



# User Guide

Lennox Comfort Advisor SPIF

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If you need additional assistance, please call  
Lennox Promotions at 1-855-458-5462  
or email us at [lennoxpromotions@360incentives.com](mailto:lennoxpromotions@360incentives.com)

# Registering for Lennox Spif Programs

To earn Lennox Spifs, you must register through LennoxPros.com.

## STEP 1

[www.LennoxPROS.com](http://www.LennoxPROS.com)

1. Resources > Sales Tools
2. Promotions > SalesPerson Spifs
3. Click on Get Started
4. Select Register Now

## STEP 2

Complete all required fields

Ensure to enter correct:

1. Lennox Dealer number
2. Work Location

The Lennox Dealer number can be alpha numeric and consists of 6 characters, 1 letter followed by 5 numbers : X11111.

## STEP 3

Review & Accept Terms

Click [I Agree | Register Me Now](#)

## STEP 4

After approval (typically less than 1 business day) you will receive an email confirmation. You can login and start submitting claims.

# Navigating the Lennox Promotions Portal

Once you are approved to participate in Lennox Programs, you can login using your credentials provided at registration and view the programs you are eligible for at any given time, along with the eligible models and amounts.

## Your Information

- Shows your secure personal information.

## Available Programs

- Shows all available incentive programs and their eligible timeframes.
- Click “Eligible Models and Amounts” for details about the eligible models, rebate amounts and required CyberScholar eLearning modules.

## Previous Activity

- Displays your last 5 transactions and each claim status.
- Entered** means the claim has been started but not submitted for approval.
- Submitted** means the claim has been entered with back-up documentation and submitted for approval.
- On Hold** means your claim is being further reviewed.
- Approved** means the claim is in process for payment.
- Paid** means the funds for the claim have been paid to you.

The screenshot shows the Lennox Promotions Portal interface. At the top, there is a navigation bar with the Lennox logo and links for Home, Activity, Payments, Rules, Your Profile, Help and Training, and Logout. Below the navigation bar, there are two main sections: "Your Information" and "Available Programs".

**Your Information:** This section contains input fields for "Name:" and "Employee ID:". Below these fields is a "More Activity" button.

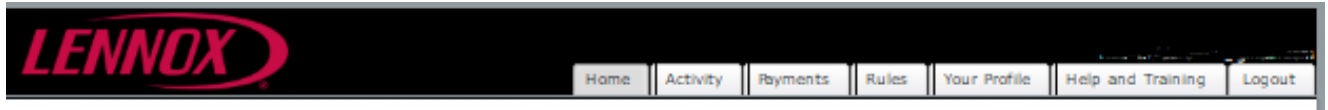
**Available Programs:** This section features a prominent message: "\*Questions about your SPIFF claim? You can email us at: lennoxpromotions@360incentives.com or effective immediately please update our phone number to 1-855-458-5462 to ensure a prompt and courteous reply to your claim questions!\*". Below this message, there is a "Spiffs" section with a card for the "2017 Winter Retail Salesperson Spiff-South East". The card includes a "75 days left" badge, a description, start/end/cut-off dates, and a link to "Eligible Models and Amounts" with an "Enter Claims" button.

**Previous Activity (Click on transaction number to view more details):** This section contains a table with the following data:

Date	Season Number	Transaction Number	Customer	Store Invoice	Claim Amt.	Status	Attachment
02/11/2017	1189017	<a href="#">46091881</a>	test test	123	\$25.00	On Hold	
02/10/2017	11890381	<a href="#">46037064</a>		34739	\$0.00	Submitted	
02/10/2017	11890381	<a href="#">46037052</a>		34739	\$0.00	Submitted	
02/10/2017	11890381	<a href="#">46037033</a>		34739	\$0.00	Submitted	
02/02/2017	11793972	<a href="#">15726753</a>		31685	\$0.00	Submitted	

Below the table, there is a "Last 5 Transactions" label and a "More Activity" button. At the bottom of the page, there are logos for Entrust and 360, and a footer with the phone number 1-855-458-5462 and links for Privacy Statement and Disclaimers.

# Navigating the Lennox Promotions Portal



## Lennox Promotions Tabs

- **Home** always returns you to the main page.
- **Activity** shows previous activity and status of claims. You may filter your search with the available options.
- **Payments** shows you all your payment references.
- **Rules** outlines the program terms and conditions.
- **Your Profile** allows you to view your personal information and change your password.
- **Help and Training** is where you can find FAQs, user guides and other training materials.
- **Logout** will log out of the Lennox Promotions portal.

# Submitting a Lennox Claim

On the homepage you can check which programs are active and see eligibility dates, eligible models, rebate amounts and your points leaderboard.

## STEP 1

Once logged in to the claim portal through lennoxpros.com, click "Enter Claims" under the program badge.

