



Service Agent Help Guide

Service Agent Starts the Claim

Table of Contents

- Warranty Guidelines..... 3**
- Entering a Claim 4**
 - Log into Global Warranty.....4
 - Warranty Policies.....7
 - Labor, Travel and Mileage.....9
 - Parts, Miscellaneous Line Items, RMAs.....10-11
 - Claim Activity Notes.....12
 - Uploading Receipts.....13
 - Editing a claim.....14
 - Submitting a claim.....15
- Claim List..... 17**
- Find a Serial Number 21**

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 manufacturer 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 a little easier.

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, and Upload receipts.

Log into Global Warranty

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

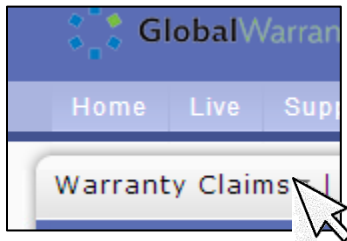
Your Login information is the same as Warranty Central. You can obtain the login information from your manufacturer if you have forgotten or do not have a login or password. The log-in for Global Warranty is case sensitive. Some accounts that were merged will have to be reset. Contact your manufacturer's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



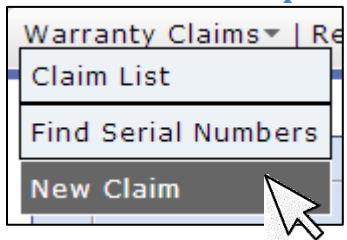
When you login to Global Warranty, you will first see the "Claim List". More on this latter.

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		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

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. Include alpha numeric characters if applicable. The model number will be displayed below the serial number at a minimum. The warranty days are now visible in the lower right corner. Fill out the necessary information on the claim summary tab. When you are complete, select save.

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

Warranty Claims | Report Generator | Master Accounts
User: NOR500495 Sponsor Code: NOR

Header

Sponsor Code: NOR Manufacturer Code: NOR - Nor-Lake Inc. Account Number: 500495 Service Agent: 3 WIRE GROUP SERVICE Location: MINNEAPOLIS, MN Labor Rate Code: RC00 00 00 Warranty Type: Select Currency Code: USD Currency Factor: 1.0000	Reference: <input type="text"/> Authorization Number: <input type="text"/> Created Date: <input type="text"/> Claim Status: <input type="text"/> Original Submitted Date: <input type="text"/> Submitted Date: <input type="text"/> Distributor Submitted Date: <input type="text"/> Approved Date: <input type="text"/> Paid Date: <input type="text"/>
--	--

