

EQUIPMENT

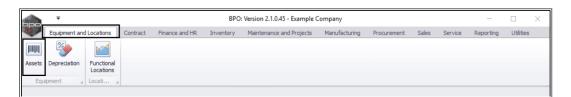
ASSETS - WARRANTIES - VIEW, ADD, EDIT

Warranties can be assigned:

- i. Either through the <u>auto apply warranty</u> feature when the asset is GRN'd.
- ii. Or by assigning the machine to the warranty.

Follow the process below to **view**, **add** or **edit** a Warranty directly from the Asset Listing (**Machine List for []**) screen.

Ribbon Access: Equipment and Locations > Assets



The *Machine List for []* screen will be displayed.

SELECT THE SITE AND STATUS

- Although it is not necessary in this process, it good practice to begin a process by selecting the *site* where an asset is linked.
 - In this image *Durban* is selected.



Home Equipmen	nt and L	ocations Contract Finance and HR In	ventory Mai	ntenance and Projects	Manufacturing	Procurement	Sales Service	Reporting Utilities	- 6	P :
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		Acer copier outer shell	ACR-01	4377654				28 Feb 2017	Α	A
Documents		Acer copier outer shell	ACR-01	12343				28 Feb 2017	Α	A
		Acer copier outer shell	ACR-01	12342				28 Feb 2017	Α	A

 This screen will open by default in the *All* status. You do <u>not</u> need to change this status in order to view or add asset warranties. If this screen is already open in another status e.g. Internal Assets, then click on the *drop-down arrow* and select from the list, the right status that contains the asset you wish to work with.

SELECT THE ASSET

- 2. Select the *row* of the *asset* where you wish to *view* or *add* a warranty.
- 3. Click on the *Warranties* tile.



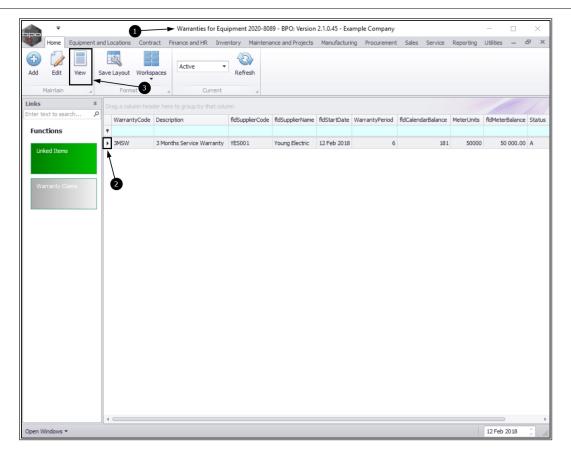
Assets - Warranties - View, Add, Edit

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				Copier				SP1020	1020-10102	SP 1020			22 Jun 2015	Α		
				Conior				CD 10 20	1020 10105	CD 10 20	Apple Juice Inc	Color Doport	22 him 2015	۸		

VIEW WARRANTY

- 1. The *Warranties for Equipment []* screen will be displayed.
 - If there are any currently linked warranties, they will be listed in this screen.
 - ° Relevant details, such as warranty expiry can be viewed.
- If there is <u>more than one</u> linked warranty in the list, select the *row* of the warranty that you wish to view.
- 3. Click on *View*.





- 1. The *Edit Customer Warranty []* screen will open.
- As you clicked on the *View* button to open this screen (and not the *Edit* button), all the information in this screen is *uneditable*. There is a *Back* button but no *Save* button.
- 3. Here you can view the selected warranty and validity information.
- 4. Click on the tabs to bring the relevant frame to the fore:
 - The *Applicable Meters* frame displays a list of the Meter Types linked to the warranty.
 - The *Site Defaults* frame displays a list of the Sites linked to the warranty.

Click on *Back* to return to the *Warranties for Equipment []* screen.

