

# PIC Training



**Universal HVAC/R  
Parts and Supplies**

# Agenda

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- Introductions – 5 min
- PIC Summary & Training Resources – 5 min
- Recent Enhancements & Updates – 20 min
- Demo / Q&A – 10 min



**Universal HVAC/R  
Parts and Supplies**

# Introductions

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**Fabian  
Salinas**

**Engineering  
Manager –  
Applied /  
Nuclear  
Products**



**Jeff  
Russ**

**Engineering  
Manager –  
Unitary  
Products**



**Trevor  
MacPherson**

**Engineering  
Manager –  
Residential  
Products**



**Daniel  
Koster**

**Engineering  
Manager –  
Team  
Lead/Project  
Manager**

# Training Resources

- User Manual – PIC Dashboard
- Training Videos – PIC Dashboard
- PIC Online Training Module & Webinars – HVACPartners>Learning>Training Portals & Guides>Parts Training>System Tools Training Videos

Dashboard

New & modified models in last 30 days  
**1.3K**

New parts added in last 30 days  
**1.1K**

Model Number/Name  Part Number/Name  Serial Number

Please enter a model number prefix value min. 4 characters. Use '%' or '-' for wildcard search

**Notification**

- The PIC User Manual has been updated to include the newly released features in the Parts Information Catalog (PIC) on September 21st. To access, please click on the "PIC User Manual" link below.

[PIC User Manual](#) [Website and Data Support Request](#) [Training Videos](#) [RC Community](#) [Abbreviations List](#)

HVAC PARTNERS All Brands

Products Marketing Support Learning Ordering Program Search (Beta) Edit Eligibility Criteria (Beta) Create Eligibility Criteria

Learning Menu:

- Training Portals & Guides
- Tests/Certifications
- My Learning Center
- Carrier University
- ICP University (Commercial)
- Ductless & VRF Training
- Parts Training
- Controls Expert Training Portal

RC Online Training

Systems Tools Training Videos

Training Catalog

# Recent Enhancements & Updates



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# General Updates

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## Major Data Cleanup

- Staged to Online Sync - **Completed**
- Fixes via Cataloging Process – **Completed**
- Description Field vs Note Field – **In Progress**
- Bad parts/models – **In Progress**
- Verification/Validation of processes – **In Progress**

**Total BOMs -> 436,139**

**Total BOM Lines -> 28,576,235**

**Total Parts -> 555,808**

**Total Supersessions -> 103,933**



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## Recent Fixes

- Where Used Logic
- Supersessions Not Showing
- Reverse wild card/Search enhancements

## Upcoming Updates

- Development of new Critical Parts Tool
- UI Upgrades
  - Will be reviewing every aspect of the site and exploring User Interface upgrades
- Potential Alternate Part feature
- Supersession Report – i.e. supersessions added in last 30 days

# Catalog Outlook

## Residential

- Reviewing catalogs in last 12 months to review for accuracy. i.e. inconsistencies found with 2023 furnaces.
- DLS
  - Adding coils & other NSS parts back to catalogs
  - Legacy BOM Cleanup
- Legacy Catalogs
  - Similarly to the commercial team we are reviewing older catalogs that need to be re-cataloged to improve the BOMs.

## Commercial

- Loading Applied Models
  - 30 Series (In process)
  - 19 Series (In process)
  - V Series ART
  - K Series ART
- LCML
  - SMRT
  - SPLITS
  - Loading Legacy Unique Models

## Overall

- Supersessions
  - Over 2800 supersessions put into the system to cover from March 2023 to August 2024
  - 13,400 supersession to review and enter
- Part Statuses
  - 65,000+ Obsolete parts
  - 30,000+ superseded parts
- Total Models
  - 2022 ~ 120,000
  - Today ~ 436,000
  - ~12,500 a month

