

The Trane® Technician App Overview and how to get tech access:



What is the Trane Technician app?

The Trane Technician app is a tool that empowers technicians to streamline installation, commissioning, servicing and troubleshooting of HVAC equipment – all from a mobile device.



How to get the Trane Technician app: The Trane Technician app is available for free download on the App Store and or Google Play Store. Search for “Trane Technician” or scan the QR code above:

How do I get login access for my techs in the Trane Technician app?

- Go to www.partners.trane.com > Login
- **CLICK > Portal Admin** at the top middle of the page.
- **CLICK > Users** (please note: Only owner / admin access can add new users)
- **CLICK > Add new user** : Enter e-mail address. Each user must have an individual e-mail address. This will check the system and see if the e-mail has been used. If it is already in system, it will autofill next page.
- **Complete form:** Full user persona see definition below: *We are only going to focus on techs for this example.*
- **Persona for techs will be:** Technician/Installer
- **Ecomm Access for Tranesupply site:** Product information Only
- **Brand Channel account type:** Trane-DSO-dealer
- **Account Contact Relationships access:** Diagnostics -Technician – TrainingSupport-WarrantyInfoOnly
- **Hit Save:** Once the new user is setup is saved. They will receive an email with account access setup information.

Example of this on the next page.

What features are available on the Trane Technician app?

1. Step-by-step guides for installation and commissioning of systems
2. Monitor HVAC equipment and diagnose system issues
3. Equipment barcode scanning for product details and technical literature
4. Warranty status lookup
5. Access calculators for refrigerant pressure/temperature calculations, sensible capacity calculations and more
6. Remote connect to a homeowner’s Trane thermostat
7. Smart wiring diagrams and dip switch settings using
8. Guided Installation

Edit User Details

Title
Tech

Personas

Available	Selected
Sales	Technician/Installer
Marketing	
Owner/Leadership	
Office Admin/Finance	
Procurement/Warehouse Ma...	

Ecomm Access
Product Information Only

Cancel Save

1. Determine the level of access for the e-commerce site

- **Full Access:** Allows the user to manage products and orders.
- **Pricing and Availability:** Allows the user to see pricing, availability, and product information.
- **Availability Only:** Allows the user to see availability and product information.
- **Product Info Only:** Restricts the user to viewing product information only.

2. Choose Brand Channel Account Type

The Brand Channel Account Type is automatically selected for you based on the account, so this should be auto-populated and correctly filled out already. Only change this using the dropdown if you absolutely need to. This field ensures the user has access to the appropriate brand channels within the portal.

3. Set ComfortSite Securities

Choose the appropriate security level based on the user's role and the sensitivity of the information they'll be handling.

4. Save the New User

Double-check all the information to ensure it is correct. Then, click the 'Save' button to create the new user.

5. Confirmation

The new user will receive an email with their login details and instructions on how to access the Partner Portal.

Edit Account Contact Relationship

Account Name
[Redacted]

Brand Channel AccountType
Trane-DSO-Dealer

CS/ASDN Security Groups

Available	Chosen
Diagnostics.Dealer	Diagnostics.Technician
EquipmentMaxCoop	TrainingSupport
FinancePayOnline	WarrantyInfoOnly
MAXPlus.DSOCoop	

Here are the Full User personas:

Owner/Leadership:

Represents individuals who own the HVAC business. They should have full access to all partner portal capabilities, allowing them to oversee and manage every aspect of the business.

This includes:

- visibility to the information about their dealership
- the ability to add, remove and update users
- visibility to all cases created by the users aligned to their dealership
- visibility to orders and access to invoice information

Office Admin/Finance:

Responsible for a variety of administrative tasks, including ordering parts and equipment, managing accounts receivable and payable, and processing warranties. Their role ensures the smooth operation of the business's financial and administrative functions.

- visibility to the information about their dealership
- the ability to add users
- visibility to all cases created by the users aligned to their dealership
- visibility to orders and access to invoice information

Procurement/Warehouse Manager:

Manages incoming inventory in the dealer's warehouse and coordinates the staging of upcoming installations. They are responsible for ordering and tracking parts and equipment, ensuring that everything is in place for efficient operations.

- Can update Contact Point Address
- Read Only access to Invoices
- Cannot view or update company users

Sales:

This group includes RSPs (Retail Sales Professionals) and others who support the sale of residential and light commercial equipment. They perform tasks like ordering and tracking parts and equipment. They also provide product information and find marketing materials to support sales efforts.

- Visibility to only the cases they create.

Marketing:

Supports marketing activities for the dealership. They are responsible for finding and ordering marketing materials and submitting co-op claims. Their role is essential for promoting the business and driving customer engagement.

- Does not have Access to Warranty
- Read only access to Invoice Information

Technician/Installer:

Leads service technicians and provides product and technical

information. They handle ordering and tracking parts, as well as looking up serial numbers. Their role is crucial for maintaining the technical aspects of the business.

- Read only access to view Orders
- Cannot access invoices and user management

Company

Administration menu in Admin Center so they can view company information, order notifications, and users.

-Partner Portal relationship to ComfortSite (account contact relationship)

- **Diagnostics.Dealer** Provides administrative access to the Diagnostics application
- **Diagnostics.Technician** Provides access to the Diagnostics application
- **EquipmentMaxAdmin** Provides administrative access to the legacy MAX system.
- **EquipmentMaxCoop** Provides access to Coop in the legacy MAX system.
- **FinancePayOnline** Allows user access to Account Track Online and to the Pay Invoices function.
- **MAXPlus.DSOCoop** Provides access to Coop in the MAX Plus system.
- **Parts** Allows access to Order Center / Parts & Supplies
- **ProductInfoMatrixOnly** For customers that are not dealers (e.g., Architects) to get the Prod Info.
- **TrainingSupport** Allows user access to the Product Information, Tech Support, and Training Center menus.
- **UserAdmin** : Allows a user to view the Company Administration menu in Admin Center so they can view company information, order notifications, and users.
- **Warranty** Allows user access to the Warranty Center menu and all functions within it.
- **WarrantyInfoOnly** Used for accounts that are "Warranty Only", limits access.

Partner Portal Support

Digital Tools Support team: Call 1-800-430-5284, Mon. - Fri., 7:30 a.m.–4:30 p.m. CST, or email ptservice@tranetechnologies.com

