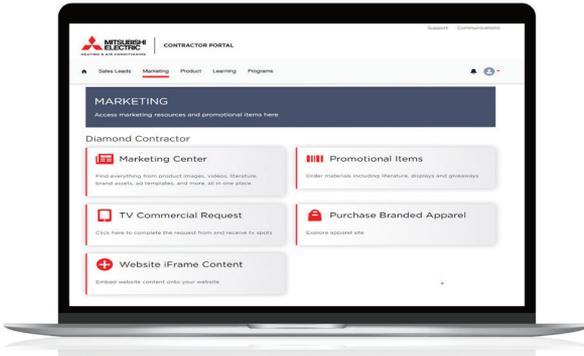
During peak times, you can choose to pause your leads for a specific amount of time, ranging from one week to 30 days.

A notification is sent when your leads are paused and when they automatically resume.

## Tips for Managing Consumer Leads:

- Keep Lead Contact information up to date. This contact will be emailed the consumer leads to accept or decline
- Leads must be accepted within 24 hours during the work week
- Preferred Zip Codes are a list of zip codes that represent your coverage area
- One Home Zip Code can be selected for priority on the dealer locator

For questions and support, contact your METUS Area Sales Manager.



Scan to watch the Marketing Center walkthrough video.

## Digital Marketing Assets

To access digital assets, click the Marketing tab located on the Contractor Portal homepage. Next, select the Marketing Center button to reach the Digital Asset Management (DAM) platform also referred to as Lytho.

Marketing Center houses everything from product images, videos, lifestyle photos, branded assets, and more, all in one place. Marketing Center consists of three sections:

### Asset Manager

In Asset Manager, you can find images, logos, ads, literature, videos, and more that you can download and use for your marketing needs.

### Brand Center

Brand Center is your source for up-to-date brand assets, including logos, colors, fonts, and usage guidelines.

### Create and Publish

In Create & Publish, you have access to a suite of digital and print materials that can be customized with your logo, contact info, and more.

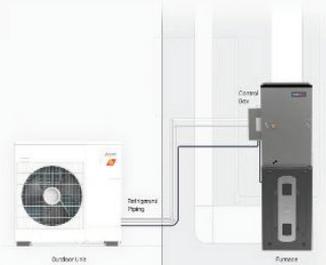
### TV Commercial Requests

Populate the TV Commercial Request Form to order one of our TV spots, which you can tag with your company logo and contact information.

For questions and support, contact your METUS Area Sales Manager.

## Complete Comfort, Eco-Efficiency

Trane + Mitsubishi Electric's Intelli-HEAT Dual Fuel System delivers cost-effective, eco-efficient, year-round heating and cooling. Variable speed technology and smart controls significantly reduce fossil fuel usage and greenhouse gas emissions. Experience complete indoor comfort and a quieter outdoor environment in ambient temperatures as low as -10° F.



## iFrame Website Embedded Content

In the Contractor Portal, you will also see a tab for Website iFrame Content. The iFrames allow you to add METUS-developed product content to your company website. As METUS creates new product information or updates existing content, your company's website updates automatically.

### How to Get Started

Adding an iFrame to your site is worth five marketing points on your program scorecard. It's easy to install. Click the QR code below or navigate through the Contractor Portal to get started today.

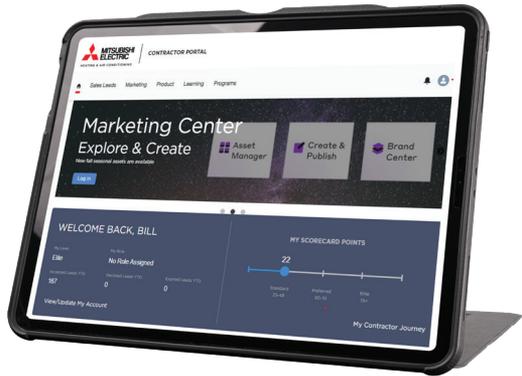
For questions and support, contact your METUS Area Sales Manager.



### How to Get Started

Adding an iFrame to your site is worth five marketing points on your program scorecard. It's easy to install. Scan the QR code or navigate through the Contractor Portal to get started today.

For questions and support,  
contact your METUS Area Sales Manager



## Literature and Promotional Items

The METUS Contractor Program continues to support no-cost consumer and technical literature for dealers.

You can access this benefit through the Contractor Portal under the Marketing tab then select Promotional Items. Here you will find a variety of consumer and technical literature available as a program benefit.

The Promotional Items site also includes branded items and displays available for a fee. Leverage these items to support your company's consumer events and home shows.

**For questions and support, contact your METUS Area Sales Manager.**

# Product Technical Documentation

## Trane.MyLinkDrive.com

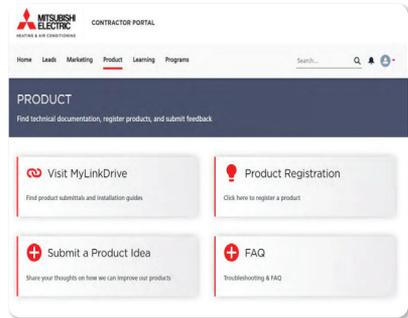
MyLinkDrive is your resource for METUS technical documentation, including installation, operation, parts, and service manuals.

When issues or errors occur, technical documentation offers guidance on troubleshooting problems. It provides:

- Step-by-step instructions
- Troubleshooting guides
- FAQs that assist users or technicians in resolving issues efficiently

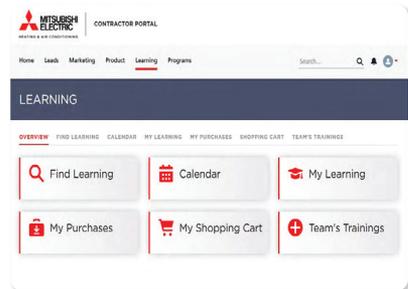
To access MyLinkDrive from your Contractor Portal homepage, click the Product tab then click the Visit MyLinkDrive button.

For questions and support, email MyLinkDrive at [CustomerCare@hvac.mea.com](mailto:CustomerCare@hvac.mea.com).



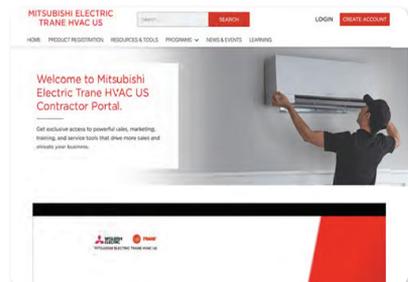
## Contractor Portal Learning

You can register for in-person classes or take e-learning courses in the METUS Learning Management System (LMS). To access the LMS, click the Learning tab in the Contractor Portal.



## Getting Started

1. Select Create Account
2. Complete the registration form and click submit.
3. An email verification is sent to complete the registration process.





