

Version 25



Trapeze
Enterprise Asset Management

Warranty

Administrator Guide

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Technical Support

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Customer Care is available Monday through Friday, 8:00 a.m. to 8:00 p.m., Eastern Standard Time.

Toll-Free Telephone: 1-877-411-8727

E-mail: cc@trapezegroup.com

FTP Site: <https://ftps.trapezegroup.com/>

Web Site: <https://collaborate.trapezegroup.com>

The website provides access to Trapeze Collaborate which offers resources to implement and operate the software, search knowledge, participate in communities, log/track service requests, sign-up for release alerts, view product health recommendations, and download updates or documentation. For secure access to Collaborate, contact Customer Care through the website or by calling the number above.

Product Compatibility

Refer to the latest [Product Compatibility](#) information on Trapeze Collaborate for requirements including operating system information, databases, Crystal reports, network protocol, HTTP servers and browsers that are supported.

Warranty - Administrator Guide

Version 25.x

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1. Overview

Use the Warranty Module to manage equipment, component, commercial and parts warranty opportunities and track the process from claim creation to collection.

- Identify
- Claim
- Track
- Reconcile

The Warranty Module provides organizations with a real-time, interactive environment where claims resulting from work order closeouts will be available for write-up immediately after the maintenance shop closes/approves the work order. It provides an electronic area for warranty claim write-up and submission to manufacturers, while providing warranty supervisors with full visibility into all aspects of the claim handling workflow. The main Warranty Portals include:

Warranty Supervisor Portal: Allows warranty supervisors to review pending claims, update/reprioritize the to-do queue, and monitor status of all claims in all branches of the workflow.

Warranty Writer Portal: Provides warranty writers with an easy, electronic workbench where all of the detail regarding the claims, manufacturer coding, proper claim amounts, validation of part IDs and claim amounts are entered via a web portal.

Warranty Processor Portal: Once the warranty writer marks a claim as being ready for submission to the manufacturer, the claim is made available to the processing clerks via this portal. The portal provides a clear, efficient way for processing clerks to view what claims need to be processed, review full detail about those claims, and mark claims as having been successfully submitted.

Requirements

Application 25.x

Web Modules 25.x

Assumptions

Familiarity with workflow and configuration of the application.

- ❗ User defined required fields that do not appear in Web Modules will return validation messages.
- ❗ Special characters cannot be placed into the Web Modules fields or unanticipated results may occur. These include any character that you cannot type with a standard keyboard.
- ❗ Do not use the browser's **Back** button as unanticipated results may occur.
- ❗ Do not open or use the same instance of the web portals in multiple browser windows or tabs. This can cause errors or unexpected performance issues.

2. Preliminary Data Setup

Prior to using the Warranty Module, it is necessary to setup the data.

Warranty Status ID Setup

1. From the Enterprise Portal Main Menu, go to **WARRANTY > STATUSES**.
2. Click **Reload** and then click **Apply Filter** in the new window to view the Warranty Status list.

Row #	Warranty status	Indicates settlement	Indicates claim is closed
1	APPROVED	Y	N
2	CAMPAIGN	Y	Y
3	DAMAGED IN SHIPPING	N	Y
4	DENIED	Y	Y
5	DID NOT FIX PROBLEM	N	Y
6	DID NOT SEND	N	Y

3. Click on any line item to adjust the default settings in the **Basic Info** tab below the list.
4. Verify the following Warranty Statuses: COMPLETE, IN PROCESSING, NON WARRANTY, ON HOLD, RETURNED TO SHOP, SENT TO PROCESSING, IN PREPARATION, RETURNED TO WARRANTY, and SENT TO VENDOR. All statuses should have the option **Indicates claim is closed** as **N** except for NON WARRANTY, which should be **Indicates claim is closed** is **Y**.
5. To add additional statuses click **New**.
6. Click the drop down arrow to the right of the status field and select from the list of options.
7. Then, check the appropriate boxes in the Basic Info tab and click **Save**.

☐	Indicates settlement
☐	Indicates claim is closed

Warranty Options Setup

Warranty options must also be set in the Enterprise Portal. To setup the Warranty Options, open the Warranty – Setup – Options screen.

The screenshot displays the 'Warranty - Setup - Options' interface. At the top, there's a header with 'Warranty - Setup - Options', 'ADMIN MODE', and 'CHANGE R'. Below the header is a toolbar with 'Search', 'Reload', 'Sort', 'Select Filter', 'Select Sort', 'New', 'Copy', 'Delete', and 'Edit' buttons. The main content area is titled 'Warranty management options' and contains a section for 'Options'. This section includes two checkboxes: 'Automatically number manually entered warranty claims' and 'Disable pop-up messages when equipment claim is automatically created'. Below these are two text input fields for 'Default warranty claim status' and 'Default core claim status'. At the bottom, there are two rows of dropdown menus. The first row is for 'Require details by task or only overall totals' with 'Claim' and 'Settlement' columns. The second row is for 'Require details by cost type or only overall totals' with 'Claim' and 'Settlement' columns.

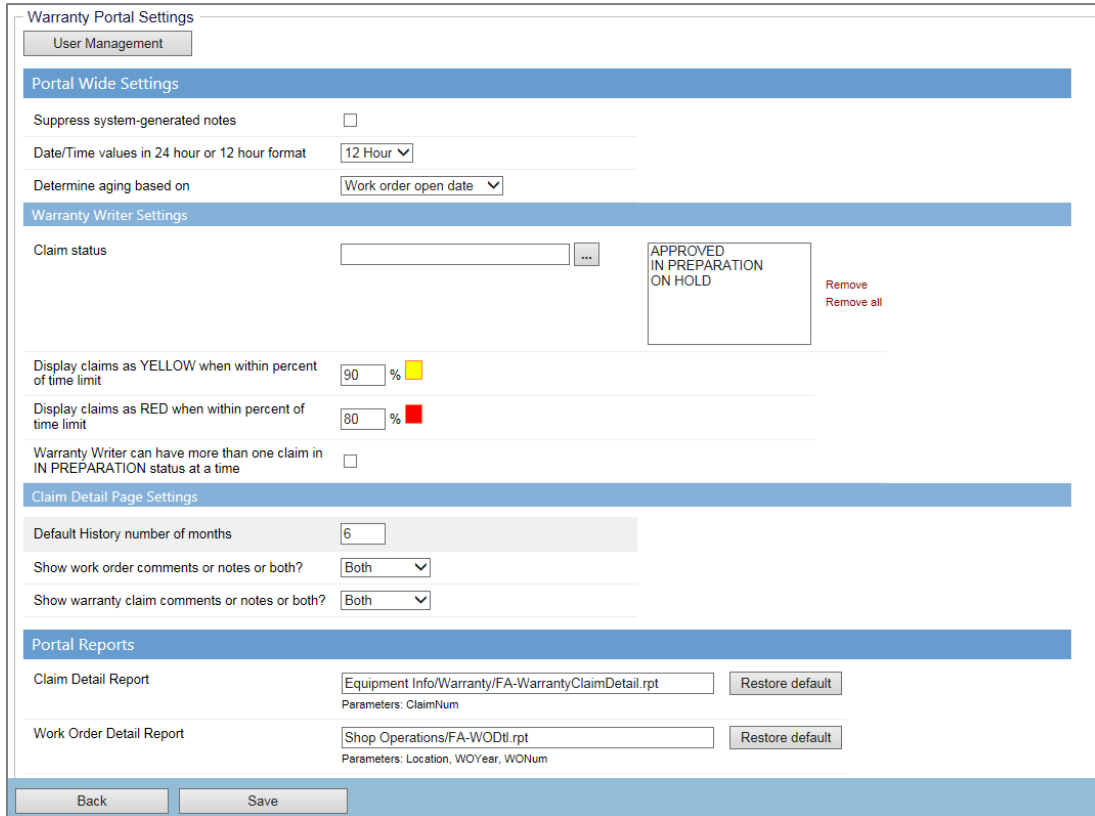
- It is recommended to set the **Default warranty claim status** to PENDING.
- Set **Require detail by task or only overall totals** to TASK for both claim and settlement.
- Set **Require details by cost type or only overall totals** to DETAILS for both claim and settlement.

3. Warranty Portals Setup

Open the Warranty Writer tab. If your user ID has access to perform setup, a  will appear next to the portal name.

 Click the pencil icon to go to the settings page.

 It is necessary to setup the Warranty Module in each of the three portals (Warranty Writer, Warranty Processor, and Warranty Supervisor). The primary difference between the modules is that the Warranty Writer Portal Settings page has additional Writer Settings.



Warranty Portal Settings

User Management

Portal Wide Settings

Suppress system-generated notes ☐

Date/Time values in 24 hour or 12 hour format 12 Hour

Determine aging based on Work order open date

Warranty Writer Settings

Claim status APPROVED IN PREPARATION ON HOLD Remove Remove all

Display claims as YELLOW when within percent of time limit 90 %

Display claims as RED when within percent of time limit 80 %

Warranty Writer can have more than one claim in IN PREPARATION status at a time ☐

Claim Detail Page Settings

Default History number of months 6

Show work order comments or notes or both? Both

Show warranty claim comments or notes or both? Both

Portal Reports

Claim Detail Report Equipment Info/Warranty/FA-WarrantyClaimDetail.rpt Restore default
Parameters: ClaimNum

Work Order Detail Report Shop Operations/FA-WODtl.rpt Restore default
Parameters: Location, WOYear, WONum

Back Save

The Warranty Portal Settings page is divided into the following sections:

User Management

To define warranty writers, warranty processors, and authority for each user, perform the following steps:

1. At the top of the Settings page, click **User Management**.

This opens the Manage Users screen.

