

Halifax Warranty Portal

Warranty - Dealer manual

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1 Introduction

This document describes the system when logged in as a dealer.

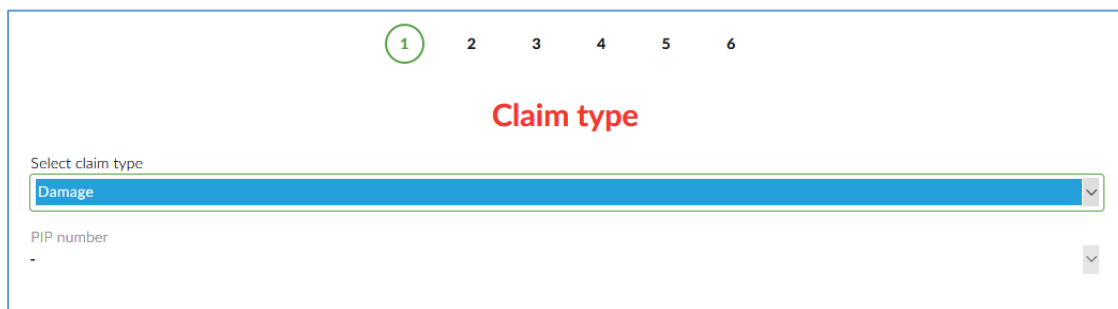
2 Claims

2.1 Create new claim

The creation of a new claim is done by a step by step wizard. The user can navigate to next or previous steps using the navigation buttons at the bottom of the screen.

2.1.1 Claim type

In the first step, the claim type is to be selected. Certain fields or steps in the wizard may be optional based on the claim type selected.



1 2 3 4 5 6

Claim type

Select claim type

Damage

PIP number

2.1.2 Contact info

In step 2, the contact information is entered. The contact information stored in the dealer is initially copied info can be copied directly to the input fields by clicking the button “Copy from dealer info”.

1 2 3 4 5 6

Claim number: 68

Dealer info

Dealer code
K21424

Name
Minneapolis Trng Ctr-Lunke

Name2
Central department

Default contact person
Johann Strauss

Address
2955 Lone Oak Drive, Suite 100

ZIP code

City
Eagan, MN

Phone
651 994 2360

E-mail

Country
United States of America

Contact info

Contact person

E-mail

Phone

Mobile

Dealer claim number

2.1.3 Machine selection

The machine on which the claim applies is selected by entering the machine's serial number. The serial number can be found more easily by searching on (a part of) the serial number, machine name, customer name or date of first use.

The amount of operating hours or hectares can be entered. At least one of both must be entered.

1 2 3 4 5 6

Machine selection

Claim number: 68

Serial number

Description

Customer

Deliver date

Handover date

Number of hectares or operating hours till defect

Hours

Hectares

Note that when the claim type is “warranty”, a machine must be linked to a customer. If this is not yet the case, the system will ask to do that right away.

Confirmation

For this type of claim it is required that the selected machine is linked to a customer first. Would you like to do it now?

Yes No

2.1.4 Defect cause description

Detailed information of the cause of defect is entered in step 4. The date of the defect can be chosen from a calendar control. The date must be either today or in the past. The fields complaint, cause and corrections are mandatory.

1 2 3 **4** 5 6 7

Defect cause description

Claim number: 68

Date of defect

Date of repair

Complaint

Cause

Corrections

2.1.5 Suspected cause and attachments

In step 5 of the wizard, the failing parts can be mentioned. The global action that was taken on that part can be chosen. Options to choose from are "Replaced", "Repaired" or "Adjusted". Attachments like photos or documents can be added for more substantiation.

1 2 3 4 **5** 6 7

Suspected cause and attachments

Claim number: 68

Failed part

Action taken

Attachments

File

Upload new file

2.1.6 Parts selection

Step 6 of the wizard consist of 3 tab pages. A tab page exists for the manufacturer's parts, warehouse parts and for the hours and travel costs.

2.1.6.1 *Manufacturer parts*

In the first tab page, the involved parts of the manufacturer can be listed. The parts can be selected from a packing list. Also all parts of a packing list can be selected at once.

1 2 3 4 5 6 7

Parts selection

Claim number: 68

PARTS
WAREHOUSE PARTS
HOURS & KILOMETERS

Packing list/delivery note

Part code

Date	Price gross	Discount %	Price net	Amount owned	Amount claimed in the past
<div style="display: flex; justify-content: space-between; align-items: flex-start;"> <div style="width: 25%;"> Amount to claim now <input style="width: 100%;" type="text"/> </div> <div style="width: 50%; text-align: center;"> <div style="background-color: #4caf50; color: white; padding: 5px 15px; border-radius: 3px; display: inline-block;">Add part to claim</div> or <div style="background-color: #4caf50; color: white; padding: 5px 15px; border-radius: 3px; display: inline-block;">Add all parts from selected packing list</div> </div> </div>					

Claim parts

Part number	Packing list/delivery note	Part name

2.1.6.2 Third party parts

Parts from third parties can be listed in the second tab page.

