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

EQUIPMENT
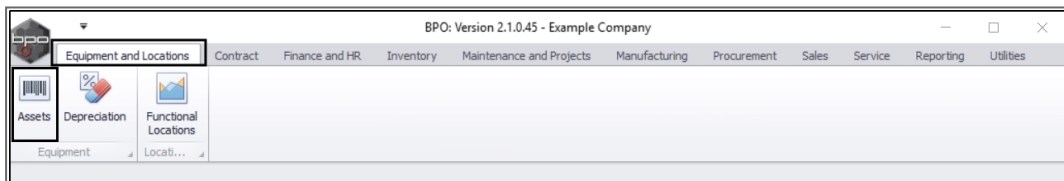
ASSETS – WARRANTIES – VIEW, ADD, EDIT

Warranties can be assigned:

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

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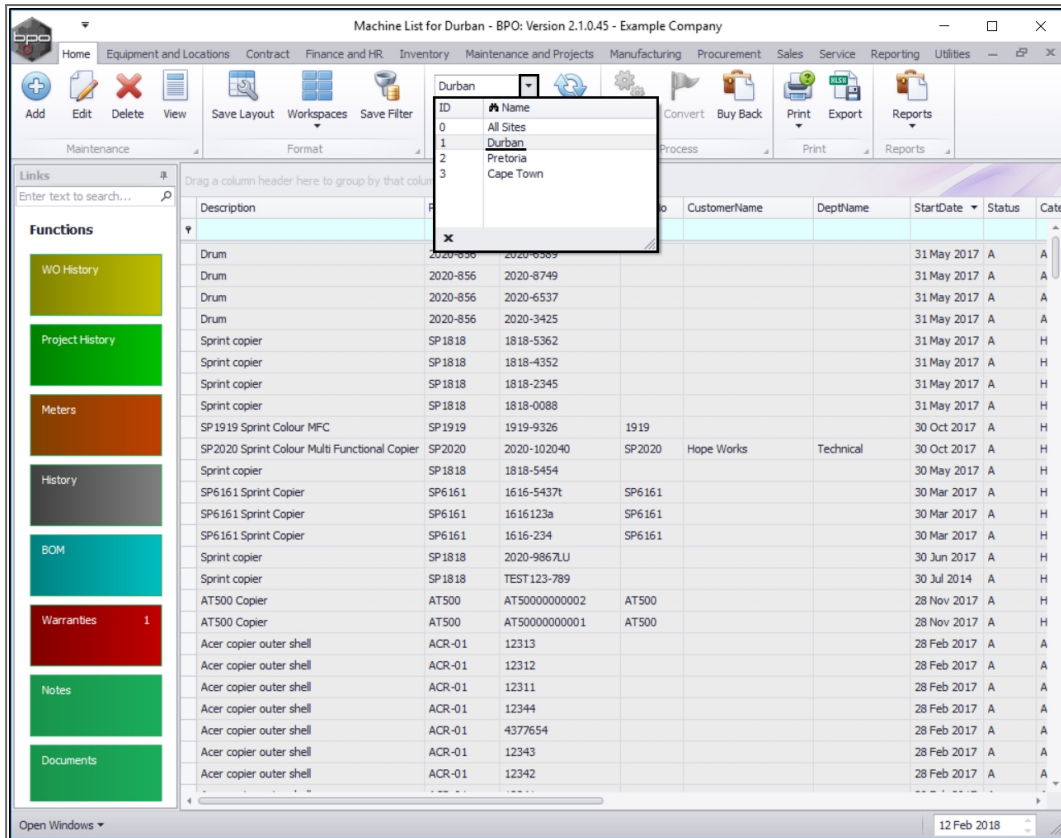

Ribbon Access: Equipment and Locations > Assets

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.

