



Infor LN Service User Guide for Claim Management

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Publication Information

Document code	tscmmug (U9798)
Release	10.4 (10.4)
Publication date	June 20, 2022

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About this document

This guide provides information about the various concepts and processes such as warranty, warranty handling and linking warranties, available in Claim Management.

Objectives

This document is designed to meet the objectives described below. It is assumed that you already have a understanding of LN Service

- **Understand the following concepts**
 - Customer Claim
 - Supplier Claim
- **To perform the following tasks**
 - Customer Claim Process
 - Supplier Claim Process
 - Generating Supplier Claim from Different Origins

Document summary

This user's guide explains the various concepts and process available in the Claim Management module.

How to read this document

This document is assembled from online Help topics. As a result, references to other sections in the manual are presented as shown in the following example:

For details, refer to LN Service Online Help.

Please refer to the Table of Contents to locate the referred section.

Underlined terms indicate a link to a glossary definition. If you view this document online and you click on underlined text, you jump to the glossary definition at the end of this document.

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Chapter 1

Introduction

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Claim Management allows you to register, review and process customer and supplier claims. Claim Management ensures that claims, resulting from variances due to cost or schedule, against the business partner can be prepared and submitted as part of project management. A claim can be based on documents such as invoices, service orders, maintenance sales orders, sales orders and even a sales schedule.

You can register, review and process claims received from customers. A claim can be based on documents such as invoices, service orders, maintenance sales orders, sales orders or a sales schedule. You can manually register a claim or copy a claim from the original document or from a call. After a claim is registered and submitted, you can approve, reject, or cancel the claim.

Customer claim process

You can register, review and process claims received from customers. A claim can be based on documents such as invoices, service orders, maintenance sales orders and sales orders. The claim can be registered manually, copied from an original document or from a call. After a claim is registered and submitted you can (partially) approve, reject or cancel the claim.

Register customer claim

On the Claim Header you can specify whether the claim is settled by a credit note (sent to the customer) or by an invoice (received from the customer). To do so select the required option in the **Claim Invoice Procedure** field in the Customer Claim (tscmm1600m000) session.

You can specify whether the claim line is reimbursed in cash (based on the approved amount on the claim line) or materials (based on item and quantity specified on the claim line). To do so select the **Reimburse Materials** or **Reimburse Costs** option in the **Claim Method** field on the Claim Line in Customer Claim Lines (tscmm1110m000) session,

A customer claim can be created:

- **Manually** : You can specify the values of the claim header and the claim lines manually.
- **From an original document** : You can register a claim based on the documents such as invoices, service order, maintenance sales orders, sales orders or a sales schedule. The original document information is specified on the claim header in the Customer Claims (tscmm1100m000) session. You can copy the data from the original document using the **Copy from Sales Document** option in the Action menu. The original items, quantities and sales amounts are copied to the claim.
- **From a Call** : You can register a claim from a customer call. The transaction text from the call is copied to the claim internal text and the call is transferred to a customer claim.

Note

The claim header is generated by a call or created manually. In both methods it is possible to generate the claim lines based on an original document.

Submit customer claim

You must submit the claim after registration. When the claim is submitted, the header-status of the claim is set to **Pending Approval**. The claim lines can now be **Approved**, **Rejected**, **Modified**, or **Canceled**.

Note

In some cases, the **Line Status** first becomes **Pending Approval Estimates**, **Pending Material Return**, **Pending Supplier Approval**, before the line becomes **Pending Approval**.

Approve the estimates

When the claim is submitted and the **Use Estimates** field is checked in the Customer Claim Lines (tscmm1110m000) session, the claim **Line Status** is updated to **Pending Approval Estimates**. It is mandatory to approve the estimates before you approve the claim. If the estimates are not approved, the **Approved Quantity** and the **Approved Amount** in the Customer Claim Lines (tscmm1110m000) session cannot be modified.

Note

If this field is unchecked, the claim **Line Status** is updated to **Pending Material Return** (in case **Return Material Required** checkbox is selected in Customer Claim Lines (tscmm1110m000) session) or **Pending Approval**.

