



Warranty Management

User Guide

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Section 1. Overview

Units, the components, and parts might have warranties from vendors and manufacturers. These warranties can overlap, and some portions of the unit might be excluded from the warranty. Units with the same technical specification normally have the same warranty terms, and parts purchased from a vendor will carry the same terms. Those terms can be usage-based or time-based.

M5 provides for the setup of warranties on multiple levels:

- Whole-unit warranties – Extending from the acquisition of the unit or when it was placed into service.
- Sub-unit warranties – Based on VMRS assembly codes that start at the same time or later (as with an after-market alteration).
- Part warranties – Start when a part is installed. You can set default terms at the technical specification level to be carried down during unit creation.

After setup, M5 flags violations of Whole-unit and Sub-unit warranties at the time jobs are added to work orders and violations of part warranties when the same or functionally similar part is issued. Some transactions can be excluded from warranty violations based on job characteristics or predefined Whole-unit or Sub-unit exclusions.

This document describes the setup of the three different types of warranties and how M5 flags violations and the warranty claim process.

Section 2. Technical Support

AssetWorks provides several ways to connect with the Customer Care team. Be prepared to provide detailed information to the representative. If you are reporting an issue by email, include screen images of the problem. This information provides the Customer Care representative with the necessary information to quickly and effectively respond to you.

Customer Care is available 7AM – 7PM EST Monday through Friday.

Telephone: 800.900.8152

Email: M5Support@AssetWorks.com

Website: Community.AssetWorks.com

You can use this website to open issues, review the status of past submitted issues, review and download documentation, review additional training materials, and access the latest AssetWorks news. For secure access to the website, contact Customer Care by calling the listed telephone number.

Section 3. Definitions

A **Whole-Unit Warranty** applies to the unit and everything on the unit. It starts when the unit is acquired or when it is put into service depending on a system flag. By definition, a unit can have one whole-unit warranty.

A **Sub-Unit Warranty** applies to a portion of the unit based on its VMRS (ATA) system or system-assembly coding. For example, a warranty for system 17 can be defined for the tire warranty, and further refined to 17-008 for the valve assembly. The terms of a system-assembly warranty are checked before the system terms, and the system terms are checked before the whole-unit warranty terms.

A **Part Warranty** applies to a single part issued to a unit work order. The terms of a part warranty begin when the part is issued to a unit.

Warranty Terms are defined in terms of usage (miles, kilometers, hours from a meter, or count of actions) or time (days or months). A warranty can have usage or time terms, or both, but it must have one. The time unit-of-measure, that is, days or months is set on the *Time Interval* frame.

Different warranty frames can have different units-of-measure. Terms are always “whichever comes first”, if a warranty has usage and time terms, the event must fall within both of those limits. When checking against time warranty terms, the current date and time of the event is used.

A **Warranty Violation** occurs when no exclusion applies and when:

- On a whole-unit warranty, a job is added to a work order within the warranty terms.
- On a sub-unit system-assembly warranty, a job is added to a work order within the warranty terms whose system-assembly matches.
- On a sub-unit system warranty, a job is added to a work order within the warranty terms whose system matches (regardless of the job code’s assembly).
- On a part warranty, the same part is issued within the warranty terms. If System Flag 1317 is **Y**, then a part warranty is also violated if an issued part’s VMRS system-assembly-part coding matches the warranted part’s system-assembly-part coding.
- Regardless of any defined warranties, a job is created on a work order and the job’s reason is flagged as warranty.

A **Warranty Exclusion** prevents M5 from flagging a warranty as violated, if:

- The job’s reason is flagged as *exclude from warranty*.
- The job code’s work accomplished code is flagged as *ignore warranty violations*.
- A sub-unit warranty row exists flagging the job code’s system or system-assembly as excluded.

Warranty Workflow

Settings, system flags, role privileges.

Warranty policy configuration, OEM and/or replacement parts.

Warranty part issues.

Warranty violations.

Claims.

Credits back to the unit.

Section 4. Initial Configuration

Warranty setup overview:

- Configuring Warranty System Flags
- Configuring Work Accomplished Codes
- Configuring Job Reason Codes
- Configuring Role Privileges
- Configuring Various Claim Reasons
- M5 security setup for all frames used in warranty processing

System flag considerations:

- How many warranty violations will be flagged system-wide?
- If warranty notes are required.
- Which warranty violations pop-up?
- How warranty usage and time terms are calculated.
- Valid warranty reason codes.

Work Accomplished Codes

The *Work Accomplished Codes* frame allows you to exclude or ignore warranty violations on specific **Work Accomplished Codes (WAC)**. Commonly, this feature is used for verbs such as *clean* or *prep for sale* when nothing has been damaged.

Work Accomplished Codes (Loaded 35 records)

WAC	Disabled	Use for Rebuilding Components	Ignore Warranty Violations	Ignore Repeat Repairs	Show Short Lists	Restrictions	Preparatory Work	Time Type	Description
01	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None	RT	REPAIR
02	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None	RT	INSPECT
03	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None	RT	REMOVE/REPLC
04	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None	RT	INSTALL
05	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None	RT	PERFORM
06	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None	RT	PREP SERVICE
09	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None		TROUBLESHOOT
20	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None		TRANSPORT
30	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Restrictions	None		TOWING
35	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Restrictions	None		SMART1
38	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	Restrictions	None		ANC
40	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Restrictions	None		TRANSPORT

Job Reason Codes

You can set a job reason to ignore warranty flagging. Customers will set up a warranty job reason to represent manufacturer campaigns or government-mandated recall work being done outside the usual warranty period. A customer will set up an *exclude from warranty reason* for preventive maintenance, travel time, car washes, and other work where a warranty claim will not result.

Job Reasons

Reason Code
Code: Enabled

External Data
Required: Caption: Allow Link Job: Project Code Required:

System Flags
 Ignore Warranty Flag
 Target Billing
 Cannot be Driven
 Exclude Part Usage from Automatic Reordering Calculations

Reporting Classification
Maintenance Type: Non-Maintenance

Maintenance/Non-Maintenance
 Corrective Preventive Warranty
 Road Call Seasonal Recall

Role Privileges

An Application User Role can have the authority to cancel a warranty violation on the *Work Order* or the authority to create a *Warranty Tech Spec Template*. The role privileges are: **UPD WARR TECH SPEC** and **WARR CANCELLATION**.

Warranty Claim Cancellation Reasons

If System Flag 5066 is set to **Y**, then users must enter a valid reason for the cancellation of the warranty. You can create and maintain the codes to define these valid reasons on the *Claim Cancellation Code* frame.

Claim Cancellation Code Frame

Warranty Cancellation Code (Loaded 3 records)

Reason Code	Description	Disabled
1	Not Warranty	<input type="checkbox"/>
2	Manager Decision	<input type="checkbox"/>
W	Flagged In Error	<input type="checkbox"/>
		<input type="checkbox"/>

Claim Category Definitions

You can set up and define codes that explain why claims were denied on the *Claim Denied Codes* frame.

SAVE
UNDO
REFRESH
DELETE
FIND

Claim Denied Codes

Claim Denied Codes (Loaded 5 records)

Reason Code	Description	Disabled
IREC	Invoice Reconcile	<input type="checkbox"/>
NIA	napa	<input type="checkbox"/>
OBS	OBSELETE STOCK	<input type="checkbox"/>
RTN	Return reason	<input type="checkbox"/>
RTNW	RETURN FROM W/O	<input type="checkbox"/>
		<input type="checkbox"/>

Adjust Invoice Claim Reason

The *Adjust Invoiced Claim Reason* frame allows you to create codes for use when adjusting an invoiced warranty claim.

SAVE
UNDO
REFRESH
DELETE
FIND

Adjust Invoiced Claim Reason

Adjust Claim Reasons (Loaded 2 records)

Code	Description	Disabled
1	Refund	<input type="checkbox"/>
2	Adjust Price	<input type="checkbox"/>
		<input type="checkbox"/>

Section 5. Warranty Policy Configuration

M5 allows for the configuration of two different types of warranties.

