

We are currently updating our site; thank you for your patience.

## PROCUREMENT

### ADD A WARRANTY CLAIM

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

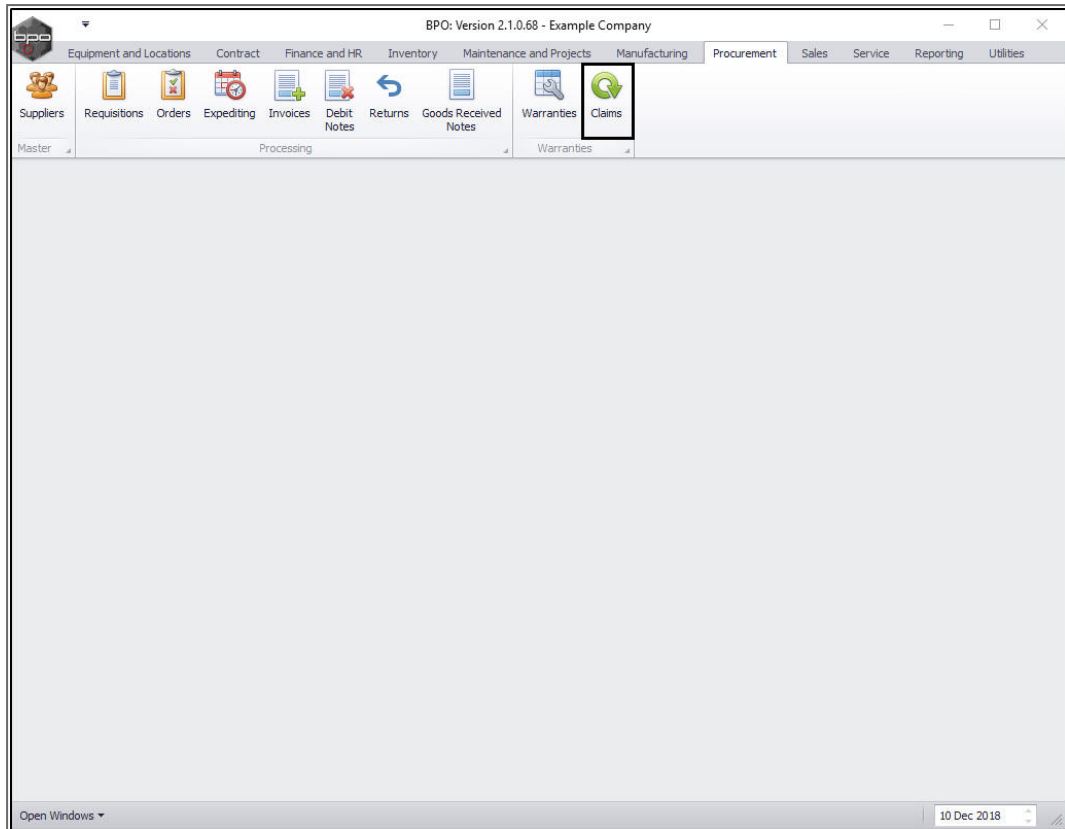
A **call must be logged**, linked to the machine under warranty, before the claim can be raised.

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.

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**Ribbon Access:** Procurement > Claims

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The **Warranty Claims** listing screen will be displayed.

- Click on **Add**.

Warranty Claims : Claim No : Claim AB 01 - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Drag a column header here to group by that column

ClaimNo	SupplierCode	SupplierName	WarrantyDesc	ClaimStatusDesc	Reference	ClaimValue	Currency	ExchangeRate	TaxRate	ClaimDate	ClaimTime	S
WC0000016	SPR001	Sprint Distributors Local	12 Month Supplier Warranty	New	Claim AB 01	5 175.00	ZAR	1.00	0.00	11 Oct 2018	02:11:40	A

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## SEARCH FOR AND SELECT THE RELATED CALL

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

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Warranty Desc Claim Status New Salesman Reference Claim Date/Time 10 Dec 2018 12:15:20 PM Currency Tax Rate Exchange Rate

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	
CALL	Call Reference	
CTRT	Contract No	