**TOTALINE**

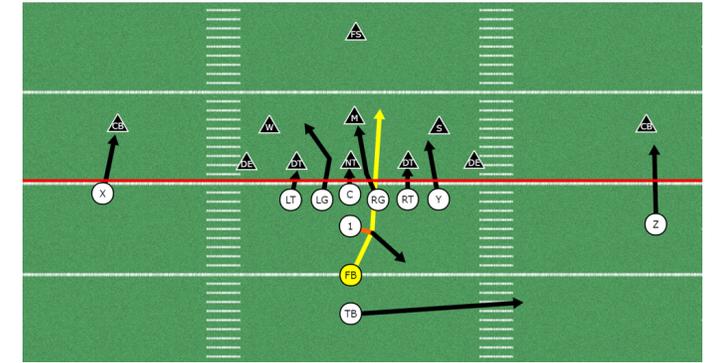
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# Current Cataloging Practices

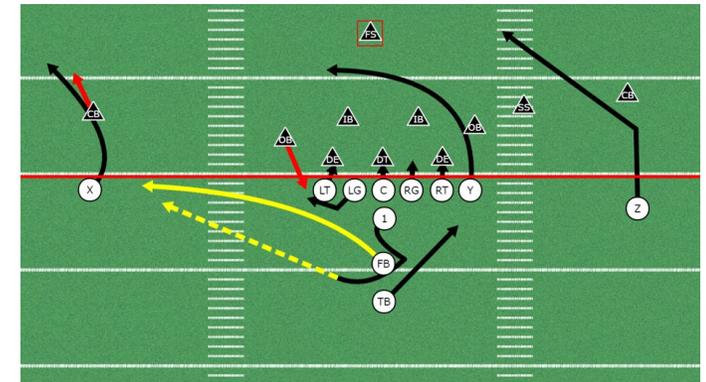
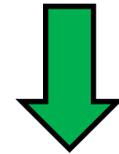
- Since switching to PIC, the system has opened up the 'playbook' for cataloging
- **EPIC/EPMS**
  - 'Flat' Bills of Material / No actual linked structure
  - Limited model character length
- **PIC**
  - Common structures
  - Unlimited model character length
  - Flexibility on unique structures



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19XR-FR#3 XF CMP



19XR-1212247JCH64--0222Q28901

# Cataloging Practices Continued

## Model + Serial BOMs

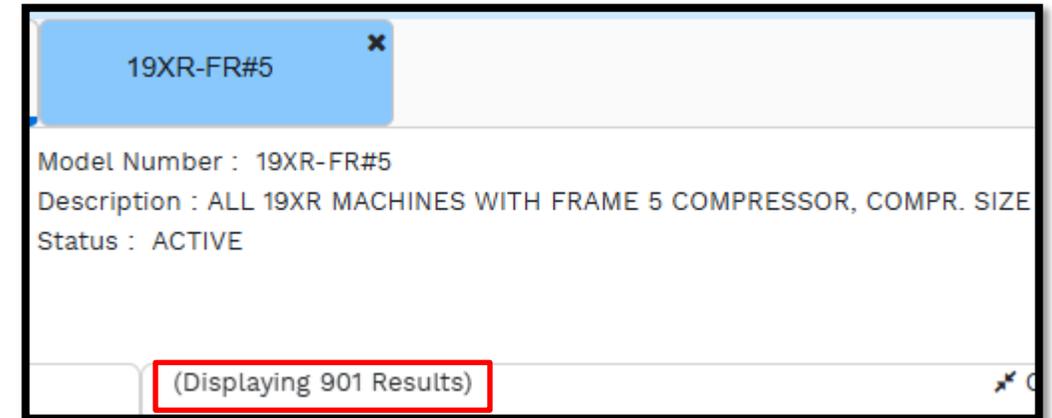
- These BOMs are used when the BOM of the same model number can vary between serial numbers.

