

2017 Bryant Bonus & Wild Card Promotion Dealer & Distributor Handbook



Heating & Cooling Systems

Bryant Bonus & Wild Card Dates

Sales Period: April 1st – June 30th, 2017
Installation Period: April 1st – July 15th, 2017
Claiming Period: April 1st – July 31st, 2017 by 6pm CST
Dealer Enrollment: April 1st – June 30th, 2017

Promotion terms subject to (1) product availability and (2) change or cancellation without notice

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DISTRIBUTORS: LOOK FOR TEXT HIGHLIGHTED IN YELLOW WHERE YOU CAN CUSTOMIZE THIS HANDBOOK FOR YOUR CUSTOMERS. DELETE THIS TEXT BOX WHEN FINISHED.



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IMPORTANT INFORMATION – Spring 2017

Revisions and updates to the Spring 2017 Bryant Bonus Promotion are noted below, in addition to key reminders.

1. Bryant Bonus 3-ply rebate claim forms are *required* for each product rebate claim for the Spring promotion. Claim forms are not required for financing or Wild Card reimbursements. **If a dealer is not utilizing claim forms, and a fully-filled out claim form complete with dealer and homeowner signatures cannot be provided to the factory or the distributor upon request, the claim is not eligible for factory reimbursement and will become the responsibility of the distributor and the dealer.**
2. Homeowners will have the option to use **either** a qualifying Bryant branded control/thermostat **OR** a qualifying Bryant air purifier to be eligible for the Bryant Bonus rebates. +
3. Products, eligible system combinations and reimbursement amounts are updated at the start of each promotion. Please see the latest program documents for eligible products. Program documents are stored on HVACpartners.com for your convenience.
4. All reimbursement claims must be filed at www.BryantPromotions.com. When more than one reimbursement type is available on a qualifying sale, the dealer must choose one reimbursement to claim for. Multiple reimbursements on the same sale are not permitted.
5. For qualifying sales, FAD can offer both their respective financing promotions and the Cool Cash product rebates to homeowners during the promotional period, but they **can only claim for ONE reimbursement from the factory/distributor**. The dealer is responsible for funding the other reimbursement 100%.

PROGRAM RULES

Program Overview

Bryant Bonus promotions are designed to promote sales of Bryant systems in the residential add-on and replacement market. Refer to the promotion documents and grid for the list of qualifying products and associated reimbursements.

Terms and Definitions

Equipment Names – Bryant equipment models are referred to by series: Evolution[®] System, Preferred[™] Series, or Legacy[™] Line.

MyHVACpin – *MyHVACpin number* is a four- or five-digit identification number that uniquely identifies a person - in this case, the dealer salesperson. For a dealer salesperson to receive sales credit, each dealer salesperson must have his or her own MyHVACpin number. When a person becomes a registered user of HVACpartners (meaning they have their own user name and password), they also are assigned a unique personal identification number, referred to as a MyHVACpin number. Salespeople/dealers must enter this number when filing claims in order to receive credit for the sale.

Sales Associates can learn their MyHVACpin number in one of the following ways:

- Log onto HVACpartners, click on My Profile, and scroll to the field labeled MyHVACpin
- Contact the distributor's HVACpartners' Administrator (who can look up the Sales Associate's profile listed in HVACpartners.com)
- Call the Bryant Solution Center at (888) 994-7237

Important: The *HVACpartners ID* number is not the same as the *MyHVACpin* number

- *HVACpartners ID* – identifies a company/dealer location
- *MyHVACpin number* – identifies a person - in this case, the dealer salesperson



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Key Dates

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Promotion terms subject to (1) product availability and (2) change or cancellation without prior notice.

Only Bryant systems or units purchased from participating dealers during the sales period and installed by the end of the installation period are eligible for the Bryant Bonus promotions. These promotions are not retroactive for homeowners who purchased qualifying equipment prior to the program start date. Bryant systems or units purchased after the sales period do not qualify for Bryant's Bryant Bonus promotions.

Any dealer enrolled in the previous period's consumer promotion will automatically be enrolled in the current consumer promotion unless their distributor has designated otherwise.

Bryant Promotion Website

All reimbursement claims must be filed at www.BryantPromotions.com. Training materials on use of the website are available from Bryant distributors and on HVACpartners.com on the Bryant Bonus page.