<table style="width: 100%; border-collapse: collapse;"> <tr><td>Serial</td><td>R23S-15030004</td></tr> <tr><td>Model</td><td>R23-S-NDG</td></tr> <tr><td>Store Number</td><td><input type="text"/></td></tr> <tr><td>Name</td><td><input type="text"/></td></tr> <tr><td>Name2</td><td><input type="text"/></td></tr> <tr><td>Contact</td><td><input type="text"/></td></tr> <tr><td>Address</td><td><input type="text"/></td></tr> <tr><td>Address2</td><td><input type="text"/></td></tr> <tr><td>City</td><td><input type="text"/> *St. *Zip *</td></tr> <tr><td>Country</td><td>United States - US</td></tr> <tr><td>Latitude</td><td><input type="text"/></td></tr> <tr><td>Longitude</td><td><input type="text"/> Validate & GeoCode</td></tr> <tr><td>Territory</td><td><input type="text"/></td></tr> <tr><td>Telephone</td><td><input type="text"/></td></tr> </table>	Serial	R23S-15030004	Model	R23-S-NDG	Store Number	<input type="text"/>	Name	<input type="text"/>	Name2	<input type="text"/>	Contact	<input type="text"/>	Address	<input type="text"/>	Address2	<input type="text"/>	City	<input type="text"/> *St. *Zip *	Country	United States - US	Latitude	<input type="text"/>	Longitude	<input type="text"/> Validate & GeoCode	Territory	<input type="text"/>	Telephone	<input type="text"/>	<table style="width: 100%; border-collapse: collapse;"> <tr><td>WO#</td><td><input type="text"/></td></tr> <tr><td>Work Order Date</td><td><input type="text"/></td></tr> <tr><td>Requested By</td><td><input type="text"/></td></tr> <tr><td>Requested Date</td><td><input type="text"/></td></tr> <tr><td>Form Completed By</td><td><input type="text"/></td></tr> <tr><td>Work Completed Date</td><td><input type="text"/></td></tr> <tr><td>Customer Acceptance</td><td><input type="text"/></td></tr> <tr><td>Complaint Code</td><td>Select</td></tr> <tr><td>Action Code</td><td>Select</td></tr> <tr><td>Fault Code</td><td>Select</td></tr> <tr><td>Action</td><td><input type="text"/></td></tr> <tr><td>Installed Date</td><td>04/30/2015</td></tr> </table>	WO#	<input type="text"/>	Work Order Date	<input type="text"/>	Requested By	<input type="text"/>	Requested Date	<input type="text"/>	Form Completed By	<input type="text"/>	Work Completed Date	<input type="text"/>	Customer Acceptance	<input type="text"/>	Complaint Code	Select	Action Code	Select	Fault Code	Select	Action	<input type="text"/>	Installed Date	04/30/2015
Serial	R23S-15030004																																																				
Model	R23-S-NDG																																																				
Store Number	<input type="text"/>																																																				
Name	<input type="text"/>																																																				
Name2	<input type="text"/>																																																				
Contact	<input type="text"/>																																																				
Address	<input type="text"/>																																																				
Address2	<input type="text"/>																																																				
City	<input type="text"/> *St. *Zip *																																																				
Country	United States - US																																																				
Latitude	<input type="text"/>																																																				
Longitude	<input type="text"/> Validate & GeoCode																																																				
Territory	<input type="text"/>																																																				
Telephone	<input type="text"/>																																																				
WO#	<input type="text"/>																																																				
Work Order Date	<input type="text"/>																																																				
Requested By	<input type="text"/>																																																				
Requested Date	<input type="text"/>																																																				
Form Completed By	<input type="text"/>																																																				
Work Completed Date	<input type="text"/>																																																				
Customer Acceptance	<input type="text"/>																																																				
Complaint Code	Select																																																				
Action Code	Select																																																				
Fault Code	Select																																																				
Action	<input type="text"/>																																																				
Installed Date	04/30/2015																																																				

<table style="width: 100%; border-collapse: collapse;"> <tr><td>SA Dispatcher Name</td><td><input type="text"/></td></tr> <tr><td>SA Dispatcher Phone</td><td><input type="text"/></td></tr> <tr><td>Processed By</td><td><input type="text"/></td></tr> <tr><td>Authorized By</td><td><input type="text"/></td></tr> <tr><td>Invoice</td><td><input type="text"/></td></tr> <tr><td>Payment Type</td><td>--Select Type--</td></tr> <tr><td>Mfg. Credit#</td><td><input type="text"/></td></tr> <tr><td>WO Status</td><td><input type="text"/></td></tr> <tr><td>Claim Download</td><td><input type="checkbox"/></td></tr> <tr><td>Tax Code</td><td>Select</td></tr> <tr><td>Last Processed By (Mfg)</td><td><input type="text"/></td></tr> <tr><td>Last Processed On (Mfg)</td><td><input type="text"/></td></tr> <tr><td>Last Processed By (SA)</td><td><input type="text"/></td></tr> <tr><td>Last Processed On (SA)</td><td><input type="text"/></td></tr> <tr><td>Last Processed By (Dist)</td><td><input type="text"/></td></tr> <tr><td>Last Processed On (Dist)</td><td><input type="text"/></td></tr> </table>	SA Dispatcher Name	<input type="text"/>	SA Dispatcher Phone	<input type="text"/>	Processed By	<input type="text"/>	Authorized By	<input type="text"/>	Invoice	<input type="text"/>	Payment Type	--Select Type--	Mfg. Credit#	<input type="text"/>	WO Status	<input type="text"/>	Claim Download	<input type="checkbox"/>	Tax Code	Select	Last Processed By (Mfg)	<input type="text"/>	Last Processed On (Mfg)	<input type="text"/>	Last Processed By (SA)	<input type="text"/>	Last Processed On (SA)	<input type="text"/>	Last Processed By (Dist)	<input type="text"/>	Last Processed On (Dist)	<input type="text"/>	<table style="width: 100%; border-collapse: collapse;"> <tr><td>Extra Field1</td><td><input type="text"/></td></tr> <tr><td>Extra Field2</td><td><input type="text"/></td></tr> <tr><td>Compressor Warranty</td><td><input type="text"/></td></tr> <tr><td>WCID</td><td><input type="text"/></td></tr> </table>	Extra Field1	<input type="text"/>	Extra Field2	<input type="text"/>	Compressor Warranty	<input type="text"/>	WCID	<input type="text"/>
SA Dispatcher Name	<input type="text"/>																																								
SA Dispatcher Phone	<input type="text"/>																																								
Processed By	<input type="text"/>																																								
Authorized By	<input type="text"/>																																								
Invoice	<input type="text"/>																																								
Payment Type	--Select Type--																																								
Mfg. Credit#	<input type="text"/>																																								
WO Status	<input type="text"/>																																								
Claim Download	<input type="checkbox"/>																																								
Tax Code	Select																																								
Last Processed By (Mfg)	<input type="text"/>																																								
Last Processed On (Mfg)	<input type="text"/>																																								
Last Processed By (SA)	<input type="text"/>																																								
Last Processed On (SA)	<input type="text"/>																																								
Last Processed By (Dist)	<input type="text"/>																																								
Last Processed On (Dist)	<input type="text"/>																																								
Extra Field1	<input type="text"/>																																								
Extra Field2	<input type="text"/>																																								
Compressor Warranty	<input type="text"/>																																								
WCID	<input type="text"/>																																								

