AssetWORKS

# Warranty Management

## User Guide

Version 24.x
Last Modified 24.0 | March 2024

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# Technical Support

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Customer Support is available Monday through Friday, 7:00 a.m. to 7:00 p.m., Eastern Time.

Telephone: 1-610-225-8300

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

The support website can be used to open issues, subscribe to user groups, and download documentation, as well as to access the latest AssetWorks news. For secure access to the website, contact Customer Support by calling the number above.

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## Contents


**Overview** ..... **1**

Definitions ..... 1

Warranty Workflow ..... 2

**1. Initial Configuration** ..... **3**

Work Accomplished Codes ..... 4

Job Reason Codes ..... 5

Role Privileges ..... 5

Warranty Claim Cancellation Reasons ..... 6

Claim Category Definitions ..... 7

Adjust Invoice Claim Reason ..... 7

**2. Warranty Policy Configuration** ..... **8**

OEM Configuration ..... 8

Warranty Tech Spec ..... 8

Warranty Unit Setup ..... 12

Replacement Part Warranty Configuration ..... 13

Warranty Part Setup ..... 13

Location Main ..... 14

**3. Warranty Part Issues** ..... **15**

Print Part Tags ..... 17

**4. Warranty Violations** ..... **19**

Whole Unit Warranty Violation ..... 20

Extended System Violation ..... 20

Part Warranty Violation ..... 21

Changing Job Reason ..... 21

Manual Flagging of Warranty Violation ..... 22

A Quick Word on Warranty Notes ..... 22

**5. Warranty Cancellation** ..... **23**

Mass Warranty Cancellation ..... 23

**6. Warranty Claims** ..... **25**

Build Process ..... 26

Negotiation Status ..... 28

Authorize a Claim ..... 29

Cancel a Claim ..... 30
Denied Claim ..... 31
Look Up Existing Claims ..... 31
Change the Warranty Vendor ..... 32
Generating Warranty Claim Invoice Documents ..... 33
**7. Claim Credit ..... 34**
Work Order Main – Commercial Tab ..... 34
Work Order Commercial Charge Query ..... 34
Adjust Invoice Amount ..... 34
**8. Additional Information ..... 35**
Interface ..... 35
System Flags ..... 36
Reports ..... 37
Unit Warranty Terms ..... 37
Warranty Job Costs ..... 37
Work Order Cost Detail Warranty ..... 38
Work Order Warranty Cancellation ..... 39
Work Order Warranty Violations ..... 39
**9. Updates ..... 40**

# Overview

Units, their components, and their parts may have warranties from vendors and manufacturers. These warranties may overlap, and some portions of the unit might be excluded from the warranty. Units with the same technical specification will normally have the same warranty terms, and parts purchased from a given vendor will often carry the same terms. Those terms can be usage-based or time-based.

M5 provides for the setup of warranties on multiple levels:

Whole-unit warranties – Extending from the acquisition of the unit or when it was placed into service.

Sub-unit warranties – Based on VMRS assembly codes that start at the same time or later (as with an after-market alteration).

Part warranties – Start when a part is installed. You can set default terms at the technical specification level to be carried down during unit creation.

After set up, M5 flags violations of whole-unit and sub-unit warranties at the time jobs are added to work orders and violations of part warranties when the same or functionally similar part is issued. Some transactions can be excluded from warranty violations based on job characteristics or predefined whole-unit or sub-unit exclusions.

This document describes the setup of the three different types of warranties and how M5 flags violations as well as the warranty claim process.

# Definitions

A **Whole-Unit** Warranty applies to the unit and everything on the unit. It starts when the unit is acquired or when it is put into service depending on a system flag. By definition, a unit may have only one whole-unit warranty.

A **Sub-Unit Warranty** applies to a portion of the unit based on its VMRS (ATA) system or system-assembly coding. For example, a warranty for system 17 can be defined for the tire warranty, and further refined to 17-008 for the valve assembly. The terms of a system-assembly warranty are checked before the system terms, and the system terms are checked before the whole-unit warranty terms.

A **Part Warranty** applies to a single part issued to a unit work order. The terms of a part warranty begin when the part is issued to a unit.

**Warranty Terms** are defined in terms of usage (miles, kilometers, hours from a meter, or count of actions) or time (days or months). A warranty can have either usage or time terms, or both,

but it must have one or the other. The time unit-of-measure – that is, days or months – is set on the “Time Interval” frame.

Different warranty frames can have different units-of-measure. Terms are always “whichever comes first” – if a warranty has both usage and time terms, the event must fall within both of those limits. When checking against time warranty terms, the current date and time of the event is used.

A **Warranty Violation** occurs when no exclusion applies and when:

- On a whole-unit warranty, a job is added to a work order within the warranty terms.
- On a sub-unit system-assembly warranty, a job is added to a work order within the warranty terms whose system-assembly matches.
- On a sub-unit system warranty, a job is added to a work order within the warranty terms whose system matches (regardless of the job code’s assembly).
- On a part warranty, the same part is issued within the warranty terms. If System Flag 1317 is “Y”, then a part warranty is also violated if an issued part’s VMRS system-assembly-part coding matches the warranted part’s system-assembly-part coding.
- Regardless of any defined warranties, a job is created on a work order and the job’s reason is flagged as “warranty”.

A **Warranty Exclusion** prevents M5 from flagging a warranty as violated:

- The job’s reason is flagged as “exclude from warranty.”
- The job code’s work accomplished code is flagged as “ignore warranty violations.”
- A sub-unit warranty row exists flagging the job code’s system or system-assembly as excluded.

# Warranty Workflow

1. Settings, system flags, role privileges.
2. Warranty policy configuration, OEM and/or replacement parts.
3. Warranty part issues.
4. Warranty violations.
5. Claims.
6. Credits back to the unit.

# 1. Initial Configuration

Warranty setup overview:

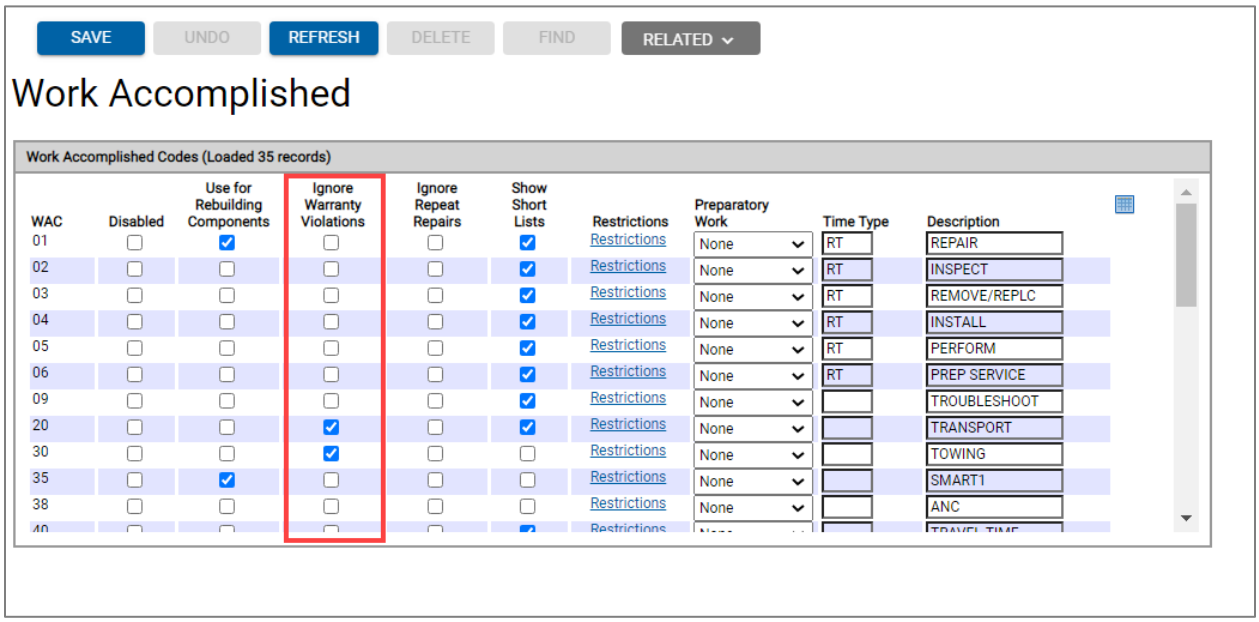
- Configuring Warranty System Flags
- Configuring Work Accomplished Codes
- Configuring Job Reason Codes
- Configuring Role Privileges
- Configuring Various Claim Reasons
- M5 security setup for all frames used in warranty processing

System flag considerations:

- How many warranty violations will be flagged system-wide
- If warranty notes are required
- Which warranty violations pop-up
- How warranty usage and time terms are calculated
- Valid warranty reason codes

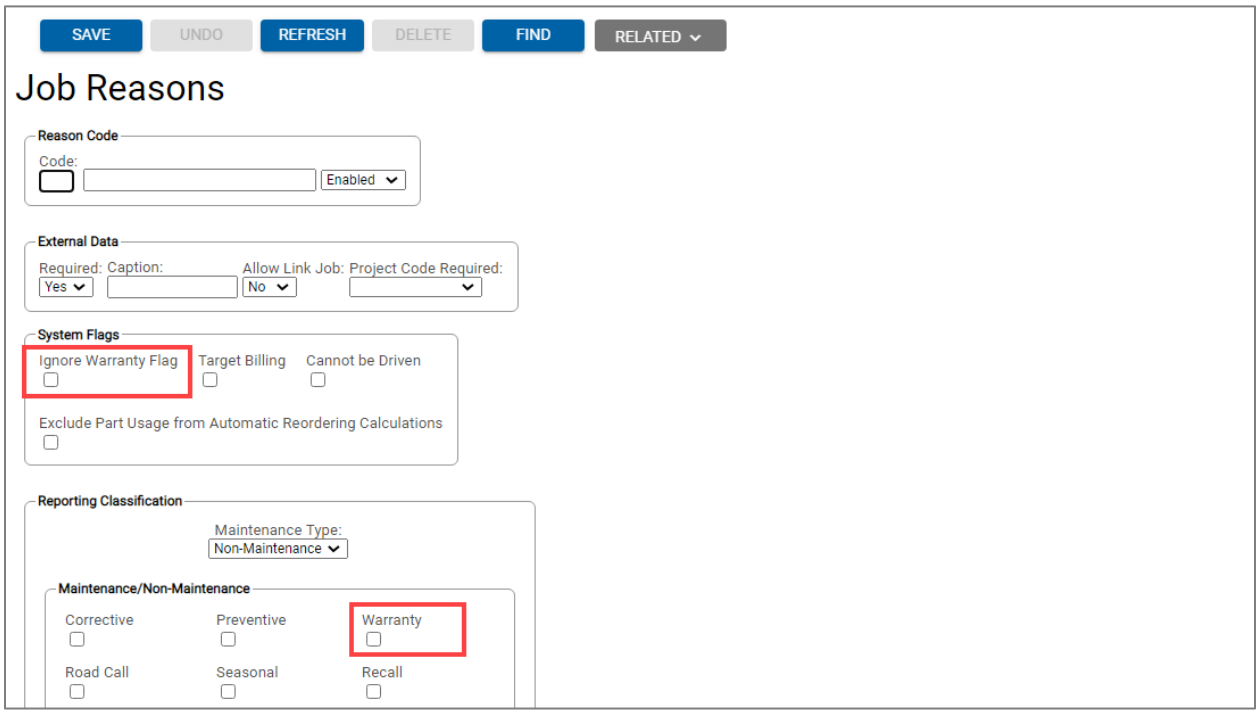
# Work Accomplished Codes

The Work Accomplished Codes frame allows you to exclude or ignore warranty violations on specific Work Accomplished Codes (WAC). Commonly, this feature is used for verbs such as “clean” or “prep for sale” where the nothing has been damaged.



# Job Reason Codes

You can set a job reason to ignore warranty flagging. Typically, a customer will set up a warranty job reason to represent manufacturer campaigns or government-mandated recall work being done outside the usual warranty period. A customer will set up an “exclude from warranty” reason for preventive maintenance, travel time, car washes, and other work where a warranty claim will never result.

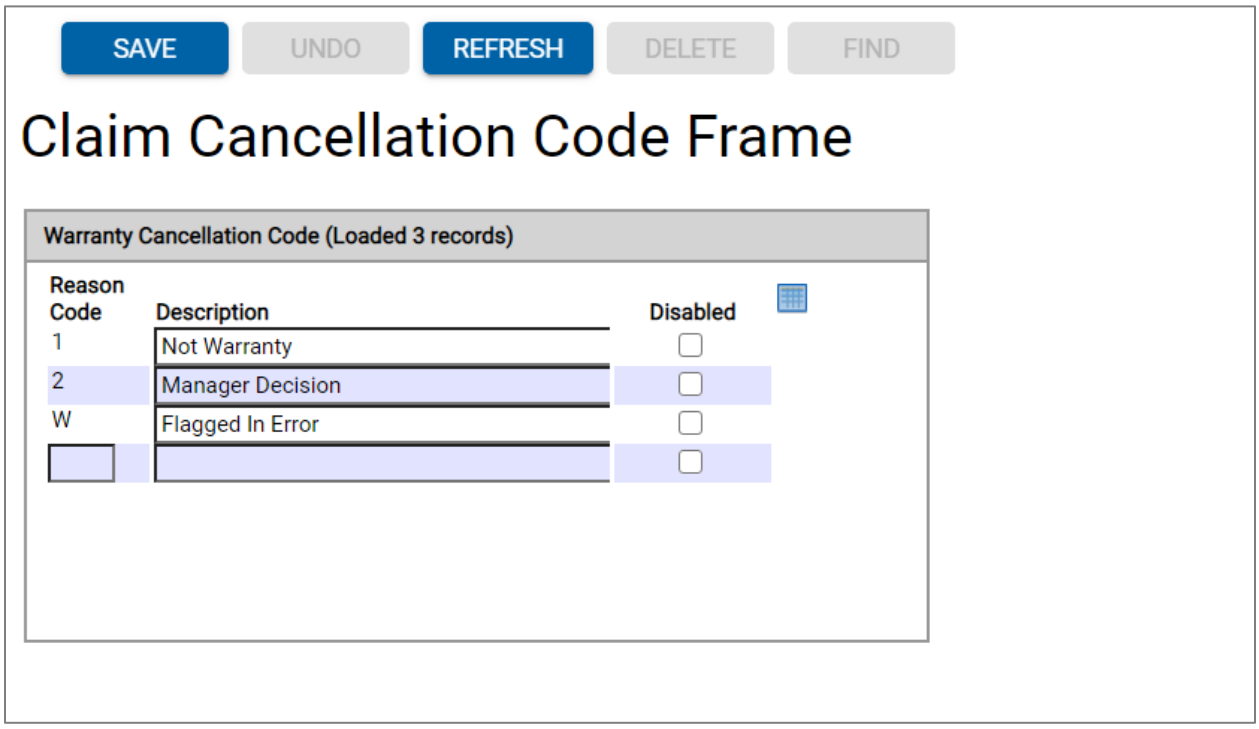



# Role Privileges

An Application User Role can have the authority to cancel a warranty violation on the Work Order and/or the authority to create a Warranty Tech Spec Template. The privileges are: UPD WARR TECH SPEC and WARR CANCELLATION.