Manage Users

☒ All Users ☐ Warranty Writers ☐ Warranty Processors

	User ID	Name	Warranty Processor	Warranty Writer	Locations	Vendors
Edit Delete	BJSMTIH	SMITH, BOBBY J	N	N	P AND W	1020381-32605
Edit Delete	CANG5	WARRANTY WRITER	N	Y	CNLOC1	CNVENDOR001
Edit Delete	LJOHNSON1	JOHNSON, LARRY	N	N	S120	TMJ-VEND-CONTRA
Edit Delete	RG01	RG1	Y	Y	ALL	ALL
Edit Delete	SALEXAND	STEPHEN ALEXANDER	N	N	MAIN	1000-1322
Edit Delete	TMJ	TALINA	Y	Y	BSLOC1, CNLOC1, TMJ-LOC	ALL

Back Add User

This page allows you to edit, delete, and add users while assigning authority to each. You may select various radio buttons to sort the list by All Users, Warranty Writers, or Warranty Processors.

2. To edit a user, click **Edit**. The User Detail popup displays.

Manage Users

User ID: AC ANTHONY CARTWRIGHT

☒ Warranty Writer ☒ Warranty Processor

Supported Locations

☐ Supports All Locations

Delete Location

☐	ACLOC1	CARTWRIGHT HEAVY EQUIPMENT
☐		

Supported Vendors

☒ Supports All Vendors

Delete Vendor

☐	AC-VENDOR	CARTWRIGHT FULL SERVICE
☐		

Cancel Save

This popup allows you to select the roles for the user as well as the locations and vendors that the user supports.

3. If the user supports all locations and vendors, check the **Supports all Vendors** box. Otherwise, if the user supports specific locations and vendors, click the  button to select specific locations and vendors.
4. Edit the information as desired and click **Save** to save your edits. The Manage Users page will display the updated information.

 **Note:** Setting up the users in one portal, creates them across all three Warranty Portals.

5. To delete a user, click **Delete** next to the user you want to delete. The user will be removed from the list.

 **Note:** This does not remove the User from the system; it only removes the user from the Warranty users list.

6. To add a user, at the bottom of the page, click **Add User**. The User Detail popup will display as shown above.

- i. Enter the User ID or click the  button to select a user from the list.
- ii. Check the box for Warranty Writer and/or Warranty Processor.
- iii. Check the box for Supports all locations or click the **Search**  button to select specific locations.

 The warranty writer and processor's user IDs have to support the work order location and vendor IDs of the claim that has been sent to processing in order to receive the claim. If the user IDs do not support the location and vendor IDs of the next claim in the queue, one of the following happens, depending on the user:

 For the Warranty Writer, the **Get New Claim** button will be active. However, when you press **Get New Claim**, it will display the message "No claims to assign."

 For the Warranty Processor, the **Get New Claim** button will be disabled and the Location and Vendor dropdowns will be blank.

7. Click **Save** to save your entries.

The new user will be displayed on the Manage Users page.

Portal Wide Settings

Portal-wide Settings	
Suppress System-generated Notes	☐
Date/Time values in 24 hour or 12 hour format	24 Hour ▼
Determine Aging Based on	Work order open date ▼
Use Vendor Chooser instead of Choicelist	☐
Include core claims by default	☐

Suppress system generated notes: Check this box to hide the system generated work order notes on the Claim Detail page, e.g., Employee X viewed Equipment History.

Date/Time values in 24 hour or 12 hour format: This setting determines whether date/time values are displayed in 24 hour or 12 hour format. Click the dropdown to select the desired format.

Determine aging based on: Select either Work Order Open Date or Work Order Closed Date from which to calculate the warranty aging.

Use Vendor Chooser instead of Choicelist: Check this box to use the vendor chooser instead of a choicelist in the warranty portals.

Include core claims by default: Checking this box will show all warranty types (core, equipment, part) on the default filter. Disabling will only show equipment and part claims, unless core claims are specifically filtered for. This option is disabled by default.

Warranty Writer Settings

Warranty Writer Settings	
Claim status	... APPROVED IN PREPARATION ON HOLD Remove Remove all
Display claims as YELLOW when within percent of time limit	90 %
Display claims as RED when within percent of time limit	80 %
Warranty Writer can have more than one claim in IN PREPARATION status at a time	☐

The Writer Settings section displays when the pencil icon on the Warranty Writer Portal is clicked. The Warranty Processor and Warranty Supervisor Settings pages do not contain this section.

 The above screenshot displays recommended status settings for the Warranty Writer.

Claim Status/Assignment Change Workflow

Each Warranty Portal role views claims based on the statuses that are set in this section. While each role has access to all of the claim status options, there are certain statuses that must be set for the portal to operate correctly.

 If the claim status settings are not set properly for each role, some claims will not be viewable in the portal. If a user needs to view and interact with claims in certain statuses, that status must be added to their list.

The following statuses are required for the specified Warranty roles:

Warranty Writer:

- IN PREPARATION
- RETURNED TO WRITER
- ON HOLD

Warranty Processor:

- SENT TO PROCESSING
- IN PROCESSING
- ON HOLD

If your organization would like the writer or processor to monitor RETURN TO SHOP, NON-WARRANTY, or any other statuses, those statuses will need to be added to their respective list. Please refer to the Warranty Status ID Setup section for details on how to modify or add the claim status settings.

Display claims as yellow when within percent of time limit: This setting defaults to 25% and controls when claim rows will have a yellow indicator based on the amount of time remaining to submit the claim. This is based on the current age of the claim and the number of days the manufacturer allows for warranty claim submission.

Display claims as red when within percent of time limit: This setting defaults to 10% and controls when claim rows will have a red indicator based on the amount of time remaining to submit the claim. This is based on the current age of the claim and the number of days the manufacturer allows for warranty claim submission.

Warranty Writer can have more than one claim in IN PREPARATION status at a time: if this checkbox is unchecked, a single warranty writer will be limited to having only one active warranty claim at a time. In order to have more than one claim in IN PREPARATION status, this box must be checked.

Assigning and Editing Claims

Warranty Writers can modify claims with an IN PREPARATION status or any status in their settings list.

Warranty Processors can modify claims with an IN PROCESSING status or any status in their settings list.

Warranty Supervisors can view and edit claims in any status.

Claim Detail Page Settings

Claim Detail Page Settings	
Default History number of months	6
Show work order comments or notes or both?	Both ▼
Show warranty claim comments or notes or both?	Both ▼

Default History number of months - This setting determines the default for the number of months to display when on the Equipment History page.

Portal Reports

Portal Reports		
Claim Detail Report	Equipment Info/Warranty/FA-WarrantyClaimDetail.rpt Parameters: ClaimNum	Restore default
Work Order Detail Report	Shop Operations/FA-WODtl.rpt Parameters: Location, WOYear, WONum	Restore default

Claim Detail Report

Enter the report name in this field to activate the link on the Claim Detail Page as indicated in the screenshot below. Click **Restore Default** to restore the setting to the default claim detail report.

- ✓ If you are customizing this report, please be aware that Web Modules use the following case sensitive parameters: ClaimNum.

Warranty Claim: 2007-0000063		Claim Type: EQUIPMENT		Claim Status: APPROVED		Claim Amount: 470.43		Edit 3C Summary	
Claim ID	2007-0000063	Warranty Vendor	2593-3666		CUMMINS POWER SOUTH LLC				
Claim Type	EQUIPMENT	Vendor Claim Number			Claim Status	APPROVED			
Claim Date	01/02/2007	Manufacturer Time Limit	Days		Assigned User ID				
Days Open/Left		Date Submitted			Claim Priority				
Claim Amounts				Total Claim Amount 470.43					
Total Claim Amount	470.43	Total Labor	470.43	Total Parts	0.00	Total Other	0.00		
Settlement Data				Total Amount 470.43					
Total Settlement Amount	470.43	Total Labor	470.43	Total Parts	0.00	Total Other	0.00		
Settlement Date	01/26/2007	Document Number	6963942	Tax Amount	0.00	Freight Cost	0.00		
Equipment: 2354 : BUS NF-D35-04-2300 35` PASSENGER TRANSIT									
Equipment ID	2354	Description	BUS NF-D35-04-2300 35` PASSENGER TRANSIT						
In Service Date	01/20/2005	Life Cycle Status Code	1: LIFE SAFETY-CRITICAL						
Meter 1	365178	Meter 1 Reading Date	09/07/2011						
Meter 2	0	Meter 2 Reading Date	09/15/2006						
Warranty Repairs									
Tasks									
Delete	Manufacturer Op Codes	Task Code		Hours	Labor Cost	Parts Cost	Other Cost	Claim Amount	
☐		008-100	FRAME - TOW VEHICLE	1	470.43	0	0	470.43	
☐				0	0	0	0	0	

Work Order Detail Report

Enter the report name in this field to activate the Work Order ID hyperlink when the **Equipment History** button is clicked on the Claim Detail Page. Click the **Restore Default** button to restore the setting to the default Work Order Detail Report.

- ✓ If you are customizing this report, please be aware that web modules use the following case sensitive parameters: Location, WOYear, and WONum.

Equipment: 2354 : BUS NF-D35-04-2300 35` PASSENGER TRANSIT			
Equipment ID	2354	Description	BUS NF-D35-04-2300 35` PASSENGER TRANSIT
In Service Date	01/20/2005	Life Cycle Status Code	1: LIFE SAFETY-CRITICAL
Meter 1	365178	Meter 1 Reading Date	09/07/2011
Meter 2	0	Meter 2 Reading Date	09/15/2006

4. Warranty Writer Portal

The Warranty Writer Portal is used by warranty writers to prepare incoming warranty claims for submission to the manufacturers. Its core functions include:

- Assign the next claim to be handled to the writer.
- Edit all repair-related aspects of the claim (status, notes, 3Cs text, manufacturer codes, claim amounts, claim parts, notes, part, but not the vendor claim ID or reference order ID).
- View full detail of the originating work order.
- Return the claim to the maintenance shop for correction.
- Mark repairs and/or full claims as non-warranty.
- Place a claim “on hold” for further review and investigation.
- Finish a claim and move it on to Warranty Processing for submission to the manufacturer.
- Search claim history.