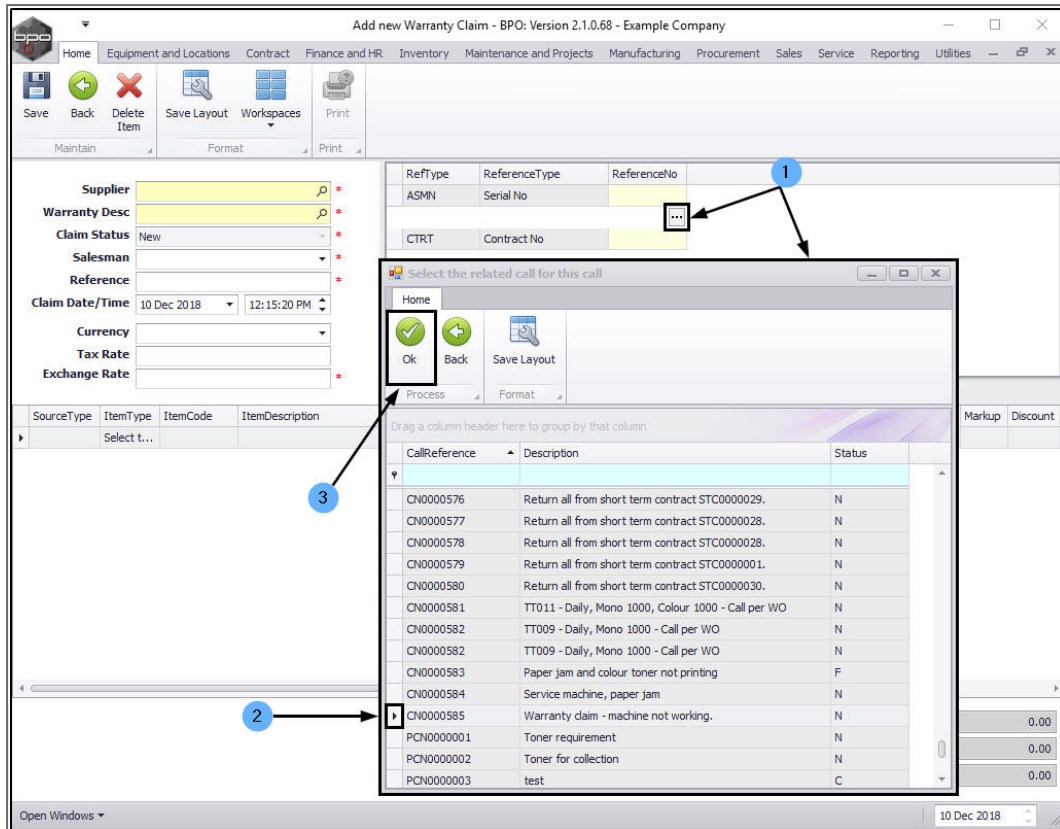
Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount
	Select t...									