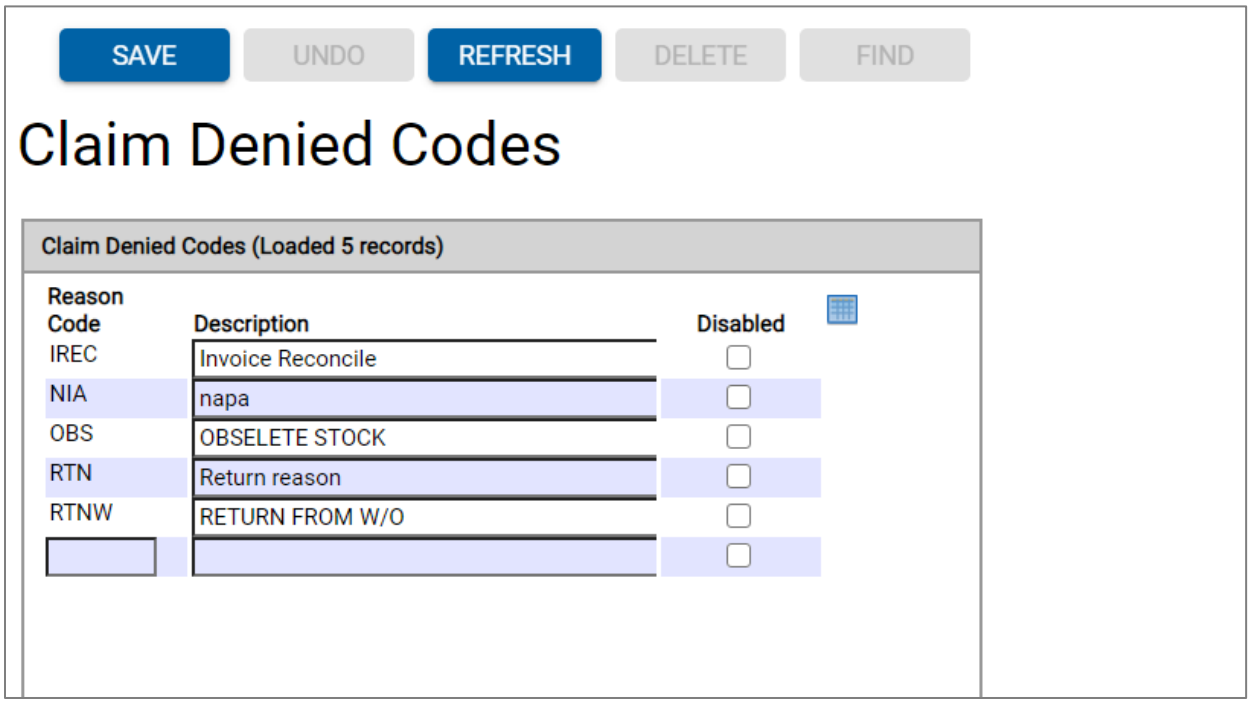
# Warranty Claim Cancellation Reasons

If System Flag 5066 is set to ‘Yes’, then users must enter a valid reason for the cancellation of the warranty. You can create and maintain the codes to define these valid reasons on the Claim Cancellation Code frame.



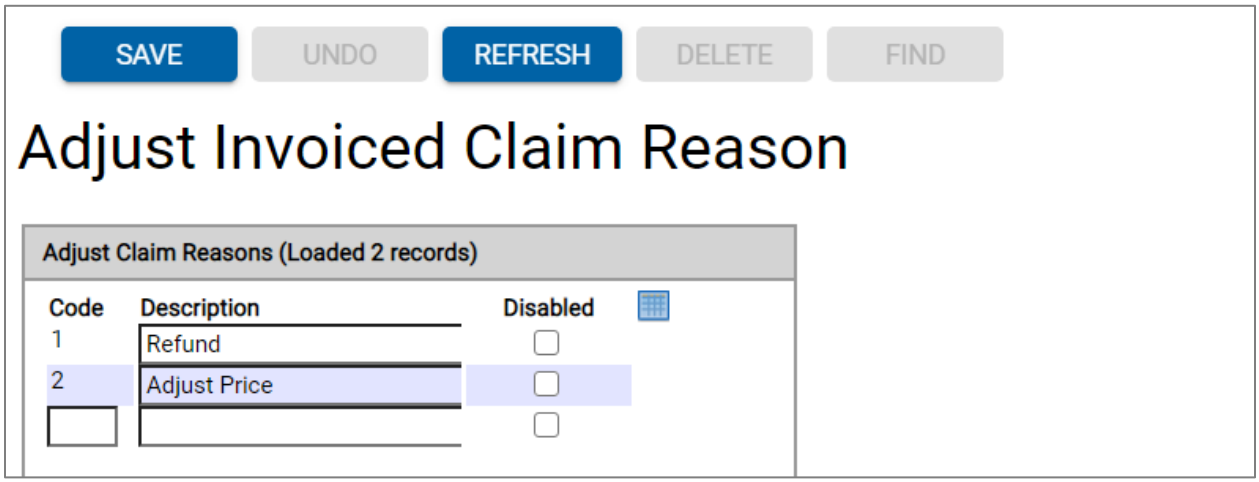
## Claim Category Definitions

You can also set up and define codes that explain why claims were denied on the Claim Denied Codes frame.




## Adjust Invoice Claim Reason

The Adjust Invoiced Claim Reason frame allows you to create codes for use when adjusting an invoiced warranty claim.



# 2. Warranty Policy Configuration

M5 allows for the configuration of two different types of warranties:

1. OEM (Original Equipment Manufacturer)
    - Bumper to bumper
    - Sub-unit (Power Train, Body, Engine, Extended)
    - Parts
2. Replacement Parts

## OEM Configuration

### Warranty Tech Spec

You can set up warranties at the tech spec level using the Warranty Tech Spec frame. This allows you to group warranties together for units with the same tech specs. This will save time when entering warranties that are the same for a group of units. After the tech spec warranties are defined and the tech spec is applied to the unit, the warranty terms are carried down to the unit. Any changes to the terms of the warranty will not update at the unit level. Only new warranty terms applied at the tech spec level will then carry down to the unit. Any changes will need to be done at the unit warranty level.

On this frame you can define:

OEM Whole Unit Warranty – Bumper to bumper.

OEM Extended Warranties – Systems and assemblies.

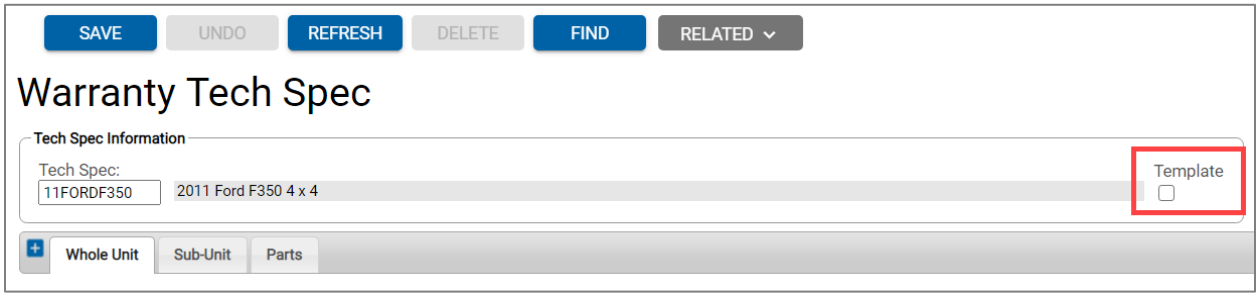
OEM Parts – Parts installed on the equipment at time of delivery.

All warranty processing happens at the unit level.

### Whole Unit tab

1. Open the Warranty Tech Spec frame.
2. Enter a valid technical specification number in the Tech Spec No. field or use the List of Values icon to select one.
3. Select the Whole Unit tab.
4. If the warranty information is specific to a particular vendor, enter the vendor number if the warranty information is valid for all vendors, leave the vendor number field blank. System Flag 1314 determines if the vendor field is required.
5. Enter the elapsed usage (miles, kilometers or hours) in the usage field and specify the usage unit of measure (miles, kilometers) in the ‘Meter Type' field.  This needs to match the MCC of the units assigned to this Tech Spec.
6. Enter in the elapsed time of the warranty, such as 10 years.

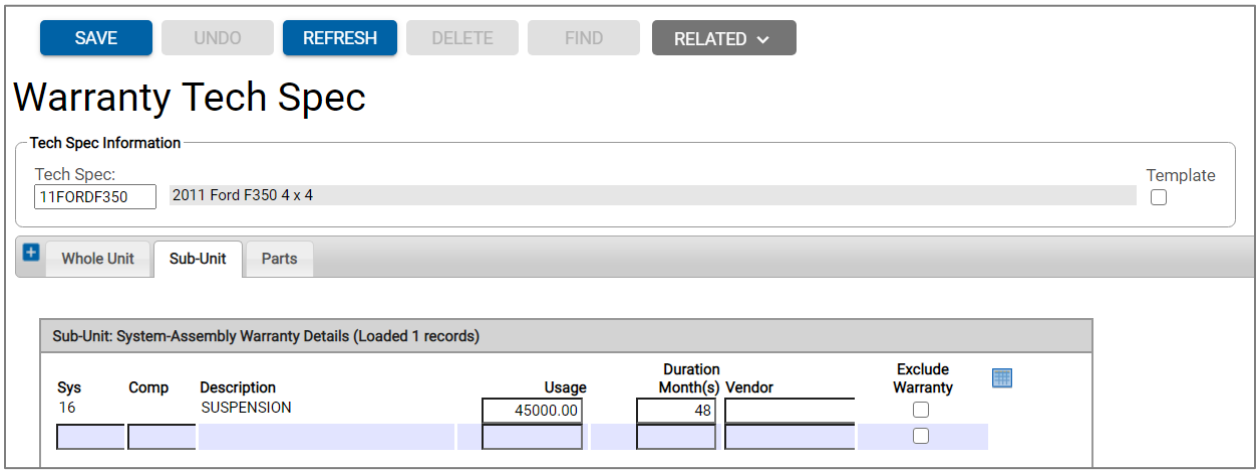
### Warranty Tech Spec Template




If you are using a tech spec warranty as a standard, then select the Template checkbox. Only users that have the privilege of UPD WARR TECH SPEC are authorized to update the template.

When using the Tech Spec Copy functionality and flagging the existing Warranty Tech Spec as a template, the checkbox on the new tech sec warranty will be clear as it is only a copy and will not default to a new Tech Spec warranty template.

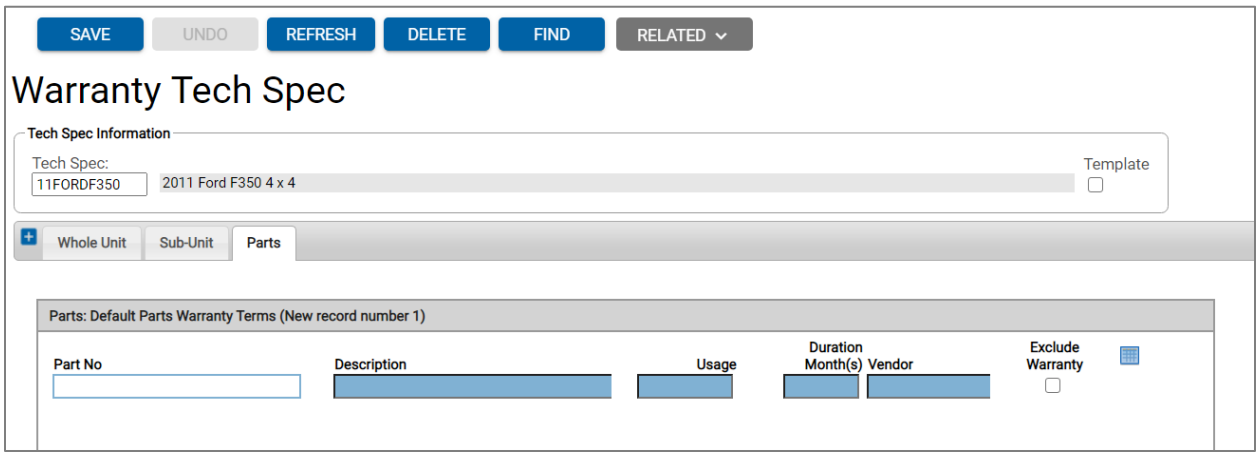
### Sub-Unit tab




As a practical matter, a system or system-assembly warranty with usage or time terms that are shorter than the whole unit warranty will never be used. But the whole-unit warranty will still be triggered. System and system-assembly warranties are useful only when they are longer than the whole-unit warranty. However, if System Flag 2140 is set to yes, M5 will check the Sub-Unit warranties first.

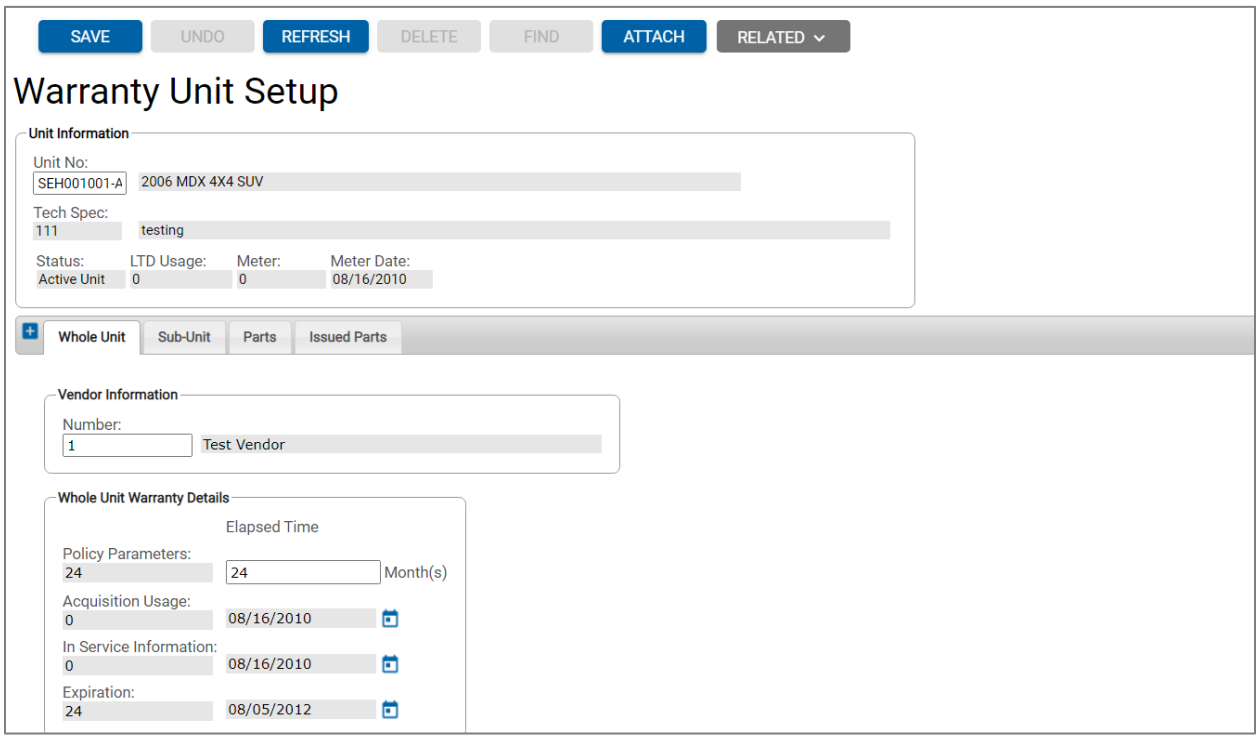
1. To enter extended system and assembly warranties, select the Sub-Unit tab.
2. Enter the System Code and Assembly (optional). The description will automatically populate.
3. Enter the usage and/or duration for the system/assembly warranty, and optionally a vendor.
4. A warranty might exclude certain items that are not covered by any warranty. The ‘Exclude Warranty?' checkbox flag indicates whether the system/assembly codes are exclusions from the whole unit warranty rather than additions to it. Rows flagged with "Exclude Warranty?" do not require usages or durations or vendors.