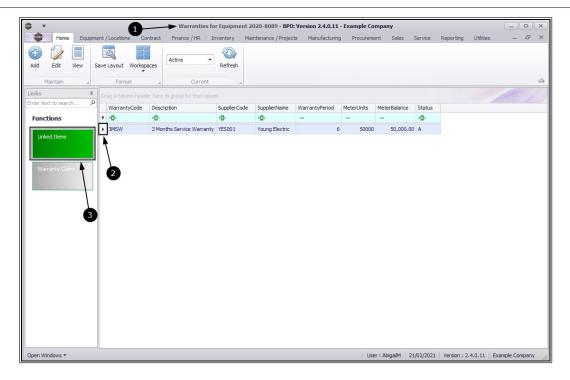


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Open Windows 🔻												12 Feb 2	2018	-	

VIEW LINKED ITEMS

- 1. In the *Warranties for Equipment []* screen,
- 2. Select the *row* of the warranty where you wish to view the associated items.
- 3. Click on the *Linked Items* tile.





- 1. The *Warranties* listing screen will open. The list will <u>only</u> display the items linked to the selected warranty.
- 2. In this example there are **2** items currently linked.
 - Note: From this screen you can also follow the process to add another customer asset to this warranty, if required.

VIEW METERS OF THE LINKED ITEMS

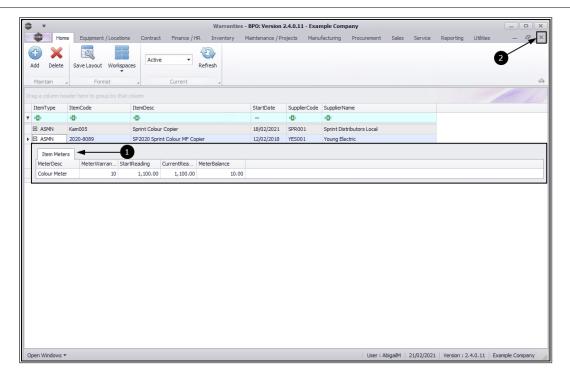
3. Click on the *expand* icon in a row of a linked item.



\$ *		Warranties -	BPO: Version	2.4.0.11 - Exar	nple Company			_	
Home	Equipment / Locations		Maintenance / Pr	ojects Manu	facturing Procurement	Sales Service	Reporting U	tilities —	8 ×
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69									
Open Windows 🕶					User : Abig	gailM 21/02/2021	Version : 2.4.0	11 Example Co	mpany

- 1. You will be able to view the linked *Items Meters* in the expanded frame.
- Collapse the frame and *Close* the screen to return to the *Warranties* for Equipment [] screen.





Close the *Warranties for Equipment* [] screen to return to the *Machine List* for [] screen.

		Warranties for Equipment	2020-8089 - BPO: Ver	sion 2.4.0.11 - Ex	cample Company			_ – ×
Home Equipme	nt / Locations Contrac	t Finance / HR Inventory M	aintenance / Projects	Manufacturing	Procurement Sa	les Service	Reporting Utilitie	s _ 🛃 🗙
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Warranty Claims								
Open Windows 🕶					User : Abigail	M 21/02/2021	Version : 2.4.0.11	Example Company



ADD A WARRANTY

- 1. In the *Machine List for []* screen, select the site where you wish to proceed.
- Ensure that you select the *row* of the asset where you wish to *add* a warranty.
- 3. Click on the *Warranties* tile.

