

CPG Warranty Portal

Residential Contractor Guide

Tremco CPG Inc.
Updated July 2022

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ACCESSING THE SYSTEM & CREATING A USER ACCOUNT

ACCESS TO THE TREMCO CPG WARRANTY PORTAL

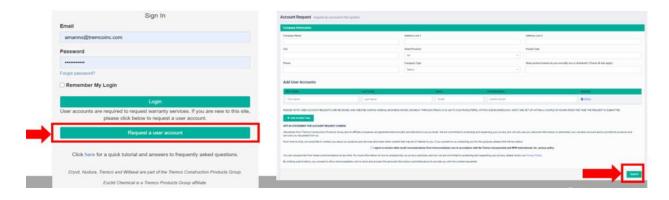


CREATING OR LOGGING INTO USER ACCOUNTS: NEW & EXSITING

(USERS CAN: Log in; request a user account; request a password reset)

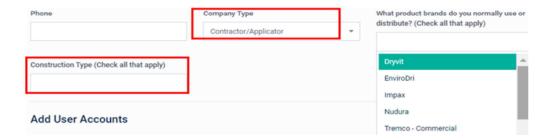
(1) TO REQUEST A USER ACCOUNT: Distributor-Applicator/Contractor

- a. Click "Request a User Account" button
- b. Complete required fields & click "Submit"
- c. NOTE: You can add more than one user to the account in one step
- d. User accounts are NOT automatically created they are reviewed and approved Monday through Friday, 8:30am 5:00pm (ET)



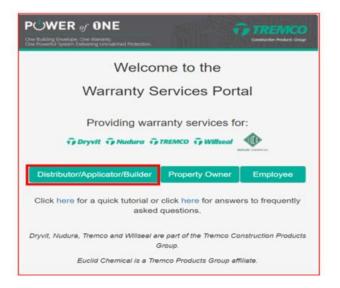
(2) NEW FIELD FOR USER ACCOUNT REQUESTS: CPG BRANDS

- a. From the dropdown, select brands for which you typically need to request warranties
- b. From the dropdown, select which type of construction (ex. Commercial buildings, multi-family homes, etc.)
- c. Multiple selections are allowed for Brand and Construction Type scroll down to see the full list



(3) TO LOG IN

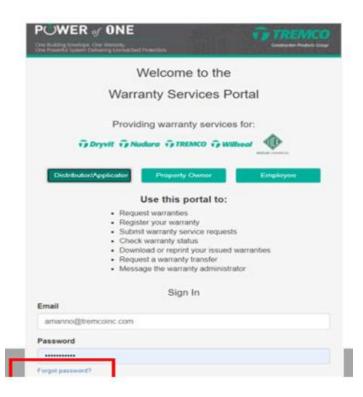
- a. Click on the Distributor/Applicator/Builder login button
- b. Enter your email address & password (10 characters minimum can be any combination of letters, numbers, special characters)
- c. Click the Login button

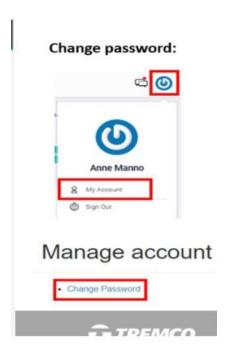




(4) RESET PASSWORD

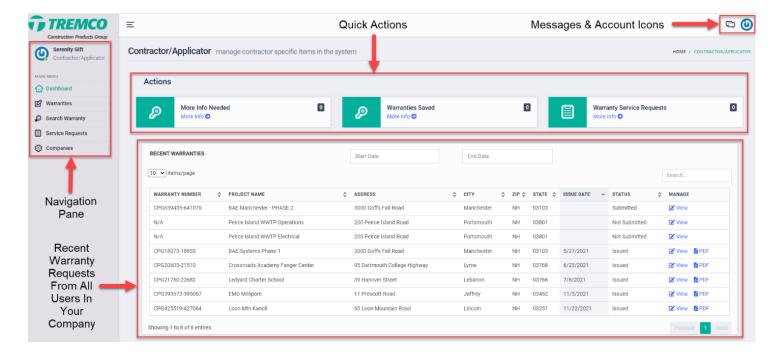
- a. Request password reset
 - i. Click "Forgot Password"
 - ii. System will auto generate a new password that you can change after you log in with the temporary password
- b. Changing your password
 - i. Click the blue Account icon
 - ii. Click on "My Account"
 - iii. Click on "Change Password"
 - iv. Create your new password must be a minimum of 10 characters (letters, numbers, and/or special characters)





CPG PORTAL DASHBOARD OVERVIEW

CONTRACTOR DASHBOARD



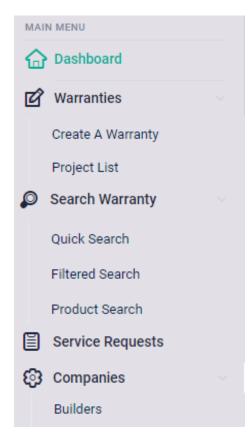
QUICK ACTIONS OVERVIEW:

- More Info Needed shows warranties that are waiting on more information before issuance
- Warranties Saved shows warranties saved in the system by someone from your company
- Warranty Service Requests shows new requests for service from homeowners

RECENT WARRANTIES BOX OVERVIEW:

This area shows all recent warranty requests from all users in your company. Click on the "VIEW" button to the right of any warranty to go into the warranty request. Click on the "PDF" button to the right of any warranty to download the issued warranty document.

NAVIGATION PANE OVERVIEW:



Warranties Tab Overview

Create a Warranty – allows the user to enter project/warranty information and submit for approvals

Project List – allows the user to see all projects they are associated with

Service Requests Tab Overview

Please reference the <u>Residential Contractor</u> <u>Warranty Service Request Instructions</u> for more information.