1. 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.
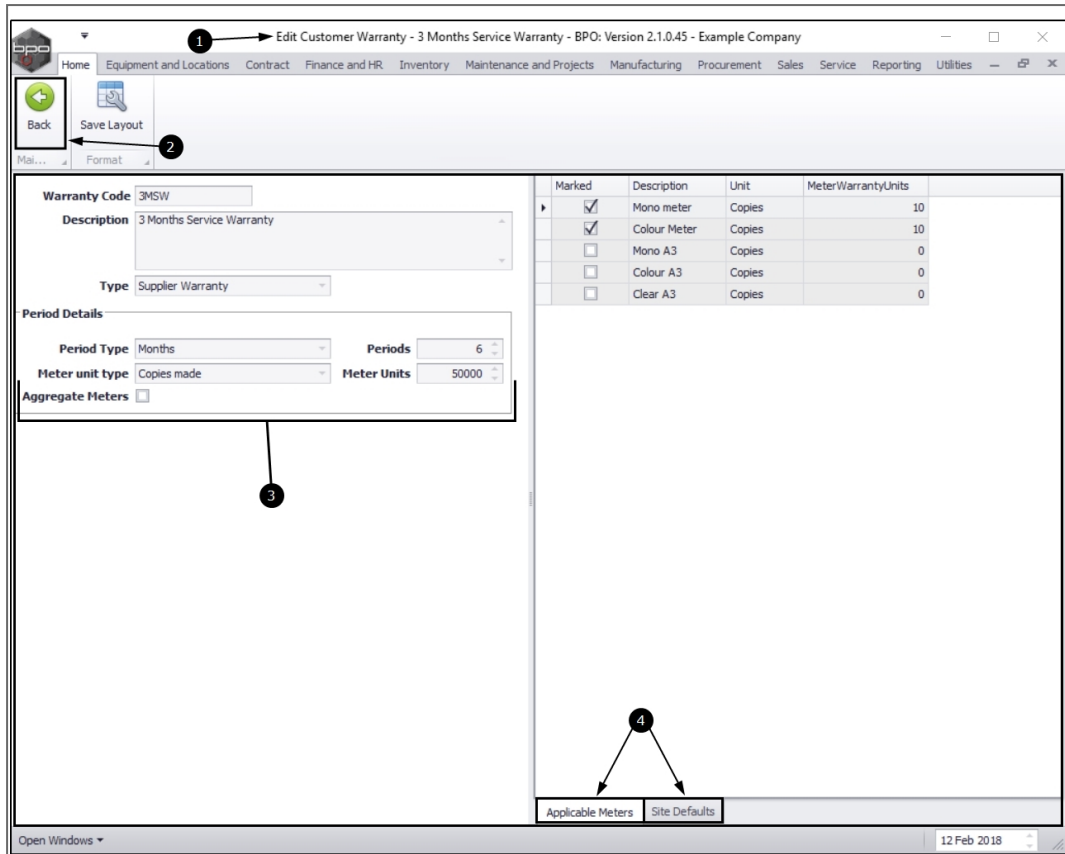3. Click on the **Warranties** tile.
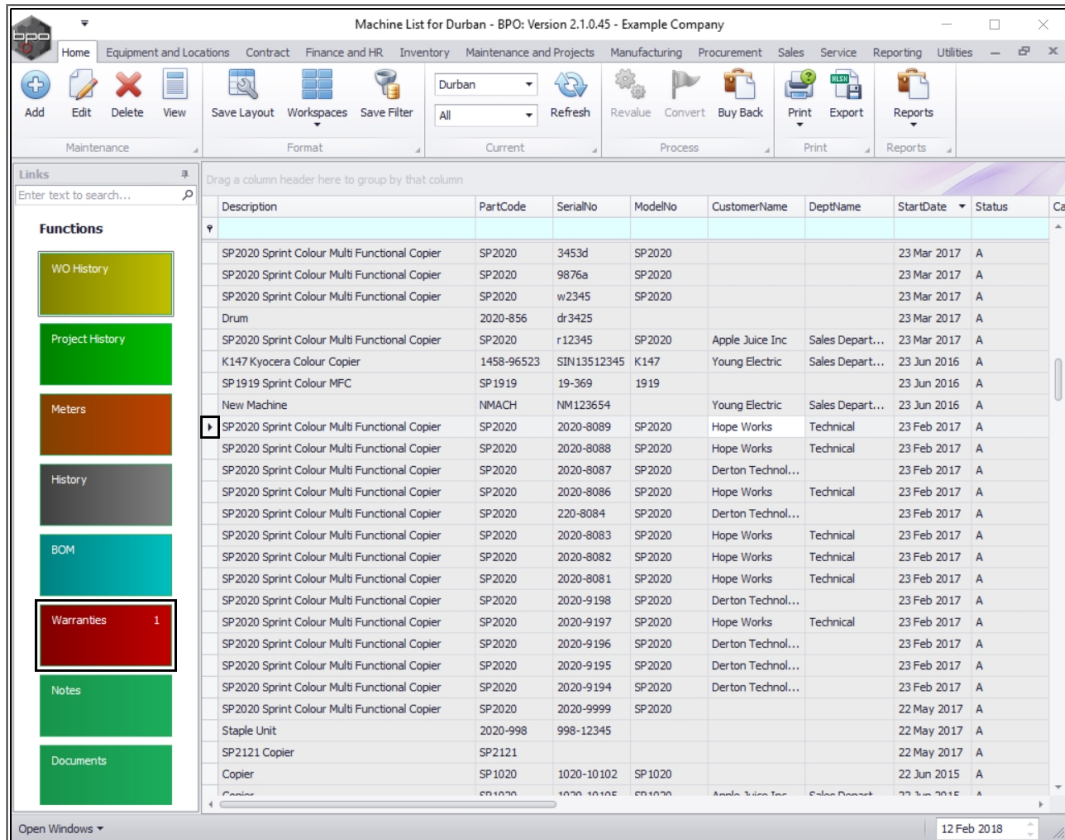
VIEW WARRANTY