Main Warranty Writer Page

The Main Warranty Writer page will display when clicking the Warranty Writer tab. It is divided into the following sections.

The screenshot displays the Warranty Writer Portal interface. At the top, there is a blue header bar with the text "Warranty Writer Portal" and a small icon. Below the header, there is a section labeled "Actions" containing a "Go to Claim ID" input field, a "Go" button, and a "Get New Claim" button. The main section is titled "Warranty Claims: 1" and contains a table with the following data:

**	Claim ID	Work Order	Vendor	Type	Part ID	Equipment
	2015-0000020	RALOC-4-2014-335	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.	EQUIPMENT		RACAR1

Below the table, there is a "Current Filter" dropdown menu. At the bottom, there is a text area containing the following information: "Claim status: APPROVED, DAMAGED IN SHIPPING, DID NOT FIX PROBLEM, IN PREPARATION, NONWARRANTY, ON HOLD, SETTLED, UNAUTHORIZED REPAIR, Claim designation: WARRANTY, User ID: AC, Closed: NO". To the right of this text area are two buttons: "Define Filter" and "Clear Filter".

Actions

Actions

Go to Claim ID

The **Go to Claim ID** area allows you to quickly look up a claim's detail (pending or historical) based on claim ID.

To look up a claim's detail:

1. Enter the claim ID and click **Go** to view detail.

The Claim Detail Page will display.

2. Click **Get New Claim** to go to the next available pending claim based on priority and which claim needs to be completed the soonest.

 If a claim displays in the Warranty Claims list, and you click the **Claim ID** button, the Claim Detail page opens.

 If you click the **Get New Claim** button, the claim's status changes to **In Preparation** and it is assigned to you. Upon returning to the Main Warranty Writer page, the claim will display in your list of claims.

Warranty Claims

The Warranty Claims area defaults to show all the claims assigned to you. You may change the list by defining a new filter as outlined in the Current Filter section below.

 If your organization does not allow more than one claim to be open at a time, and the writer already has an IN PREPARATION claim in their queue, they will not be able to get a new claim. In this case, it is possible to have multiple claims in the list of different statuses (ON HOLD, RETURNED TO SHOP, etc.), but only one claim would be IN PREPARATION status.

Warranty Claims: 1						
**	Claim ID	Work Order	Vendor	Type	Part ID	Equipment
	2015-0000020	RALOC-4-2014-335	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.	EQUIPMENT		 RACAR1

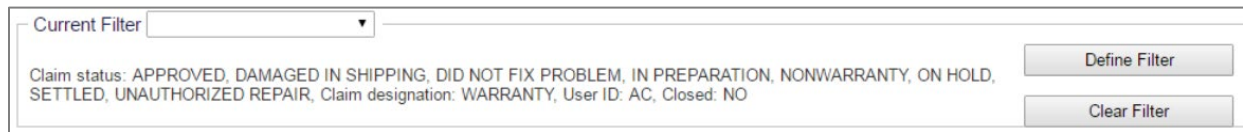
You can sort all columns in the warranty claims list and arrange them to display the last updated information. The red work order, vendor, and equipment ID numbers are clickable links that will take you to that specific information. The Part ID is also a link that will take you to its Enterprise Portal screen. The magnifying glass icon next to the Equipment ID link opens the Asset Viewer pop-in.

- ✔ To change the order of columns, click and hold on the column title and drag it to the location where you would like it displayed.

The colors green, red, and yellow indicate the amount of time left to submit the claim and can be customized in the Warranty Writer settings as described above.

Current Filter

At the bottom of the page, the Current Filter section provides the ability to filter the list of pending claims to a subset of claims. The active filter is displayed in the Current Filter section.



Current Filter

Claim status: APPROVED, DAMAGED IN SHIPPING, DID NOT FIX PROBLEM, IN PREPARATION, NONWARRANTY, ON HOLD, SETTLED, UNAUTHORIZED REPAIR, Claim designation: WARRANTY, User ID: AC, Closed: NO

Define Filter

Clear Filter

To filter the claims in the list:

1. Click in the **Current Filter** drop-down menu to the bottom left of the page.
2. Select the filter you want to use.

This applies the filter to the page.

To define a new filter

1. Click **Define Filter** to filter the list.

The Filters Claims page will be displayed.

2. Complete the fields as desired.
3. Click the **Apply Filter** button to apply the new filter.

The main Warranty Writer page will display the results according to the new filter.

 Click **Reset Filters** to reset the filter to the original default filter. Click **Cancel** to return to the main Warranty Writer page.

4. To save the filter, enter a name in the **Save Filter As** field, and click **Save**.

To clear a filter

 Click **Clear Filter**.

The main Warranty Writer page will return to the default filter.

Claim Detail Page

On the main Warranty Writer page, click **Get New Claim** to search for a Claim ID, or click on the claim ID from your queue to launch the Claim Detail page which consists of the following sections:

Claim Header

The claim header provides claim details including a summary of the labor, parts, and other amounts.

Warranty Claim: 2012-0000080		Claim Type: PART		Claim Status: IN PREPARATION		Claim Amount: 3.41	
Claim ID	2012-0000080	Warranty Vendor	100-5661	SYNAPSE ENERGY ECONOMICS, INC.			
Claim Type	PART	Vendor Claim Number		Claim Status	IN PREPARATION		
Claim Date	10/14/2012	Manufacturer Time Limit	90 Days	Assigned User ID	BS		
Days Open/Left	948/-858	Date Submitted		Claim Priority			

Claim Notes

All notes for the claim are displayed under the Claim Notes section. This section also includes a New Note area where you can add new notes to the claim.

Claim Notes

Warranty Claim Notes

03/22/2016 09:15 AM SRV-SARAH VICKERS
NEW IN PREPARATION CLAIM ASSIGNED.

New Note

Save Note

To add a new note:

1. Click in the New Note text field.
2. Type you Note.
3. Click Save Note.

Part Details

The Part Details section provides details about the parts required for the claim.

Part Details			
Part ID	1000	Part Description	HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON
Part Manufacturer	GARRETT - GARRETT	Manufacturer Part Number	GARRETT1000
Cross Reference	Vendor	Part ID	
	ORION	050808056-0	
	FLXIBLE CORPORA	97-9999-600-0	
	SNAP ON	SNP1000-0	
	ALSTOM	ALSTOM1000-0	
	BILLYTHEKID	BTK1000-0	
	ALSTOM	ALSTOM1000 6", HOSE-0	
	GARRETT	GARRETT1000 6", HOSE-0	
	BOMBARDIER	BOMBARDIER-1000-0	
	GARRETT	GARRETT1000-0	
	WABCO	WABCO1000-0	
		ALSTOM1000-0	

Equipment

The Equipment section provides the equipment ID with a link to additional equipment details.

Equipment: SRV-CAR03 - JEEP GRAND CHEROKEE LIMITED				
Equipment ID	SRV-CAR03	Description	JEEP GRAND CHEROKEE LIMITED	Equipment History
In Service Date		Life Cycle Status Code	A: ACTIVE	
Meter 1	0	Meter 1 Reading Date	03/09/2017	Claim History
Meter 2	0	Meter 2 Reading Date	03/09/2017	
Warranty Repairs				

Equipment History Button

To review the work order history for that particular equipment, click **Equipment History**. The Work Order History screen opens and displays equipment ID, asset number, station location and license number.

Work Order History			
Equipment	SRV-CAR03: 2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED		
Asset number	Station Location	1	License number
Months of History to Display (0 = ALL)	6	Go	Show All Months

Use the **Months of History to Display (0=ALL)** field to set the number of months that you would like to view history. Enter a number in the field and click **Go** to filter the list. Or, click **Show All Months** to view the entire history.

The History for the Last # Months list displays work order ID, location name, WO date, task ID, complaint, cause, and correction information for each work order.



Clicking the **Work Order ID** hyperlink takes you to the Work Order Detail Report.

History for the Last 6 Months						
Work Order ID	Location Name	WO Date	Task	Complaint	Cause	Correction
RA L-1-B 1-2015-393	RICHARD'S TEST LOC W/SPACES	04/28/2015 00:00	GNMTASK14 - GNM TASK14			
RA L-1-B 1-2015-223	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800			
RA L-1-B 1-2015-222	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800	QA-SYMP-CRACK	QA-CRACK	FIX SHUTOFF
RA L-1-B 1-2015-222	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800			
RA L-1-B 1-2015-219	RICHARD'S TEST LOC W/SPACES	04/21/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800	KGSYMP	R-10	ADJUSTED
RA L-1-B 1-2015-36	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			
RA L-1-B 1-2015-35	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			
RA L-1-B 1-2015-34	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			

Claim History Button

To review the claim history for that particular equipment, click **Claim History**. The Warranty Claim History screen opens and displays Asset ID, Asset Number, and License Number.

Warranty Claim History			
Asset ID	SRV-CAR03 : 2017 JEEP GRAND CHEROKEE JEEP GRAND CHEROKEE LIMITED		
Asset Number	Station Location	1	
License Number	Repair Location	1	
Actions Months of History to Display 6 Go Show All Months			
Claim History for: SRV-CAR03			
Claim ID	Claim Type	Vendor ID	Claim Status
2017-0000045	EQUIPMENT	TH-VENDOR-00001	IN PROCESSING
		Settlement Amount	0
		Last Update 05/17/2017 14:23	

Use the **Months of History to Display (0=ALL)** field to set the number of months that you would like to view history. Enter a number in the field and click **Go** to filter the list. Or, click **Show All Months** to view the entire history.

The History for the Last # Months list displays the Claim ID, Claim Type, Vendor ID, Claim Status, Settlement Amount, and Last Update for each claim.