### Parts tab




1. To enter OEM Part warranties, select the Parts tab.
2. Enter the Part Number and the Description will automatically populate. Part must be marked as a warranty part on Part Main.
3. Enter the usage or duration for the part warranty, and optionally a vendor.
4. A warranty might exclude certain items that are not covered by any warranty. The ‘Exclude Warranty?' checkbox flag indicates whether the parts are exclusions from the whole unit warranty rather than additions to it. Rows flagged with "Exclude Warranty?" do not require usages or durations or vendors.
5. The default terms on the tech spec and unit are useful only if System Flag 2093 is set to “D”.

## Warranty Unit Setup

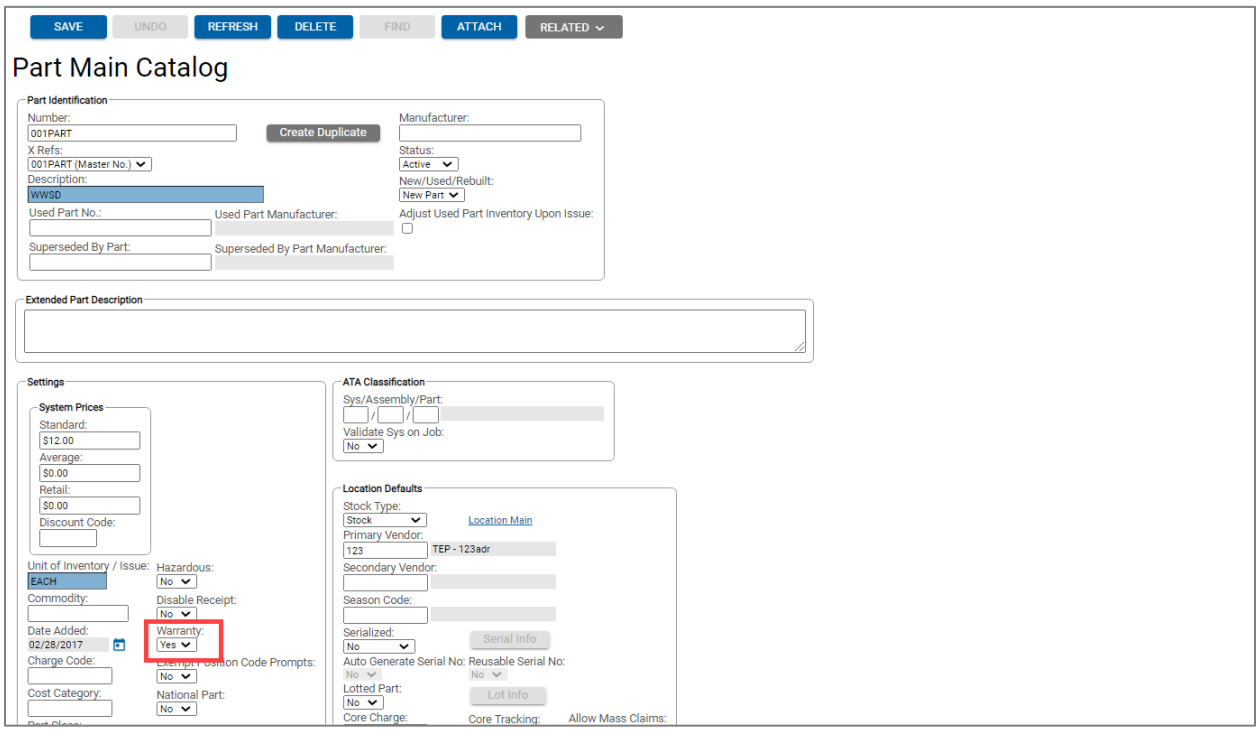



The Warranty Unit Setup frame displays the warranty terms defined at the tech spec level, expiration dates and mileages, and can be used to override the tech spec warranty. Users may add more sub-unit warranties, change the terms of the warranties that were copied from the tech spec, and change Warranty expiration, based on System Flags 1332 and 1333:

- Acquisition Date or In-Service Date.
- In-Service Date or Acquisition Meter.
- Expiration Date will display based on parameters entered.

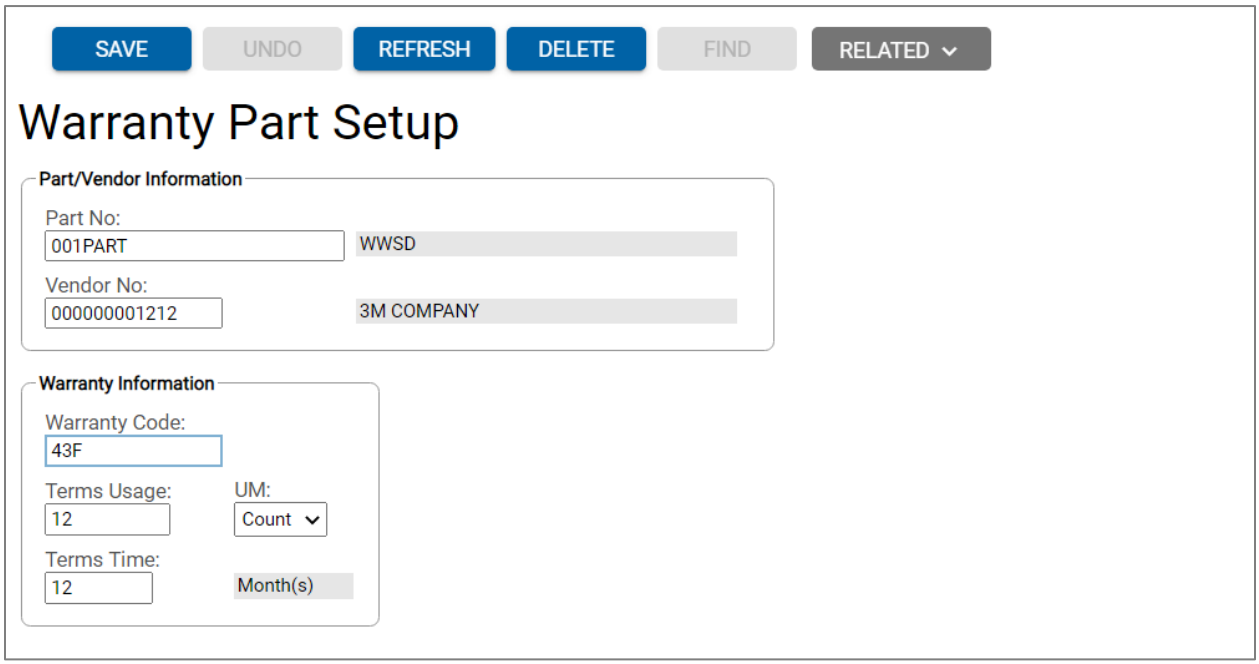
If part warranty terms are later deleted from the tech spec, M5 does not remove them from the tech spec's units; the units retain them.

## Replacement Part Warranty Configuration




To track replacement part warranties, parts must have the warranty flag set to yes on the Part Main Catalog. After the flag is set to Yes, the Warranty Part Setup frame displays.

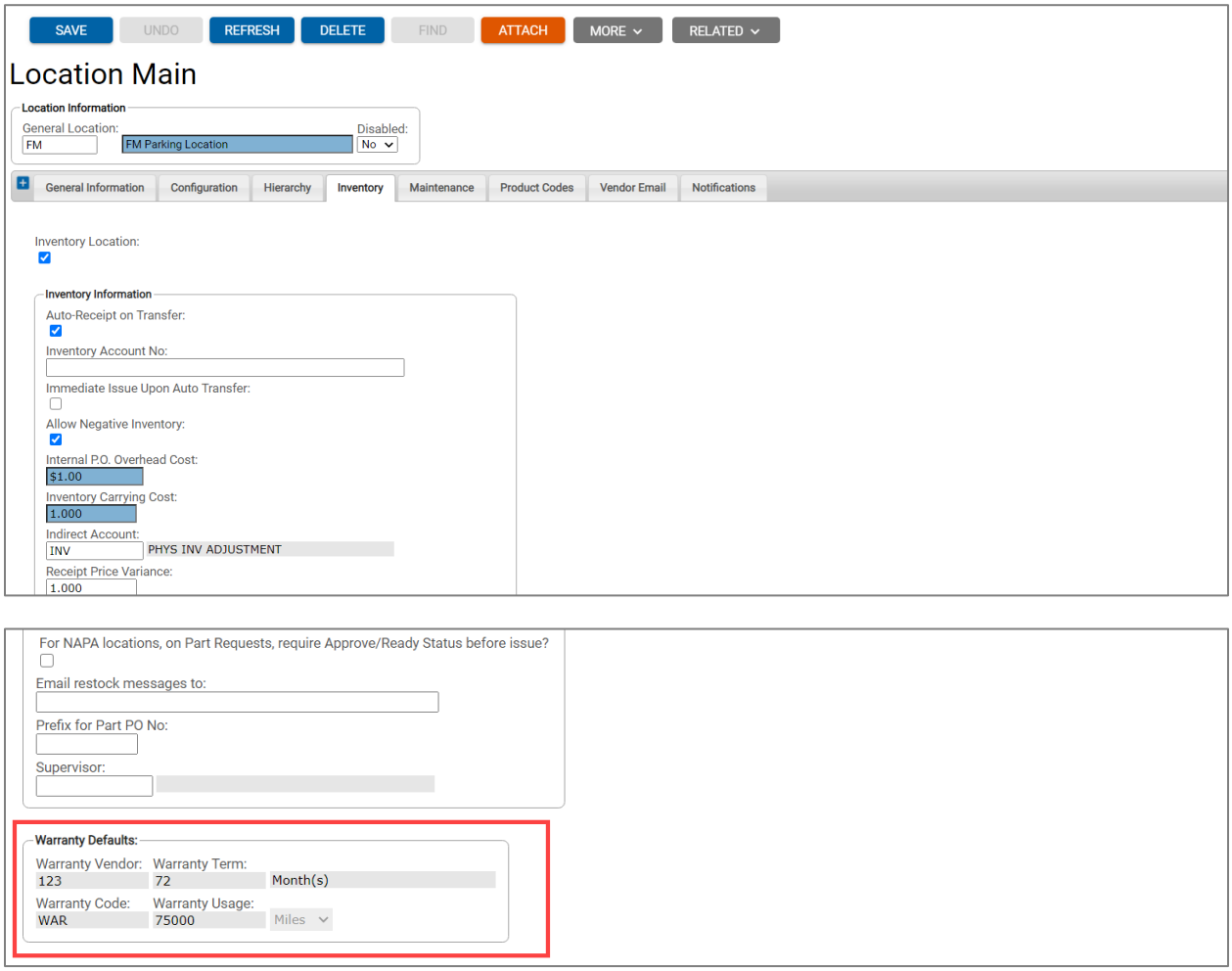
## Warranty Part Setup



The default terms can be created for a specific vendor (by entering a vendor) or generically for all other vendors (by leaving it blank). The user chooses the unit-of-measure. A “warranty code” can be entered but it is strictly informational and has no effect on the rest of the process.

The “Warranty Part Setup” frame can also be called a menu item. The default terms on the tech spec and unit are useful only if System Flag 2093 is set to “D”.

## Location Main







If System Flag 2093 (Use (L)ocation 1st Vend or last (R)eceived-From vend or (D)efault for warr terms) is set to “D”, then default terms for all stock parts can be set up on the “Inventory” tab at the bottom.

# 3. Warranty Part Issues

When a warrantied part is charged to a work order, the “clock starts” with the effective date of the issue and the life-to-date usage as of when the work order was opened.

System Flag 2093 determines the rules for the terms to be applied to the part warranty on the unit. The setting establishes three different search lists for the terms.

If System Flag 2093 is “L”, M5 uses the terms from the primary vendor on the location issuing the part. The default terms as set on the “Parts” table of the Warranty Tech Spec Setup and Warranty Unit Setup frames are ignored. Here is the search:

1. If the user entered a vendor’s cross-reference number, and the user created terms for that vendor in Warranty Part Setup, those terms are used.
2. Otherwise, the part’s inventory location’s primary vendor is looked up, and if the user created terms for that vendor in Warranty Part Setup, those terms are used.
3. Otherwise the generic terms, that is, those set up without a vendor from Warranty Part Setup are used.

If System Flag 2093 is “R”, M5 uses the terms from the last vendor to sell the part to the inventory location. The idea being that the user is probably issuing parts from that last receipt. The default terms as set on the “Parts” table of the Warranty Tech Spec Setup and Warranty Unit Setup frames are ignored. Here is the search:

1. If the user entered a vendor’s cross-reference number, and the user created terms for that vendor in Warranty Part Setup, those terms are used.
2. Otherwise, the vendor last received from is looked up, and if the user created terms for that vendor in Warranty Part Setup, those terms are used.
3. Otherwise the generic terms,  that is, those set up without a vendor from Warranty Part Setup are used.

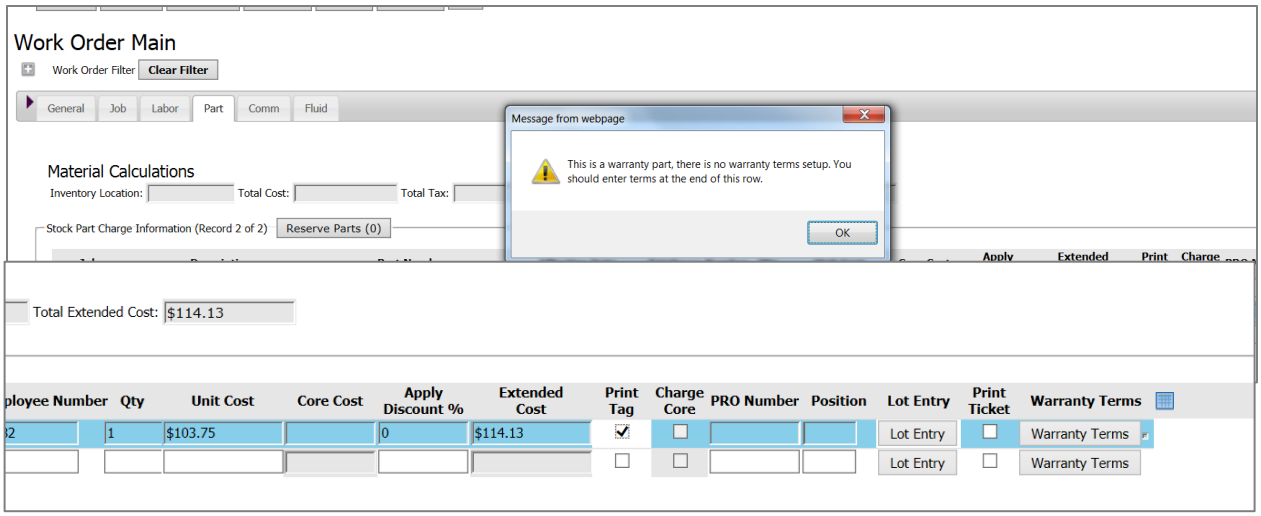
If System Flag 2093 is “D”, M5 uses the default terms set on Warranty Unit Setup. Here is the search:

1. If the user entered a vendor’s cross-reference number, and Warranty Unit Setup includes terms for that part and vendor, those terms are used.
2. Otherwise, if Warranty Unit Setup includes terms for the part with the vendor left blank, those terms are used.
3. Otherwise, if the user entered a vendor’s cross-reference number, and Warranty Tech Spec Setup includes terms for that part and vendor, those terms are used.