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.
2. If there is more than one linked warranty in the list, select the **row** of the warranty that you wish to view.
3. Click on **View**.
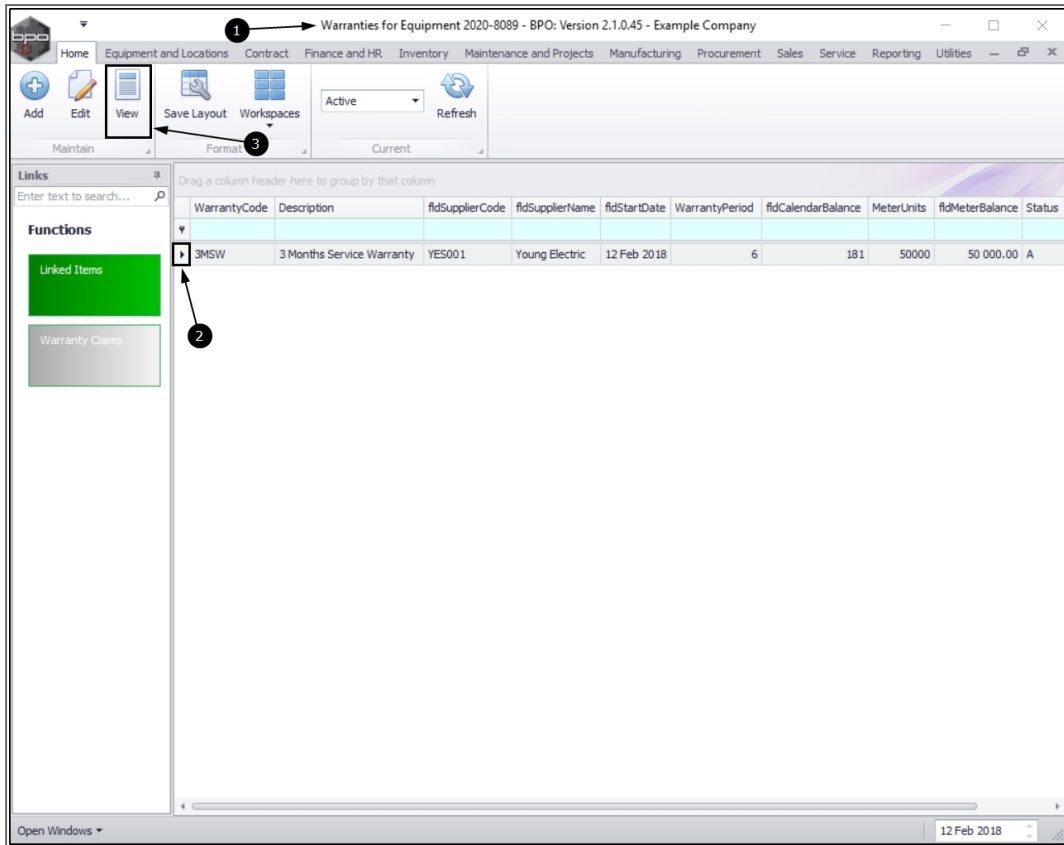
1. The **Edit Customer Warranty - []** screen will open.
2. As you clicked on the **View** button to open this screen (and not the **Edit** button), all the information in this screen is **uneditable**. There is a **Back** button but <u>no</u> **Save** button.
3. Here you can view the selected warranty 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.
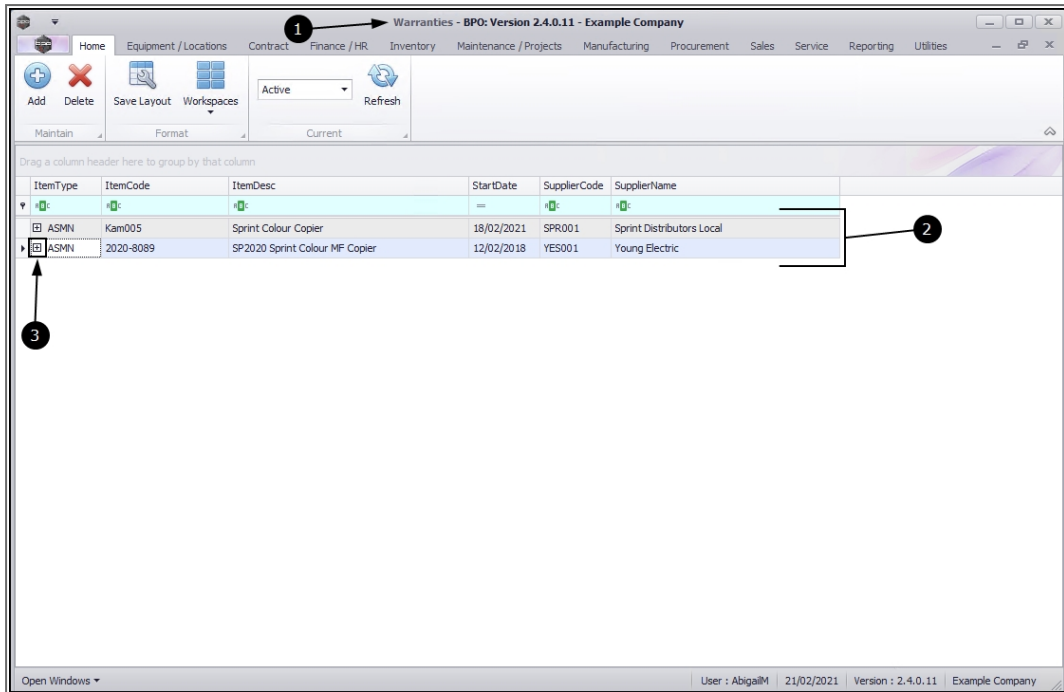
VIEW LINKED ITEMS

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.
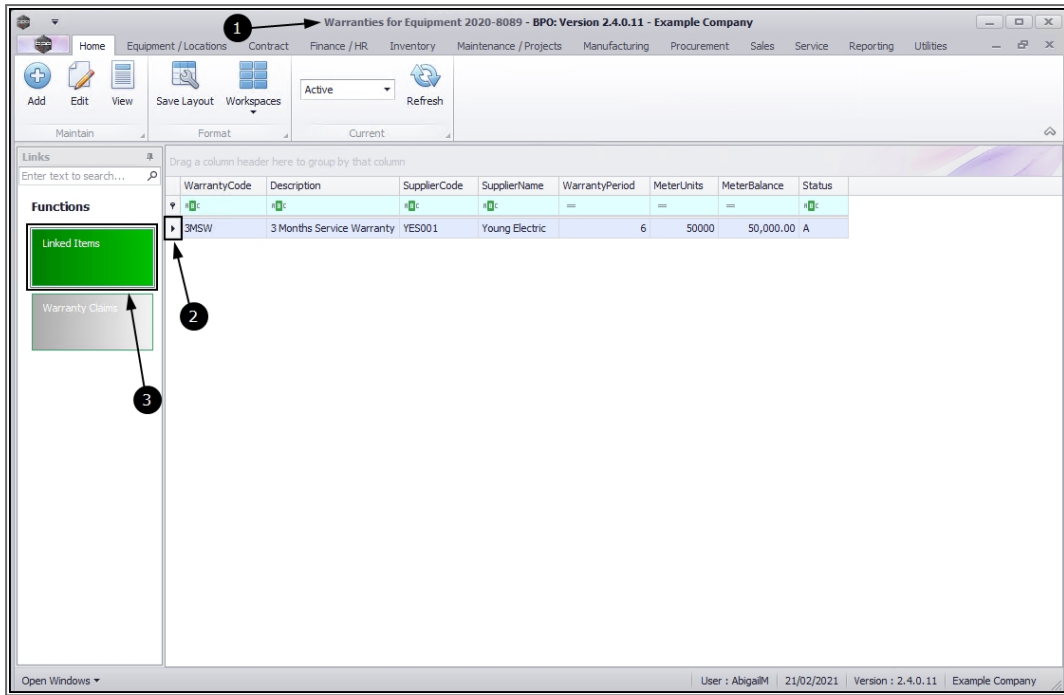
1. The **Warranties** listing screen will open. The list will <u>only</u> display the items linked to the selected warranty.

