

# PROCUREMENT

## ADD A WARRANTY CLAIM

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

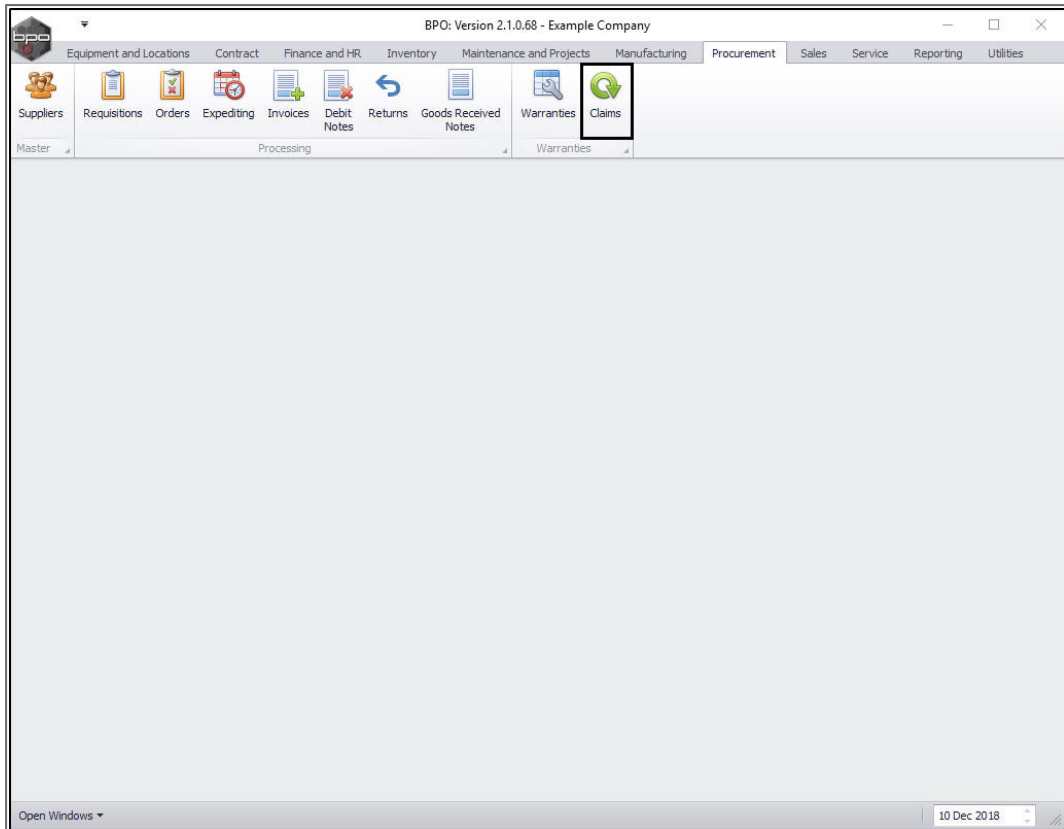
A **call must be logged**, linked to the machine under warranty, before the claim can be raised.