Companies Tab Overview

Builders – allows you to search for builder accounts in the CPG portal as well as create new builder accounts.

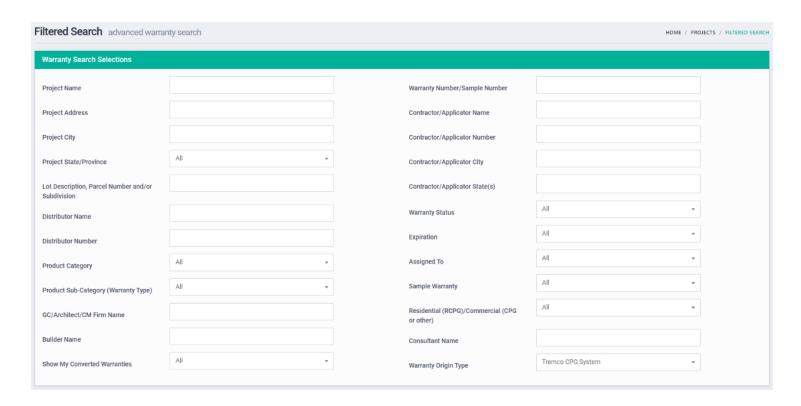
Please reference the <u>Residential Contractor Creating a Builder Account</u> <u>Instructions</u> for more information.

Search Warranty Tab Overview

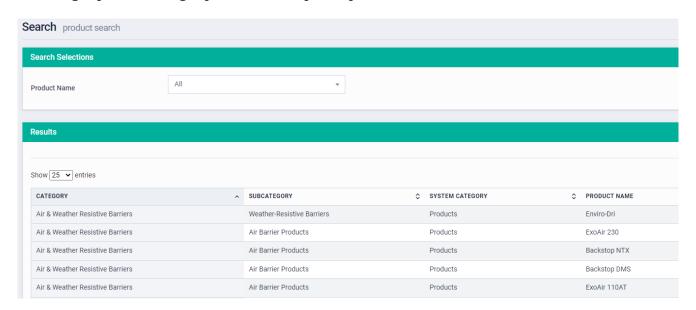
Quick Search – allows user to search for a warranty by project name, warranty number, project number, or address



Filtered Search – allows user to search for a warranty by several different criteria



Product Search – allows user to search for a product to find the product category/sub-category for warranty entry



More information on Search Functions can be found on pages 22 - 27

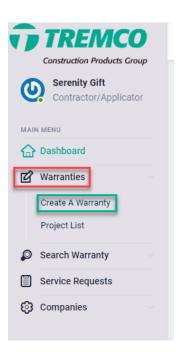
ENTERING A WARRANTY INTO THE CPG PORTAL

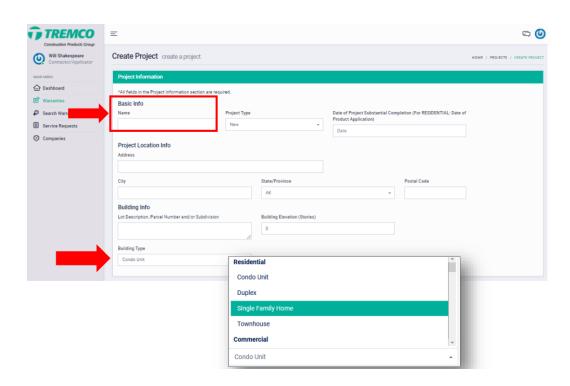
Step #1: Sign into your CPG Portal Dashboard

Step #2: From your Dashboard, click on WARRANTIES in the navigation pane, on the left-hand side of your screen.

Step #3: From the WARRANTIES drop-down, click on CREATE A WARRANTY

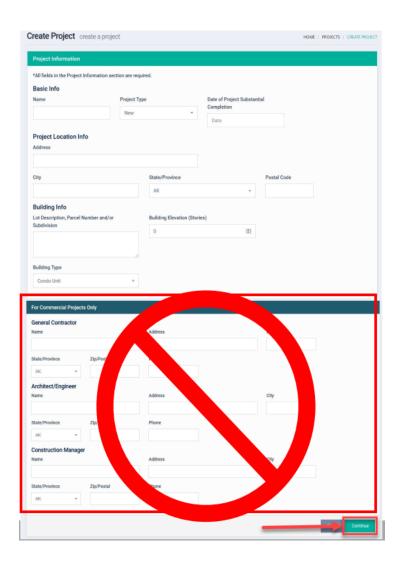
Step #4: The next screen is the PROJECT Information screen. You will need to enter all the Basic Information about your project.



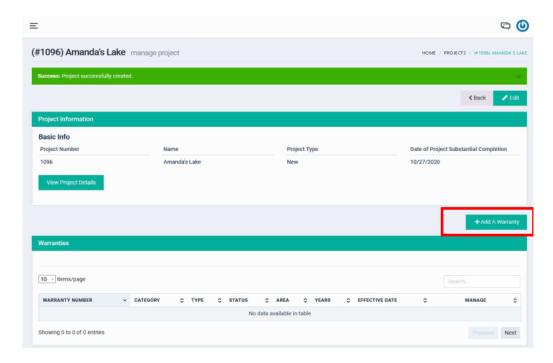


Notes about the PROJECT Information Screen:

- 1. If you know the homeowner's name, you can use that as your project name. If not, please enter the name of the Builder into this space.
- 2. The Date of Substantial Completion is the date you <u>applied the product</u>, not the date the home was completed.
- 3. Under BUILDING INFO, you are required to fill in the Lot Description/Parcel Number/Subdivision. If you do not have this information, please put "N/A".
- 4. For Building Type, select from the Residential drop-down list.
- 5. In most cases, you will skip the "For Commercial Projects Only" area and click on CONTINUE once all the other information is filled in.
 - a. Note: This area can be used for Light Commercial projects.