# Technical Training

## Program Contractor Learning Plan

METUS recognizes contractor training is crucial for several reasons. First, it ensures that professionals in the field have the necessary knowledge and skills to perform their jobs competently. HVAC systems are complex, requiring installation, maintenance, repair, and troubleshooting expertise. Comprehensive training equips contractors with up-to-date technical know-how, enabling them to effectively handle the latest technologies, tools, and equipment.

Second, proper training ensures industry standards, codes, and regulations compliance. HVAC systems must meet specific safety and environmental standards to protect technicians and consumers. Contractors trained in these standards can ensure installations are done correctly, preventing potential hazards, and ensuring system efficiency.

Moreover, ongoing training in the HVAC field is vital due to the rapid advancements in technology and evolving industry practices. Continuing education lets contractors stay abreast of new developments, energy-efficient solutions, and best practices. This knowledge helps improve service quality, increases customer satisfaction, and enables contractors to offer innovative solutions tailored to the specific needs of their clients.

## Required Training Plan

Standard	Preferred	Elite
16 Hours	32 Hours	48 Hours
M- and P-Series Essentials	M- and P-Series Essentials	M- and P-Series Essentials
Residential Product Overview	Residential Product Overview	Residential Product Overview
Residential Applications	Residential Applications	Residential Applications
	Diamond System Builder - Design to As-Built	Diamond System Builder - Design to As-Built
		Residential and Light Commercial Preventative Maintenance

## Distributor Training Locations

Many distributors in the METUS network host local training classes. Distributor instructors are factory-trained by METUS to conduct the same technical courses at their training facilities to serve you better on the local level. Contact your distributor salesperson for more information on what is available in your area.

## METUS Contractor Program Benefit

Program Contractors receive tuition waivers based on tier status. These waivers provide training hours for qualified classes at no charge in METUS training facilities. Based on space and class availability, the following courses are eligible to apply program waivers:

- M- and P-Series Service Essentials
- Advanced M- and P-Series Service Course
- Advanced Residential Controls
- SMART MULTI® Essentials
- Intelli-HEAT Essentials

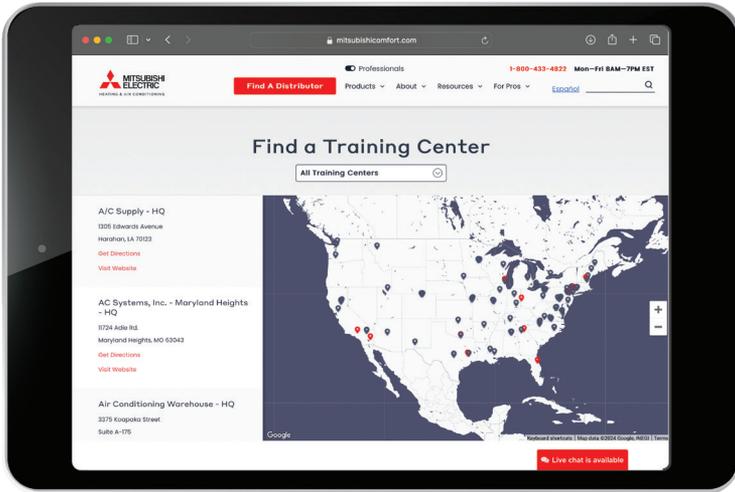
Standard	Preferred	Elite
1 Seat	2 Seats	3 Seats

## Contractor Eligibility

- The Program Contractor signed the current calendar year Code of Conduct to receive a new tuition waiver and must have taken the M- and P- Series Installation & Service Essentials within the last three calendar years
- Every subsequent year, the Program Contractor must utilize the tuition waiver by registering for the classes above before the end of the calendar year. The tuition waiver does not roll over to the following program year
- The tuition waiver is only valid at a Mitsubishi Official Training Center (MOTC) and does not apply to private courses held by distributors
- If the Program Contractor's employee signs up for a course utilizing the tuition waiver and fails to adhere to the cancellation policy, the tuition waiver is void for that program year
- All prerequisites must be met before a contractor can register for a course using the tuition waiver

## Enroll Utilizing a Tuition Waiver

- Program Contractor emails METUS Training Department at [training@hvac.me.com](mailto:training@hvac.me.com), calls 678-730-1710, or contacts the Business Unit Administrator at the preferred MOTC. A complete list of MOTC locations and contact information can be found at [www.MitsubishiComfort.com](http://www.MitsubishiComfort.com)
- The Program Contractor must provide the course date, course location, name of the student, and contact information. METUS sends course confirmation to the student's email



## METUS Training Locations (MOTC)

METUS has numerous manufacturer-led training centers and over 60 Authorized Training Centers (ATCs) nationwide to serve you. Using our Learning Management System (LMS), you can easily search for, purchase, and manage your training courses.

- Houston, TX
- Los Angeles, CA
- Orlando, FL
- Atlanta, GA
- Chicago, IL
- Hebron, KY
- Boston, MA
- Manhattan, NY
- Dallas, TX
- Florence, NJ



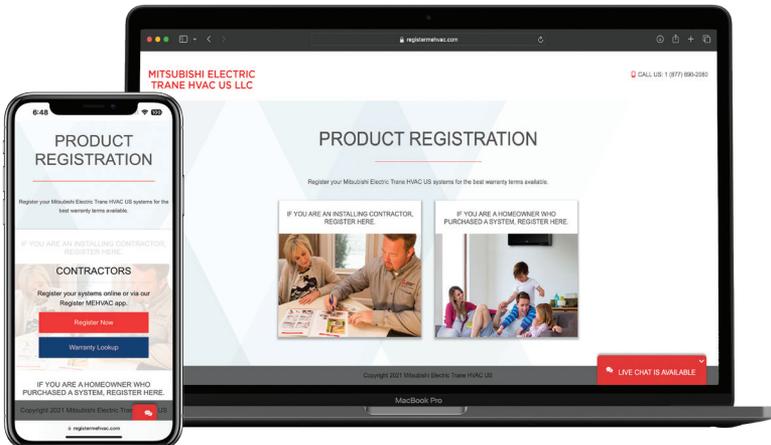


# 12/12 Limited Warranty

12-year parts and 12-year compressor warranty is offered exclusively to Program Contractors who register M- and P-Series products within 90 days of installation. Warranty applies to residential single-family homes and will be given to the original owner if the original owner still resides in the home.

## Product Registration

- To access the product registration website visit [www.registermehvac.com](http://www.registermehvac.com)
- You can access the registration site through the Contractor Portal by choosing the Product tab on the home page and then selecting Product Registration
- To check your warranty registration numbers, please go to Warranty Lookup
- Enter your warranty registration (WR) number into the lookup field, and you will receive a link to a warranty PDF to download or print



## Registration Tips

- You must register the system within 90 days of installation to be eligible for an extended limited warranty
- You must register all indoor and outdoor units for the system to be complete
- Branch boxes and controllers do not require registration
- Use the service reference number on the data plate in the model number during registration. This alleviates some model and serial number matching issues
- Register the system to the purchaser/owner of the system. The warranty is not transferable
- Enter the site address of where the system was physically installed
- Please input the email address where you would like the warranty certificate sent. The certificate will also be sent to the person registering the system
- If the homeowner also registers the system and the install date you submitted does not match, it will cause an issue creating the warranty certificate
- Use Google Chrome for the best site experience

If you need to send in a picture of the data plate/tear tags for review, please send it to [productregistration@hvac.mea.com](mailto:productregistration@hvac.mea.com).