Receive and return defective part from Customer

If the material must be returned by the customer before approving the claim, you must select the **Return Material Required** check box in the Customer Claim Lines (tscmm1110m000) session and a **Line** is created in Customer Claim Receipts (tscmm1113m000) session. When the claim is submitted, a warehouse order is created and the claim status is set to **Pending Material Return**. A warehouse order is created that is used to receive the item in customer owned inventory.

When the item is received, a warehouse order is created to deliver the defective part to the Service Department. The part must be delivered to the service department, before the claim can be **Approved** or **Rejected**.

An inspection is performed on the defective part at the Service Department. An inspection is created automatically if the measurement type is specified at the time of delivery to the Service Department. You can add more inspections manually. All inspections must be completed or rejected before the Claim is approved.

Action for Item - You can use the **Approval Action** field and **Rejection Action** field in the Customer Claim Lines (tscmm1110m000) session to indicate the status of the items received from the customer:

- **Make Company Owned:** The item is sent back to the warehouse as company owned.

- **Return to Customer:** The item is sent back to the warehouse as customer owned. When the item is returned to the warehouse, a new warehouse order is created to send the item back to the customer.
- **Scrap:** The item is not sent back to the warehouse and can be scrapped.

Return to customer

If the item is returned to the customer, a claim delivery line is created in the Customer Claim Deliveries (tscmm1112m000) session. The **Material Type** field is set to **Return Material** to indicate that the delivery line is used to return the claim item to the customer.

Terminate the warehouse receipt of the defective part

You can terminate the receipts on the claim line, if the status of the claim is **Pending Material Return** and the defective part(s) are not received (completely). Open warehouse order inbound lines are deleted.

Approve the claim

You can approve the claim header or individual claim lines. After a claim line is approved, the claim line status is set to **Approved**. If all the lines (approved or rejected) are processed, the header status is set to **Approved**. If one or more lines are rejected, the **Partially Approved** field is checked on the header in the Customer Claims (tscmm1100m000) session.

If the **Print RMA Required** field is set to **To be Printed** in the Customer Claim Receipts (tscmm1113m000) session, a RMA (return material authorization) document is printed.

If the **Print RMA Required** checkbox is selected on the service type, the RMA is printed as part of the approval step.

If the **Customer Claim Inspection Required** check box is selected in the Customer Claim Lines (tscmm1110m000) session, LN creates and processes a service inspection before the claim can be **Approved** or **Rejected**.

If the **Material Type** field is set to **Reimburse Material** in the Customer Claim Deliveries (tscmm1112m000) session, a delivery line (with a warehouse order linked to it) is created, to send new material to the customer.

Based on the option selected for the **Tagged To** field in the Customer Claim Lines (tscmm1110m000) session, the approved claim amounts are registered as claim costs on the serialized item warranty, with the status Active, for the installation on the customer claim header. When the **Tagged To** field is set to contract, an additional record is created in the Contract Cost Coverage - Overview (tsctm4580m000) session.

Receive invoice

When the claim is approved and the **Claim Invoice Procedure** field is set to **Invoice Based** in the Customer Claims (tscmm1100m000) session , an invoice must be received from the customer. The user must select the “Approve for invoice linking” option on the specific menu. The claim line status is changed

to “Approved for invoice linking”. The invoice received in the Accounts Payable can now be linked to the claim line.

Credit note

When the claim is approved and the **Claim Invoice Procedure** field is set to **Credit Note Based** in the Customer Claims (tscmm1100m000) session, a credit note sales invoice is created in Invoicing.

Reimburse material

When the claim is approved and the **Claim Method** field is set to **Reimburse Materials** in Customer Claim Approval (tscmm1110m100) session, a **Line** is created in Customer Claim Deliveries (tscmm1112m000) session. New material is issued for reimbursement to the customer. The warehouse order for this delivery line is created, when the claim is approved. If the **Inventory Commitments Required** checkbox is selected in the Claim Management Parameters (tscmm0100m000) session, the inventory commitments are updated when the warehouse order is created.