## STEP 2

Start typing the serial number of the model purchased to auto-populate the model or use **Quick Search - Model Purchased** field and start typing the model number. The available options will populate in the drop down menu.

After selecting the correct model, provide required details about your purchase:

- **Serial number**
- **Sales/Install Date**
- **Homeowner information**

Once complete, click

**Add Transaction**

or

**Add And Retain Customer Info**

if you are entering more than one model for the same invoice. This will keep the homeowner information populated. For qualifying systems, please be sure to enter all models including the control/thermostat. Each claim will be added to the "Transaction Summary" table at the bottom of the page.

When you are ready to submit your back-up documentation, click :

**Submit Claims For Approval**

**2017 Winter Retail Salesperson Spiff-South East**

**75** days left

**Description: 2017 Winter Retail Salesperson Spiff-South East**

**Start Date:** 01/02/2017  
**End Date:** 04/14/2017  
**Cut off Date:** 04/28/2017

[Eligible Models and Amounts](#)

**Enter Claims**

**Quick Search**

Enter the first few characters - select the right item and press Select.

Model: [SL] **Select**

**Product Information**

- SL18XC1 | Air Conditioners | Lennox
- SL18XP1 | Heat Pumps | Lennox
- SL280DFV | Gas Furnaces | Lennox
- SL280UHV | Gas Furnaces | Lennox
- SLO183V | Oil Furnaces | Lennox
- SLO185V | Oil Furnaces | Lennox
- SLP98DFV | Gas Furnaces | Lennox
- SLP98UHV | Gas Furnaces | Lennox

**Homeowner Information**

Serial Number: [ ]  
Product Line: [ ]  
Model: [ ]  
Homeowner Inv #: [ ]  
Sale Date: [ ]  
Installation Date: [ ]  
Sell Price: [ ]  
Quantity: [1]

First Name: [ ]  
Last Name: [ ]  
Phone: [ ]  
Email: [ ]  
Gender: -- Select --  
Approx Age: -- Select --  
Address: [ ]  
City: [ ]  
State: -- Select --  
Zip: [ ]

**Quick Search**

Enter the first few characters - select the right item and press Select.

Model: SL18XP1 | Heat Pumps | Lennox **Select**

**Product Information**

Serial Number: 1111X11111  
Product Line: Heat Pumps  
Model: SL18XP1  
Homeowner Inv #: [ ]  
Sale Date: [ ]  
Installation Date: [ ]  
Sell Price: [ ]  
Quantity: [1]

**Homeowner Information**

First Name: test  
Last Name: test  
Phone: [ ]  
Email: test@noemail.com  
Gender: -- Select --  
Approx Age: -- Select --  
Address: 123456 test  
City: Montreal  
State: CO  
Zip: 12345

**Add Transaction** **Add And Retain Customer Info**

**Transaction Summary Click On Transaction Number To Edit**

Transaction Number	Model	Customer Name	Phone	Homeowner Inv #	Sale Date	Claim Amt.
No records to display.						

**Submit Claims For Approval**

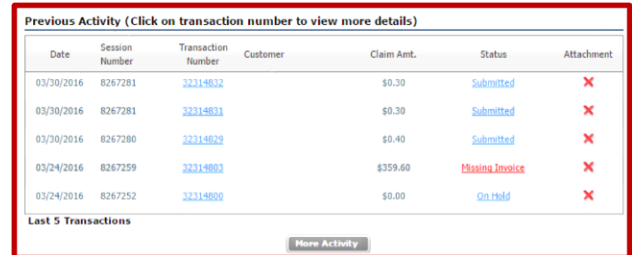


# Reviewing Your Claims

## STEP 1

Once Claims have been entered into the system, they will generate a **Session Number** used to identify your claim in the system.

Each model entered will also have a **Transaction Number** within that session. On the homepage, you will see the last five (5) transactions entered.



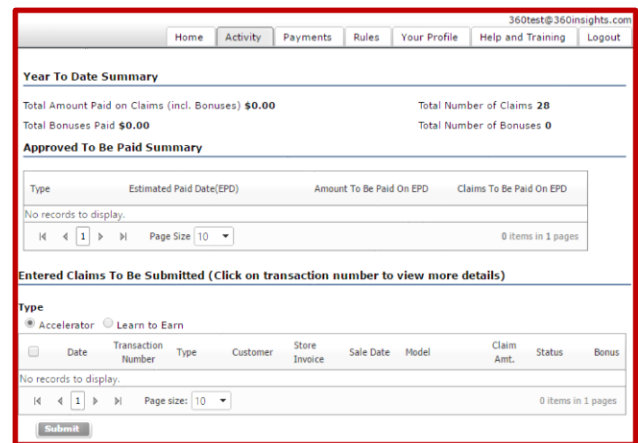
Previous Activity (Click on transaction number to view more details)

