



CONTRACTOR SERIAL TOOL

PAYMENT METHOD REFERENCE GUIDE

Check out this helpful user guide for you to select, set up and manage your payment methods for claims entered through the Contractor Serial Tool (CST). Claim your Pro Partner rebates and rewards with confidence by understanding the differences in each payment option and choosing the right one for you and the programs you participate in.

The CST integrates with several different programs and it's important to know about the payment options available for each program. This guide will walk you through the different payment method options available.

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It's important to know that the Contractor Serial Tool (CST) offers Rheem® Pro Partner contractors different rebate and reward payment method options. The CST makes it easy for you to submit a claim one time, and push out to multiple program components, depending on the programs or promotions you participate in.

Each section below outlines the payment options for the different program components of the CST. Every program component may not apply to you depending on your business type, program participation and use of the CST. Each program you are involved in will outline the payment methods available for that program in the program guide.

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Rheem Pro Partner
REBATES

The payment method options outlined below are available for you to receive Rheem® rebates for promotions run through the Contractor Serial Tool (CST) on My.Rheem.com.

Rheem Pro Partner rebate promotions are only available to HVAC Pro Partners.

Rheem® Pro Partner REBATES

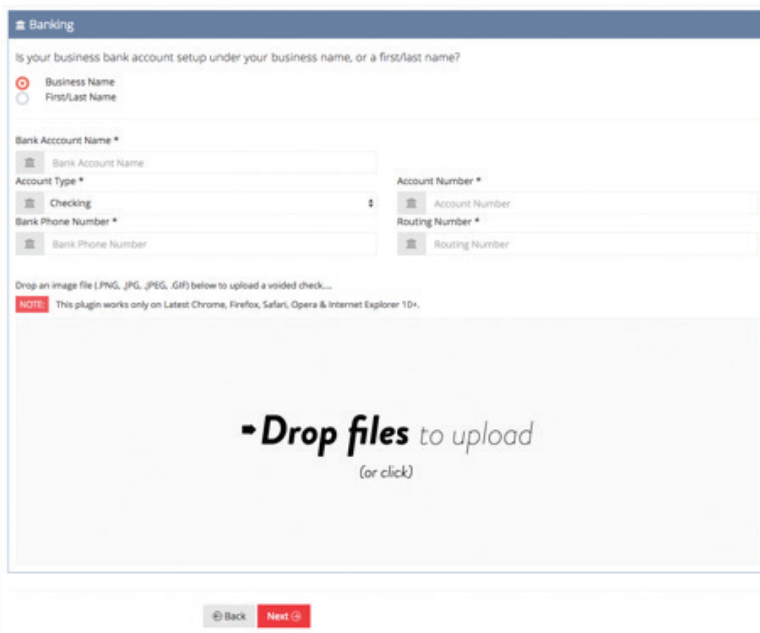
DIRECT DEPOSIT

To receive Rheem Rebates directly to your business, you will need to set up your Payment Method on the Contractor Serial Tool (CST) Dashboard as Direct Deposit. **IMPORTANT: You must set up a payment method before you can submit any claims through the CST and My.Rheem.com. Once you set up this payment method it will be saved for future promotions hosted through the CST.**

All user accounts set up under your business profile on My.Rheem.com will be associated with this Direct Deposit account, meaning all claims submitted by any user on your account will fund into this Direct Deposit account. Once the bank account information is submitted, visibility to the bank account info will be protected and other users will only be able to see basic information if they review in the Payment Method area on the CST. To review a step-by-step guide of how to set up your payment method, please review the CST User Guide on the CST Dashboard Help box, located under the Marketing menu on My.Rheem.com.

To set up your Direct Deposit account, you will need to provide the following information:

- Bank Account Name
- Account Type
- Account Number
- Routing Number
- Bank Phone Number
- Copy of a Void Check



The screenshot shows a web form titled "Banking" with the question "Is your business bank account setup under your business name, or a first/last name?". There are two radio buttons: "Business Name" (selected) and "First/Last Name". Below this are several input fields: "Bank Account Name", "Account Type" (with a dropdown menu set to "Checking"), "Bank Phone Number", "Account Number", "Routing Number", and "Bank Phone Number" (repeated). At the bottom, there is a red "Next" button and a "Back" button. A large area in the center of the form contains the text "Drop files to upload (or click)".