## Product Registration FAQs

**Q: I can't find my company's name on the product registration website. What should I do?**

A: Click the Request Research button to have your company's name added to the list to enable your enrollment. You may also call Participant Services at 877-690-2080.

**Q: I did not upload documentation before submitting my registration or uploaded the wrong documentation. Can I upload it after my registration?**

A: Go into the History tab and choose the registration from the Claims Needing Verification queue. You can upload your documentation in the pop-up tab, and the registration will be reviewed. You can also email [productregistration@hvac.me.com](mailto:productregistration@hvac.me.com) for assistance. Please remember to include your Coversheet ID number in your email. Attached copies of the tear tags or photos of the data plate are needed to update the registration. The request cannot be processed using the distributor invoice.

**Q: I forgot my password or have an issue logging into my account. What should I do?**

A: Call Participant Services at 877-690-2080.

**Q: I have my warranty number, but my certificate does not appear in the lookup search. What is wrong?**

A: The system takes about 15 minutes to load the warranty registration fully, so please allow some time before you put your warranty number in the lookup to obtain the warranty certificate.

**Q: There is a mistake on my warranty certificate. How can I correct it?**

A: Please email [productregistration@hvac.me.com](mailto:productregistration@hvac.me.com) with the warranty registration (WR) number and the required changes.

**Q: I am an Elite or Preferred Program Contractor, and I forgot to enter the ten-digit Synchrony customer account number on the registration form. What should I do?**

A: Email [SynchronyRebate@hvac.me.com](mailto:SynchronyRebate@hvac.me.com) with the ten-digit account number, your warranty registration (WR) number, and a copy of the final customer invoice to have this corrected.

# Diamond Service Group (DSG)

The Diamond Service Group (DSG) includes distributor-employed individuals highly trained to deliver superior technical support to Contractors within local markets. Many DSG members conduct authorized training classes that mirror training performed by METUS instructors and yield the same CEU credits.



## Benefits to Residential Program Contractors:

- DSG members receive advanced training
- Less time waiting on hold for technical support
- DSG members know local market needs and applications
- DSG members have priority access to METUS field service and technical support personnel
- Local technical relationships are fostered
- Easy transition from diagnosis to service parts ordering



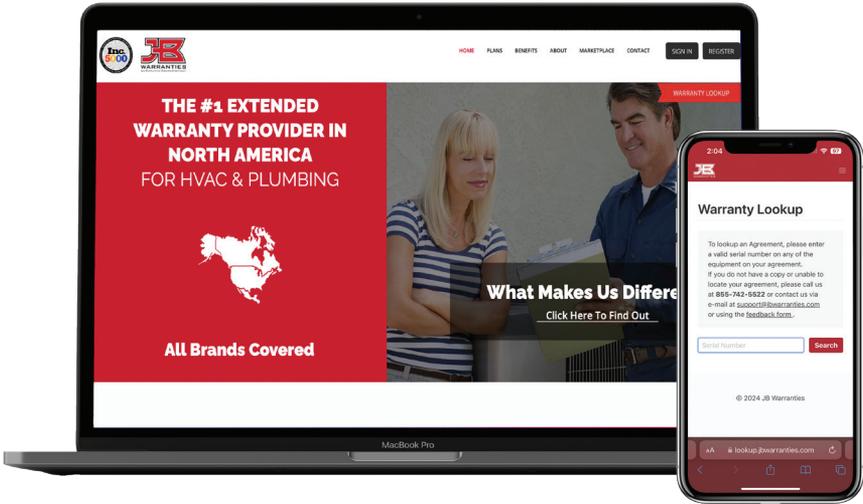
# Extended Labor Warranty

JB Warranties offers the premium extended warranty program available in the HVAC/R and Plumbing industries. For the length of the extended service contract, the extended warranty policy protects your customers against unexpected repair costs. JB Warranties extended warranty plans cover parts and labor repair costs when a mechanical breakdown occurs.

## Extended Warranty Benefits:

- Online warranty management portal
- Competitive pricing and claims payout
- Can be purchased up to two years after the installation date
- Up to \$300/hour labor rates and up to 12-year coverage
- Guaranteed warranties underwritten with "A" rated underwriter
- Build long-term customer relationships
- Owners can transfer policy at no cost
- Multiple repairs without penalty
- Claims reimbursement in 30 days or less





## METUS Contractor Program Benefit:

This year the METUS Contractor Program offers a promotional rate on two-year extended warranty policies at \$90/hour labor rate for METUS single-zone systems. You can upgrade the policy term or labor rate by paying the difference. Multi-zone systems are not part of the promotion. See price sheets for details. Special offer only good during 2024 program (subject to change without notice).

Contractor Tier	Standard	Preferred	Elite
Non-program Price	\$109	\$109	\$109
Program Price	\$54	\$25	\$0



### How to Get Started

1. Go to [meus.jbwarranties.com](https://meus.jbwarranties.com)
2. Click the "Getting Started" button
3. Experience the benefits

For questions or current pricing email [sales@jbwarranties.com](mailto:sales@jbwarranties.com) or call 877-243-8168.

# Field Service Management

Create and manage work in the office and on the road. See everything happening by following daily updates in real-time without calling. Easily organize work in one place: fast scheduling, technician routing, and job site organization with the web-based dashboard. Empower staff to quickly access job information and appointment status using the mobile app.



## Field Service Management Benefits:

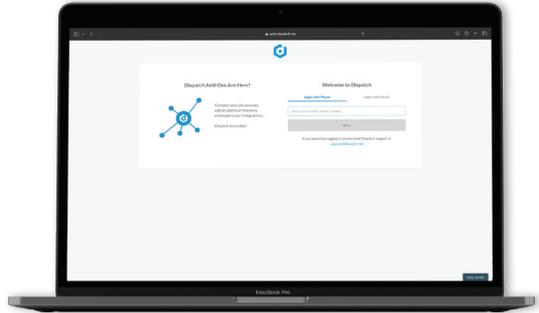
- Automated status updates mean less time on the phone
- Schedule and manage all your work in one place
- Track and locate field team members
- Reduce time and paperwork using paperless billing
- Consumer history is available to field staff through the mobile app
- Build your brand through consumer surveys



# Integrate METUS Consumer Leads with Your Company's FSM

Dispatch can integrate the following platforms:

- ePASS Enterprise
- FieldEdge
- Housecall Pro
- Rossware
- Service Fusion
- ServiceTitan®
- WALKabout



## FSM Consumer Lead Integration benefits:

- Save time and reduce errors by automatically transferring METUS consumer lead information into your system
- Save time by automatically sharing lead engagement status with METUS and earning your program tier status

## METUS Contractor Program Benefit:

As a METUS Program Contractor, you receive this benefit at no cost. You can enjoy the efficiency of using Dispatch for your company's FSM or integrate METUS consumer leads with your existing platform at no cost.