2. In this example there are **2** items currently linked.

    - **Note**: From this screen you can also follow the process to <u>add another customer asset to this warranty</u>, if required.
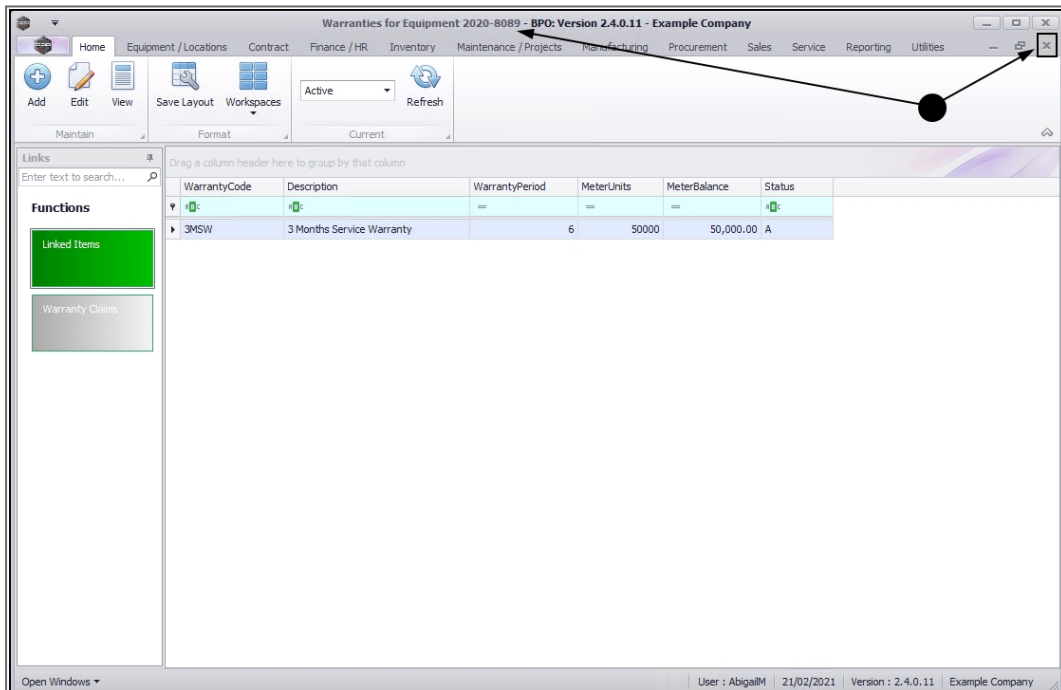
VIEW METERS OF THE LINKED ITEMS

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

1. You will be able to view the linked **Items Meters** in the expanded frame.
2. Collapse the frame and **Close** the screen to return to the **Warranties for Equipment []** screen.
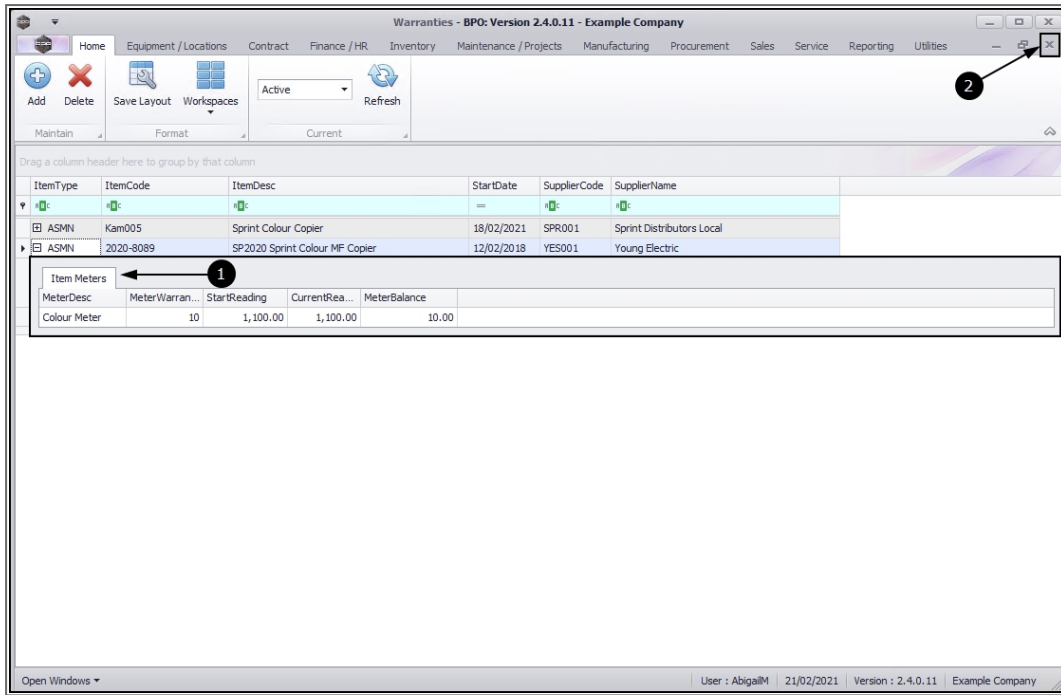
Close the **Warranties for Equipment []** screen to return to the **Machine List for []** screen.
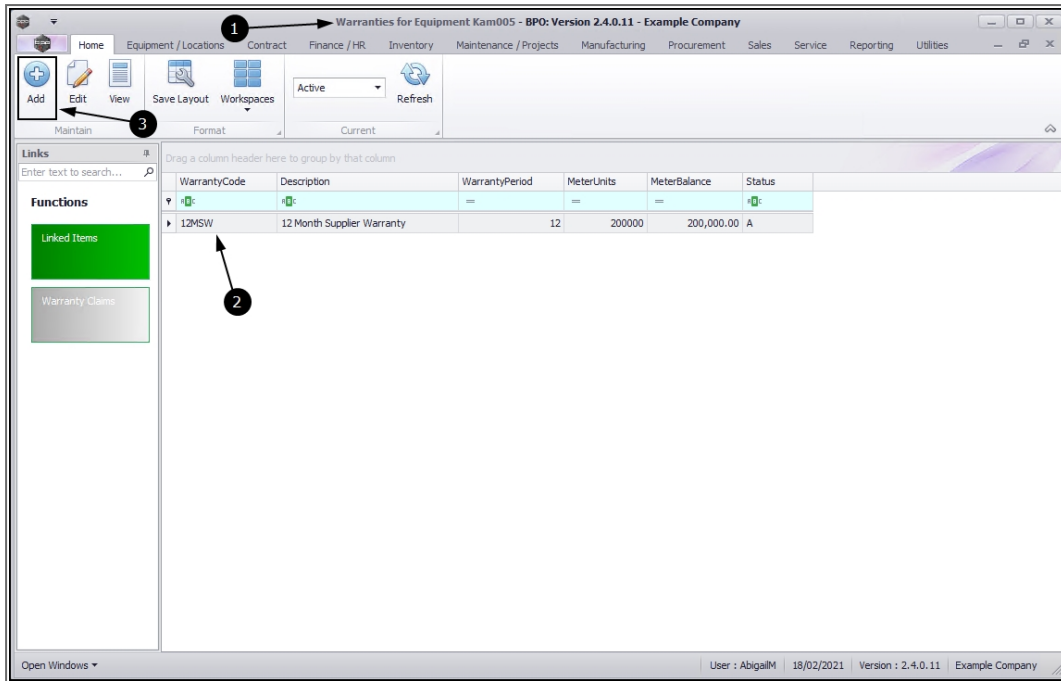
ADD A WARRANTY