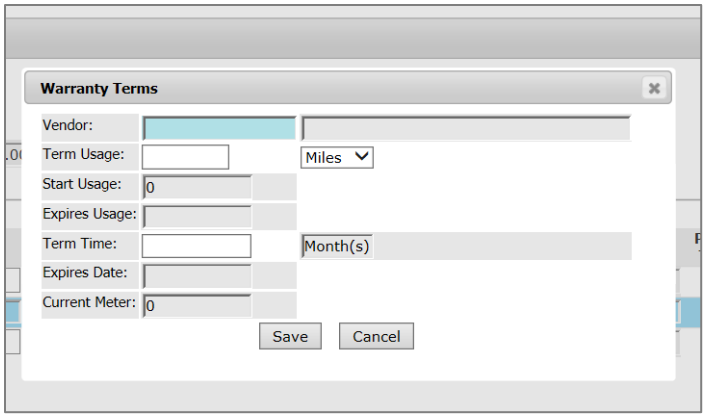
4. Otherwise, if Warranty Tech Spec Setup includes terms for the part with the vendor left blank, those terms are used.
5. Otherwise, if the user entered a vendor's cross-reference number, and the user created terms for that vendor in Warranty Part Setup, those terms are used.
6. Otherwise, the vendor last received from is looked up, and if the user created terms for that vendor in Warranty Part Setup, those terms are used.
7. Otherwise, if it is a stock part, the inventory location defaults are used as set on Location Main, provided neither Warranty Unit Setup nor Warranty Tech Spec setup says that the part is excluded from warranty.

⚠ However, a default time term found from steps 1 - 4 is not used if it would be expired had the part been installed when the unit was new. Say the default term is found in step 1, it is one year, and System Flag 1332 says to use the in-service date as the starting point for whole-unit and system-assembly warranties. After the unit is in service for one year, the default term from step 1 will not be used and the search will continue. Default usage terms, however, will be applied regardless of how long the unit has been in service.

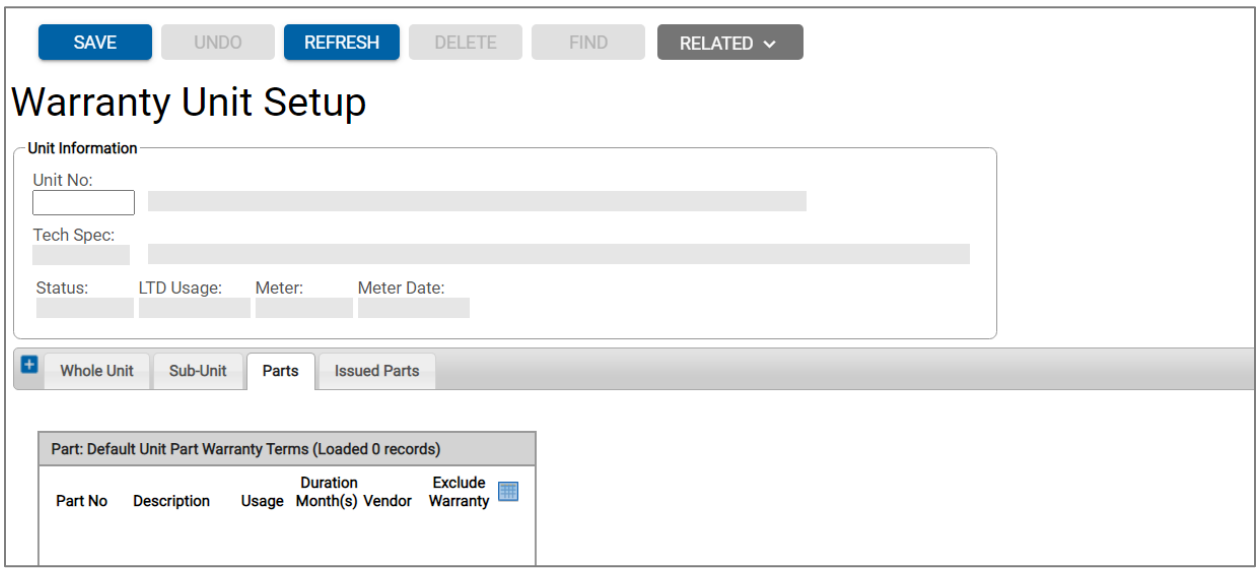
When issuing a part where the part warranty has not been defined, a pop-up appears.




By selecting the Warranty Terms button on the far-right end of the "Part" tab on Work Order Main, when selected, a large block appears so that the user can manually enter terms. The terms as seen in the pop-up are blank, that is, they do not default to the terms found in the search lists above (in fact, at this point the search has not yet been done). After entry, a "Close" button in the block saves the terms.




After applied, the part warranties can be viewed on Warranty Unit Setup “Issued Parts” tab. The terms may be changed there, and a “Note” icon can be used to save additional notes about the warranty.

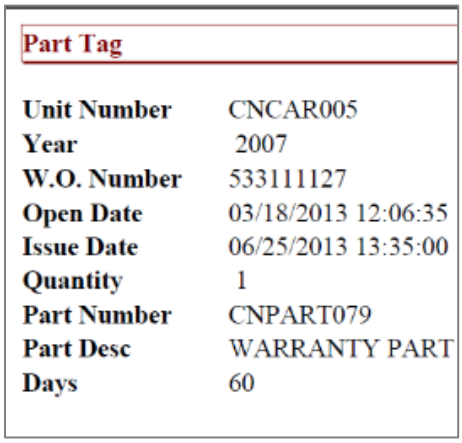



# Print Part Tags

To track parts removed from units that are either under warranty or contain a core and must be sent back to the vendor, a parts tag can be printed from Work Order Main using an icon for selected rows in the part tab i-frame. A new column in the part tab i-frame will automatically be selected for those parts being replaced that are under warranty.

If users want you to print a part tag for any other reason, then you must select the print tag checkbox on the part row then select the part tag print icon on the navigation bar. System Flag 5191 determines the number of days to retain tagged warranty parts.

The part tag is designed with output as large font to be printed from regular printers on 8 1/2 X 11 size paper then taped to the part. The data on the part tag includes: Unit Number, Year, WO Number, Open Date, Issue Date, Issue Date, Quantity, Part Number, Part Description, and Days.



**Part Tag**

| | |
|---|---|
| **Unit Number** | CNCAR005 |
| **Year** | 2007 |
| **W.O. Number** | 533111127 |
| **Open Date** | 03/18/2013 12:06:35 |
| **Issue Date** | 06/25/2013 13:35:00 |
| **Quantity** | 1 |
| **Part Number** | CNPART079 |
| **Part Desc** | WARRANTY PART |
| **Days** | 60 |

# 4. Warranty Violations

Flagging of warranty violations occurs during work order processing. The warranty violations can be triggered by using the warranty setup process or manually initiated on the work order.

The system attempts to flag valid warranty violations to enable warranty claims to be generated from open, completed, or closed work orders based on what has been set up in M5. Specifically, the coding choices made in:

- System Flags
- Work Accomplished Codes
- Job Reasons
- Whole Unit Warranty
- Extended System and Component Warranty (System Flag 2140 = Y, will check before Whole Unit)
- OEM Parts
- After Market (Replacement) Part Warranty

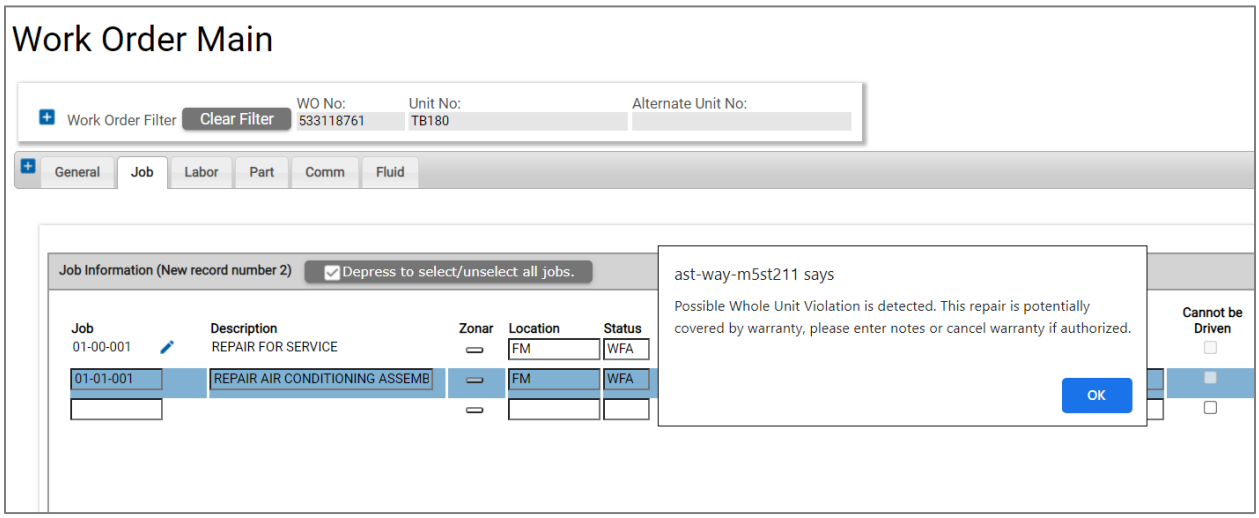
M5 flags a few different types of warranty violations:

- A whole unit violation triggered from data on the Warranty Unit Setup frame.
- An extended system/component violation triggered from data on the Warranty Unit Setup frame.
- A part warranty violation triggered from data on the Warranty Unit Setup frame.

⚠ Remember: Warranty violations can be excluded based on the setup of work accomplished codes and job reasons.

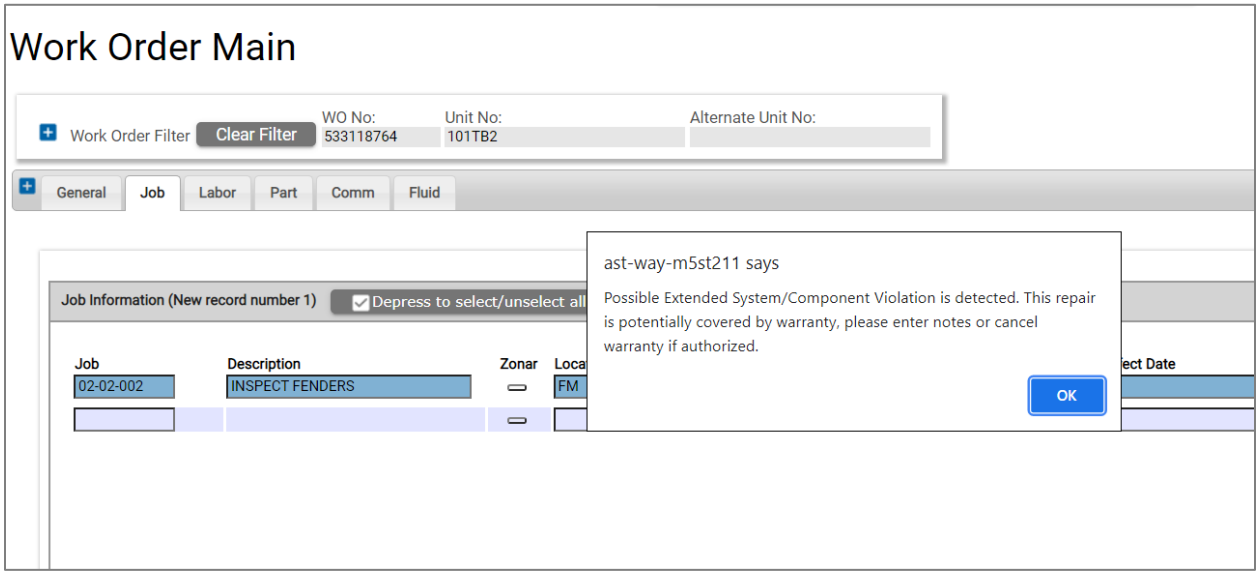
# Whole Unit Warranty Violation

Adding a job and job reason to the work order triggers the processing for checking for warranty violations. If there are no exclusions because of work accomplished codes or job visit reasons and there is a whole unit warranty in effect, this message pop-ups after the job and reason have been entered.




# Extended System Violation

The same processing check applies for extended system violations. If there are no exclusions because of work accomplished codes or job visit reasons and there is not a whole unit warranty in effect, this message pop-ups after the job and reason have been entered.



# Part Warranty Violation

Compared to whole-unit and system-assembly rules, part warranty rules are simple: if the same part is issued to the unit within the part warranty terms, the job is not already flagged as a violation, no job reason exclusion applies, and no work accomplished code exclusion applies, then a violation is said to occur on the part and on the job.

In addition, System Flag 1317 expands the concept of “same part”. If the flag is set to “Y”, then parts are considered to be the same if the Part Main Catalog says that the already-issued part and the newly issued part share the same ATA/VMRS system, assembly, and part. All three levels are required. In this way, superseding parts will violate the terms of their predecessors.

Parts issued with warranties are displayed on Warranty Unit Setup frame. Please note System Flag 5096 - Restart Part Warranty Terms on Issued Parts? (Y or N) determines if the part warranty on the replacement part has a new part warranty or is an extension of the part that was replaced.

# Changing Job Reason

If the job reason is changed to a ‘warranty flagged’ job reason, the following will display:

After the user selects OK, then the job line will have the “Warr Violation” flag selected and display-only even if the unit does not have any warranty terms or the WAC is to ignore warranty terms.

## Manual Flagging of Warranty Violation

In addition to referring to the terms, a user can manually flag a job as a warranty violation by selecting the “Warr Violation” column on Work Order Main. After saved, however, a violation cannot be undone.

## A Quick Word on Warranty Notes

System Flags 2066 and 2067 determine if the user will have to enter notes before completing the WO. Any notes entered will be displayed on the Warranty Claim. Cancelled warranty notes icon is red, whereas normal warranty notes are designated in yellow.

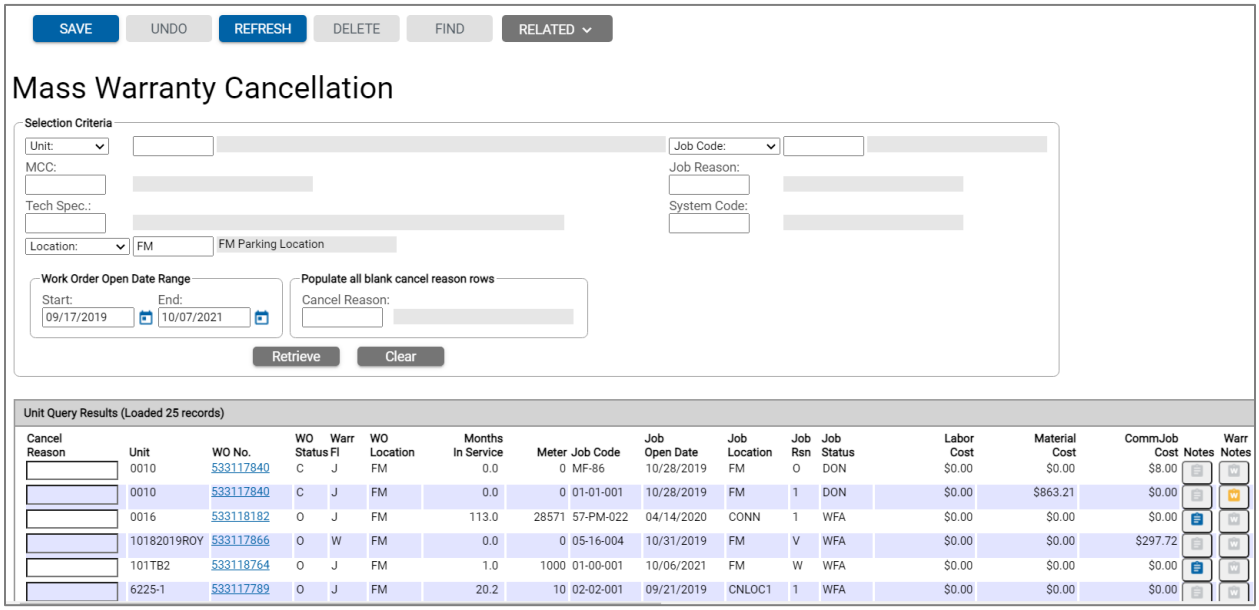
# 5. Warranty Cancellation

A warranty may be cancelled when a job is flagged as a violation on the work order. The user may cancel a warranty on the job by selecting the Warr Notes icon. System Flag 5066 - Validate warranty cancellation reason determines if the cancellation code must be valid.