PROBLEMS WITH BANK ACCOUNT VALIDATION?

If your account validation is rejected for any reason, you will be notified via email of what is needed to resolve any issues. Until you resolve these issues, you will be unable to receive any rebate funds, or submit any additional claims.

For assistance or questions, contact help@myrheem.com.

Once you have submitted your banking information, it will be validated within 5–7 business days during which you will be able to submit claims through the CST. Validation will include confirmation that the account information provided is a valid business bank account (not a personal checking or savings account). **Once validated, this method of payment will be saved to your business profile in My.Rheem.com as your preferred method of payment for all Rheem Rebates entered through the CST.**

To change your Payment Method from Direct Deposit to Prepaid Card, or for additional questions with Direct Deposit setup on the CST, please contact help@myrheem.com.

**Please allow 5 business days when requesting a payment method switch.*

Rheem® Pro Partner REBATES PREPAID CARD



To receive Rheem Rebates directly to an individual (i.e. contractor, installer, sales associate, etc.), you will need to set up your Payment Method on the Contractor Serial Tool (CST) Dashboard as Prepaid Card.

IMPORTANT: You must set up a payment method before you can submit any claims through the CST on My.Rheem.com. Once you set up this payment method it will be saved for future promotions hosted through the CST.

If Prepaid Card is selected as the Payment Method for a contractor business, all users under that business account will need to register for a Prepaid Card to receive their individual rebate funds. The re-loadable Rheem Visa® Prepaid Card is tied to an individual contractor, sales associate or installer.¹ These cards are re-loadable and will be used to load funds for that individual for any Rheem promotions where claims are submitted through the CST.² To review a step-by-step guide of how to set up your payment method, please review the CST User Guide located in the CST Dashboard Help box.

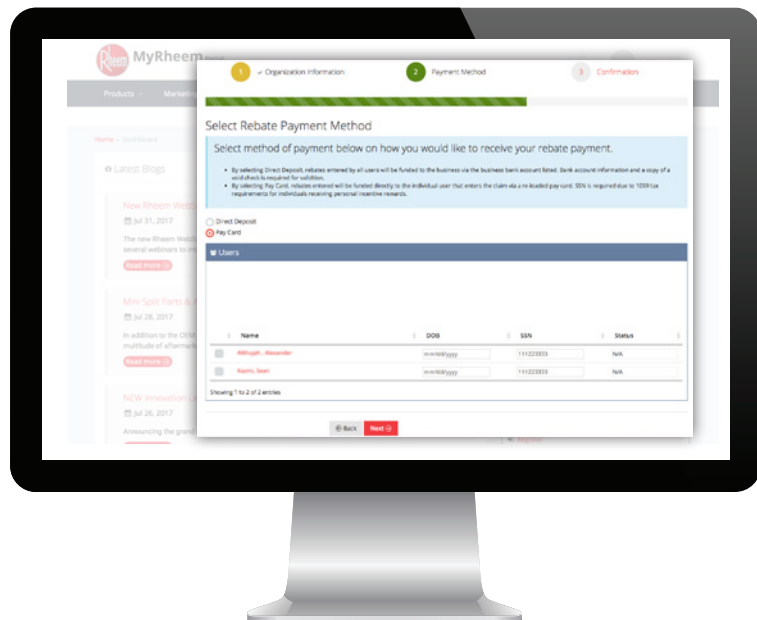
You will need to provide the following information:

- Date of birth (DOB) of individual
- Social security number³ (SSN) of individual

Once you have submitted your information, you can submit claims through the CST.

Once your payment method is set up as Prepaid Card, this will be saved to your business profile in My.Rheem.com as your preferred method of payment for all Rheem Rebates entered through the CST.

To change⁴ your Payment Method from Prepaid Card to Direct Deposit, or for additional questions with Prepaid Card setup on the CST, please contact help@myrheem.com.



¹Use your Visa Prepaid card anywhere Visa debit cards are accepted in the United States. The card may not be used at any merchant, including internet and mail or telephone order merchants, outside of the United States. Card is issued by The Bancorp Bank, Member FDIC, pursuant to a license from Visa U.S.A. Inc. Your use of the prepaid card is governed by the Cardholder Agreement, and some fees may apply. ²Each payment will be delivered via email with instructions for requesting or loading your Visa prepaid card. You must request or load your card within 3 months from the date these instructions are sent via email. The link to access your payment expires after that time. ³Due to 1099 tax requirements for individuals receiving personal incentive rewards, an individual's SSN and DOB are required. ⁴Please allow 5 business days when requesting a payment method switch.