## Examples:

- 19XR-1517276BHH61--2812Q21941
- 19XR-1517276BHH61--2912Q21953
- 50PSH007BCC3ACCY-0416V

## Benefits

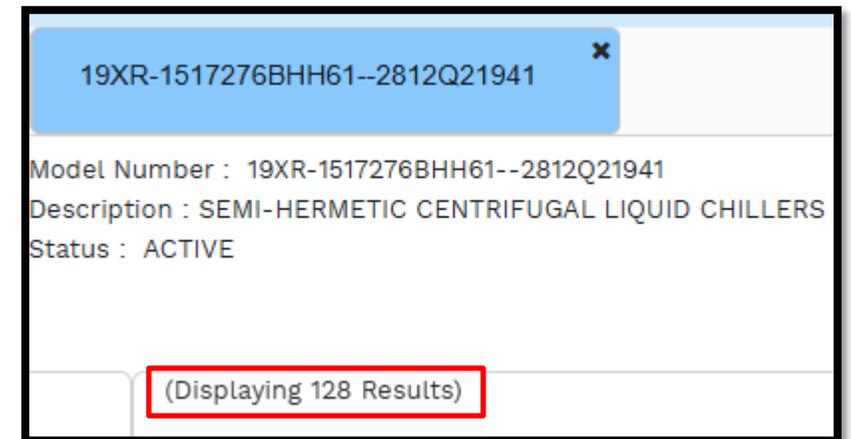
- No serial breaks to decipher
- No more 'Overloaded' BOMs to decode
- Faster BOM load times (1000's of lines vs 100's)



19XR-FR#5

Model Number : 19XR-FR#5  
Description : ALL 19XR MACHINES WITH FRAME 5 COMPRESSOR, COMPR. SIZE  
Status : ACTIVE

(Displaying 901 Results)



19XR-1517276BHH61--2812Q21941

Model Number : 19XR-1517276BHH61--2812Q21941  
Description : SEMI-HERMETIC CENTRIFUGAL LIQUID CHILLERS  
Status : ACTIVE

(Displaying 128 Results)



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# Wildcards

Wildcards ( ' ' or %) can be used to expand searches when parts of the model are unknown or can't be matched.

- Wildcards can be used in any position
- Wildcards cover a range and are not position dependent
- Wildcards can be used to make a 3-digit search into a 4-digit search (i.e., "06E%" or "39M%")

## Examples

- User wants to search all 60k BTU size 59MN7 series units to generate a stocking list.
  - Search "59MN7%060"
- User wants to find their 19XR model with serial 2912Q21953
  - Search "19XR%2912Q21953"

Model Number/Name  Part Number/Name  Serial Number

Please enter a model number prefix value min. 4 characters. Use '%' or ' ' (space char) for wildcard search

59MN7%060

- 59MN7A060V171114 - 97% CARRIER MODULATING INFINITY SERIES GAS FURNACE, 115-1-60
- 59MN7A060V171214 - 97% CARRIER MODULATING INFINITY SERIES GAS FURNACE, 115-1-60
- 59MN7A060V211220 - 97% CARRIER MODULATING INFINITY SERIES GAS FURNACE, 115-1-60
- 59MN7B060C171114 - 97% CARRIER MODULATING INFINITY SERIES GAS FURNACE, 115-1-60
- 59MN7B060C211120 - 97% CARRIER MODULATING INFINITY SERIES GAS FURNACE, 115-1-60

Model Number/Name  Part Number/Name  Serial Number

Please enter a model number prefix value min. 4 characters. Use '%' or ' ' (space char) for wildcard search

19XR%2912Q21953

- 19XR-1517276BHH61--2912Q21953 - SEMI-HERMETIC CENTRIFUGAL LIQUID CHILLERS



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# Reverse Wildcard Search

- Built in search functionality to aide users in finding legacy overloaded BOMs as well as converting discreet BOM to catalog BOM.
- **Logic Steps**
  - User enters a model number greater than 16 digits and if no exact matches are found the system automatically searches for the same model but with a “-” in the 13<sup>th</sup> digit.
  - If no exact model is found then PIC will search for the first 8 digits.
  - If no exact match is found using the first 8 digits then an 8 digit search with a wildcard in the 5<sup>th</sup> digit is searched.
    - 48HCDA04A0A1A0B0A0
    - 48HCDA04A0A1-0B0A0
    - 48HCDA04%
    - 48HC%A04

Note : No exact result found. Results shown are the closest match based on a modified 8 digit search. Please use the search results below or modify your search criteria as needed.

