

# CST USER GUIDE HOW TO FILE A CASHBACK CLAIM

Before submitting a CST claim, you must first setup your payment method. Once you have setup either direct deposit or pay card payment method you can proceed to submit claims.

To submit a CST claim select **Marketing** from the top menu, then select "CST Dashboard" from the **Tools** column. Select the **Claim Entry** option to start your submission.

#### ≡ Claim Entry

Submit Claims for CashBack Rebates

#### STEP 1

Fill in the required information:

- Select your company name from the **Contractor** drop-down
- Select the user that the claim will be tied to from the User drop-down
- Input the Install Date for the completed installation
- Select the appropriate rebate from the **Rebate** drop-down

If this is your first time submitting a claim for the current promotion, then you will be prompted to agree to some important information before proceeding to **Step 2**, see the following instructions.

© REGISTER SERIAL NUMBERS TOOL							
1 General	Info 2 Homeowner Info	3 Serial Numbers	4 Confirmation				
<b>General</b> Info Contractor *	AC - Rheem Pro Partner Contractor (Help Desk) ( 🗘	rheem	Q				
User * 😢	(Help Desk), AC - Rheem Pro Partner Contractor 💲						
Install Date *	01/20/2022 (The installation date must be within the last 30 days.)						
Rebate			¢				







#### STEP 1 (CONT.)

If prompted, review the items that need approval or confirmation:

- Agree to the rebate's Terms and Conditions
- Confirm the **Address** is up to date for the contractor company account. Select the **Edit** button to make changes to an existing address or select the **Add** button on the "Add New" address box.
- Confirm the **Email Address** is up to date. If you need to update the email address reach out to the Help Desk for assistance.

All Rebate Submissions Due 30 days December 15, 2021 will be the final d In lenging with its pelloy of continuous progress and improve I agree with above stated Term	from installation ieadline for rebate claim submissions www.Revennesses the right to make changes to this promotion without nutice. is and Conditions
Please verify that the address is correct     Mailing	t.
• Walling     > Cont       1234 Test Drive     Sample, GA 93030       Country : US     • Primary	Click Add to create a new Personal address!
I have verified that the above a	ddress is correct.
<ul> <li>Please verify that the email address is</li> <li>Email: ac-rheem-contractor- user@rheemconnections.com</li> <li>I have verified that the above email address is</li> </ul>	correct. If you need to change your email address, please contact the help desk. s correct.
Next	

Once all items have been agreed to and confirmed you will see them all checked off.



AC - Rheem Contractor (Help Desk) (Sample) has agreed with the Terms and Conditions



 $\checkmark$ 

AC - Rheem Contractor (Help Desk) (Sample) has verified that the following Address is correct

AC - Rheem Contractor (Help Desk) (Sample) has verified that the following **Email Address:** ac-rheem-contractor-user@rheemconnections.com is correct. If you need to change your email address, please contact the help desk







#### STEP 2

Enter the homeowner's information:

- First and Last Name
- Address, City, State and Zip
- Phone Number
- Email Address If the contractor submitting the claim is a Pro Partner and the homeowner email address is added, then a Ratings & Reviews survey will be sent to the customer once the claim has been submitted
- Customer Job Number This field is available to the contractor if they want to associate an internal job number to the claim so that they can cross reference the claims with their company's data

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lom	eowner Info								
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## <u>STEP 3</u>

At the beginning of **Step 3** select the combination that was installed. Based on your selection, the following page will give you the appropriate fields to enter for your serial number(s).

O REGISTER SERIAL NUMBERS T	OOL			
1 v General Info	2 ~ Homeowr	ner Info	Serial Numbers	4 Confirmation
Serial Numbers				
All serial numbers and products entered Please note, your Pro Club points for ser	l below must be for the Homeowr ial numbers entered will calculate	ner installation entered on Step 2 e on an individual basis. The reba	Ite type you select for your rebate c	alculation will not effect Pro Club
point calculation.				
	Now, select th	ne combination that	t was installed.	
		0	Outdoor Unit and	
	Indoor Unit Only	Outdoor Unit Only	Cooling Coil (Optional)	
	Outdoor Unit and Air Handler	Outdoor Unit, Gas Furnace and Cooling Coil (Optional)	Package Unit	
	le Back			





## STEP 3 (CONT.)

Then, enter your serial number(s).

O REGISTER SERIAL NUMBERS T	OOL		
1 v General Info	2 v Homeowner Info	3 Serial Numbers	4 Confirmation
Serial Numbers			
Enter your serial number.			
Outdoor Unit: *			
Air Handler:*			
	⊕ Back Next →		

Select whether or not a thermostat was installed.

- If you select "**Yes**" you will be given a drop-down menu where you will choose what component was installed.
- If you select "No" then you can move to the next page.

1 v Gene	ral Info	2 v Homeowner Info	3 - Serial Numbers	4 Confirmation
		-	-	
Carial Number	_			
Serial Numbers	5 Did you in:	stall a thermostat?		
Serial Numbers	Did you in:	<b>stall a thermostat?</b> EcoNet™ Smart Thermostat	×	





#### STEP 3 (CONT.)

If the install was financed through the *KwikComfort*<sup>®</sup> *Financing* program, select "**Yes**" and a field will appear where you can enter the last 4 digits of the homeowner's account number.