After selecting the icon, the user needs to select the radio button for “Cancel the Warranty.” The user must have the “WARR CANCELLATION” privilege assigned to their role to proceed with cancelling. After selecting the radio button, the user must enter their username and password as well as a valid reason code (Warranty Cancellation Code).

If the user does not have the privilege of “WARR CANCELLATION”, when they enter their user id and password, they will receive an error message informing them they are not authorized to cancel the warranty.

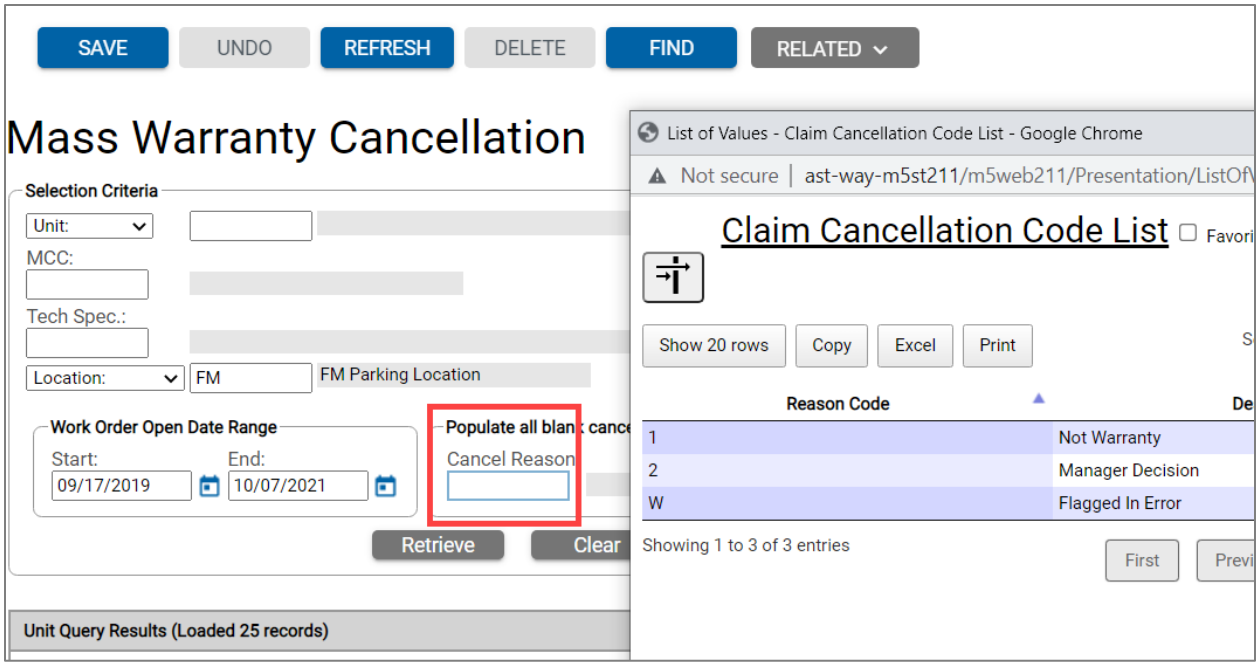
## Mass Warranty Cancellation



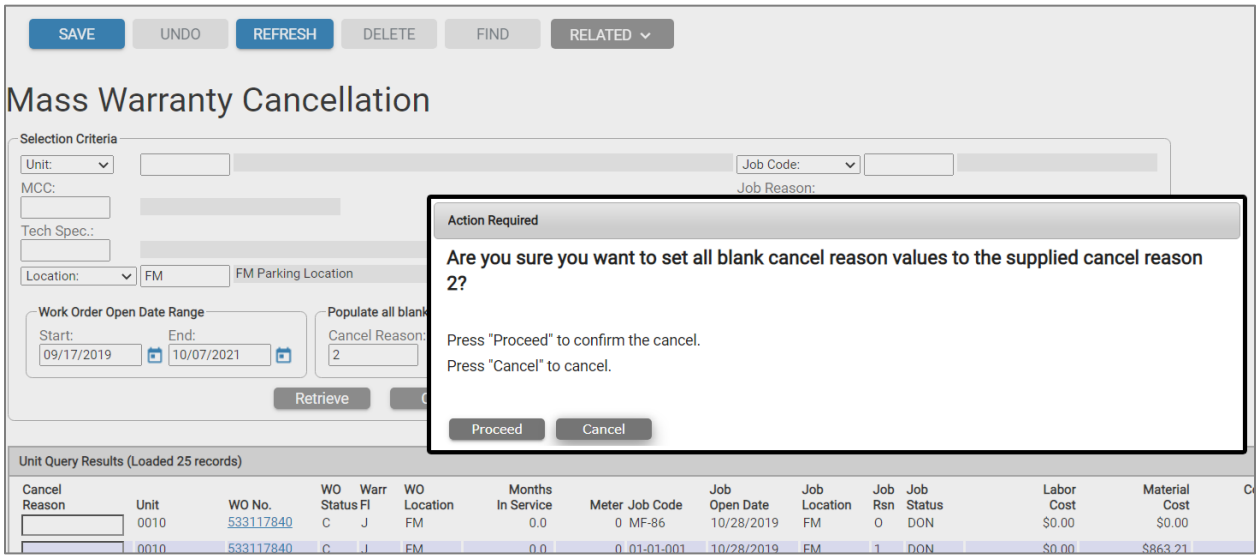

In addition to cancelling a warranty at the job level on a work order, the user can use the Mass Warranty Cancellation frame to cancel multiple jobs flagged as warranty at one time. The Mass Warranty Cancellation frame requires the user to enter the cancellation reason code, either per each job line, or populate each job line with the same cancellation reason.

You have different options on this frame as to how you would like to query warranty jobs for cancellation. Some of the options include searching by the unit number, job code, mcc, tech spec, and location. An open date range for work orders can be specified as well.

To populate all the rows with the same reason, the List of Values can be used to select a valid Claim Cancellation Code reason in the Populate all blank Cancel Reason field.




After a reason is selected, a pop-up message appears. To set all the blank cancel reason values to the same reason, select the proceed button.




The same reason will be populated on all the lines selected.

If a different cancellation reason is required for each job line, use the List of Values (LoV) and select the reason for each line. If the user does not have the privilege of “WARR CANCELLATION”, the Cancel Reason field on each line is greyed out.

# 6. Warranty Claims

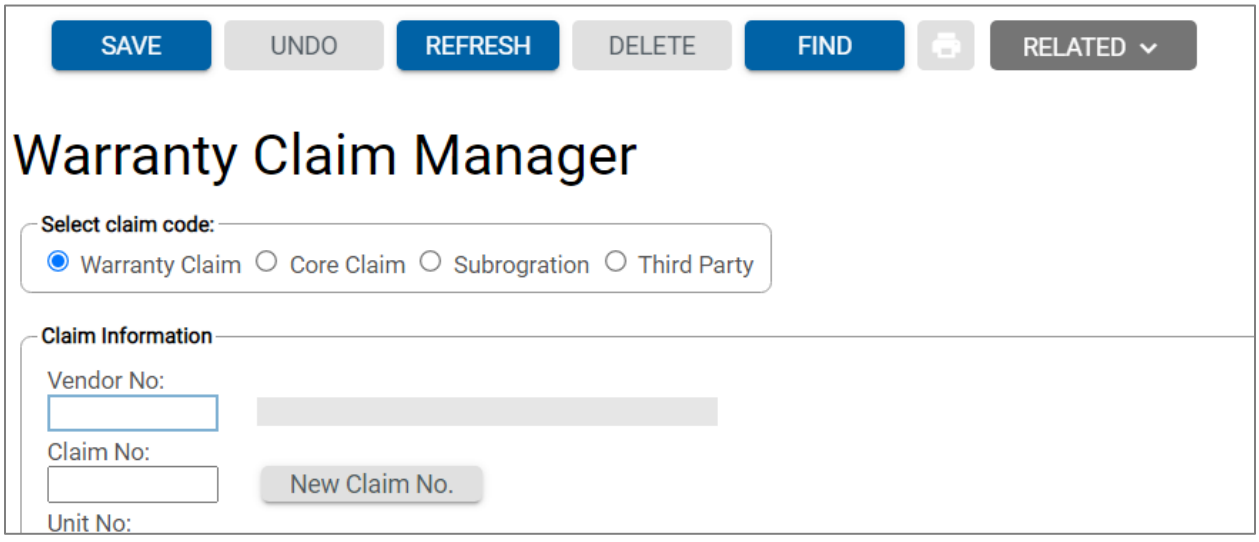
Warranty claims can be processed through the M5 functionality.

If the customer chooses to process the warranty claim within M5, they will use the Warranty Claim Manager frame. Each warranty claim has several statuses:

- Build – Select jobs to claim.
- Negotiate – Enter amounts to claim.
- Authorize – Enter agreed amounts.
- Cancel – Close claim submitted to vendor.
- Denied – Vendor refuses the claim.
- Invoice – Applies credit to work order as negative commercial charges.

This enables the customer to track the status of each claim throughout its processing.

There are two additional role privileges to be aware of: **CREATE SUBRO CLAIM** and **CREATE 3RD PARTY CLM**. If the user has either of these privileges, they will then be able to select the corresponding radio button to indicate if the warranty is in subrogation or is a warranty claim with a third party.

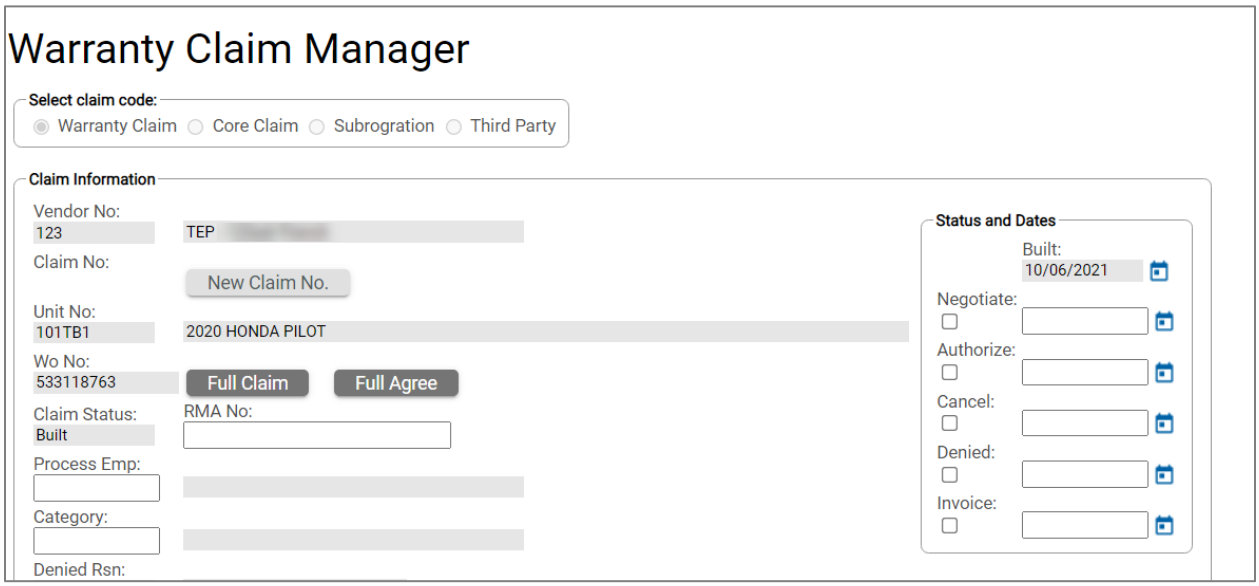



Only one of the claim code radio buttons can be selected at any one time. If the user should only have one of the ‘warranty’ privileges, the Warranty Claim Manager will default to that privilege. As shown below, the user only has the CREATE SUBRO CLAIM privilege.

If the user has the CREATE WARR CLAIM privilege along with one of the only new ‘warranty’ privileges, the Warranty Claim Manager will default to be a ‘warranty claim’.

# Build Process

To start a new Warranty Claim process, enter the vendor, select the new claim no. button. System Flag 5093 determines if M5 will automatically create a new claim number. Use the list of values to select the work order that contains the charges that are being claimed. If there are other claims against the work order a pop-up message will appear. To continue, select the continue button, otherwise, select the cancel button.

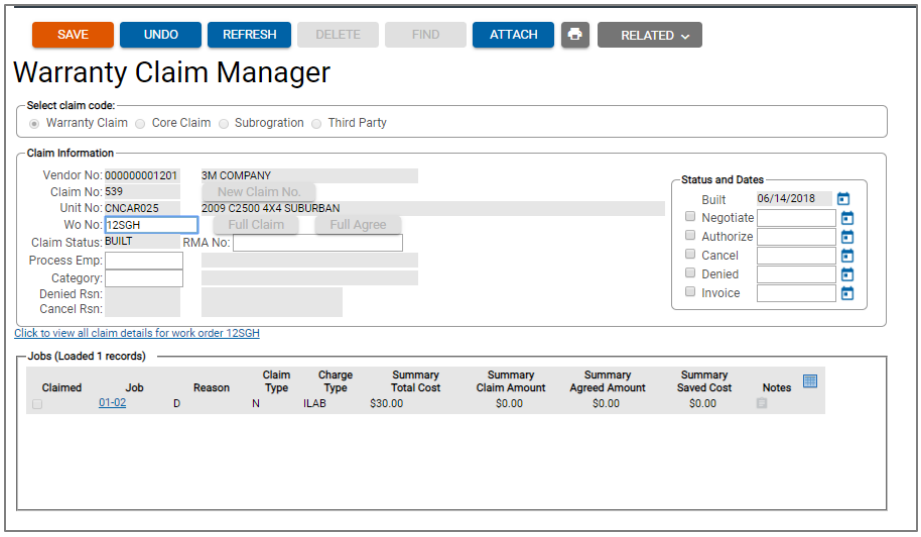



The status is now in Build. System Flag 5114 determines if the warranty processing level is summary or detail.

Detailed level lists every charge and the summary – Summarizes costs by costs type such as ILAB. When System Flag 5114 set to "D" the summary frame will be read-only.

The claim amount will be entered from detail frame. The claim amount and agreed amount will be entered by the user or the user can use the button to place the total job charges as FULL CLAIM and/or FULL AGREE.

If System Flag 5098 - Require Employee Number from the Warranty Claim Manager is set to yes, a valid employee number must be entered in the Process Emp. Field. Use the List of Values to select one.




If System Flag 5257 – Enforce Category on Warranty Claim Manager is set to Y, a valid warranty claim type is required.

