Trane MAP™ Configuration Instructions

Purpose: The purpose of this document is to provide instructions on how to:

1. Configure Google Gmail accounts to work with the Trane MAP™ application
2. Setup Gmail and Microsoft Exchange email, calendars, and contact lists on the iPad
3. Setup the Trane MAP™ application to use Gmail and Microsoft Exchange calendars and contact lists
4. How to schedule appointments to show up as engagements in the Trane MAP™ application

Not Covered: Configuration of Microsoft Exchange email accounts, calendars, and contact lists. Please contact your local IT support team for assistance with creating Microsoft Exchange email accounts.

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Gmail Setup Instructions

Step 1 - Create a Gmail Account
1. Set up a Gmail account, which includes an email account, contact list, and online calendar. You can set up a Gmail account here: https://accounts.google.com/newaccount

Step 2 - Setup Gmail Calendar
1. From your Gmail home screen, Select Calendar

2. If this is the first time setting up Google calendar for this account, Verify the correct Time Zone is selected and click Continue.

3. Select Calendar Setting widget in upper right corner of screen and select Calendar Settings
4. Go to the **General** tab on Calendar Settings

![Calendar Settings General Tab](image)

5. Verify your correct time zone and any other setting you would like to set and click **Save**. If you saved settings, you will need to select Calendar settings from the widget again before proceeding to the next step.

![Current Time Zone](image)

6. Go to the **Calendars** tab on Calendar Settings

![Calendar Settings Calendars Tab](image)

7. Select **Notifications**

![Calendar Settings Notifications](image)

8. Verify that email notifications of New events, changed event, and cancelled events are checked

![Calendar Notifications](image)
9. Click on **Save**

![Image of calendar with Save button highlighted]

10. Close Calendar Settings and your calendar - Calendar settings are now complete

### Step 3 - Setup Gmail Contact List

#### Contact List Notes
- You have the option of either sharing a single calendar and contact list for all of your Retail Sales Professionals or individual calendars and contact lists for each Retail Sales Professional.
- If you decide to share one calendar/contact list for all Retail Sales Professionals, you must enter each Retail Sales Professional in the contact list.
- If you will use individual calendars and contact lists for each Retail Sales Professional, you must enter that Retail Sales Professional in the contact list.
- The Retail Sales Professional email address that is entered in the contact list **MUST** exactly match the email address entered in Trane MAP™ application Settings module, or calendar entries will not be displayed in the Trane MAP™ Clients module.

1. From your Gmail home screen, select **Contacts**

![Image of Gmail home screen with Contacts highlighted]

2. Click on the **New Contact** button

![Image of Gmail Contacts page with New Contact button highlighted]
3. Enter the Retail Sales Professional name and email address in the contact list. For a Retail Sales Professional, the only required contact information is name and email address.

4. After entering the Retail Sales Professional’s information on the New Contact screen, click on My Contacts and verify that the Retail Sales Professional is listed in the contact list.

5. Retail Sales Professional Contact List setup is complete.
Step 4 – Scheduling an Appointment

Scheduling Appointment Notes

- For a client to show up as an engagement in the Clients module of the application, they need to be defined in the contact list and there needs to be a calendar entry for the appointment.
- The information from the contact list that will be displayed in the Trane MAP™ Clients module is:
  - Client name
  - Phone numbers
  - Home address
  - Email
- To define a “bill-to” address that is different than the job site address, enter the bill-to address as the work address in the contact list.
- When scheduling the appointment, invite both the Retail Sales Professional and client to the appointment.
- In order for the client’s name to appear in the Trane MAP™ Client module, only invite the Retail Sales Professional and client to the appointment.

1. In Gmail Contact list, enter a contact
2. Go to Gmail calendar

3. Click the **Create** button to create a new calendar event

4. Enter the appointments **title**, **time**, **location**, and **description**.
5. Under Add Guests, Select the contact the Retail Sales Professional will meet with. Once you start typing characters in the field, it will look up contacts in the contact list. Select the home owner that was entered in the contact list.

![Contact Selection]

6. After selecting the contact, the guest list should contain the name of the Retail Sales Professional and the client.

![Guest List]

7. Click the SAVE button
8. You will be prompted to send invitations. If you want to send an invite to the client, click the **Send** button. Otherwise, click the **Don't Send** button.

9. You should see the calendar entry on the Gmail calendar. You are done setting up the appointment.
iPad Gmail Setup

iPad Gmail Setup Notes

- Only use this section if you are going to use Gmail email, calendar, and contact list on your iPad

Step 1 - Getting Started

1. Open the Settings application on your iPad

2. Open Mail, Contact, Calendars

3. Press Add Account

4. Select Microsoft Exchange - NOT Gmail.
Step 2 – Enter Account Information

1. In the Email field, enter your full Google Account email address. If you use an @googlemail.com address, you may see an "Unable to verify certificate" warning when you proceed to the next step.
2. Leave the Domain field blank.
3. Enter your full Google Account email address as the Username.
4. Enter your Google Account password as the Password.
5. Enter the Retail Sales Professional Name as the Description, and tap Next.