	Home	Equ	uipment /	Locations Co	ontract Fin	ance / HR	Inventory Mainte	nance / Projec	ts Manufact	uring Proc	urement Sales	Service	e Reporting	Utilitie	s —	8
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Mete	ers		• •	AREG000396	SP500	Sprint Colo	ur Copier	Hardware	WHSE		Kam005	Α	14/04/2020	No	No	No
	2			AREG000397	AT500	AT500 Cop	vier	Hardware	SINV	AT500	wqe12	A	16/04/2020	No	No	No
	9			AREG000398	AT500	AT500 Cop	ier	Hardware	WKOR	AT500	asdf456	Α	16/04/2020	No	No	No
Histo	oru.				KZN-122TFB	Kruger ZN	Fax Machine	Hardware	WHSE	ZN122	sin12345568	A	16/04/2020	No	No	No
1 10 00				SIN 123	1458-96523	K147 Kyoc	era Colour Copier	Kyocera Mul	tif WHSE	K147	sin 123	Α	16/04/2020	No	No	No
				AREG000365	SP2020	SP2020 Sp	rint Colour MF Copier	Hardware	WHSE	SP2020	SP2020-CON00	A	17/04/2020	No	No	No
				AREG000399	16-856	Drum for S	P1616	Spare Parts	WHSE			Α	21/04/2020	No	No	No
BOM				AREG000400	SP2020	SP2020 Sp	rint Colour MF Copier	Hardware	WHSE	SP2020	Test01	A	22/04/2020	No	No	No
				AREG000401	SP2020	SP2020 Sp	rint Colour MF Copier	Hardware	WHSE	SP2020	Tes02	A	22/04/2020	No	No	No
				AREG000402	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-01	A	24/04/2020	No	No	No
Warr	ranties			AREG000403	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-02	А	24/04/2020	No	No	No
				AREG000404	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-03	A	24/04/2020	No	No	No
				AREG000405	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-04	A	24/04/2020	No	No	No
Note	es 🕴			AREG000406	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-05	A	24/04/2020	No	No	No
				AREG000407	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-06	Α	24/04/2020	No	No	No
				AREG000408	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-07	A	24/04/2020	No	No	No
Docu	uments	3		AREG000409	17-856	Drum for S	P1717	Spare Parts	WHSE		SP1717-08	Α	24/04/2020	No	No	No
				AREG000410	PCMON001	PC Monitor	- Samsung	Accessories	WHSE		2020-9193	Α	18/01/2021	No	No	Yes
				AREG000412	SP2020	SP2020 Sp	rint Colour MF Copier	Hardware	WHSE	SP2020	000001	A	11/02/2021	No	No	No
	topopo			AREG000411	SP500	Sprint Colo	ur Copier	Hardware	WHSE		AKM001002	A	15/02/2021	No	No	No

- 1. The *Warranties for Equipment []* screen will open.
- 2. Note the *12MSW* warranty already linked to this asset.
- 3. Click on Add.



	0	Warranties for Equipme	ent Kam005 - BPO: Ve	ersion 2.4.0.11 -	Example Company			-	
Home Equipme	nt / Locations Contra	act Finance / HR Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales Servio	e Reporting	Utilities —	8 ×
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Functions	WarrantyCode	Description	WarrantyPeriod	MeterUnits	meterbalance	status			
	 12MSW 	12 Month Supplier Warranty	- 12						
Warranty Claims	2								
Open Windows 🕶					User :	AbigailM 18/02,	2021 Version : 2	.4.0.11 Example Co	ompany //

- 1. The *Select a Warranty* screen will pop up.
- 2. Select the *row* of the warranty you wish to add.
- 3. Click on *Ok*.

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	1YSW	1 Year Supplier Warranty	SUPP	Supplier Warranty	1	Years	56000	Copies	Copies made	Yes	A	
	▶ 3MSW	3 Months Service Warranty	SUPP	Supplier Warranty	6	Months	50000	Copies	Copies made	No	A	
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	TES1	TEST	SUPP	Supplier Warranty	6	Months	0			No	A	
	F1YW	Full 1 Year Warranty - unit and	SUPP	Supplier Warranty	1	Years	50000	Copies	Copies made	No	A	
	TNWED	Test new time based warranty	SUPP	Supplier Warranty	5	Years	0			No	A	
	TN	Test New	SUPP	Supplier Warranty	1	Years	0			No	A	
	TN3	Test New 3	SUPP	Supplier Warranty	1	Years	5000	Copies	Copies made	No	A	
	NewW	New warranty	SUPP	Supplier Warranty	13	Bi-annual	4	Copies	Copies made	No	A	



1. The *Add New Warranty Association* screen will open.

WARRANTY DETAILS

- 2. This will populate with the warranty definition *Description* and *Type*.
 - ° You cannot edit this information from this screen.

ASSET

- This will populate with the asset *Serial No.*, *Part Description* and *Model No.*, if applicable.
 - $^\circ~$ You cannot edit this information from this screen.

PERIOD DETAILS

- 4. This will populate with the *Period Type* and *Warranty Period* as set up on the warranty definition.
 - Note: In this frame, the Supplier, Start Date and End Date fields are editable.

