Infor LN Service User Guide for Warranties

Publication Information

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About this document

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 guide explains the various concepts and processes 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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Chapter 1
Warranties

1

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
- Warranty Duration Type
- Warranty Start Date Determined by

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 warranty data is defaulted to the Serialized Item Warranty (tscfg2650m000) session, when a warranty template is linked to a serialized item in the Serialized Items (tscfg2100m000) session. The warranty data and the terms are defaulted from the Warranty Templates (tsctm0120m000) session based on the warranty template linked to the serialized item.

If the **Use Warranty Events** check box is selected in the General Service Parameters (tsmdm0100m000) and the Service Offices (tsmdm1100m100) sessions, warranty log is generated in the Warranty Log (tscfg2151m000) session. When the warranty is triggered by the events, the events linked to the warranty template are defaulted in the Warranty Events (tscfg2152m000) session.

The duration of the warranty coverage is determined based on the value selected in the **Warranty Duration Type** and the **Warranty Start Determined By** fields:

Warranty Duration Type	Warranty Start Date Determined By	Impact
Fixed Duration	Delivery/ Installation	■ The **Warranty Start Date** is set to the **Delivery Time/ Installation Time** specified for the serialized item in the Serialized Items (tscfg2100m000) session.
		■ The **Warranty Start Date** specified for the warranty is defaulted as the **Effective Date** for the coverage terms linked to the warranty. The **Expiry Date** of the coverage terms is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Valid For** field in the Warranty Coverage Terms (tsctm1120m500) session)
		■ If the **Delivery Time/ Installation Time** specified for the serialized item is modified, the **Warranty Start Date** is updated with the modified value and the **Expiry Date** of the coverage terms is recalculated.
		■ The **Terms Expire On** field is set to the End Date of the longest coverage term. This value is updated when the coverage terms date is modified manually to a date later than the warranty End Date.

- Log data is not maintained for the **Fixed Duration** Warranty Type.

Fixed End Date: The end date of the warranty is fixed.	**Delivery/ Installation**	- The **Fixed End Date** of the warranty is calculated based on the **Delivery Time/ Installation Time** specified for the serialized item in the Serialized Items (tscfg2100m000) session: **Installation Time/ Delivery Time**+ No. of periods (specified in the **Number of Periods** field in the Warranty Templates (tsctm0120m000) session) - The **Effective Date** of the coverage terms linked to the Warranty is set to the **Delivery Time/ Installation Time** specified for the serialized item in the Serialized Items (tscfg2100m000) session. - The **Expiry Date** of the coverage terms is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Valid For** field in the Warranty Coverage Terms (tsctm1120m500). **Note**: The **Expiry Date** of the coverage term cannot exceed the **Fixed End Date** of the warranty. - Log data is maintained for the **Fixed End Date** Warranty Type.
	Defined Events	The **Fixed End Date** of the warranty is set based on the start event defined for the **Event Set** linked to the warranty. The **Warranty Start**

Date is set to the date when the event is executed. The **Fixed End Date** is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Number of Periods** field in the Warranty Templates (tsctm0120m000) session).

- The **Warranty Start Date** set for the warranty is defaulted as the **Effective Date** for the coverage terms linked to the warranty. The **Expiry Date** of the coverage terms is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Valid For** field in the Warranty Coverage Terms (tsctm1120m500) session).

  - **Note**: The coverage terms date can be modified manually. However, the **Expiry Date** of the coverage term cannot be later than the **Fixed End Date** of the warranty.

- Log data is maintained for the **Fixed End Date** Warranty Type.

Flexible Duration	**Defined Events**	
		- The **Warranty Start Date** of the warranty is set based on the start event defined for the **Event Set** linked to the warranty. When the start event is executed, the **Warranty Start Date** is set to the date when the event is executed. - The **Warranty Start Date** set for the warranty is defaulted as the **Effective Date** for the coverage terms linked to the

warranty. The **Expiry Date** of the coverage terms is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Valid For** field in the Warranty Coverage Terms (tsctm1120m500) session).

■ If the dates specified for the coverage terms is updated, the **Terms Expire On** date is also updated.

Combined Duration	Defined Events	■ A Pre-installation and Post-installation period is specified for the warranty. The warranty is applicable only if a predefined start event, that indicates the item's installation, is executed within the specified pre-installation period. A warranty is not applicable if the installation is done after the pre-installation period.
		■ The **Warranty Start Date** is set to the date when the start event is executed, only when the start date is within the defined pre-installation period.
		■ The Warranty End Date is determined based on the value set in the **Combined Duration Type** field:
		■ **Additive**: If the item is installed within the pre-installation period, the warranty is applicable for the complete post-installation period, from the time the item is installed. The **Warranty Start Date** set for the warranty is defaulted as the **Effec-**

tive Date for the coverage terms linked to the warranty. The **Expiry Date** of the coverage terms is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Valid For** field in the Warranty Coverage Terms (tsctm1120m500) session).