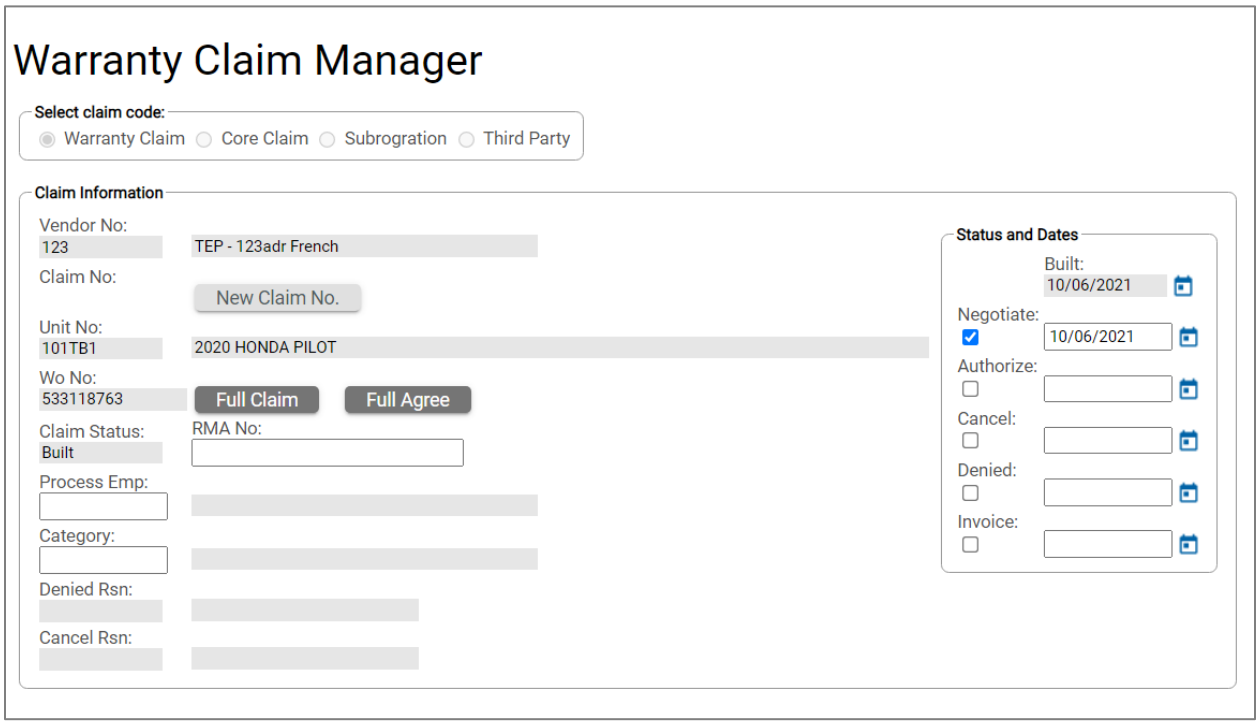
During the build process, there are 6 different charge types that can be claimed:

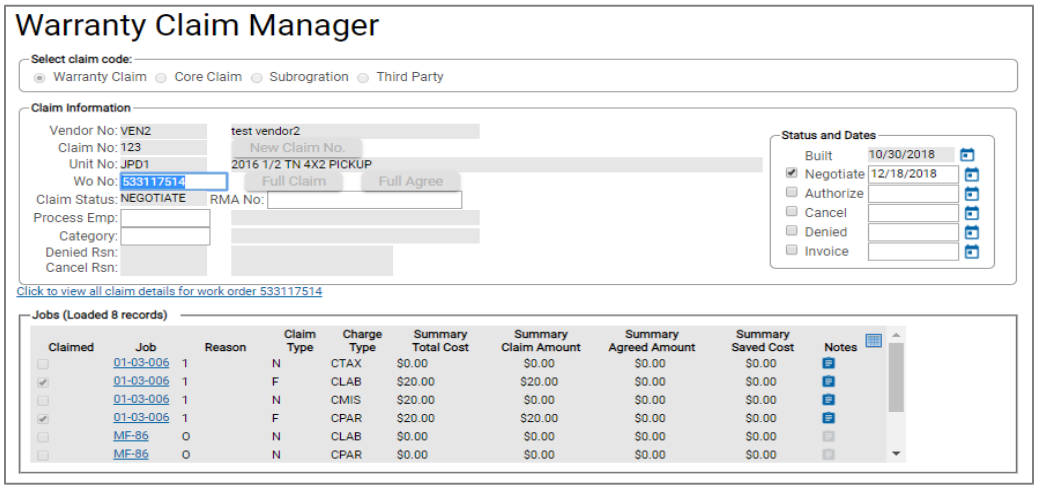
- ILAB – Work order labor charge
- IPAR – Work order part charge
- CPAR – Commercial part charge
- CMIS – Commercial misc. charge
- CTAX – Commercial tax charge
- CLAB – Commercial labor charge

The claim details can be viewed by using the view all claim details hyperlink in read-only mode. The Claim Type indicates type of claim:  N – None; P – Partial; or F – Full.

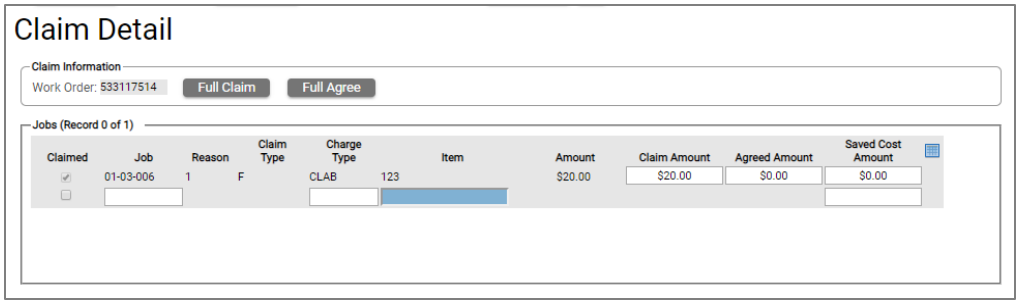
# Negotiation Status

After there is an ongoing discussion with the manufacturer regarding this warranty claim, the claim's status is changed to negotiate and updated with the date.



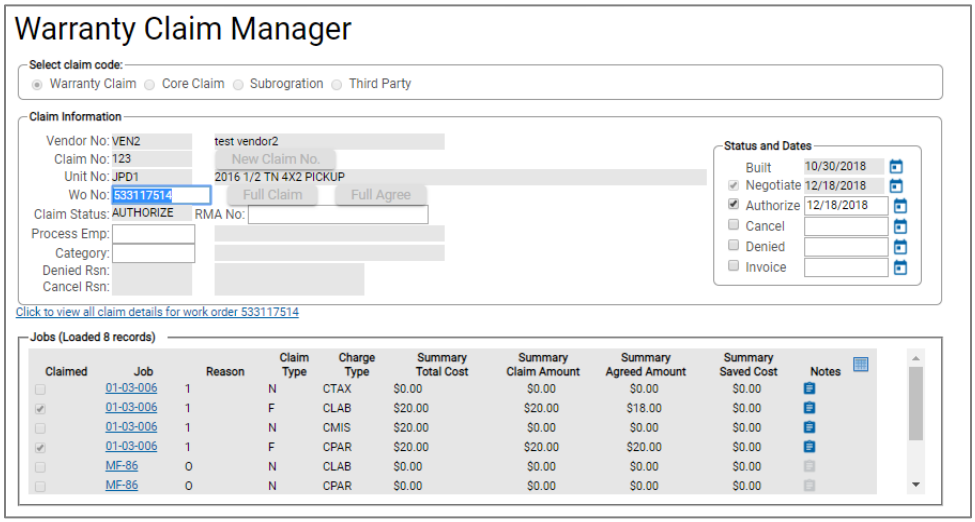

The job code hyperlink is used to enter the claim amount and agreed amount.




The Warranty Claim Manager updates the Claimed checkbox.

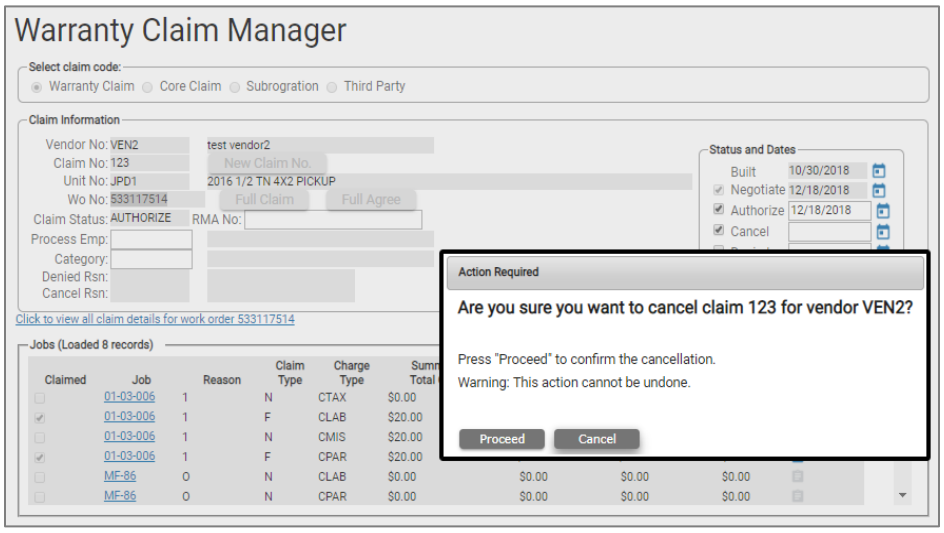
# Authorize a Claim

After the negotiation with the manufacturer, the amount that agreed upon or authorized is entered on the warranty claim and the status is changed to Authorized with the date.

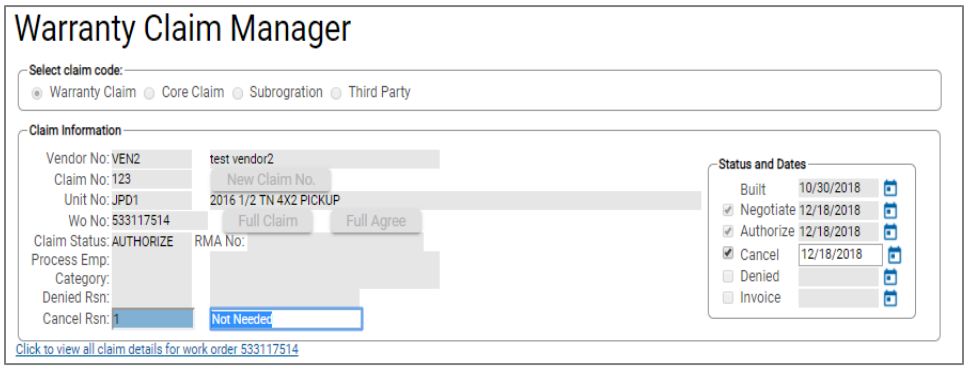


# Cancel a Claim

You can cancel a claim by selecting the ‘Cancel’ status checkbox. A pop-up will appear asking you to confirm the action. If the claim is to be canceled, select the proceed button and save the transaction.

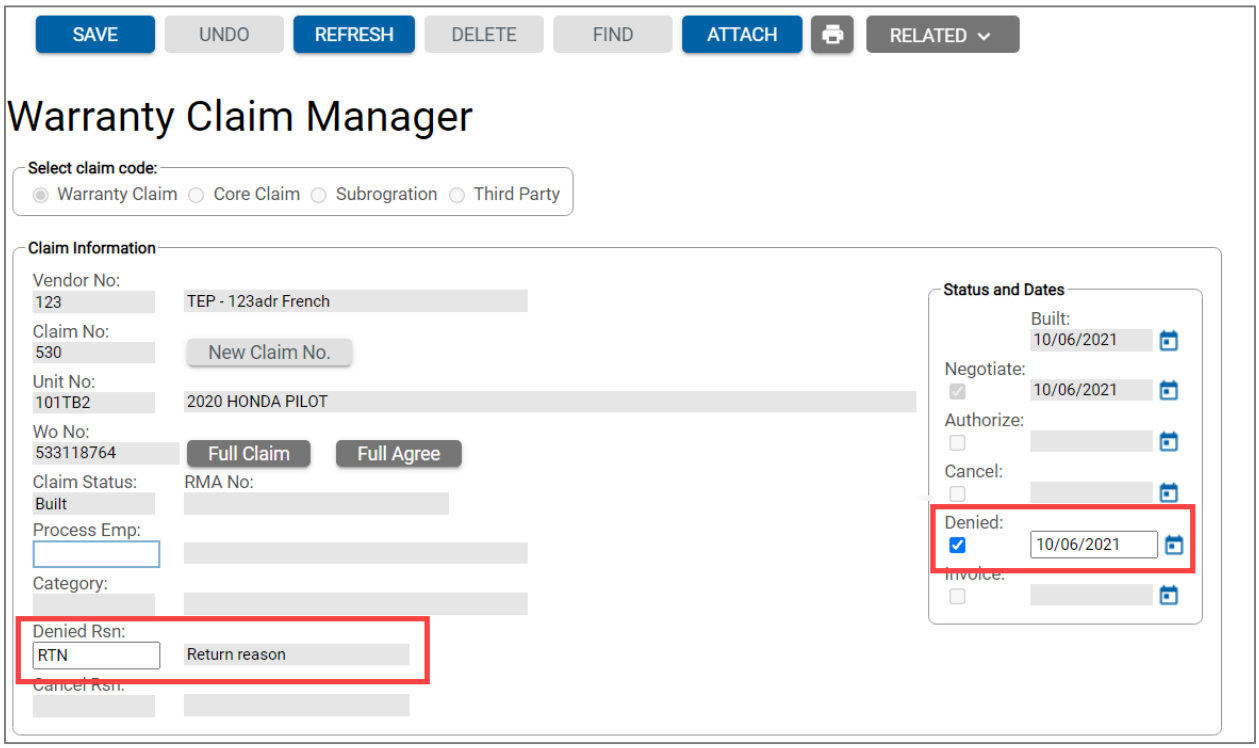



You must enter a Cancel Reason code. Use the List of Values to select a valid cancellation reason.



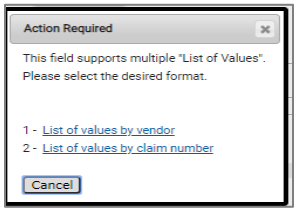
# Denied Claim

A claim can be denied by the vendor. The Denied checkbox is selected, and a denied reason must be entered. The List of Values can be used to select a valid denied reason.



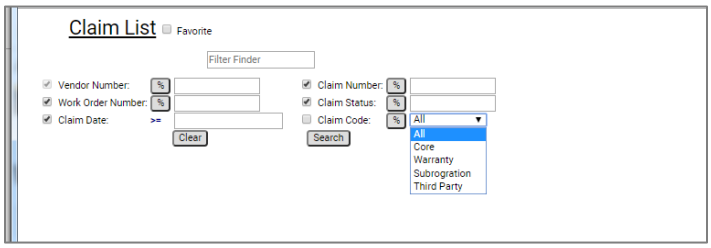

# Look Up Existing Claims

To review or modify an existing claim, the user can double-click in the vendor no. field which displays the following pop-up.

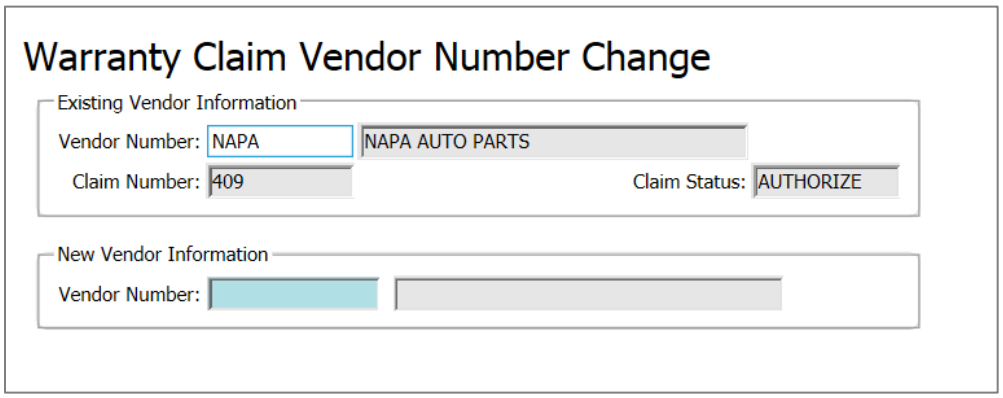



The List of values by vendor hyperlink would be selected if created a warranty claim for the first time. List of values by claim number hyperlink would be selected to view of modify an existing warranty claim.

