



Service Agent Help Guide

Service Agent Starts the Claim

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Warranty Guidelines and helpful information

Purpose: To have warranty claims entered correctly to prevent returns or refusals due to lack of information or wrong information. By understanding the information needed to have warranty claims processed more quickly.

When Servicing Equipment, record and use the exact serial number listed on the equipment. If you are servicing a Walk-in, use the box serial number for issues related to the Box and Door only. If you are working on the Refrigeration/Freezer of the walk-in, use the unique serial number from the Tag found on the base plate of the condensing Unit. The serial number must be entered completely.

Some Cabinets have Alpha Numeric character in front of the serial number and those must be entered for Global Warranty to pull up the correct Model being worked on. Always verify the model and equipment location are correct when you are starting a warranty claim.

If you have purchased parts, always keep the receipt. It can be uploaded directly into Global Warranty as evidence for reimbursement.

Obtaining a work authorization number from the service department is highly recommended, but not required. Sometimes the manufacture can assist with parts needed or information on the unit being serviced. The pre-authorizations also help in the efficient processing of a claim for any extenuating circumstances, such as site security requirements or miscellaneous charges that need to be covered. Your service claim will be covered per the Warranty Guidelines of the manufacturer.

If the equipment is within the 1 year warranty period, ensure that parts needed are exchanged at the OEM wholesaler. Do not remove the wholesaler's information from the component, they will need that information to complete the exchange. If you have any questions on what can be exchanged or how to do this correctly, please contact the service department.

Please note that normal wear items, such as light bulbs, cleaning, preventive maintenance and calibration are the customer's responsibility and that information needs to be communicated to the customer and billed separately if needed.

Ensure that the email address is correct in the claim- so if more information is needed or clarification is required to process the claim, we are contacting the correct person/office where work was completed.

The Manufacturer may have more specific Warranty Guidelines that are communicated to the service agents; this information is just a guideline to assist the transition of using Global Warranty to process claims.

Building a mutual relationship of respect and trust with our service agents is critical to us in keeping our customers happy and having repeat business.

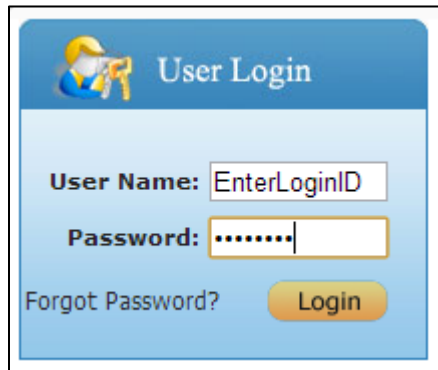
Entering a Claim

Purpose: To Show the Service Agent how to use Global Warranty to Enter a New Claim, Search for a Serial Number. Check claim status. Upload receipts.

Log into Global Warranty

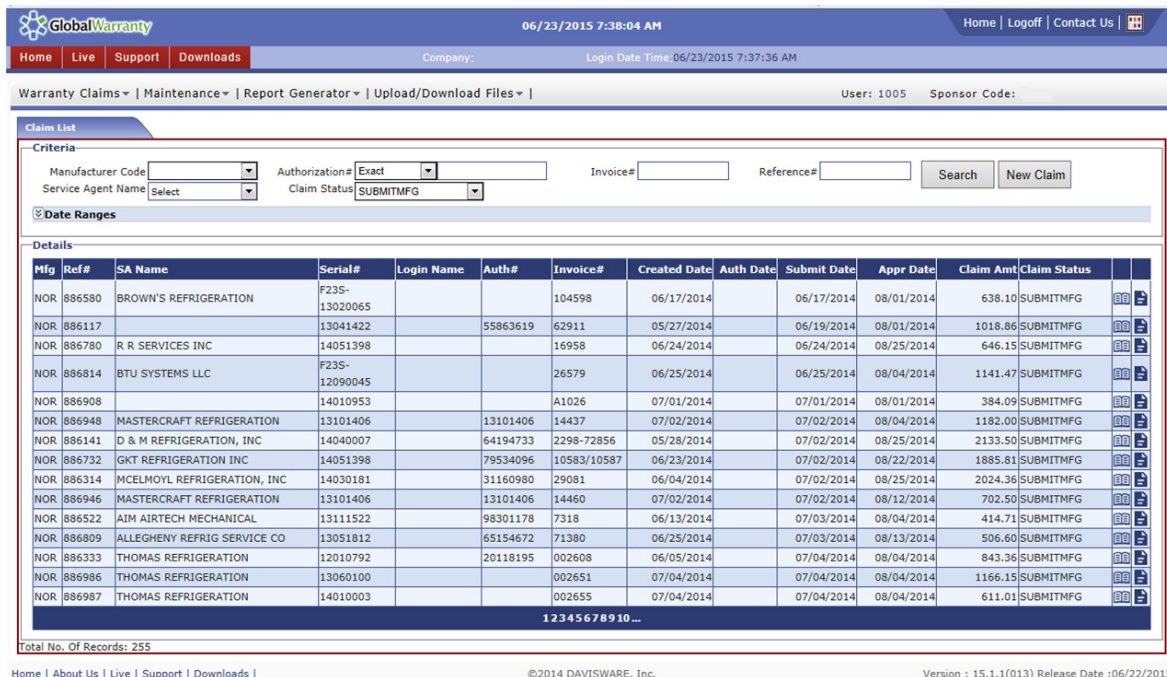
Go to <http://globalwarranty.davisware.com/globalwarranty/>

Your Login information is the same as Warranty Central. You can obtain the login information from your manufacturer if you have forgotten or do not have a login or password. The log-in for Global Warranty is case sensitive. Some accounts that were merged will have to be reset. Contact your manufacturer's service department.



The screenshot shows a 'User Login' form with a blue header. It includes a 'User Name' field with the placeholder text 'EnterLoginID', a 'Password' field with masked characters, a 'Forgot Password?' link, and a 'Login' button.

When you login to Global Warranty, you will first see the “Claim List”. More on this latter.



The screenshot displays the Global Warranty web application interface. At the top, there's a navigation bar with 'Home', 'Live', 'Support', and 'Downloads' links. Below this is a 'Claim List' section with search criteria filters for Manufacturer Code, Service Agent Name, Authorization#, Claim Status, Invoice#, and Reference#. A 'Date Ranges' section is also present. The main area shows a table of claims with columns: Mfg, Ref#, SA Name, Serial#, Login Name, Auth#, Invoice#, Created Date, Auth Date, Submit Date, Appr Date, Claim Amt, and Claim Status. The table lists various claims from different manufacturers like BROWN'S REFRIGERATION, R R SERVICES INC, BTU SYSTEMS LLC, etc. At the bottom, it shows 'Total No. Of Records: 255'.