1. OEM (Original Equipment Manufacturer):
 - Bumper to bumper
 - Sub-unit (Power Train, Body, Engine, Extended)
 - Parts
2. Replacement Parts

OEM Configuration

Warranty Tech Spec

You can set up warranties at the tech spec level by using the *Warranty Tech Spec* frame. This allows you to group warranties together for units with the same tech specs. This saves time when entering warranties that are the same for a group of units. After the tech spec warranties are defined and the tech spec is applied to the unit, the warranty terms are carried down to the unit. Any changes to the terms of the warranty will not update at the unit level. Only new warranty terms applied at the tech spec level will then carry down to the unit. Any changes will need to be done at the unit warranty level.

On this frame you can define:

- OEM Whole Unit Warranty – Bumper to bumper.
- OEM Extended Warranties – Systems and assemblies.
- OEM Parts – Parts installed on the equipment at time of delivery.



Note: All warranty processing happens at the unit level.

Whole Unit Tab

Complete the steps.

1. Open the *Warranty Tech Spec* frame.
2. Enter a valid technical specification number in the **Tech Spec No.** field or use the List of Values icon to select one.
3. Select the **Whole Unit** tab.
4. If the warranty information is specific to a particular vendor, enter the vendor **Number**, if the warranty information is valid for all vendors, leave the vendor **Number** field blank. System Flag 1314 determines if the vendor field is required.

5. Enter the elapsed usage (miles, kilometers or hours) in the **Usage** field and specify the usage unit of measure (miles, kilometers) in the **Meter Type** field. This needs to match the MCC of the units assigned to this Tech Spec.
6. Enter in the elapsed time of the warranty, such as 10 years.

The screenshot shows the 'Warranty Tech Spec' form. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, and RELATED. Below the title, there is a 'Tech Spec Information' section with a 'Tech Spec' field containing '11FORDF350' and '2011 Ford F350 4 x 4', and a 'Template' checkbox. Below this is a tabbed interface with 'Whole Unit', 'Sub-Unit', and 'Parts' tabs. The 'Whole Unit' tab is active, showing 'Vendor Information' with a 'Number' field. Below that is the 'Whole Unit Warranty Details' section, which includes 'Usage' (70000.00), 'Meter Type' (Miles), 'Elapsed Time' (60), and 'Month(s)'. The 'Template' checkbox is currently unchecked.

Warranty Tech Spec Template

This screenshot is identical to the previous one, but the 'Template' checkbox in the 'Tech Spec Information' section is highlighted with a red rectangular box, indicating that it should be checked when creating a template.

If you are using a tech spec warranty as a standard, select the **Template** checkbox. Only users that have the **UPD WARR TECH SPEC** privilege are authorized to update the template.

When using the *Tech Spec Copy* functionality and flagging the existing *Warranty Tech Spec* as a template, the checkbox on the new tech spec warranty will be clear as it is only a copy and will not default to a new Tech Spec warranty template.

Sub-Unit Tab

As a practical matter, a system or system-assembly warranty with usage or time terms that are shorter than the whole unit warranty will never be used. But the whole-unit warranty will still be triggered. System and system-assembly warranties are useful only when they are longer than the whole-unit warranty. However, if System Flag 2140 is set to **Y**, M5 will check the Sub-Unit warranties first.

1. To enter extended system and assembly warranties, select the **Sub-Unit** tab.
2. Enter the **System Code** and **Assembly** (optional). The **Description** automatically populates.

3. Enter the usage or duration for the system/assembly warranty, and optionally a vendor.

A warranty might exclude certain items that are not covered by any warranty. The **Exclude Warranty** checkbox flag indicates whether the system/assembly codes are exclusions from the whole unit warranty rather than additions to it. Rows flagged with **Exclude Warranty** do not require usages or durations or vendors.

Warranty Tech Spec

Tech Spec Information

Tech Spec: 11FORDF350 2011 Ford F350 4 x 4 Template

Whole Unit Sub-Unit Parts

Sub-Unit: System-Assembly Warranty Details (Loaded 1 records)

Sys	Comp	Description	Usage	Duration Month(s)	Vendor	Exclude Warranty
16		SUSPENSION	45000.00	48		<input type="checkbox"/>

Parts Tab

Warranty Tech Spec

Tech Spec Information

Tech Spec: 11FORDF350 2011 Ford F350 4 x 4 Template

Whole Unit Sub-Unit Parts

Parts: Default Parts Warranty Terms (New record number 1)

Part No	Description	Usage	Duration Month(s)	Vendor	Exclude Warranty
					<input type="checkbox"/>

Complete the steps.

1. To enter OEM Part warranties, select the **Parts** tab.
2. Enter the **Part No** and the **Description** automatically populates. Part must be marked as a warranty part on *Part Main*.
3. Enter the **Usage** or **Duration Month(s)** for the part warranty, and optionally a **Vendor**.
4. A warranty might exclude certain items that are not covered by any warranty. The **Exclude Warranty** checkbox flag indicates whether the parts are exclusions from the whole unit warranty rather than additions to it. Rows flagged with **Exclude Warranty** do not require usages or durations or vendors.
5. The default terms on the tech spec and unit are useful only if System Flag 2093 is set to **D**.

Warranty Unit Setup

SAVE
UNDO
REFRESH
DELETE
FIND
ATTACH
RELATED ▾

Warranty Unit Setup

Unit Information

Unit No: SEH001001-A 2006 MDX 4X4 SUV

Tech Spec: 111 testing

Status: LTD Usage: Meter: Meter Date:
Active Unit: 0 0 08/16/2010

+ Whole Unit
Sub-Unit
Parts
Issued Parts

Vendor Information

Number: 1 Test Vendor

Whole Unit Warranty Details

Elapsed Time

Policy Parameters: 24 24 Month(s)

Acquisition Usage: 0 08/16/2010

In Service Information: 0 08/16/2010

Expiration: 24 08/05/2012

The *Warranty Unit Setup* frame displays the warranty terms defined at the tech spec level, expiration dates and mileages, and can be used to override the tech spec warranty. Users can add more sub-unit warranties, change the terms of the warranties that were copied from the tech spec, and change Warranty expiration, based on System Flags 1332 and 1333:

- Acquisition Date or In-Service Date.
- In-Service Date or Acquisition Meter.
- Expiration Date will display based on parameters entered.



If part warranty terms are later deleted from the tech spec, M5 does not remove them from the tech spec's units; the units retain them.

Replacement Part Warranty Configuration

The screenshot shows the 'Part Main Catalog' configuration form. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, ATTACH, and RELATED. The form is divided into several sections:

- Part Identification:** Includes fields for Number (001PART), Manufacturer, X Refs (001PART (Master No.)), Description (WWSD), Used Part No., Used Part Manufacturer, Superseded By Part, and Superseded By Part Manufacturer. There is a 'Create Duplicate' button.
- Extended Part Description:** A large text area for additional details.
- Settings:**
 - System Prices:** Standard (\$12.00), Average (\$0.00), Retail (\$0.00), Discount Code.
 - Unit of Inventory / Issue:** EACH. The 'Warranty' flag is set to 'Yes' and is highlighted with a red box.
 - Hazardous:** No.
 - Commodity:** (empty).
 - Date Added:** 02/28/2017.
 - Charge Code:** (empty).
 - Cost Category:** (empty).
- ATA Classification:** Sys/Assembly/Part, Validate Sys on Job (No).
- Location Defaults:** Stock Type (Stock), Primary Vendor (TEP-123adr), Secondary Vendor, Season Code, Serialized (No), Auto Generate Serial No (No), Reusable Serial No (No), Lotted Part (No), Core Charge, Core Tracking, Allow Mass Claims.

To track replacement part warranties, parts must have the **Warranty** flag set to Yes on the *Part Main Catalog*. After the flag is set to Yes, the *Warranty Part Setup* frame displays.

Warranty Part Setup

The screenshot shows the 'Warranty Part Setup' configuration form. At the top, there are buttons for SAVE, UNDO, REFRESH, DELETE, FIND, and RELATED. The form is divided into two main sections:

- Part/Vendor Information:**
 - Part No: 001PART, WWSD
 - Vendor No: 000000001212, 3M COMPANY
- Warranty Information:**
 - Warranty Code: 43F
 - Terms Usage: 12, UM: Count
 - Terms Time: 12, Month(s)

The default terms can be created for a specific vendor (by entering a vendor) or generically for all other vendors (by leaving it blank). The user chooses the unit-of-measure. A **Warranty Code** can be entered but it is strictly informational and has no effect on the rest of the process.