This is not a gift card. Please note that prepaid cards are subject to expiration, so pay close attention to the expiration date of the card.

Rheem® Pro Partner REBATES PREPAID CARD

Ordering Your Card

When you qualify for your first rebate, your payment will be delivered via email from notification@360digitalpayments.com. The link in the email will take you to 360digitalsolutions.com. Once on the site, follow the instructions to:

1. Select a username and password.
2. Complete / Review your profile and select a security question.
3. Order your re-loadable Visa Prepaid Card.

Please note, you must order your card within 3 months from the date the payment email is sent. The link to access your payment expires after that time.

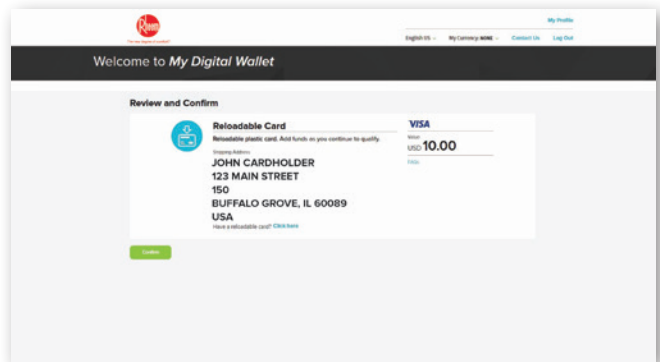
After you order your card, it will be mailed to you within 7–10 business days funded and ready to use.

You can access your online account for your re-loadable Prepaid Card at 360digitalpayments.com, where you can quickly and easily:

Check your balance and view transaction history

Update profile information (Name / Billing Address) associated with your card

Access live support 24/7 by contacting the toll-free number listed on the back of the card: **866.230.3809**



Digital Load Delivery

Once you receive your physical prepaid card, future loads are sent to you, as the cardholder, via email once you have rebate funds available. Every load will initially be sent from the following email address: **notification@360digitalpayments.com**.

Resends will be sent from **notification@360digitalpayments.com**. When you open the email this is what you will see:

- Each email contains the load value, reference code and instructions for what to do if you need assistance. The smart link will take you to the cardholder self-service website.

Please note, you must load your card within 3 months from the date the load email is sent. The link to access your payment expires after that time.



Rheem® Pro Partner REBATES PREPAID CARD

Account Login Page

Once you click on the smart link from your load notification email, you will be directed to 360digitalpayments.com. Log in using the username and password you created.

Loading Funds

There are two different methods to load the funds onto your Prepaid Card:



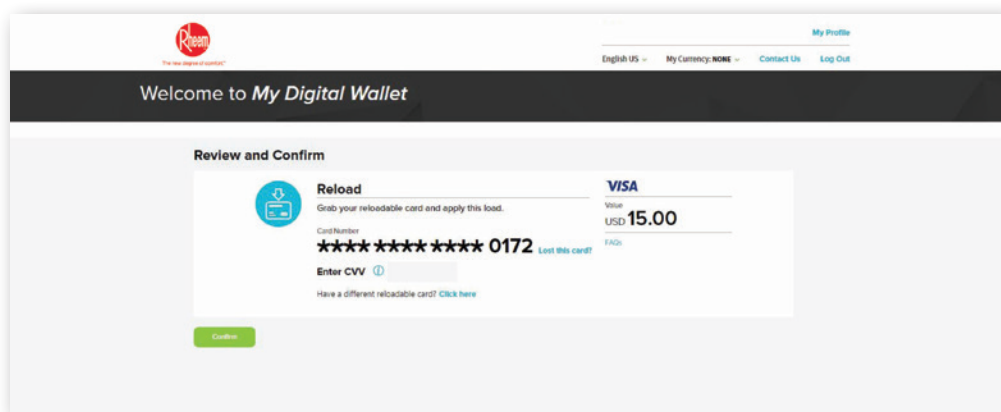
Option #1 – Click on the smart link in the email, which allows you to submit the funds to your Prepaid Card.