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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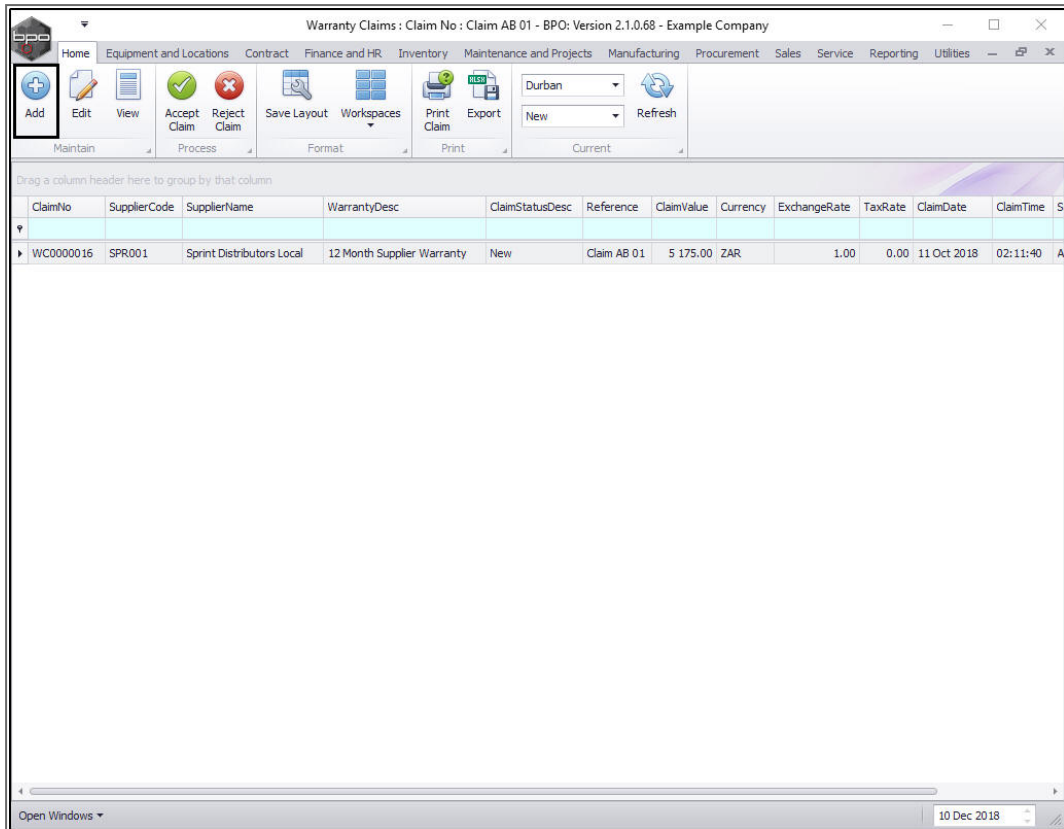
**Ribbon Access:** *Procurement > Claims*

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

- Click on **Add**.



## 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

Salesman

Reference

Claim Date/Time

Currency

Tax Rate

Exchange Rate

RefType	ReferenceType	ReferenceNo
▶ ASMN	Serial No	<input type="text"/>
CALL	Call Reference	<input type="text"/>
CTRTR	Contract No	<input type="text"/>