Qty 0.00 Sub Total 0.00 VAT 0.00 Grand Total 0.00

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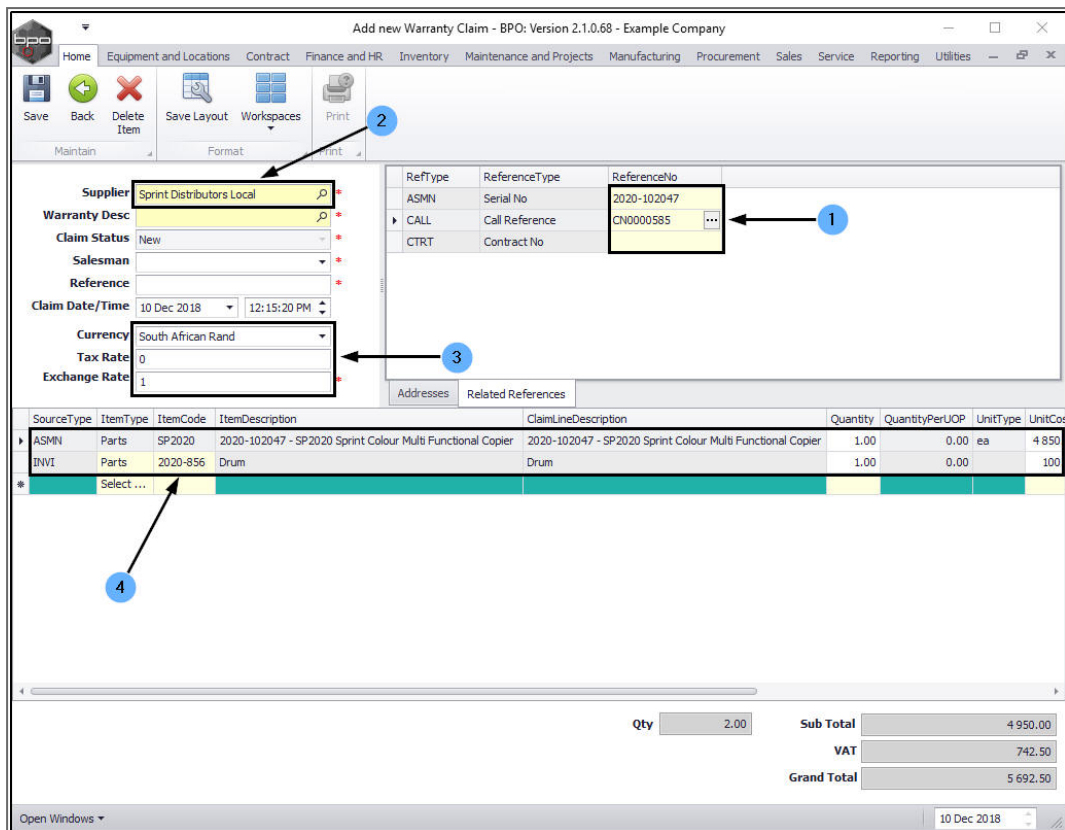
1. An **ellipsis** button will be revealed. Click on the button to display the **Select the related call for this call** pop up screen.
2. Click on the **row selector** in front of the linked call.
3. Click on **Ok**.



## 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.



The screenshot shows the 'Add new Warranty Claim' form in the BPO system. The form is titled 'Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company'. It features a menu bar with options like Home, Equipment and Locations, Contract, Finance and HR, Inventory, Maintenance and Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below the menu is a toolbar with buttons for Save, Back, Delete Item, Save Layout, Workspaces, and Print. The form itself is divided into several sections:

- Supplier:** A search button (magnifying glass) is next to the text 'Sprint Distributors Local'.
- Warranty Desc:** A search button (magnifying glass) is next to the text 'Sprint Distributors Local'.
- Claim Status:** A dropdown menu set to 'New'.
- Salesman:** A dropdown menu.
- Reference:** A text field containing '2020-102047'.
- Claim Date/Time:** A date and time picker set to '10 Dec 2018' and '12:15:20 PM'.
- Currency:** A dropdown menu set to 'South African Rand'.
- Tax Rate:** A text field set to '0'.
- Exchange Rate:** A text field set to '1'.
- Related References:** A table with columns 'RefType', 'ReferenceType', and 'ReferenceNo'. It contains three rows: 'ASMN' (Serial No), 'CALL' (Call Reference), and 'CTRRT' (Contract No). The 'ReferenceNo' for 'CALL' is 'CN0000585'.
- Item Table:** A table with columns 'SourceType', 'ItemCode', 'ItemDescription', 'ClaimLineDescription', 'Quantity', 'QuantityPerUOP', 'UnitType', and 'UnitCost'. It contains two rows: 'ASMN' (Parts) and 'INVI' (Parts).
- Summary:** A section at the bottom right showing 'Qty' (2.00), 'Sub Total' (4 950.00), 'VAT' (742.50), and 'Grand Total' (5 692.50).

Numbered callouts in the image point to specific fields:

- 1:** Points to the 'ReferenceNo' field in the 'Related References' table.
- 2:** Points to the 'Print' button in the toolbar.
- 3:** Points to the 'Currency' dropdown menu.
- 4:** Points to the 'Select...' button in the 'Item Table'.