Contractor Tier	Standard	Preferred	Elite
Non-program Price	\$1200	\$1200	\$1200
Program Price	\$0	\$0	\$0



## How to Get Started

Visit [signup.dispatch.me](https://signup.dispatch.me) to learn more about downloading our mobile applications.

For questions and support, contact your METUS Area Sales Manager

# Consumer Financing

Providing consumer financing options enables customers to afford higher-priced items without immediate full payment. This flexibility in payment terms makes products and services more accessible, attracting a larger pool of potential buyers who might otherwise be unable to make a one-time purchase. Financing options can also enhance customer loyalty and satisfaction, fostering long-term relationships and repeat business. Additionally, it allows your company to stand out in a competitive market, giving you an edge by catering to consumers' diverse financial needs and preferences. Ultimately, consumer financing is a win-win scenario, empowering customers with purchasing power while driving your company's sales and revenue.

METUS partnered with Synchrony to provide your company with consumer financing options. Synchrony knows financing. They've been providing financing solutions to businesses for over 85 years. Synchrony gives you clear and straightforward financing options so that you can focus on your customers and close more sales.



## Exclusive Program Contractor Benefits:

- Dedicated credit limit for future home improvement projects
- \$0 fraud liability
- Easy application process with fast credit decisions
- Deferred interest promotional financing or low monthly fixed payments
- Options available for less-than-perfect credit scores
- Elite and Preferred tier contractors may have special buydown offers through Synchrony

## METUS Contractor Program Benefit:

As a METUS Program Contractor, Synchrony offers reduced program fees to all tiers. In addition, Preferred and Elite tier contractors are eligible for special promotions.

## 2024 Spring Financing Exclusive Promotion:

Financed sales containing ONLY METUS branded equipment, including Trane®/Mitsubishi Electric, American Standard®/Mitsubishi Electric, or Mitsubishi Electric, are eligible for contractor fee rebates at the rates indicated below during the promotional period.

Contractor Tier	Standard	Preferred	Elite
Buy-down Rebate*	---	4%	6%

\*Buydowns available on sales funded January 1 – April 30, 2024. Rebate must be claimed within 30 days of installation.



## How to Get Started

Enroll at [www.syfenroll.com](http://www.syfenroll.com) or call 888-574-2804 and select option 3.

For questions and support, contact your METUS Area Sales Manager

# Retail Showroom Credit

## Focus:

Preferred or Elite level Program Contractor who have the required space to dedicate to a fully functional retail showroom.

## Contractor Eligibility:

- The contractor must be an Elite or Preferred level Program Contractor in good standing with their nominating distributor
- The contractor must have the dedicated space and staff required to manage a retail showroom
- The contractor must be preapproved by the METUS sales team for participation



## Timeframe:

Calendar Year 2024\*

## Benefits:

- Contractor can utilize up to \$12,000\* in showroom credit to install a variety of M-, Nv-, and P-Series products and controls in a space or mobile showroom suitable for customers to visit.
- The showroom program will provide the opportunity to upgrade their showroom every 5 years.

\*Subject to program budget limitations and can be terminated at any time.

## **Program Guidelines:**

- System must be installed in a showroom or reception area of a contractor brick and mortar location or mobile showroom
- This program does not include installation materials such as line sets, disconnects, whips, pads, or other accessories
- The program does not cover labor
- The program only covers METUS preapproved equipment. It does not cover construction or renovation expenses
- Showroom credit can only be utilized once by a Program Contractor per five-year period per location
- If a Program Contractor has multiple locations, the contractor can only utilize the showroom credit once per year
- Equipment must be installed and operational by December 31st, 2024
- The equipment cannot be utilized in a space that contains competitive equipment or competitive equipment logos, trademarks, or literature
- The contractor must have a suitable space that is preapproved by the METUS Business Unit sales team, including photos of the space and a showroom equipment layout. The Showroom Credit agreement form must be completed and submitted
- The contractor must allow METUS access to the showroom with a 48-hour notice under reasonable circumstances
- Eligible products: Only M-, Nv-, and P-Series equipment and residential controls qualify for use in this program
- The contractor must install the showroom equipment within 60 days of receipt. The showroom must be complete within 90 days of equipment receipt
- Approval of completed showroom will include documentation of serial numbers of installed equipment and photos upon final inspection by the METUS sales team

**For questions and support, contact your METUS Area Sales Manager.**

# Why You Should Install a Working Showroom



## Product Demonstration

A showroom provides a physical space where contractors can showcase products and systems. It allows potential customers to see and experience the equipment firsthand, demonstrating its features and functionality.



## Customer Education

A working showroom serves as an educational tool. Contractors can use it to educate customers about technologies, energy-efficient options, and the latest innovations. This helps customers make informed decisions about their HVAC needs.



## Building Trust

A well-designed and functional showroom can contribute to building trust with customers. Seeing actual systems in operation can instill confidence in the contractor's expertise and the quality of the products they offer.



## Hands-On Experience

Customers can have a hands-on experience with the systems, understanding how they work and how they might fit into their homes. This hands-on experience can be more convincing than merely describing the features of a system.



## Upselling Opportunities

Showrooms allow contractors to upsell or cross-sell additional products and services. For example, customers may be more inclined to invest in higher-end models or additional features after seeing them in action.



### **Competitive Edge**

A working showroom can give HVAC contractors a competitive edge in the market. It sets them apart from competitors who may not have a showroom. Customers may be more drawn to contractors who offer a tangible and interactive experience.



### **Training and Development**

A showroom can serve as a training and development space. It allows contractors to train their staff on the latest technologies, installation techniques, and maintenance procedures in a real-world setting.



### **Events and Open Houses**

Contractors can host events and open houses in their showrooms to attract potential customers, industry professionals, and partners. These events create networking opportunities and help raise awareness about the contractor's offerings.



### **Visual Marketing Material**

Showrooms provide contractors with visual content for their marketing materials. High-quality photos and videos taken in the showroom can be used in promotional materials, websites, and social media to showcase their capabilities.



### **Customer Confidence**

Seeing a working showroom can instill confidence in customers that the contractor is established and committed to providing quality products and services. It creates a professional image and reinforces the contractor's credibility.

# Make it Right

The Make It Right contractor benefit allows Elite tier contractors to replace a single unit with no questions asked. METUS realizes there are times we need to do what is best for the customer. The Make It Right benefit addresses these situations.

## **Program Contractor Eligibility:**

- Program Contractor with Elite level status
- Program Contractor cannot be in provisional status
- Program Contractor must be in good standing with their distributor
- Program Contractor can only utilize the program through their program-affiliated distributor

## **Timeframe:**

The qualifying contractor must submit the claim within 90 days of the initial start-up date. The qualifying contractor can only redeem one piece of equipment during the calendar year.