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

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

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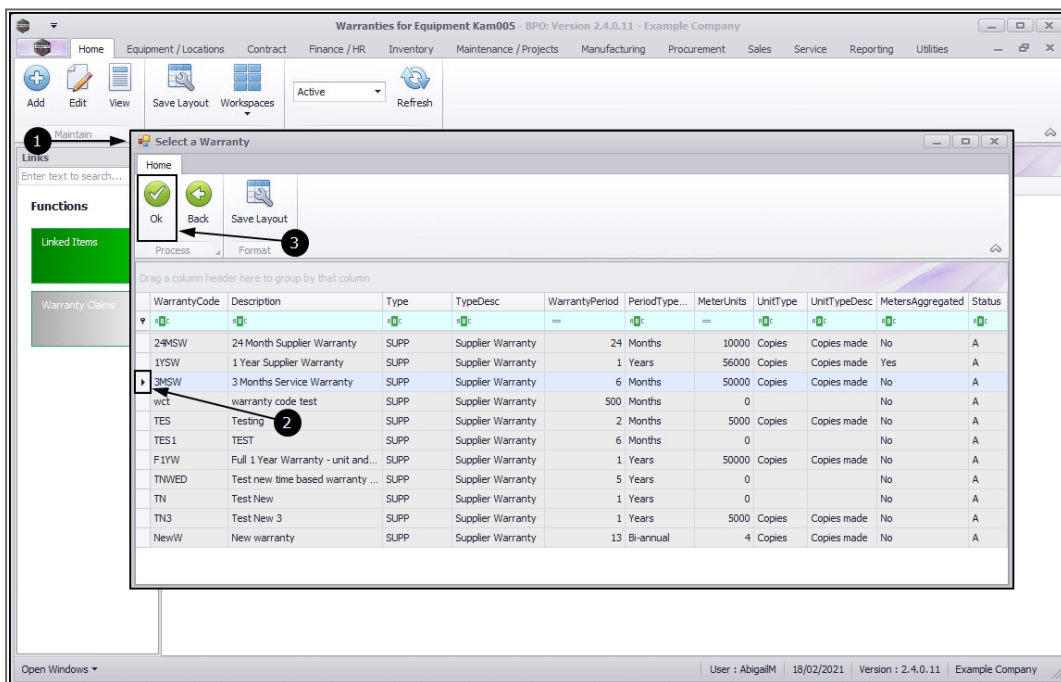
1. The **Add New Warranty Association** screen will open.