Date	Session Number	Transaction Number	Customer	Claim Amt.	Status	Attachment
03/30/2016	8267281	<a href="#">32314832</a>		\$0.30	Submitted	✗
03/30/2016	8267281	<a href="#">32314831</a>		\$0.30	Submitted	✗
03/30/2016	8267280	<a href="#">32314829</a>		\$0.40	Submitted	✗
03/24/2016	8267259	<a href="#">32314803</a>		\$359.60	Missing Invoice	✗
03/24/2016	8267252	<a href="#">32314800</a>		\$0.00	On Hold	✗

Last 5 Transactions [More Activity](#)

## STEP 2

To review all transactions claimed, click on the second tab at the top labeled "Activity". Here, all transactions entered in the last month will be displayed. Estimated pay dates, amounts, and claims as well as year to date information can be found at the top of the screen as well. Additionally, if a claim is on hold or declined, hover over the question mark to get more details.



360test@360insights.com

Home Activity Payments Rules Your Profile Help and Training Logout

### Year To Date Summary

Total Amount Paid on Claims (incl. Bonuses) <b>\$0.00</b>	Total Number of Claims <b>20</b>
Total Bonuses Paid <b>\$0.00</b>	Total Number of Bonuses <b>0</b>

### Approved To Be Paid Summary

Type	Estimated Paid Date(EPD)	Amount To Be Paid On EPD	Claims To Be Paid On EPD
No records to display.			

0 items in 1 pages

### Entered Claims To Be Submitted (Click on transaction number to view more details)

Type:  Accelerator  Learn to Earn

Date	Transaction Number	Type	Customer	Store Invoice	Sale Date	Model	Claim Amt.	Status	Bonus
No records to display.									

0 items in 1 pages

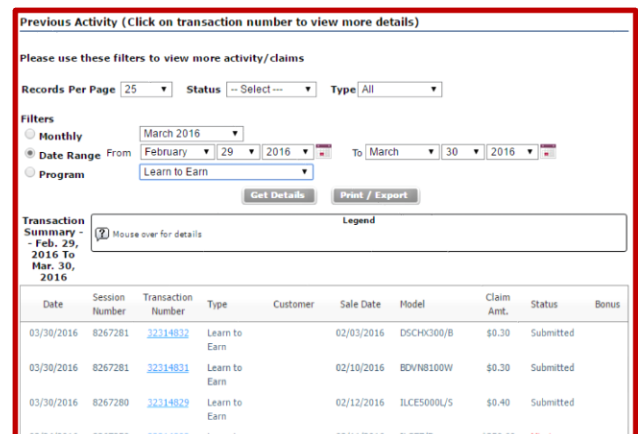
[Submit](#)

## STEP 3

Previous activity can be displayed by choosing different filter options.

Claims can be filtered by:

- Status
- Month
- Date Range
- Program Name



Previous Activity (Click on transaction number to view more details)

Please use these filters to view more activity/claims

Records Per Page: 25 Status: --Select-- Type: All

Filters

Monthly: March 2016

Date Range: From February 29, 2016 To March 30, 2016

Program: Learn to Earn

[Get Details](#) [Print / Export](#)

### Transaction Summary - Feb. 29, 2016 To Mar. 30, 2016

House over for details Legend

Date	Session Number	Transaction Number	Type	Customer	Sale Date	Model	Claim Amt.	Status	Bonus
03/30/2016	8267281	<a href="#">32314832</a>	Learn to Earn		02/03/2016	DSCHX300/B	\$0.30	Submitted	
03/30/2016	8267281	<a href="#">32314831</a>	Learn to Earn		02/10/2016	BDVNB100W	\$0.30	Submitted	
03/30/2016	8267280	<a href="#">32314829</a>	Learn to Earn		02/12/2016	ILCES000L/S	\$0.40	Submitted	
03/24/2016	8267259	<a href="#">32314803</a>	Learn to Earn		03/13/2016	ILCES000L/S	\$359.60	Missing Invoice	
03/24/2016	8267252	<a href="#">32314800</a>	Learn to Earn		03/13/2016	ILCES000L/S	\$0.00	On Hold	

# Tracking Your Payments

## Payments View

Information on payment dates and amounts can be found under the "Payments Tab

To review payments, choose the date range in question and click "Get Details".