Warranty Repairs

This section details the tasks and associated parts for the require warranty repairs.

Service Requests			
Delete	View	Service Request ID	Description
☐	View Details	312-913	R-TRUCKS-4 - COLLECTOR PADDLE MISSING/WORN
☐	View Details	312-977	R-TRUCKS-6 - COLLECTOR SHUNT STRAP BROKEN
☐	View Details	312-978	R-TRUCKS-9
☐	View Details	312-979	R-TRUCKS-9
☐	View Details	312-980	R-TRUCKS-9
☐	View Details	312-981	R-TRUCKS-9
☐	View Details	312-982	R-TRUCKS-9
☐	View Details	312-983	R-TRUCKS-6 - COLLECTOR SHUNT STRAP BROKEN
☐	View Details	312-984	R-TRUCKS-9
Tasks			

Warranty Repairs								
Tasks								
Delete	Manufacturer Op Codes	Task Code	Hours	Labor Cost	Parts Cost	Other Cost	Claim Amount	
☐		000-901 NEW VEHICLE IN SERVICE INSP	0	0	3.41	0	3.41	
☐			0	0	0	0	0	

Parts							
Delete	Task	Part ID	Part Description	Cross Reference	Qty	Unit Price	
☐	000-901	1000	HOSE-SILICON(RU; HOSE, SILICON, ID 2-1/2 INC	GARRETT1000 GARRETT Cross References: 050808056-0 ...	1	3.41	
☐					0		

Work Order

The Work Order section details the work order associated with this warranty as well as the tasks and parts required for the work order.

Work Order: RALOC2-2012-39			
Work Order ID	RALOC2-2012-39	Work Order Status	CLOSED
Opened Date	12/14/2012 09:55	Opened By	RICHARD'S USER
Finished Date	10/14/2012 14:20	Finished By	RICHARD'S USER
Closed Date	12/14/2012 10:07	Closed By	RICHARD'S USER
Work Order Meter 1	250	Work Order Meter 2	0
Tasks			
Is warranty	On SR	Task Code	
		000-901 : NEW VEHICLE IN SERVICE INSPECTION	
		BO1-MA-1220 : CAR BODY GRAFFITI	
		KG1TASK1 : KG1TASK1	

Parts								
Task ID	Part ID	Description	Cross Reference	Qty	Issued Price	Total Cost	Vendor Invoice	Invoice Date
000-901	1000-0	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 GARRETT1000 GARRETT Cross References: 050806056-0 ...	1	\$3.41	\$3.41		
000-901	1000-3	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 GARRETT1000 6", HOSE GARRETT Cross References: GARRETT1000 6", HOSE-0	1	\$3.22	\$3.22		
000-901	1000A-0	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 Cross References: ALSTOM1000A-0 ...	1	\$5.25	\$5.25		
000-901	RA1000-0	ABS SENSOR; TEST PART	 Cross References: TEST-001-0 ...	1	\$5.35	\$5.35		
000-901	RA1001-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1000-0 Cross References: LUMINATOR-RA1000-0 ...	1	\$5.36	\$5.36		
000-901	RA1002-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1002-0 LUMINATOR Cross References: LUMINATOR-RA1000-0 ...	1	\$5.37	\$5.37		
000-901	RA1003-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1003-0 LUMINATOR Cross References: LUMINATOR-RA1000-0 ...	1	\$5.38	\$5.38		

Claim Detail Report Link

The Claim Detail Report Link is a shortcut to run the Warranty Claim report of the claim you are looking at. For more information on the Warranty Claim Report, refer to the Directory of Standard Reports.

Edit Claim Repair Details

Edit 3C Data

- To edit 3C data (complaint, cause, correction) or add parts to the claim, on the Claim Detail page on the right side of the header banner, click **Edit 3C Summary**.

Claim Status: IN PREPARATION		Claim Amount: 1.43		Edit 3C Summary
2065665-APPLETON	Claim Designation	WARRANTY ▼		
	Claim Status	IN PREPARATION ...		
	Assigned User ID	SRV ...		
	Claim Priority	...		
Total Claim Amount 1.43				
ts 0.00	Total Other		0.00	

The Warranty C/C/C Information pop-up displays.

Warranty C/C/C Information

Complaint

Cause

Correction

Causal Parts Details

Part ID

- 0

Lookup

Save

Close

- In the service request C/C/C Info area, enter any necessary additional information for the complaint, cause, or correction.

 You do not have access to alter the original statements entered by the technician.

- When you are done, click **Save** to save the changes, or **Close** to discard the changes and close this screen.

Edit Task or Part Information

You can change task or part information for Warranty Repairs directly from the Claim Detail page.

1. Edit manufacturer op codes, task code, hours, labor cost, parts cost, and other costs by making changes directly in the field of the Tasks section.

Tasks							
Delete	Manufacturer Op Codes	Task Code	Hours	Labor Cost	Parts Cost	Other Cost	Claim Amount
		01-02 TASK 01-02	5.00	0.00	0.00	0.00	0.00
		01-01 TASK 01-01	1.00	0.00	0.00	0.00	0.00
			0	0	0	0	0



The blank row cannot be deleted. It is available for additional data entry.

2. Edit the task, part ID, part description, quantity, and unit price by making changes directly in the field of the PARTS section.

Parts						
Delete	Task	Part ID	Part Description	Cross Reference	Qty	Unit Price
		0 Lookup			0	

3. To delete line items in both TASKS and PARTS, click the X at the left end of the line. This has no effect on the originating work order. When the change is saved, the line will be deleted.

Delete	Task	Part ID	Part Description	Cross Reference	Qty
		0 Lookup			

4. On the bottom right side of the screen, click **Save** to save any changes.

Move Claim to Next Status or Change Assignment

The **Change Assignment** dropdown menu on the bottom of the Claim Detail page allows you to change the assignment of the warranty with the following options: RETURN TO SHOP or SEND TO PROCESSOR.

1. Click the **Change Assignment** drop down menu.
2. Choose one of the following options:
 - Select **SEND TO PROCESSOR** from the Change Assignment drop-down menu to forward the claim to the next step.
 - a. Click **Save**. The claim becomes un-editable and will be removed from your queue on the main Warranty Writer page.
 - Select **RETURN TO SHOP** to send the claim back to the shop.

- a. Click **Save**. The Warranty Claim page will display.
- b. Click in the **Add Note** section to add comments to explain the reason for returning the claim.
- c. Click **Save**.

The system will not allow you to return the claim to the shop without a note.

- d. The Claim Status now display as RETURNED TO SHOP.

Warranty Claim: 2012-0000080		Claim Type: PART		Claim Status: IN PREPARATION	
Claim ID		Warranty Vendor	100-5661: SYNAPSE ENERGY ECONOMICS, INC.		
Claim Type	PART	Vendor Claim Number	Claim Status		
Claim Date	10/14/2012	Manufacturer Time Limit	90 Days	Assigned User ID	RETURNED TO SHOP
Days Left	-858 Days	Date Submitted		Claim Priority	BS

Work Order: RALOC2-2012-43			
Work Order ID	RALOC2-2012-43	Work order status	CLOSED
Opened Date	12/14/2012	Opened By	RICHARD'S USER
Finished Date	10/14/2012	Finished By	RICHARD'S USER
Closed Date	10/02/2014	Closed By	RICHARD'S USER
Work Order Meter 1	250	Work Order Meter 2	0

Add Note

All notes display on the main Claim Detail page.

5. Warranty Processor Portal

The Warranty Processor Portal is used by warranty processing clerks to track what claims need to be submitted to manufacturers, and to mark claims as having been submitted. Its core functions include:

- Assign the next claim to be processed to the processing clerk.
- View all aspects of the claim (status, notes, 3Cs text, manufacturer codes, claim amounts, claim parts, note causal part).
- Post notes to the claim.
- View notes and comments from the originating work order.
- View vehicle work order history.
- Return claim to warranty writer for correction.
- Print details of the claim to hard copy.
- Place a claim on hold for further investigation.
- Mark a claim as COMPLETE once successfully submitted to the manufacturer.
- Search claim history.

Main Warranty Processor Page

Click the Warranty Processor tab to open the Main Warranty Processor page. It is divided into the following sections.

The screenshot shows the 'Warranty Processor Portal' interface. At the top, there's a header bar. Below it, an 'Actions' section contains a 'Go to Claim ID' input field, a 'Go' button, 'Location' and 'Vendor' dropdown menus, and a 'Get New Claim' button. The main section is titled 'Warranty Claims: 1' and contains a table with the following data:

**	Claim ID	Work Order	Vendor	Type	Part ID	Equipment
	2015-0000020	RALOC-4-2014-335	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.	EQUIPMENT		RACAR1

Below the table is a 'Current Filter' dropdown menu. At the bottom, there's a text area showing claim status and designation, and two buttons: 'Define Filter' and 'Clear Filter'.

 **Note:** If the Warranty Processor's User ID does not support the Location and Vendor IDs of the next claim in the queue, and if there are no claims in queue, the Main Warranty Processor page looks like the page below. The Location and Vendor dropdowns are not populated and the **Get New Claim** button is disabled.

Actions

1. The **Go to Claim ID** field allows for quick lookup of a claim's (pending or historical) detail based on claim ID.
2. Enter the claim ID and click **Go** to view the detail.

The Claim Detail Page will display.

3. Click **Get New Claim** and the next available pending claim will be assigned to you.

 **Note:** Be sure the location and vendor you select match the claim's (in the queue) corresponding values. If the location and vendor pair does not match a claim in the queue, a message indicates "No claims to assign."

Warranty Claims

The Warranty Claims area lists the claims that are assigned to you (regardless of status).