Mfg	Ref#	SA Name	Serial#	Login Name	Auth#	Invoice#	Created Date	Auth Date	Submit Date	Appr Date	Claim Amt	Claim Status
NOR	886580	BROWN'S REFRIGERATION	F23S-13020065			104598	06/17/2014		06/17/2014	08/01/2014	638.10	SUBMITMFG
NOR	886117		13041422		55863619	62911	05/27/2014		06/19/2014	08/01/2014	1018.86	SUBMITMFG
NOR	886780	R R SERVICES INC	14051398			16958	06/24/2014		06/24/2014	08/25/2014	646.15	SUBMITMFG
NOR	886814	BTU SYSTEMS LLC	F23S-12090045			26579	06/25/2014		06/25/2014	08/04/2014	1141.47	SUBMITMFG
NOR	886908		14010953			A1026	07/01/2014		07/01/2014	08/01/2014	384.09	SUBMITMFG
NOR	886948	MASTERCRAFT REFRIGERATION	13101406		13101406	14437	07/02/2014		07/02/2014	08/04/2014	1182.00	SUBMITMFG
NOR	886141	D & M REFRIGERATION, INC	14040007		64194733	2298-72856	05/28/2014		07/02/2014	08/25/2014	2133.50	SUBMITMFG
NOR	886732	GKT REFRIGERATION INC	14051398		79534096	10583/10587	06/23/2014		07/02/2014	08/22/2014	1885.81	SUBMITMFG
NOR	886314	MCELMOYL REFRIGERATION, INC	14030181		31160980	29081	06/04/2014		07/02/2014	08/25/2014	2024.36	SUBMITMFG
NOR	886946	MASTERCRAFT REFRIGERATION	13101406		13101406	14460	07/02/2014		07/02/2014	08/12/2014	702.50	SUBMITMFG
NOR	886522	AIM AIRTECH MECHANICAL	13111522		98301178	7318	06/13/2014		07/03/2014	08/04/2014	414.71	SUBMITMFG
NOR	886809	ALLEGHENY REFRIG SERVICE CO	13051812		65154672	71380	06/25/2014		07/03/2014	08/13/2014	506.60	SUBMITMFG
NOR	886333	THOMAS REFRIGERATION	12010792		20118195	002608	06/05/2014		07/04/2014	08/04/2014	843.36	SUBMITMFG
NOR	886986	THOMAS REFRIGERATION	13060100			002651	07/04/2014		07/04/2014	08/04/2014	1166.15	SUBMITMFG
NOR	886987	THOMAS REFRIGERATION	14010003			002655	07/04/2014		07/04/2014	08/04/2014	611.01	SUBMITMFG

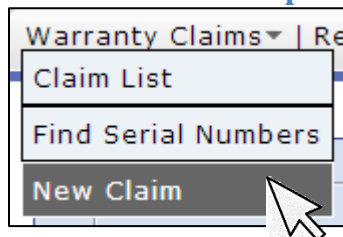
12345678910 ...

Total No. Of Records: 255

Find the “Warranty Claims” menu from the upper left of the screen and hover your mouse over it.



When the menu opens, select “New Claim” from the list.



Enter the Exact serial number and tab out of the cell. The model number will be displayed below the serial number at a minimum. The warranty days are now visible in the lower right corner. Include alpha numeric characters if applicable.

Warranty Claims ▾ | Report Generator ▾ | Registration ▾ | User : 10000466 Sponsor Code : AJA

Header		Reference	View Report
Sponsor Code	AJA	Authorization Number	Send Email
Manufacturer Code	AJA - AJANTUNES	Created Date	Policy
Account Number	10000466	Claim Status	
Service Agent	COMMERCIAL KITCHEN PARTS & SERVICE	Original Submitted Date	
Location	COMMERCIAL KITCHEN PARTS & SERVICE	Submitted Date	
Labor Rate Code	RC52 52 .52	Distributor Submitted Date	
Warranty Type	Select	Approved Date	
Currency Code	USD	Paid Date	
Currency Factor	1.0000		

Summary

Summary		WO#	SA Dispatcher Name
Serial	13071595	Work Order Date	SA Dispatcher Phone
Model	CM-100	Requested By	Processed By
Store Number		Requested Date	Authorized By
Name		Completed By	Invoice#
Name2		Completed Date	Payment Type
Contact		Customer Acceptance	Mfg.Credit#
Address		Complaint Code	WO Status
Address2		Cause Code	Claim Download
City		Action Code	Tax Code
Country	UNITED STATES - US	Fault Code	Last Processed By (Mfg)
Latitude		Action	Last Processed On (Mfg)
Longitude			Last Processed By (SA)
Territory			Last Processed On (SA)
Telephone			Last Processed By (Dist)
			Last Processed On (Dist)

Complaint

Cause

Installed Date 07/29/2013

Warranty Days Left : 230
Labor Warranty Days Left : 230

Fill out the necessary information from store number down to complaint.