*If you need to know where to find this account number,* hover over the icon to see an image of the Synchrony form you should reference. It will be the Account Number listed at the top of the "Synchrony Bank Sales Slip – B".

The last 4 digits of the homeowner's account number are required to claim a *KwikComfort® Financing* rebate.

the REGISTER SERIAL NUMBERS TOOL	
1    General Info 2  Homeowner Info 3     Serial Numbers  Was this financed through KwikComfort <sup>™</sup> Financing?  *Provide the last 4 digits of your customers cardholders account number.    •	Synchrony Bank Solowie Synchrony Bank Sales Slip - 8 Pypyment Processed at Competition Units and the solowie spectra and the s
Yes     1234     No	
🟵 Back Next 🛞	Softward and a second and a softward

#### STEP 4

On **Step 4** you will be given the chance to review your claim entry and make sure that everything you have entered is correct.

If you need to change anything at all you can use the "**Back**" button to return to the step that you need to make an adjustment on.

#### All claim submissions are final.

Select the "Submit" button once you have confirmed the entry is correct.







## STEP 4 (CONT.)

1 v General Info	2 v Homeowner Info	3	✓ Serial Numbers	4 Confirmation
eview Serial Numbers				
ase review the entered items below bef lect the Back button below to make correc	fore submitting. ctions if you feel this is incorrect pleas	e contact the Help Desk	for further assistance.	
neowner Information				
Install Date: Aug 1, 2021				
Elsa Berry 1234 Demo Drive Sample City, GA 00000 US 000-000-0000				
alcabern 1224@demoaccount.com				
KwikComfort <sup>w</sup> : Submitted Last 4 digits of your customers cardholder	r account number: 1234			
Ensuring r234@defindeccount.com  KwikComfort™: Submitted Last 4 digits of your customers cardholder   YOUR ENTRY HAS QUALIFIE  MODEL	D FOR:	DED ATE		
VOUR ENTRY HAS QUALIFIE  MODEL  Pa16	D FOR:	REBATE	KWIK COMFORT™	PRO CLUB POINTS
KwikComfort <sup>™</sup> : Submitted     Last 4 digits of your customers cardholder     YOUR ENTRY HAS QUALIFIE     MODEL     RA16     RH1T	D FOR:	REBATE	KWIK COMFORT™	PRO CLUB POINTS 500
WikComfort <sup>®</sup> : Submitted Last 4 digits of your customers cardholder  VOUR ENTRY HAS QUALIFIE MODEL RA16 RH1T EcoNet <sup>®</sup> Smart Thermostat	D FOR: SERIAL NUMBER	REBATE ✓ ✓	KWIK COMFORT™ ✓ ✓	PRO CLUB POINTS 500 300 200
Suberry 1234@vetrindeccount.com         KwikComfort™: Submitted         Last 4 digits of your customers cardholder	D FOR: SERIAL NUMBER	REBATE ✓ ✓ ✓ \$50	KWIK COMFORT™ ✓ ✓ ✓ Submitted	PRO CLUB POINTS 500 300 200 1,000
WeikComfort™: Submitted Last 4 digits of your customers cardholder   YOUR ENTRY HAS QUALIFIE  MODEL  RA16 RH1T EcoNet™ Smart Thermostat	D FOR: SERIAL NUMBER	REBATE	KWIK COMFORT™ ✓ ✓ Submitted	PRO CLUB POINTS 500 300 200 1,000
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KwikComfort™: Submitted         Last 4 digits of your customers cardholder <b>YOUR ENTRY HAS QUALIFIE</b> MODEL         RA16         RH1T         EcoNet™ Smart Thermostat	D FOR: SERIAL NUMBER	REBATE	KWIK COMFOR™ ✓ ✓ Submitted	PRO CLUB POINTS 500 300 200 1,000
Submit Alert	D FOR: SERIAL NUMBER	REBATE ✓ ✓ × \$50	KWIK COMFORT™ ✓ ✓ Submitted	PRO CLUB POINTS 500 300 200 1,000
Submit Alert Sysuematics Systematics Syst	P account number: 1234	REBATE	KWIK COMFORT™	PRO CLUB POINTS 500 300 200 1,000





## STEP 4 (CONT.)

Once you submit your claim, the page will reload with a CST # used to reference the submitted claim. You also have the option to either print the claim or send the claim confirmation page to an existing user on your contractor's account.

REGISTER SERIAL NUMBERS TOOL				
1 v General Info	2 v Homeowner Info	3	✓ Serial Numbers	4 Confirmation
ubmitted Serial Numbers				
To view you claim submission and status clict To start a new claim click here.	k here.			
				HVAC
CST# 23287351				
				Print 😝 Email 🕁
Homeowner Information				
1234 Demo Drive Sample City, GA 00000 US 000-000-0000 elsaberry1234@demoaccount.com				
KwikComfort <sup>™</sup> : Submitted Last 4 digits of your customers cardholder	account number: 1234			
♥ YOUR ENTRY HAS BEEN SUB	MITTED FOR:			
MODEL EcoNet™ Smart Thermostat	SERIAL NUMBER	REBATE		PRO CLUB POINTS
RH1T	N/A		~	300
RA16	_	~	~	500
		\$50	Submitted	1,000
KwikComfort • Your claim information has been sent to Ratings & Reviews • If you entered the homeowners email on	Synchrony for the KwikComfort rebat step 2, an email has been sent to the	te validation. em on your behalf to	submit a review for your services.	