Option #2 – Manually enter the code, after logging in at 360digitalpayments.com.

Note: You will need to have your reloadable card in hand to load your funds.

Option #1 – Using the Smart Link

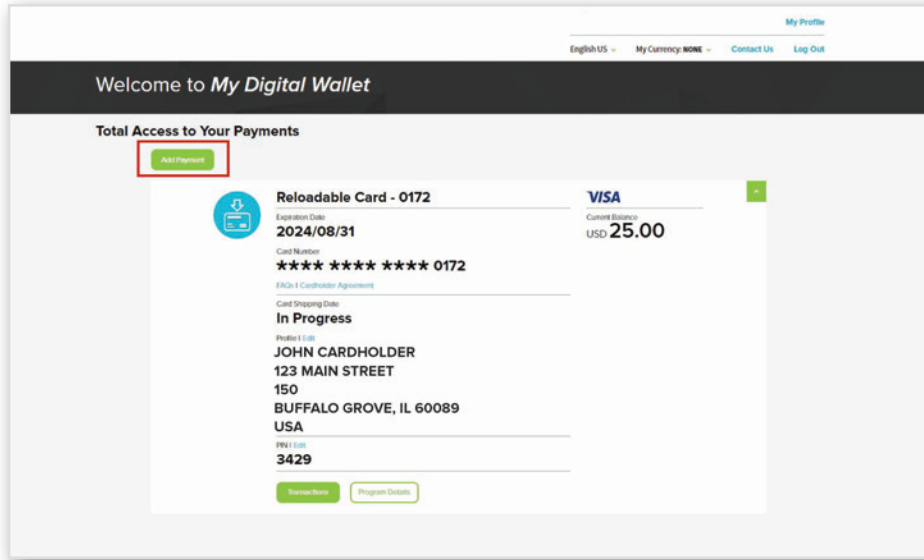
After logging in at 360digitalpayments.com, you will be taken directly the reload page. Your card number will be prepopulated, making it easy to identify which card you are loading. Just enter the 3-digit security from the back of your prepaid card and select “Confirm” to securely and instantly load your card.



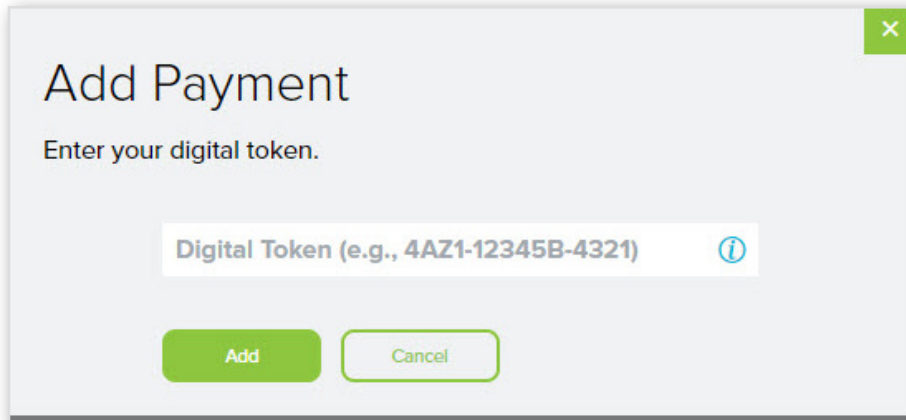
Rheem® Pro Partner REBATES PREPAID CARD

Option #2 – Manual Entry

If you choose the manual entry route, this means after you have logged into 360digitalpayments.com using your username and password, you can select the Add Payment button.



You will then be prompted to enter the digital token from your payment email. Once you enter the token, you will be taken to the reload page. From there, follow the same steps outlined in Option #1 to securely and instantly load your Prepaid Card.