Step #5: Once the Project Information is completed, you will need to add the PRODUCT Information by clicking on +Add A Warranty



Step #6: Complete the Owner Information

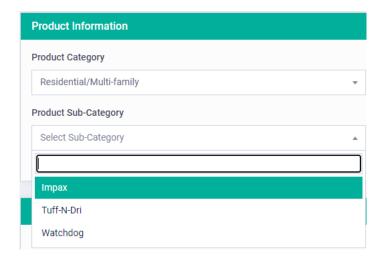
The owner should be the legal entity that owns the home. If you do not have the homeowner's name, put the Builder's information in this space



Step #7: Complete the PRODUCT Information Section

Notes about the PRODUCT Information Section

- 1. Product Category: Residential/Multi-Family
- 2. Product Sub-Category: Choose the appropriate product
- 3. Products: Choose the appropriate warranty



4. All other information is based on the conditions when the work was performed. Please fill in accordingly (see next page).

Information Needed

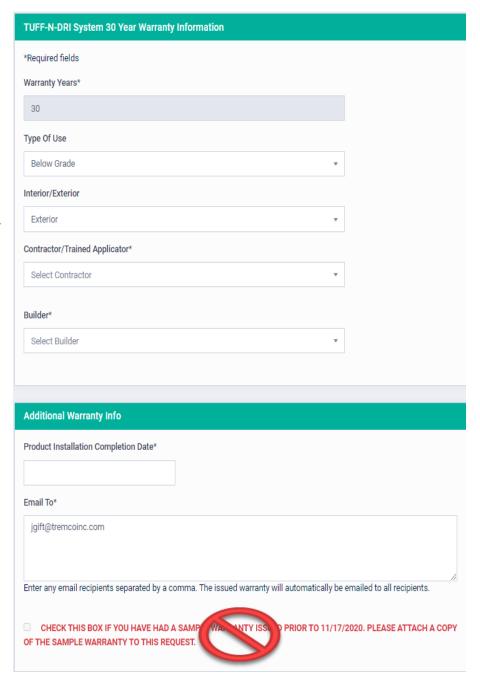
Options for Dropdowns

Application Air Temperature	°F
Wall Type	Wall Type
Select One Item	Select One Item
Membrane Gallons Used	Other
Coated Area (SF)	Unparged Block
	Poured Concrete
Membrane Batch Number	Parged Block
Check if yes:	
☑ Is there a Brick Ledge?	Drainage Type
	Select One Item
☐ Is it block?	
	Both
☐ Is it open?	Interior
	Exterior
Drainage Type	
Select One Item	Drain Tile Connected To
Drain Tile Connected To	Select One Item
Select One Item	_
	Sump Basket
Check if yes:	N/A
Foundation Penetrations Present at Time of Installation	Daylight
	Other
☐ Was it sealed?	
WARM-N-DRI/ or Barrier Board Thickness	WARM-N-DRI/ or Barrier Board Thickness
Select One Item	Select One Item
WARM-N-DRI/ or Barrier Board Area Covered (SF)	1-3/16"
	3"
	3/4" 2-3/8"
	2-3/0

Step #8: Complete the Warranty Information Sections

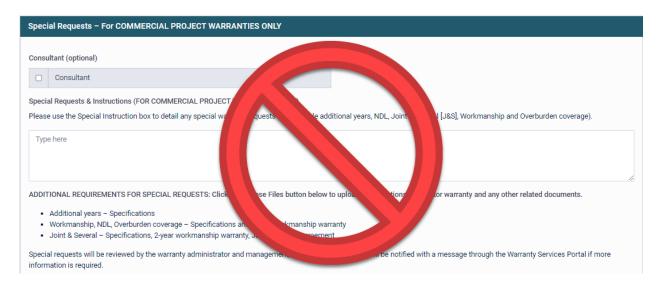
- Warranty Years this will auto-populate for you
- 2. Type of Use Choose how product was applied (will be BELOW GRADE for most projects)
- 3. Interior/Exterior –
 Choose where product was applied
- 4. Contractor/Trained
 Applicator this will
 auto-populate for you
- 5. <u>Builder</u> Choose the builder for this project
- 6. Product Installation

 Date this will not pull over from the Project Information, you will need to enter the date of installation here
- 7. Email To this will auto-populate with your email address (to add more email addresses separate with a comma)



You should not need to worry about the check box for sample warranties – this is for projects that were issued project specific sample warranties prior to November 2020.

In most cases, you will skip the SPECIAL REQUESTS area – this is for light commercial or commercial projects only

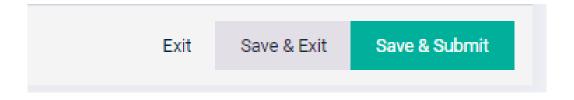


Step #9: Submit your warranty request

To save your warranty request WITHOUT issuing the warranty document, click on "Save & Exit"

This is generally done if you are awaiting payment for your work or if you do not have all information when filing for the warranty

To save your warranty request AND issue the warranty document, click on "Save & Submit"

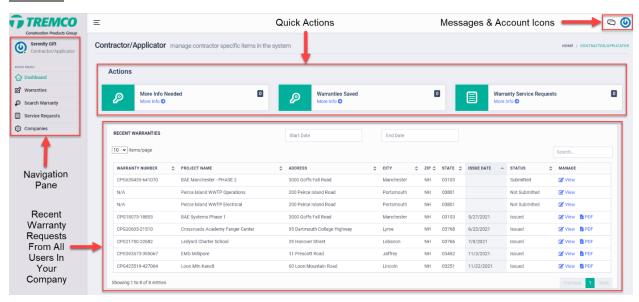


EDITING A WARRANTY IN THE CPG PORTAL

Step #1: Sign into your CPG Portal Dashboard

Step #2: From your Dashboard, you can search for the warranty you need to edit in multiple areas.