OK



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# Q & A / DEMO

# Thank You

*Please scan the code and provide your feedback*



# RC Expediting

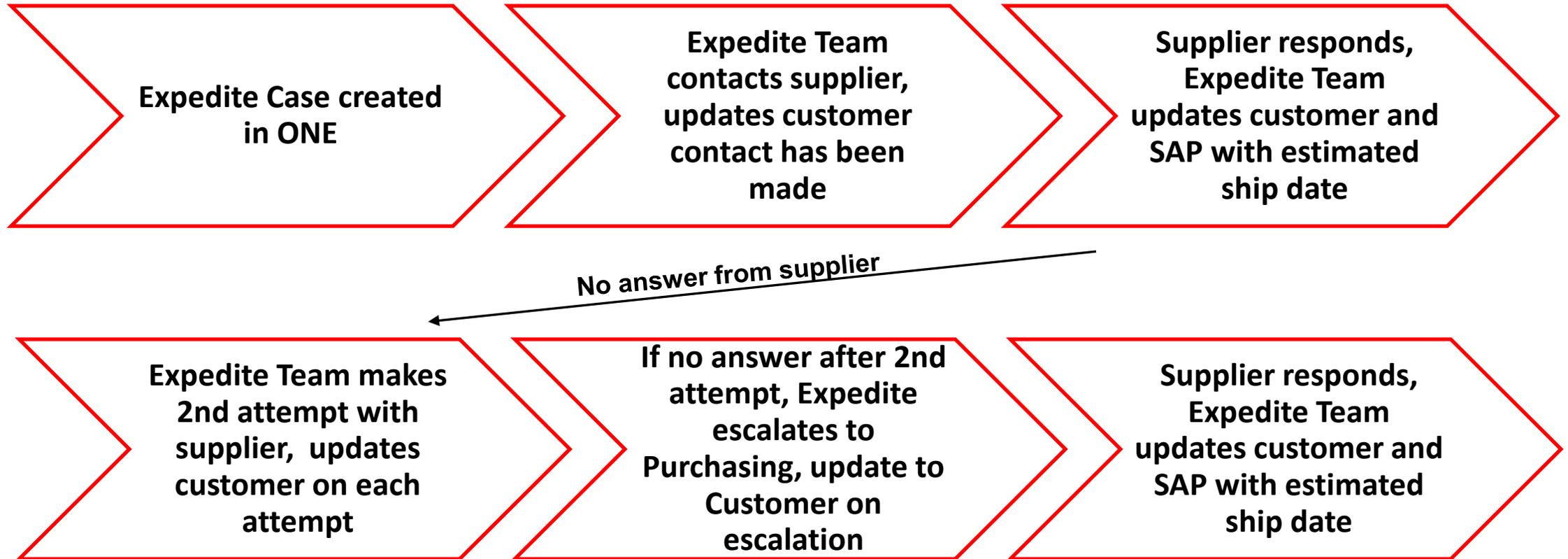


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# Closed Expedite Volume & Velocity

- Closed Expedite volume increase year over year: 13%
- 2024 Closed Volume: ~26,000
- Average Monthly Received: ~2,000
- Average Monthly Closed: ~2,150
- Expedites with Escalated Best Date: ~50%
- Expedites Coded as Unit Down: ~10%
- Unit Down Velocity Improvement: ~10 – 15%
- YTD Successful Expedite: ~65%
  - Successful Expedite Potential (w/ 1-3 days late): 91%
  - Closed Expedites within 30 Days: 65%
  - Average Improvement Days: 21

# Expedite Process



# Expedite Process (Continued)

MN / SN Required

## Customers Updated On:

- 1<sup>st</sup> Supplier Attempt
- 2<sup>nd</sup> Supplier Attempt
- Purchasing Escalation
- Promise Date
- Tracking Number

## Unit Down Additional Process:

- Substitute Inquiry with Engineering & Product Management
- Investigation with Plant for Production Line Inventory

# Create an Expedite

**ONE**

My Dashboard Cases & Expedites Product Information Order Information Claims & Warranty Administration & Support