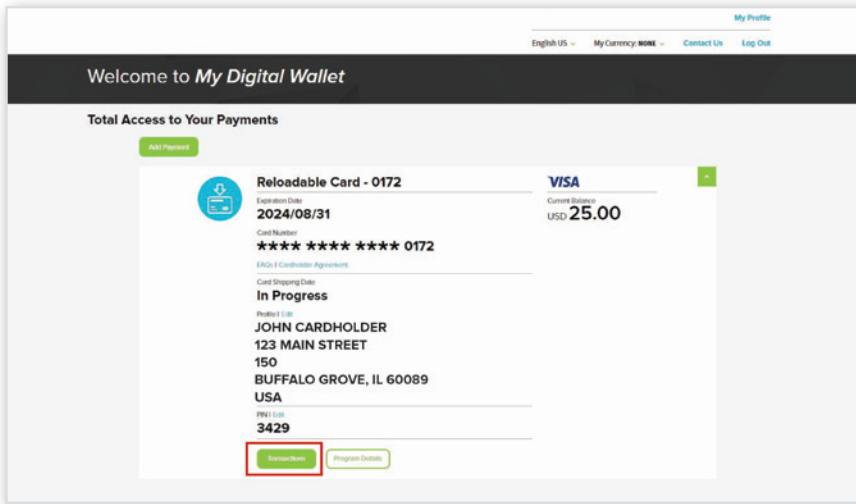
Rheem® Pro Partner REBATES PREPAID CARD

Your Card Details

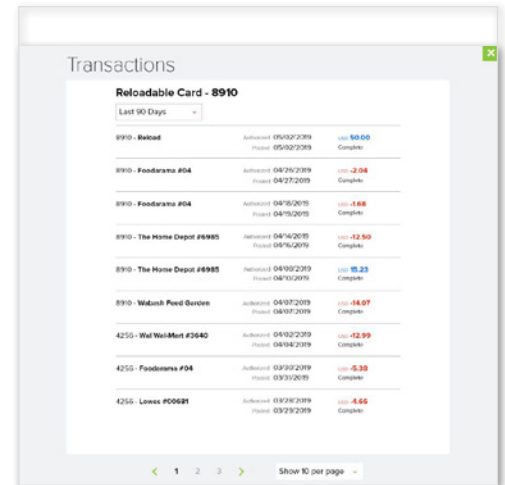
Transaction History

You can log into your Digital Wallet at 360digitalpayments.com at any time to see your transaction history, view your account balance, update your profile, view / change your PIN and more.

Every time you load funds onto your card, the balance will update immediately, as the funds are added in real-time. You can find a record of each fund you loaded by selecting the “Transactions” button.

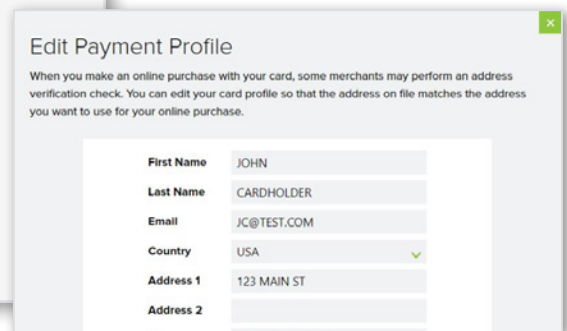
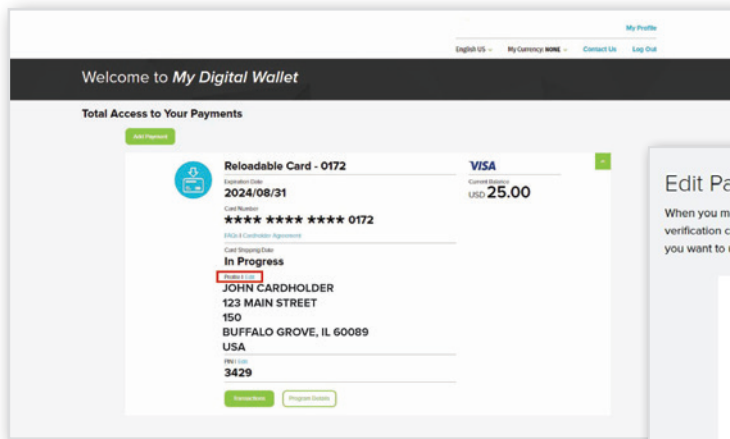


The transaction history will also list all spend activity such as purchases, ATM withdrawals and cash advances, thus making 360digitalpayments.com a cardholder’s one-stop shop!



