Halifax Warranty Portal

Warranty - Dealer manual

May 2019

Table of Contents

Business Software for a Changing World™

Data Access Europe BV / Lansinkesweg 4 / 7553 AE Hengelo, The Netherlands   +31 (0)74 255 56 09   info@dataaccess.eu   www.dataaccess.eu

1 Introduction

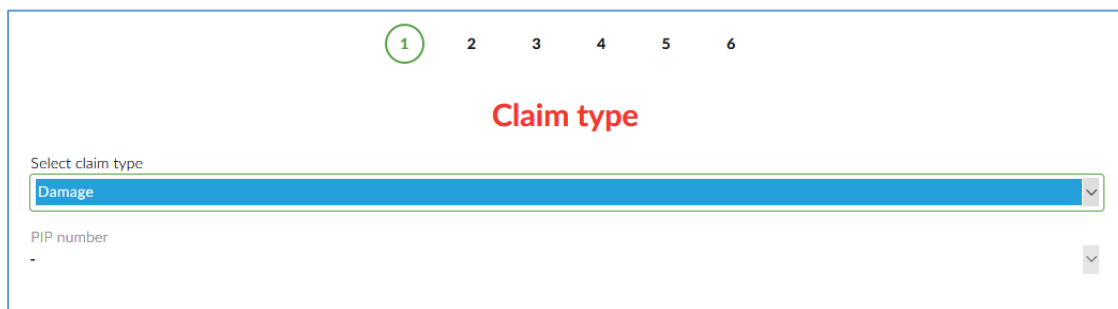This document describes the system when logged in as a dealer.

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.

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
Johann Strauss

E-mail

Phone
651 994 2360

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.

Business Software for a Changing World™

Data Access Europe BV / Lansinkesweg 4 / 7553 AE Hengelo, The Netherlands   +31 (0)74 255 56 09   info@dataaccess.eu   www.dataaccess.eu

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

Business Software for a Changing World™

Data Access Europe BV / Lansinkesweg 4 / 7553 AE Hengelo, The Netherlands   +31 (0)74 255 56 09   info@dataaccess.eu   www.dataaccess.eu

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.

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.

Business Software for a Changing World™

Data Access Europe BV / Lansinkesweg 4 / 7553 AE Hengelo, The Netherlands   +31 (0)74 255 56 09   info@dataaccess.eu   www.dataaccess.eu

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.

Business Software for a Changing World™

Data Access Europe BV / Lansinkesweg 4 / 7553 AE Hengelo, The Netherlands   +31 (0)74 255 56 09   info@dataaccess.eu   www.dataaccess.eu

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]

Business Software for a Changing World™

Data Access Europe BV / Lansinkesweg 4 / 7553 AE Hengelo, The Netherlands   +31 (0)74 255 56 09   info@dataaccess.eu   www.dataaccess.eu

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 | 0.0 | X EUR | 42.00 | = EUR 0.00 |

Note

| Kilometers driven | 0.0 | X EUR | 0.34 | = EUR 0.00 |

Note

| Hours traveled | 0.0 | X EUR | 35.00 | = EUR 0.00 |

Note

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.

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	1KM0659GPGG127109	659 Pick up 4,50 m	
78	Warranty	05-10-2017	-	Bernd Espelkott	Under consideration (waiting for par	1KM0345RTGG128754	345 plus Mähvorsatz Claas	
91	Warranty	04-10-2017	-	Bernd Espelkott	Under consideration (waiting for par	1KM0345RTGG128754	345 plus Mähvorsatz Claas	
90	Warranty	04-10-2017	04-10-2017	Bernd Espelkott	Served (approved)	1KM0345RTGG128754	345 plus Mähvorsatz Claas	
77	Warranty	04-10-2017	-	Bernd Espelkott	Under consideration	1KM0360RHEE123321	360 Plus Mähvorsatz CLaas	
79	Warranty	02-10-2017	02-10-2017	Bernd Espelkott	Served (approved)	1KM0345RTGG128754	345 plus Mähvorsatz Claas	
80	Warranty	02-10-2017	02-10-2017	Bernd Espelkott	Served (approved)	1KM1200REGG127818	Anbau-Exaktfeldhäcksler C1200	
81	Warranty	02-10-2017	-	Bernd Espelkott	Under consideration	1KM0360RCEE122762	360 Plus Mähvorsatz CLaas	
76	Warranty	26-09-2017	-	Bernd Espelkott	Under consideration	1KM0360RHEE123321	360 Plus Mähvorsatz CLaas	

2.3   Machines

The list of machines that are related to the dealer.

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

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.

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.

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
Minneapolis Trng Ctr-Lunke

Name2:
Central department

Default contact person
Johann Strauss

Address
2955 Lone Oak Drive, Suite 100

Adress2:

City
Eagan, MN

ZIP code

Country
United States of America

Phone:
651 994 2360

Email

Currency
Euro

Language
English

Click the Alter data button to change the data.

Alter dealerinfo

Name
Minneapolis Trng Ctr-Lunke   ✕

Name2:
Central department

Default contact person

Address
2955 Lone Oak Drive, Suite 100

Adress2:

City
Eagan, MN

ZIP code

Country
United States of America

Phone:
651 994 2360

Email

Currency
Euro

Language
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.

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

4   Help

Available help documents can be opened/downloaded here.