



Infor LN Service User Guide for Warranties

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About this document

This guide provides information about the various concepts and processes such as customer claim, supplier claim and generating supplier claim, available for the Warranty functionality.

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

- Warranty
- Warranty Handling

To perform the following tasks

- Defining generic/serialized warranty
- Linking the warranties to Service Order/ Maintenance Sales Orders/Customer Claims

Document summary

This user's guide explains the various concepts and process available for the Warranty functionality.

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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Warranties

Warranty and warranty templates

A warranty is a guarantee that a component is repaired free of charge or at reduced costs if the component does not work according to the agreed specifications, within the specified period.

A warranty can be created in the Warranty Templates (tsctm0120m000) session. You can also define the warranty terms in this session.

In the Warranty Templates (tsctm0120m000) details session, you can define the following:

- Terms effectivity
- Warranty type
- Currency
- Template validity

You can link the warranty to:

- A service item in the Items - Service (tsmdm2100m000) session.
- A serialized item in the Serialized Items (tscfg2100m000) session.
- A default item data in the Items - Service Defaults (tsmdm2105m000) session.

Serialized item warranty

A warranty becomes active when it is linked to a serialized item and the delivery date or operational date of the serialized item is specified. The duration of the warranty can be modified. The warranty type, the operational date, or the delivery date determines the start date of the warranty. The warranty term with the longest validity duration determines the expiry date of the serialized item's warranty.

You can define coverage terms for the warranty by selecting the **Coverage Terms** option from the Coverage Terms menu. In the Warranty Coverage Terms (tsctm1120m500) session, you can define:

- Coverage type
- Term type
- Cost-covering method

- Term phasing data
- Cost and sales amounts (for serialized items only)

If you link a warranty to a (top) serialized item, the above-mentioned terms also apply to the (top) serialized item and the serialized items in the physical breakdown. The warranty terms of the (top) serialized item can be customized.

To customize a serialized item's warranty terms

1. In the Serialized Items (tscfg2100m000) session, select the appropriate serialized item line.
2. On the **Coverage** tab, click the button next to the **Template** field to access the Warranty Coverage Terms (tsctm1120m500) session. You can add, change, or delete warranty terms in this session.

Generic warranty

You can maintain generic warranty in the Generic Warranties (tsctm5100m000) session. When you create a new generic warranty using the warranty template, the coverage and cost terms specified in the template are copied to the generic warranty.

You can link a generic warranty to:

- A default item data in the Items - Service Defaults (tsmdm2105m000) session.
- A service item in the Items - Service (tsmdm2100m000) session.
- A service type in the Service Types (tsmdm0130m000) session.
- A serialized item in the Serialized Items (tscfg2100m000) session.
- A service order in the Service Orders (ts soc2100m000) session.
- A call in the Call (tsclm1100m000) session.
- A maintenance sales order in the Maintenance Sales Orders (tsmsc1100m000) session.
- A maintenance sales quotation in the Maintenance Sales Quotations (tsepp1100m000) session.

You can link a generic warranty to service order/maintenance sales order cost lines. You can use the warranty templates to generate the coverage terms. You can define the generic warranty or the warranty template applicable to the serialized item in the Items - Service (tsmdm2100m000) data. LN defaults the warranty either from the Service Types (tsmdm0130m000) or from the Serialized Items (tscfg2100m000) session.

Note

- In case warranty coverage allocations are defined on the coverage terms, you cannot change the warranty template in the Generic Warranties (tsctm5100m000) session.

Warranty handling on service order/activity/maintenance sales order

The cost lines linked to a service order activity or maintenance part lines can be covered by warranty. The warranty can be a serialized item control warranty or generic warranty. The warranty that is applied to the service order activity can be of type **Serialized Item Warranty** or **Warranty**.

Generic warranty

The generic warranty can be defined for anonymous and serialized items or on service type, service order activities, maintenance part lines, customer claims, calls, call invoices, and maintenance sales quotation lines.

If, for the Service Order Activities (tssoc2110m000) or Part Lines (tsmsc1110m000), the serialized item is not defined, the **Warranty** is defaulted from the Service Types (tsmdm0130m000) session. The **Warranty Type** field is set to **Generic Warranty** in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session.

Note

- If the **Force Generic Warranty** check box is selected in the Service Types (tsmdm0130m000) session, you must define **Generic Warranty** in the Service Types (tsmdm0130m000) session. The **Warranty Type** field is set to **Generic Warranty** in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session and the generic warranty of the service type is defaulted.
- If the **Coverage Time** defined in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session is not within the **Effective Date** and the **Expiry Date** of the **Generic Warranty** defined in Generic Warranties (tsctm5100m000) session, the **Warranty Type** field is set to **Generic Warranty**, but the defaulted **Warranty** from the Service Types (tsmdm0130m000) session is cleared.

Serialized warranty

For the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) sessions, the serialized warranty defined for the serialized item in the Serialized Items (tscfg2100m000) session is used by LN. The following are the possible scenarios:

- LN sets the **Warranty Type** field to **Serialized Item Warranty**, if the **Serialized Item Warranty Terms** check box is selected and the **Template** field is specified in the Serialized Items (tscfg2100m000) session. The **Warranty Type** is set to **No Warranty** when the warranty terms are expired and no Generic Warranty is applicable.
- LN sets the **Warranty Type** field to **Generic Warranty**, if the **Serialized Item Warranty Terms** check box is not selected and the **Generic Warranty** field is specified in the Serialized Items (tscfg2100m000) session. The **Warranty Type** is set to **No Warranty** when the warranty terms are expired.