After the LOV displays, it displays all warranty claims. Select the to see the filters. Select the dropdown to select which claim code and/or claim status to be displayed.




## Change the Warranty Vendor

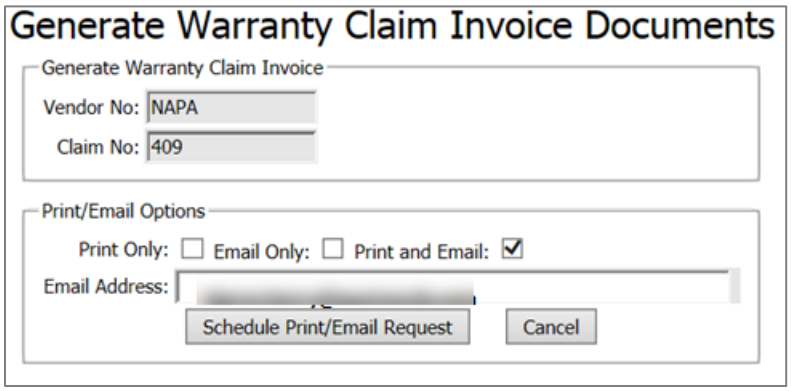



The vendor on a warranty can be changed by using the Warranty Claim Vendor Number Change frame.

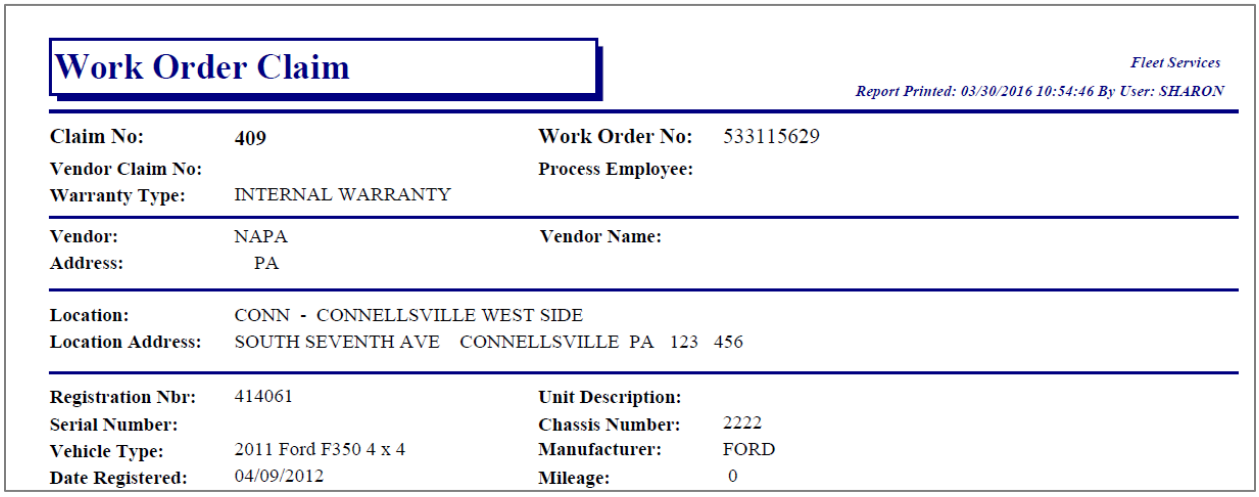
The vendor number and claim number to be changed are entered on this frame. The Claim Status is displayed. Use the List of Values to select another vendor number. Then save the transaction.

# Generating Warranty Claim Invoice Documents

The Warranty Claim Manager frame allows the user to email the warranty invoice report (as defined in report options) directly to the vendor to which the claim was created. The ability to email a warranty claim invoice report to the default vendor email address or to a specified email address has been added. The default option is print only. Other valid options are email only or print and email.




To schedule the print/email, select the Schedule Print/Email Request. The following is a sample of the standard Work Order Claim Invoice.



**Work Order Claim**

*Fleet Services*

*Report Printed: 03/30/2016 10:54:46 By User: SHARON*

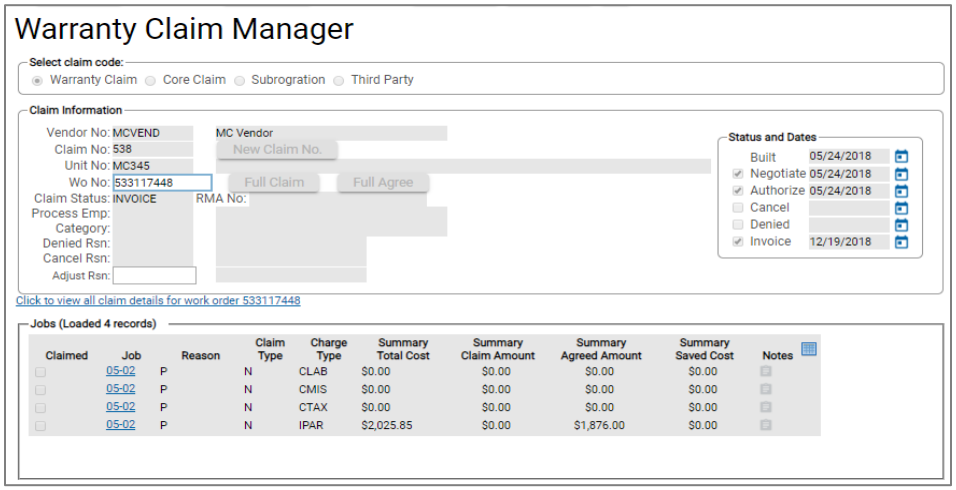
| | | | |
|---|---|---|---|
| **Claim No:** | **409** | **Work Order No:** | 533115629 |
| **Vendor Claim No:** | | **Process Employee:** | |
| **Warranty Type:** | INTERNAL WARRANTY | | |
| **Vendor:** | NAPA | **Vendor Name:** | |
| **Address:** | PA | | |
| **Location:** | CONN - CONNELLSVILLE WEST SIDE | | |
| **Location Address:** | SOUTH SEVENTH AVE CONNELLSVILLE PA 123 456 | | |
| **Registration Nbr:** | 414061 | **Unit Description:** | |
| **Serial Number:** | | **Chassis Number:** | 2222 |
| **Vehicle Type:** | 2011 Ford F350 4 x 4 | **Manufacturer:** | FORD |
| **Date Registered:** | 04/09/2012 | **Mileage:** | 0 |

# 7. Claim Credit

When the warranty claim dollars are received, it is important to update the warranty claim.

When the invoice dollars are entered on the claim, the credit for the warranty dollars are credited to the work order as a commercial charge.

No further changes can be made to the warranty claim unless you enter an Adjustment Reason. If a Return Material Authorization number is required by the vendor when returning warrantied parts, it can be entered in the RMA field. The Invoice checkbox is updated with the date.




## Work Order Main – Commercial Tab

To see the credits navigate to the Work Order Main – Commercial Tab. The Ref No/Contract No will be the Warranty Claim No.

## Work Order Commercial Charge Query

You can also navigate to the Work Order Query frame and double-click on the Query Results to see the details.

## Adjust Invoice Amount

If you need to make an adjustment to the invoice amount, enter a valid Adjust Invoiced Claim Reason. Use the List of Values to select one.

# 8. Additional Information

## Interface

Care should be taken when running this interface as all Unit level data will be overwritten by the Tech Spec terms. If unit level warranties have been added in addition to those at the tech spec level, they will be deleted as part of the interface.

The M5-STD-UNITWARR-UPDATE interface is a standard interface that will select tech spec warranties based on the given parameters and will push the warranty terms for the Whole Unit, Sub-Unit and Part Warranties down to the unit level for the units assigned to these tech specs.

You can set up parameters to specify that any or all the Whole Unit, Sub-Unit and or Parts warranties are affected. This can eliminate specific units or ranges of units based on Unit number and/or VIN.

The purpose of this interface is to read the terms of a tech spec warranty and push any changes, including updates and deletions down to the unit level.

This interface is run from the Interface Manger frame.

**Parameters**

| Parameter | Description |
|---|---|
| LAST RUN DATE | Date the I/F was last run - no need to fill in, will be populated after each run. |
| EMAIL TO | Internet-style email address of the person/group to receive an email upon completion of the interface. |
| INCLUDE TECH SPEC FROM | A valid M5 Tech Spec. Leave the next parameter blank, if only a specific Tech Spec is to be selected. If this parameter and the following one are left blank, all Tech spec warranties will be updated. |
| INCLUDE TECH SPEC TO | A valid M5 Tech Spec. If entered and above is valued, the program will select where spec_no between the value in INCLUDE TECH SPEC FROM and the value in INCLUDE TECH SPEC TO. |
| EXCLUDE UNIT NUMBER FROM | A valid M5 Unit Number. Leave the next parameter blank, if only a specific Unit Number is to be excluded from the update. |
| EXCLUDE UNIT NUMBER TO | A valid M5 Unit Number. If entered and the above is valued, the program will select where unit_no is NOT between the value in EXCLUDE UNIT NUMBER FROM and the value in EXCLUDE UNIT NUMBER TO. |

| Parameter | Description |
|---|---|
| EXCLUDE VIN FROM | A valid M5 Serial Number. Leave the next parameter blank, if only a specific VIN number is to be excluded from the update. |
| EXCLUDE VIN TO | A valid M5 Serial Number. If entered and the above is valued, the program will select where serial_no is NOT between the in EXCLUDE VIN FROM and the value in EXCLUDE VIN TO. |
| EXCLUDE WHOLE WARRANTY | Y or N. If N, changes to terms on the Tech Spec Whole Warranty will be pushed down the Unit Whole Warranty level. If Y, Unit Whole Warranty terms will not be updated. |
| EXCLUDE SUB-UNIT WARRANTY | Y or N. If N, changes to terms on the Tech Spec Sub-Unit Warranty will be pushed down to the Unit Sub-Unit Warranty level. If Y, Unit Sub-Unit Warranty terms will not be updated. |
| EXCLUDE PART WARRANTY | Y or N. If N changes to terms on the Tech Spec Part Warranty will be pushed down to the Unit Part Warranty level. If Y, Unit Part Warranty will not be updated. |

# System Flags

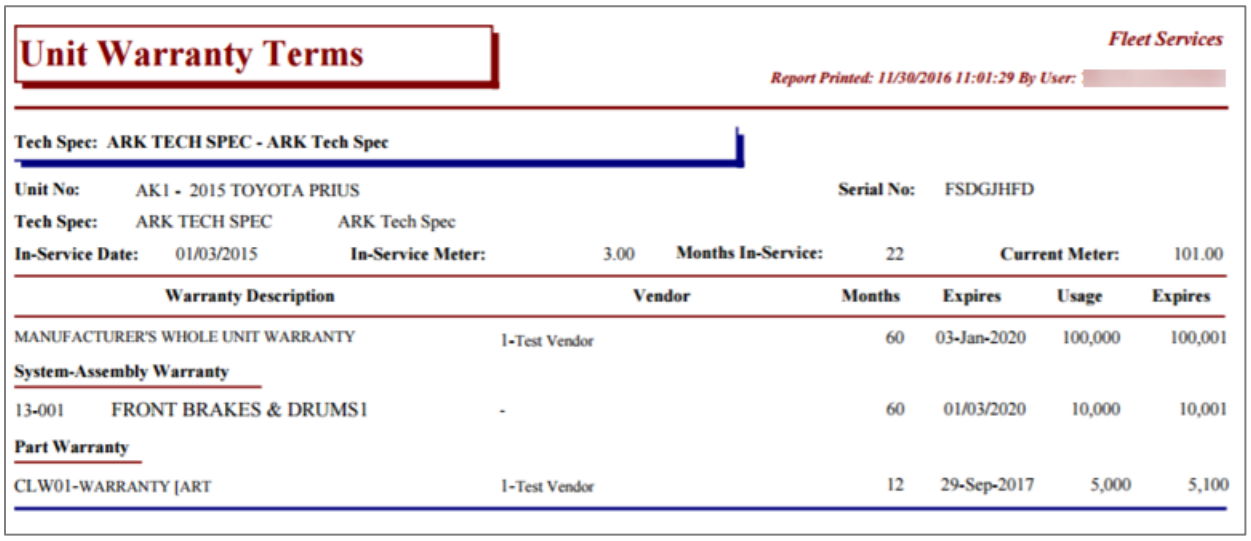
Please refer to the *System Flags Table* guide for a complete listing of system flags.

# Reports

There are several standard reports available in M5 that can be used to report on warranty terms and warranty violations.

## Unit Warranty Terms

The Unit Warranty Terms Report is a listing by unit that shows the warranty terms for the whole unit, the system-assembly and the parts. It includes the vendor, the unit serial number, tech spec, in-service details and the current meter reading.



**Unit Warranty Terms**

*Fleet Services*

*Report Printed: 11/30/2016 11:01:29 By User:*

**Tech Spec: ARK TECH SPEC - ARK Tech Spec**

**Unit No:** AK1 - 2015 TOYOTA PRIUS **Serial No:** FSDGJHFD

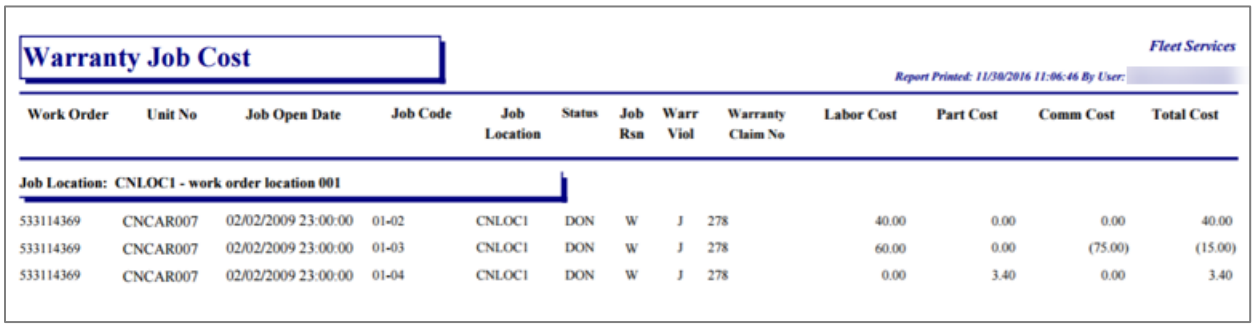
**Tech Spec:** ARK TECH SPEC ARK Tech Spec

**In-Service Date:** 01/03/2015 **In-Service Meter:** 3.00 **Months In-Service:** 22 **Current Meter:** 101.00

| Warranty Description | Vendor | Months | Expires | Usage | Expires |
|---|---|---|---|---|---|
| MANUFACTURER'S WHOLE UNIT WARRANTY | 1-Test Vendor | 60 | 03-Jan-2020 | 100,000 | 100,001 |
| **System-Assembly Warranty** | | | | | |
| 13-001 FRONT BRAKES & DRUMS1 | - | 60 | 01/03/2020 | 10,000 | 10,001 |
| **Part Warranty** | | | | | |
| CLW01-WARRANTY [ART | 1-Test Vendor | 12 | 29-Sep-2017 | 5,000 | 5,100 |

## Warranty Job Costs

The Warranty Job Costs report is a list of warranty job costs by job location. It lists the work order number, unit number the job open date and costs of the warranty job.