## **How to Claim:**

1. The contractor must provide all pertinent information in the “Make It Right” claim form and submit it as instructed. Contact your Area Sales Manager for support.
2. The contractor must certify that the original unit was condemned and scrapped.
3. Equipment will ship directly from METUS to the indicated location.

For questions or support, reach out to your METUS Area Sales Manager.



# METUS C.A.R.E.S.

The METUS C.A.R.E.S (Community Awareness Reward Enablement System) program is designed to support contractor's community outreach efforts in their local market. HVAC contractors may choose to donate HVAC systems to charitable causes for various reasons:



#### **Community Support:**

The HVAC Program Contractor may feel a sense of responsibility to give back to their communities. Donating free systems to charities can be a way to support those in need and contribute to the community's well-being.



#### **Building Relationships:**

Donating HVAC systems to charities can help contractors build relationships with local organizations, community leaders, and residents. It creates goodwill and may lead to future business opportunities or collaborations.



#### **Publicity and Marketing:**

Charitable donations can be a part of a contractor's marketing strategy. Publicizing such acts of generosity can enhance the company's reputation, attract positive media coverage, and generate new business through increased visibility.



#### **Employee Morale and Engagement:**

Involving employees in charitable activities, such as donating and installing HVAC systems for free, can boost employee morale and engagement. It fosters a sense of pride and purpose among staff members.

## **Timeframe:**

The METUS C.A.R.E.S. program can be used once per calendar year by a qualifying contractor if approved by a participating distributor and METUS.

## Contractor Eligibility:

- The contractor must be an Elite level Program Contractor
- METUS C.A.R.E.S. can be utilized once per calendar year by a qualifying contractor
- The contractor cannot be in provisional status
- The contractor must be in good standing with their participating Distributor
- The benefit can only be utilized through the contractor's primary Distributor
- The METUS C.A.R.E.S. form must be signed and returned to ContractorDev@hvac.me.com, authorizing METUS to use project and event details, photography, and other assets for marketing and PR purposes

## Program Guidelines:

- The contractor must provide a copy of marketing materials (ads, banners, postcards, door hangers, etc.) used to promote the event as proof of concept
- The participating Distributor must approve the proof of concept
- The equipment cannot be given to family members, employees, distributor employees, or friends
- No Charitable Donations shall be made at the request of any government official; to any government entity or official; to any charity associated with a government official or family member of a government official who has oversight or responsibility for any aspect of government related to METUS's business activities; or to any political or religious organization
- The equipment can be used for silent auctions as a complete system installation. Labor and installation materials will be covered by the contractor
- The contractor will secure their system from their primary Distributor
- The contractor must submit the coop preapproval request 30 days before the event
- The Distributor must utilize METUS coop to fund the program
- The coop claim split is 50% Distributor and 50% METUS
- The maximum system cost for a wall-mounted single-zone system is \$3000, with METUS paying up to \$1500
- The maximum system cost for a ducted single-zone system is \$4000, with METUS paying up to \$2000
- The maximum system cost for a multi-zone system is \$5000, with METUS paying up to \$2500
- This program does not include installation materials such as line sets, disconnects, whips, pads, or other accessories
- The program does not cover labor
- METUS is not responsible for any shipping and handling costs incurred by distribution

**For questions and support, contact your METUS Area Sales Manager.**

# The Contractor Scorecard

Like many rewards programs, the Contractor Scorecard tracks your company's activity to determine program tier status. Status is calculated based on four performance areas: Purchase Performance, Lead Management, Training, and Marketing. Scorecard points are earned based on participating in qualified activities. Your company's status is earned this year carries into the next calendar year.

A Program Contractor can level up during the year to earn even more benefits. At the beginning of each calendar year, the Scorecard resets to begin earning your status for the next year.

## Performance

Purchases are determined based solely on your company's purchases from your nominating distributor. Bonus points can be earned by contractors purchasing large volumes of METUS products.

Training points are earned based on your company employee's participation in qualifying courses. Training is offered through in-person courses at MOTC and MATC locations. Program Contractor development sessions include in-person or webinar sessions with your METUS Area Sales Manager covering product and application information, systems and portal administration, marketing meeting, etc.

Performance (40)					
Volume in Dollars	\$25,000-\$50,000	\$50,000-\$100,000	\$100,000-\$150,000	\$150,000-\$200,000	
	10	20	30	40	
Bonus Volume in Dollars	\$25,000-\$50,000	\$50,000-\$100,000	\$100,000-\$150,000	\$150,000-\$200,000	
	5	10			
Training (20)					
Contractor Development with Area Manager	One Session	Two Sessions	Three Sessions	Four Sessions	Five Sessions
	2	4	6	8	10
Training Courses (In-person and online)	One Course	Two Courses	Three Courses	Four Courses	Five Courses
	2	4	6	8	10
Lead Interaction (20)					
Lead Acceptance Rate	<80%	80-90%	>90%		
	0	5	10		
Lead Engagement Rate	<50%	50-75%	>75%		
	0	5	10		
Marketing (20)					
Participation in Regional & National Program	One Program	Two Programs	Three Programs	Four Programs	
	2	5	10	15	
METUS on Website		5			

## Lead Management:

Consumer Lead Management is important in earning higher tier status in the Contractor Program. Two areas of lead management are tracked: Lead Acceptance Rate and Lead Engagement Rate.

- Lead Acceptance Rate =  $\frac{\text{Accepted Leads}}{\text{Total Leads (Accepted + Expired)}}$
- Lead Engagement Rate = % Accepted Leads with Updated Sales Status (see page 10 for details)

## Marketing Programs:

Marketing engagement is key in gaining top tier program status. Hosting METUS product information on your company website earns five points. Up to four additional marketing programs earns even more points.

The following activities qualify as marketing program engagement:

- Dispatch Field Service Management (page 26)
- JB Warranties Extended Labor Warranty (page 24)
- METUS Regional Marketing program participation
- Synchrony Consumer Financing (page 28)

# Applicable Trainings for Scorecard Points

Course Name	Points
Advanced CITY MULTI® Service	2
Advanced M- and P-Series Service	2
Advanced Residential Controls	2
CITY MULTI Essentials	2
CITY MULTI Essentials (Spanish)	2
M- and P-Series Essentials	4
M- and P-Series Essentials (Spanish)	4
M- and P-Series Field Service Seminar	2
Residential Applications	2
Residential Product Overview	2
Residential Zoned Comfort Solutions - Module 1	1
Residential Zoned Comfort Solutions - Module 2	1
Residential Zoned Comfort Solutions - Module 3	1
Residential Zoned Comfort Solutions - Module 4	1
Residential Zoned Comfort Solutions - Module 5	1
Residential Zoned Comfort Solutions - Module 6	1
SMART MULTI® Essentials	2
115V Wall-mounted Unit	0.28
18 SEER Wall-mounted Unit	0.28
4- and 5-ton Air Handler	0.28
Ceiling-suspended Unit	0.28
Cooling Only Large Capacity Wall-mounted Unit	0.28
Cooling Only Wall-mounted Unit	0.28
Deluxe Wall-mounted Unit	0.28
Designer Wall-mounted Unit	0.28
EZ FIT® Recessed Ceiling Cassette Unit	0.28
Floor-mounted Unit	0.28