Contacts for Promotional Support

Dealer Resources

- General questions about Bryant Bonus: Bryant Solution Center 1-888-994-7237
- Bryant Bonus inquiries or other Bryant program questions: Bryant Distributor Territory Manager

Distributor Resources

- General questions about Bryant Bonus: Bryant Solution Center 1-888-994-7237
- General questions about Bryant Bonus, other factory-sponsored sales and marketing programs, or dealer promotion enrollment: Bryant Regional Sales Manager

Homeowner Resources

- General pre-sale inquiries: Bryant dealer or Bryant Consumer Relations at 1-800-428-4326
- Rebate claim & processing questions, or other rebate claim-specific inquiries: Bryant Bonus Claim Center at 1-877-390-3640

Homeowner Eligibility

Homeowners in the U.S. and Canada are eligible for the Bryant Bonus promotions. Only Bryant systems sold as a replacement for the homeowner's existing system or as an add-on to an existing home qualify.

Not eligible for the Spring promotions:

- Commercial or institutional applications
- Residential new construction applications or upgrades
- Multi-family applications
- Investors/investment properties



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Qualifying Products

Please refer to the current program documentation for eligible products.

Individual Unit Rebates: Definition

Reimbursements exist for non-system unit sales. The Spring Bryant Bonus document's section labeled "Individual Unit Rebates", and "Additional Rebates" illustrates the reimbursement(s) for an indoor unit with a control, but no outdoor unit; or an outdoor unit with a control but no indoor unit. No matching outdoor or indoor unit is required to qualify for the unit rebate.

Split System Rebate: Definition

To qualify for a split system rebate for Bryant Bonus, the homeowner must purchase a Bryant indoor unit (furnace, fan coil), a Bryant outdoor unit (air conditioner or heat pump) and a Bryant branded control or Bryant branded air purifier. The Bryant indoor unit, the Bryant outdoor unit, and the required control or air purifier must be listed on the current Bryant Bonus documents. No substitutions or competitive controls/air purifiers or other Bryant Corporation brand (Totaline, etc.) controls/air purifiers may be used.

Homeowners will have the option to use **either** a qualifying Bryant branded control/thermostat **OR** a qualifying Bryant air purifier to be eligible for the Bryant Bonus rebates.

Multiple Unit Rebates

Homeowners are eligible to receive multiple unit rebates for multiple purchases of the same product with eligible Bryant branded controls. However, multiple unit rebates require the completion of multiple rebate claim forms.

For example, if a homeowner purchases two Evolution® furnaces with two eligible Bryant branded controls, the dealer must complete two (2) separate rebate claim forms. One claim should be filed online via Bryantpromotions.com. Contact the Rebate Claim Center to have the 2nd claim filed.

FAD Instant Product Rebate

DISTRIBUTORS: Your organization will elect one of the two following options to offer dealers this Spring for product rebates. You are choosing whether to offer instant rebates to only Factory Authorized Dealers or all eligible Bryant dealers. PLEASE DELETE THE OPTION YOUR ORGANIZATION DID NOT CHOSE as well as this instructional note.

Option 1: Factory Authorized Dealers (FAD) have two (2) rebate options during the current rebate promotion. Active FAD members are eligible to offer a standard and an instant rebate. A standard rebate means the homeowner submits a claim online for the rebate amount and receives a debit card 4-6 weeks later. An instant rebate means the dealer subtracts the rebate amount directly from the homeowner's invoice at the time of purchase.

Option 2: Bryant dealers have two (2) rebate options during the current rebate promotion. They are standard and instant rebates. A standard rebate means the homeowner submits a claim online for the rebate amount and receives a debit card 4-6 weeks later. An instant rebate means the dealer subtracts the rebate amount directly from the homeowner's invoice at the time of purchase.

Please ensure the correct rebate form is used that matches the type of rebate being made available to the homeowner.

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Instant Rebate Process:

- 1) Make a Bryant Bonus sale and install the equipment per the promotion's deadlines.
- 2) Subtract the total rebate amount (from the Bryant Bonus rebate document) from the homeowner's invoice. The rebate must be clearly identified as a separate line item on the invoice as "Bryant Bonus Instant Rebate" and the total rebate amount shown.
 - a. Give the homeowner the dealer invoice showing where the applicable Bryant Bonus rebate amount has been taken off of the price. The amount must be labeled "Bryant Bonus Instant Rebate" clearly beside the rebate in order for the program administrator to verify the correct amount was given.
- 3) Fill out an instant rebate claim form with the required information.
 - a. Provide complete homeowner data on this form. If homeowner data is missing, the rebate cannot be processed. *The homeowner must sign and date the claim form and the homeowner invoice or they may not be considered valid.*
- 4) Keep a copy of the instant rebate claim form for dealer files, and send one copy to the distributor. Some distributors also require a copy of the homeowner's invoice.
- 5) *To claim back dealer reimbursement*, the dealer goes to www.Bryantpromotions.com and enters sale date and selects the *Bryant Rebate Promotion*. Should document the claim confirmation number.
 - a. Dealer enters eligible Bryant promotion products, purchase date, installation date and includes salesperson's MyHVACpin #.
- 6) **Upload a copy of the invoice to the Bryant Bonus administrator at www.BryantPromotions.com OR fax it to 1-877-390-3640.**
 - a. The invoice must include the date of sale, homeowner's name and address, signature, and model number and serial number of each product purchased. *Incomplete invoice information will not be accepted and will result in delays or non-payment of a reimbursement.*
 - b. Administrators will match the invoice with the online claim, verifying all information.
 - c. Bryant will fund the factory portion of the rebate to the distributor on a weekly basis.
 - d. The distributor will fund the distributor portion, plus the factory portion, back to the dealer.
 - e. A thank you note from Bryant will be mailed to the homeowner.

