

PROCUREMENT

ADD A WARRANTY CLAIM

A serialised item, must be linked to a warranty in order to raise a warranty claim.

A call must be logged, linked to the machine under warranty, before the claim can be raised.

If the claim is against a part being replaced within the machine, this part must be **requested** and **issued** to the call - remember to mark this item as 'billable'. This will not bill the client, but enable the part to pull through to the warranty claim. In this case, the machine and part in question will pull through to the warranty claim item list. The machine line item can then be removed before saving the claim.

Ribbon Access: Procurement > Claims





The *Warranty Claims* listing screen will be displayed.

• Click on Add.



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SEARCH FOR AND SELECT THE RELATED CALL

• Click in the *Call* row and *Reference No* column text box.



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- An *ellipsis* button will be revealed. Click on the button to display the Select the related call for this call pop up screen.
- 2. Click on the *row selector* in front of the linked call.
- 3. Click on *Ok*.



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VIEW SUPPLIER DETAILS

The screen will now populate with:

- 1. the machine Serial No, Call Reference No (and Contract No if applicable),
- 2. Supplier,
- 3. Currency, Tax and Exchange Rate details and
- 4. the linked item(s) details.



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ADD WARRANTY CLAIM DETAILS

- Warrant Desc: Click on the search button and select the warranty.
- Claim Status: This will auto populate with New.
- **Salesman:** Click on the drop-down arrow and select from the list the salesman responsible for this warranty claim.
- **Reference:** Type in a claim reference.



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ADD BILLING ADDRESS

- 1. When you have finished adding the details as listed above,
- 2. click on the *Addresses* tab.



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The *Addresses* frame will be displayed.

• Click on the *search* button in the *Billing Address* text box.



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- 1. The *Select an address for this claim* screen will pop up.
- 2. Click on the *row selector* in front of the correct billing address
- 3. Click on *Ok*.



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1. The selected address will populate the *Billing address* text box.

ADD SHIPPING ADDRESS

Click on the *search* button and follow the same process to add a *Shipping Address*.



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ITEMS DATA GRID

In this example, the claim is for replacement of a part within the machine, and not the machine itself. In which case the machine should be deleted from the list.

DELETE NON-ADMISSABLE ITEMS

- 1. Select the *row* of the item that is <u>not</u> having a claim raised against it.
- 2. Click on *Delete Item*.



	. .							Add	new Warra	nty Claim - I	PO: Versior	n 2.1.0.	68 - Exam	ple Cor	mpany					100			×
0	Home	Equipr	nent	and Locati	ons	Contract	Finar	nce and HF	R Invento	ory Mainter	ance and Pro	ojects	Manufact	turing	Procu	rement	Sales	Service	Report	ing Utilitie	s —	8	х
H	Back	Delet	te	Save Lave	out	Workspaces	C	Print															
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- A *Confirm delete line* message box will pop up asking;
 - Are you sure you want to remove this line from the warranty claim?
- Click on Yes.



							Add n	ew Warranty	Claim - Bl	O: Version 2.1.0	.68 - Example Co	mpany				877		\times
0	Home	Equipr	nent and	d Location:	s Contract	Finan	ce and HR	Inventory	Maintena	nce and Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- i	8 x
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۱ Cla	Su Varranty Claim S Sale Refe im Date, Cur	pplier Desc itatus sman rence /Time rency Rate	Sprint D Six Mon New Abigail I WARR0 10 Dec South A	vistributors th Supplie Vilne 100 2018 African Rar	s Local r Warranty T2:15:20 nd	م م • •	* * *	Billin Shippin	g address g address	PO Box 1234 Forest Hills Durban KZN 685 Forest Grov Forest Hills 1234	م e Road م	•						
E	xchange	Rate	1				•	Addresses	Related	References								
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1 -						Confi	rm delete	line You sure you 1?	want to re	move this line fr Yes	om the warranty							
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Open	Windows	•														10 Dec	2018	0

- The selected item will be *removed* from the Items frame.
- Continue deleting items until you are only left with the item(s) for which you are raising a claim.

SAVE WARRANTY CLAIM

When you have finished editing the Add new Warranty screen, click on *Save*.



	Ŧ						Add ne	w Warranty	Claim - B	PO: Version 2	2.1.0.68	- Example Co	mpan	у				25725			×
0	Home	Equipr	ment and Loca	tions	Contract	Financ	e and HR	Inventory	Mainten	ance and Proje	ects I	Manufacturing	Proc	urement	Sales	Service	Reporting	Utilitie	s —	Ð	х
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Exe	change	Rate	1			4	•	Addresses	Related	References											
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*	3	Select .																			
												Qty		2.00	Su	ub Total				4 950	.00
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															Gra	nd Total			1	5 692	.50
Open W	/indows 🔻																	10 De	ec 2018	4	

- A *Warranty Module Claim Generation* message box will pop up informing you that;
 - The claim, [] has been saved.
- Click on OK.



· ·	Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company											\times
Home Equip	ment and Loca	tions Contract	Finance and HR	Inventory Main	tenance and Projec	ts Manufacturing	Procurement	Sales Service	Reporting Ut	tilities –	- B	х
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Supplier	Sprint Distribu	tors Local	p *	Pilling addw	PO Box 1234		0					
Warranty Desc	Six Month Sup	plier Warranty	P *	bining addre	Forest Hills	<i>.</i>	<u> </u>					
Claim Status	New		-		KZN	KZN						
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Reference	WARR0100 10 Dec 2018 • 12:15:20 PM		*	Shipping addre	Forest Hills							
Claim Date/Time			м 🗘		1234	1234						
Currency	South African	Rand	-									
Tax Rate	0											
Exchange Rate	1			Addresses Relat	ed References							_
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INVI Parts	2020-856	Drum	Drum	1.00	0.00	100.00	0.00 0.0	0 100.00	Main Warehouse	15.	00 A	
* Select												
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								VAT			74	2.50
								Grand Tota			5 693	2.50
Open Windows 🕶									1	0 Dec 201	в (1.

You will return to the *Warranty Claims* listing screen.

VIEW NEW WARRANTY CLAIM

- 1. The new warranty claim will display in this screen
- 2. where the status is set to *New*.
- 3. The claim will need to be Accepted and then
- 4. <u>Printed</u> in order to complete the process.



	Ŧ	Warranty Claims : Claim No : WARR0100 - BPO: Version 2.1.0.68 - Example Company									2000		×		
0	Home	Equipment a	and Locations	Contract F	inance and HR Ir	ventory M	Maintenance and Pi	rojects Manu	Ifacturing	Procurement	Sales Serv	ice Repo	rting Utilities	- 1	9 X
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► WC0	000017	17 SPR001 Sprint Distributors Local		Six Month Supplier Warranty		New	WARR0100	115.00	ZAR	1.00	0.00	10 Dec 2018	12:15:3	20 Abia	
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