Note

- If the **Force Generic Warranty** check box is selected in the Service Types (tsmdm0130m000) session, you must define **Generic Warranty** in the Service Types (tsmdm0130m000) session. The **Warranty Type** field is set to **Generic Warranty** in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session and the generic warranty of the service type is defaulted.
- If the **Coverage Time** defined in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session is not within the **Effective Date** and the **Expiry Date** of the **Generic Warranty** defined in Generic Warranties (tsctm5100m000) session, the **Warranty Type** field is set to **Generic Warranty**, but the defaulted **Warranty** from the Service Types (tsmdm0130m000) session is cleared.

Warranty set to No Warranty

The **Warranty Type** field is set to **No Warranty** in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session, if **Warranty** is not defined in the Service Types (tsmdm0130m000) session or on the serialized item.

Setting default warranty type manually

If you manually change the default warranty type, the applicable warranty is also re-defaulted:

- From **No Warranty** to **Serialized Item Warranty**: If the warranty terms on serialized item expire, the coverage time on the order activity is set to expiry date of the serial warranty terms. The serialized warranty is defaulted on the service order activity.
- From **No Warranty** to **Generic Warranty**: If generic warranty and serialized warranty is not applied, you can change the **Warranty Type** from **No Warranty** to **Generic Warranty**. The **Warranty** field is enabled and you can define generic warranty.

- From **Serialized Item Warranty** to **Generic Warranty**: If the serialized item warranty is applicable to the service order and the related cost must be allocated on a generic warranty, the **Warranty** field gets enabled and the **Generic Warranty** of service type is defaulted.

Estimating service order costs

For the estimated service order/part lines cost lines, the **Warranty** check box on the estimated cost lines is checked if the **Warranty** field is defined in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session.

Registering actual service order costs

When registering actual costs on the service order/part lines cost lines, warranty coverage is calculated for the cost lines that are linked to a service order/part lines.

When the **Warranty Type** field is set to **Serialized Item Warranty** in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session, the coverage calculation is based on the warranty coverage terms of the serialized item warranty.

When the **Warranty Type** field is set to **Generic Warranty** in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session, the coverage calculation is based on the **Warranty** defined in the Service Order Activities (tssoc2110m000)/ Part Lines (tsmsc1110m000) session.

Costing service order cost lines

When the **Status** of the service order/part lines cost line is set to **Costed**, financial integration transaction are generated. The allocated amounts are transferred to **Spent** amount in the Warranty Coverage Terms (tsctm1120m500) session. A new record is inserted in the Warranty Transactions (tsctm5101m000) session.

Posting service order to history

The closed and canceled service orders/maintenance sales orders are posted to service order/maintenance sales order history and the warranty type and warranty code are also copied to history.

Warranty handling on customer claims

The warranty on customer claim is based on the **Tagged To** field defined in the Customer Claim Lines (tscmm1110m000) session. The warranty applied to the claim line can be of the type **Serialized Item Warranty** or **Generic Warranty**.

Generic warranty

The claim cost can be **Tagged To** a **Serialized Item Warranty** or **Warranty**. When **Tagged To** is of the type **Generic Warranty**, the warranty is derived from the **Service Type** of customer claim. Otherwise, it is derived from the Serialized Items (tscfg2100m000) session.

If, on the customer claim header, the serialized item is not defined, the **Warranty** is derived from the Service Types (tsmdm0130m000) session. The **Tagged To** field is set to **Generic Warranty** in the Customer Claim Lines (tscmm1110m000) session.

Note

- If the **Force Generic Warranty** check box is selected in the Service Types (tsmdm0130m000) session, you must define **Generic Warranty** in the Service Types (tsmdm0130m000) session. The **Tagged To** field is set to **Generic Warranty** and the generic warranty of the service type is defaulted in the Customer Claim Lines (tscmm1110m000) session.
- If the **Coverage Time** defined in the Customer Claims (tscmm1100m000) session is not within the **Effective Date** and the **Expiry Date** of the **Generic Warranty** defined in Generic Warranties (tsctm5100m000) session, the **Tagged To** field is set to **Generic Warranty** in the Customer Claims (tscmm1100m000) session, but the defaulted **Warranty** from the Service Types (tsmdm0130m000) session is cleared.

Serialized warranty

For the Customer Claim Lines (tscmm1110m000) session, the warranty defined for the serialized item in the Serialized Items (tscfg2100m000) session is used by LN.

The following scenarios are applicable:

- LN sets the **Tagged To** field to **Serialized Item Warranty**, if the **Serialized Item Warranty Terms** check box is selected and the **Template** field is specified in the Serialized Items (tscfg2100m000) session. **Tagged To** is set to **Not Applicable** when the warranty terms are expired and no Generic Warranty is applicable.
- LN sets the **Tagged To** field to **Generic Warranty**, If the **Serialized Item Warranty Terms** check box is not selected and the **Generic Warranty** field is specified in the Serialized Items (tscfg2100m000) session. **Tagged To** is set to **Not Applicable** when the warranty terms are expired.

Note

- When a service type with a **Generic Warranty** is defined on the Customer Claims (tscmm1100m000) session for which the **Force Generic Warranty** check box is selected, any applicable serialized item specific warranty is overwritten with the **Generic Warranty** from the service type.
- If the **Coverage Time** defined in the Customer Claims (tscmm1100m000) session is not within the **Effective Date** and the **Expiry Date** of the **Generic Warranty** defined in Serialized Items (tscfg2100m000) session, the **Tagged To** field is set to **Generic Warranty** in the Customer

Claim Lines (tscmm1110m000) session, but the defaulted **Generic Warranty** from the Serialized Items (tscfg2100m000) session is cleared.