The *Warranty Part Setup* frame can also be called a menu item. The default terms on the tech spec and unit are useful only if System Flag 2093 is set to **D**.

Location Main

SAVE UNDO REFRESH DELETE FIND ATTACH MORE ▾ RELATED ▾

Location Main

Location Information
General Location: Disabled: No ▾

General Information Configuration Hierarchy Inventory Maintenance Product Codes Vendor Email Notifications

Inventory Location:

Inventory Information
Auto-Receipt on Transfer:
Inventory Account No:
Immediate Issue Upon Auto Transfer:
Allow Negative Inventory:
Internal P.O. Overhead Cost:
Inventory Carrying Cost:
Indirect Account:
Receipt Price Variance:

For NAPA locations, on Part Requests, require Approve/Ready Status before issue?

Email restock messages to:

Prefix for Part PO No:

Supervisor:

Warranty Defaults:
Warranty Vendor: Warranty Term:
Warranty Code: Warranty Usage:

If System Flag 2093 (Use (L)ocation 1st Vend or last (R)eceived-From vend or (D)efault for warr terms) is set to **D**, then default terms for all stock parts can be set up on the **Inventory** tab at the bottom.

Section 6. Warranty Part Issues

When a warranted part is charged to a work order, the clock starts with the effective date of the issue and the life-to-date usage as of when the work order was opened.

System Flag 2093 determines the rules for the terms to be applied to the part warranty on the unit. The setting establishes three different search lists for the terms.

If System Flag 2093 is **L**, M5 uses the terms from the primary vendor on the location issuing the part. The default terms as set on the Parts table of the *Warranty Tech Spec Setup* and *Warranty Unit Setup* frames are ignored.

Here is the search:

- If the user entered a vendor's cross-reference number, and the user created terms for that vendor in *Warranty Part Setup*, those terms are used.
- Otherwise, the part's inventory location's primary vendor is looked up, and if the user created terms for that vendor in *Warranty Part Setup*, those terms are used.
- Otherwise the generic terms, that is, those set up without a vendor from *Warranty Part Setup* are used.

If System Flag 2093 is **R**, M5 uses the terms from the last vendor to sell the part to the inventory location. The idea being that the user is probably issuing parts from that last receipt. The default terms as set on the Parts table of the *Warranty Tech Spec Setup* and *Warranty Unit Setup* frames are ignored.

Here is the search:

- If the user entered a vendor's cross-reference number, and the user created terms for that vendor in *Warranty Part Setup*, those terms are used.
- Otherwise, the vendor last received from is looked up, and if the user created terms for that vendor in *Warranty Part Setup*, those terms are used.
- Otherwise the generic terms, that is, those set up without a vendor from *Warranty Part Setup* are used.

If System Flag 2093 is **D**, M5 uses the default terms set on *Warranty Unit Setup*.

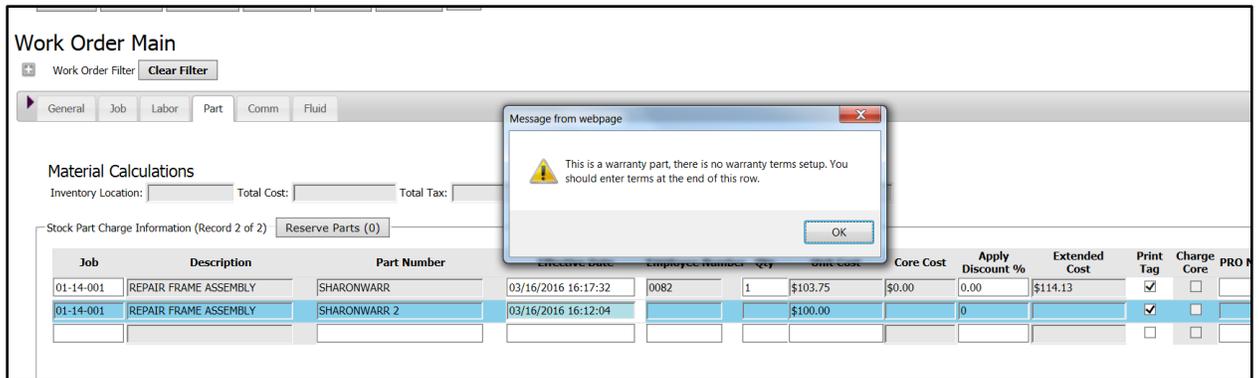
Here is the search:

- If the user entered a vendor's cross-reference number, and *Warranty Unit Setup* includes terms for that part and vendor, those terms are used.
- Otherwise, if *Warranty Unit Setup* includes terms for the part with the vendor left blank, those terms are used.
- Otherwise, if the user entered a vendor's cross-reference number, and *Warranty Tech Spec Setup* includes terms for that part and vendor, those terms are used.
- Otherwise, if *Warranty Tech Spec Setup* includes terms for the part with the vendor left blank, those terms are used.
- Otherwise, if the user entered a vendor's cross-reference number, and the user created terms for that vendor in *Warranty Part Setup*, those terms are used.

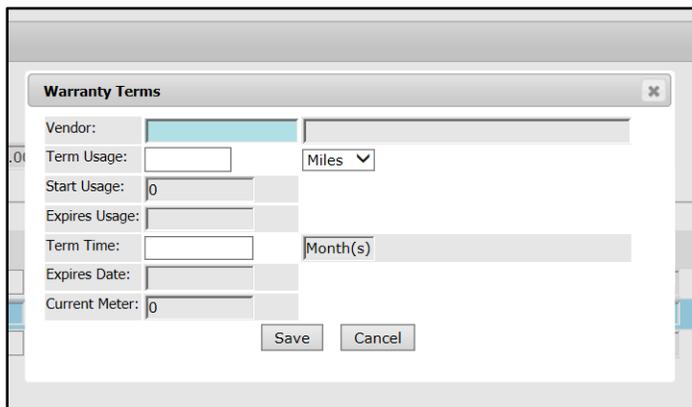
- Otherwise, the vendor last received from is looked up, and if the user created terms for that vendor in *Warranty Part Setup*, those terms are used.
- Otherwise, if it is a stock part, the inventory location defaults are used as set on *Location Main*, provided *Warranty Unit Setup* nor *Warranty Tech Spec* setup says that the part is excluded from warranty.

 **Important:** However, a default time term found from steps 1 - 4 is not used if it expired had the part been installed when the unit was new. Say the default term is found in step 1, it is one year, and System Flag 1332 says to use the in-service date as the starting point for whole-unit and system-assembly warranties. After the unit is in service for one year, the default term from step 1 will not be used and the search will continue. Default usage terms, however, will be applied regardless of how long the unit has been in service.

When issuing a part where the part warranty has not been defined, a pop-up appears.



By selecting the **Warranty Terms** button on the far-right end of the **Part** tab on *Work Order Main*, when selected, a pop-up appears so that the user can manually enter terms. The terms as seen in the pop-up are blank, that is, they do not default to the terms found in the search lists above (in fact, at this point the search has not yet been done). After entry, a **Close** button in the block saves the terms.



After applied, the part warranties can be viewed on *Warranty Unit Setup* issued **Parts** tab. The terms can be changed there, and the **Note** icon can be used to save additional notes about the warranty.

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Warranty Unit Setup

Unit Information

Unit No:

Tech Spec:

Status: LTD Usage: Meter: Meter Date:

+
Whole Unit
Sub-Unit
Parts
Issued Parts

Part: Default Unit Part Warranty Terms (Loaded 0 records)

Part No	Description	Usage	Duration	Exclude	Warranty
			Month(s)	Vendor	
(No records loaded)					

Print Part Tags

To track parts removed from units that are either under warranty or contain a core and must be sent back to the vendor, a **Part Tag** can be printed from *Work Order Main* using an icon for selected rows in the **Part** tab i-frame. A new column in the **Part** tab i-frame will automatically be selected for those parts being replaced that are under warranty.

If users want you to print a **Part Tag** for any other reason, then you must select the **Print Tag** checkbox on the part row then select the **Part Tag Print** icon on the navigation bar. System Flag 5191 determines the number of days to retain tagged warranty parts.