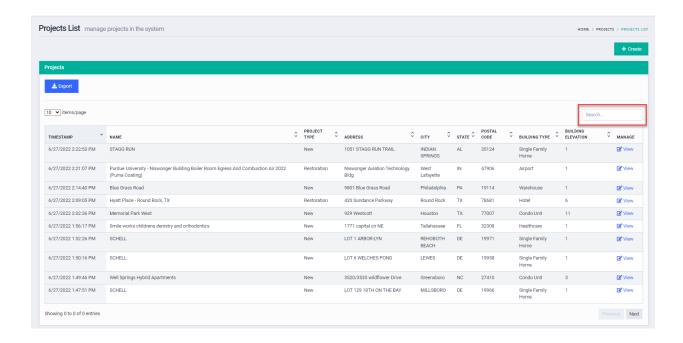




If you find the warranty you need in the Recent Warranties box, click on VIEW, in the Manage column, to enter the warranty request (and skip ahead to Step #3)

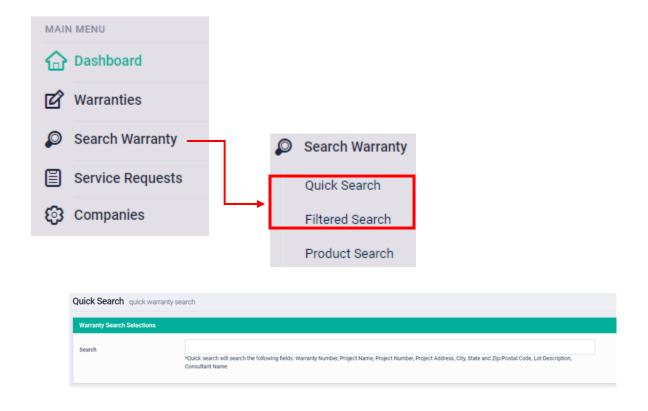
Area #2 - Project List

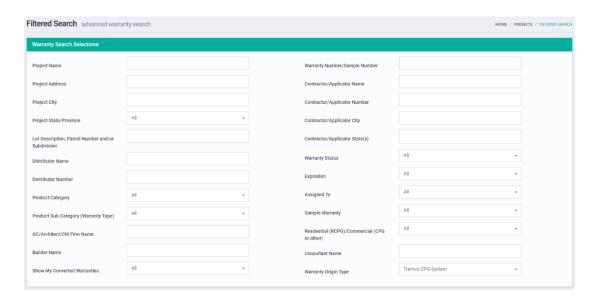




You can use the Search Bar in the Project List to search by Project Name, Project Address, or Project Number.

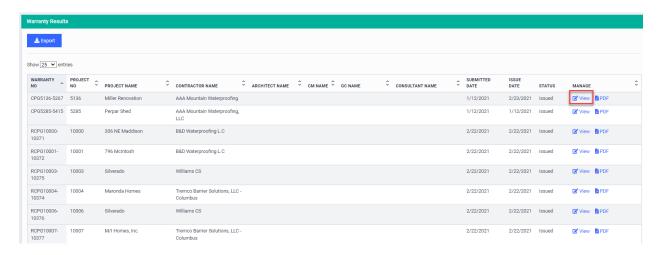
Area #3 - Quick Search/Filtered Search





For instructions on how to use the Quick Search and Filtered Search functions, please see the Residential Contractor Instructions for Search Methods.

Once you have found the warranty you need to edit click on VIEW, in the Manage column, to enter the warranty request.



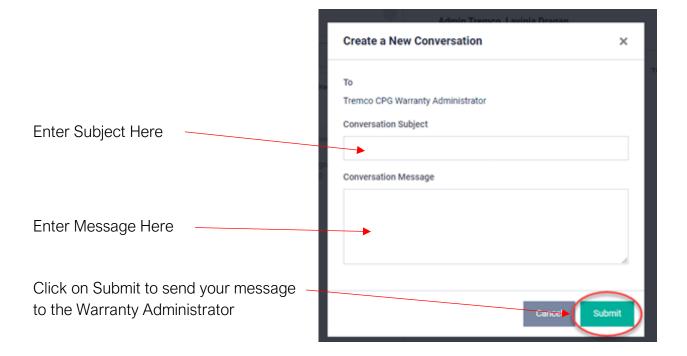
Step #3: Message the Warranty Administrator

Once you have entered the warranty request, scroll to the bottom of the page, and use the CONVERSATIONS area to send a message to the Warranty Administrator.



Click on the "+" sign to start a new conversation.

Type in your Conversation Subject and Message, then hit SUMBIT

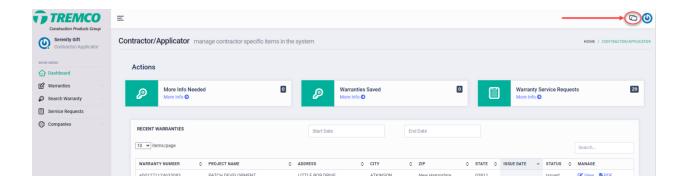


Your message should include the change you are requesting as well as the reason the change needs to be made (i.e., a mistake was made when inputting the information, customer request, etc.).