6. When the new Server field appears, enter m.google.com.
7. Press Next at the top of the screen
Step 3 – Enable Mail, Contacts, and Calendars

1. Verify Mail, Contacts, and Calendars are all turned on.

2. If not, turn all three on and click **Save**.
3. Unless you want to delete all the existing Contacts and Calendars on your iPad, select the **Keep on my iPad** option if prompted. This will also allow you to keep syncing with your computer via iTunes.
4. You should now see your Gmail account listed on the iPad.
iPad Microsoft Exchange Email Setup

iPad Microsoft Exchange Setup Notes

- Only use this section if you are going to use Microsoft Exchange email, calendar, and contact list on your iPad
- Talk to your Exchange support person/administrator for setting to use in this section

Step 1 - Getting Started

1. Open the Settings application on your iPad

2. Open Mail, Contact, Calendars

3. Press Add Account

4. Select Microsoft Exchange
Step 2 – Enter Account Information

1. In the Email field, enter your full Exchange Account email address.
2. Enter Domain if specified by your Exchange administrator otherwise leave the Domain field blank.
3. Enter your Exchange Account name as the Username.
4. Enter your Exchange password as the Password.
5. Enter the Retail Sales Professional’s Name as the Description.

6. Press Next at the top of your screen again.
7. Enter the server information provided by your Exchange administrator and press Next.

8. If you receive an Unable to Verify Certificate dialog box, contact your Exchange administrator to troubleshoot the issue.
9. Press Next at the top of the screen again.
Step 3 – Enable Mail, Contacts, and Calendars

1. Verify Mail, Contacts, and Calendars are all turned on.

2. Unless you want to delete all the existing Contacts and Calendars on your iPad, select the **Keep on my iPad** option if prompted. This will also allow you to keep syncing with your computer via iTunes.

3. You should now see your Exchange account listed on the iPad.
iPad Contact List Sync Verification

1. Open Contacts on the iPad

2. Press on the red Groups ribbon on the top left of the page

3. Verify the contact list you defined is listed as a contact group
4. Select the **Contacts** associated with the email address setup and verify any contacts you have added are listed.

5. If you are not seeing contacts, wait a few minutes for the iPad to sync.
6. If after a few minutes you are still not seeing the contacts, verify that the iPad email configuration steps were performed correctly.
7. If after verifying the configuration was performed correctly and you still are not seeing the contacts, contact your Trane MAP™ support point person for troubleshooting.
iPad Calendar Sync Verification

1. Open Calendar on the iPad

2. Press on the Calendars button

3. Select the calendar associated with the Retail Sales Professional’s email address. Exchange calendars will be titled Calendar.
4. Verify the appointments from the Retail Sales Professional’s calendar are displaying.

8. If you are not seeing calendar entries, wait a few minutes for the iPad to sync.
9. If after a few minutes you are still not seeing the calendar entries, verify that the iPad email configuration steps were performed correctly.
10. If after verifying the configuration was performed correctly and you still are not seeing the calendar entries, contact your Trane MAP™ support point person for troubleshooting.
Trane MAP™ Email/Calendar/Contact Setup

**Trane MAP™ setup Notes**
- Refer to Trane MAP™ user guide for more details on configuration and setup of the Trane MAP™ application on the Comfort Specialist page at [www.ComfortSite.com](http://www.ComfortSite.com). The Trane MAP™ User’s Guide can be found under Program Documents.

**Step 1 – Trane MAP™ Email/Calendar Configuration**
1. Open the Trane MAP™ application

2. Enter your ComfortSite™ ID and password and press Login
3. Select **Resources** menu option
4. Select **Settings**
5. Enter the **Retail Sales Professional email address** that was configured on the iPad. The Retail Sales Professional email address that is entered in the contact list **MUST** exactly match the email address entered in Trane MAP™ application Settings module, or calendar entries will not be displayed in the Clients module.

6. Select the **Calendar** associated with the Retail Sales Professional’s email
Step 2 – Trane MAP™ Calendar Sync Verification

1. Select the Main Menu option
2. Select Clients

3. Select View Engagements
4. Press the refresh **Chasing Arrows** button at bottom of the engagement window.

6. Verify that appointments from calendar are displaying.

7. If you are not seeing appointments, wait a few minutes for the application to sync.

8. If after a few minutes you are still not seeing the appointments, contact your Trane MAP™ support point person for troubleshooting.

9. Email, contact list, calendar configuration is complete.