Part Tag	
Unit Number	CNCAR005
Year	2007
W.O. Number	533111127
Open Date	03/18/2013 12:06:35
Issue Date	06/25/2013 13:35:00
Quantity	1
Part Number	CNPART079
Part Desc	WARRANTY PART
Days	60

The **Part Tag** is designed with output as large font to be printed from regular printers on 8 1/2 X 11 size paper then taped to the part. The data on the **Part Tag** includes: *Unit Number, Year, W.O. Number, Open Date, Issue Date, Quantity, Part Number, Part Desc, and Days.*

Section 7. Warranty Violations

Flagging of warranty violations occurs during work order processing. The warranty violations can be triggered by using the warranty setup process or manually initiated on the work order.

The system attempts to flag valid warranty violations to enable warranty claims to be generated from open, completed, or closed work orders based on what has been setup in M5. Specifically, the coding choices made in:

- System Flags
- Work Accomplished Codes
- Job Reasons
- Whole Unit Warranty
- Extended System and Component Warranty (System Flag 2140 = Y, will check before Whole Unit)
- OEM Parts
- After Market (Replacement) Part Warranty

M5 flags a few different types of warranty violations:

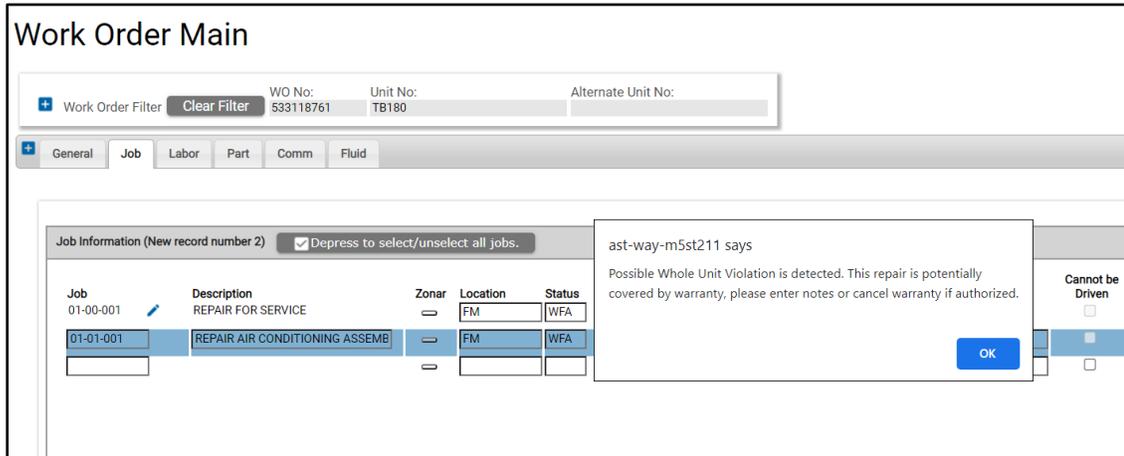
- A whole unit violation triggered from data on the *Warranty Unit Setup* frame.
- An extended system/component violation triggered from data on the *Warranty Unit Setup* frame.
- A part warranty violation triggered from data on the *Warranty Unit Setup* frame.



Important: Remember that warranty violations can be excluded based on the setup of work accomplished codes and job reasons.

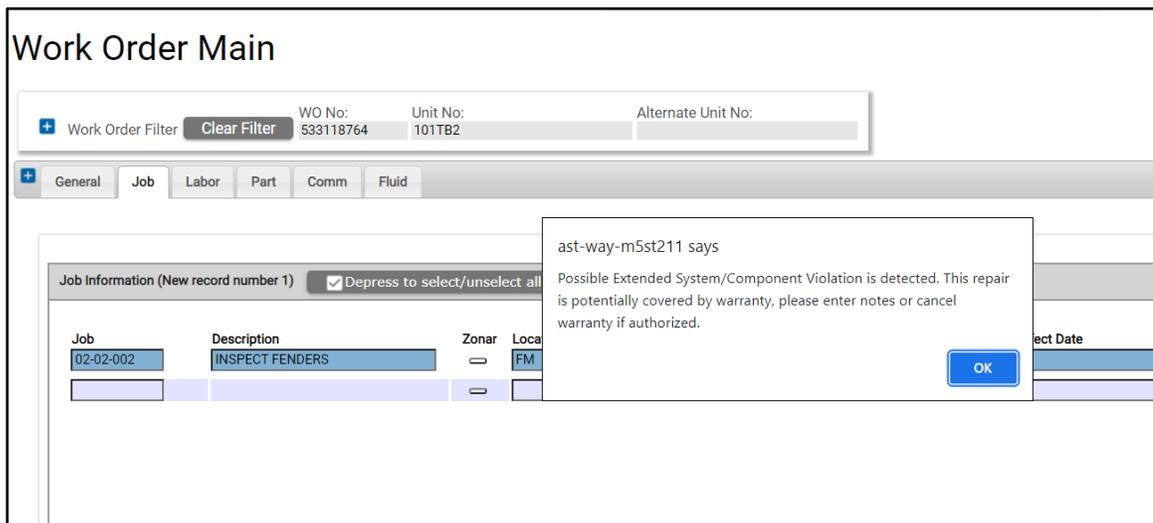
Whole Unit Warranty Violation

Adding a **Job** and job **Reason** to the work order triggers the processing for checking for warranty violations. If there are no exclusions because of work accomplished codes or job visit reasons and there is a whole unit warranty in effect, a message pop-ups after the **Job** and job **Reason** have been entered.



Extended System Violation

The same processing check applies for extended system violations. If there are no exclusions because of work accomplished codes or job visit reasons and there is not a whole unit warranty in effect, a message pop-ups after the job and reason have been entered.



Part Warranty Violation

Compared to whole-unit and system-assembly rules, part warranty rules are simple, if the same part is issued to the unit within the part warranty terms, the job is not already flagged as a violation, no job reason exclusion applies, and no work accomplished code exclusion applies, then a violation is said to occur on the part and on the job.

In addition, System Flag 1317 expands the concept of same part. If the system flag is set to Y, parts are considered to be the same if the *Part Main Catalog* indicates that the already-issued part and the newly issued part share the same ATA/VMRS system, assembly, and part. All three levels are required. In this way, superseding parts will violate the terms of their predecessors.

Parts issued with warranties are displayed on *Warranty Unit Setup* frame.



Note: System Flag 5096 - Restart Part Warranty Terms on Issued Parts? (Y or N) determines if the part warranty on the replacement part has a new part warranty or is an extension of the part that was replaced.

Changing Job Reason

If the job reason is changed to a *warranty flagged* job reason, the *Action Required* window displays.



After the user selects **OK**, then the job line will have the **Warr Violation** flag selected and display only, even if the unit does not have any warranty terms or the WAC is to ignore warranty terms.

Manual Flagging of Warranty Violation

In addition to referring to the terms, a user can manually flag a job as a warranty violation by selecting the **Warr Violation** column on *Work Order Main*. After saved, however, a violation cannot be undone.

A Quick Word on Warranty Notes

System Flags 2066 and 2067 determine if the user will have to enter notes before completing the WO. Any notes entered will display on the *Warranty Claim*. Cancelled warranty **Notes** icon is red, normal warranty notes are designated in yellow.

Section 8. Warranty Cancellation

A warranty can be cancelled when a job is flagged as a violation on the work order. The user might cancel a warranty on the job by selecting the **Warr Notes** icon.

System Flag 5066 - Validate warranty cancellation reason determines if the cancellation code must be valid.

After selecting the **Warr Notes** icon, the user needs to select the radio button for **Cancel the Warranty**. The user must have the **WARR CANCELLATION** privilege assigned to their role to proceed with cancelling. After selecting the radio button, the user must enter their username and password as well as a valid reason code (Warranty Cancellation Code).

If the user does not have the privilege of **WARR CANCELLATION**, when they enter their user id and password, they will receive an error message informing them they are not authorized to cancel the warranty.