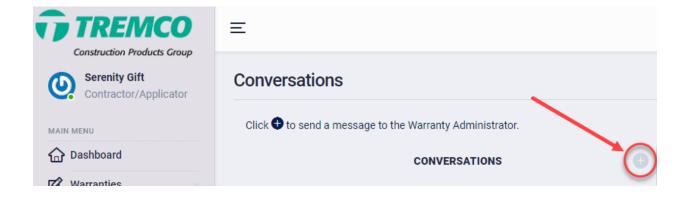
USING THE PORTAL MESSAGING SYSTEM

HOW TO MESSAGE THE WARRANTY ADMINISTRATOR:

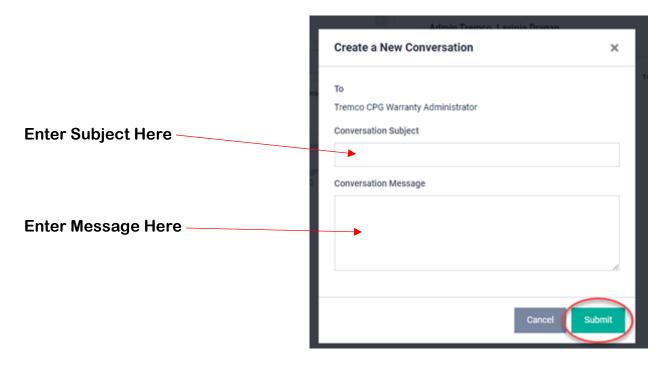
Step #1: Click on the MESSAGES icon in the upper right corner of your portal dashboard



Step #2: Click on the "+" next to CONVERSATIONS



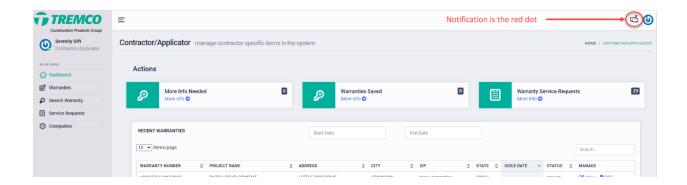
Step #3: Type in your Conversation Subject and Message, then hit SUMBIT



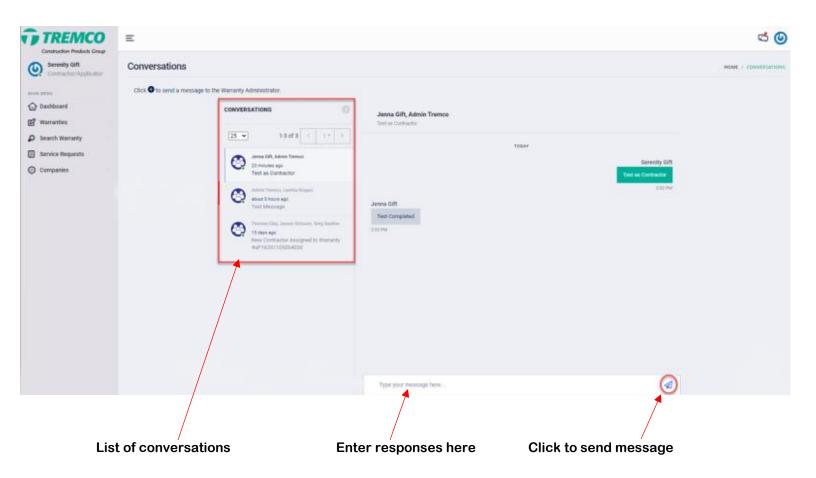
Your message will be sent to a Warranty Administrator. When you have received a reply, you will get an email notification and you will see a notification on the MESSAGES icon.

HOW TO RETRIEVE MESSAGES THAT HAVE BEEN RESPONDED TO:

Step #1: Click on the MESSAGES icon in the upper right corner of your portal dashboard (new notification is indicated by the red dot on the icon)

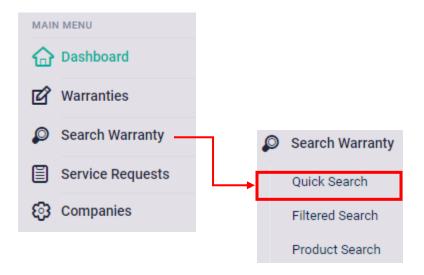


Step #2: Your list of messages will come up. Click on the message you want to read. You may also respond to the Warranty Administrator's questions/comments from this area.



CPG PORTAL SEARCH FUNCTIONS

Quick Search Function



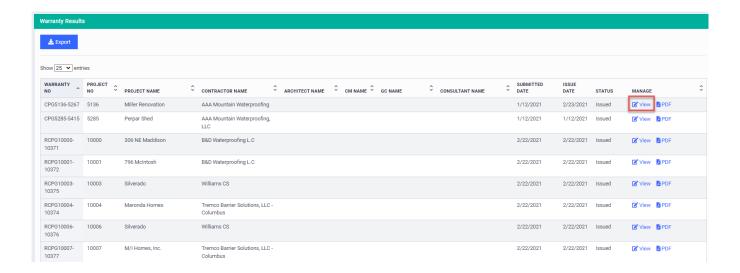


Quick Search is a fast and easy way of looking for warranty data.

You can enter the full or partial name of the project, the address of the project, or the warranty number to search.

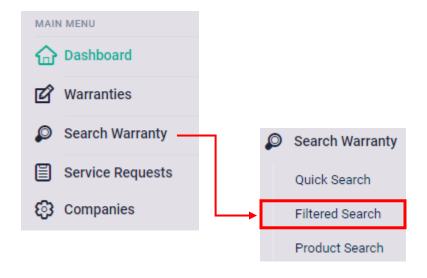
Note: Alphabetic prefix (RCPG) is not required when using the search functions

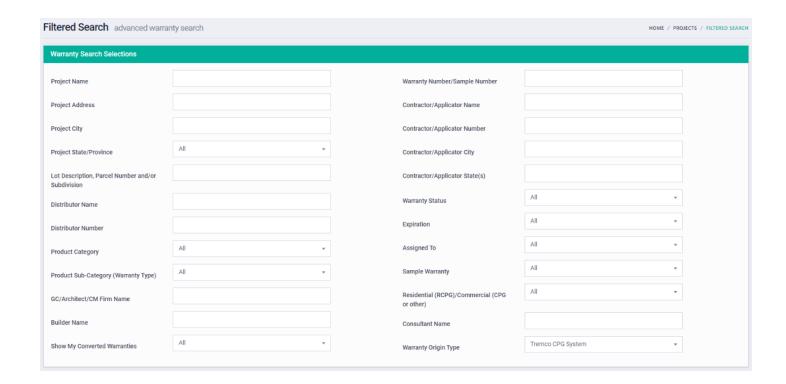
Your search results will list at the bottom of the screen, showing the warranty status. From here you will be able to view the warranty PDF (if the warranty has been issued) or go into the warranty request by clicking on VIEW in the Manage column.