WARRANTY DETAILS

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

ASSET

3. This will populate with the asset **Serial No.**, **Part Description** and **Model No.**, if applicable.
   - 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 <u>warranty definition</u>.
   - **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.
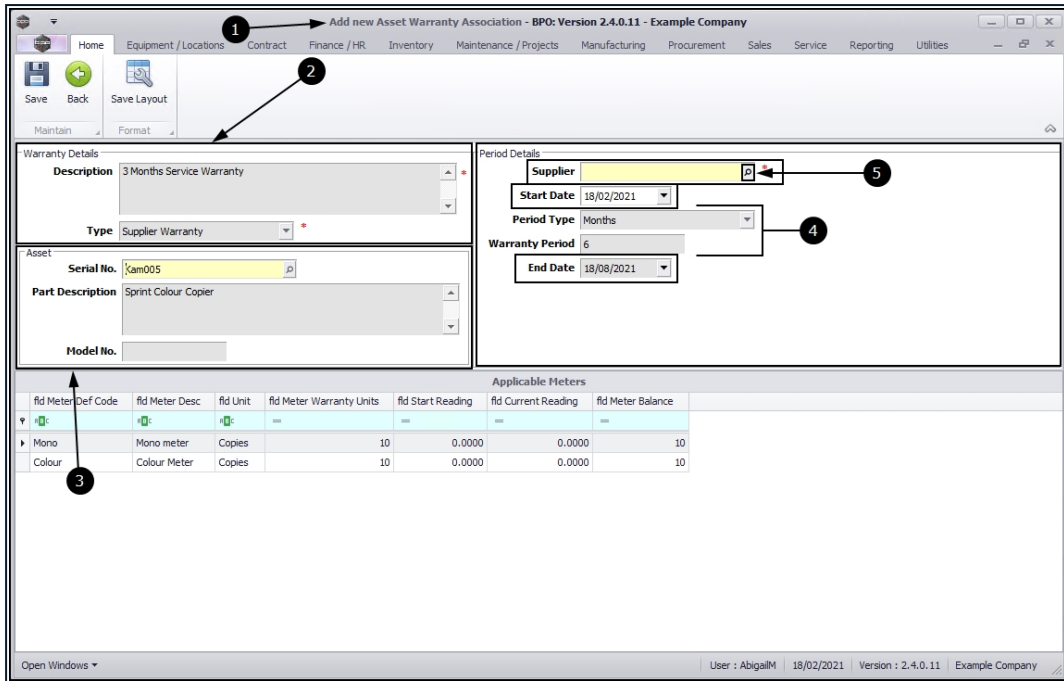
1. The **Select the Supplier** screen will pop up.
2. Select the **row** of the supplier that you wish to link to this warranty.
3. Click on **Ok**.
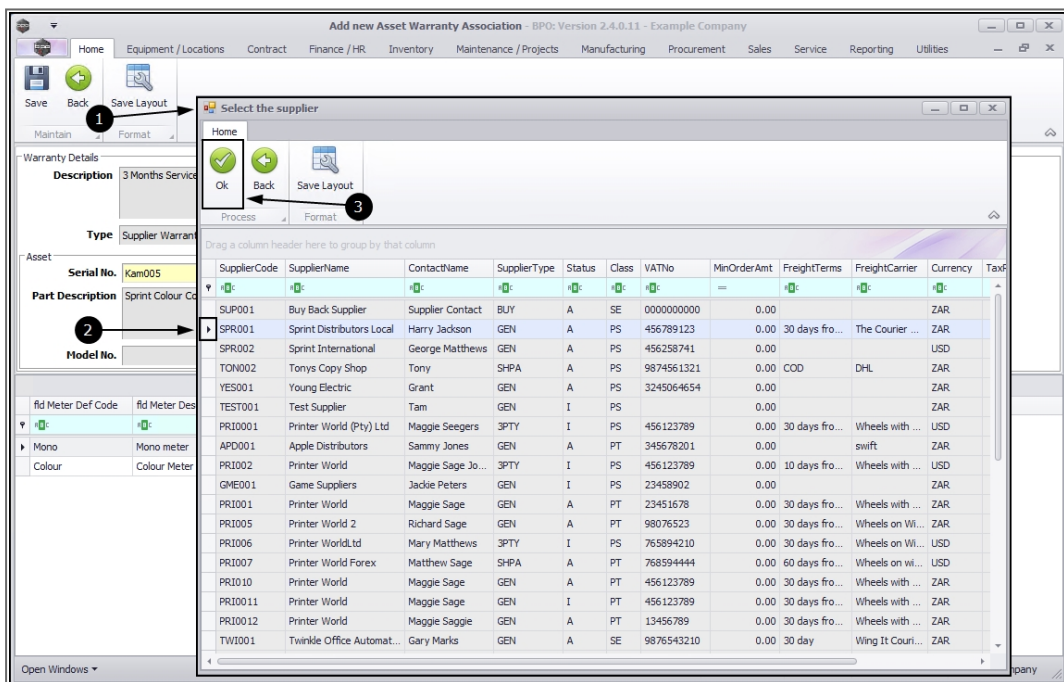
1. The **Supplier** field will now populate with the selection in the previous step.