Mass Warranty Cancellation

SAVE
UNDO
REFRESH
DELETE
FIND
RELATED ▾

Mass Warranty Cancellation

Selection Criteria

Unit:

MCC:

Tech Spec.:

Location: FM FM Parking Location

Job Code:

Job Reason:

System Code:

Work Order Open Date Range **Populate all blank cancel reason rows**

Start: End:

Cancel Reason:

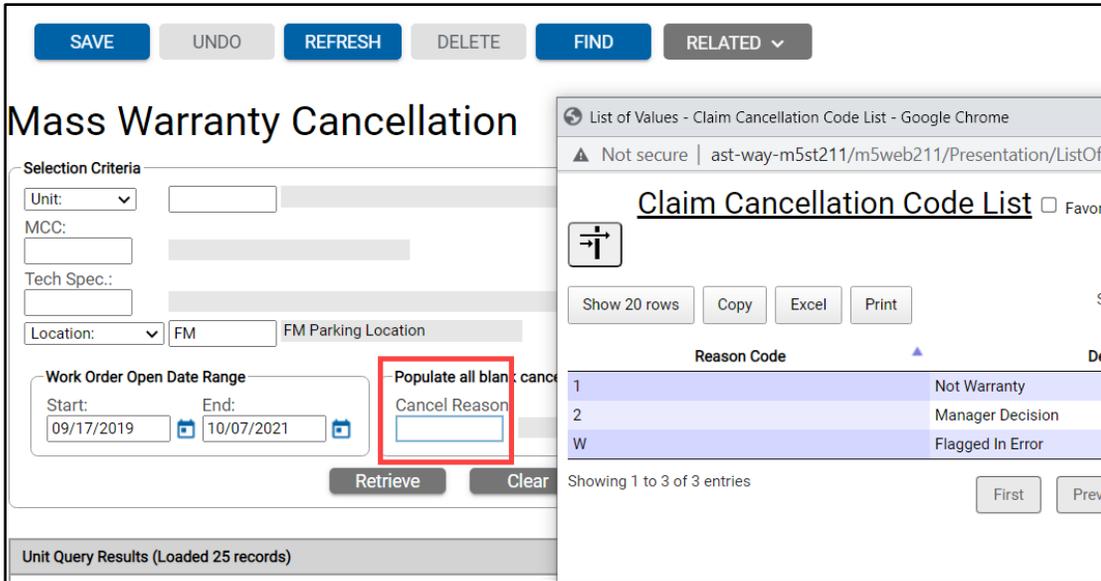
Retrieve Clear

Unit Query Results (Loaded 25 records)																
Cancel Reason	Unit	WO No.	WO Status	Warr Fl	WO Location	Months In Service	Meter Job Code	Job Open Date	Job Location	Job Rsn	Job Status	Labor Cost	Material Cost	CommJob Cost	Notes	Warr Notes
	0010	533117840	C	J	FM	0.0	0 MF-86	10/28/2019	FM	O	DON	\$0.00	\$0.00	\$8.00		
	0010	533117840	C	J	FM	0.0	0 01-01-001	10/28/2019	FM	1	DON	\$0.00	\$863.21	\$0.00		
	0016	533118182	O	J	FM	113.0	28571 57-PM-022	04/14/2020	CONN	1	WFA	\$0.00	\$0.00	\$0.00		
	10182019ROY	533117866	O	W	FM	0.0	0 05-16-004	10/31/2019	FM	V	WFA	\$0.00	\$0.00	\$297.72		
	101TB2	533118764	O	J	FM	1.0	1000 01-00-001	10/06/2021	FM	W	WFA	\$0.00	\$0.00	\$0.00		
	6225-1	533117789	O	J	FM	20.2	10 02-02-001	09/21/2019	CNLOC1	1	WFA	\$0.00	\$0.00	\$0.00		

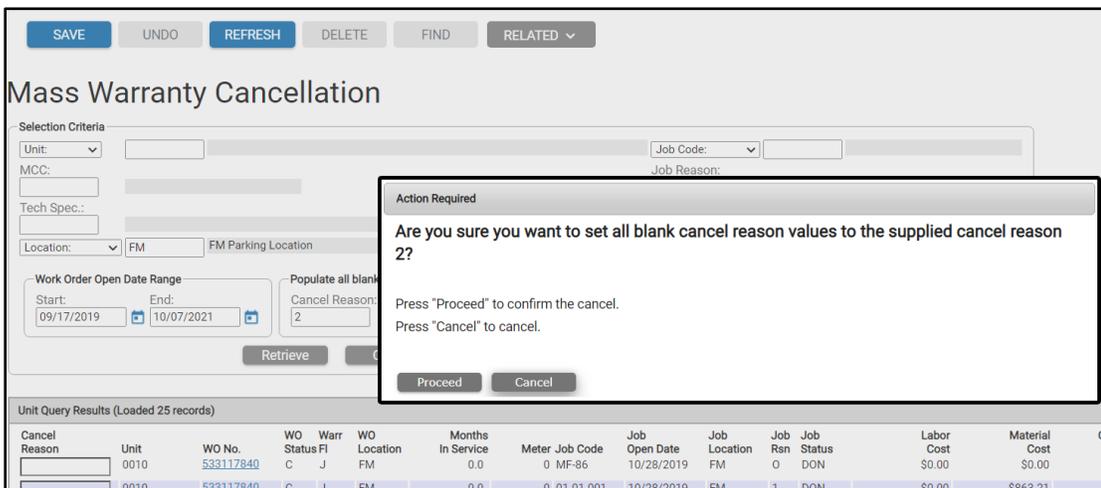
In addition to cancelling a warranty at the job level on a work order, the user can use the *Mass Warranty Cancellation* frame to cancel multiple jobs flagged as warranty at one time. The *Mass Warranty Cancellation* frame requires the user to enter the cancellation reason code per each job line or populate each job line with the same cancellation reason.

You have different options on this frame as to how you would like to query warranty jobs for cancellation. Some of the options include searching by the unit number, job code, mcc, tech spec, and location. An open date range for work orders can be specified as well.

To populate all the rows with the same reason, the List of Values can be used to select a valid *Claim Cancellation Code* reason in the **Populate all blank Cancel Reason** field.



After a reason is selected, the Action Required window displays. To set all the blank cancel reason values to the same reason, select the **Proceed** button.



The same reason will be populated on the lines selected.

If a different cancellation reason is required for each job line, use the List of Values and select the reason for each line. If the user does not have the privilege of **WARRANTY CANCELLATION**, the **Cancel Reason** field on each line is greyed out.

Section 9. Warranty Claims

Warranty claims can be processed through the M5 functionality.

If the customer chooses to process the warranty claim within M5, they will use the *Warranty Claim Manager* frame. Each warranty claim has several statuses:

- **Build** – Select jobs to claim.
- **Negotiate** – Enter amounts to claim.
- **Authorize** – Enter agreed amounts.
- **Cancel** – Close claim submitted to vendor.
- **Denied** – Vendor refuses the claim.
- **Invoice** – Applies credit to work order as negative commercial charges.

This enables the customer to track the status of each claim throughout its processing.

There are two additional role privileges, **CREATE SUBRO CLAIM** and **CREATE 3RD PARTY CLM**. If the user has one of these privileges, they will then be able to select the corresponding radio button to indicate if the warranty is in **Subrogation** or is a warranty claim with a **Third Party**.

The screenshot shows the 'Warranty Claim Manager' interface. At the top, there is a navigation bar with buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', a printer icon, and a 'RELATED' dropdown menu. Below the navigation bar, the title 'Warranty Claim Manager' is displayed. Underneath the title, there is a section for 'Select claim code:' with four radio buttons: 'Warranty Claim' (selected), 'Core Claim', 'Subrogation', and 'Third Party'. Below this is a 'Claim Information' section with input fields for 'Vendor No.', 'Claim No.', and 'Unit No.', and a 'New Claim No.' button.

Only one of the claim code radio buttons can be selected at a time. If the user should only have one of the warranty privileges, the *Warranty Claim Manager* will default to that privilege. As shown below, the user only has the CREATE SUBRO CLAIM privilege.

If the user has the **CREATE WARR CLAIM** privilege and one of the only new warranty privileges, the *Warranty Claim Manager* will default to a warranty claim.

Build Process

To start a new warranty claim process, enter the **Vendor No.** and select the **New Claim No.** button. System Flag 5093 determines if M5 automatically creates a new claim number. Use the List of Values to select the **Wo No** that contains the charges that are being claimed. If there are other claims against the work order a pop-up message will appear. To continue, select the **Continue** button, otherwise, select the **Cancel** button.