1 2 3 4 5 6 7

Parts selection

Claim number: 68

PARTS WAREHOUSE PARTS HOURS & KILOMETERS

Part code

Part name

Amount

Price per piece

Add part to claim

Claim parts

Part number	Part name	Net	Amount	Total	Evidence

When the value of the parts defined here exceeds a certain limit, then it is required to provide an evidence of purchase. The limit is set by the administrator in the user type settings.

Evidence required

If you add third party parts of a total value of EUR 100,00 or higher, you are required to provide an evidence of purchase (for example an invoice or a packing list).

Upload file

Cancel

2.1.6.3 Hours and kilometers

Time and travel costs are defined in the last tab. The total costs is recalculated after every change.

1 2 3 4 5 6 7

Parts selection

Claim number: 68

PARTS	WAREHOUSE PARTS	HOURS & KILOMETERS
Hours worked	<input style="width: 150px;" type="text" value="0.0"/>	X EUR <input style="width: 150px;" type="text" value="42.00"/> = EUR 0.00
Note	<div style="border: 1px solid #ccc; height: 40px;"></div>	
Kilometers driven	<input style="width: 150px;" type="text" value="0.0"/>	X EUR <input style="width: 150px;" type="text" value="0.34"/> = EUR 0.00
Note	<div style="border: 1px solid #ccc; height: 40px;"></div>	
Hours traveled	<input style="width: 150px;" type="text" value="0.0"/>	X EUR <input style="width: 150px;" type="text" value="35.00"/> = EUR 0.00
Note	<div style="border: 1px solid #ccc; height: 40px;"></div>	

2.1.7 Claim summary

In the final step, a claim summary is shown. When all detail are checked to be correct, the claim can be submitted.

1 2 3 4 5 6 7

Claim summary

Claim number: 68
Dealer code: K21424
Dealer name: Minneapolis Trng Ctr-Lunke
Serial number: 1KM0659GPGG127109
Customer name:
Claim type: Damage
Warranty end date: 00:00:00
Contact person: Johann Strauss
E-mail: trest@test.com
Phone: [651 994 2360](tel:6519942360)
Dealer claim number:
Hours till defect: 211
Date of defect: 16/05/2019
Date of repair: 30/05/2019
Tractor type: tractor 12421
Motor type (KW): 244 KW
PIP number:
Complaint: Does not work
Cause: Got broken
Correction: Fix it
Attachments:

← Previous step
Submit claim

After submitting, the claim can be printed to a PDF document.

2.2 Claims overview

The claims overview shows the all the claims for the dealer in a list. Claims can have different states.

Open

An unfinished claim. Click on the claim to proceed with the create new claim wizard.

Submitted

When clicking on a Submitted claim, the user will open the claim summary and is able to print the claim.

Under consideration

When clicking on a claim that is under consideration, the user will open the claim summary. In the claim summary, the claim can be printed or a message can be send to the back office.

Waiting for parts

Claims can be set to a status Waiting for parts by the backoffice.

When clicking on a claim that is in status “Waiting for parts”, the user will open the claim summary. In the claim summary, the claim can be printed, a message can be send to the back office or a RGA form can be printed.

Waiting for photos

Claims can be set to a status Waiting for photos by the backoffice.

Wait for internal approval

The state can be set to Wait for internal approval, for example when returned parts need to be investigated.

Served (approved)

When clicking on a Served claim, the user will open the claim summary with the options to print the claim or to send a message to the back office.

Claims overview							
Search				Submitted			
Number	Type	Submitted on	Closed on	Manager	Status	Serial number	Machine description
55	Damage	20/05/2019	-	-	Submitted	1KM0659GCGG127051	659 Pick up 4.50 m
61	Damage	20/05/2019	-	-	Submitted	1KM0659GCGG127051	659 Pick up 4.50 m
62	Damage	20/05/2019	-	-	Submitted	1KM0659GCGG127051	659 Pick up 4.50 m
68	Damage	27/05/2019	-	-	Submitted	1KM0659GCGG127109	659 Pick up 4.50 m
78	Warranty	05-10-2017	-	Bernd Espekkott	Under consideration (waiting for par	1KM0345RTGG128754	345 plus Mähversatz Claas
91	Warranty	04-10-2017	-	Bernd Espekkott	Under consideration (waiting for par	1KM0345RTGG128754	345 plus Mähversatz Claas
90	Warranty	04-10-2017	04-10-2017	Bernd Espekkott	Served (approved)	1KM0345RTGG128754	345 plus Mähversatz Claas
77	Warranty	04-10-2017	-	Bernd Espekkott	Under consideration	1KM0346RHEE123321	360 Plus Mähversatz Claas
79	Warranty	02-10-2017	02-10-2017	Bernd Espekkott	Served (approved)	1KM0345RTGG128754	345 plus Mähversatz Claas
80	Warranty	02-10-2017	02-10-2017	Bernd Espekkott	Served (approved)	1KM1200REGG127818	Anbau-Exaktfeldhäcksler C1200
81	Warranty	02-10-2017	-	Bernd Espekkott	Under consideration	1KM0346RCEE122762	360 Plus Mähversatz Claas
76	Warranty	26-09-2017	-	Bernd Espekkott	Under consideration	1KM0346RHEE123321	360 Plus Mähversatz Claas

2.3 Machines

The list of machines that are related to the dealer.