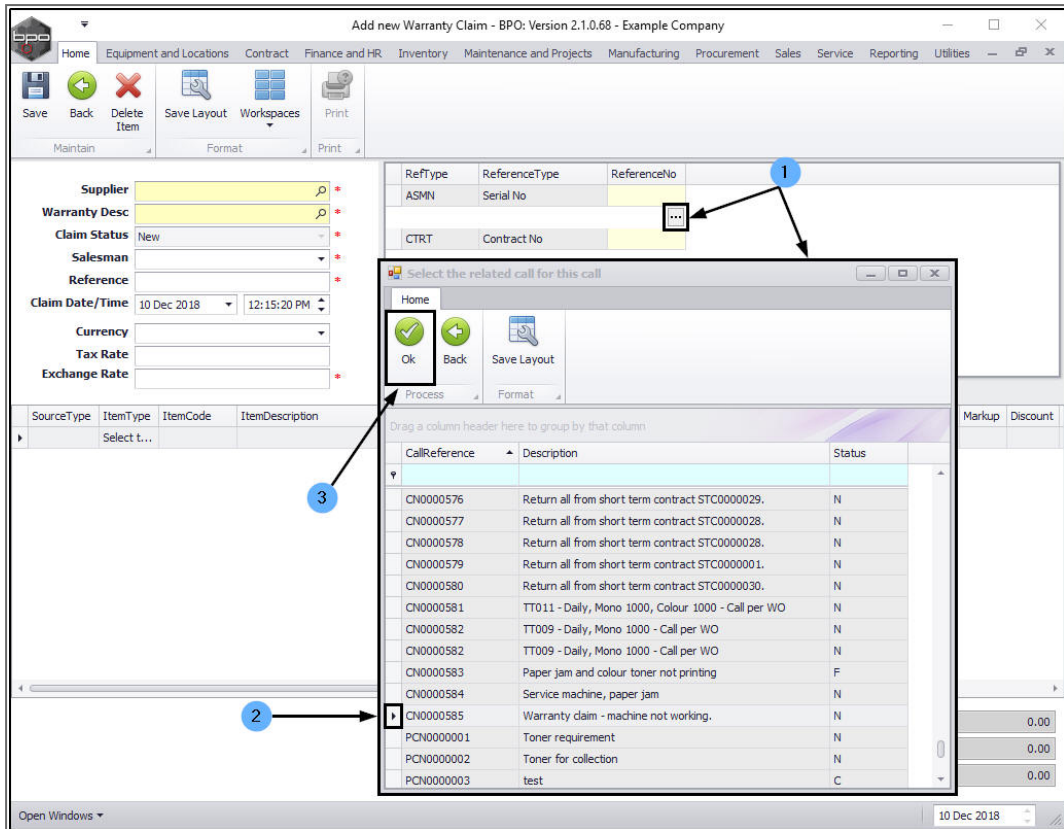
Addresses Related References

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

Qty  Sub Total   
 VAT   
 Grand Total

Open Windows 10 Dec 2018

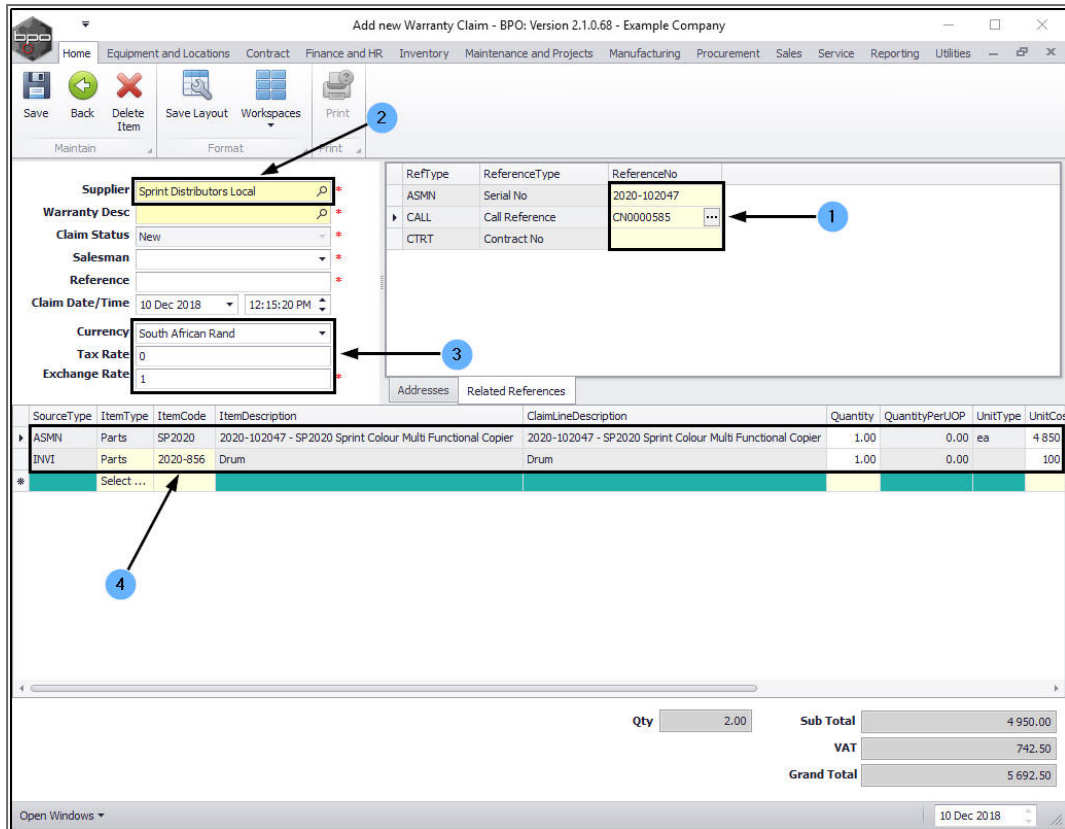
1. An ***ellipsis*** button will be revealed. Click on the button to display the ***Select the related call for this call*** pop up screen.
2. Click on the ***row selector*** in front of the linked call.
3. Click on ***Ok***.