Welcome back, **Eric Hart**

- Price & Availability
- Check Order Status
- Create Claims
- RC Expedite Request Form**
- Create Case

**Carrier**  
Turn to the experts

**Requestor Information**

Name	Eric Hart	Email		Date	02/10/2025
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**Request Details**

\* Customer PO #

\* Customer Number

\* Part

Description

\* Reason

\* Quantity

\* Customer Type

Select Reason

- Expedite
- Unit Down
- DOA (Dead On Arrival)

# View Expedite Status

**ONE**

[My Dashboard](#) [Cases & Expedites](#) [Product Information](#) [Order Information](#) [Claims & Warranty](#) [Administration & Support](#)

Welcome to the One Portal!

[Equipment Orders](#) [Part Orders](#) [Cases](#) [Expedites](#) [Claims](#)

Show  entries

Search:

Expedite Number	Case Number	Expedite Status	Customer PO#	C10 Order#	Part#	Created Date
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No data available in table

Showing 0 to 0 of 0 entries

[Previous](#) [Next](#)

# Thank You



# Customer Service

## Heather Johnson



**Universal HVAC/R  
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# Distributor Services Leadership Team



**Tricia Brown**

Assoc Dir. Distributor Services  
17 years of service



**Heather Johnson**  
Manager RC Residential  
4 years of service

CBP/ ICP Res/LTCM  
Replacement  
Component



**Jamie Stevenson**  
Manager RC Dedicated  
17 years of service

RC National Accounts,  
International, CCS  
Carrier Role



**Taylor VanDyke**  
CBP Supervisor



**Jane Dean**  
ICP Supervisor



**Stacey Portzline**  
Dedicated Supervisor

# How to contact Customer Service

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## Call or Chat

- Cancel order
- Assistance with placing an expedite
- Order changes
- Emergency/Unit down questions/Must ships
- How to questions (One Portal usage questions)

## Case

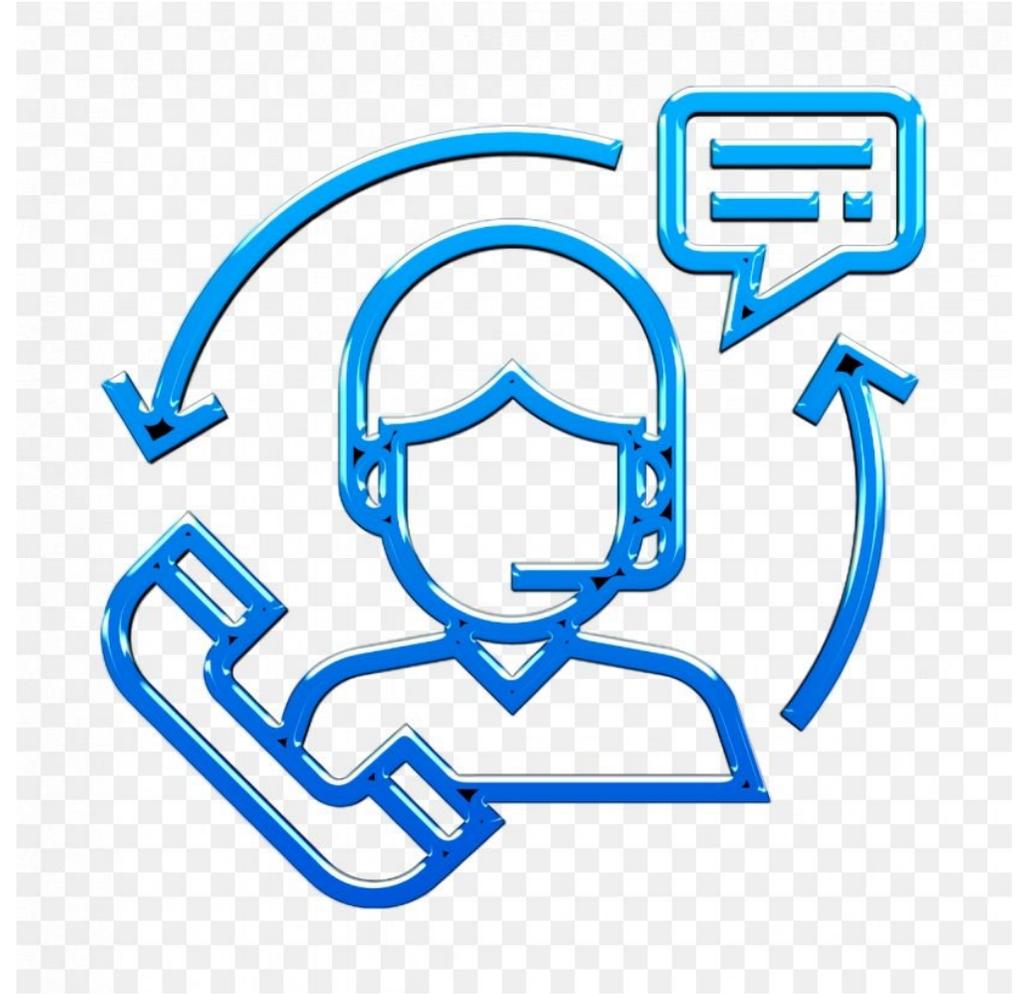
- Order status
- Part look up
- Price and availability
- Tracking info
- Packing slips (now live in ONE)
- Stock Investigations