Warranty Days Left : 1026
Labor Warranty Days Left : 1026

Total

	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"/>

Confirmation

Warranty Claim Policy Review

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

The screenshot shows the 'Claim' summary screen in a software application. The 'Policy' button is located in the bottom right corner of the main data area and is highlighted with a red box. A red arrow points to this button. The screen displays various claim details such as 'Sponsor Code: NOR', 'Reference: 037437', 'Created Date: 07/28/2014 09:09 AM', and 'Claim Status: SUBMITMFG'. A navigation bar at the bottom includes tabs for 'Summary', '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 a 'Policies' pop-up window overlaid on the claim summary screen. The window title is 'Policies' and it contains the following text:

Welcome, and thank you for servicing this Nor-Lake unit. In the interest of good relations and customer communication, listed below are the Nor-Lake Warranty guidelines and service exclusions. Please review and if unclear or questions arise please contact our Nor-Lake Service Dept @ 800-388-5253. Thank you!

Labor and Travel: Nor-Lake 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 Nor-Lake covers standard reasonable service times.

Nor-Lake 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 'Currency Factor : 1.0000' and 'Paid Date' fields from the claim summary screen.

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

After you click the “Save” button 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 | Master Accounts | User: NOR500495 Sponsor Code: NOR

Header

Sponsor Code: NOR	Reference: 1068964	View Report
Manufacturer Code: NOR - Nor-Lake Inc.	Authorization Number: NOR1135	Send Email
Account Number: 500495	Created Date: 06/24/2015 02:13 PM	Policy
Service Agent: 3 WIRE GROUP SERVICE	Claim Status: STAGING	
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 | **Equipment** | Labor Details(0) | Parts(0) | Service Company | Activity(0) | File Room(0) | Audit(0) | Contacts | Po Info(0) | Complaint(0)

Summary

Serial: R23S-15030004	WO#: 589758	SA Dispatcher Name: Dispatcher Name	Extra Fields
Model: R23-S-NDG	Work Order Date: 06/24/2015	SA Dispatcher Phone: 312-568-9854	
Store Number:	Requested By: John McMillin	Processed By:	Extra Field1:
Name: US Foods Culinary Equipment & Supplies	Requested Date: 06/16/2015	Authorized By:	Extra Field2:
Name2:	Form Completed By: Deb	Invoice: 658978	Compressor Warranty:
Contact: Bill Green	Work Completed Date: 06/18/2015	Payment Type: --Select Type--	WCID:
Address: 8014 Industrial Blvd	Customer Acceptance: Bill Green	Mfg. Credit#:	
Address2:	Complaint Code: Select	WO Status:	
City: Breinigsville St. PA Zip 18031	Action Code: Select	Claim Download:	
Country: United States - US	Fault Code: Select	Tax Code: Select	
Latitude: 0.000000	Action: Installed new captube 75 inch of .040. Replaced captube and recharged system. upon departure unit was pulling down to	Last Processed By (Mfg):	
Longitude: 0.000000 Validate & GeoCode:	Installed Date: 04/30/2015	Last Processed On (Mfg):	
Territory:		Last Processed By (SA): NOR500495	
Telephone: (555) 555-5555		Last Processed On (SA): 06/24/2015 02:13 PM	
		Last Processed By (Dist):	
		Last Processed On (Dist):	

Complaint

Customer called in and reported reach in freezer not maintaining temperature.