Warranty Claim Manager

Select claim code:
 Warranty Claim Core Claim Subrogation Third Party

Claim Information

Vendor No: 123
 Claim No: [New Claim No.]
 Unit No: 101TB1 2020 HONDA PILOT
 Wo No: 533118763 [Full Claim] [Full Agree]
 Claim Status: Built
 Process Emp: []
 Category: []
 Denied Rsn: []

Status and Dates

Built: 10/06/2021
 Negotiate: []
 Authorize: []
 Cancel: []
 Denied: []
 Invoice: []

The **Claim Status** is *Build*. System Flag 5114 determines if the warranty processing level is summary or detail.

Detailed level lists every charge and the summary summarizes costs by costs type such as ILAB. When System Flag 5114 set to **D** the summary frame is read-only.

The claim amount will be entered from detail frame. The claim amount and agreed amount will be entered by the user or the user can use the button to place the total job charges as **Full Claim** or **Full Agree**.

If System Flag 5098 - Require Employee Number from the Warranty Claim Manager is set to **Y**, a valid employee number must be entered in the **Process Emp** field. Use the List of Values to select one.

Warranty Claim Manager

Select claim code:
 Warranty Claim Core Claim Subrogation Third Party

Claim Information

Vendor No: 000000001201 3M COMPANY
 Claim No: 539 [New Claim No.]
 Unit No: CNCAR025 2009 C2500 4X4 SUBURBAN
 Wo No: 125GH [Full Claim] [Full Agree]
 Claim Status: BUILT RMA No: []
 Process Emp: []
 Category: []
 Denied Rsn: []
 Cancel Rsn: []

Status and Dates

Built: 06/14/2018
 Negotiate
 Authorize
 Cancel
 Denied
 Invoice

[Click to view all claim details for work order 125GH](#)

Jobs (Loaded 1 records)

Claimed	Job	Reason	Claim Type	Charge Type	Summary Total Cost	Summary Claim Amount	Summary Agreed Amount	Summary Saved Cost	Notes
	01-02	D	N	ILAB	\$30.00	\$0.00	\$0.00	\$0.00	

If System Flag 5257 – Enforce Category on Warranty Claim Manager is set to **Y**, a valid warranty claim type is required.

During the build process, there are 6 different charge types that can be claimed.

1. ILAB – Work order labor charge
2. IPAR – Work order part charge
3. CPAR – Commercial part charge
4. CMIS – Commercial misc. charge
5. CTAX – Commercial tax charge
6. CLAB – Commercial labor charge

The claim details can be viewed by using the view all claim details link in read-only mode. The **Claim Type** indicates type of claim, N – None; P – Partial; or F – Full.

Negotiation Status

After there is an ongoing discussion with the manufacturer regarding this warranty claim, the **Claim Status** changed to *Negotiate* and updated with the date.

Warranty Claim Manager

Select claim code:
 Warranty Claim Core Claim Subrogation Third Party

Claim Information

Vendor No: 123 TEP - 123adr French

Claim No:

Unit No: 101TB1 2020 HONDA PILOT

Wo No: 533118763

Claim Status: RMA No:

Process Emp:

Category:

Denied Rsn:

Cancel Rsn:

Status and Dates

Built: 10/06/2021

Negotiate: 10/06/2021

Authorize:

Cancel:

Denied:

Invoice:

Warranty Claim Manager

Select claim code:
 Warranty Claim Core Claim Subrogation Third Party

Claim Information

Vendor No: VEN2 test vendor2

Claim No: 123

Unit No: JPD1 2016 1/2 TN 4X2 PICKUP

Wo No: 533117514

Claim Status: NEGOTIATE RMA No:

Process Emp:

Category:

Denied Rsn:

Cancel Rsn:

Status and Dates

Built: 10/30/2018

Negotiate: 12/18/2018

Authorize:

Cancel:

Denied:

Invoice:

[Click to view all claim details for work order 533117514](#)

Jobs (Loaded 8 records)										
Claimed	Job	Reason	Claim Type	Charge Type	Summary Total Cost	Summary Claim Amount	Summary Agreed Amount	Summary Saved Cost	Notes	
<input type="checkbox"/>	01-03-006	1	N	CTAX	\$0.00	\$0.00	\$0.00	\$0.00	<input type="button" value="📅"/>	
<input checked="" type="checkbox"/>	01-03-006	1	F	CLAB	\$20.00	\$20.00	\$0.00	\$0.00	<input type="button" value="📅"/>	
<input type="checkbox"/>	01-03-006	1	N	CMIS	\$20.00	\$0.00	\$0.00	\$0.00	<input type="button" value="📅"/>	
<input checked="" type="checkbox"/>	01-03-006	1	F	CPAR	\$20.00	\$20.00	\$0.00	\$0.00	<input type="button" value="📅"/>	
<input type="checkbox"/>	MF-86	0	N	CLAB	\$0.00	\$0.00	\$0.00	\$0.00	<input type="button" value="📅"/>	
<input type="checkbox"/>	MF-86	0	N	CPAR	\$0.00	\$0.00	\$0.00	\$0.00	<input type="button" value="📅"/>	

The job code link is used to enter the claim amount and agreed amount.

Claim Detail

Claim Information
 Work Order: 533117514 Full Claim Full Agree

Jobs (Record 0 of 1)

Claimed	Job	Reason	Claim Type	Charge Type	Item	Amount	Claim Amount	Agreed Amount	Saved Cost Amount
<input checked="" type="checkbox"/>	01-03-006	1	F	CLAB	123	\$20.00	\$20.00	\$0.00	\$0.00
<input type="checkbox"/>									

The *Warranty Claim Manager* updates the **Claimed** checkbox.

Authorize a Claim

After the negotiation with the manufacturer, the amount that agreed upon or authorized is entered on the warranty claim and the **Claim Status** changes to *Authorized* with the date.

Warranty Claim Manager

Select claim code:
 Warranty Claim Core Claim Subrogation Third Party

Claim Information
 Vendor No: VEN2 test vendor2
 Claim No: 123 New Claim No:
 Unit No: JPD1 2016 1/2 TN 4X2 PICKUP
 Wo No: [533117514](#) Full Claim Full Agree
 Claim Status: AUTHORIZE RMA No:
 Process Emp:
 Category:
 Denied Rsn:
 Cancel Rsn:

Status and Dates
 Built 10/30/2018
 Negotiate 12/18/2018
 Authorize 12/18/2018
 Cancel
 Denied
 Invoice

[Click to view all claim details for work order 533117514](#)

Jobs (Loaded 8 records)

Claimed	Job	Reason	Claim Type	Charge Type	Summary Total Cost	Summary Claim Amount	Summary Agreed Amount	Summary Saved Cost	Notes
<input type="checkbox"/>	01-03-006	1	N	CTAX	\$0.00	\$0.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	01-03-006	1	F	CLAB	\$20.00	\$20.00	\$18.00	\$0.00	
<input type="checkbox"/>	01-03-006	1	N	CMIS	\$20.00	\$0.00	\$0.00	\$0.00	
<input checked="" type="checkbox"/>	01-03-006	1	F	CPAR	\$20.00	\$20.00	\$20.00	\$0.00	
<input type="checkbox"/>	MF-86	0	N	CLAB	\$0.00	\$0.00	\$0.00	\$0.00	
<input type="checkbox"/>	MF-86	0	N	CPAR	\$0.00	\$0.00	\$0.00	\$0.00	

Cancel a Claim

You can cancel a claim by selecting the **Cancel** status checkbox. The *Action Required* window appears asking you to confirm the action. If the claim is to be canceled, select the **Proceed** button and **SAVE** the transaction.

The screenshot shows the 'Warranty Claim Manager' interface. A modal dialog titled 'Action Required' is displayed over the main form. The dialog contains the text: 'Are you sure you want to cancel claim 123 for vendor VEN2?' and 'Press "Proceed" to confirm the cancellation. Warning: This action cannot be undone.' Below the text are two buttons: 'Proceed' and 'Cancel'. The background form shows claim details for Vendor No: VEN2, Claim No: 123, and a table of jobs with columns for Claimed, Job, Reason, Claim Type, Charge Type, and Summ Total.

You must enter a **Cancel Rsn** code. Use the List of Values to select a valid cancellation reason.