The required information is highlighted by a red asterisk () In blue text.*

Warranty Claims ▾ Report Generator ▾ Master Accounts ▾																								
<div style="display: flex; justify-content: space-between;"> <div style="width: 30%;"> <p>Header</p> <p>Sponsor Code <input type="text"/></p> <p>Manufacturer Code <input type="text"/></p> <p>Account Number <input type="text" value="500495"/></p> <p>Service Agent <input type="text"/></p> <p>Location <input type="text"/></p> <p>Labor Rate Code <input type="text" value="RC00 00 00"/></p> <p>Warranty Type <input type="text" value="Select"/></p> <p>Currency Code : USD</p> <p>Currency Factor : 1.0000</p> </div> <div style="width: 30%;"> <p>Reference <input type="text"/></p> <p>Authorization Number <input type="text"/></p> <p>Created Date <input type="text"/></p> <p>Claim Status <input type="text"/></p> <p>Original Submitted Date <input type="text"/></p> <p>Submitted Date <input type="text"/></p> <p>Distributor Submitted Date <input type="text"/></p> <p>Approved Date <input type="text"/></p> <p>Paid Date <input type="text"/></p> </div> <div style="width: 30%;"> <p>View Report</p> <p>Send Email</p> <p>Policy</p> </div> </div>																								
<p>Summary</p> <div style="display: flex;"> <div style="width: 30%;"> <p>Summary</p> <p>Serial <input type="text" value="R23S-15030004"/></p> <p>Model <input type="text" value="R23-S-NDG"/></p> <p>Store Number <input type="text"/></p> <p>Name <input type="text"/> *</p> <p>Name2 <input type="text"/></p> <p>Contact <input type="text"/> *</p> <p>Address <input type="text"/> *</p> <p>Address2 <input type="text"/></p> <p>City <input type="text"/> * <input type="text" value="ST"/> * <input type="text" value="Zip"/> *</p> <p>Country <input type="text" value="United States - US"/></p> <p>Latitude <input type="text"/></p> <p>Longitude <input type="text"/></p> <p>Territory <input type="text"/></p> <p>Telephone <input type="text"/> * <input type="text"/></p> </div> <div style="width: 30%;"> <p>WO# <input type="text"/></p> <p>Work Order Date <input type="text"/></p> <p>Requested By <input type="text"/></p> <p>Requested Date <input type="text"/> *</p> <p>Form Completed By <input type="text"/></p> <p>Work Completed Date <input type="text"/> *</p> <p>Customer Acceptance <input type="text"/> *</p> <p>Complaint Code <input type="text" value="Select"/></p> <p>Action Code <input type="text" value="Select"/></p> <p>Fault Code <input type="text" value="Select"/></p> <p>Action <input type="text"/></p> <p>Installed Date <input type="text" value="04/30/2015"/></p> </div> <div style="width: 30%;"> <p>SA Dispatcher Name <input type="text"/></p> <p>SA Dispatcher Phone <input type="text"/></p> <p>Processed By <input type="text"/></p> <p>Authorized By <input type="text"/></p> <p>Invoice</p> <p>Payment Type <input type="text" value="--Select Type--"/></p> <p>Mfg.Credit# <input type="text"/></p> <p>WO Status <input type="text"/></p> <p>Claim Download <input type="text"/></p> <p>Tax Code <input type="text" value="Select"/></p> <p>Last Processed By (Mfg) <input type="text"/></p> <p>Last Processed On (Mfg) <input type="text"/></p> <p>Last Processed By (SA) <input type="text"/></p> <p>Last Processed On (SA) <input type="text"/></p> <p>Last Processed By (Dist) <input type="text"/></p> <p>Last Processed On (Dist) <input type="text"/></p> </div> <div style="width: 10%;"> <p>Extra Fields</p> <p>Extra Field1 <input type="text"/></p> <p>Extra Field2 <input type="text"/></p> <p>Compressor <input type="text"/></p> <p>Warranty <input type="text"/></p> <p>WCID <input type="text"/></p> </div> </div>																								
<p>Complaint</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>																								
<p>Cause</p> <div style="border: 1px solid black; height: 80px; width: 100%;"></div>																								
<p>Total</p> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th></th> <th style="text-align: right;">Actual Amount</th> <th style="text-align: right;">Approved Amount</th> </tr> </thead> <tbody> <tr> <td>Other Charges</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Parts Total</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Labor Total</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Tax Total</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Grand Total</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> <tr> <td>Rejected Amount</td> <td><input type="text"/></td> <td><input type="text"/></td> </tr> </tbody> </table>					Actual Amount	Approved Amount	Other Charges	<input type="text"/>	<input type="text"/>	Parts Total	<input type="text"/>	<input type="text"/>	Labor Total	<input type="text"/>	<input type="text"/>	Tax Total	<input type="text"/>	<input type="text"/>	Grand Total	<input type="text"/>	<input type="text"/>	Rejected Amount	<input type="text"/>	<input type="text"/>
	Actual Amount	Approved Amount																						
Other Charges	<input type="text"/>	<input type="text"/>																						
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Grand Total	<input type="text"/>	<input type="text"/>																						
Rejected Amount	<input type="text"/>	<input type="text"/>																						
<p>Warranty Days Left : 1026</p> <p>Labor Warranty Days Left : 1026</p>																								
<p>Confirmation</p> <p>Save Cancel</p>																								

Warranty Claim Policy Review

1. In the claim summary screen
2. Click on policy button.

The screenshot shows the 'Claim Summary' screen. At the top, there's a header with 'User: 1005' and 'SA Code:'. Below this, the 'Claim' section contains several input fields and buttons. A red arrow points to the 'Policies' button in the bottom right corner of the main form area. The 'Claim Status' is 'SUBMITMFG'. The 'Created Date' is '07/28/2014 09:09 AM'. The 'Approved Date' is '07/29/2014 01:31 PM'. The 'Paid Date' is empty. The 'Currency Code' is 'USD' and the 'Currency Factor' is '1.0000'. The 'Penalty' section has 'Penalty' selected. The 'Summary' tab is active, showing 'Serial: F235-12080189', 'WO#: 2004-125', and 'SA Dispatcher Name:'. Other tabs include 'Equipment', 'Labor Details(1)', 'Parts(0)', 'Service Company', 'File Room(0)', 'Activity(3)', 'Audit(0)', 'Contacts', 'RMALines', 'History(4)', and 'PoInfo'.

3. Policy pop up is displayed.

The screenshot shows the 'Policies' pop-up window. The window has a title bar with 'Policies' and a close button. The text inside the window reads: 'Welcome, and thank you for servicing this Master-Bilt unit. In the interest of good relations and customer communication, listed below are the Master-Bilt Warranty guidelines and service exclusions. Please review and if unclear or questions arise please contact our Master-Bilt Service Dept @ 800-684-8988 . Thank you!'. Below this, it states: 'Labor and Travel: Master-Bilt warranty labor allowance amounts cover total time needed to diagnose a problem and complete needed repairs. An additional 1-hour temperature pull down is allowed (only for part change outs that require the equipment to be shut down.) The warranty packet that you received from covers standard reasonable service times.' At the bottom, it says: 'Master-Bilt warranty will credit one charge from the following three choices: Truck/Service Charge; Travel: Travel is 1 hour maximum unless pre-approved; Mileage: Mileage is paid using Federal Guidelines.' The background shows the 'Claim Summary' screen with 'Currency Factor: 1.0000' and 'Paid Date' visible.

4. Review. This information is available on every claim and does not normally change, but is reviewed annually.

Select the “Save” button. After you click the “Save” button in the lower right corner of the page you will see additional tabs to the right of summary.

Depending on the size of the computer screen, scrolling up and down, left and right on the page may be needed.