The dealer and distributor should keep their copies of the rebate claim form on file until:

- All rebates are paid
- Invoices have been paid

Instant Rebate Authorization

When a dealer submits an instant rebate claim on BryantPromotions.com, they are electronically agreeing to adhere to the terms and conditions and follow the instant rebate process outlined in this handbook. Once a claim is submitted dealer sales associates are confirming they understand the process required to file an instant rebate claim. If the dealership does not follow these procedures, the dealer principle understands the rebate claim will be rejected and the dealership will have to fund the entire cost of the rebate.



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Instant Rebate Complaints

Should a customer be concerned they did not receive the full amount of the instant rebate as outlined in the thank you letter mailed to them from Bryant, the customer care center will open a case and follow the outlined process:

- 1) Collect invoice and claim information submitted to the rebate center by the dealer
- 2) Request invoice from the homeowner
- 3) If, after reviewing the invoice submitted to the rebate center and the homeowner invoice, the provided rebate is not clearly labeled as its own line item as "BRYANT BONUS INSTANT REBATE", or the rebate amounts do not match, the customer service center will contact the dealer for clarification within 3 business days of opening the case.
 - a. Dealer has 10 business days from the initial call to work with the customer service center and come to a resolution where the homeowner is provided the full rebate owed based on the products purchased.
- 4) If there is no resolution within 10 business days of the first call made to the dealer by the customer care center, and Bryant has provided the homeowner with a check, the original Instant Rebate Claim submitted by the dealer will be reversed and Bryant will not pay the factory contribution portion of the claim.
 - a. It is the distributor's discretion how they would like to proceed with the distributor contribution portion of the original claim.

Rebates & Financing on the Same Sale

Bryant dealers may still offer financing, including the promotion plans referenced above, on the same sale that a rebate is provided to the homeowner. In these cases, dealers must choose which of the two reimbursements they want to claim for. *Dealers may not claim for more than one qualifying reimbursement per sale.* The dealer is responsible for fully-funding (100%) whichever option they choose to not claim for.

Wild Card

The wild card gives Bryant dealers a flexible reimbursement option to off-set the cost of lead generation activities that result in the sale of a qualifying Evolution® System. This option may also be used as a salesperson spiff or additional consumer rebate to add incentive for the sale of Evolution® System equipment. **Wild Card is available to both Factory Authorized Dealers and non-Factory Authorized Dealers.**

Wild Card Process:

1. Bryant dealer sells qualifying Evolution® System equipment as shown on the current Wild Card Bryant Bonus Product Rebates document during eligible Bryant Bonus dates.
2. *To claim back dealer reimbursement*, the dealer goes to www.Bryantpromotions.com and enters sale date and selects the wild card promotion.
 - a. Dealer enters eligible Bryant wild card promotion products, purchase date, installation date and includes salesperson's MyHVACpin #.
3. Dealer selects what lead generation activity they are claiming for, or if they will utilize the reimbursement for a sales spiff.
4. Dealer submits claim, documenting the claim confirmation number.
5. Bryant Bonus Administrator audits claim, confirms accuracy of homeowner / dealer information.
6. Bryant Bonus Administrator calculates dealer wild card reimbursement and processes transaction.
7. Bryant Bonus Administrator processes funding file to the distributor for wild card promotion reimbursement on a weekly basis.
8. Distributor reimburses dealer per distributor's standard reimbursement practices.



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Rebate Claim Forms

Bryant Bonus 3-ply rebate claim forms are required for each product rebate claim for the Spring promotion.

The claim forms can be ordered by distributors as needed from SAP. Dealers can obtain the claim forms from their distributor. Rebate claim forms from previous promotions will not be accepted and should be discarded.