## 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.



## 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: [Empty]

Claim Status: New

Salesman: [Empty]

Reference: [Empty]

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	UnitCos
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

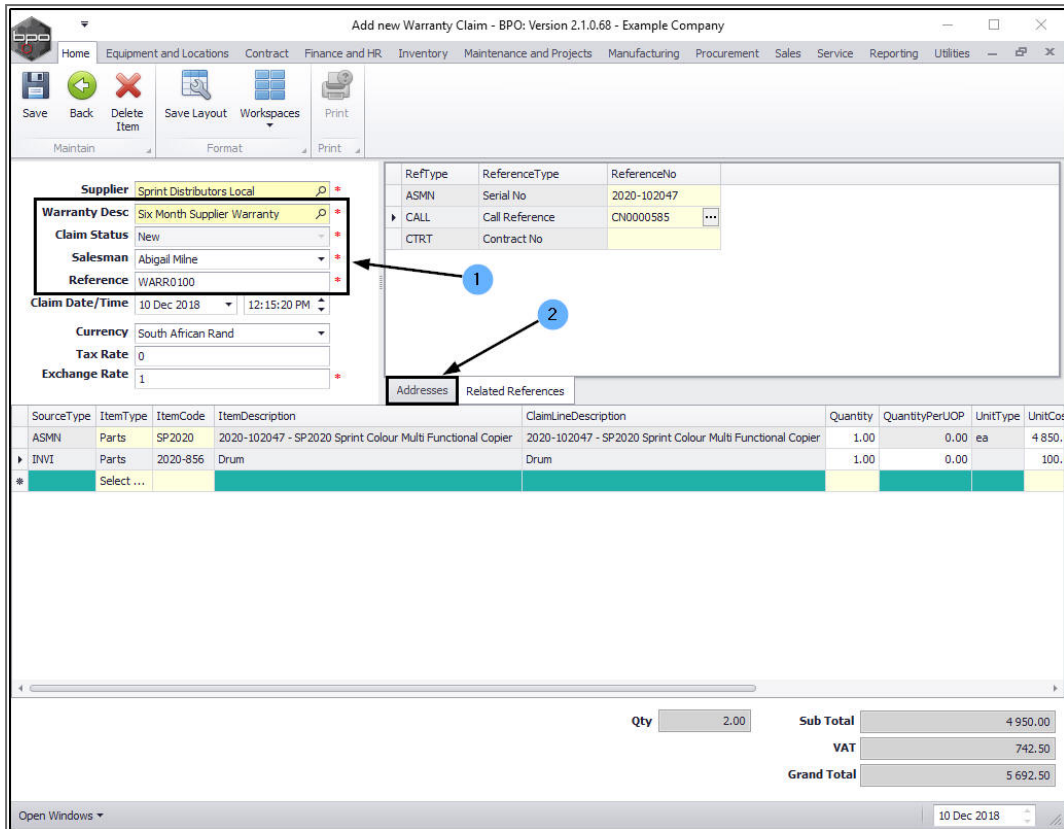
VAT: 742.50

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.