SUPPLIER

5. Click on the *search* button in the *Supplier* field.



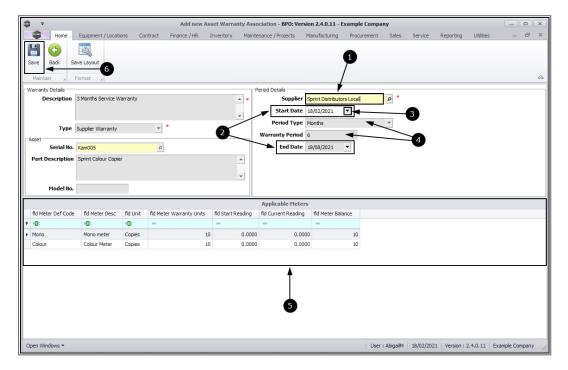
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- 1. The *Select the Supplier* screen will pop up.
- 2. Select the *row* of the supplier that you wish to link to this warranty.
- 3. Click on *Ok*.

	Home	Equipment / Loca	ations Contrac	t Finance / HR In	ventory Mainten	ance / Projects	Manu	ufacturin	ig Procurer	nent Sales	Service	Reporting Ut	tilities	-	Ð
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	mucritor		TON002	Tonys Copy Shop	Tony	SHPA	Α	PS	9874561321	0.00	COD	DHL	ZAR		
			YES001	Young Electric	Grant	GEN	A	PS	3245064654	0.00			ZAR		
	fld Meter Def Code	fld Meter Des	TEST001	Test Supplier	Tam	GEN	I	PS		0.00			ZAR		
	n 🗖 c	* 0 0	PRI0001	Printer World (Pty) Ltd	Maggie Seegers	3PTY	I	PS	456123789	0.00	30 days fro	Wheels with	USD		
	Mono	Mono meter	APD001	Apple Distributors	Sammy Jones	GEN	Α	PT	345678201	0.00		swift	ZAR		
	Colour	Colour Meter	PRI002	Printer World	Maggie Sage Jo	3PTY	I	PS	456123789		10 days fro	Wheels with	USD		
			GME001	Game Suppliers	Jackie Peters	GEN	I	PS	23458902	0.00			ZAR		
			PRI001	Printer World	Maggie Sage	GEN	Α	PT	23451678			Wheels with			
			PRI005	Printer World 2	Richard Sage	GEN	Α	PT	98076523			Wheels on Wi			
			PRI006	Printer WorldLtd	Mary Matthews	3PTY	I	PS	765894210			Wheels on Wi			
			PRI007	Printer World Forex	Matthew Sage	SHPA	Α	PT	768594444			Wheels on wi			
			PRI010	Printer World	Maggie Sage	GEN	A	PT	456123789			Wheels with			
			PRI0011	Printer World	Maggie Sage	GEN	I	PT	456123789			Wheels with			
			PRI0012	Printer World	Maggie Saggie	GEN	A	PT	13456789			Wheels with		_	
			TWI001	Twinkle Office Automat	Gary Marks	GEN	A	SE	9876543210	0.00	30 day	Wing It Couri	ZAR	-	



- 1. The *Supplier* field will now populate with the selection in the previous step.
- Note that the *Start Date* will populate with the <u>current</u> date and in this example, the *End Date* will auto populate 6 months after the Start Date, as the Warranty Period is 6 months.
 - If it was a **12** month Warranty Period then the End Date will auto populate **12** months after the Start Date.
- You can click on the *drop-down arrow* and select an <u>alternative</u> Start Date, if required. The End Date will re-calculate to be 6 months ahead of your selected date.
- 4. The *Period Type* and *Warranty Period* are uneditable in this screen.
- 5. The *Applicable Meters* frame contains details of the meter types linked to this warranty. The details are uneditable from this screen.
- 6. When you have finished adding the details, as required, click on *Save*.