Information from this screen, once filtered, can be exported into a Microsoft Excel file for your records/convenience.

Filtered Search Function





Filtered Search is a tool that expands your options for what to search by when looking for warranty project.

You can use this function to search by any of the following:

Project Name

Project Address/City/State

Lot Description/Parcel Number/Subdivision

Distributor Name

Product Category

Product Sub-Category

GC/Architect/CM Firm Name

Consultant Name

Builder Name

Warranty/Sample Number

Contractor or Applicator Name

Contractor or Applicator City/State

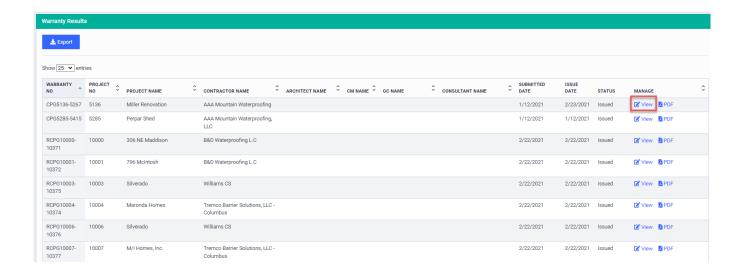
Warranty Status

Expiration Status

Assigned To Status

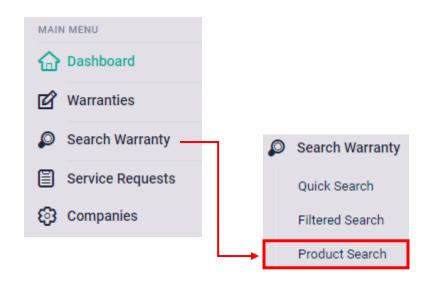
Type of Warranty (Residential/Commercial)

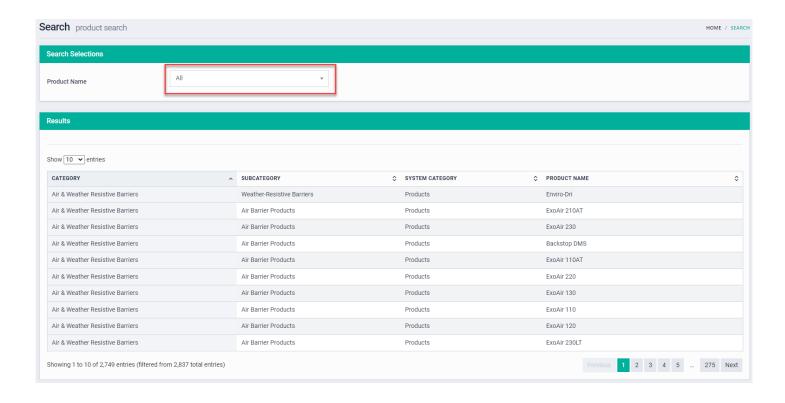
As with the Quick Search function, your search results will list at the bottom of the screen, showing the warranty status. From here you will be able to view the warranty PDF (if the warranty has been issued) or go into the warranty request by clicking on VIEW in the Manage column.



Information from this screen, once filtered, can be exported into a Microsoft Excel file for your records/convenience.

Product Search Function

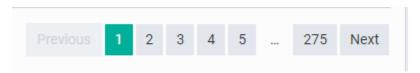




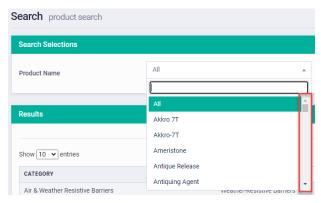
The Product Search tool helps determine which product category and subcategory should be used to file for a warranty.

There are three ways to use this tool.

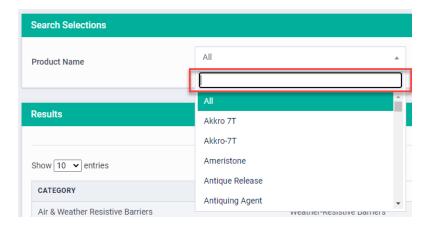
1. Scroll through the pages of all our offered products using the page numbers at the bottom right-hand side of the screen.



Click on the drop down at the top of the page and scroll through our available products until you find the one you need.



3. Click in the drop down at the top of the page and start typing in the name of the product you need until it pops up in the selection box.



Whichever way you get to the product name you are looking for, when you select it, the list will populate all the Product Category and Product Sub-Category options for that product.

If your product is listed in multiple categories or sub-categories, you will need to determine which one fits best with the application for your specific project.

NOTE: All Tremco CPG warranty product offerings are located within the Product Search Function screens.

BUILDER ACCOUNTS

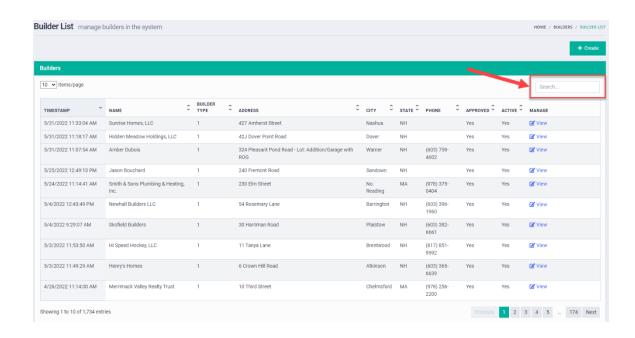
HOW TO SEARCH FOR A BUILDER:



Step #1: Click on the COMPANIES tab in your Dashboard Navigation Panel

Step #2: Click on BUILDERS

Step #3: To search within the CPG Warranty Portal, use the search bar on the right-hand side of the screen to search for your builder. You can search by name, address, or city.