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

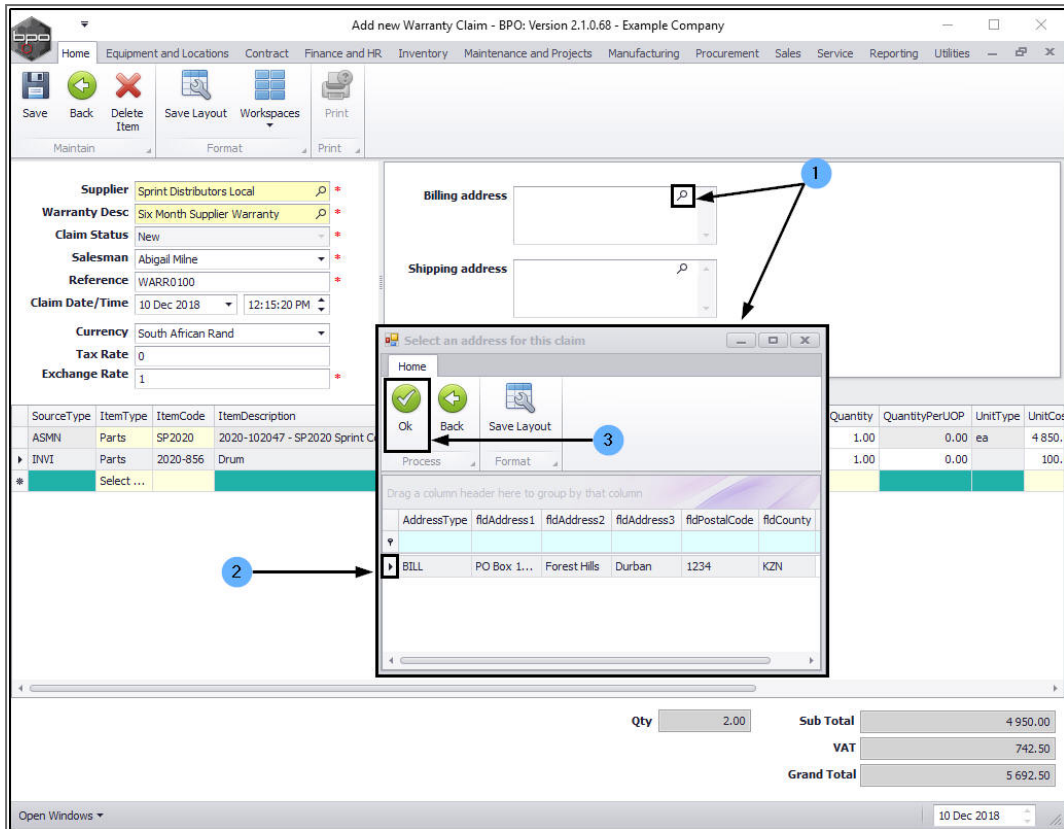
Addresses | Related References

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCos
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.
INVI	Parts	2020-856	Drum	Drum	1.00	0.00		100.
*	Select ...							