**Warranty Job Cost**

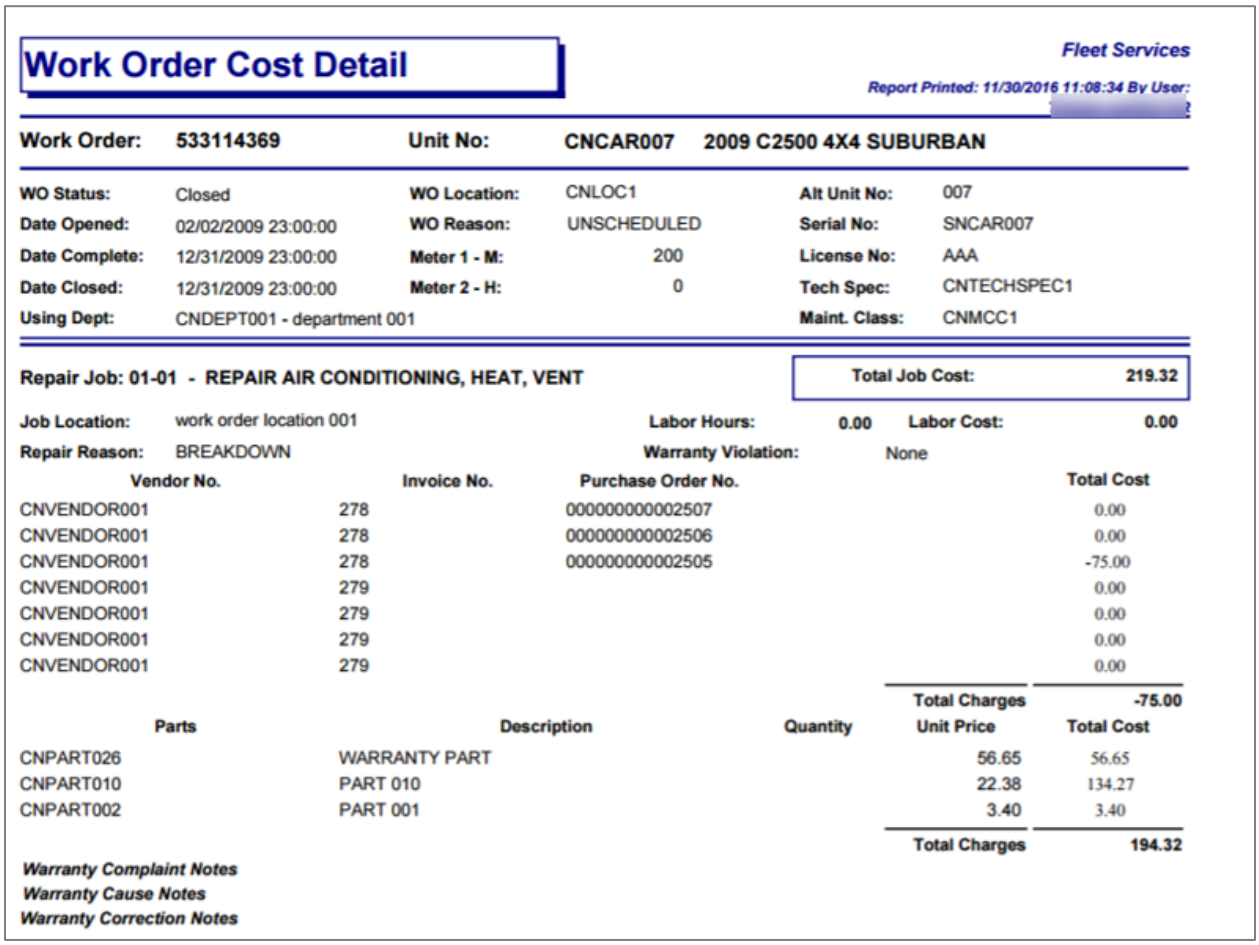
*Fleet Services*

*Report Printed: 11/30/2016 11:06:46 By User:*

| Work Order | Unit No | Job Open Date | Job Code | Job Location | Status | Job Rsn | Warr Viol | Warranty Claim No | Labor Cost | Part Cost | Comm Cost | Total Cost |
|---|---|---|---|---|---|---|---|---|---|---|---|---|
| **Job Location: CNLOC1 - work order location 001** | | | | | | | | | | | | |
| 533114369 | CNCAR007 | 02/02/2009 23:00:00 | 01-02 | CNLOC1 | DON | W | J | 278 | 40.00 | 0.00 | 0.00 | 40.00 |
| 533114369 | CNCAR007 | 02/02/2009 23:00:00 | 01-03 | CNLOC1 | DON | W | J | 278 | 60.00 | 0.00 | (75.00) | (15.00) |
| 533114369 | CNCAR007 | 02/02/2009 23:00:00 | 01-04 | CNLOC1 | DON | W | J | 278 | 0.00 | 3.40 | 0.00 | 3.40 |

## Work Order Cost Detail Warranty

The Work Order Cost Detail Warranty Report lists jobs by work order in detail displaying the work order information and all costs for the warranty jobs.



**Work Order Cost Detail**

*Fleet Services*

*Report Printed: 11/30/2016 11:08:34 By User:*

**Work Order:** 533114369 **Unit No:** CNCAR007 2009 C2500 4X4 SUBURBAN

| | | | | | |
|---|---|---|---|---|---|
| **WO Status:** | Closed | **WO Location:** | CNLOC1 | **Alt Unit No:** | 007 |
| **Date Opened:** | 02/02/2009 23:00:00 | **WO Reason:** | UNSCHEDULED | **Serial No:** | SNCAR007 |
| **Date Complete:** | 12/31/2009 23:00:00 | **Meter 1 - M:** | 200 | **License No:** | AAA |
| **Date Closed:** | 12/31/2009 23:00:00 | **Meter 2 - H:** | 0 | **Tech Spec:** | CNTECHSPEC1 |
| **Using Dept:** | CNDEPT001 - department 001 | | | **Maint. Class:** | CNMCC1 |

**Repair Job: 01-01 - REPAIR AIR CONDITIONING, HEAT, VENT** **Total Job Cost:** 219.32

**Job Location:** work order location 001 **Labor Hours:** 0.00 **Labor Cost:** 0.00

**Repair Reason:** BREAKDOWN **Warranty Violation:** None

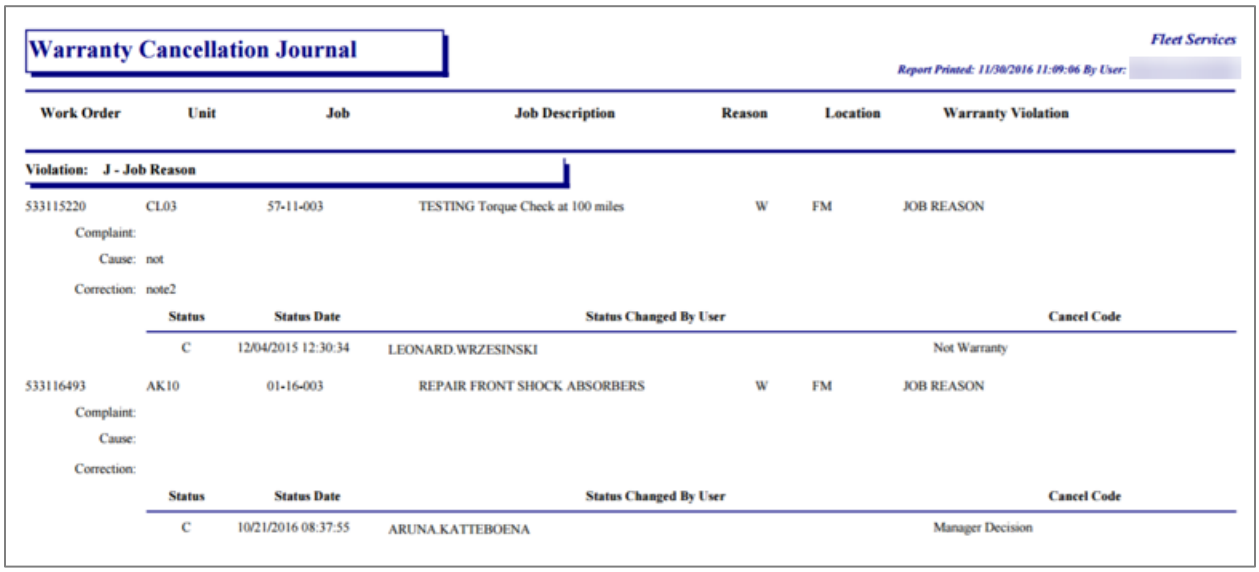
| Vendor No. | Invoice No. | Purchase Order No. | Total Cost |
|---|---|---|---|
| CNVENDOR001 | 278 | 000000000002507 | 0.00 |
| CNVENDOR001 | 278 | 000000000002506 | 0.00 |
| CNVENDOR001 | 278 | 000000000002505 | -75.00 |
| CNVENDOR001 | 279 | | 0.00 |
| CNVENDOR001 | 279 | | 0.00 |
| CNVENDOR001 | 279 | | 0.00 |
| CNVENDOR001 | 279 | | 0.00 |
| | | **Total Charges** | **-75.00** |

| Parts | Description | Quantity | Unit Price | Total Cost |
|---|---|---|---|---|
| CNPART026 | WARRANTY PART | | 56.65 | 56.65 |
| CNPART010 | PART 010 | | 22.38 | 134.27 |
| CNPART002 | PART 001 | | 3.40 | 3.40 |
| | | | **Total Charges** | **194.32** |

***Warranty Complaint Notes***
***Warranty Cause Notes***
***Warranty Correction Notes***

## Work Order Warranty Cancellation

The Work Order Warranty Cancellation Report is a listing by work order that shows warranty violations and includes the job code and description, the job reason, location and warranty violation detail.



**Warranty Cancellation Journal**

*Fleet Services*

*Report Printed: 11/30/2016 11:09:06 By User:*

| Work Order | Unit | Job | Job Description | Reason | Location | Warranty Violation |
|---|---|---|---|---|---|---|
| **Violation: J - Job Reason** | | | | | | |
| 533115220 | CL03 | 57-11-003 | TESTING Torque Check at 100 miles | W | FM | JOB REASON |
| Complaint: | | | | | | |
| Cause: not | | | | | | |
| Correction: note2 | | | | | | |

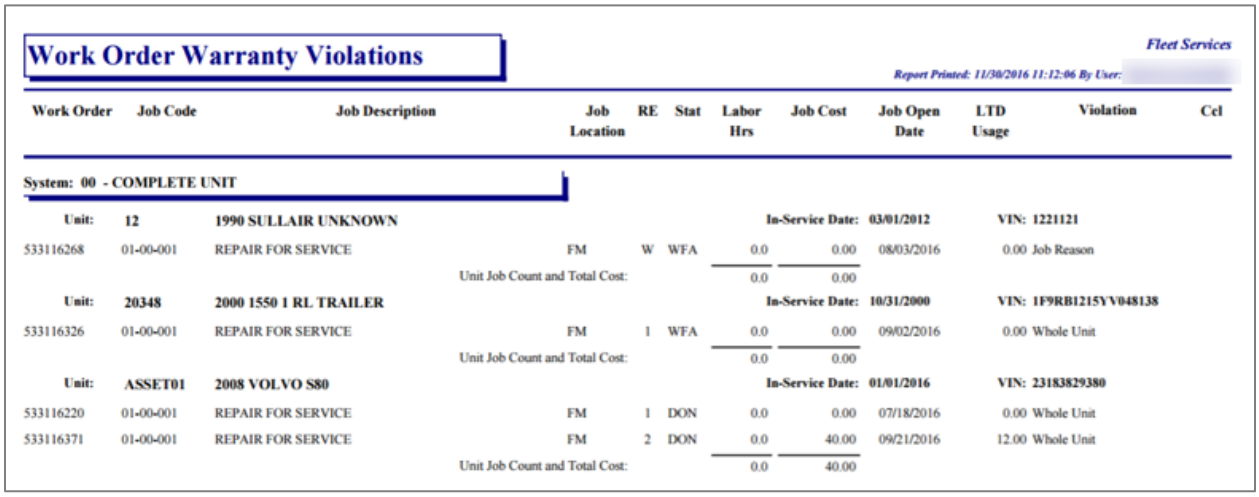
| Status | Status Date | Status Changed By User | Cancel Code |
|---|---|---|---|
| C | 12/04/2015 12:30:34 | LEONARD.WRZESINSKI | Not Warranty |

| | | | | | | |
|---|---|---|---|---|---|---|
| 533116493 | AK10 | 01-16-003 | REPAIR FRONT SHOCK ABSORBERS | W | FM | JOB REASON |
| Complaint: | | | | | | |
| Cause: | | | | | | |
| Correction: | | | | | | |

| Status | Status Date | Status Changed By User | Cancel Code |
|---|---|---|---|
| C | 10/21/2016 08:37:55 | ARUNA.KATTEBOENA | Manager Decision |

## Work Order Warranty Violations

The Work Order Warranty Violations Report lists all units with potential warranty violations and includes the work order number, the job code, its description, location, status, cost, open date LTD usage and the violation detail.



**Work Order Warranty Violations**

*Fleet Services*

*Report Printed: 11/30/2016 11:12:06 By User:*

| Work Order | Job Code | Job Description | Job Location | RE | Stat | Labor Hrs | Job Cost | Job Open Date | LTD Usage | Violation | Ccl |
|---|---|---|---|---|---|---|---|---|---|---|---|
| **System: 00 - COMPLETE UNIT** | | | | | | | | | | | |
| **Unit:** | **12** | **1990 SULLAIR UNKNOWN** | | | | | **In-Service Date:** | **03/01/2012** | | **VIN: 1221121** | |
| 533116268 | 01-00-001 | REPAIR FOR SERVICE | FM | W | WFA | 0.0 | 0.00 | 08/03/2016 | 0.00 | Job Reason | |
| | | Unit Job Count and Total Cost: | | | | 0.0 | 0.00 | | | | |
| **Unit:** | **20348** | **2000 1550 1 RL TRAILER** | | | | | **In-Service Date:** | **10/31/2000** | | **VIN: 1F9RB1215YV048138** | |
| 533116326 | 01-00-001 | REPAIR FOR SERVICE | FM | 1 | WFA | 0.0 | 0.00 | 09/02/2016 | 0.00 | Whole Unit | |
| | | Unit Job Count and Total Cost: | | | | 0.0 | 0.00 | | | | |
| **Unit:** | **ASSET01** | **2008 VOLVO S80** | | | | | **In-Service Date:** | **01/01/2016** | | **VIN: 23183829380** | |
| 533116220 | 01-00-001 | REPAIR FOR SERVICE | FM | 1 | DON | 0.0 | 0.00 | 07/18/2016 | 0.00 | Whole Unit | |
| 533116371 | 01-00-001 | REPAIR FOR SERVICE | FM | 2 | DON | 0.0 | 40.00 | 09/21/2016 | 12.00 | Whole Unit | |
| | | Unit Job Count and Total Cost: | | | | 0.0 | 40.00 | | | | |

# 9. Updates

| Release | Section | Description |
|---|---|---|
| 23.1 | Additional Information - System Flags | Added new system flag 5522. |
| 23.2 | All sections | Applied miscellaneous writing style updates throughout the document. |
| 24.0 | Additional Information - System Flags | Updated the reference to the System Flags Table guide. Removed the System Flags table. |