Warranty Claims: 1						
**	Claim ID	Work Order	Vendor	Type	Part ID	Equipment
	2015-0000020	RALOC-4-2014-335	100-5661 - SYNAPSE ENERGY ECONOMICS, INC.	EQUIPMENT		 RACAR1

You can sort and arrange all columns in the Warranty Claims list to display last updated information. The red work order, vendor, and equipment ID numbers are clickable links that will take you to that specific information. The Part ID is also a link that will take you to its Enterprise Portal screen. The magnifying glass icon next to the Equipment ID link opens the Asset Viewer pop-in.

- ✓ To change the order of columns, click and hold on the column title and drag it to the location where you would like it displayed.

The colors green, red, and yellow indicate the amount of time left to submit the claim and can be customized in the Warranty Writer settings as described above

The information displayed includes the Claim ID, Work Order ID, Vendor, Type, Status, Age in Days, Days Left, Work Order Opened date, Amount, Priority and Last Update.

 Clicking the **Claim ID** button takes you to the Claim Detail page.

Current Filter

The Current Filter section provides the ability to filter the list of pending claims to a subset of claims. The active filter is displayed in the Current Filter section.

To filter the claims in the list:

1. Click in the **Current Filter** drop-down menu to the bottom left of the page.
2. Select the filter you want to use.

This applies the filter to the page.

To define a new filter:

1. Click **Define Filter**.

The Filters Claims page displays.

2. Complete the fields as desired and click **Apply Filter**.

The main Warranty Writer page displays the results according to the new filter.



Click **Reset Filters** to reset the filter to the default filter. Click **Cancel** to return to the main Warranty Writer page.

- To save the filter, enter a name in the **Save Filter As** field, and click **Save**.

To clear a filter:



Click **Clear Filter**.

The main Warranty Writer page will return to the default filter.

Claim Detail Page

Click **Get New Claim**, search for a Claim ID, or click on the Claim ID from your queue to launch the Claim Detail page which consists of the following sections:

Claim Header

The claim header provides claim details including a summary of the labor, parts and other amounts.

Warranty Claim: 2012-0000080		Claim Type: PART		Claim Status: IN PREPARATION		Claim Amount: 3.41	
Claim ID	2012-0000080	Warranty Vendor	100-5661	SYNAPSE ENERGY ECONOMICS, INC.			
Claim Type	PART	Vendor Claim Number		Claim Status	IN PREPARATION		
Claim Date	10/14/2012	Manufacturer Time Limit	90 Days	Assigned User ID	BS		
Days Open/Left	948/-858	Date Submitted		Claim Priority			

Claim Notes

All notes for the claim are displayed under the Claim Notes section. This section also includes a New Note area where you can add new notes to the claim.

Claim Notes

Warranty Claim Notes

03/22/2016 09:15 AM

SRV-SARAH VICKERS

NEW IN PREPARATION CLAIM ASSIGNED.

New Note

Save Note

To add a new note:

- Click in the New Note text field.

2. Type your Note.
3. Click Save Note.

Part Details

The Part Details section provides details about the parts required for the claim.

Part Details			
Part ID	1000	Part Description	HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON
Part Manufacturer	GARRETT - GARRETT	Manufacturer Part Number	GARRETT1000
Cross Reference	Vendor	Part ID	
	ORION	050808056-0	
	FLXIBLE CORPORA	97-9999-600-0	
	SNAP ON	SNP1000-0	
	ALSTOM	ALSTOM1000-0	
	BILLYTHEKID	BTK1000-0	
	ALSTOM	ALSTOM1000 6", HOSE-0	
	GARRETT	GARRETT1000 6", HOSE-0	
	BOMBARDIER	BOMBARDIER-1000-0	
	GARRETT	GARRETT1000-0	
	WABCO	WABCO1000-0	
		ALSTOM1000-0	

Equipment

The Equipment section provides the equipment ID with a link to additional equipment details.

Equipment: RACAR1 : MOTOR POOL SEDAN LINEAR - TEST				
Equipment ID	RACAR1	Description	MOTOR POOL SEDAN LINEAR - TEST	Equipment History
In Service Date		Life Cycle Status Code	3: OPERATION SUPPORT	
Meter 1	2	Meter 1 Reading Date	05/18/2015	
Meter 2	0	Meter 2 Reading Date	02/16/2012	

Equipment History Button

To review the work order history for that particular equipment, press **Equipment History**. The Work Order History screen opens to display the equipment ID, asset number, station location, and license number.

Work Order History				
Equipment	RACAR1: RASNCAR1 2012 HONDA&US CIVIC&US GRAY MOTOR POOL SEDAN LINEAR - TEST			
Asset number	123	Station Location	RALOC-1	License number
> Months of History to Display (0 = ALL)		6	Go	Show All Months

1. Set the number of months of history you want to view with the **Months of History to Display (0=ALL)** field.
2. Do one of the following to change what history you see:

- Enter a number in the field and click **Go** to filter the list.
- Click **Show All Months** to view the entire history.

The History for the Last # Months List displays the work order ID, location name, WO date, task ID, complaint, cause, and correction information for each work order.

 Clicking the **Work Order ID** hyperlink takes you to the Work Order Detail Report.

History for the Last 6 Months						
Work Order ID	Location Name	WO Date	Task	Complaint	Cause	Correction
RA L-1-B 1-2015-393	RICHARD'S TEST LOC W/SPACES	04/28/2015 00:00	GNMTASK14 - GNM TASK14			
RA L-1-B 1-2015-223	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800			
RA L-1-B 1-2015-222	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800	QA-SYMP-CRACK	QA-CRACK	FIX SHUTOFF
RA L-1-B 1-2015-222	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800			
RA L-1-B 1-2015-219	RICHARD'S TEST LOC W/SPACES	04/21/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800	KGSYMP	R-10	ADJUSTED
RA L-1-B 1-2015-36	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			
RA L-1-B 1-2015-35	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			

Warranty Repairs

This section details the tasks and associated parts for the required warranty repairs.

Service Requests			
Delete	View	Service Request ID	Description
☐	View Details	312-913	R-TRUCKS-4 - COLLECTOR PADDLE MISSING/WORN
☐	View Details	312-977	R-TRUCKS-6 - COLLECTOR SHUNT STRAP BROKEN
☐	View Details	312-978	R-TRUCKS-9
☐	View Details	312-979	R-TRUCKS-9
☐	View Details	312-980	R-TRUCKS-9
☐	View Details	312-981	R-TRUCKS-9
☐	View Details	312-982	R-TRUCKS-9
☐	View Details	312-983	R-TRUCKS-6 - COLLECTOR SHUNT STRAP BROKEN
☐	View Details	312-984	R-TRUCKS-9
Tasks			

Warranty Repairs								
Tasks								
Delete	Manufacturer Op Codes	Task Code	Hours	Labor Cost	Parts Cost	Other Cost	Claim Amount	
☐		000-901 NEW VEHICLE IN SERVICE INSP	0	0	3.41	0	3.41	
☐			0	0	0	0	0	

Parts							
Delete	Task	Part ID	Part Description	Cross Reference	Qty	Unit Price	
☐	000-901	1000	HOSE-SILICON(RU; HOSE, SILICON, ID 2-1/2 INC	GARRETT1000 GARRETT Cross References: 050808056-0 ...	1	3.41	
☐					0		

Work Order

The Work Order section details the work order associated with this warranty as well as the tasks and parts required for the work order.

Work Order: RALOC2-2012-39

Work Order ID	RALOC2-2012-39	Work Order Status	CLOSED
Opened Date	12/14/2012 09:55	Opened By	RICHARD'S USER
Finished Date	10/14/2012 14:20	Finished By	RICHARD'S USER
Closed Date	12/14/2012 10:07	Closed By	RICHARD'S USER
Work Order Meter 1	250	Work Order Meter 2	0

Tasks

Is warranty	On SR	Task Code
		000-901 : NEW VEHICLE IN SERVICE INSPECTION
		BO1-MA-1220 : CAR BODY GRAFFITI
		KG1TASK1 : KG1TASK1

Parts

Task ID	Part ID	Description	Cross Reference	Qty	Issued Price	Total Cost	Vendor Invoice	Invoice Date
000-901	1000-0	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 GARRETT1000 GARRETT Cross References: 050808050-0 ...	1	\$3.41	\$3.41		
000-901	1000-3	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 GARRETT1000 6", HOSE GARRETT Cross References: GARRETT1000 6", HOSE-0	1	\$3.22	\$3.22		
000-901	1000A-0	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 Cross References: ALSTOM1000A-0 ...	1	\$5.25	\$5.25		
000-901	RA1000-0	ABS SENSOR; TEST PART	 Cross References: TEST-001-0 ...	1	\$5.35	\$5.35		
000-901	RA1001-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1000-0 Cross References: LUMINATOR-RA1000-0-0 ...	1	\$5.36	\$5.36		
000-901	RA1002-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1002-0 LUMINATOR Cross References: LUMINATOR-RA1000-0-0 ...	1	\$5.37	\$5.37		
000-901	RA1003-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1003-0 LUMINATOR Cross References: LUMINATOR-RA1000-0-0 ...	1	\$5.38	\$5.38		

Claim Detail Report Link

The Claim Detail Report Link is a shortcut to run the Warranty Claim report of the claim you are looking at. For more information on the Warranty Claim Report, refer to the Directory of Standard Reports.

Move Claim to Next Status or Change Assignment

A dropdown menu on the bottom of the Claim Detail page provides the capability to change the assignment of the warranty with the following options: RETURN TO WRITER or SEND TO VENDOR.

1. Click the **Change Assignment** drop-down menu.
2. Select the desired action from the drop-down menu to forward the claim to the next step.
3. Click **SAVE**.

The claim becomes un-editable and is removed from your queue on the main Warranty Writer page.

4. Add comments to the Add Note section to explain the reason for the selected action
Click **SAVE**.

The system will not allow you to return the claim to the shop without a note.