2. Note that the **Start Date** will populate with the <u>current</u> date and in this example, the **End Date** will auto populate **6** months after the Start Date, as the Warranty Period is 6 months.
    - If it was a **12** month Warranty Period then the End Date will auto populate **12** months after the Start Date.
3. 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**.
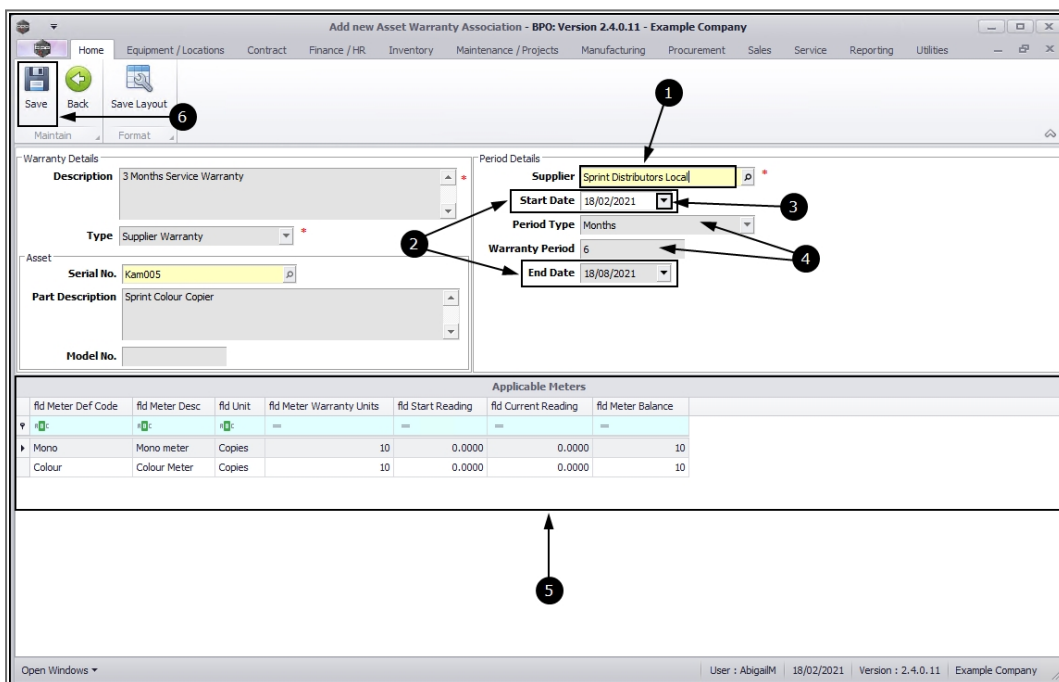
1. You will return to the **Warranties for Equipment []** screen.
2. The added warranty can now be viewed in this screen.
3. Close this screen to return to the **Machine List for [] screen.**
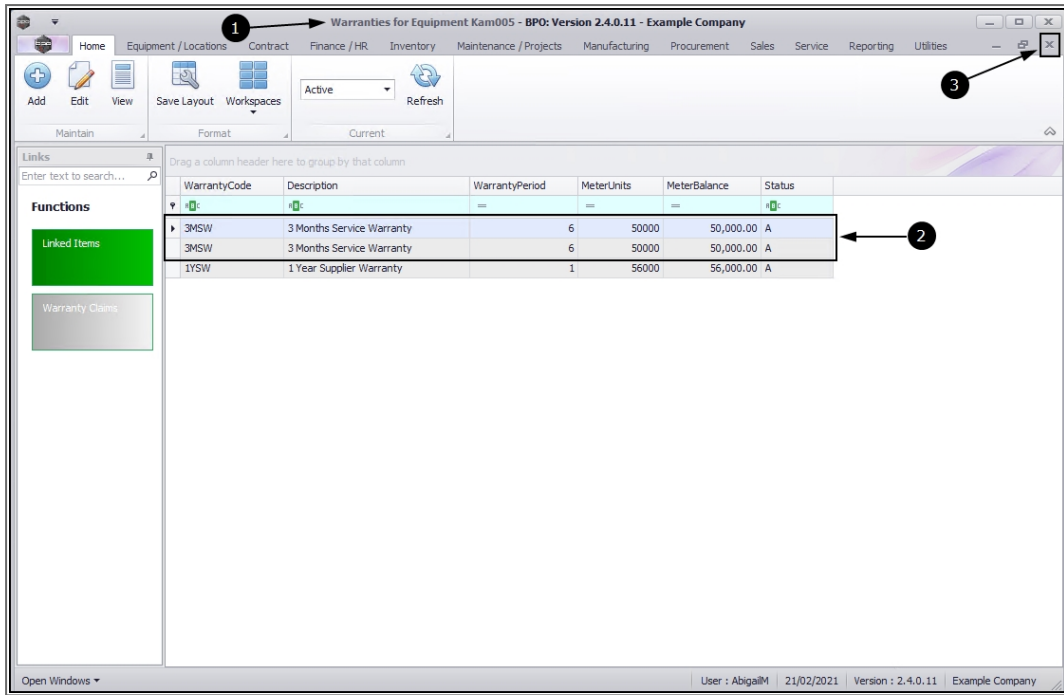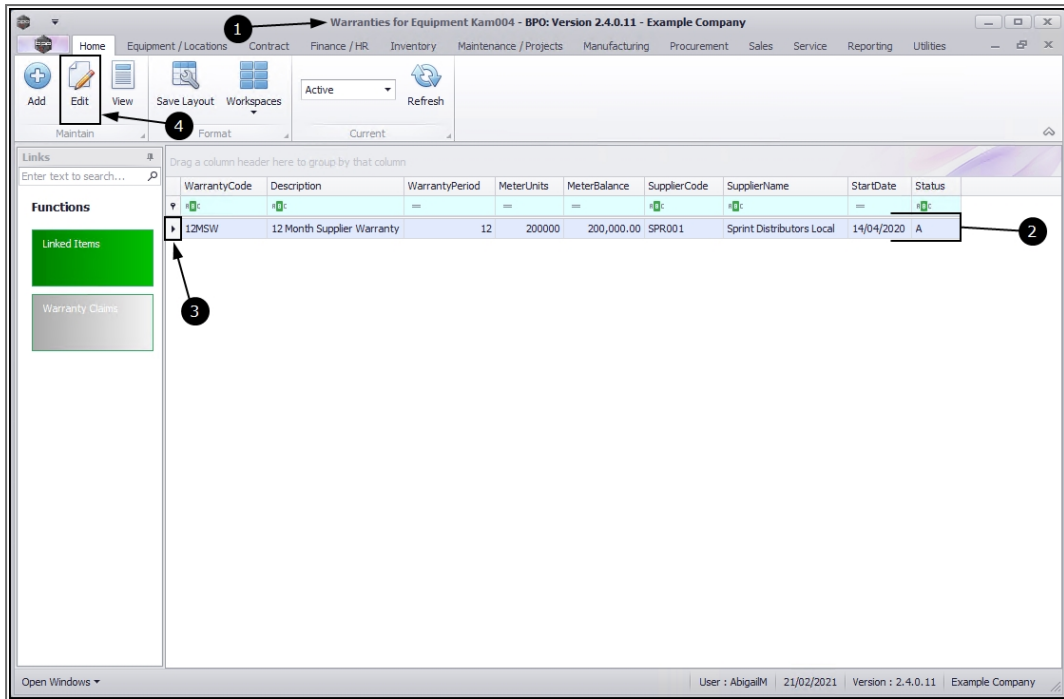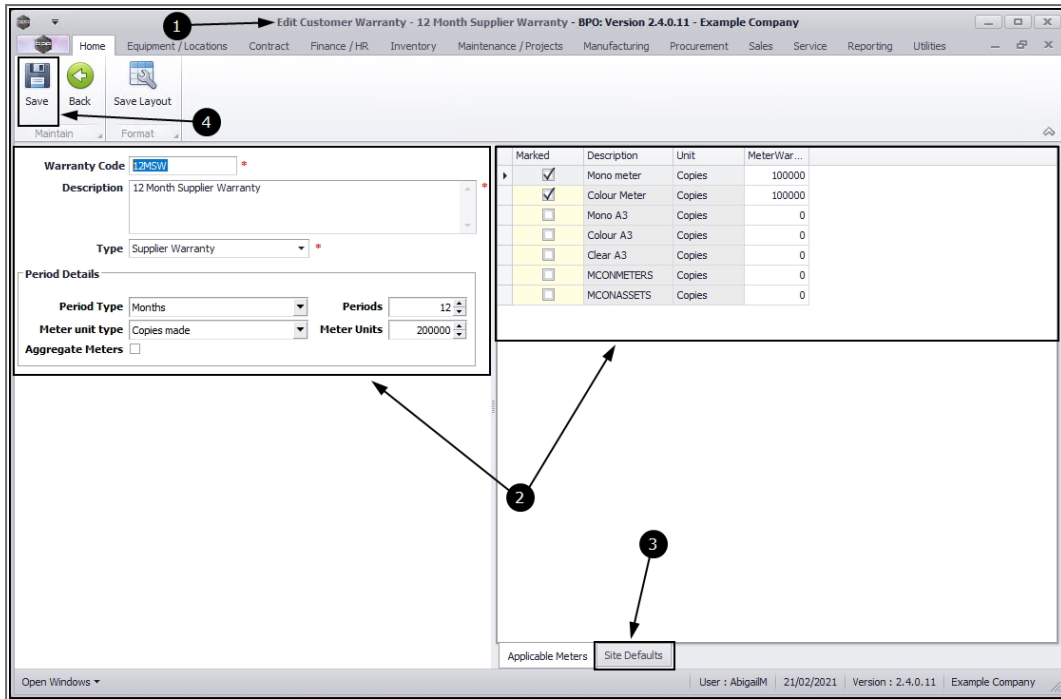
EDIT A WARRANTY