# Year 2024

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- **Calls 20,335**
- **Chats 10,291**
- **One Portal Cases closed 19,731**



# Survey Updates

- Add Subject, purpose and sub-purpose to easily identify survey
- Changes are currently in testing
- Increase survey accuracy and results



Thank you for taking the time to participate in our customer experience survey. This survey is designed to take less than 3 minutes to complete. We sincerely appreciate your feedback.

Based on your recent experience with us, how likely are you to recommend Carrier?

Not At All Likely Extremely Likely

0 1 2 3 4 5 6 7 8 9 10

Which one of the following most influenced your score?

Carrier product quality and/or performance

Carrier product availability or delivery

Carrier distributor services agent support

Field tech support

Self serve tools

Considering only your most recent interaction, how satisfied are you with the guidance offered by the Carrier Distributor Services Representative?

Not At All Satisfied Extremely Satisfied

0 1 2 3 4 5 6 7 8 9 10

# Streamline the Experience- ONE

1.5M SELF-SERVE USES  
SINCE LAUNCH

4,700 USERS

SINGLE LOCATION FOR:

*ORDER STATUS*

*PRICE & AVAILABILITY*

*EXPEDITE PARTS*

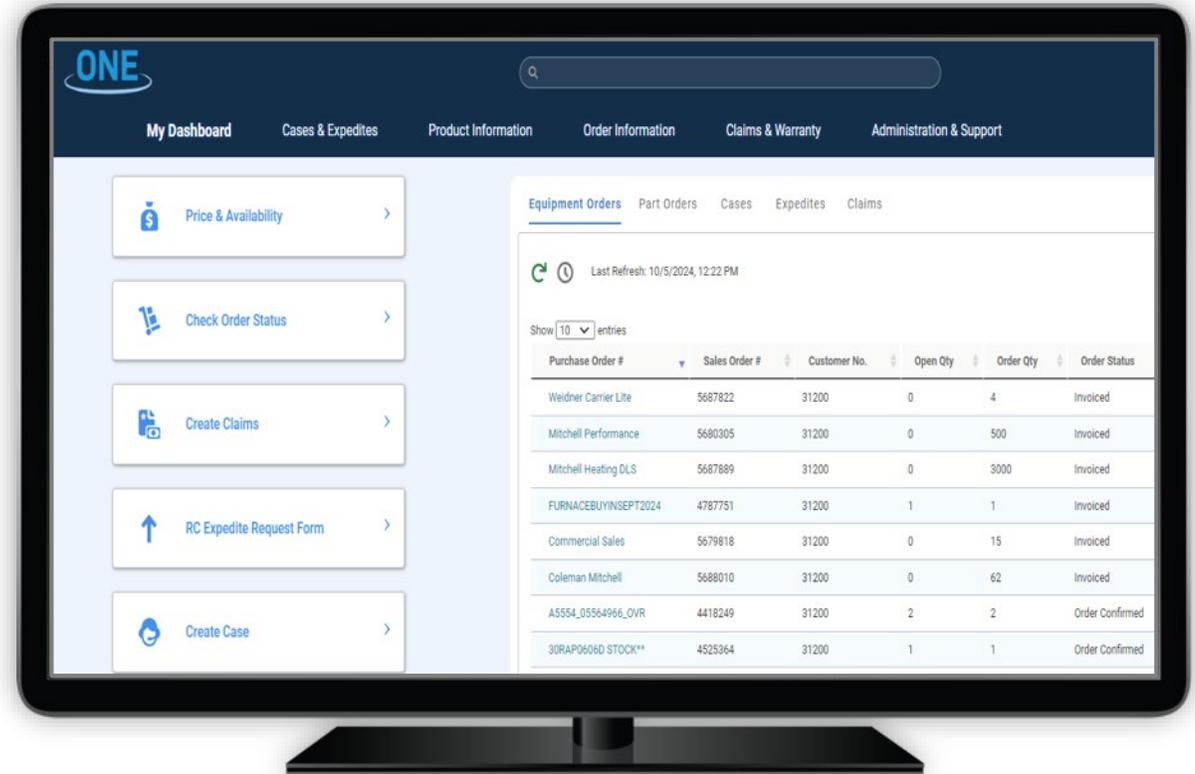
*CLAIMS*

*CASE STATUS*

*CONTACT CUSTOMER SERVICE*

*New Enhancements in 2024*

*Training request [rctraining@carrier.com](mailto:rctraining@carrier.com)*



***For user access email  
[icphvac@carrier.com](mailto:icphvac@carrier.com)***

# Ability to print packing list 12/16/24

Once the part has been invoiced you will be able to access and print the packing list through the order status by the hyper link Picklist

## ORDER DETAIL:

PO #: 2321539 Order #: 4912227 SAP Order #: 4912227

All Lines 1 Open Lines 0 Invoiced/Closed Lines 1 Cancelled Lines 0

### 48TCHSRMF3ZA00 | HARNESS ASSY, IFM



Item: 10  
Quantity: 1  
Latest CPSD: 01/09/2025  
Picklist: 0022797660  
[Shipment Details](#)

Create a Case

# Ability to print packing list continued

Using the hyper link, you will get the Packing slip to print

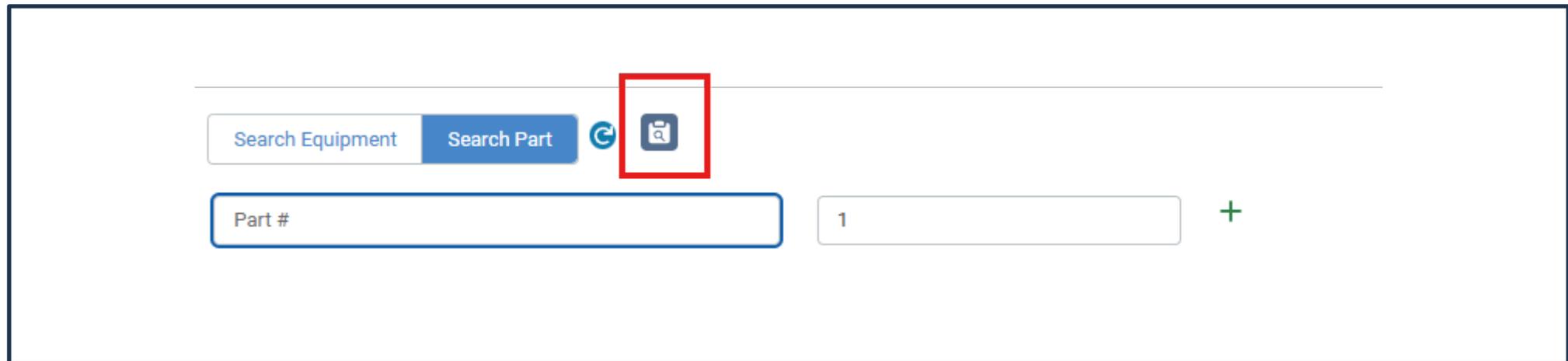
## Shipment Packing Lists

Packing lists will open in a new Tab for each "Link". Print or Save to PDF from the opened tab.