The screenshot shows the 'Warranty Claim Manager' interface. The 'Cancel Rsn' field is highlighted in blue and contains the text 'Not Needed'. The 'Status and Dates' section on the right shows the 'Cancel' checkbox selected for the date 12/18/2018. The background form shows claim details for Vendor No: VEN2, Claim No: 123, and a table of jobs.

Denied Claim

A claim can be denied by the vendor. The **Denied** checkbox is selected, and a **Denied Rsn** must be entered. The List of Values can be used to select a valid denied reason.

The screenshot shows the 'Warranty Claim Manager' interface. At the top, there are buttons for 'SAVE', 'UNDO', 'REFRESH', 'DELETE', 'FIND', 'ATTACH', and 'RELATED'. Below these is a 'Select claim code' section with radio buttons for 'Warranty Claim', 'Core Claim', 'Subrogation', and 'Third Party'. The 'Claim Information' section includes fields for Vendor No. (123), Claim No. (590), Unit No. (101TB2), and Wo No. (533118764). The 'Status and Dates' section shows 'Built: 10/06/2021', 'Negotiate: 10/06/2021', 'Authorize: 10/06/2021', 'Cancel: 10/06/2021', and 'Denied: 10/06/2021'. The 'Denied Rsn' field contains 'RTN' and has a tooltip that says 'Return reason'.

Look Up Existing Claims

To review or modify an existing claim, the user can double-click in the **Vendor No.** field which displays the *Action Required* window.

The 'Action Required' dialog box has a title bar with a close button. The main text reads: 'This field supports multiple "List of Values". Please select the desired format.' Below this are two links: '1 - List of values by vendor' and '2 - List of values by claim number'. At the bottom is a 'Cancel' button.

The **List of values by vendor** link would be selected if creating a warranty claim for the first time. **List of values by claim number** link would be selected to view or modify an existing warranty claim.

After the List of Values displays, it displays all warranty claims. Select the  icon to see the filters. Select the dropdown to select which claim code or claim status to be displayed.

The 'Claim List' interface has a 'Filter Finder' section. It includes checkboxes for 'Vendor Number', 'Work Order Number', 'Claim Date', 'Claim Number', 'Claim Status', and 'Claim Code'. There are input fields for each and a 'Search' button. A dropdown menu is open for 'Claim Code', showing options: 'All', 'Core', 'Warranty', 'Subrogation', and 'Third Party'.

Change the Warranty Vendor

Warranty Claim Vendor Number Change

Existing Vendor Information

Vendor Number: NAPA AUTO PARTS

Claim Number: Claim Status:

New Vendor Information

Vendor Number:

The vendor on a warranty can be changed by using the *Warranty Claim Vendor Number Change* frame.

The vendor number and claim number to be changed are entered on this frame. The **Claim Status** is displayed. Use the List of Values to select another vendor number. Then **SAVE** the transaction.

Generating Warranty Claim Invoice Documents

The *Warranty Claim Manager* frame allows the user to email the warranty invoice report (as defined in report options) directly to the vendor to which the claim was created. The ability to email a warranty claim invoice report to the default vendor email address or to a specified email address has been added. The default option is print only. Other valid options are email only or print and email.

Generate Warranty Claim Invoice Documents

Generate Warranty Claim Invoice

Vendor No:

Claim No:

Print/Email Options

Print Only: Email Only: Print and Email:

Email Address:

To schedule the print/email, select the **Schedule Print/Email Request**. The following is a sample of the standard *Work Order Claim Invoice*.

Work Order Claim		Fleet Services Report Printed: 03/30/2016 10:54:46 By User: SHARON
Claim No: 409	Work Order No: 533115629	
Vendor Claim No:	Process Employee:	
Warranty Type: INTERNAL WARRANTY		
Vendor: NAPA	Vendor Name:	
Address: PA		
Location: CONN - CONNELLSVILLE WEST SIDE		
Location Address: SOUTH SEVENTH AVE CONNELLSVILLE PA 123 456		
Registration Nbr: 414061	Unit Description:	
Serial Number:	Chassis Number: 2222	
Vehicle Type: 2011 Ford F350 4 x 4	Manufacturer: FORD	
Date Registered: 04/09/2012	Mileage: 0	

Section 10. Claim Credit

When the warranty claim dollars are received, it is important to update the warranty claim.

When the invoice dollars are entered on the claim, the credit for the warranty dollars are credited to the work order as a commercial charge.

No further changes can be made to the warranty claim unless you enter an **Adjustment Rsn**. If a Return Material Authorization number is required by the vendor when returning warranted parts, it can be entered in the **RMA No** field. The **Invoice** checkbox is updated with the date.

Warranty Claim Manager

Select claim code:
 Warranty Claim Core Claim Subrogation Third Party

Claim Information

Vendor No: MCVEND	MC Vendor	
Claim No: 538	New Claim No:	
Unit No: MC345		
Wo No: 533117448	Full Claim	Full Agree
Claim Status: INVOICE	RMA No:	
Process Emp:		
Category:		
Denied Rsn:		
Cancel Rsn:		
Adjust Rsn:		

Status and Dates

Built 05/24/2018

Negotiate 05/24/2018

Authorize 05/24/2018

Cancel

Denied

Invoice 12/19/2018

[Click to view all claim details for work order 533117448](#)

Jobs (Loaded 4 records)

Claimed	Job	Reason	Claim Type	Charge Type	Summary Total Cost	Summary Claim Amount	Summary Agreed Amount	Summary Saved Cost	Notes
<input type="checkbox"/>	05-02	P	N	CLAB	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
<input type="checkbox"/>	05-02	P	N	CMIS	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
<input type="checkbox"/>	05-02	P	N	CTAX	\$0.00	\$0.00	\$0.00	\$0.00	<input type="checkbox"/>
<input type="checkbox"/>	05-02	P	N	IPAR	\$2,025.85	\$0.00	\$1,876.00	\$0.00	<input type="checkbox"/>

Work Order Main – Commercial tab

To see the credits navigate to the *Work Order Main* – **Commercial** tab. The **Ref No/Contract No** will be the **Warranty Claim No**.

Work Order Commercial Charge Query

You can also navigate to the *Work Order Query* frame and double-click on the *Query Results* to see the details.

Adjust Invoice Amount

If you need to make an adjustment to the invoice amount, enter a valid **Adjust Invoiced Claim Reason**. Use the List of Values to select one.

Section 11. Additional Information

Interface

! **Alert:** Care should be taken when running this interface as all Unit level data will be overwritten by the Tech Spec terms. If unit level warranties have been added in addition to those at the tech spec level, they will be deleted as part of the interface.

The **M5-STD-UNITWARR-UPDATE** interface is a standard interface that will select tech spec warranties based on the given parameters and will push the warranty terms for the Whole Unit, Sub-Unit, and Part Warranties down to the unit level for the units assigned to these tech specs.

You can set up parameters to specify that any or all the Whole Unit, Sub-Unit, and or Parts warranties are affected. This can eliminate specific units or ranges of units based on Unit number and VIN.

The purpose of this interface is to read the terms of a tech spec warranty and push any changes, including updates and deletions down to the unit level.

This interface is run from the *Interface Manger* frame.

Parameters

Parameter	Description
LAST RUN DATE	Date the interface was last run - no need to fill in, automatically populates after each run.
EMAIL TO	Internet-style email address of the person or group to receive an email upon completion of the interface.
INCLUDE TECH SPEC FROM	A valid M5 Tech Spec. Leave the next parameter blank, if only a specific Tech Spec is to be selected. If this parameter and the following one are left blank, all Tech spec warranties will be updated.
INCLUDE TECH SPEC TO	A valid M5 Tech Spec. If entered and above is valued, the program will select where spec_no between the value in INCLUDE TECH SPEC FROM and the value in INCLUDE TECH SPEC TO.
EXCLUDE UNIT NUMBER FROM	A valid M5 Unit Number. Leave the next parameter blank, if only a specific Unit Number is to be excluded from the update.