## 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.

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Sprint Distributors Local

Warranty Desc

Claim Status New

Salesman

Reference

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

RefType	ReferenceType	ReferenceNo
ASMN	Serial No	2020-102047
CALL	Call Reference	CN0000585
CTRT	Contract No	

Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost
ASMN	Parts	SP2020	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	1.00	0.00	ea	4 850.00
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00
*	Select ...							

Qty 2.00 Sub Total 4 950.00

VAT 742.50

Grand Total 5 692.50

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## ADD BILLING ADDRESS

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

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Sprint Distributors Local

Warranty Desc Six Month Supplier Warranty

Claim Status New

Salesman Abigail Milne

Reference WARR0100

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

Reftype ReferenceType ReferenceNo

ASMN Serial No 2020-102047

CALL Call Reference CN0000585

CTRT Contract No

Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost
ASMN	Parts	SP2020	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	1.00	0.00	ea	4 850.00
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00
*	Select ...							

Qty 2.00

Sub Total 4 950.00

VAT 742.50

Grand Total 5 692.50

Open Windows 10 Dec 2018

The **Addresses** frame will be displayed.

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



Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Sprint Distributors Local

Warranty Desc Six Month Supplier Warranty

Claim Status New

Salesman Abigail Milne

Reference WARR0100

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

Billing address

Shipping address

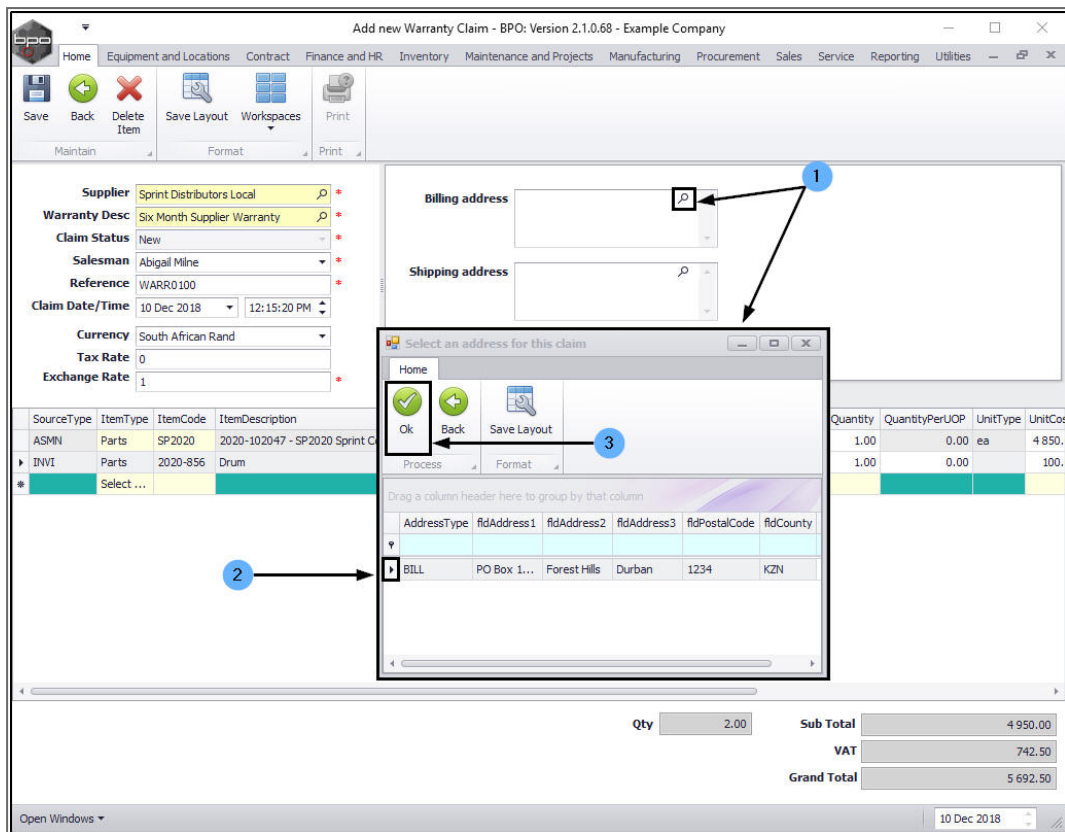
Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost
ASMN	Parts	SP2020	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	1.00	0.00	ea	4 850.00
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00
*	Select ...							