Shipment Number:	Pick List Number:	Packing List Number:	
SID7223305	22797660	P0005100488	<a href="#">Packing List</a>

# Full BOM search by model Nov 2024

In Price and Availability by using the clipboard icon you will be able to search parts built in system by model number



The screenshot displays a search interface with the following elements:

- A horizontal bar containing two buttons: "Search Equipment" (light blue) and "Search Part" (dark blue).
- To the right of the "Search Part" button is a circular refresh icon.
- A red rectangular box highlights a clipboard icon located to the right of the refresh icon.
- Below the search bar is a text input field labeled "Part #".
- To the right of the "Part #" field is a numeric input field containing the value "1".
- To the right of the numeric field is a green plus sign (+).

# Full BOM search by model continued

- Input your model number making sure you have selected the correct brand.
- The search will return a list of parts that you can choose from.
- Select the part, then get data which will return you to the price and availability tool with price, inventory, and if applicable supersede/obsolete information

### Lookup Search

Select product category type:

Model Name (Please Enter Full Model Number)

Serial Number

Select	Part Name	Description
<input type="checkbox"/>	11002015000041	MOTOR, FAN
<input type="checkbox"/>	11103020000034	COMPRESSOR
<input type="checkbox"/>	11201007000005	SENSOR, TEMPERATURE, DISCHARGE
<input type="checkbox"/>	11201007000136	SENSOR, TEMPERATURE, PIPE
<input type="checkbox"/>	11201007002020	SENSOR, ROOM TEMPERATURE
<input type="checkbox"/>	12100105000057	FAN
<input type="checkbox"/>	12100509000061	CONNECTOR, DRAIN PIPE
<input type="checkbox"/>	12122000006913	SUPPORT MOUNT, CONTROL BOX
<input type="checkbox"/>	12122000007150	COVER, VALVE
<input type="checkbox"/>	12200203000019	CLAMP, CAPACITOR
<input type="checkbox"/>	12222000001311	BOX, CONTROL
<input type="checkbox"/>	12222000001455	COVER, CONTROL BOX
<input type="checkbox"/>	12222000002259	PLATE, TERMINAL BLOCK
<input type="checkbox"/>	12222000002571	MOUNTING PLATE, SERVICE VALVE
<input type="checkbox"/>	12222000003986	GRILLE
<input type="checkbox"/>	12222000005102	HANDLE, LARGE
<input type="checkbox"/>	12222000006244	PANEL, LEFT
<input type="checkbox"/>	12222000006246	COVER, TOP

# Overage and Shortage claim all on 1 claim

## Customer Service

Purpose \*

RC/Return Materials

Sub Purpose \*

RC/Return Materials

Subject \*

Description

Reason for return\*

Mis-Shipment

Sub Reason#\*

Wrong Part

Return Details \*

\* Invoice Number

\* Customer Number (Parent Code)

366344

Find My Order

# Self-help creating your own Expedite for all brands

- All expedites need to be P5
- Include model and serial on all expedite request
- Use most accurate reason code
- Customer PO and Customer number must match original order
- Detailed description- where is unit
- Part must present with a purple box in drop down to be expedited

**Request Details**

* Customer PO #	<input type="text"/>	* Reason	<input type="text" value="Select Reason"/>
* Customer Number	<input type="text"/>	* Quantity ⓘ	<input type="text"/>
* Part	<input type="text" value="Search Parts"/>	* Customer Type	<input type="text" value="Select Customer Type"/>
Description	<input type="text"/>		

# Changes coming in 2025

## **RC Community**

- Remaining transition items identified to sunset Community
- Communication and training with targeted RC Community users

**Please visit us at the customer service area for Q&A**

# Thank You