Warranty Claims | Report Generator | Registration | User : 10000466 Sponsor Code : AJA

Header

Sponsor Code: AJA
 Manufacturer Code: AJA-AJANTUNES
 Account Number: 10000466
 Service Agent: COMMERCIAL KITCHEN PARTS & SERVICE
 Location: COMMERCIAL KITCHEN PARTS & SERVICE
 Labor Rate Code: RC52 52 .52
 Warranty Type: 55823
 Currency Code: USD
 Currency Factor: 1.0000

Reference: 619936
 Authorization Number: 1084
 Created Date: 12/10/2013 08:02 AM
 Claim Status: Staging
 Original Submitted Date:
 Submitted Date:
 Distributor Submitted Date:
 Approved Date:
 Paid Date:

View Report
 Send Email
 Policy

Summary | Equipment | Labor Details(0) | Parts(0) | Service Company | Activity(0) | File Room(0) | Audit(0) | Po Info(0) | Contacts(0) | Complaint(0)

Summary

Serial: 13071595
 Model: CM-100
 Store Number:
 Name: Frontera Grill
 Name2:
 Contact: Ted Banks
 Address: 445 N Clark St
 Address2:
 City: San Antonio St. TX Zip: 60654
 Country: UNITED STATES-US
 Latitude: 0.000000
 Longitude: 0.000000
 Territory:
 Telephone: (555) 555-5555 X

Update Address
 Validate & GeoCode

Complaint
 Enter the complaint here

Cause

WO#:
 Work Order Date: 12/10/2013
 Requested By:
 Requested Date:
 Completed By:
 Completed Date:
 Customer Acceptance:
 Complaint Code:
 Cause Code:
 Action Code:
 Fault Code:
 Action:

SA Dispatcher Name:
 SA Dispatcher Phone:
 Processed By:
 Authorized By:
 Invoice#:
 Payment Type: --Select Type--
 Mfg.Credit#:
 WO Status:
 Claim Download:
 Tax Code: Select

Last Processed By (Mfg):
 Last Processed On (Mfg):
 Last Processed By (SA): 10000466
 Last Processed On (SA): 12/10/2013 08:02 AM
 Last Processed By (Dist):
 Last Processed On (Dist):

Installed Date: 07/29/2013

Warranty Days Left : 230
 Labor Warranty Days Left : 230

The claim status will automatically change to “Staging” at this point.

You can leave the “new claim” screen or log off the global warranty program after you select save and the information will be saved.

Reference	619936	View Report
Authorization Number	1084	Send Email
Created Date	12/10/2013 08:02 AM	Policy
Claim Status	Staging	
Original Submitted Date		
Submitted Date		
Distributor Submitted Date		
Approved Date		
Paid Date		

Click on the “Labor Details” tab to enter the time on the call time, travel time, and mileage.

Click on “Add Labor Line” button near the bottom right of the page.

Enter the necessary information into the “Actual” column on the window that has opened. Click “Save” button on window when done.

Note 1: Technician is a required field.

Note 2: The “Actual” column is for use by Authorized Service Agents. Manufacturer logins will fill in the “Approved” column when necessary. You can enter labor hours by either entering a “Time Started” and “Time Completed” or directly into the “Hours” field.

Note 3: You can have more than one labor line.

	Actual	Approved
Hours Type	Regular	Regular
Hours	1.00	1.00
Travel Hours	0.75	0.75
No. of Trips	1	1
Miles	58.00	58.00
Charge Rate	52.00	52.00
Travel Rate	52.00	52.00
Miles Rate	0.52	0.52
Charge Amt.	121.16	121.16

Click on the “Parts” tab to enter the items used on the order. If you do not have a part number – you will select the miscellaneous item box and then enter a description.

Summary Equipment Labor Details() Parts()

Click on “Add Line Item” button near the bottom right of the page.

Summary Equipment Labor Details() Parts() Service Company Activity(1) File Room(1) Audit(102) Contacts(0)

Line Item

Item Number	Description	Quantity	App. Quantity	Unit Price	App. Price

Item Number

Item Description

Qty

Unit Price

App. Price

Extended Price

Other ☐

Old Serial

New Serial

Tracking Number

RMA Number

RMA Required ☒ RMA Qty.

RMA Printed ☐

Tag Number

Reference Number

Invoice Number

Distributor Number

Add Line Item **Edit Line Item**

Enter the Item Number and Quantity used on the service call. Click the “Save” button when done.

You can enter multiple different item lines.

Line Item Info

Miscellaneous Part ☐

Item Number

Item Description

Zero Price ☐ Hold ☐

Quantity App. Quantity

Unit Price App. Price

Extended Price App. Extended Price

Old Serial

New Serial

Tracking Number

RMA Number

RMA Required ☐ RMA Qty.

RMA Printed ☐ Other ☐

Tag Number

Reference Number

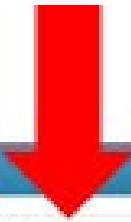
Distributor Number

Markup \$ 1

Markup \$ 2

Save **Cancel**

Select Miscellaneous Part to enter anything not identified by a specific part number. When you select the Miscellaneous part, then you need to put a short description in the item number field. Examples could be “Hoist”, R404 Refrigerant etc...



Line Item Info

Miscellaneous Part ☐

Item Number 1000906

Item Description LABEL, CONTROL PANEL

Zero Price ☐ Hold ☐

Quantity 1 App. Quantity 1

Unit Price 35.90 App. Price 35.90

Extended Price 35.90 App. Extended Price 35.90

If the part needs to be returned, the “RMA Required” box will be checked. Upon saving the part, a RMA number will be generated. Click on the individual lines to view different RMA numbers. **Master-Bilt will not be using this section at this time - it may be implemented at a later date.**

To print the RMA, scroll to the top right of the page and click the “RMA Print” button.

Line Item Info

Miscellaneous Part ☐

Item Number 1000906

Item Description LABEL, CONTROL PANEL

Zero Price ☐ Hold ☐

Quantity 1 App. Quantity 1

Unit Price 35.90 App. Price 35.90

Extended Price 35.90 App. Extended Price 35.90

Old Serial

New Serial

Tracking Number

RMA Number

RMA Required ☒ RMA Qty. 0

RMA Printed ☐ Other ☐

Tag Number

Reference Number

Distributor Number

Markup \$ 1 0.00

Markup \$ 2 0.00

Save Cancel

Summary Equipment Labor Details(1) **Parts(2)** Service Company Activity(1) File Room(1) Audit(102)

Line Item

Item Number	Description	Quantity	App. Quantity	U
1000734	HOLDER, HEAT GUARD, 4', ED2'S	1	1	
1000720	OB, LOCKING, MECHANISM, COMBI	1	1	

Item Number 1000734

Item Description HOLDER, HEAT GUARD, 4', E

Qty 1

Unit Price 14.20

App. Price 14.20

Extended Price 17.04

Other ☐

Old Serial

New Serial

Tracking Number

RMA Number 48786

RMA Required ☒ RMA Qty. 1

RMA Printed ☐

Tag Nur

Reference Nur

Invoice Nur

Distributor Nur

Add Line Item

As an option, you can select the “Activity” tab. This is where you will see any notes returned from the manufacture for needs more information, or activity history on the claim. You can see any notes or information pertaining to the claim – such as approved date, explanation of reductions etc...