Claim line is settled

After the claim is approved, the claim line-status is updated to “settled” only when:

In case of **Claim Method** set to **Reimburse Costs** in Customer Claim Approval (tscmm1110m100) session :

- If the **Claim Invoice Procedure** field is set to **Invoice Based** and the **Claim Method** of the line is **Reimburse Costs**, then purchase invoice lines can be linked to the claim line using a ledger account with the customer claim integration set. You can set the status of the claim line manually to **Settled** if one linked invoice line is present which has the **Final Invoice** check box selected in the Customer Claim Invoice Lines (tscmm1115m000) session. Additionally, the related cost purchase invoices must be finalized in the General Ledger and the related purchase invoices related to orders must be approved in Accounts Payable.
- The invoice is created in SLI when the **Claim Invoice Procedure** field is set to **Credit Note Based** in Customer Claim Invoice Lines (tscmm1115m000) session, and SLI has created the sales credit note. SLI triggers the creation of the customer claim invoice line in Customer Claim Invoice Lines (tscmm1115m000) session and automatically set the status to **Settled**.

In case of **Claim Method** set to **Reimburse Materials** in Customer Claim Approval (tscmm1110m100) session :

- The status of the related material line in warehousing is set to Confirm shipment.
- The related material line is terminated.

Customer claim rejection

The user can reject the claim using the Reject customer claim option on the claim line or claim header in the Customer Claims (tscmm1100m000) session. The user have to specify the reason for rejecting the claim and can optionally fill the rejection text. If the **Return Material Required** checkbox is selected

in the Customer Claim Lines (tscmm1110m000) session, a warehouse-delivery is created, to send the received item back to the customer.

Cancel customer claim

You can cancel the claim only when:

The claim header status is **Modified** or **Pending Approval** and:

- The **Claim Method** field is set to **Reimburse Costs** in the Customer Claim Lines (tscmm1110m000) session.
- ■ The **Claim Invoice Procedure** is set to **Credit Note Based** in the Customer Claims (tscmm1100m000) session, and the related invoice line is not finalized in Financials, Or
- ■ The **Claim Invoice Procedure** is set to **Invoice Based** in the Customer Claims (tscmm1100m000) session, and the related line can be deleted in Financials.
- The **Claim Method** field is set to **Reimburse Materials** in the Customer Claim Lines (tscmm1110m000) session.
- ■ The related Warehouse order line(s) and Planned Inventory Transactions can still be modified in Warehousing.

Close and delete customer claim

A customer claim is closed when:

- The header-status of the customer claim is **Approved**, **Rejected** or **Canceled**.
- The line-status of all the customer claim lines is **Settled**, **Rejected** or **Canceled**.
- All the delivery and receipt lines of the customer claim are final (no open orders exist for the customer claim).

When a customer claim is closed the header-status of the customer claim is set to Closed. When a Customer Claim is closed the line-status of the Customer Claim lines is not changed.

After a customer claim is closed, the option is available to post the claim to history, but only when the parameter **Use Claim History** is selected in the Claim Management Parameters (tscmm0100m000) session.

Finally the option is available to delete the closed customer claim(s) . When a customer claim is deleted the customer claim header and all its lines are deleted. If parameter **Use Claim History** is selected in the Claim Management Parameters (tscmm0100m000) session, deleting can only be done after the claim has been posted to history.

You can register, review and process supplier claims from a customer claim, service order, maintenance sales order. A claim can be based on documents such as invoices, service orders, purchase order or a purchase schedule. You can manually register a claim or copy a claim from the original document. After a claim is registered and submitted, you can approve, reject, or cancel the claim.

Supplier claim process

You can register, review and process supplier claims. A claim can be based on documents such as invoices, service orders, purchase orders and even purchase schedules. The claim lines can be registered manually or copied from another document. After a claim is registered and submitted you can approve, reject or cancel the claim.

Register supplier claim

On the Claim Header you can specify whether the claim will be settled by a credit note (received from the supplier) or by an invoice (sent to the supplier), by selecting the required option in the **Claim Invoice Procedure** field in the Supplier Claim (tscmm2600m000) session.

You can specify whether the claim line should be settled by reimbursing costs (based on the approved amount on the claim line) or materials (based on item(s) and quantity specified on the claim line(s)). To do so select the **Reimburse Materials** or **Reimburse Costs** option in the **Claim Method** field on the Claim Line in Supplier Claim Lines (tscmm2110m000) session.

A supplier claim can be created:

- **Manually** : You can specify the values of the claim header and the claim lines manually.
- **From customer claim** : You can transfer a customer claim (line) to generate a supplier claim (line). For more information refer to *Creating supplier claim request from customer claims* (p. 23).
- **From a purchase document** : You can register a claim based on the documents such as invoices, service order, purchase order or a purchase schedule. The purchase document information is specified on the claim header in the Supplier Claim (tscmm2600m000) session.