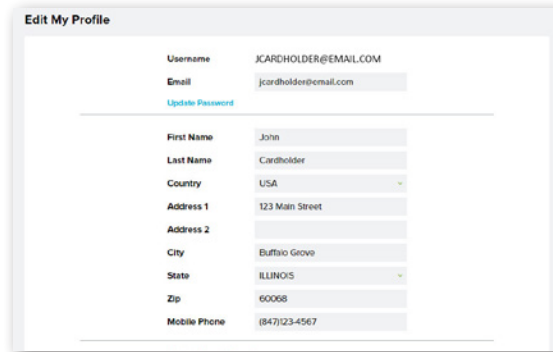
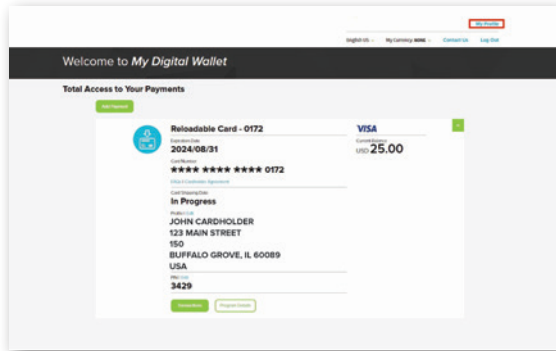
Update Your Payment Profile

Your payment profile consists of your first and last name, mailing address, email and phone number. When making online purchases with your card, some merchants may perform an address verification check. Make sure your payment profile address matches the address you want to use for your online purchases. To edit your payment profile, select the “Edit” link above your profile information. Updating your payment profile will not change your Digital Wallet profile (see below).



Rheem® Pro Partner REBATES PREPAID CARD

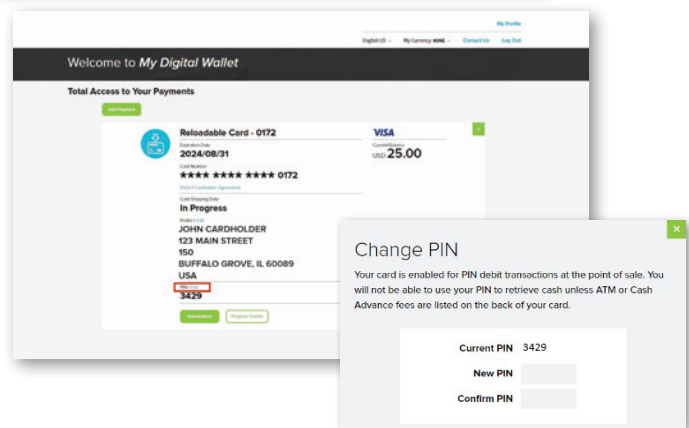
Your Digital Wallet profile consists of your first and last name, mailing address, email, phone number, username, password and security question. Your address and contact info should be updated here and on your MyRheem.com profile, as this is how we will contact you with any updates or notifications for your card account. Here, you can also update your password and security question. Updating this profile will not change the profile associated with the Prepaid Card already in your Digital Wallet. You can update your Digital Wallet profile by clicking “My Profile” in the upper right corner.



View / Change PIN

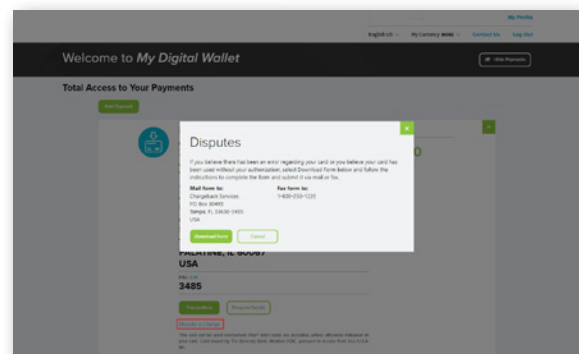
Although it's recommended to complete a transaction as credit, if you would like to place a debit transaction you can locate the PIN associated with your Prepaid Card here. If you would like you can update the PIN at any time. Additionally, you will need your PIN to complete any ATM withdrawals.

To change your PIN, select the “Edit” link above the PIN shown in your Digital Wallet.