- 1. You will return to the *Warranties for Equipment []* screen.
- 2. The added warranty can now be viewed in this screen.
- 3. Close this screen to return to the *Machine List for [] screen.*



•	0	Warranties for Equipment	Kam005 - BPO: Versi	ion 2.4.0.11 - Exa	ample Company			_ _ x
Home Equipmen	t / Locations Contrac	ct Finance / HR Inventory Ma	aintenance / Projects	Manufacturing	Procurement Sa	ales Service	Reporting Utilitie	s – 🗗 🗙
Add Edit View Sav	ve Layout Workspaces	Active Refresh						3
Maintain 🔺	Format	ے Current						\diamond
Enter text to search P	WarrantyCode	Description	WarrantyPeriod	MeterUnits	MeterBalance	Status		
Functions	Υ #⊡¢	REC	=	-	=	REC		
	MSW	3 Months Service Warranty	6	50000	50,000.00	A		
Linked Items	3MSW	3 Months Service Warranty	6		50,000.00		-0	
	1YSW	1 Year Supplier Warranty	1	56000	56,000.00	Α		
Open Windows 🕶					User : Abigai	IM 21/02/2021	Version : 2.4.0.11	Example Company

EDIT A WARRANTY

- 1. In the *Machine List for [] screen*,
- 2. Select the *Site* you wish to work in.
- 3. Select the *row* of the asset where you wish to *edit* the warranty.
- 4. Click on the *Warranties* tile.



	Home	Equi	pment	/Locations Co	ontract Finan	ce / HR Inventory Maintena	nce / Projects	Manufacturing	g Procure	ment Sales	Service	Reporting U	tilities	- 8
•		X		2		Durban 🔹		la 🏴				2		
dd	Edit D	elete	View	Save Layout	Workspaces	Save Filter All 🔹	Refresh Rev	value Conver	rt Buy Back	Print Expor	t Rep	orts		
					Earmat 2	Y I		-		•				
	Maintenar			4	Format	⊿ Current	4	Process	S	⊿ Print	# Repo	rts 4		
nks					er here to group									
iter text	t to search	h	0	AssetRegNo 🔺	PartCode	Description	CategoryDesc	ParentType	ModelNo	SerialNo	Status	StartDate	Asset	IsFixedAsse
Functi	ions		٩	a l ic	4 0 0	a D c	REC	* E C	REC	REC	REC	-	s I C	a B c
				AREG000392	SP500	Sprint Colour Copier	Hardware	WHSE		Kam001	A	14/04/2020	No	No
				AREG000393	SP500	Sprint Colour Copier	Hardware	WHSE		Kam002	A	14/04/2020	No	No
				AREG000394	SP500	Sprint Colour Copier	Hardware	WHSE		Kam003	A	14/04/2020	No	No
			•	AREG000395	SP500	Sprint Colour Copier	Hardware	WHSE		Kam004	A	14/04/2020	No	No
Proje	ect History	/	1-	AREG000396	SP500	Sprint Colour Copier	Hardware	WHSE		Kam005	A	14/04/2020	No	No
	3			AREG000397	AT500	AT500 Copier	Hardware	SINV	AT500	wqe12	A	16/04/2020	No	No
				AREG000398	AT500	AT500 Copier	Hardware	WKOR	AT500	asdf456	A	16/04/2020	No	No
Meter	ers			AREG000399	16-856	Drum for SP1616	Spare Parts	WHSE			A	21/04/2020	No	No
				AREG000400	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Test01	A	22/04/2020	No	No
				AREG000401	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	Tes02	A	22/04/2020	No	No
Histor	NEW C			AREG000402	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-01	A	24/04/2020	No	No
Thistor	ory 2	Ð		AREG000403	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-02	A	24/04/2020	No	No
				AREG000404	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-03	Α	24/04/2020	No	No
				AREG000405	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-04	Α	24/04/2020	No	No
BOM				AREG000406	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-05	Α	24/04/2020	No	No
	+			AREG000407	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-06	Α	24/04/2020	No	No
				AREG000408	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-07	Α	24/04/2020	No	No
Warr	ranties			AREG000409	17-856	Drum for SP1717	Spare Parts	WHSE		SP1717-08	Α	24/04/2020	No	No
				AREG000410	PCMON001	PC Monitor - Samsung	Accessories	WHSE		2020-9193	Α	18/01/2021	No	No
				AREG000411	SP 500	Sprint Colour Copier	Hardware	WHSE		AKM001002	Α	15/02/2021	No	No
Notes				AREG000412	SP2020	SP2020 Sprint Colour MF Copier	Hardware	WHSE	SP2020	000001	A	11/02/2021	No	No
				SIN 123	1458-96523	K147 Kvocera Colour Copier	Kvocera Multif	WHSE	K147	sin 123	A	16/04/2020	No	No

- 1. The *Warranties for Equipment []* screen for the selected asset will open.
- 2. In this example there is only <u>one</u> warranty linked to this asset.
- 3. If there is <u>more than one</u> warranty, ensure that you select the *row* of the one that you wish to work with.
- 4. Click on *Edit*.