Claim 1084

Header		Reference		View Report	
Sponsor Code	AJA	Reference	619936	View Report	
Manufacturer Code	AJA - AJANTUNES	Authorization Number	1084	RMA Print	
Account Number	10000466	Created Date	12/10/2013 08:02 AM	Send Email	
Service Agent	COMMERCIAL KITCHEN PARTS & SERVICE	Claim Status	Staging	Policy	
Location	COMMERCIAL KITCHEN PARTS & SERVICE	Original Submitted Date			
Labor Rate Code	RC52 52 .52	Submitted Date			
Warranty Type	Select	Distributor Submitted Date			
Currency Code	USD	Approved Date			
Currency Factor	1.0000	Paid Date			

Send Email To SA

Summary | Equipment | Labor Details(1) | Parts(5) | Service Company | **Activity(0)** | File Room(0) | Audit(82) | Po Info(0) | Contacts(0)

Activity Code	Activity Date	User	Contact	Notes

Select the “Add” button to open up the activity info. Enter a note and select save.

Activity Info X

Activity Code: Equipment Note ActCodes

Activity Date: 12/10/2013

Contact: TG

Notes: You can write a note here about the equipment.

Save Cancel

Uploading Part Pictures and Receipts

Another option, you can select the “File Room” tab. Examples of files you might want to upload are a picture of the part or piece of equipment or a copy of the invoice.

Upload all receipts including core credit receipts (if applicable). This will save time or return of claim to request compressor receipts or purchase price of components. OEM receipts are required for verification of credits due.

The screenshot shows the 'File Room' tab selected in a tabbed interface. The tabs include Summary, Equipment, Labor Details(1), Parts(5), Service Company, Activity(1), File Room(0), Audit(82), Po Info(0), and Contacts(0). Below the tabs is a 'Details' section with a table header:

Type	Image Name	Created Date	Created User	Recent Comment

Select “Browse” and find the file, then select “Upload”.

The 'Add Files' dialog box contains five rows, each with a 'Select File' label, a text input field, and a 'Browse...' button. Below these rows is an 'Operations' section with 'Upload' and 'Close' buttons.

After all entering parts, labor, optional activity and file room, return to the Summary tab.

The screenshot shows the 'Summary' tab selected in a tabbed interface. The tabs include Summary, Equipment, Labor Details(), and Parts().

Select the “Edit” button.

Whenever you leave the “Summary” tab and then return, you will need to select the “Edit” button to enter more information on the “Summary” tab

Summary

Serial	13071595	WO#		SA Dispatcher Name	
Model	CM-100	Work Order Date	12/10/2013	SA Dispatcher Phone	
Store Number		Requested By		Processed By	
Name	Frontera Grill	Requested Date		Authorized By	
Name2		Completed By		Invoice#	
Contact	Ted Banks	Completed Date		Payment Type	--Select Type--
Address	445 N Clark St	Customer Acceptance		Mfg.Credit#	
Address2		Complaint Code	Select	WO Status	
City	San Antonio	Cause Code	Select	Claim Download	
Country	UNITED STATES - US	Action Code	Select	Tax Code	Select
Latitude	0.0000000	Fault Code	Select	Last Processed By (Mfg)	
Longitude	0.0000000	Action		Last Processed On (Mfg)	
Territory				Last Processed By (SA)	10000466
Telephone	(555) 555-5555	Installed Date	07/29/2013	Last Processed On (SA)	12/10/2013 10:41 AM
				Last Processed By (Dist)	
				Last Processed On (Dist)	

Warranty Days Left : 230
Labor Warranty Days Left : 230

Complaint
Enter the complaint here

Cause

Total

	Actual Amount	Approved Amount	Hold
Freight Amount	0.00	0.00	
Expedited Freight Amount	0.00	0.00	
Diagnostic Fee Amount	0.00	0.00	
Shipping Amount	0.00	0.00	
Travel Amount	0.00	0.00	

	Actual Amount	Approved Amount
Other Charges	0.00	0.00
Parts Total	356.16	356.16
Labor Total	121.16	121.16
Tax Total	0.00	0.00
Grand Total	477.32	477.32
Rejected Amount	0.00	

Operations
Search Claim Submit Claim **Edit**

Enter the information for the remaining fields required shown below.

Warranty Claims | Report Generator | Master Accounts

Header

Sponsor Code		Reference		View Report
Manufacturer Code		Authorization Number		Send Email
Account Number	500495	Created Date		Policy
Service Agent		Claim Status		
Location	MINNEAPOLIS, MN	Original Submitted Date		
Labor Rate Code	RC00 00 00	Submitted Date		
Warranty Type	Select	Distributor Submitted Date		
Currency Code	USD	Approved Date		
Currency Factor	1.0000	Paid Date		

Summary

Serial	R23S-15030004	WO#		SA Dispatcher Name	
Model	R23-S-NDG	Work Order Date		SA Dispatcher Phone	
Store Number		Requested By		Processed By	
Name		Requested Date		Authorized By	
Name2		Completed By		Invoice	
Contact		Form Completed By		Payment Type	--Select Type--
Address		Work Completed Date		Mfg.Credit#	
Address2		Customer Acceptance		WO Status	
City		Complaint Code	Select	Claim Download	
Country	United States - US	Action Code	Select	Tax Code	Select
Latitude		Fault Code	Select	Last Processed By (Mfg)	
Longitude		Action		Last Processed On (Mfg)	
Territory				Last Processed By (SA)	
Telephone		Installed Date	04/30/2015	Last Processed On (SA)	
				Last Processed By (Dist)	
				Last Processed On (Dist)	

Warranty Days Left : 1026
Labor Warranty Days Left : 1026

Complaint

Cause

Total

	Actual Amount	Approved Amount
Other Charges		
Parts Total		
Labor Total		
Tax Total		
Grand Total		
Rejected Amount		

Confirmation
Save Cancel

After you have filled out all the information, Select “Save”

The screenshot shows the 'Warranty Claims' form with various sections: Header, Summary, Complaint, Cause, and Total. A red arrow points from the top right towards the 'Save' button in the bottom right corner. The 'Save' button is highlighted with a red box.