Warranty Claim: 2012-0000080		Claim Type: PART		Claim Status: IN PREPARATION	
Claim ID		Warranty Vendor	100-5661: SYNAPSE ENERGY ECONOMICS, INC.		
Claim Type	PART	Vendor Claim Number		Claim Status	RETURNED TO SHOP
Claim Date	10/14/2012	Manufacturer Time Limit	90 Days	Assigned User ID	BS
Days Left	-858 Days	Date Submitted		Claim Priority	

Work Order: RALOC2-2012-43			
Work Order ID	RALOC2-2012-43	Work order status	CLOSED
Opened Date	12/14/2012	Opened By	RICHARD'S USER
Finished Date	10/14/2012	Finished By	RICHARD'S USER
Closed Date	10/02/2014	Closed By	RICHARD'S USER
Work Order Meter 1	250	Work Order Meter 2	0

Add Note

The claim status now displays as the selected action. Notes also display on the main Claim Detail page.

6. Warranty Supervisor Portal

The Warranty Supervisor Portal provides warranty supervisors with an overview and summary of the queue of in-progress warranty claims, grouped by warranty portal users, equipment manufacturer, claim status, and days remaining to submit to the manufacturer. Its core functions include:

- Look up a claim (pending or historical) based on Claim ID.
- Search/filter pending claims based on a combination of partial claim ID, VIN, date range, manufacturer, unit #, and status.
- View the queue of pending or in progress warranty claims.
- Assign and unassign claims to and from warranty portal users.
- Update priority of claims in queue for processing.
- View full detail and history of warranty claims.

Main Warranty Supervisor Page

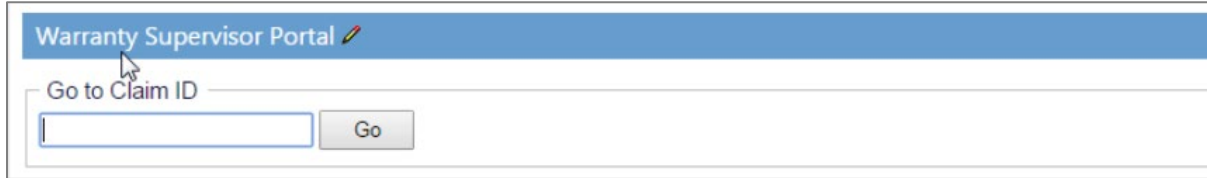
The Main Warranty Processor page displays when clicking the Warranty Supervisor tab. This page allows the supervisor to manage claims, jump to a particular claim, and view the workload summary by user, manufacturer, status and days. It is divided into the following sections.

The screenshot shows the 'Warranty Supervisor Portal' interface. At the top, there is a search bar labeled 'Go to Claim ID' with a 'Go' button. Below this is a section titled 'Current Workload Summary by User'. Underneath, there is a 'Summary By' section with five buttons: 'User', 'Manufacturer', 'Vendor', 'Status', and 'Days'. The 'User' button is selected. Below this is a table with the following columns: 'User', 'Processor', 'Writer', and 'Claims'. The table contains several rows of data, including users like 'AA - RAY MORO', 'AC - ANTHONY CARTWRIGHT', 'AF - AF', 'BS - BEN SWANSON', and 'CANG - CANG NGUYEN', along with their processor and writer status and the number of claims. At the bottom of the interface is a 'Manage Claims' button.

User	Processor	Writer	Claims
AA - RAY MORO	Y	Y	1
IN PREPARATION			1
AC - ANTHONY CARTWRIGHT	Y	Y	1
IN PREPARATION			1
AF - AF	Y	Y	0
BS - BEN SWANSON	Y	Y	3
IN PREPARATION			3
CANG - CANG NGUYEN	Y	Y	7
APPROVED			2
IN PREPARATION			2

Go to Claim ID

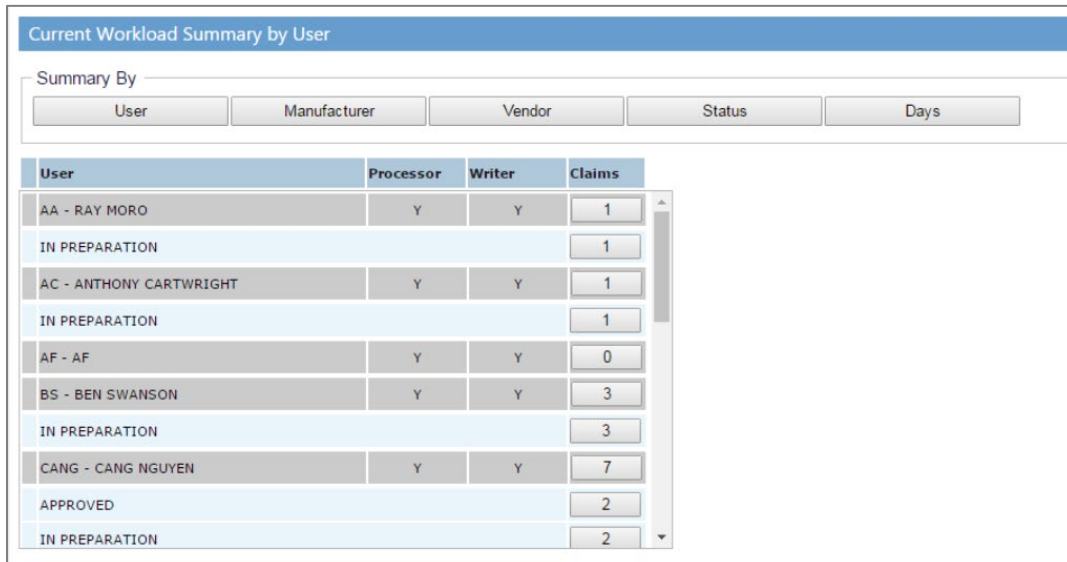
The Go to Claim ID area allows supervisors to enter a claim ID and go directly to the Claim Details page for that claim.



Summary by and Current Workload Summary

The **Summary By** area controls the list shown in the Current Workload Summary area.

The default for the Current Workload Summary is by User, but the list can be changed by clicking the correct button from the Summary by list.



User	Processor	Writer	Claims
AA - RAY MORO	Y	Y	1
IN PREPARATION			1
AC - ANTHONY CARTWRIGHT	Y	Y	1
IN PREPARATION			1
AF - AF	Y	Y	0
BS - BEN SWANSON	Y	Y	3
IN PREPARATION			3
CANG - CANG NGUYEN	Y	Y	7
APPROVED			2
IN PREPARATION			2

- Summary by User: Displays User, Processor, Writer, and number of Claims.
- Summary by Manufacturer: Displays Manufacturer, Days Limit, and number of Claims.
- Summary by Vendor: Displays Vendor and number of Claims.
- Summary by Status: Displays Warranty Status and number of Claims.
- Summary by Days: Displays Warranty Status by number of days remaining and number of Claims.

Warranty Claims

Click **Manage Claims** on the Warranty Supervisor Main page to launch the Claim Management page. This page provides supervisors with a list of all open warranty claims including the vendor, status, age (days), days left, amount, priority, assigned user, work order ID, WO opened, and last updated information.

Claim Management													
**	Claim ID	Type	Designation	Part ID	Vendor	Status	Equipment ID	VIN	Manufacturer	Age in Days	Days Left	Amount	Priority
	2008-0004025	EQUIPMENT	WARRANTY		302-1011 - ALSTON	PART WARRANTY	277	277	HITACHI	3019	-519	\$ 537.94	
	2008-0004456	EQUIPMENT	WARRANTY		302-1011 - ALSTON	PART WARRANTY	203	203	HITACHI	3016	-516	\$ 953.55	
	2008-0004463	EQUIPMENT	WARRANTY		302-1011 - ALSTON	PART WARRANTY	204	204	HITACHI	3017	-517	\$ 5,776.56	
	2008-0004489	EQUIPMENT	WARRANTY		2992-3665 - NATIONAL BUS SALES & LEASING	IN PREPARATION	3822	10B64V1988F406707	CHEVY/GOSHEM	3022		\$ 0.00	1

You can sort all columns in the claims list by clicking on the column heading. The red work order, vendor, and equipment ID numbers are clickable links that will take you to that specific information. The Part ID is also a link that will take you to its Enterprise Portal screen. The magnifying glass icon next to the Equipment ID link opens the Asset Viewer pop-in.

✓ To change the order of columns, click and hold on the column title and drag it to the location where you would like it displayed.

- The colors green, red, and yellow indicate the amount of time left to submit the claim and can be customized in the Warranty settings as described above
- Click the appropriate **Claim ID** to go to the Claim Detail page.

Supervisors may set claim priority and assign claims to processors and writers from this page.

Filter Claim List

It is recommended that you filter this list to return the results that meet your requirements.

Current Filter

The Current Filter section provides the ability to filter the list of pending claims to a subset of claims. The active filter is displayed in the Current Filter section.

Current Filter

Closed: NO, Claim status: APPROVED, CAMPAIGN, DAMAGED IN SHIP
WARRANTY, NONWARRANTY, NOT WARRANTABLE, ON HOLD, OUTS
SENTTOVENDOR, TESTING, TO DO CLAIMS, UNAUTHORIZED REPAI

PROBLEM FOUND, NON
SENTTOPROCESSING,

Define Filter

Clear Filter

To filter the claims in the list:

1. Click in the **Current Filter** drop-down menu to the bottom left of the page.
2. Select the filter you want to use.

This applies the filter to the page.

To define a new filter:

1. Click **Define Filter**.

The Filters Claims page displays.

2. Complete the fields as desired.
3. Click **Apply Filter**.

The main Claim Management page displays the results according to the new filter.

 Click **Reset Filters** to reset the filter to the original default filter. Click **Cancel** to return to the Claim Management page.

4. To save the filter, enter a name in the **Save Filter As** field, and click **Save**.

To clear a filter:

-  Click **Clear Filter**.

The Claim Management page returns to the default filter.