Alternatively, you can also copy the data from the purchase document using the **Copy from Purchase Document** option from the Actions menu.

- From Service Order Line (Material, Labour or Other Cost): When you execute a service order, one or more cost lines can be the result of defective item(s) purchased from one or more suppliers. These lines can be selected and can be transferred to the Supplier Claim Requests (tscmm1114m000) session to generate the supplier claim. For more information refer to *Creating supplier claim requests from service order cost lines/maintenance sales coverage lines* (p. 19)
- From Maintenance Sales Order Coverage Lines: When you execute a maintenance sales order, one or more cost lines can be the result of defective item(s) purchased from one or more suppliers. These lines can be selected and can be transferred to the Supplier Claim Requests (tscmm1114m000) session to generate the supplier claim. For more information refer to *Creating supplier claim requests from service order cost lines/maintenance sales coverage lines* (p. 19)

Note

You can register a supplier claim manually and based on purchase reference document. The header is created manually and the lines are copied from a purchase reference document.

Submit supplier claim

You must submit the claim after registration. When the claim is submitted, the header-status of the claim is set to **Pending Approval**. The claim lines can now be **Approved**, **Rejected**, **Modified**, or **Canceled**.

Note

In some cases, the **Line Status** first becomes **Pending Approval Estimates**, or **Pending Material Return** before the status becomes **Pending Approval**.

Approve the estimates

When the claim is submitted and the **Use Estimates** field is checked in the Supplier Claim Lines (tscmm2110m000) session, an estimate line is created and the claim line status is updated to **Pending Approval Estimates**. It is mandatory to approve the estimates before you approve the claim. If the estimates are not approved, the **Approved Quantity** and **Approved Amount** in Supplier Claim Lines (tscmm2110m000) session cannot be modified.

Note

If this field is unchecked, the estimate line is deleted and the claim status is updated to **Pending Approval**.

Ship defective parts to supplier

If the material must be returned to the supplier before approving the claim, you must select the **Return Material Required** check box in the Supplier Claim Lines (tscmm2110m000) session and a supplier claim delivery line is created in the Supplier Claim Deliveries (tscmm2112m000) session. When the

claim is submitted a warehouse order is created and the claim **Line Status** is updated to **Pending Material Return**.

If the **Receive RMA** field is set to **To be Received** in the Supplier Claim Deliveries (tscmm2112m000) session, an RMA (return material authorization) document is printed. However, you must first receive the RMA before the items are shipped. Use the **RMA Received** option from the Action menu or the **RMA Received** button in the Supplier Claim Deliveries (tscmm2112m000) session or the Supplier Claim Lines (tscmm2110m000) session; to receive the RMA.

Action for Item - You can use the **Approval Action** field (for approved material) and **Rejection Action** field (for rejected material) in the Supplier Claim Lines (tscmm2110m000) session to determine how the supplier must handle the returned defective material. The supplier can **Keep and Take Ownership**, **Return to Customer** or **Scrap** the item. When the defective item is returned by the supplier, a supplier claim receipt line is created.

Terminate the warehouse delivery line of the defective materials

When a warehouse order for a Supplier Claim Deliveries (tscmm2112m000) session is created, but not all the items can be delivered for some reason, the warehouse order for the remaining items can be terminated to be able to process the Supplier Claim without sending all the defective material.

Terminate a warehouse receipt line of the reimbursed materials

When a warehouse order for a Supplier Claim Receipts (tscmm2113m000) is created, but not all the items are received for some reason the warehouse order for the remaining items can be terminated to be able to process the Supplier Claim without receiving all the items.

Approve the claim

You can approve the claim header or individual claim lines. When a claim line is approved, the claim line status is set to **Approved**. If all the lines are processed (approved or rejected), the header status is set to **Approved**. If one or more lines are rejected, the **Partially Approved** field is checked on the header in the Supplier Claims (tscmm2100m000) session.

If the **Claim Method** field is set to **Reimburse Materials** in the Supplier Claim Lines (tscmm2110m000) session, a warehouse order is created, to receive the replacement material from the supplier.