Header

Sponsor Code:
 Manufacturer Code:
 Account Number: 500495
 Service Agent:
 Location: MINNEAPOLIS, MN
 Labor Rate Code:
 Warranty Type: Select
 Currency Code: USD
 Currency Factor: 1.0000

Reference

Authorization Number:
 Created Date:
 Claim Status:
 Original Submitted Date:
 Submitted Date:
 Distributor Submitted Date:
 Approved Date:
 Paid Date:

Summary

Serial: R23S-15030004
 Model: R23-S-NDG
 Store Number:
 Name:
 Name2:
 Contact:
 Address:
 Address2:
 City: *St. *Zip
 Country: United States - US
 Latitude:
 Longitude:
 Territory:
 Telephone: *

Work Order

WO#:
 Work Order Date:
 Requested By:
 Form Completed By:
 Work Completed Date:
 Customer Acceptance:
 Complaint Code:
 Action Code:
 Fault Code:
 Action:
 Installed Date: 04/30/2015

SA Dispatcher

SA Dispatcher Name:
 SA Dispatcher Phone:
 Processed By:
 Authorized By:
 Invoice:
 Payment Type:
 Mfg.Credit#:
 WO Status:
 Claim Download:
 Tax Code:
 Last Processed By (Mfg):
 Last Processed On (Mfg):
 Last Processed By (SA):
 Last Processed On (SA):
 Last Processed By (Dist):
 Last Processed On (Dist):

Extra Fields

Extra Field1:
 Extra Field2:
 Compressor:
 Warranty:
 WCID:

Warranty Days Left: 1026
Labor Warranty Days Left: 1026

Total

	Actual Amount	Approved Amount
Other Charges		
Parts Total		
Labor Total		
Tax Total		
Grand Total		
Rejected Amount		

Confirmation

In the bottom section of the claim page, you can see the claim amounts. Now select the “Submit Claim” button.

The screenshot shows the 'Total' section of the claim page, displaying various amounts and a table of claim amounts. The 'Submit Claim' button is highlighted with a red box.

Total

	Actual Amount	Approved Amount	Hold
Freight Amount	0.00	0.00	<input type="checkbox"/>
Expedited Freight Amount	0.00	0.00	<input type="checkbox"/>
Diagnostic Fee Amount	0.00	0.00	<input type="checkbox"/>
Shipping Amount	0.00	0.00	<input type="checkbox"/>
Travel Amount	0.00	0.00	<input type="checkbox"/>

Operations

	Actual Amount	Approved Amount
Other Charges	0.00	0.00
Parts Total	415.73	415.73
Labor Total	121.16	121.16
Tax Total	0.00	0.00
Grand Total	536.89	536.89
Rejected Amount	0.00	

After you select “Submit Claim” a window will open summarizing the claim. If any of the top fields show a red “X”, you will need to fix the issue relating to the claim before you can submit. If you have all green check marks, you can select “Ok”. This submits the claim to the manufacturer.


Claim Submission
Claim Rules

Claim Rules	Rule Status
Claim is in warranty.	✓
Work order date is before current date.	✓
Work request date is before current date	✓
Work completed date is before current date	✓
Request date is before work completed date	✓
Labor date less than current date	✓
Invoice number included	✓
Action section completed	✓
Cause section completed	✓
Customer Acceptance	✓

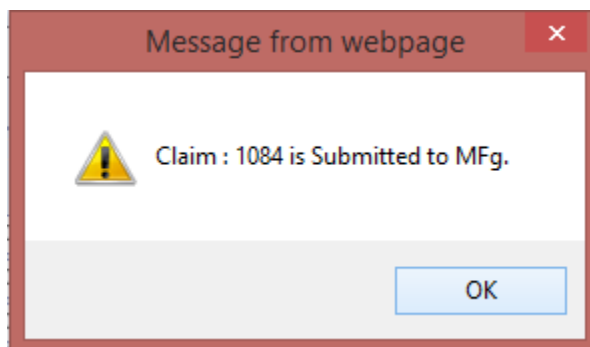
Totals

	Actual Amount	Approved Amount		Actual Amount	Approved Amount
Frieght Amount	0.00	0.00	Other Charges	0.00	0.00
Expedited Frieght Amount	0.00	0.00	Parts Total	415.73	415.73
Diagnostic Fee Amount	0.00	0.00	Labor Total	121.16	121.16
Shipping Amount	0.00	0.00	Tax Total	0.00	0.00
Travel Amount	0.00	0.00	Grand Total	536.89	536.89
			Rejected Amount	0.00	

☒ Submit Claim

Operations


A dialog box comes up letting you know that the claim is submitted to the manufacturer.

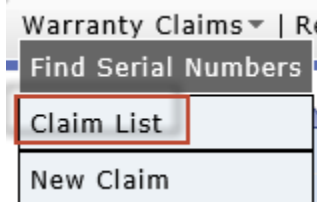


Claim List

Find the “Warranty Claims” menu from the upper left of the screen and hover your mouse over it.



When the menu opens, select “Claim List” from the list.



From the “Claim List” page you can choose to search for a claim by:

- Account Number
- Created Date
- Approved Date
- Authorized Date
- Claim Status (See further information below)
- Reference Number
- Authorization Number
- Invoice Number
- SO Number

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Home Live Support Downloads Company: Nor-lake Inc. Login Date Time: 06/23/2015 7:37:36 AM

Warranty Claims | Maintenance | Report Generator | Upload/Download Files | User: 1005 Sponsor Code: NOR

Claim List

Criteria

Manufacturer Code: NOR - Nor-Lake Inc. Authorization# Exact Invoice# Reference# Search New Claim