Returned results will indicate the following:

**Paid Date:** The date claims were paid out

**Type:** What type of claim was paid,

**Payment:** The 360incentives internal payment number generated

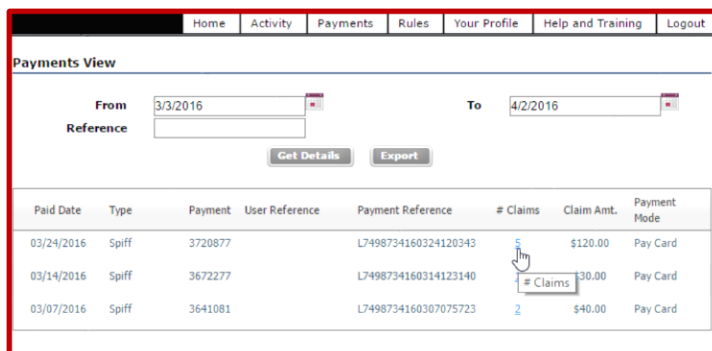
**Payment Reference:** The payment number

generated by the bank or card company for funds loaded

**# Claims:** Click on the blue number to see a breakdown of the claims paid.

**Claim Amount:** How much in total was paid for this payment

**Payment Mode:** How the funds were paid



The screenshot shows a web application interface with a navigation bar at the top containing links for Home, Activity, Payments, Rules, Your Profile, Help and Training, and Logout. Below the navigation bar is a section titled "Payments View". This section includes a date range selector with "From" set to 3/3/2016 and "To" set to 4/2/2016, and a "Reference" input field. There are "Get Details" and "Export" buttons. Below this is a table with the following columns: Paid Date, Type, Payment, User Reference, Payment Reference, # Claims, Claim Amt., and Payment Mode. The table contains three rows of data:

Paid Date	Type	Payment	User Reference	Payment Reference	# Claims	Claim Amt.	Payment Mode
03/24/2016	Spiff	3720877		L7498734160324120343	5	\$120.00	Pay Card
03/14/2016	Spiff	3672277		L7498734160314123140	3	\$30.00	Pay Card
03/07/2016	Spiff	3641081		L7498734160307075723	2	\$40.00	Pay Card

## Reloadable Spif Card

**Newly registered accounts will receive a new card in the mail once your Spif account is approved. \*Please allow 7-10 business days**

- Funds are loaded onto your reloadable VISA Spif card only once claims are Approved and Paid.
- Payments are issued weekly, with the payment cycle from claim submission to funds on cards taking roughly 2 weeks.
- For question concerning card specifics and balance details, please contact the card provider, SWIFT, by dialing the number on the back of your card.
- For lost or stolen cards please contact SWIFT :

1 -866 -230-3809

# Safety Bulletin

## How to Protect Your Prepaid Card

You work hard for your money, and you want to make sure your funds are safe. Protecting your prepaid card is important to us, too. That's why your card is packed with many of the same security features as your personal credit and debit cards.

With today's savvy scammers and fraudsters, protecting your prepaid card takes extra vigilance from you as well. Here are some safe spending tips you can follow to protect your prepaid card.



### When Shopping Online

- Stick to established businesses that are easy to contact if there's an issue with your order.
- Double check online store policies before clicking "Buy".
- Shop at sites with "https:" in their address. The 's' stands for secure and means that all communication between your browser and the website is encrypted.
- Always keep copies of your confirmation codes and receipts.



### When You're Using Devices

- Use secure passwords that are complex (at least 8 characters, including at least one each of the following: uppercase and lowercase letters, numbers and special characters), and change them frequently. Avoid shared or public devices, if possible.
- If you must use a shared computer, be sure to log out of your account when finished.
- Keep operating systems, software and browsers up to date. Releases often include important bug fixes and security updates.
- Install security software (i.e., antivirus and anti-spyware) on your personal devices.
- Turn off autofill settings on your personal devices. The convenience isn't worth the risk if your device is lost or stolen.



### When You're Out and About

- Only carry your prepaid card when you plan to use it.
- Keep your prepaid card out of sight until it's time to use it and put it away immediately. Don't give thieves an opportunity to take a picture or jot down your number.
- Stash your card in a wallet or purse and keep it close to your body where it is less likely to be snatched.
- Double-check to make sure you have your card before leaving a restaurant or other business



### When Your Card May Have Been Compromised

- Call 866-230-3809 to report lost cards and suspected fraud immediately. The issuer will block your card number so no one else can use it, and you'll get a replacement card in 7-10 business days.
- Dispute\* fraudulent activity. Here's how:
  1. Visit [www.prepaidcardstatus.com](http://www.prepaidcardstatus.com) and log in using your 16-digit card number and 3-digit security code.
  2. Select the Action drop-down menu.
  3. Choose the option to file a dispute claim.

\*A dispute investigation may take up to 120 days for final resolution.



### When You're being Solicited

- Only give out your card number on calls that you initiate with a business you trust.
- Don't fall victim to phishing scams: Never reply to or click on an email that asks for your personal information!
- Don't buy anything from an unsolicited phone call.

# Questions?

## WE'RE HERE TO HELP

Please feel free to reach out to the  
Client Success Team  
if you need assistance

Email box is monitored and replies  
are prompt

**Email:**

*lennoxpromotions@360incentives.c  
om*

You can also call the dedicated  
support line

**Phone: 1-855-458-5462**