Note

Customer claim lines with **Claim Method** field set to **Reimburse Materials** can also be transferred to supplier claim (lines).

Based on the option selected for the **Tagged To** field in the Supplier Claim Lines (tscmm2110m000) session, the approved claim amounts are registered as claim revenue on the serialized item's supplier warranty, with the status Active, for the installation on the supplier claim header.

Send invoice

When the claim is approved and the **Claim Invoice Procedure** field is set to **Invoice Based** in the Supplier Claims (tscmm2100m000) session, an invoice must be sent to the supplier.

Credit note

When the claim is approved and the **Claim Invoice Procedure** field is set to **Credit Note Based** in the Supplier Claims (tscmm2100m000) session, a credit note invoice must be received from the supplier. The credit note can be linked to the claim lines after the credit not is received in Accounts Payable,

Claim line is settled

After the claim is approved, the claim line-status is updated to “settled” only when:

- If the **Claim Invoice Procedure** is set to **Credit Note Based** and the **Claim Method** of the line is **Reimburse Costs** in Supplier Claim Lines (tscmm2110m000) session , then purchase credit note lines can be linked to the claim line using a ledger account with the supplier claim integration set. You can set the status of the claim line manually to **Settled** if at least one linked credit note line is present which has the **Final Invoice** checkbox selected in the Supplier Claim Invoice Lines (tscmm2115m000) session. Additionally, the related cost purchase credit notes must be finalized in the General Ledger and the related purchase credit notes related to orders must be approved in Accounts Payable
- If the **Claim Invoice Procedure** field is set to **Invoice Based** in the Supplier Claim Invoice Lines (tscmm2115m000) session, SLI triggers the creation of the supplier claim invoice line in Supplier Claim Invoice Lines (tscmm2115m000) session and automatically set the status to **Settled**.

Supplier claim rejection

The user can register the rejection of the claim using the Reject Supplier Claim option on the claim line or claim header in the Supplier Claims (tscmm2100m000) session. The user have to specify a reason for rejecting the claim. The option is available to add extra information in the Rejection Text. If the **Return Material Required** checkbox is selected in Supplier Claim Lines (tscmm2110m000) session, a warehouse-delivery is created, to receive the claimed item back from the supplier.

Cancel supplier claim

You can cancel the claim but not the individual claim lines; the status of all the claim lines is set to **Canceled**.

You can cancel the claim only when the claim header **Status** is **Modified** or **Pending Approval** and no claim line exists with status set to **Approved** or **Settled**.

Close and delete supplier claim

A supplier claim is closed when:

- The header-status of the supplier claim is **Approved**, **Rejected** or **Canceled**.
- The line-status of all the supplier claim lines is **Settled**, **Rejected** or **Canceled**.
- All the delivery and receipt lines of the supplier claim are final (no open orders exist for the supplier claim).

Note

When a supplier claim is closed the header-status of the supplier claim is set to **Closed**. When a supplier claim is closed the line-status of the supplier claim lines is not changed.

After a supplier claim is closed, the option is available to post the claim to history but only when the claim parameter **Use Claim History** is selected in the Claim Management Parameters (tscmm0100m000) session.

Finally the option is available to delete the closed Supplier Claim(s) . When a Supplier Claim is deleted the supplier claim header and all its lines are deleted If parameter **Use Claim History** checkbox is selected in the Claim Management Parameters (tscmm0100m000) session, deleting can only be done after the claim has been posted to history. A supplier claim can only be deleted after all the financial reconciliation data is accepted.

Creating supplier claim requests from service order cost lines/maintenance sales coverage lines

You can create supplier claim requests from service order material lines, labor lines, other cost lines or maintenance sales coverage lines. The lines are transferred to the Supplier Claim Requests (tscmm1114m000) session using the **Transfer to Supplier Claim** option from the Action menu in these sessions.

LN populates the data in the Supplier Claim Requests (tscmm1114m000) session, based on the value, the **Origin** field is set to.

From Service Order (tssoc2100m100) session

You can transfer all the actual cost lines (linked to the service order); to the Supplier Claim Requests (tscmm1114m000) session. LN populates the data in the Supplier Claim Requests (tscmm1114m000) session and the **Origin** field is set to **Service Order**.