Service Agent Name: Select Claim Status: SUBMITMFG

☒ Date Ranges

Details

Mfg	Ref#	SA Name	Serial#	Login Name	Auth#	Invoice#	Created Date	Auth Date	Submit Date	Appr Date	Claim Amt	Claim Status
NOR	886580	BROWN'S REFRIGERATION	F235-13020065			104598	06/17/2014		06/17/2014	08/01/2014	638.10	SUBMITMFG
NOR	886117		13041422		55863619	62911	05/27/2014		06/19/2014	08/01/2014	1018.86	SUBMITMFG
NOR	886780	R R SERVICES INC	14051398			16958	06/24/2014		06/24/2014	08/25/2014	646.15	SUBMITMFG
NOR	886814	BTU SYSTEMS LLC	F235-12090045			26579	06/25/2014		06/25/2014	08/04/2014	1141.47	SUBMITMFG
NOR	886908		14010953			A1026	07/01/2014		07/01/2014	08/01/2014	384.09	SUBMITMFG
NOR	886948	MASTERCRAFT REFRIGERATION	13101406		13101406	14437	07/02/2014		07/02/2014	08/04/2014	1182.00	SUBMITMFG
NOR	886141	D & M REFRIGERATION, INC	14040007			64194733	2298-72856	05/28/2014	07/02/2014	08/25/2014	2133.50	SUBMITMFG
NOR	886732	GKT REFRIGERATION INC	14051398			79534096	10563/10567	06/23/2014	07/02/2014	08/22/2014	1885.81	SUBMITMFG
NOR	886314	MCELMOYL REFRIGERATION, INC	14030181			31160980	29081	06/04/2014	07/02/2014	08/25/2014	2024.36	SUBMITMFG
NOR	886946	MASTERCRAFT REFRIGERATION	13101406		13101406	14460	07/02/2014		07/02/2014	08/12/2014	702.50	SUBMITMFG
NOR	886522	AIM AIRTECH MECHANICAL	13111522		98301178	7318	06/13/2014		07/03/2014	08/04/2014	414.71	SUBMITMFG
NOR	886809	ALLEGHENY REFRIG SERVICE CO	13051812		65154672	71380	06/25/2014		07/03/2014	08/13/2014	506.60	SUBMITMFG
NOR	886333	THOMAS REFRIGERATION	12010792		20110195	002608	06/05/2014		07/04/2014	08/04/2014	843.36	SUBMITMFG
NOR	886986	THOMAS REFRIGERATION	13060100			002651	07/04/2014		07/04/2014	08/04/2014	1166.15	SUBMITMFG
NOR	886987	THOMAS REFRIGERATION	14010003			002655	07/04/2014		07/04/2014	08/04/2014	611.01	SUBMITMFG

12345678910...



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The claim statuses you would be interested in are:

- a. ALL – All Claims
- b. ALL PENDING-View all pending call status's (SubmitMfg, Preauthorized, Authorized)
- c. APPROVED – Claims approved by the Manufacturer
- d. APPROVED PAID – Claims approved and paid by Manufacturer
- e. HOLDMFG – Manufacturer is holding the claim awaiting more information.
- f. NEED MORE INFO – Manufacturer has looked over the claim and is requesting more information.
- g. RMAPENDING-Waiting for manufacturer to retrieve the RMA number & parts
- h. RESUBMIT-Resubmit claim to the manufacturer
- i. STAGING – These are claims the service agent is currently working on and have not been submitted to the manufacturer.
- j. SUBMITMFG-Claim has been submitted to the manufacturer from Service Agent

You can also sort the list by clicking on any of the column headings.


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Warranty Claims ▾ | Maintenance ▾ | Report Generator ▾ | Upload/Download Files ▾ |
User: 1005 Sponsor Code:

Claim List































Criteria

Manufacturer Code
Authorization#
Invoice#
Reference#

Service Agent Name
Claim Status

☒ **Date Ranges**

Details

Mfg	Ref#	SA Name	Serial#	Login Name	Auth#	Invoice#	Created Date	Auth Date	Submit Date	Appr Date	Claim Amt	Claim Status		
NOR	886580	BROWN'S REFRIGERATION	F23S-13020065			104598	06/17/2014		06/17/2014	08/01/2014	638.10	SUBMITMFG		
NOR	886117		13041422		55863619	62911	05/27/2014		06/19/2014	08/01/2014	1018.86	SUBMITMFG		
NOR	886780	R R SERVICES INC	14051398			16958	06/24/2014		06/24/2014	08/25/2014	646.15	SUBMITMFG		
NOR	886814	BTU SYSTEMS LLC	F23S-12090045			26579	06/25/2014		06/25/2014	08/04/2014	1141.47	SUBMITMFG		
NOR	886908		14010953			A1026	07/01/2014		07/01/2014	08/01/2014	384.09	SUBMITMFG		
NOR	886948	MASTERCRAFT REFRIGERATION	13101406		13101406	14437	07/02/2014		07/02/2014	08/04/2014	1182.00	SUBMITMFG		
NOR	886141	D & M REFRIGERATION, INC	14040007		64194733	2298-72856	05/28/2014		07/02/2014	08/25/2014	2133.50	SUBMITMFG		
NOR	886732	GKT REFRIGERATION INC	14051398		79534096	10583/10587	06/23/2014		07/02/2014	08/22/2014	1885.81	SUBMITMFG		
NOR	886314	MCLEMOYL REFRIGERATION, INC	14030181		31160980	29081	06/04/2014		07/02/2014	08/25/2014	2024.36	SUBMITMFG		
NOR	886946	MASTERCRAFT REFRIGERATION	13101406		13101406	14460	07/02/2014		07/02/2014	08/12/2014	702.50	SUBMITMFG		
NOR	886522	AIM AIRTECH MECHANICAL	13111522		98301178	7318	06/13/2014		07/03/2014	08/04/2014	414.71	SUBMITMFG		
NOR	886809	ALLEGHENY REFRIG SERVICE CO	13051812		65154672	71380	06/25/2014		07/03/2014	08/13/2014	506.60	SUBMITMFG		
NOR	886333	THOMAS REFRIGERATION	12010792		20118195	002608	06/05/2014		07/04/2014	08/04/2014	843.36	SUBMITMFG		
NOR	886986	THOMAS REFRIGERATION	13060100			002651	07/04/2014		07/04/2014	08/04/2014	1166.15	SUBMITMFG		
NOR	886987	THOMAS REFRIGERATION	14010003			002655	07/04/2014		07/04/2014	08/04/2014	611.01	SUBMITMFG		

1 2 3 4 5 6 7 8 9 10 ...

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To view a claim select “View”.

