Nexia Diagnostics: New Dealer Game Plan

Use this document to learn, develop, implement, and execute your Nexia Diagnostics Game Plan within your organization.

☐ LEARNING ABOUT NEXIA DIAGNOSTICS

1) Review the Essential Resources
2) Additional Resources

☐ DEVELOPING A NEXIA DIAGNOSTICS STRATEGY

1) How do you want to implement Nexia Diagnostics?
2) Who will have access to Nexia Diagnostics?
3) Who will receive Nexia Diagnostics Customer Alerts VIA email?
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☐ IMPLEMENTING YOUR NEXIA DIAGNOSTICS STRATEGY

1) Set up your Company for Nexia Diagnostics Access
2) Set up your Users for Nexia Diagnostics Access
3) Set up Notification Emails In Nexia Diagnostics
4) Set up Your Team for Success Using the 3 Steps to Diagnostics
5) Set up Your Dealer Code
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☐ EXECUTE YOUR NEXIA DIAGNOSTICS STRATEGY

1) Utilize the Nexia Tear Off Document
2) Prepare for Training Your Team on Nexia Diagnostics
3) Conduct Nexia Diagnostics Training for Your Team
4) Carve Out Time for Your Team to Learn
5) Make Sure Each Team Member is utilizing Nexia Diagnostics

In this section, you and your team can click the links below and learn about Nexia Diagnostics.

1) Review the Essential Resources

- ☐ What is Nexia Diagnostics?
- ☐ Dealer Testimonial
- ☐ Connected Controls
- ☐ Adding a Customer in Nexia Diagnostics

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- ☐ Dealer Remote Configuration
- ☐ Diagnose it!
- ☐ Nexia Diagnostics: Consumer Information
- ☐ Nexia Diagnostics Tear Off Document

2) Additional Resources:

- ☐ With and Without Nexia Diagnostics
- ☐ Nexia Diagnostics 101
- ☐ Nexia Diagnostics Demo Site: Log into ComfortSite > Nexia > Nexia Diagnostics Demo
- ☐ System Information Page
- ☐ RTH Legend Feature
- ☐ Enable Flash (For Dealer Remote Configuration (DRC))
- ☐ Archiving Devices
- ☐ How to Fix [unassigned systems]
- ☐ DRC FAQ

In this section, you will start developing your Nexia Diagnostics Strategy. Use the sections below to work with your team and determine how to utilize Nexia Diagnostics in your business.

1) How do you want to implement Nexia Diagnostics?

Use the following Nexia Diagnostics benefits to brainstorm how you would like to use it in your organization. Be sure to involve your team.

Install Team:

☐ Verify proper configuration on new installations.

☐ Verify system performance on new installations.

☐ Utilize Dealer Remote Configuration to make changes virtually in the Nexia Enabled Control.

Service Team:

☐ Reduce the number of unnecessary truck rolls on warranty calls using Dealer Remote Configuration.

☐ Be proactive to Service Alerts instead of reactive to customer Calls.

☐ Use Alert Mapping to enhance my Dispatch operations.

☐ Enhance my current Service Agreements by offering a Connected Service Agreement.

☐ Allow my Field Technicians to see 30 days of runtime history to diagnose systems using Diagnostics.

Sales Team:

☐ Differentiate our company and close more sales at the kitchen table. Diagnostics helps our company stay proactive to Service Alerts rather than reactive to customer phone calls.

☐ On sales calls, use Nexia Diagnostics data to highlight the comfort difference between a Variable Speed Communicating System and a Single Stage System (3rd Party Data).

☐ Offer a Nexia Enabled Control on “older” systems to allow my sales team to use the 30 Day Runtime History data to address comfort concerns in a customer’s home.

2) Who will have access to Nexia Diagnostics?

Fill in the roles below. If someone has multiple roles in your organization, feel free to leave the other roles blank.

If you assign a person to have Diagnostics Access that does not have ComfortSite, you will need to create an account for them. Leave the ComfortSite User Name blank until you reach the "Implementing the Strategy" segment in this game plan.