Course Name	Points
Four-way Ceiling Cassette Unit	0.28
Four-way Ceiling Cassette Unit-PLA	0.28
Intelli-HEAT™ Cased Coil Unit	0.28
Large Capacity Single-zone Air Conditioner, MUY-GS	0.28
Large Capacity Wall-mounted unit	0.28
Low Static intelli-AIR™ Unit	0.28
Mid Static intelli-AIR™ Unit	0.28
Multi-position Air Handler Unit-PVA	0.28
Multi-position Air Handler Unit-SVZ	0.28
Multi-zone Heat Pump, MXZ-C (NAHZ)	0.28
Premier Wall-mounted Unit	0.28
P-Series Cooling Only Unit - PUY	0.28
P-Series H2i Hyper Heat Unit - PUZ-HA	0.28
P-Series Heat Pump Unit - PUZ	0.28
P-Series Wall-mounted Unit	0.28
Single-zone Air Conditioner, MUY-GL	0.28
Single-zone Heat Pump, MUZ-(GL, HM, JP, WR)	0.28
Single-zone Heat Pump, MUZ-GS (NAHZ)	0.28
Single-zone Hyper-Heating Heat Pump MUFZ-KJ (NAHZ)	0.28
Single-zone Hyper-Heating Heat Pump, MUZ-FS	0.28
SMART MULTI™ Unit	0.28
Standard Wall-mounted Unit	0.28
Technology and Competitive Advantages	0.28
Universal Outdoor Heat Pump Unit - SUZ	0.28
Universal Outdoor Heat Pump: Hyper-Heating Unit - SUZ	0.28
Zoning	0.28
Residential & Light Commercial Controls	0.20

# Contractor Scorecard

Performance (40)			
Volume in Dollars	\$25,000-\$50,000	\$50,000-\$100,000	
	10	20	
Bonus Volume in Dollars	\$200,000-\$500,000	\$500,000-\$1,000,000	
	5	10	
Training (20)			
Contractor Development with Area Manager	One Session	Two Sessions	
	2	4	
Training Courses (In-person and online)	One Course	Two Courses	
	2	4	
Lead Interaction (20)			
Lead Acceptance Rate	<80%	80-90%	
	0	5	
Lead Engagement Rate	<50%	50-75%	
	0	5	
Marketing (20)			
Participation in Regional & National Program	One Program	Two Programs	
	2	5	
METUS on Website	5		

Contractor Tier	Point Total
Standard	25-49
Preferred	50-74
Elite	75+

	\$100,000-\$150,000	\$150,000-\$200,000	
	30	40	
	Three Sessions	Four Sessions	Five Sessions
	6	8	10
	Three Courses	Four Courses	Five Courses
	6	8	10
	>90%		
	10		
	>75%		
	10		
	Three Programs	Four Programs	
	10	15	

# Code of Conduct & Rules of Engagement

## Program Contractor Code of Conduct

As a Program Contractor participating in the Diamond Contractor® or Ductless Pro program (the “Program”), I hereby agree to uphold the highest level of professionalism and to adhere to the following standards and procedures to maintain the integrity, high-quality brand image and reputation of any products sold through Mitsubishi Electric Trane HVAC US LLC (METUS):

### Professionalism

- Program Contractors, including their employees, agents and contractors, shall maintain the highest standards of professionalism, ethics, and integrity with customers, contractors, employees, suppliers, and the general public.
- Program Contractors shall continually strive to uphold the highest level of technical knowledge, including about METUS products, through continued training and interaction with professionals in the HVAC field.
- Program Contractors shall comply with all applicable laws, regulations, licensing requirements, codes and ordinances, including those pertaining to HVAC business practices and the selling, servicing and installation of METUS products.
- Program Contractors shall and observe fair dealing, positively contribute to maintaining METUS’ reputation, and refrain from any unlawful, unfair, misleading, or deceptive practices including but not limited to: false advertising, aggressive sales tactics, or misrepresentation, exaggeration, or misstatement of Product features, consumer benefits, or operational characteristics.
- Program Contractors shall respect the investment made in METUS-generated new customer leads and existing customer maintenance leads by diligently following up on each lead (but in no event later than 24 hours within the workweek after receipt) with the intent to sell or service METUS products, and to use the customer personal information that METUS transmits

solely for the purpose of selling or servicing METUS products, as applicable, and shall abide by all applicable privacy policies, agreements, and applicable laws. Under no circumstances, shall Contractor use leads for any purpose besides the specific request made by the customer. Contractors who do not maintain an 80% or higher acceptance rate could be removed from the lead distribution portion of the program, as well as from METUS' online dealer locator provided to customers. METUS reserves the right to transfer leads from Program Contractor to another contractor, and to remove Program Contractor from the METUS-generated customer lead program for any reason, at any time, without notice.

- Program Contractors shall maintain sufficient entity and other licensure and registration, including contractor licenses and others as may be required by regulating agencies (e.g., state contractor licensing boards, city licenses to conduct business, entity formation with Secretary of State) and any other licenses or registration for Participating Contractor to conduct its business in good standing with federal and state regulatory agencies. Program Contractors will promptly notify METUS if such Program Contractor becomes subject to any enforcement or administrative action, or such license or registration becomes suspended or terminated.
- Program Contractors must manage and oversee their employees and agents to ensure that those employees and agents comply with the requirements identified in this Code of Conduct.

## **Branding**

- Program Contractors shall not use the words "Mitsubishi", "Mitsubishi Electric", "METUS", "Three Diamonds", or any Mitsubishi Electric brand name or similar words within a root URL, email address, or any other identifier associated with Program Contractor.
- Program Contractors shall not use the METUS or its affiliates brand name, logo, trademark, trade dress, or any other intellectual property without adhering to METUS' guidelines for such usage.
- Program Contractors shall not use the METUS or its affiliates brand name, logo, trademark, trade dress, or any other intellectual property of METUS without (i) the prior written consent of METUS, (ii) strict adherence to the advertising toolkit provided by METUS to Program Contractors or (iii) strict adherence to the marketing agency advertisements approved by METUS.

## **Customer Service**

Program Contractors shall treat their customers with integrity, competence and objectivity. Program Contractors shall respond to customer requests in a timely manner but in no event later than two (2) business days, and be committed to resolving customer complaints and/or concerns. Program Contractors shall work together with the customer promptly to address any problems and, when necessary, appropriate and possible, shall collaborate to create and implement corrective actions and solutions.