Cause

Upon arrival found reach in cabinet at 37° and not dropping. Added taps to system to verify charge. Found low side at 3 PSI and high side at 175 PSI. Symptoms indicated restricted captube on system.

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"/>


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

Operations

Search Claim | Submit Claim | Edit

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.

Summary	Equipment	Labor Details()	Parts()
---------	-----------	------------------	----------

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

Labor Details(1) Parts(2) Service Company Activity(1) File Room(1) Audit(102) Contacts(0) Complaint(1)																												
Work Date	Hours	Type	App. Hours	Type	Hours	App Hours	Charge Rate	App Rate	Travel Hours	App. Travel Hours	Miles	App. Miles	Charge Amt															
<table border="1"> <tr> <td>Rate</td> <td></td> <td>=</td> <td></td> </tr> <tr> <td>2.00</td> <td></td> <td>=</td> <td></td> </tr> <tr> <td>0.50</td> <td></td> <td>=</td> <td></td> </tr> <tr> <td>20.00</td> <td></td> <td>=</td> <td></td> </tr> </table>												Rate		=		2.00		=		0.50		=		20.00		=		Technician Time Started <input type="text"/> Time C No of Trip <input type="text"/> Sub Agent <input type="text"/>
Rate		=																										
2.00		=																										
0.50		=																										
20.00		=																										
<input type="button" value="Add Labor Line"/> <input type="button" value="Edit"/>																												
Totals																												

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.

Labor Info X

Technician

Date

Time Started Time Completed

Zero Pricing Hold

	Actual	Approved
Hours Type	Regular <input type="button" value="v"/>	Regular <input type="button" value="v"/>
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

Operations

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

Item Number <input type="text"/>	Old Serial <input type="text"/>	Tag Number <input type="text"/>
Item Description <input type="text"/>	New Serial <input type="text"/>	Reference Number <input type="text"/>
Qty <input type="text"/>	Tracking Number <input type="text"/>	Invoice Number <input type="text"/>
Unit Price <input type="text"/>	RMA Number <input type="text"/>	Distributor Number <input type="text"/>
App. Price <input type="text"/>	RMA Required <input checked="" type="checkbox"/> RMA Qty. <input type="text"/>	
Extended Price <input type="text"/>	RMA Printed <input type="checkbox"/>	
Other <input type="checkbox"/>		

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

You can enter multiple different item lines.

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...

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. **Nor-Lake 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				
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	Old Serial		Tag Nur
Item Description	HOLDER,HEAT GUARD,4',E	New Serial		Reference Nur
Qty	1	Tracking Number		Invoice Nur
Unit Price	14.20	RMA Number	48786	Distributor Nur
App. Price	14.20	RMA Required	<input checked="" type="checkbox"/>	RMA Qty.
Extended Price	17.04	RMA Printed	<input type="checkbox"/>	
Other	<input type="checkbox"/>	<input type="button" value="Add Line Item"/>		

As an option, you can select the “Activity” tab. This is where you will see any notes returned from the manufacturer 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 Sponsor Code: AJA Manufacturer Code: AJA-AJANTUNES Account Number: 10000466 <input type="button" value="Send Email To SA"/> Service Agent: COMMERCIAL KITCHEN PARTS & SERVICE Location: COMMERCIAL KITCHEN PARTS & SERVICE Labor Rate Code: RC52 52 .52 Warranty Type: <small>Select</small> Currency Code: USD Currency Factor: 1.0000		Reference: 619936 <input type="button" value="View Report"/> Authorization Number: 1084 <input type="button" value="RMA Print"/> Created Date: 12/10/2013 08:02 AM <input type="button" value="Send Email"/> Claim Status: Staging <input type="button" value="Policy"/> Original Submitted Date: Submitted Date: Distributor Submitted Date: Approved Date: Paid Date:
--	--	---

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

Activity Code: Equipment Note ActCodes

Activity Date: 12/10/2013

Contact: TG

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

Save Cancel A

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.

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

Details

Type	Image Name	Created Date	Created User	Recent Comment
------	------------	--------------	--------------	----------------

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

Add Files

Select File		Browse...
Select File		Browse...
Select File		Browse...
Select File		Browse...
Select File		Browse...