Role:	Name:	ComfortSite User Name:	Diagnostics Access: *Recommendations in Bold*
☐ Operations Manager:			☐ **Full Access*** ☐ Read Only**
☐ Service Manager:			☐ **Full Access*** ☐ Read Only**
☐ Install Manager:			☐ **Full Access*** ☐ Read Only**
☐ Customer Service:			☐ **Full Access*** ☐ Read Only**
☐ Customer Service:			☐ **Full Access*** ☐ Read Only**
☐ Dispatcher:			☐ **Full Access*** ☐ Read Only**
☐ Dispatcher:			☐ **Full Access*** ☐ Read Only**
☐ Office Admin:			☐ **Full Access*** ☐ Read Only**
☐ Owner:			☐ **Full Access*** ☐ Read Only**
☐ Comfort Consultant:			☐ Full Access* ☐ Read Only**
☐ Comfort Consultant:			☐ Full Access* ☐ Read Only**
☐ Comfort Consultant:			☐ Full Access* ☐ Read Only**
☐ Quality Control Technician:			☐ **Full Access*** ☐ Read Only**
☐ Service Technician:			☐ Full Access* ☐ **Read Only****
☐ Service Technician:			☐ Full Access* ☐ **Read Only****
☐ Service Technician:			☐ Full Access* ☐ **Read Only****
☐ Service Technician:			☐ Full Access* ☐ **Read Only****
☐ Service Technician:			☐ Full Access* ☐ **Read Only****
☐ Other:			☐ **Full Access*** ☐ **Read Only****
☐ Other:			☐ **Full Access*** ☐ **Read Only****

** Full Access: This user will be able to add, remove, and edit customers in Nexia Diagnostics (Nexia.Dealer)*

*** Read Only: This user will only be able to view Diagnostics data (Nexia.Technician)*

3) Who will receive Nexia Diagnostics Customer Alerts VIA email?

Name:	**Email:**	**Alert Types:**
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***
		☐ Critical Alerts* ☐ Major Alerts** ☐ Normal Alerts***

** Critical Alerts: Loss of heating/cooling operation*

*** Major Alerts: Reduced functionality – minimum operation is possible*

**** Normal Alerts: Functionality may be lost but should recover or the information is for diagnostics purposes / performance monitoring*

4) Who will enroll new Nexia Enabled Controls into Diagnostics?

This is a VERY important step. *Without someone responsible for adding the customer into Nexia Dealer Diagnostics, this will get overlooked!*

Think: Office admin or Sales Coordinator that registers warranties? Install or Service Manager?

Role:	**Name:**	**ComfortSite User Name:**	**Diagnostics Access:**
☐ Diagnostics Coordinator:			☐ **Full Access (REQUIRED)**

Now that your team has developed your Nexia Diagnostics strategy, it's time to start putting items in order so you can execute. First, use the sections below to set up your company for success.

1) Set up your company for Nexia Diagnostics Access

☐ Log in to ComfortSite as an Admin (anyone who has Admin privileges in ComfortSite).

☐ Create a NEW Admin profile.

Admin Center > Company Administration > Manage My Users > add new user
This account will have all the privileges to ComfortSite and is required to assign Security Groups in ComfortSite. This account does not need to be assigned to anyone and can be used to add new users to ComfortSite and grant Security Group Access.

Please note: This profile MUST have BOTH Nexia Diagnostics Security Groups (Nexia.Dealer & Nexia.Technician) assigned to them in order to set up other users and grant Security Permissions. When Nexia.Dealer & Nexia.Technician are both assigned to a user, it will automatically default to the Nexia.Technician view which is the "read only" view of Diagnostic. This should NOT be the account assigned to the Diagnostics Coordinator or anyone who needs Full Access to Diagnostics.

☐ Send an email to the ComfortSite team and ask for the Nexia.Dealer and Nexia.Technician permission to be added to the new company admin account (the one you set up in the previous step). Copy and paste the text below and fill in the blanks:

To: support@comfortsite.com
Subject: ComfortSite Nexia Diagnostics Security Groups
Body: Hello, my name is (Name) with (Company). Please add the following Security Groups to ComfortSite User ID (Enter New Admin User ID)
Nexia.Dealer and **Nexia.Technician**
Once this is completed, can you send me confirmation?
Thank you,

2) Set up your Users for Nexia Diagnostics Access

☐ Once confirmation is received from ComfortSite Support, log in to ComfortSite as the new Admin.

Use the list created in Step 2 of DEVELOPING A STRATEGY to create or edit users for Nexia Diagnostics access.

Create New User: Admin Center > Company Administration > Manage My Users > add new user
Edit Existing User: Admin Center > Company Administration > Manage My Users > edit

☐ Fill in/Update all the applicable fields. Assign User to Security Groups:

Full Access: Nexia.Dealer
Read Only: Nexia.Technician

Please note: Only add ONE of the two Security Groups listed above to each user. If both Security Groups are added, it will default to the "Read Only" view of Diagnostics.

3) Set up Notification Emails In Nexia Diagnostics

☐ Log in to Nexia Diagnostics through ComfortSite.

