



Sales Plan: – Ecoer New Contractor Incentive Plan

Objective: To incentivize new HVAC contracting businesses to install Ecoer Intelligent Heating and Cooling Systems while also encouraging the utilization of the Ecoer Smart Service Contractor App (ESS) so the contractor can enjoy the benefits of using the ESS Pro app during the installation.

Award: Ecoer will award up to \$1,500 in Visa Gift cards to a participating HVAC contracting business for installing up to three qualifying Ecoer systems.

1st Install	\$400
2nd Install	\$500
3rd Install	\$600

New contractors that install one qualifying system can earn \$400.

New contractors that install two qualifying systems can earn \$900.

New contractors that install three qualifying systems can earn \$1500.

Target Audience: HVAC contracting businesses who are licensed and/or authorized to buy Ecoer equipment from their local Ecoer distributor. This program is for contractors who have never installed an Ecoer unit or system.

Effective Date: Systems must be purchased, and final installation (aka start up) must be completed between 2/20/24 to 5/30/24 to qualify under this program.

Qualifying Systems:

A complete Ecoer system as defined in the below charts must be purchased and installed to qualify as a complete system.

Qualifying Top Discharge Systems: (Gen 1 or Gen 2)

Outdoor Unit	+	Air Handler	OR	Furnace / COIL	+	Qualifying Gateway	+	Thermostat
EODAH18-A or B		EAHTN		MGH96M / GNC Coil		EG910L		EST01 or EST02

Training:

Ecoer offers various levels of installation training including both in-person and online training classes for installers. New installers should, at a minimum, complete the installation track on our Ecoer Hero Training Academy which is an online self-paced training center located under 'menu' of our website; or visit directly at www.ecoer.com/heroacademy/. The installation training track covers 3 modules: 1) Residential Heat Pumps 2) IoT Gateway System and 3) Smart Service Mobile App. Completing this track takes about 2 hours.

Utilization of the Ecoer Smart Service Pro App:

Installers must utilize the below features of the Ecoer Smart Service Pro App (ESS Pro Contractor App) during the installation process:

- 1) Dealer owner / Service Manager must create an Account Profile on the app before attempting the installation.
- 2) Add Unit to contractor's portfolio.
- 3) Complete warranty registration process using installer's smart phone camera to scan QR and Bar codes.
 - a. Please note, a separate one-time enrollment is required for labor warranty with Trinity Warranty. See your sales associate for details.
- 4) Complete homeowner agreement on app.
- 5) Follow along with Auto-charge feature on the app. (Auto-charge sequence must be activated at the board using the BS4 button)

Examples:

Example A: Bobby's AC and Heat installs one qualifying system within the effective dates. It's their fifth Ecoer system ever installed but this is the only installation within the effective period. Bobby's AC would NOT be eligible for this sales plan because they had installed Ecoer systems before the effective period. However, their installation can count towards incentives available in the 2024 Ecoer Dealer Loyalty Program once they have completed enrollment for that program. For current Ecoer contractors, visit with your Sales Associate to learn more about the 2024 Ecoer Dealer Loyalty Program for complete details.



Example B: Big Moe's Heating and Air installs two qualifying Ecoer systems within the effective period. The first installation was on 3/4/24 and was their first ever Ecoer installation. Big Moe's Heating and Air also installed another qualifying Ecoer system on 4/14/24. On 6/14, the owner of Big Moe's AC emails in the installation claim paperwork with both installations on the form and a signed W9. Within 48 hours of sending in the claim form, Moe, the owner of Big Moe's, received an email to confirm the receipt of the claim. Two weeks later Moe received \$900 in Visa Gift card in his email closing out his claim. (\$400 for installation one and \$500 for installation two). If Big Moe would have waited to claim the incentive after the deadline of 6/15/24 then his claim would have been ineligible.

Example C: Cold Chill AC company installs three qualifying systems within the effective period. This was the first time they had ever installed an Ecoer system. Cold Chill AC submitted their claim form and W9 after their third installation on 3/15/24. After Ecoer verified the installations qualified under this program the Visa Gift cards totaling \$1500 were emailed to the recipient listed on the claim form. (\$400 for the first installation, \$500 for the second and \$600 for the third)

Special Note: The contractor company does NOT have to wait to complete all three installations before a claim is sent to Ecoer for payment. The contractor could send in a claim for every installation following the completion of each installation. As long as the claim form and signed W9 are submitted before 6/15/24 then the claim is eligible.

Combining Programs:

New contractors of Ecoer who would like to continue to install Ecoer products beyond this sales plan are encouraged to participate in our 2024 Ecoer Dealer Loyalty Program. The Ecoer Dealer Loyalty Program provides even more incentives for completing Ecoer installs. A contractor's first 3 installations under the New Contractor Incentive Sales Plan WILL count towards the 2024 Dealer Loyalty Program. Enrollment and training are required for contractors wishing to become an Ecoer dealer and to participate in the 2024 Ecoer Dealer Loyalty Program. Ask your local salesperson for more details on becoming an Ecoer dealer and participating in the 2024 Ecoer Dealer Loyalty Program.

No other sales plans or discount programs can be combined with the Ecoer New Contractor Incentive Sales Plan.



Receiving Gift Cards:

The company representative indicated on the claim form will receive the Visa gift card electronically by email through a 3rd party service. Contractors who receive incentives as a result of this program in excess of \$600 will receive a 1099 tax form from Ecoer and the recipient will be responsible for any tax obligations owed as a result of his/her acceptance of any incentive benefit.

Claims:

No pre-enrollment is required for the New Contractor Incentive Plan. To request earned Visa Gift Cards, contractors must fill out and submit the claim form by email to Programs@Ecoer.com on or before 6/15/24 and include a completed W9. After emailing the form, please allow 48 hours for verification and confirmation. Once the claim is confirmed your Visa Gift Card will be emailed to you within 30 days.

Claim Form:

Dealer / Installer Company Name:	
Company Representative:	
Email to send Visa gift card to:	
Installation #1, last 6 digits of serial # of Gateway	
Installation #2, last 6 digits of serial # of Gateway	
Installation #3, last 6 digits of serial # of Gateway	

Note: Please include IRS form W9 if the contractor is claiming two or more installations per the IRS guidelines.