INFORMATION PROVIDED ON THE BUILDER LIST:

Timestamp – shows when this builder account was created

Name – shows the name of the builder

Builder Type – shows either 1 (Custom) or 2 (Production) to indicate which type of homes this builder is assigned to

Address - shows the builder's street address

City - shows the builder's city

State - shows the builder's state

Phone – shows the builder's phone number

Approved - shows the builder's approval status

Active - shows if the builder is or is not active in our system

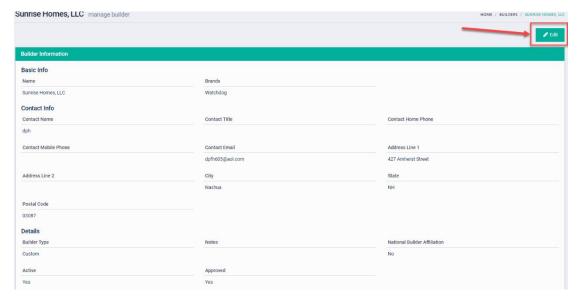
Manage – allows you to view the builder account or make edits to existing accounts

EDITING AN EXISTING BUILDER ACCOUNT:

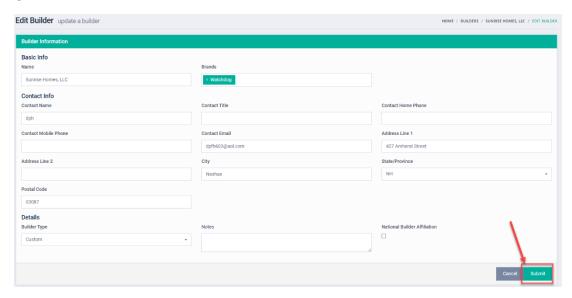
Step #1: Click on VIEW next to the builder account you want to edit



Step #2: Click on the EDIT button in the top right-hand corner of the screen



Step #3: Make necessary edits and then hit the SUBMIT button to save the changes



Note: if you decide not to make any changes, hit the CANCEL button

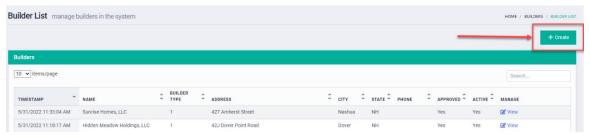
CREATING A NEW BUILDER ACCOUNT:



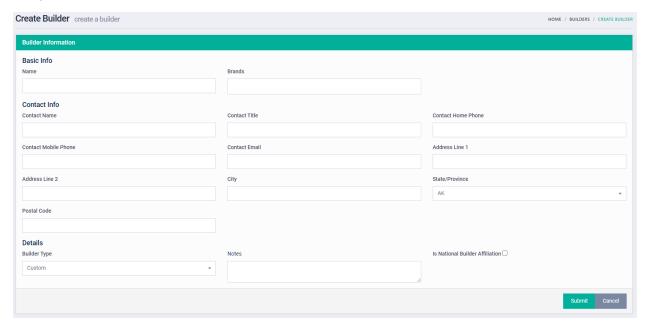
Step #1: Click on the COMPANIES tab in your Dashboard Navigation Panel

Step #2: Click on BUILDERS

Step #3: Click on CREATE in the upper right-hand corner of the screen



Step #4: Fill in all fields then hit SUBMIT to save the account



Note: You will need to choose which brand(s) the builder is contracting you for. Your choices are as follows:

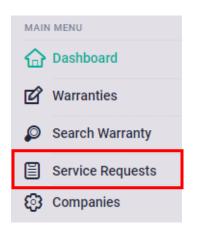
- Dryvit
- Euclid Chemical
- Nudura
- Watchdog
- Tremco Commercial
- Willseal
- Tuff-N-Dri
- Residential Direct
- Impax

For residential projects, you will most likely be selecting Watchdog, Tuff-N-Dri, or Impax.

Important Note: Builder accounts do <u>not</u> get users assigned to them, as builders are not permitted to file for warranties in our CPG warranty portal. Once you have filed for a warranty, YOU ARE RESPONSIBLE FOR FORWARDING THE ISSUED WARRANTY DOCUMENT TO THE BUILDER.

HANDLING WARRANTY SERVICE REQUESTS

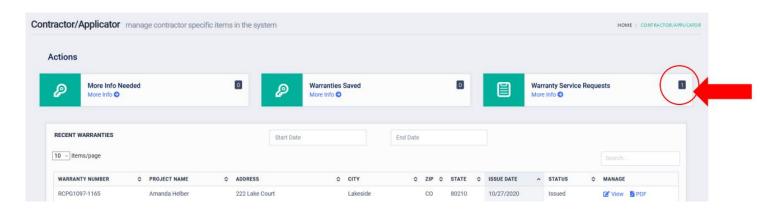
WHERE TO FIND SERVICE REQUESTS ASSIGNED TO YOUR COMPANY:



You can find your service requests by clicking on the Service Requests tab in your Navigation Menu

OR

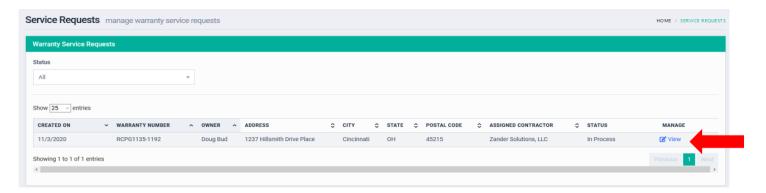
By clicking on the Warranty Service Requests button in your Dashboard Quick Actions