Note

You can also transfer all actual cost lines linked to the activity simultaneously from the Service Order Activity (tssoc2110m100) session using the **Transfer to Supplier Claim** option from the Action menu.

It is possible to modify the Supplier Claim request data in the Supplier Claim Requests (tscmm1114m000) session and also to delete the Supplier Claim Request,

From Service Order Actual Material Costs (tssoc2121m000) session

You can transfer the actual material cost lines from the Service Order Actual Material Costs (tssoc2121m000) session to the Supplier Claim Requests (tscmm1114m000) session, only if the following criteria is met:

- No open supplier claim line must exist for service order material line.
- When you transfer the service order cost lines, the **Delivery Type** field must be set to one of the following values:
 - **From Warehouse**
 - **From Warehouse in Car**
 - **From Warehouse by Transport**
 - **From Service Kit**
 - **From Service Inventory**
 - **By Purchase Order**
 - **By Field Purchase**
 - **Supplier Direct Delivery**

When the actual material cost lines is transferred, the following values are defaulted from the Service Order Actual Material Costs (tssoc2121m000) session:

- **Buy-from BP**
- **CumulativeQuantity**
- **Sales Quantity Unit**
- **Total CostAmount**

Note

The option **Transfer to Supplier Claim** is enabled only if the service order line status is set to **Costed** or **Posted to Finance**.

If the service order material line is a return line (To Warehouse), the amount for the line is negative and therefore, must not be transferred to a supplier claim.

From Service Order Actual Labor Costs (tssoc2131m000) session

When an actual labor cost line is transferred from the Service Order Actual Labor Costs (tssoc2131m000) session to the Supplier Claim Requests (tscmm1114m000) session; the following values are defaulted :

- **Time Quantity**
- **Total Cost Amount**
- **Time Quantity Unit**

Note

The option **Transfer to Supplier Claim** is enabled only if the service order line status is set to **Costed** or **Posted to Finance**.

From Service Order Actual Other Costs (tsoc2141m000) session

When an actual other cost line is transferred from the Service Order Actual Other Costs (tsoc2141m000) session to the Supplier Claim Requests (tscmm1114m000) session; the following values are defaulted:

- **Quantity**
- **Total CostAmount**
- **Time Quantity Unit**

Note

The option **Transfer to Supplier Claim** is enabled only if the service order line status is set to **Costed** or **Posted to Finance**.

From Coverage Lines (tsmsc1120m000) session

When you transfer the coverage lines to the Supplier Claim Requests (tscmm1114m000) session, LN populates the data in the Supplier Claim Requests (tscmm1114m000) session and the **Origin** field is set to **Maintenance Sales Order**.

When the coverage line is transferred, the following values are defaulted from the Coverage Lines (tsmsc1120m000) session:

- **Total CostAmount**
- **Serial Number**
- **Item**
- **Cost Component**
- **Consumed Quantity**
- **Time Quantity Unit**

You can transfer the coverage line only if the **Cost Type** field is not set to **Uptime** or **Quotation Invoice** in the Coverage Lines (tsmsc1120m000) session. You can generate a supplier claim request line if the cost amount of the coverage line is negative or zero, but LN generates a warning message. However, before generating the Actual Supplier Claim, the quantity and amount must be modified manually to a value greater than zero, in the Supplier Claim Requests (tscmm1114m000) session, before you can generate the actual Supplier Claim lines.

Note

- The option **Transfer to Supplier Claim** is enabled only if the Coverage Lines (tsmsc1120m000) **Status** is set to **Costed** or **Posted to Finance**.

Generating supplier claim

The Generate Supplier Claim (tscmm1260m000) session is used for the generation of supplier claims.

A supplier claim can be generated for supplier claim requests that have the **Buy-from Business Partner** and the **Service Type** specified in the Supplier Claim Requests (tscmm1114m000) session.

Supplier claim request can be created from:

- The customer claim line, setting the field **Generate Supplier Claim** to **To Be Generated**.
- A Service Order Material Line, Labor Line or other Cost Line or from a Maintenance Sales Coverage Line using the **Transfer to Supplier Claim** option from the Action menu.