ComfortSite > Nexia > Nexia Diagnostics
The first time each user logs into Nexia Diagnostics, they will have to read through and acknowledge the Terms and Conditions.

Click the NOTIFICATIONS tab in Nexia Diagnostics.

☐ Use the list created in Step 3 of DEVELOPING A STRATEGY to “+ ADD RECIPIENT” to Nexia Diagnostics.

Click “+ ADD RECIPIENT”

Fill in the “Name*” and “Email*” for each user listed in Step 3 of DEVELOPING A STRATEGY
Follow the specified Alert Types for each user in Step 3 of DEVELOPING A STRATEGY

Click “SAVE”

Repeat for all names listed in Step 3 of DEVELOPING A STRATEGY

Please note: Only users with Nexia.Dealer access will be able to view and change the notification emails.

4) Set up Your Team for Success Using the 3 Steps to Diagnostics

☐ Review the 3 Steps to Diagnostics.

In order to take full advantage of Nexia Diagnostics in your organization, your team must follow all 3 Steps to Diagnostics. Be sure your team is prepared to follow these steps:

1) **Install and Connect:** It is important for your technician to connect the Nexia Enabled Trane Connected Control to the internet as part of the installation process. This is very important for Nexia Diagnostics, but is also critical for the connected control to receive firmware updates.
2) **+ Add Device in Nexia:** The customer must create an account on MyNexia.com OR download the Nexia app, and create an account. Then the technician can assist the homeowner to “+ Add Devices” into Nexia.
3) **Add Customer to Nexia Diagnostics:** With the AUID # or serial # in hand, the Diagnostics Coordinator can “+ ADD CUSTOMER” to Nexia Diagnostics. This step takes 30 seconds and should be done at the time of the warranty registration.

Is your team struggling to complete steps 1 & 2? Check out the Nexia Tear Off Document. This document is designed to help with just that.

5) Set up Your Dealer Code

☐ Make sure your Dealer Code is ready to be input into the Nexia Enabled Trane Connected Control

Your Dealer Code is the 10 digit phone number found in ComfortSite without any "." or "-". You can also verify your Dealer Code in Nexia Diagnostics. Log in to Nexia Diagnostics. In the top right corner of the webpage, you will see your company name and Dealer Code. This Dealer Code is used at the time of install. Your Install Technician will be prompted to "Enter the Dealer Code" into the Nexia Enabled Trane Control during setup (only on XL824, XL850, XL950, and XL1050).

For reference, write down your confirmed Dealer Code here: Click or tap here to enter text.

1) **Dealer Logo:** Upload your Dealer logo in ComfortSite (file must be under 25MB).
   Log into ComfortSite > Nexia > Dealer Logo Management
2) **Contact Information:** Verify your contact information is correct in ComfortSite (must log in to ComfortSite as an Admin).
   Log in to ComfortSite > Admin Center > Company Administration > Update Company Information
   Please note: If Contact information needs to be edited, contact your Territory Manager. They will need to have the ComfortSite admin make changes.

6) Establish a Process

☐ Add a step in your installation checklist to require the bottom half of the Nexia Tear Off Document to be filled out by your Installation Technician.

Once this document is filled out, determine where you want the Technician to send it.

☐ Add a step to your installation checklist to add NEW Nexia Enabled Controls into Nexia Diagnostics.

Arguably, this is the most important step to the entire process. Without the customer being added to Nexia Diagnostics, there is no way to see the rich data Nexia Diagnostics provides to you and your team. Take the time to make sure your team knows how important this is. Adding a customer takes less than 30 seconds. Have your Diagnostics Coordinator review and understand Adding a Customer in Nexia Diagnostics.

Now that you and you team have developed your Nexia Diagnostics Strategy, it's time to put that plan into action. Use the sections below to execute your well-developed strategy.

1) Utilize the Nexia Tear Off Document

☐ Review the Nexia Tear Off Document

The secret to getting your customer's Nexia Enabled Control connected to the internet and Nexia without wasting too much of your Install Technician's time is to ask the homeowner for the Wi-Fi password and to create a Nexia account BEFORE setting up the control. This will provide ample time for the homeowner to find the Wi-Fi password and create a Nexia account before it is needed.

Use the top section of the Nexia Tear Off Document to aid the homeowner in this process. The bottom section of the document is for your Installation Technician to capture the crucial information needed for your Diagnostics Coordinator to add the system to Nexia Diagnostics. This will be utilized in the next step.

2) Prepare for Training Your Team on Nexia Diagnostics

☐ Add a Nexia Enabled Control to Nexia Diagnostics for training.