Select a machine				
Search <input type="text"/>				Show All
SerialNumber	Description	Machinetype	Dealer	Customer
1KM0649GAJK133529	649 Pick up 4,00 m	PICK UP (640)	Minneapolis Trng Ctr-Lunke Central department (K21424)	
1KM0659GCGG127051	659 Pick up 4,50 m	PICK UP (645)	Minneapolis Trng Ctr-Lunke Central department (K21424)	
1KM0659GPGG127109	659 Pick up 4,50 m	PICK UP (645)	Minneapolis Trng Ctr-Lunke Central department (K21424)	
1KM0659GTGG127108	659 Pick up 4,50 m	PICK UP (645)	Minneapolis Trng Ctr-Lunke Central department (K21424)	
1KM0690GCFG126767	690 Mähvorsatz John Deere	HEADER (375)	Minneapolis Trng Ctr-Lunke Central department (K21424)	
1KM0770GVFG126827	770 Mähvorsatz John Deere	HEADER (475)	Minneapolis Trng Ctr-Lunke Central department (K21424)	
1KM0778GCFG126826	778 Mähvorsatz John Deere	HEADER (460)	Minneapolis Trng Ctr-Lunke Central department (K21424)	

Clicking on a machine in the list will open a Zoom view with the detailed information of the machine.

Machine

Serial number
1KM0690GCFG126767

Description
690 Mähvorsatz John Deere

Machine type
HEADER (375)

Customer

Delivered on
26/11/2015

Handover date (can only be entered once)

Machine info

Address:
City:
Zipcode:
Country:

Phone:
Mobile:
Email:
Contact:

Linking a machine to a customer

Link the machine to a customer by searching on the customer name. The date of first use must be entered. After acknowledging the questionnaire of three questions the changes can be saved. Optionally an email address can be entered so the customer can receive a receipt of delivery.

Create a new customer

From the Machines detail Zoom, a new customer can be created. See Customers

2.4 Customers

The list of customers that are related to the dealer.

Select a customer

Search

Jansen	
York	01274
Johnson	
Newcastle	012778
Van Halen	
Amsterdam	056457

Adding a new or editing an existing customer will open a Zoom view for the customer details. Under the customer code and name, details are divided in three tab pages. The tab pages contain address information, contact information and machines information.

Customer

Customer code

01274

Name

Jansen

ADDRESS

CONTACT

MACHINES

Address

Street 1

ZIP code

PO2317

City

York

Country

Antarctica

Type of company

Farmer

Customer

Customer code

01274

Name

Jansen

ADDRESS

CONTACT

MACHINES

Phone:

+33 (0)23 1073418

Mobile phone

E-mail

someone@jansen.co.uk

Contact person

Jan Jansen

Customer

Customer code

01274

Name

Jansen

ADDRESS

CONTACT

MACHINES

Serial number	Description	Delivered on	In use on
1KM0360RCFF124992	360 plus Mähvorsatz Claas	20-02-2015	05-10-2016

3 Settings

3.1 Dealer info

The initial dealer information is set by the back office. Dealer information can be changed by the dealer by clicking Alter data. The data is not directly changed in the system, but a change request is send to the back office. The back office needs to maintain the dealer info.

Dealerinfo

Name	Name2:		
Minneapolis Trng Ctr-Lunke	Central department		
Default contact person			
Johann Strauss			
Address	Adress2:		
2955 Lone Oak Drive, Suite 100			
City	ZIP code	Country	
Eagan, MN		United States of America	▼
Phone:	Email		
651 994 2360			
Currency	Language		
Euro	▼ English		▼

Click the Alter data button to change the data.

Alter dealerinfo

Name	Name2:		
<input type="text" value="Minneapolis Trng Ctr-Lunke"/>	<input type="text" value="Central department"/>		
Default contact person			
<input type="text"/>			
Address	Adress2:		
<input type="text" value="2955 Lone Oak Drive, Suite 100"/>	<input type="text"/>		
City	ZIP code	Country	
<input type="text" value="Eagan, MN"/>	<input type="text"/>	<input type="text" value="United States of America"/>	▼
Phone:	Email		
<input type="text" value="651 994 2360"/>	<input type="text"/>		
Currency	Language		
<input type="text" value="Euro"/>	<input type="text" value="English"/>		▼

3.2 Users

The users of the specific dealer are listed here. All users of a dealer can manage the claims, machines and customers of that dealer.

Select a user

Show All

g.depardieu	Gerard Depardieu	Dlr - Customer Service	✓
K21424	Minneapolis Trng Ctr-Lunke	Dealer Claims and Parts	✓

Adding or editing a user is performed using a Zoom view with user details.

User

Login
g.depardieu

Full name
Gerard Depardieu

Email
g.depardieu@online.com

Type
Dlr - Customer Service

Language
French

Dealer
K21424

Active
☒

4 Help

Available help documents can be opened/downloaded here.