Set Claim Priority

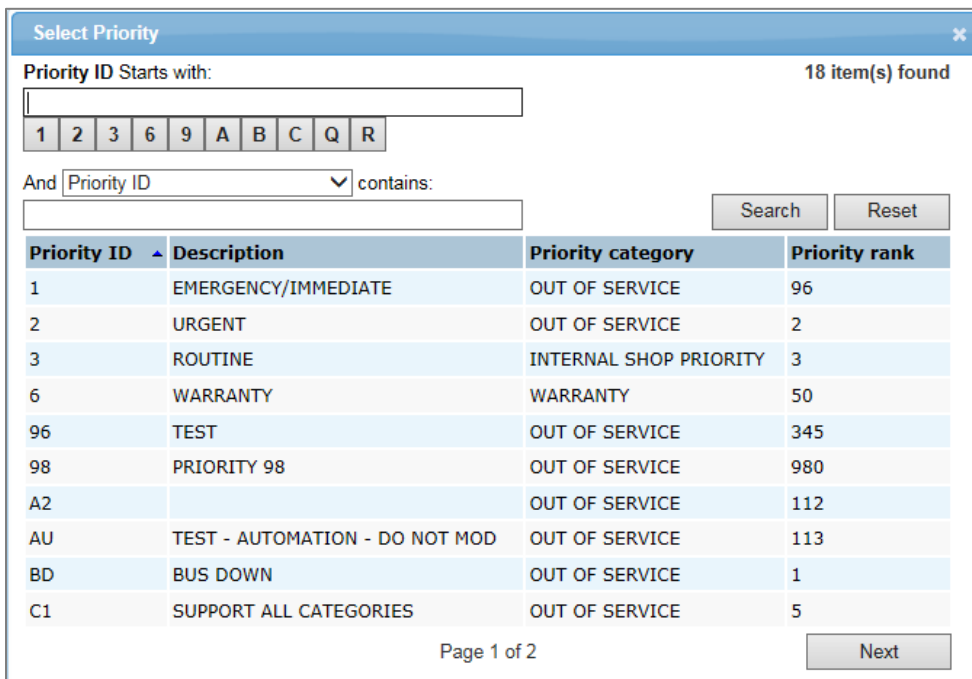
After selecting a claim to open the Claim Detail page, you can set a claim's priority.

To set a claim's priority:

1. Enter the desired priority into the Priority field.



2. Click the  button next to the field in the Priority column to determine the correct priority and code.



Select Priority ✕

Priority ID Starts with: 18 item(s) found

1 2 3 6 9 A B C Q R

And Priority ID contains: Search Reset

Priority ID	Description	Priority category	Priority rank
1	EMERGENCY/IMMEDIATE	OUT OF SERVICE	96
2	URGENT	OUT OF SERVICE	2
3	ROUTINE	INTERNAL SHOP PRIORITY	3
6	WARRANTY	WARRANTY	50
96	TEST	OUT OF SERVICE	345
98	PRIORITY 98	OUT OF SERVICE	980
A2		OUT OF SERVICE	112
AU	TEST - AUTOMATION - DO NOT MOD	OUT OF SERVICE	113
BD	BUS DOWN	OUT OF SERVICE	1
C1	SUPPORT ALL CATEGORIES	OUT OF SERVICE	5

Page 1 of 2 Next

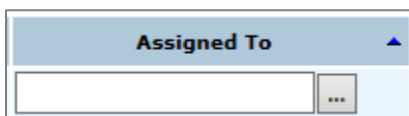
3. Once you have entered a value or selected from the Select Priority screen, click **Save** to apply the priority.

Users can change as many rows as desired and click save. The system then shows the progress on the save and returns either a successful update or the first error encountered.

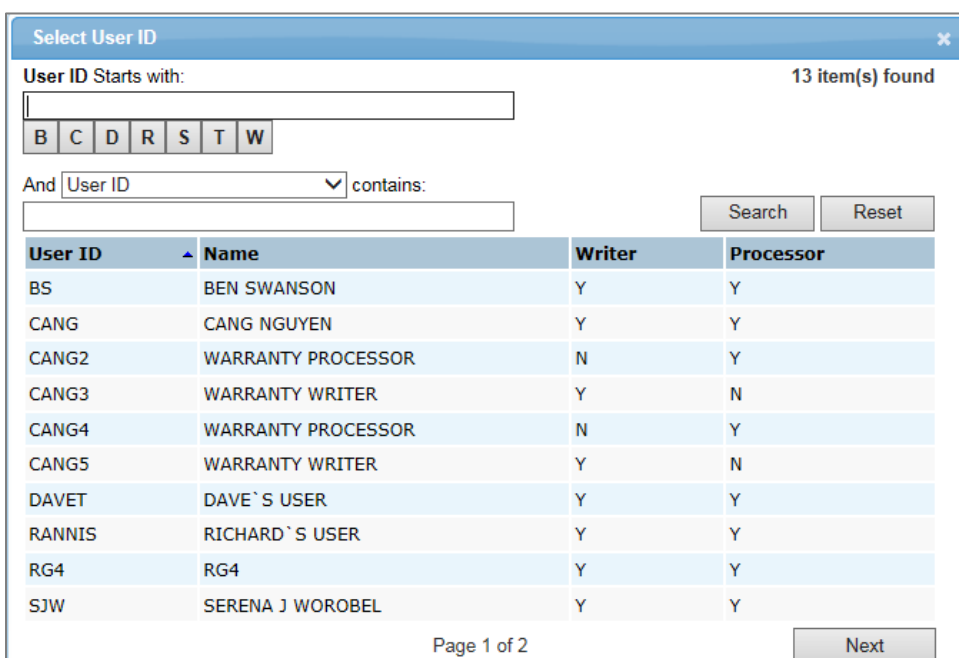
Assign Claim

In the Claim Management area, you can assign the claim to a user.

1. To assign a claim to a user, enter a User ID in the **Assigned To** field. You may have to scroll to the right to see this field.



2. Click the  button next to the field in the **Assigned To** column to select the user from a list.



Select User ID [Close]

User ID Starts with: 13 item(s) found

B C D R S T W

And User ID contains: [Search] [Reset]

User ID	Name	Writer	Processor
BS	BEN SWANSON	Y	Y
CANG	CANG NGUYEN	Y	Y
CANG2	WARRANTY PROCESSOR	N	Y
CANG3	WARRANTY WRITER	Y	N
CANG4	WARRANTY PROCESSOR	N	Y
CANG5	WARRANTY WRITER	Y	N
DAVET	DAVE`S USER	Y	Y
RANNIS	RICHARD`S USER	Y	Y
RG4	RG4	Y	Y
SJW	SERENA J WOROBEL	Y	Y

Page 1 of 2 [Next]

- i. Search for the user in the Select User ID screen by typing in the first few letters and clicking **Search**, or clicking through the pages with the **Next** button.

Click the user you want to use.

3. Once you have entered a value or selected from the Select User ID screen, click **Save** to apply the assignment.

Claim Detail Page

Click **Get New Claim**, search for a Claim ID, or click on the Claim ID from your queue to launch the Claim Detail page, which consists of the following sections:

Claim Header

The claim header provides claim details including a summary of the labor, parts and other amounts.

Warranty Claim: 2012-0000080		Claim Type: PART		Claim Status: IN PREPARATION		Claim Amount: 3.41	
Claim ID	2012-0000080	Warranty Vendor	100-5661		SYNAPSE ENERGY ECONOMICS, INC.		
Claim Type	PART	Vendor Claim Number			Claim Status	IN PREPARATION	...
Claim Date	10/14/2012	Manufacturer Time Limit	90 Days	Assigned User ID	BS	...	
Days Open/Left	948/-858	Date Submitted			Claim Priority	...	

Claim Notes

All notes for the claim are displayed under the Claim Notes section. This section also includes a New Note area where you can add new notes to the claim.

Claim Notes

Warranty Claim Notes

03/22/2016 09:15 AM

SRV-SARAH VICKERS

NEW IN PREPARATION CLAIM ASSIGNED.

New Note

Save Note

To add a new note:

1. Click in the New Note text field.
2. Type your note.
3. Click **Save Note**.

Part Details

The Part Details section provides details about the parts required for the claim.

Part Details			
Part ID	1000	Part Description	HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON
Part Manufacturer	GARRETT - GARRETT	Manufacturer Part Number	GARRETT1000
Cross Reference	Vendor	Part ID	
	ORION	050808056-0	
	FLXIBLE CORPORA	97-9999-600-0	
	SNAP ON	SNP1000-0	
	ALSTOM	ALSTOM1000-0	
	BILLYTHEKID	BTK1000-0	
	ALSTOM	ALSTOM1000 6", HOSE-0	
	GARRETT	GARRETT1000 6", HOSE-0	
	BOMBARDIER	BOMBARDIER-1000-0	
	GARRETT	GARRETT1000-0	
	WABCO	WABCO1000-0	
		ALSTOM1000-0	

Equipment

The Equipment section provides the equipment ID with a link to additional equipment details.

Equipment: 217 : 750 VDC STAINLESS STEEL HEAVY RAIL TRANS				
Equipment ID	217	Description	750 VDC STAINLESS STEEL HEAVY RAIL TRANS	Equipment History
In Service Date	05/01/1985	Life Cycle Status Code	1: LIFE SAFETY-CRITICAL	
Meter 1	650955	Meter 1 Reading Date	09/07/2011	Claim History
Meter 2	0	Meter 2 Reading Date	09/18/2006	

Equipment History Button

- To review the work order history for that particular equipment, click **Equipment History**.

The Work Order History screen launches and displays the equipment ID, asset number, station location, and license number.

Work Order History			
Equipment	RACAR1: RASNCAR1 2012 HONDA&US CIVIC&US GRAY MOTOR POOL SEDAN LINEAR - TEST		
Asset number	123	Station Location	RALOC-1
		License number	
> Months of History to Display (0 = ALL)		6	Go
		Show All Months	

- Choose what history information to view with one of the following options:
 - Enter the number of months of history you want to view with the **Months of History to Display (0=ALL)** field. Click **Go** to filter the list.
 - Click **Show All Months** to view the entire history.