Qty 2.00 Sub Total 4 950.00 VAT 742.50 Grand Total 5 692.50

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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**.



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

## ADD SHIPPING ADDRESS

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

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Sprint Distributors Local

Warranty Desc Six Month Supplier Warranty

Claim Status New

Salesman Abigail Milne

Reference WARR0100

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

Billing address PO Box 1234  
Forest Hills  
Durban  
KZN

Shipping address

Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost
ASMN	Parts	SP2020	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	1.00	0.00	ea	4 850.00
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00
*	Select ...							

Qty 2.00 Sub Total 4 950.00  
VAT 742.50  
Grand Total 5 692.50

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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 not having a claim raised against it.
2. Click on **Delete Item**.

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back **Delete Item** Save Layout Workspaces Print

Supplier Sprint Distributors Local

Warranty Desc Six Month Supplier Warranty

Claim Status New

Salesman Abigail Milne

Reference WARR0100

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

Billing address PO Box 1234  
Forest Hills  
Durban  
KZN

Shipping address 685 Forest Grove Road  
Forest Hills  
1234

Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost
ASMN	Parts	SP2020	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	1.00	0.00	ea	4 850.00
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00
*	Select ...							

Qty 2.00 Sub Total 4 950.00

VAT 742.50

Grand Total 5 692.50

Open Windows 10 Dec 2018

- 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 new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Sprint Distributors Local

Warranty Desc Six Month Supplier Warranty

Claim Status New

Salesman Abigail Mlne

Reference WARR0100

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

Billing address PO Box 1234  
Forest Hills  
Durban  
KZN

Shipping address 685 Forest Grove Road  
Forest Hills  
1234

Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost
ASMN	Parts	SP2020	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	2020-102047 - SP2020 Sprint Colour Multi Functional Copier	1.00	0.00	ea	4 850.00
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00
*	Select ...							

Confirm delete line

Are you sure you want to remove this line from the warranty claim?

Yes No

Qty 2.00 Sub Total 4 950.00 VAT 742.50 Grand Total 5 692.50

Open Windows 10 Dec 2018

- 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**.

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier: Sprint Distributors Local

Warranty Desc: Six Month Supplier Warranty

Claim Status: New

Salesman: Abigail Milne

Reference: WARR0100

Claim Date/Time: 10 Dec 2018 12:15:20 PM

Currency: South African Rand

Tax Rate: 0

Exchange Rate: 1

Billing address: PO Box 1234, Forest Hills, Durban, KZN

Shipping address: 685 Forest Grove Road, Forest Hills, 1234

Addresses: Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	WarehouseName	TaxRate	St...
ZNVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00	0.00	0.00	100.00	Main Warehouse	15.00	A

Qty: 2.00

Sub Total: 4 950.00

VAT: 742.50

Grand Total: 5 692.50

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

CO3 Technologies

Add new Warranty Claim - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Save Back Delete Item Save Layout Workspaces Print

Maintain Format Print

Supplier Sprint Distributors Local

Warranty Desc Six Month Supplier Warranty

Claim Status New

Salesman Abigail Milne

Reference WARR0100

Claim Date/Time 10 Dec 2018 12:15:20 PM

Currency South African Rand

Tax Rate 0

Exchange Rate 1

Billing address PO Box 1234  
Forest Hills  
Durban  
KZN

Shipping address 685 Forest Grove Road  
Forest Hills  
1234

Addresses Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCost	Markup	Discount	UnitSellingPrice	WarehouseName	TaxRate	St...
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.00	0.00	0.00	100.00	Main Warehouse	15.00	A

Warranty Module - Claim Generation

The claim, WC0000017, has been saved.