## **Field Service**

- Program Contractors shall continuously improve through training and must always have at least one METUS-trained person on-site or available for every project at all times.
- Program Contractors must meet or exceed training requirements and annual training hours as outlined in the Contractor Program Handbook. Training required for entry into the Program expires three years from the date of entry and must be renewed before or during the fourth year of participation in the program. Program Contractors found to violate the training requirements are subject to removal from the Program.
- Program Contractors shall conduct field service work in a timely, systematic, and well-documented manner, always striving to meet or exceed the customer's expectations.
- Program Contractors shall document service work accurately and professionally in compliance with all METUS product manuals, guides and specifications to maintain a comprehensive system service history record.
- Program Contractors shall agree to any requirements or standards METUS may require to maintain the integrity of any products and brands sold through METUS.
- Program Contractors shall make no statements or promises concerning products sold through METUS unless authorized or supported by documentation from METUS or the original manufacturer.
- Program Contractors shall meet certain thresholds as set by METUS, but METUS has not conveyed any certification of the Program Contractors. Program Contractors shall hold themselves out as independent contractors, and not agents or employees of METUS, with no authority to bind METUS. Program Contractors shall not represent as having, and shall

not permit their officers, employees or agents to represent as having, any association, partnership, franchise, joint venture, or principal/agent with METUS or its affiliates.

- Program Contractors must register M-, Nv- and P-Series products with METUS within 90 days of installation.
- Program Contractors shall report or make information available to METUS, as METUS requests from time-to-time in its sole discretion, including without limitation, purchase and inventory data.
- Program Contractor has the right to purchase product from any METUS distributor. Program Contractor acknowledges that (i) Program Contractor status is tracked solely based on purchases made from its designated Primary Distributor, (ii) to change its Primary Distributor, Program Contractor must follow the process outlined in the Rules of Engagement Policy (iii) Program Contractor must adhere to all other terms of the Rules of Engagement Policy.

## **Terms and Conditions**

- Program Contractors shall maintain a policy of commercial general liability insurance, including products – completed operations coverage, with an insurance carrier authorized to do business in the United States and having a rating of “A”, “A-” or better by A.M. Best Company and a Financial Size Category rating of at least Class VIII, with policy limits of no less than \$1,000,000 per occurrence and \$2,000,000 aggregate. Notwithstanding the forgoing, Program Contractors shall maintain any additional insurance requirement or any higher coverage as may be required by law or regulation in the jurisdictions in which such Program Contractor conducts business. Such policies shall name METUS as an additional insured. All certificates will provide for at least thirty (30) days written notice to METUS prior to any reduction or cancellation of any insurance. A certificate of insurance meeting these above requirements shall be delivered to METUS upon its request.
- To the fullest extent permitted by law Program Contractors shall indemnify and hold harmless METUS from all liabilities, damages, costs and expenses including but not limited to attorneys’ fees, arising from or connected to (i) any breach of such Program Contractor’s obligations under either this Code of Conduct or any training provided by METUS to such Program Contractor, or (ii) the negligence, gross negligence or willful

misconduct of such Program Contractor or anyone directly or indirectly employed by or affiliated with Program Contractor for whose acts the Program Contractor may be liable.

- Program Contractors shall permit METUS to audit Program Contractors' compliance with the obligations of this Code of Conduct and cooperate with METUS in its audit of such Program Contractor. Upon finding of any breach of this Code of Conduct by Participating Contractor, METUS may require, in its sole discretion, Participating Contractor's compliance with a remediation plan to facilitate Program Contractor's future compliance with this Code of Conduct.

### **Consents to Disclosure**

- Program Contractors hereby consent to disclosure of their name, city, state zip code(s) and map location in which they conduct business, business address and tracking phone number by METUS to a third-party contractor for the purpose of: (1) facilitating republication of Program Contractors' aggregate star ratings posted on Google to METUS' website under its "Dealer Locator" page, and consent to such republication by METUS onto the METUS website, and linking from the METUS website to such Program Contractor's user ratings on the Google website, and (2) for METUS's internal analytics, program management or Program improvement.
- Program Contractors hereby consent to disclosure of its business name, business address, business phone number and Program tier designation to METUS contractors for purposes of METUS' Program analytics, Program management or Program improvement.

## **METUS Home Energy Rebates Marketing Program**

In certain states, METUS may offer to provide marketing and lead generation to certain Program Contractors in connection with Home Efficiency Rebates and/or Home Electrification and Appliance Rebates (the “Home Energy Rebates”) offered pursuant to the Inflation Reduction Act, which provides point-of-sale consumer rebates to enable low- and moderate-income U.S. households to electrify their homes (“METUS’ Home Energy Rebates Marketing Program”). For Program Contractors participating in METUS’ Home Energy Rebates Marketing Program, such Program Contractors agree as follows:

- Program Contractor shall apply, meet all applicable criteria and be accepted as a qualified installing contractor under the applicable State program implementing Home Energy Rebates (“Home Energy Rebates Contractor Qualification”).
- Upon request, Program Contractor will promptly submit to METUS evidence of its Home Energy Rebates Contractor Qualification.
- Should Program Contractor’s Home Energy Rebates Contractor Qualification be terminated or suspended, leave the program implementing the Home Energy Rebates or be investigated for lack of compliance (each, a “Termination Event”), Program Contractor shall immediately (but no later than two business days) notify METUS of such Termination Event.
- Immediately upon a Termination Event, Program Contractor shall cease representing itself as having Home Energy Rebates Contractor Qualification and shall cease any further use of any METUS’ Home Energy Rebates Marketing Program materials.

## Certification

Program Contractor acknowledges and agrees to the Anticorruption Certificate attached to this Code of Conduct as Addendum A hereof, and Program Contractor shall execute and deliver to METUS such other anticorruption certificates as requested by METUS from time to time to confirm Participating Contractor's compliance with antibribery laws. METUS reserves the right to discontinue or modify this Program at any time without notice, including without limitation, modification of any advantages or benefits, or immediate removal of a Program Contractor's status for any violations of these requirements, or for any reason in METUS' sole discretion upon a 30-day termination notice.

I also hereby confirm that I have received and read the METUS Privacy Policy found at [www.metahvac.com](http://www.metahvac.com).

Print Name: \_\_\_\_\_ Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Company Name: \_\_\_\_\_

# **Addendum A to Program Contractor Code of Conduct**

## **Anti-Corruption Certification**

For purposes of this Certification, the term “Government Official” means any officer or employee of a federal, state, provincial or local government or any department, agency or instrumentality thereof, or any corporation or other entity controlled thereby, including any employee of state-owned business or enterprise, or any person acting in an official capacity for or on behalf of any such government, department, agency, instrumentality, corporation or other entity, or candidate for political office, or any officer, employee or agent thereof.