Operations

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

Summary
Equipment
Labor Details()
Parts()

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

Total						
	Actual Amount	Approved Amount	Hold		Actual Amount	Approved Amount
Freight Amount	0.00	0.00	<input type="checkbox"/>	Other Charges	0.00	0.00
Expedited Freight Amount	0.00	0.00	<input type="checkbox"/>	Parts Total	415.73	415.73
Diagnostic Fee Amount	0.00	0.00	<input type="checkbox"/>	Labor Total	121.16	121.16
Shipping Amount	0.00	0.00	<input type="checkbox"/>	Tax Total	0.00	0.00
Travel Amount	0.00	0.00	<input type="checkbox"/>	Grand Total	536.89	536.89
				Rejected Amount	0.00	

Operations

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	✓

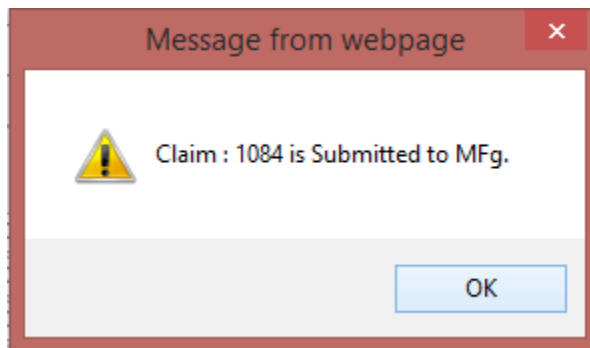
Totals

	Actual Amount	Approved Amount		Actual Amount	Approved Amount
Freight Amount	0.00	0.00	Other Charges	0.00	0.00
Expedited Freight 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

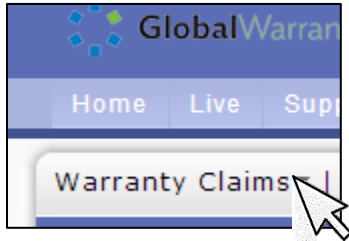
Operations


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

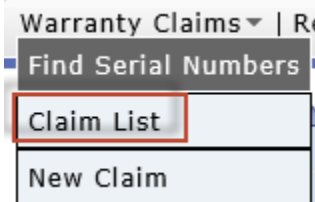


Claim List

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:

- a. Account Number
- b. Created Date
- c. Approved Date
- d. Authorized Date
- e. Claim Status (See further information below)
- f. Reference Number
- g. Authorization Number
- h. Invoice Number
- i. SO Number

Criteria

Manufacturer Code: NOR - Nor-Lake Int | 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

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

Total No. Of Records: 255

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.

06/23/2015 7:38:04 AM

[Home](#) | [Logoff](#) | [Contact Us](#)

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:

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	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

Home | About Us | Live | Support | Downloads |

©2014 DAVISWARE, Inc.

Version : 15.1.1(013) Release Date :06/22/2015

17

To view a claim select "View".

06/23/2015 7:38:04 AM
Home | [Logoff](#) | [Contact Us](#) |

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: 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	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

Home | About Us | Live | Support | Downloads |

©2014 DAVISWARE, Inc.

Version : 15.1.1(013) Release Date :06/22/2015

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:

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: St: Zip:

Country:

Latitude:

Longitude:

Territory:

Telephone:

WO#:

Work Order Date:

Requested By:

Requested Date:

Completed By:

Completed Date:

Customer Acceptance:

Complaint Code:

Component Code:

Cause Code:

Action Code:

Action:

Installed Date:

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):

Complaint

Unit is not rolling.

Warranty Days Left : 203

Labor Warranty Days Left : 203


18

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



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:

ked unit and found chains unaligned. Tried to align cain but couldn't
 ed 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

Other Charges : 0.00

Total (Section2) : 390.00

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

Serial Number of Major Component Alexis	Totals	
	Handling Allowance (Parts)	21.81
	Total(Section 3)	145.40
	Grand Total	557.21

 Name of Party Completing this Report Title

Print

General Options

Select Printer

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

Status: Ready Print to file Preferences

Location: Find Printer...

Page Range

All Selection Current Page

Pages: 1

Enter either a single page number or a single page range. For example, 5-12

Number of copies: 1 Collate

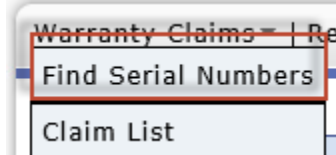
Print Cancel Apply

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 manufacturer service department.