	-		r Equipment Kam	004 - BPO: Ve	ersion 2.4.0.11 -	- Example Con	ipany				
Home Equipmen	nt / Locations Contra	t Finance / HR Inv	entory Mainten	ance / Projects	Manufacturin	ng Procureme	ent Sales Service	Reporting	Utilities		z x
Add Edit View Sa	We Layout Workspaces	Active 👻	Refresh								
Maintain 🔺	4 Format	4 Current	4								\sim
Links #											/
Enter text to search P	WarrantyCode De	scription	WarrantyPeriod	MeterUnits	MeterBalance	SupplierCode	SupplierName	StartDate	Status		
Functions	P 8. C 8.	c	-	-	=	a n c	s 🛛 c	-	REC		
Linked Items	▶ 12MSW 12	Month Supplier Warranty	12	200000	200,000.00	SPR001	Sprint Distributors Local	14/04/2020	A		2
Warranty Claims	6										
Open Windows 🕶						Use	er : AbigailM 21/02/2021	Version : 2.4	.0.11 Ex	ample Comp	any //

- 1. The *Edit Customer Warranty []* screen will open.
- 2. Make the required changes in the relevant fields
- If you wish to make changed to the associated Site(s), click on the *Site Defaults* tab to open the frame and enable editing.
- 4. When you have made your changes, click on *Save*.



	Equipment / Locations	Edit Customer War Contract Finance / HR			BPO: Version 2.4 Manufacturing			e Reporting	Utilities		x e
Maintain 🔒 Fi	ormat 4										\Diamond
Warranty Code	12MSW	*		Marked	Description	Unit	MeterWar				
	12 Month Supplier War	east.		• 🗹	Mono meter	Copies	100000				
Description	12 Month Supplier Wan	ranty			Colour Meter	Copies	100000				
					Mono A3	Copies	0				
	Supplier Warranty	•			Colour A3	Copies	0				
	Supplier warranty	•			Clear A3	Copies	0				
Period Details					MCONMETERS	Copies	0				
Period Type	Months	▼ Period	s 12 🔹		MCONASSETS	Copies	0				
Meter unit type		 Meter Unit 									
				2 Applicable Metr	Tra Site Defaults						
Open Windows 🕶				Applicable Met	ers one beraults		AbigailM 21/02/20	21 Version : 2	.4.0.11 E	ample Comp	any j

- 1. You will return to the *Warranties for Equipment* [] screen.
- 2. *Close* this screen to return to the *Machine List for []* screen.

• •	0	Warranties for Equipment	Kam004 - BPO: Vers	ion 2.4.0.11 - Exa	ample Company			_
Home Equipm	ent / Locations Contra	ct Finance / HR Inventory M	aintenance / Projects	Manufacturing	Procurement Sa	les Service	Reporting Utilitie	s – 🗗 🗙
Add Edit View S	Save Layout Workspaces	Active Refresh						2
Maintain 🔺	Format	4 Current 4						\$
Links 4								
Enter text to search P	WarrantyCode	Description	WarrantyPeriod	MeterUnits	MeterBalance	Status		
Functions	P REC	8 0 0	-	-	-	s C		
Linked Items	 12MSW 	12 Month Supplier Warranty	12	200000	200,000.00	A		
Warranty Clams					User - Abinal	м <i>э!(лэлагай</i>)	Version : 2.4.0.11	Evample Company



NOTE ON DELETING A WARRANTY

You <u>cannot</u> delete a warranty from an asset in this screen. Follow the process to <u>open the Warranties listing</u> screen, then select the specific warranty and click on the <u>Linked Items</u> tile. In the subsequent screen, select the *row* of the asset which is to be 'unlinked' from the selected warranty and click on the *Delete* button. Save the deletion and return to the *Machine List for []* screen. When you select the row of the asset and then click on the *Warranties* tile, the asset will <u>no longer</u> be linked to the warranty.

MNU.007.019