The History for the Last # Months List displays work order ID, location name, WO date, task ID, complaint, cause and correction information for each work order.

 Clicking the **Work Order ID** hyperlink takes you to the Work Order Detail Report.

History for the Last 6 Months						
Work Order ID	Location Name	WO Date	Task	Complaint	Cause	Correction
RA L-1-B 1-2015-393	RICHARD'S TEST LOC W/SPACES	04/28/2015 00:00	GNMTASK14 - GNM TASK14			
RA L-1-B 1-2015-223	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800			
RA L-1-B 1-2015-222	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800	QA-SYMP-CRACK	QA-CRACK	FIX SHUTOFF
RA L-1-B 1-2015-222	RICHARD'S TEST LOC W/SPACES	04/22/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800			
RA L-1-B 1-2015-219	RICHARD'S TEST LOC W/SPACES	04/21/2015 00:00	000-800 - VEHICLE INSPECTION - SEE NOTES - TASK ID 000-800	KGSYMP	R-10	ADJUSTED
RA L-1-B 1-2015-36	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			
RA L-1-B 1-2015-35	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			
RA L-1-B 1-2015-34	RICHARD'S TEST LOC W/SPACES	02/23/2015 00:00	B - PM SERVICE B			

Claim History

- To review the claim history, press **Claim History**.

The Warranty Claim History screen launches and displays the asset ID, asset number, license, and location information.

Warranty Claim History			
Asset ID	217 : 217 1985 HITACHI CQ311 750 VDC STAINLESS STEEL HEAVY RAIL TRANS 		
Asset number	H	Station Location	RCM004
License number		Repair Location	RCM004
Actions			
Months of History to Display		6	Go Show All Months

- Choose what history information to view with one of the following options:
 - Enter the number of months of history you want to view with the **Months of History to Display (0=ALL)** field. Click **Go** to filter the list.
 - Click **Show All Months** to view the entire history.

Warranty Repairs

This section details the service requests, tasks, and associated parts for the require warranty repairs.

Service Requests			
Delete	View	Service Request ID	Description
☐	View Details	312-913	R-TRUCKS-4 - COLLECTOR PADDLE MISSING/WORN
☐	View Details	312-977	R-TRUCKS-6 - COLLECTOR SHUNT STRAP BROKEN
☐	View Details	312-978	R-TRUCKS-9
☐	View Details	312-979	R-TRUCKS-9
☐	View Details	312-980	R-TRUCKS-9
☐	View Details	312-981	R-TRUCKS-9
☐	View Details	312-982	R-TRUCKS-9
☐	View Details	312-983	R-TRUCKS-6 - COLLECTOR SHUNT STRAP BROKEN
☐	View Details	312-984	R-TRUCKS-9
Tasks			

Tasks							
Delete	Manufacturer Op Codes	Task Code	Hours	Labor Cost	Parts Cost	Other Cost	Claim Amount
☐		000-901 NEW VEHICLE IN SERVICE INSP	0	0	3.41	0	3.41
☐			0	0	0	0	0

Parts						
Delete	Task	Part ID	Part Description	Cross Reference	Qty	Unit Price
☐	000-901	1000	HOSE-SILICON(RU; HOSE, SILICON, ID 2-1/2 INC	Garrett1000 Garrett Cross References: 050808056-0 ...	1	3.41
☐					0	

Work Order

The Work Order section details the work order associated with this warranty as well as the tasks and parts required for the work order.

Work Order: RALOC2-2012-39			
Work Order ID	RALOC2-2012-39	Work Order Status	CLOSED
Opened Date	12/14/2012 09:55	Opened By	RICHARD'S USER
Finished Date	10/14/2012 14:20	Finished By	RICHARD'S USER
Closed Date	12/14/2012 10:07	Closed By	RICHARD'S USER
Work Order Meter 1	250	Work Order Meter 2	0
Tasks			
Is warranty	On SR	Task Code	
		000-901 : NEW VEHICLE IN SERVICE INSPECTION	
		BO1-MA-1220 : CAR BODY GRAFFITI	
		KG1TASK1 : KG1TASK1	

Parts								
Task ID	Part ID	Description	Cross Reference	Qty	Issued Price	Total Cost	Vendor Invoice	Invoice Date
000-901	1000-0	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 GARRETT1000 GARRETT Cross References: 050808056-0 ...	1	\$3.41	\$3.41		
000-901	1000-3	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 GARRETT1000 6", HOSE GARRETT Cross References: GARRETT1000 6", HOSE-0	1	\$3.22	\$3.22		
000-901	1000A-0	HOSE-SILICON(RU); HOSE, SILICON, ID 2-1/2 INCHES, LENGTH 6 INCHES, INSTALLS ON	 Cross References: ALSTOM1000A-0 ...	1	\$5.25	\$5.25		
000-901	RA1000-0	ABS SENSOR; TEST PART	 Cross References: TEST-001-0 ...	1	\$5.35	\$5.35		
000-901	RA1001-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1000-0 Cross References: LUMINATOR-RA1000-0-0 ...	1	\$5.36	\$5.36		
000-901	RA1002-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1002-0 LUMINATOR Cross References: LUMINATOR-RA1000-0-0 ...	1	\$5.37	\$5.37		
000-901	RA1003-0	ABS SENSOR; TEST PART	 LUMINATOR-RA1003-0 LUMINATOR Cross References: LUMINATOR-RA1000-0-0 ...	1	\$5.38	\$5.38		

Claim Detail Report Link

The Claim Detail Report Link is a shortcut to run the Warranty Claim report of the claim you are looking at. For more information on the Warranty Claim Report, refer to the Directory of Standard Reports.

Edit Claim Repair Details

On the Warranty Claim detail screen, you can edit claim repair details.

Edit 3C Data

- To edit 3C data (complaint, cause, correction) or add parts to the claim, click **Edit 3C Summary** on the Claim Detail page on the right side of the Header banner.

The Warranty C/C/C Information pop-up displays.

- In the Service Request C/C/C Info area, enter additional information for the complaint, cause, or correction.



You do not have access to alter the original statements entered by the technician.

Edit Task or Part Information

Change task or part information for warranty repairs directly from the Claim Detail page.

- Edit manufacturer op codes, task code, hours, labor cost, parts cost, and other costs by making changes directly in the field of the Tasks section.

Tasks							
Delete	Manufacturer Op Codes	Task Code	Hours	Labor Cost	Parts Cost	Other Cost	Claim Amount
		01-02 TASK 01-02	5.00	0.00	0.00	0.00	0.00
		01-01 TASK 01-01	1.00	0.00	0.00	0.00	0.00
			0	0	0	0	0



The blank row cannot be deleted. It is available for additional data entry.

2. Edit the task, part ID, part description, quantity, and unit price by making changes directly in the field of the PARTS section.

Parts						
Delete	Task	Part ID	Part Description	Cross Reference	Qty	Unit Price
		0 Lookup			0	

3. To delete line items in both TASKS and PARTS, click the X at the left end of the line. This has no effect on the originating work order. When the change is saved, the line will be deleted.

Delete	Task	Part ID	Part Description	Cross Reference	Qty
		0 Lookup			

4. On the bottom right side of the screen, click **Save** to save any changes.

Move Claim to Next Status or Change Assignment

The **Change Assignment** drop-down menu on the bottom of the Claim Detail page allows you to change the assignment of the warranty with the following options: return to shop, return to writer, or send to vendor.

1. Click in the **Change Assignment** drop-down menu.
2. Select the desired action from the drop-down menu to forward the claim to the next step.
3. Click **SAVE**.

The claim becomes un-editable and is removed from your queue on the main Warranty Writer page.

4. Add comments to the Add Note section to explain the reason for the action performed and click **Save**.

The system will not allow you to return the claim to the shop without a note.

Warranty Claim: 2012-0000080		Claim Type: PART		Claim Status: IN PREPARATION	
Claim ID	Warranty Vendor	100-5661: SYNAPSE ENERGY ECONOMICS, INC.			
Claim Type	PART	Vendor Claim Number		Claim Status	RETURNED TO SHOP
Claim Date	10/14/2012	Manufacturer Time Limit	90 Days	Assigned User ID	BS
Days Left	-858 Days	Date Submitted		Claim Priority	
Work Order: RALOC2-2012-43					
Work Order ID	RALOC2-2012-43	Work order status	CLOSED		
Opened Date	12/14/2012	Opened By	RICHARD'S USER		
Finished Date	10/14/2012	Finished By	RICHARD'S USER		
Closed Date	10/02/2014	Closed By	RICHARD'S USER		
Work Order Meter 1	250	Work Order Meter 2	0		
 Add Note					

The Claim Status now displays with the action that was selected. Notes also display on the main Claim Detail page.

Settle Claim

- At the bottom of the Claim Detail page, click **Settle Claim** to launch the Warranty Claim Settlement screen. This screen allows a supervisor to enter details about the payments received from the Vendor as a response to the claim.

Warranty Claim Settlement

Claim Status

IN PREPARATION

...

Settlement Date

__/__/__

Document Number

Tax Amount

0.00

Freight Cost

0.00

Settlement By Task

Task ID		Hours	Labor	Parts	Other	Total
TR1-MA-0101	Claim charges	0.42	8.58	103.83	0.00	112.41
	Settlement Data		0.00	0.00	0.00	0.00

Close

Save

- Once the information is entered, click **Save**.

The information automatically displays in the Claim Amounts section of the Warranty Claim Detail screen.

Claim Detail Report Link

The Claim Detail Report Link is a shortcut to run the Warranty Claim report of the claim you are looking at. For more information on the Warranty Claim Report, refer to the Directory of Standard Reports.