WHAT TO DO WITH SERVICE REQUESTS ASSIGNED TO MY COMPANY:

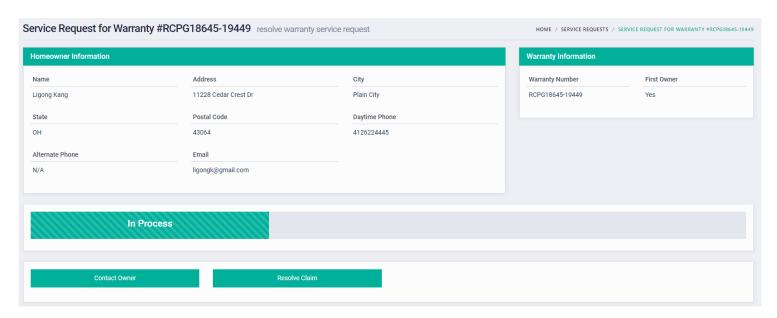
Step #1: View the Service Request Details

On the Service Requests page, you will see a list of all requests assigned to your company. This list will include identifying information about the warranty as well as the status of the request.



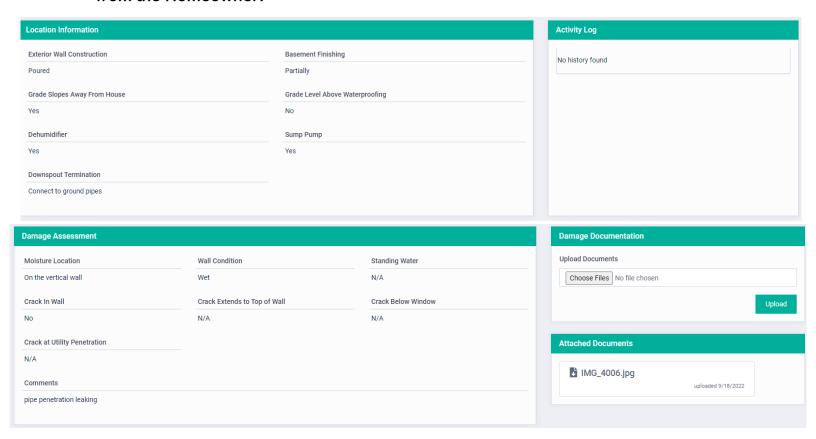
To enter the request, click on VIEW.

Once you enter the service request you will see the Homeowner Information and Warranty Information at the top of the page.

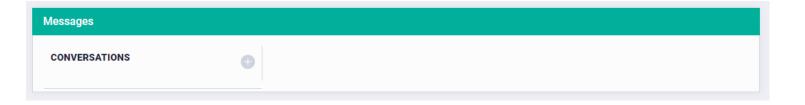


Under the Homeowner and Warranty Information is the status of the request as well as your Action Buttons (please see instructions on page 35 for what these buttons do).

Below your action buttons you will find the Location Information, Damage Assessment, Activity Log, Damage Documentation, and Attached Documents from the Homeowner.



Lastly, the bottom of the page contains the CONVERSATIONS area where any communication regarding this service request should take place.

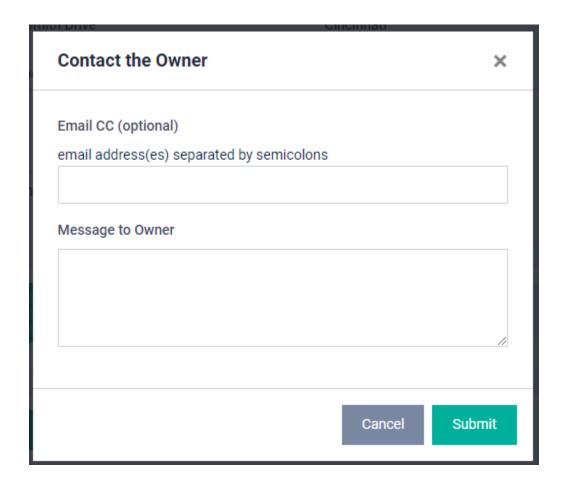


Action Buttons

You have two options available for new service requests.

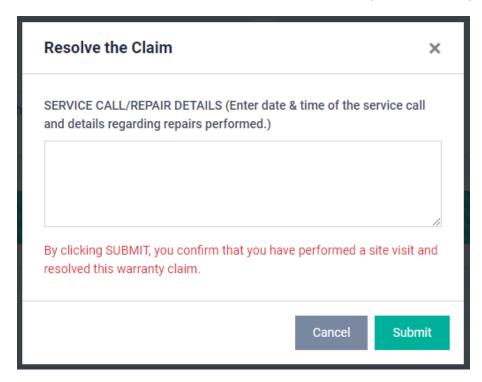
Option #1: Contact the Owner

Clicking on the CONTACT OWNER button will allow you to send an email message to Homeowner through our CPG poral. You can use this to initiate communication on scheduling their inspection/service.



Option #2: Resolve Request

Clicking on the RESOLVE CLAIM button will mark this request as completed.



You will be asked to supply the date of service as well as all service notes regarding repairs made during your inspection.

Please note that, by clicking on SUMBIT, you are confirming that you have performed a site visit and that this warranty service request in resolved.

WHAT TO DO IF THE REQUEST IS FOR NON-WARRANTED ISSUES:

If you are investigating a service request and find the issue to be non-warranted, you will need to discuss this with the homeowner and RESOLVE the service request in the CPG portal.

All questions regarding the warrantability of an issue or technical questions should be directed to your TBS Technical Representative.

If you have any questions, please contact the Warranty Department

Phone number 800-876-5624

Email warrantyadmin@tremcoinc.com