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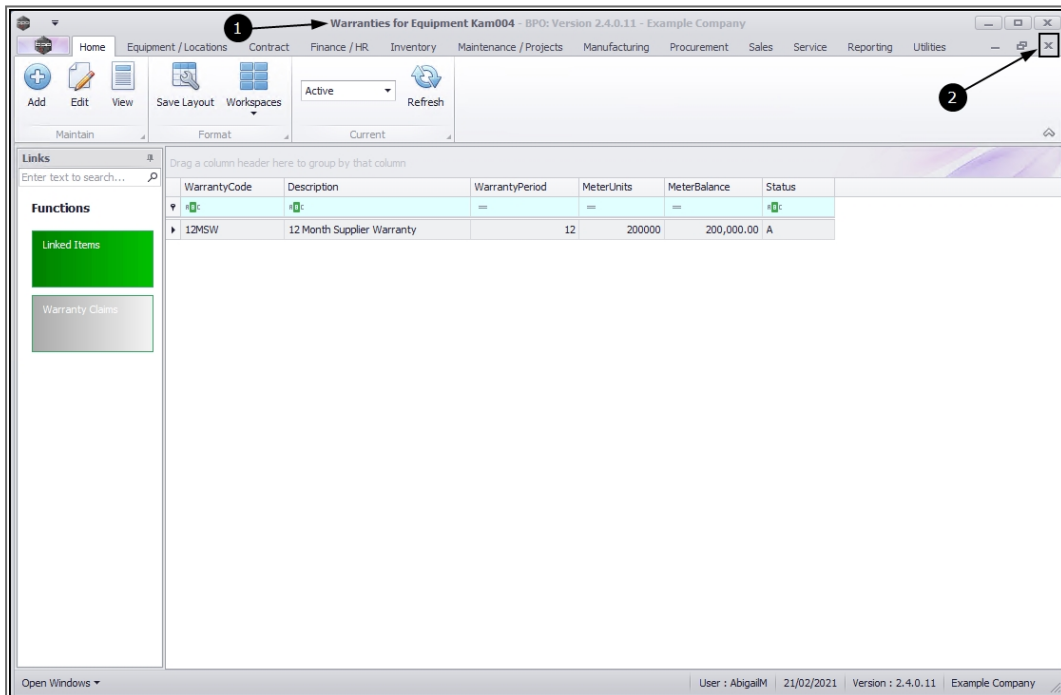4. Click on the **Warranties** tile.
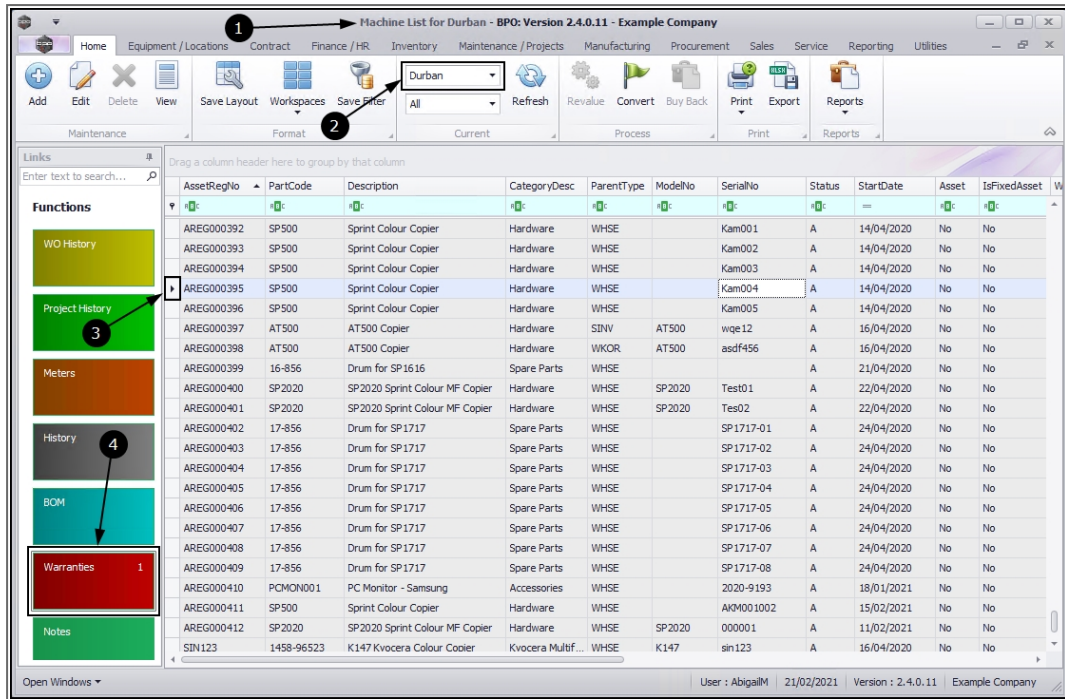
1. The **Warranties for Equipment [ ]** screen for the selected asset will open.
2. In this example there is only <u>one</u> warranty linked to this asset.
3. If there is <u>more than one</u> warranty, ensure that you select the **row** of the one that you wish to work with.
4. Click on **Edit**.

1. The **Edit Customer Warranty - [ ]** screen will open.
2. Make the required changes in the relevant fields
3. 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**.

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

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