Claim forms are not required for financing or wild card reimbursements.

Illegal Activity: *Dealers and distributors **may not** charge the homeowner for any portion of a rebate / reimbursement, as this activity is considered fraud and is illegal.*

Promotion Deadlines

Accounting guidelines and regulations will not permit claim exceptions to be funded from the factory beyond the published deadline. Missed deadlines due to rebate claim system errors will be addressed on a case-by-case basis.

Payment for a claim submitted beyond the published deadline is the responsibility of the distributor and dealer and at their discretion for reimbursement. In this event, Bryant will not be responsible or liable to share in the cost of the homeowner rebate.

Adjustments to a Filed Claim

In the event a filed and accepted claim from the current promotion needs to be adjusted, please note and follow these important dates and stipulations:

- Current promotion reimbursements may be adjusted up to 7 days prior to the end of the promotion period. Adjustments may only account for increases in the rebate value due to errors or additions in the initial processing. Contact Rebate Headquarters at 1-800-236-4603 for more information.
- Rebates from previous Bryant Bonus promotions will not be re-issued.

DISTRIBUTORS: Your organization will elect one of the two following options to offer dealers this Spring for product rebates. You are choosing whether to participate in Standard Contribution or No Dealer Contribution. PLEASE DELETE THE OPTION YOUR ORGANIZATION DID NOT CHOSE as well as this instructional note.

Standard Rebate Reimbursement Participation/Cost

If a distributor is participating in the standard reimbursement rebate grid, the cost of the Bryant Bonus homeowner rebate is shared by the dealer, distributor, and Bryant.

- Bryant and distribution each underwrite $\frac{1}{4}$ or 25% of the cost of the standard rebate; dealers are responsible for $\frac{1}{2}$ or 50% of the cost of the rebate.
- Distributors are billed for $\frac{3}{4}$ or 75% of the cost of the rebate, which also includes all administrative fees.
- Distributors may not charge dealers for more than $\frac{1}{2}$ of the cost of the rebate.
- Before enrolling dealers in the program, distributors must tell dealers they are responsible for paying $\frac{1}{2}$ of the cost of the rebate.

No Dealer Contribution (NDC) Rebate Participation/Cost

If a distributor has chosen to participate in the no dealer contribution (NDC) rebate grid, the cost of the Bryant Bonus homeowner rebate is shared by the distributor and Bryant.

- Bryant and distribution each underwrite $\frac{1}{2}$ or 50% of the cost of the NDC rebate.
- Distributors are billed for $\frac{1}{2}$ or 50% of the cost of the rebate, which also includes all administrative fees.
- Distributors may not charge dealers for the cost of the rebate.
- Bryant will invoice the distributor on a weekly basis throughout the duration of the program for all homeowner related rebates that were paid the prior two weeks.

Any deviation from the above is in violation of the program rules.



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Dealer Billing

Distributors are responsible for invoicing/crediting Bryant dealers for their portion of the reimbursements.

Rebate Activity Reports

Dealers and distributors can use the "Reports" feature at www.BryantPromotions.com to view rebate activity reports. The report updates are provided on a daily basis indicating the previous day's activity. This data is subject to change any time during the promotion due to adjustment requests, product returns, etc.

Program Materials

The following will be available to distributors through SAP prior to the promotion start date. Dealers can request these materials from their distributor.

| Description | SAP Number | Price |
|---|-----------------|------------------------|
| Bryant Comfort Solutions Consumer Brochure (not promotion-specific) | 01-8110-1157-25 | \$19.75/ package of 25 |
| 2017 Spring Bryant Bonus Claim Form – Standard Rebates | 01-8110-1375-25 | \$3.00/package of 25 |
| 2017 Spring Bryant Bonus Claim Form – Instant Rebate | 01-8110-1374-25 | \$3.00/package of 25 |

Co-Op Funds

Co-op dollars from the "end-user media communications" portion of marketing funds may be used to advertise and promote Bryant Bonus.

Dealer Program Enrollment

To participate in the Bryant Bonus program, dealers should notify the distributor. In turn, the distributor will use HVACpartners.com to enroll the dealer in the promotion. Only registered dealers are eligible to participate in the Bryant Bonus promotion.

Distributors must enroll dealers in the program by the dates outlined in Section 2.03 (generally 15 days prior to the end of the selling period).

Distributors may un-enroll a dealer from further participating in the program. If a dealer attempts to claim a reimbursement after the dealer un-enrollment date became effective, the Bryant Bonus Claim Center will reject the reimbursement claim.