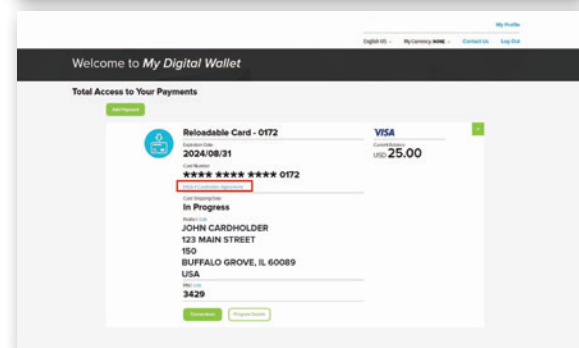
Disputes

If you were to ever notice a fraudulent transaction on your Prepaid Card, please click the Dispute a Charge link under the “Transactions” button to download, complete and send in your dispute form to get your claim started.



Additional Information

If you ever have any question regarding your Prepaid Card, you can access more information by clicking on the “Cardholder Agreement” or “FAQ” links. For additional help with your Prepaid Card, please contact help@myrheem.com.





Pro Partner *Residential KwikComfort* **REBATES**

The below details outline how to set up your payment method for *Residential KwikComfort® Financing* rebates for promotions run through the Contractor Serial Tool (CST) on My.Rheem.com.

Residential KwikComfort® Financing rebate promotions are only available to HVAC Pro Partners.

SYNCHRONY DIRECT DEPOSIT

HVAC Pro Partners participating in promotions with a *Residential KwikComfort Financing* component on the Contractor Serial Tool (CST), will be required to setup their payment method through MyRheem with Synchrony[®] before *KwikComfort* rebate funds can be paid out.

Setting Up Your Direct Deposit Account with Synchrony

When enrolling in the *Residential KwikComfort Financing* Program, you will be required to set up a direct deposit account with Synchrony through your MyRheem account during the application process. This account will be used for your normal funding of sales, as well as your promotional rebate funding.

To update or change this direct deposit account information, you will need to reach out to your Synchrony Inside Sales Representative (sales rep contact list is located on the Residential Financing page under the Marketing menu on My.Rheem.com). You will be required to fill out a change request form and verify banking information.

KWIK COMFORT FINANCING CONTRACTOR ENROLLMENT - STEP 2 OF 4

1 Contractor Profile 2 Banking 3 Terms & Conditions 4 Submit

Complete Banking Information Below

Banking Information:

Routing Number:

Account Number:

Back Next

Funding of Promotional *KwikComfort* Rebates

All claims for *Residential KwikComfort Financing* rebates must be submitted through the CST along with the sales slip submitted to Synchrony to be considered eligible for the rebate promotion, and according to your promotion terms & conditions. Every 15 days, Synchrony will calculate all eligible and approved sales entered through the CST and validate against the sales slips received. **15–30 days after claim approval and processing the *KwikComfort* sale with Synchrony, approved rebates will be totaled and paid out via ACH deposit into each contractor’s business checking account set up with Synchrony, in most cases.**

For additional questions or assistance, please contact help@myrheem.com.



Pro Partner ProClub **REWARDS**

The below details outline how to redeem your points for equipment submitted through the Contractor Serial Tool (CST) on My.Rheem.com.

ProClub Rewards are only available to HVAC Pro Partners.

Pro Partner ProClub REWARDS

HEATING & COOLING

HVAC Pro Partners submitting claims through the Contractor Serial Tool (CST) for promotions will also have the ability to claim ProClub points for eligible equipment.

As long as you are an active HVAC Pro Partner, there is no additional payment method setup required to earn and redeem your ProClub points. Points will automatically be applied for eligible ProClub qualifying equipment when you submit a claim through the CST.

Track & Redeem your ProClub Points

Redeem Your ProClub Points

- Login to My.Rheem.com/ProClub and go to the My Account tab
- Browse reward categories within the online catalog
- Use some or all of earned points on one or more rewards
- Scroll through and select items from the online catalog to redeem your available points
- Click Submit

While some items may arrive in as little as 3-5 business days, order delivery times vary; most products are delivered within 7-10 business days.

Tracking Your Earned Points

You can view your earned point balances and redemptions anytime by clicking the My Account tab on the ProClub website.

Points do not expire for active Pro Partners, unless there is a 12-month period of inactivity on the ProClub account.

Tax Information

All ProClub points are assigned to the individual user (not the business) that submitted the claim through the CST. If you redeem \$600 or more in rewards, you will receive a 1099 from ProClub for tax purposes.