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

Open Windows | 10 Dec 2018

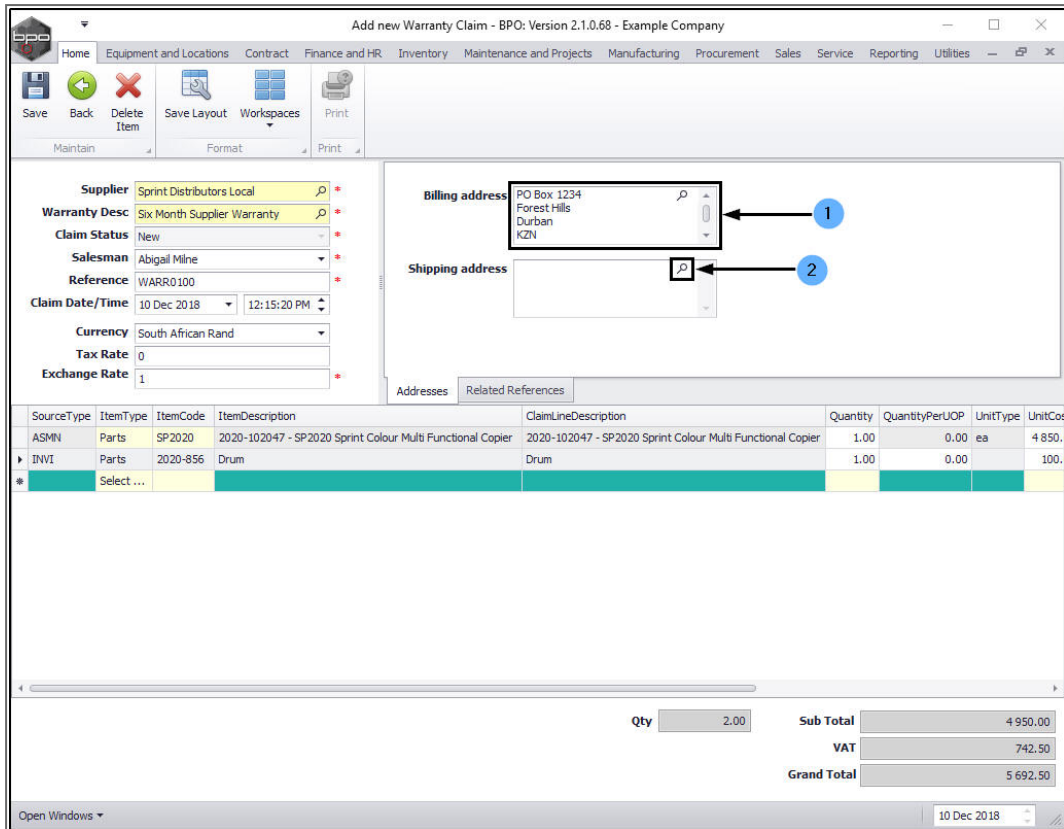
1. The **Select an address for this claim** screen will pop up.
2. Click on the **row selector** in front of the correct billing address
3. Click on **Ok**.



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**.



## 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

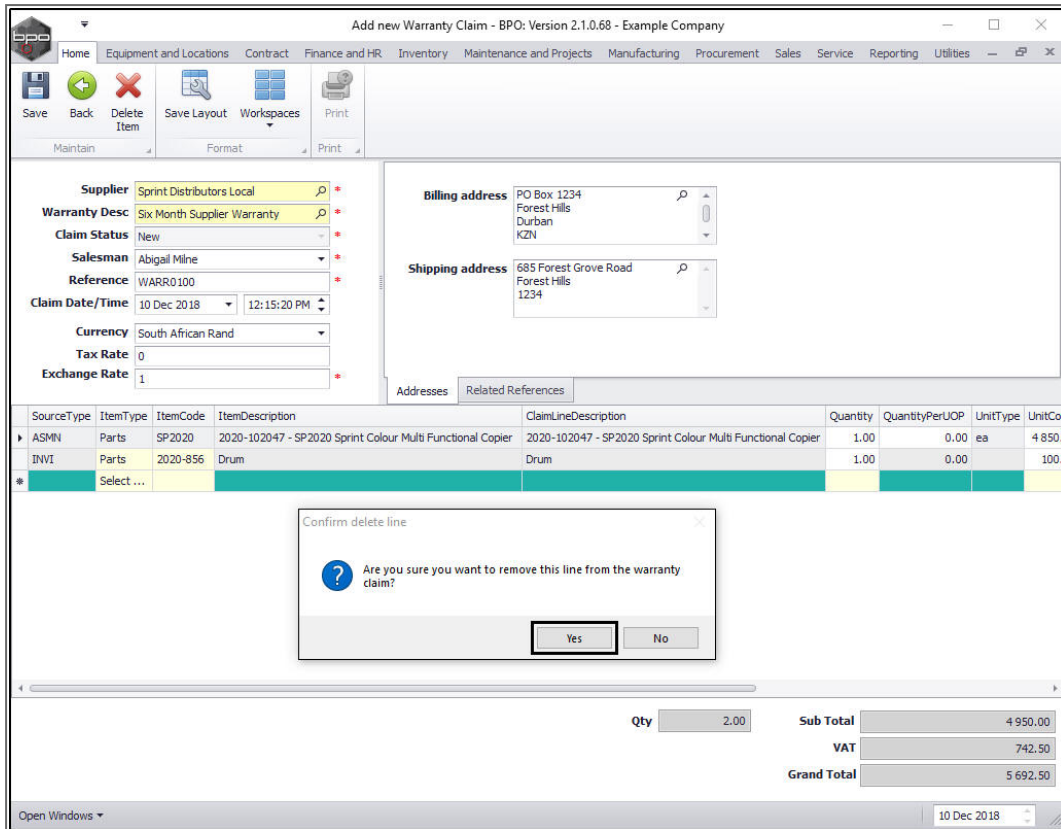
Billing address: PO Box 1234, Forest Hills, Durban, KZN  
 Shipping address: 685 Forest Grove Road, Forest Hills, 1234