- **Subtractive**: If the item is installed within the pre-installation period, the warranty is applicable for the entire (or remaining part of the) post-installation period, from the time the item is installed. The **Warranty Start Date** set for the warranty is defaulted as the **Effective Date** for the coverage terms linked to the warranty. The **Expiry Date** of the coverage terms is calculated as: **Warranty Start Date**+ **Number of Periods** (specified in the **Valid For** field in the Warranty Coverage Terms (tsctm1120m500) session). If the calculated **Expiry Date** of the coverage terms is later than the 'pre-installation period end date', this date is considered as the coverage term end date. The 'pre-installation end date' is calculated as: The (first) **Transaction Date** from the Warranty Log (tscfg2151m000)

session + the pre-installation period defined in the Serialized Item Warranty (tscfg2650m000) session, converted to days.

- Example, if the Pre-installation period is 5 years and the Post-installation period is 1 year, and the pre-installation period is started and the serialized item is installed after 4.5 years:

    - For a combined warranty with type Additive, 1 year warranty is given

    - For a combined warranty with type Subtractive, 0.5 year warranty is given.

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.

Start/Stop serialized item warranty by event

When an event that starts or stops a warranty is executed, an action is logged in the Warranty Log (tscfg2151m000) session with the **Kind of Change** field set to **Timer Log**.

The warranty timer can be started by only one event, for the first time. For example, when the item is sold or shipped (issued). When this start event is executed, the **Warranty Start Date** is updated with the **Last Start Date** from the Warranty Log (tscfg2151m000) session.

The events can stop (pause) and start warranty at any given point of time. These actions are logged in the Warranty Log (tscfg2151m000) session. The overall warranty period can be extended for the total duration for which the warranty is stopped.

The warranty events can be started/stopped automatically or manually.

Extending the serialized item warranty period

The Warranty Log (tscfg2151m000) session is used to track the period for which the warranty for a serialized item is stopped (paused). The warranty duration is extended with this period, after the item repair process is completed. The warranty duration can be extended only when the **Warranty Duration Type** is set to **Flexible Duration** or **Combined Duration** in the Warranty Templates (tsctm0120m000) session.

The duration of the warranty is extended for the number of days between the first logged warranty stop event and the last logged warranty start event.

Note
More than one start/stop event can exist for a warranty.

The **Warranty End Date Updated On** is updated accordingly in the Serialized Item Warranty (tscfg2650m000) session.

For a warranty, if the **Update Warranty End Date automatically** check box is selected in the Serialized Item Warranty (tscfg2650m000) session, the **Expiry Date** of the linked warranty coverage terms is extended with the number of days for which the warranty is stopped. The **Terms Expire On** date is updated accordingly.

If the **Update Warranty End Date automatically** check box is cleared, you can use the Extend Warranty option in the Serialized Item Warranty (tscfg2650m000) session, to extend the warranty.

If the **Warranty Duration Type** is set to **Combined Duration**, the Pre-Installation and the Post-Installation periods must be defined. The extension of the warranty duration is applicable only for the Post-Installation period. This is the period in which the warranty coverage is active.

Determine warranty coverage

When the event that starts the warranty is executed, the **Start Date** for the warranty is defaulted with the date when the event executed. Infor LN checks if there are open service objects such as calls, service order and maintenance sales orders, linked to serialized item for which the warranty is applicable. If existing, you can select to update the start date for the coverage terms linked to the open service objects. The warranty coverage for the linked estimated and the actual cost lines is recalculated.

If a warranty is terminated for a serialized item, the warranty for the service object is applicable only when the coverage time defined for the service object is before the termination date of the warranty.

Note

The warranty coverage is applicable only for the orders with the **Pricing Method**, **Time and Material**.

Terminate Warranty

You can use the Terminate Serialized Item Warranty (tscfg2250m000) session to terminate a warranty that is linked to a serialized item and is active. The **Terminate Warranty** option in the Serialized Item Warranty (tscfg2650m000) session can be used to access this session. You must specify the **Reason** Code and the **Termination Date**. Before terminating the warranty, Infor LN checks if a service object (open orders, calls and so on) exists for the serialized item, with the **Warranty Type** set to Serialized Item Warranty, that is yet to be processed. If the **Simulate** check box is selected in the Terminate Serialized Item Warranty (tscfg2250m000) session, these service objects are printed. If the **Simulate** check box is cleared:

- The **Warranty Type** field is set to No Warranty
- The warranty for the service object is deleted
- The warranty amount for the related cost lines is recalculated.

After the warranty is terminated, Infor LN updates the values in the **Terminated By**, Termination Reason and the **Termination Text** fields and selects the **Terminated** check box in the Serialized Item Warranty (tscfg2650m000) session.

Chapter 2
Managing Warranty

<div style="text-align: right">**2**</div>

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 Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - 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)/ Maintenance Sales Order - Part Lines (tsmsc1110m000) session, the coverage calculation is based on the **Warranty** defined in the Service Order Activities (tssoc2110m000)/ Maintenance Sales Order - 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.