By signing and delivering this Certification to METUS, the Participating Contractor hereby represents and provides assurances to METUS that during the twelve (12) month period preceding execution of this Certification:

1. No officer, director or employee of the Participating Contractor has been (i) investigated, interviewed, deposed, or subpoenaed in connection with, (ii) been declared to be guilty of, (iii) paid/ ordered to pay any fine, civil penalty, or settlement amount for, (iv) been subject to debarment or suspension because of, or (v) involved in any legal proceedings relating to the violation of any laws, rules, or regulations relating to bribery, corruption, money-laundering, fraud, or related offenses or of any laws, rules, or regulations governing donations, contributions, honoraria, or any other form of remuneration to any Government Official or political party.
2. Made any payment or promise to pay, or authorized any payment of money, gifts or any other items of value to any Government Official for the purpose of influencing the Government Official in order to obtain or retain business, or to direct business to any person.
3. Made any payment or promise to pay, or authorized any payment of money, gifts or other items of value, to any person, including third parties, while knowing that all or some portion of the thing of value will be offered, given, or promised to a Government Official.
4. Intentionally or knowingly concealed or disguised the true nature of any transaction involving METUS in the Participating Contractor’s books and records.

## **Anti-Corruption Certification (Cont.)**

The individual executing the Code of Conduct to which this Certification is attached (the "Signatory") hereby certify that: (i) the Signatory is authorized to execute this document on behalf of the Participating Contractor; (ii) the Signatory has read and fully understand the contents of this document; (iii) the information provided above is, to the best of such Signatory's knowledge and belief, accurate, current and complete; and (iv) the Signatory agrees to notify METUS promptly of any material changes to the information provided herein.

# Mitsubishi Electric Trane HVAC US LLC

## Residential Rules of Engagement

### Background/Policy Statement

The Company has developed these Residential Rules of Engagement (“Rules”), which apply whenever a Residential Ductless product distributor and HVAC contractor are entering into a new business relationship or affiliation, or ending an existing relationship or affiliation. The Rules apply to all distributors and contractors dealing in Company’s Residential Ductless products, regardless of the brand or channel.

Through these Rules, Company is able to manage its Residential distribution channels more efficiently and effectively while minimizing the potential for channel conflict or customer confusion. The Rules also improve the Company’s ability to monitor sales, technical support, and training programs that distributors offer to HVAC contractors, thereby ensuring a consistently superior customer experience across all channels.

### Guidelines & Requirements

Company recognizes that Residential HVAC distributors and contractors often develop deep and long-lasting business relationships. To ensure that such relationships are mutually beneficial to both parties while still protecting the Company’s reputation for high-quality products and services, distributors are encouraged to provide contractors with strong sales and technical training programs, post-sale support, and so forth.

At the same time, Company recognizes that some distributor-contractor affiliations may come to an end and some contractors may wish to affiliate with a new distributor for its product training and support needs. These Rules set forth the appropriate process and guidelines when such a transition occurs.

1. Each Ductless contractor designates its “Primary Distributor” (i.e., the distributor from which the contractor primarily purchases products and receives training and other support), which Company maintains in its records for sales and training support reasons.

## Guidelines & Requirements (Cont.)

2. When a contractor wishes to change its Primary Distributor, the contractor must send a written communication to the Company's local Regional Manager stating its desire to change and including the name of both the Primary Distributor and the newly-selected distributor (the "New Primary Distributor").
3. Upon receipt, the Company will notify both the Primary Distributor and the New Primary Distributor of the requested change in writing along with a copy of the contractor communication. This notification by Company will start a 2-week Waiting Period as described below.
4. For 2 weeks after Company's written notification, the current Primary Distributor will continue to provide support to the contractor without interruption or change.
5. During the Waiting Period, the potential New Primary Distributor will not provide any product pricing to the contractor or otherwise attempt to solicit the contractor for projects or other matters.
6. During the Waiting Period, the Company's Area Sales Manager will not contact the contractor on behalf of the New Primary Distributor or otherwise attempt to affect the contractor's decision.
7. During the Waiting Period, the Company's Regional Manager will explain to the contractor the impact of the requested change, if any, on their contractor programs and benefits.
8. At any time during the Waiting Period, the contractor may inform Company via a written communication that it no longer wishes to change its Primary Distributor. Upon receiving such notice, the Company's Regional Manager will inform all parties and the request for change will be withdrawn.
9. Upon expiration of the Waiting Period, Company's Regional Manager will contact the contractor to confirm the decision regarding Primary Distributor status.
10. Upon such confirmation, Regional Manager will communicate to all parties the contractor's final decision and, if confirmed, the change in Primary Distributor status will be reflected in Company's system and other records.

## **Compliance; Enforcement**

In addition to the foregoing Rules, distributors and contractors are expected to comply with all laws governing their individual business dealings and relationships including antitrust and trade practice laws, as well as any existing contract requirements (either under a contract with Company—in the case of Residential distributors—or with each other).

Failure to comply with the Rules or other legal or contractual requirements may result in serious consequences as determined by Company in its sole discretion, up to and including possible termination of your business relationship with Company.

Company assumes sole responsibility for implementing and enforcing the Rules and does not seek from any third parties any information about any other parties' compliance or non-compliance. Company employees will not discuss actual or alleged violations by one distributor or contractor with another distributor or contractor.

Company reserves the right in its sole discretion to modify the Rules in any way Company sees fit, including discontinuing the Rules entirely. In the event that any part of these Rules is found to be in violation of local, state or federal law, the remaining parts shall continue in effect.

## **Contact Information**

All questions regarding the Rules must be directed in writing to Company's Vice President of Sales, who will respond in writing. Company sales representatives and other employees are not authorized to modify the Rules, negotiate their application or interpretation to individual situations, or waive any non-compliance, and any such statement or representation is unauthorized and invalid. Ingersoll-Rand/Trane is not responsible for applying, interpreting, or enforcing these Rules, and any such statement or representation is unauthorized and invalid.

We look forward to your continued support and promotional efforts on behalf of Mitsubishi Electric Trane HVAC US LLC.



[mitsubishicomfort.com](http://mitsubishicomfort.com)

## MITSUBISHI ELECTRIC TRANE HVAC US

© 2024 Mitsubishi Electric Trane HVAC US LLC. All rights reserved.

Mitsubishi Electric, Lossnay, and the three-diamond logo are trademarks of Mitsubishi Electric Corporation. CITY MULTI, kumo cloud, kumo station and H2i are registered trademarks of Mitsubishi Electric US, Inc. Trane and American Standard are registered trademarks of Trane Technologies plc. All other product names mentioned herein are trademarks or registered trademarks of their respective owners.

ENERGY STAR and the ENERGY STAR mark are registered trademarks owned by the United States Environmental Protection Agency. Use of the AHRI Certified<sup>®</sup> mark indicates a manufacturer's participation in the certification program. For verification of certification for individual products, go to [www.ahridirectory.org](http://www.ahridirectory.org).

Specifications shown in this brochure are subject to change without notice. See complete warranty for terms, conditions and limitations. A copy is available from Mitsubishi Electric Trane HVAC US LLC.