SourceType	ItemType	ItemCode	ItemDescription	ClaimLineDescription	Quantity	QuantityPerUOP	UnitType	UnitCos
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**.



- 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

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

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

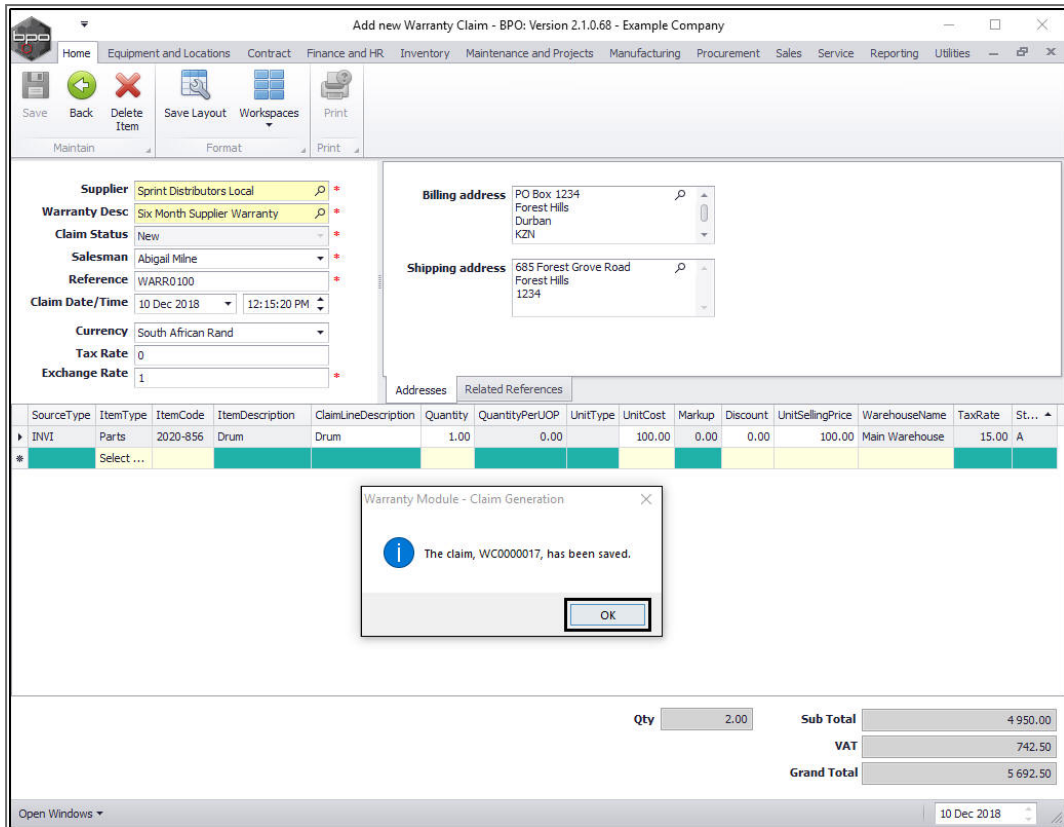
Sub Total: 4 950.00

VAT: 742.50

Grand Total: 5 692.50

Open Windows 10 Dec 2018

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



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.

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	Abi
WC0000017	SPR001	Sprint Distributors Local	Six Month Supplier Warranty	New	WARR0100	115.00	ZAR	1.00	0.00	10 Dec 2018	12:15:20	Abi

MNU.133.001