Parameter	Description
EXCLUDE UNIT NUMBER TO	A valid M5 Unit Number. If entered and the above is valued, the program will select where unit_no is NOT between the value in EXCLUDE UNIT NUMBER FROM and the value in EXCLUDE UNIT NUMBER TO.
EXCLUDE VIN FROM	A valid M5 Serial Number. Leave the next parameter blank, if only a specific VIN number is to be excluded from the update.
EXCLUDE VIN TO	A valid M5 Serial Number. If entered and the above is valued, the program will select where serial_no is NOT between the in EXCLUDE VIN FROM and the value in EXCLUDE VIN TO.
EXCLUDE WHOLE WARRANTY	Y or N. If N, changes to terms on the Tech Spec Whole Warranty will be pushed down the Unit Whole Warranty level. If Y, Unit Whole Warranty terms will not be updated.
EXCLUDE SUB-UNIT WARRANTY	Y or N. If N, changes to terms on the Tech Spec Sub-Unit Warranty will be pushed down to the Unit Sub-Unit Warranty level. If Y, Unit Sub-Unit Warranty terms will not be updated.
EXCLUDE PART WARRANTY	Y or N. If N changes to terms on the Tech Spec Part Warranty will be pushed down to the Unit Part Warranty level. If Y, Unit Part Warranty will not be update.

System Flags

See the *System Flags Table* guide for a complete listing of system flags.

Reports

There are several standard reports available in M5 that can be used to report on warranty terms and warranty violations.

Unit Warranty Terms

The *Unit Warranty Terms Report* is a listing by unit that shows the warranty terms for the whole unit, the system-assembly and the parts. It includes the vendor, the unit serial number, tech spec, in-service details, and the current meter reading.

Unit Warranty Terms							<i>Fleet Services</i>
							<i>Report Printed: 11/30/2016 11:01:29 By User:</i>
Tech Spec: ARK TECH SPEC - ARK Tech Spec							
Unit No:	AK1 - 2015 TOYOTA PRIUS			Serial No:	FSDGJHFD		
Tech Spec:	ARK TECH SPEC	ARK Tech Spec					
In-Service Date:	01/03/2015	In-Service Meter:	3.00	Months In-Service:	22	Current Meter:	101.00
Warranty Description	Vendor	Months	Expires	Usage	Expires		
MANUFACTURER'S WHOLE UNIT WARRANTY	1-Test Vendor	60	03-Jan-2020	100,000	100,001		
System-Assembly Warranty							
13-001 FRONT BRAKES & DRUMS1	-	60	01/03/2020	10,000	10,001		
Part Warranty							
CLW01-WARRANTY [ART	1-Test Vendor	12	29-Sep-2017	5,000	5,100		

Warranty Job Costs

The *Warranty Job Costs* report is a list of warranty job costs by job location. It lists the work order number, unit number the job open date, and costs of the warranty job.

Warranty Job Cost													<i>Fleet Services</i>
													<i>Report Printed: 11/30/2016 11:06:46 By User:</i>
Work Order	Unit No	Job Open Date	Job Code	Job Location	Status	Job Rsn	Warr Viol	Warranty Claim No	Labor Cost	Part Cost	Comm Cost	Total Cost	
Job Location: CNLOC1 - work order location 001													
533114369	CNCAR007	02/02/2009 23:00:00	01-02	CNLOC1	DON	W	J	278	40.00	0.00	0.00	40.00	
533114369	CNCAR007	02/02/2009 23:00:00	01-03	CNLOC1	DON	W	J	278	60.00	0.00	(75.00)	(15.00)	
533114369	CNCAR007	02/02/2009 23:00:00	01-04	CNLOC1	DON	W	J	278	0.00	3.40	0.00	3.40	

Work Order Cost Detail Warranty

The *Work Order Cost Detail* warranty report lists jobs by work order in detail displaying the work order information and all costs for the warranty jobs.

Work Order Cost Detail				Fleet Services	
Report Printed: 11/30/2016 11:08:34 By User: [redacted]					
Work Order:	533114369	Unit No:	CNCAR007	2009 C2500 4X4 SUBURBAN	
WO Status:	Closed	WO Location:	CNLOC1	Alt Unit No:	007
Date Opened:	02/02/2009 23:00:00	WO Reason:	UNSCHEDULED	Serial No:	SNCAR007
Date Complete:	12/31/2009 23:00:00	Meter 1 - M:	200	License No:	AAA
Date Closed:	12/31/2009 23:00:00	Meter 2 - H:	0	Tech Spec:	CNTECHSPEC1
Using Dept:	CNDEPT001 - department 001			Maint. Class:	CNMCC1
Repair Job: 01-01 - REPAIR AIR CONDITIONING, HEAT, VENT				Total Job Cost:	219.32
Job Location:	work order location 001	Labor Hours:	0.00	Labor Cost:	0.00
Repair Reason:	BREAKDOWN	Warranty Violation:	None		
Vendor No.	Invoice No.	Purchase Order No.	Total Cost		
CNVENDOR001	278	000000000002507	0.00		
CNVENDOR001	278	000000000002506	0.00		
CNVENDOR001	278	000000000002505	-75.00		
CNVENDOR001	279		0.00		
CNVENDOR001	279		0.00		
CNVENDOR001	279		0.00		
CNVENDOR001	279		0.00		
Parts	Description	Quantity	Total Charges	Unit Price	Total Cost
CNPART026	WARRANTY PART		56.65		56.65
CNPART010	PART 010		22.38		134.27
CNPART002	PART 001		3.40		3.40
			Total Charges		-75.00
					194.32
Warranty Complaint Notes					
Warranty Cause Notes					
Warranty Correction Notes					

Work Order Warranty Cancellation

The work order *Warranty Cancellation Report* is a listing by work order that shows warranty violations and includes the job code and description, the job reason, location, and warranty violation detail.

Warranty Cancellation Journal							Fleet Services
Report Printed: 11/30/2016 11:09:06 By User: [redacted]							
Work Order	Unit	Job	Job Description	Reason	Location	Warranty Violation	
Violation: J - Job Reason							
533115220	CL03	57-11-003	TESTING Torque Check at 100 miles	W	FM	JOB REASON	
Complaint:							
Cause: not							
Correction: note2							
	Status	Status Date	Status Changed By User	Cancel Code			
	C	12/04/2015 12:30:34	LEONARD.WRZESINSKI	Not Warranty			
533116493	AK10	01-16-003	REPAIR FRONT SHOCK ABSORBERS	W	FM	JOB REASON	
Complaint:							
Cause:							
Correction:							
	Status	Status Date	Status Changed By User	Cancel Code			
	C	10/21/2016 08:37:55	ARUNA.KATTEBOENA	Manager Decision			

Work Order Warranty Violations

The *Work Order Warranty Violations* report lists all units with potential warranty violations and includes the work order number, the job code, its description, location, status, cost, open date LTD usage, and the violation detail.

Work Order Warranty Violations											Fleet Services
											Report Printed: 11/30/2016 11:12:06 By User: [REDACTED]
Work Order	Job Code	Job Description	Job Location	RE	Stat	Labor Hrs	Job Cost	Job Open Date	LTD Usage	Violation	Ccl
System: 00 - COMPLETE UNIT											
Unit: 12		1990 SULLAIR UNKNOWN				In-Service Date: 03/01/2012		VIN: 1221121			
533116268	01-00-001	REPAIR FOR SERVICE	FM	W	WFA	0.0	0.00	08/03/2016	0.00	Job Reason	
Unit Job Count and Total Cost:						0.0	0.00				
Unit: 20348		2000 1550 1 RL TRAILER				In-Service Date: 10/31/2000		VIN: 1F9RB1215YV048138			
533116326	01-00-001	REPAIR FOR SERVICE	FM	1	WFA	0.0	0.00	09/02/2016	0.00	Whole Unit	
Unit Job Count and Total Cost:						0.0	0.00				
Unit: ASSET01		2008 VOLVO S80				In-Service Date: 01/01/2016		VIN: 23183829380			
533116220	01-00-001	REPAIR FOR SERVICE	FM	1	DON	0.0	0.00	07/18/2016	0.00	Whole Unit	
533116371	01-00-001	REPAIR FOR SERVICE	FM	2	DON	0.0	40.00	09/21/2016	12.00	Whole Unit	
Unit Job Count and Total Cost:						0.0	40.00				

Section 12. Updates

The following updates apply to the *Warranty Management User Guide*.

Release	Section	Description
25.0	All sections	Applied miscellaneous writing style updates throughout the document.
24.0	Additional Information – System Flags	Updated the reference to the System Flags Table guide. Removed the System Flags table.
23.2	All sections	Applied miscellaneous writing style updates throughout the document.
23.1	Additional Information – System Flags	Added new system flag 5522.