Grouping Supplier Claim Requests

In the Generate Supplier Claim (tscmm1260m000) session, you can group supplier claim requests to one supplier claim:

- If the **Group** checkbox is selected, LN sets the **Group by Buy-from Business Partner** and **Group by Service Type** fields to checked. LN searches for the most recent claim header with the same **Buy-from BP** and Service Type.
 - If the **Group by Origin** check box is selected, LN generates a claim line for each of the supplier claim request and links these lines to the latest Supplier Claim header with the same origin. For Example: If the **Group by Origin** check box is selected, the supplier claim requests originating from a customer claim is not grouped with the supplier claim requests originating from a service order. In case a Supplier Claim header with the same origin does not exist, LN generates a new header (with the same origin).
- If the **Group by Purchase Reference** check box is selected, LN generates a claim line for each of the supplier claim request lines and links these lines to the most recent Supplier Claim header with the same Purchase Reference.
- If the **Group by Installation** check box is selected, LN generates a claim line for each of the supplier claim requests and links this lines to the claim header (with the same installation, installation group, main item and main serial). If the **Group by Installation** check box is selected, you have to select at least one of the **Group by Installation Group**, **Group by Item** and, **Group by Serial** check boxes.
- If the **Group by Installation Group** check box is selected, LN generates a claim line for each of the supplier claim request lines and links these lines to the most recent Supplier claim header (with the same Installation Group).
- If the **Group by Item** check box is selected, LN generates a Supplier claim line for each of the supplier claim requests and links these lines to the most recent Supplier Claim header (with the same Item).
- If apart from the **Group by Item** checkbox the **Group by Serial** check box is also selected, LN generates a Supplier Claim line for each of the supplier claim requests and links these lines to the most recent Supplier Claim header (with the same the same item and serial).

If the **Copy Internal Text** and **Copy External Text** check boxes in the Generate Supplier Claim (tscmm1260m000) session are selected, the relevant text is copied from the origin order to the supplier claim on the header as well as line level.

Creating supplier claim request from customer claims

You can generate a supplier claim request from a customer claim. If the **Generate Supplier Claim** field is set to **To Be Generated** and the record is saved in the Customer Claim Lines (tscmm1110m000) session, a record is created in the Supplier Claim Requests (tscmm1114m000) session.

There are two possible ways to generate a supplier claim depending on the **Wait on Supplier Claim Approval** checkbox:

- If the **Wait on Supplier Claim Approval** checkbox is selected in the Supplier Claim Requests (tscmm1114m000) session, the approval of the supplier claim line to be generated is mandatory for the approval of the customer claim line that it is generated from. LN allows to approve the customer claim Line only after the supplier claim is approved.
- If the **Wait on Supplier Claim Approval** checkbox is not selected, the supplier claim can only be generated after the customer claim line is approved. The approval of the customer claim is not affected with the outcome of the supplier claim.

If the **Generate Supplier Claim** field is set to **To Be Generated** in the Customer Claim Lines (tscmm1110m000) session, after the Customer Claim **Line Status** is set to **Approved**, the **Wait on Supplier Claim Approval** checkbox in the Supplier Claim Requests (tscmm1114m000) session is disabled because the Customer Claim has already been approved.

If the **Return Material Required** checkbox is selected in the Customer Claim Lines (tscmm1110m000) session, but not all items are received, a question is asked to verify whether it is ok to generate the supplier claim anyway.

You can group supplier claim requests to one supplier claim, based on the grouping functionality in the Generate Supplier Claim (tscmm1260m000) session. For more information, refer to the Grouping Supplier Claim Requests section in *Generating supplier claim* (p. 22).

You can generate the actual supplier claim using the **Generate Supplier Claim** option in the Supplier Claim Requests (tscmm1114m000) session or from the Customer Claim Header in Customer Claim (tscmm1600m000) session.

In case Supplier Claim is started from Supplier Claim Requests (tscmm1114m000) session, it can only be executed for the marked line(s).

If started from Customer Claim (tscmm1600m000) session, all the lines of the claim are checked and all the lines that are set to **To Be Generated** are processed, if all conditions for generating a Supplier Claim have been met for that particular line.

After the claim is generated the **Generate Supplier Claim** field is set to **Generated**. You cannot modify the data in the Supplier Claim Requests (tscmm1114m000) session after the supplier claim is generated.

If you delete the supplier claim, the field Generate Supplier Claim is set To Be Generated again and LN allows you to modify the data in the Supplier Claim Requests (tscmm1114m000) session.