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Warranty Claims | Maintenance | Report Generator | Upload/Download Files | User: 1005 Sponsor Code:

Claim List

Criteria

Manufacturer Code: Authorization#: Invoice#: Reference#: Search New Claim

Service Agent Name: Claim Status:

Date Ranges

Details

Mfg	Ref#	SA Name	Serial#	Login Name	Auth#	Invoice#	Created Date	Auth Date	Submit Date	Appr Date	Claim Amt	Claim Status
NOR	886580	BROWN'S REFRIGERATION	F23S-13020065			104598	06/17/2014		06/17/2014	08/01/2014	638.10	SUBMITMFG
NOR	886117		13041422		55863619	62911	05/27/2014		06/19/2014	08/01/2014	1018.86	SUBMITMFG
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NOR	886814	BTU SYSTEMS LLC	F23S-12090045			26579	06/25/2014		06/25/2014	08/04/2014	1141.47	SUBMITMFG
NOR	886908		14010953			A1026	07/01/2014		07/01/2014	08/01/2014	384.09	SUBMITMFG
NOR	886948	MASTERCRAFT REFRIGERATION	13101406		13101406	14437	07/02/2014		07/02/2014	08/04/2014	1182.00	SUBMITMFG
NOR	886141	D & M REFRIGERATION, INC	14040007		64194733	2298-72856	05/28/2014		07/02/2014	08/25/2014	2133.50	SUBMITMFG
NOR	886732	GKT REFRIGERATION INC	14051398		79534096	10583/10587	06/23/2014		07/02/2014	08/22/2014	1885.81	SUBMITMFG
NOR	886314	MCLEMOYL REFRIGERATION, INC	14030181		31160980	29081	06/04/2014		07/02/2014	08/25/2014	2024.36	SUBMITMFG
NOR	886946	MASTERCRAFT REFRIGERATION	13101406		13101406	14460	07/02/2014		07/02/2014	08/12/2014	702.50	SUBMITMFG
NOR	886522	AIM AIRTECH MECHANICAL	13111522		98301178	7318	06/13/2014		07/03/2014	08/04/2014	414.71	SUBMITMFG
NOR	886809	ALLEGHENY REFRIG SERVICE CO	13051812		65154672	71380	06/25/2014		07/03/2014	08/13/2014	506.60	SUBMITMFG
NOR	886333	THOMAS REFRIGERATION	12010792		20118195	002608	06/05/2014		07/04/2014	08/04/2014	843.36	SUBMITMFG
NOR	886986	THOMAS REFRIGERATION	13060100			002651	07/04/2014		07/04/2014	08/04/2014	1166.15	SUBMITMFG
NOR	886987	THOMAS REFRIGERATION	14010003			002655	07/04/2014		07/04/2014	08/04/2014	611.01	SUBMITMFG

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Total No. Of Records: 255

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To view a claim report select “View Report”

Claim

Header

Sponsor Code: Manufacturer Code: Account Number: Service Agent: Location: Labor Rate Code: Warranty Type: Currency Code: Currency Factor:

Reference: Authorization Number: Created Date: Claim Status: Original Submitted Date: Submitted Date: Distributor Submitted Date: Approved Date: Paid Date:

View Report 

Summary **Equipment** **Labor Details(1)** **Parts(1)** **Service Company** **Activity(0)** **File Room(0)** **Audit(0)** **Po Info(0)** **Contacts(0)**

Summary

Serial: Model: Store Number: Name: Name2: Contact: Address: Address2: City: State: Zip: Country: Latitude: Longitude: Territory: Telephone:

Warranty Order: Work Order Date: Requested By: Requested Date: Completed By: Completed Date: Customer Acceptance: Complaint Code: Component Code: Cause Code: Action Code: Action:

SA Dispatcher Name: SA Dispatcher Phone: Processed By: Authorized By: Invoice#: Payment Type: Mfg.Credit#: WO Status: Claim Download: Tax Code:

Last Processed By (Mfg): Last Processed On (Mfg): Last Processed By (SA): Last Processed On (SA): Last Processed By (Dist): Last Processed On (Dist):

Unit is not rolling.


Warranty Days Left : 203
Labor Warranty Days Left : 203

To print a claim report select the printer icon.

CLAIM REPORT

Reference : 602223

Authorization No. :
 Service W/O# : 0357387
 Date : 11/1/2013
 Invoice# : 0357387



Print

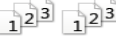
General Options

Select Printer

☒ P15 - Samsung ML-3051N ☐ Send To OneNote
☐ P16 - HP LaserJet ☐ Snagit 11
☐ P23 - Xerox ColorQube

Status: Ready ☐ Print to file
 Location:
 Comment:

Page Range
☒ All ☐ Selection ☐ Current Page
☐ Pages:
 Enter either a single page number or a single page range. For example, 5-12

Number of copies:
☒ Collate 

Services Company

Name : COMMERCIAL KITCHEN PARTS & SERVICE
 Address :
 City,State,Zip : San Antonio,TX,78207
 Phone : 210-679-3368
 Contact Name : Corinna Cheney
 Account# : 10000466

Model: UTX-200L Serial# : 13071034

Name	Value
Gas	None
Phase	0
Voltage	208

Customer Acceptance Name:

iked unit and found chains unaligned. Tried to align cain but couldn't
 ced both chains due to chains not same length
 bled unit and installed new belt and tensioners. Adjusted as necessary
 unit and tested unit working properly.

ician	Hours	Hours Type	Miles	Charge Amount
illarreal	4.50	regular	100.00	0.00

Total (Section2) : 390.00

SECTION 3

Item Number	Item Description	Quantity	Unit Price	Extended Price
7000736	VERTICAL CONVEYOR KIT	1	145.40	145.40

Serial Number of Major Component
 Alexis

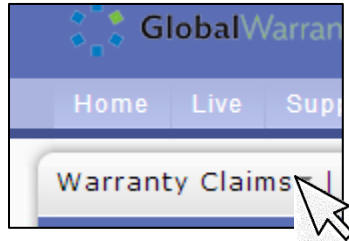
 Name of Party Completing this Report

 Title

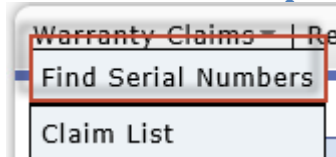
Totals
 Handling Allowance (Parts) 21.81
 Total(Section 3) 145.40
 Grand Total 557.21

Find a Serial Number

Find the “Warranty Claims” menu from the upper left of the screen and hover your mouse over it.



When the menu opens, select “Find Serial Numbers” from the list.



Enter the “Serial Number” and select search.

You will notice that the serial number is autocompleting as you type. You can also search for a serial number by “Name”, “Zip Code”, “Address”, “Telephone #”, “Part Number”, “City”, “Original Invoice Number”, “Model Number”, “State”, and “Store Number”.

You can view the summary, prior claims, activities, and model and file room.

Additional Information and Notes

If you have any questions or need any further information – contact your manufactures service department.