If you have a Nexia Enabled Control in your office, fantastic. Use this control as your own demo for your future trainings. If you do not have a Nexia Enabled Control to demo, connect with your Territory Manager, as this is a great tool for training your team. Add the Control to Nexia Diagnostics by following the 3 Steps to Diagnostics found in the previous section.

☐ Set up a Date and Time to train all new users on Nexia Diagnostics.

Date: Time:

3) Conduct Nexia Diagnostics Training for Your Team

☐ Use the resources found in the LEARNING section of this Game Plan to conduct your training.

Use the Testimonial and training videos and documents provided. Invite your Territory Manager to assist with the training.

☐ Train your Installation and Service Technicians are using the Dealer Code on EVERY Nexia Enabled Trane Connected Control.

☐ Use the Nexia Diagnostics Demo Account for *Training.*

Log into ComfortSite > Nexia > Nexia Diagnostics Demo
At this point, you may not have many customers in Nexia Diagnostics. No worries! We have you covered. Use the Nexia Diagnostics Demo Account.

This Demo Account will allow you and your team to learn more about Nexia Diagnostics through numerous systems that have been set up on the demo account. Bring up the Demo Account during the training, walk through Nexia Diagnostics, and discover it together.

4) Carve Out Time for Your Team to Learn

☐ Utilize the following curriculum to allow your team to learn Nexia Diagnostics on their own

What is Nexia Diagnostics? Video

Nexia Diagnostics 101 Video

Trane Connected Controls Video

System Information Page Video

RTH Legend Feature Video

Dealer Remote Configuration Video

☐ Use the Nexia Diagnostics Demo Account for *Learning.*

Using Nexia Diagnostics is like learning how to ride a bike. Someone can tell you how to ride a bike, but you need to experience it multiple times before you get good at it. Set up time for each Nexia Diagnostics user to access and click through the Demo Account. Have them explore the Dashboard page and get to know how it works. Use the Nexia Diagnostics Demo Questions document to quiz your team.

Make sure they navigate the Customer page and see how each customer is listed. Be sure they click on a customer and digest the real-time data they can see. Just like riding a bike, it requires practice to get good at using it!

5) Make Sure Each Team Member is utilizing Nexia Diagnostics

☐ **Comfort Consultant**

- Develop your Nexia Diagnostics story to allow your Comfort Consultant to build value into the company and close more sales.
- Want to sell more XV systems? Find a Variable Speed System in your company to show off the Runtime History Data on a Communicating System. Allow the customer to see the 3rd party data of Diagnostics and admire the consistency of temperature and humidity.
- Use Nexia Diagnostics as a sales tool.

  Allow your technicians to install a Trane Connected Control on an older system. When it comes time for the customer to replace the system, have your Comfort Consultants use the Nexia Diagnostics data to address comforts concerns in the customer's home. *Humidity? Hot and Cold spots in the home? Equipment sizing? Increased runtimes? Visibly deteriorating performance?*

  Consider putting together a program to incentivize both the technician and the homeowner to install the Trane Connected Control in their home on older systems. *15+ years old*? Be sure to have your technicians input the Dealer Code to make sure the homeowner knows which dealer to call when it's time for their system to be replaced.

☐ **Service Technician**

- Use Nexia Diagnostics Data to help Diagnose a system.
- Use the Runtime History Graph to diagnose "ghost" issues. See what a system was doing when the customer called with the complaint.

☐ **Quality Control Technician**

- Verify system performance
- Show customer performance data to give them peace of mind

☐ **Customer Service Representative**

- Be proactive to system alerts instead of reactive to customer calls
- Check Dashboard actively for customer alerts
- Set up their email to receive alerts as they occur
- Use Runtime History Data to verify performance history with a customer

☐ **Install Manager**

- Verify new install was done correctly
- Verify system is connected to Wi-Fi, Nexia, and Diagnostics
- Verify system configuration (system is setup correctly) *Single Stage? Heat pump? Heat Source?*
- Verify system status
- Verify firmware is current
- Verify performance using Runtime History Data
- Use Dealer Remote Configuration to access the Connected Control, if a configuration adjustment is needed

☐ **Service Manager**

- Monitor problem systems – pin customers to Dashboard Page
- Pull up customer in Nexia Diagnostics to “run through” issue with technician in the field
- Use Dealer Remote Configuration to access customer’s control remotely to address issue or to help customer

☐ **Dispatcher**

- Utilize Dashboard to see when alerts pop up: proactive vs. reactive
- Send AUID # to technician to use Nexia Diagnostics while on the service call