OK

Qty 2.00 Sub Total 4 950.00

VAT 742.50

Grand Total 5 692.50

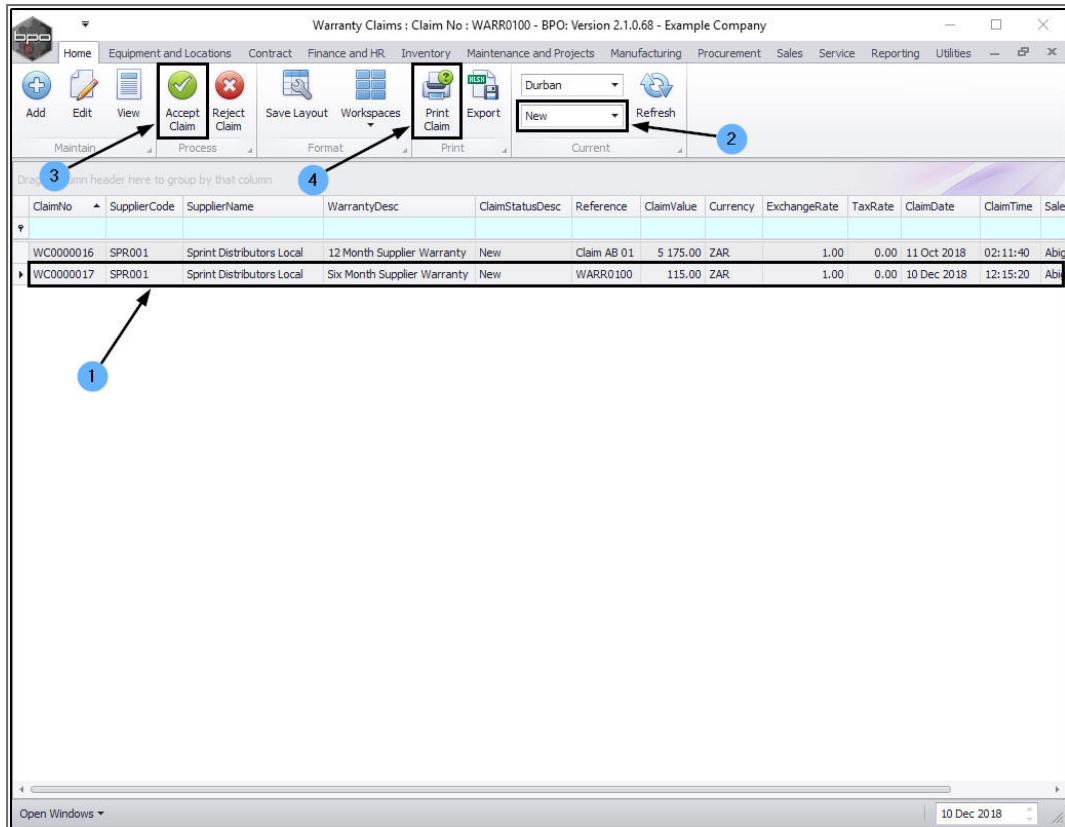
Open Windows 10 Dec 2018

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. Printed in order to complete the process.

## Add a Warranty Claim



Warranty Claims : Claim No : WARR0100 - BPO: Version 2.1.0.68 - Example Company

Home Equipment and Locations Contract Finance and HR Inventory Maintenance and Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit View Accept Claim Reject Claim Save Layout Workspaces Print Claim Export Durban New Refresh

Drag column header here to group by that column

ClaimNo	SupplierCode	SupplierName	WarrantyDesc	ClaimStatusDesc	Reference	ClaimValue	Currency	ExchangeRate	TaxRate	ClaimDate	ClaimTime	Sale
WC0000016	SPR001	Sprint Distributors Local	12 Month Supplier Warranty	New	Claim AB 01	5 175.00	ZAR	1.00	0.00	11 Oct 2018	02:11:40	Abig
WC0000017	SPR001	Sprint Distributors Local	Six Month Supplier Warranty	New	WARR0100	115.00	ZAR	1.00	0.00	10 Dec 2018	12:15:20	Abig

Open Windows 10 Dec 2018

MNU.133.001