


Warranty Claims



Prerequisites

This feature

- is available for sites on versions 3.94+.
- must first be switched on for your site by [Commerce Vision](#).

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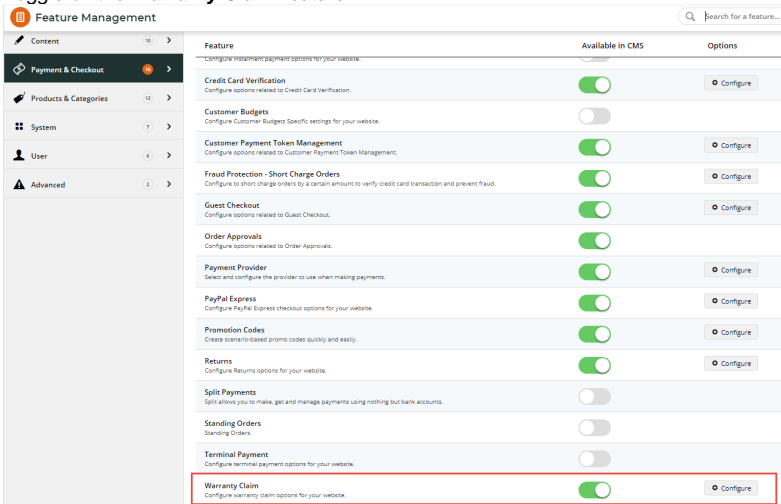
Overview

For businesses that handle warranty claims, the process has traditionally been manual and full of paperwork. But not anymore. BPD websites now offer the ability to enter warranty claims, integrating them to your ERP as returns or credit requests. You can specify the reasons a user might submit a claim, and determine whether they can have replacement parts sent to 3rd party addresses. You can also require supporting invoice numbers for any warranty reason, with or without validation.

1. Enable and configure Warranty Claim

This guide helps you implement the Warranty Claim functionality for your site.

1. In the CMS, navigate to **Settings Feature Management Payment & Checkout**.
2. Toggle on the **Warranty Claim** feature.



3. Click **Configure**.
4. *Configure settings as required.*

Setting	Description
Prevent Editing of Delivery Address?	This prevents the user submitting the claim from changing the default delivery address (loaded from the account info in your ERP). Default: ON
Claim Entry Field Group	This is the field group listing questions displayed on the claim form, for example 'Model Number' or 'Size'. As field groups are generally maintained by Commerce Vision, please contact us if the default field group does not meet your needs. Default: WarrantyClaimEntryHeaderCustomFieldGroup
Claim Reason Lookup	A semicolon-separated list of reason codes and their descriptions (for example: "PRQ=Parts Request; DOA=Dead on Arrival"). The descriptions will appear to the user in a dropdown selector.
Reason Codes Requiring Invoice #	If the user selects a reason listed here, a mandatory 'Invoice Number' field will appear on their claim form.
Reason Codes Requiring Invoice Validation	If the user selects a reason listed here, the invoice number they enter will be validated against the ERP during claim submission.
Reason Codes Requiring Price Display	If the user selects a reason listed here, pricing for products on the claim will be displayed.
Products Not Requiring Invoice Validation	If the user submits a claim for a product on this list, the invoice will not need to be validated. For example, a claim for supply parts, which aren't associated with a previous purchase/invoice.

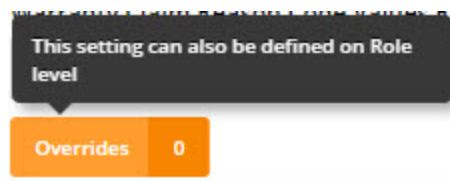
5. Add any overrides required.

Overrides

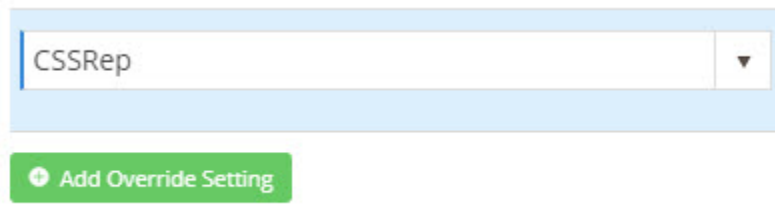
Global settings apply to everyone, but you can override them at the Role level if required.

For instance, you might have one set of reason codes that reps can use, and another for retailers. In this situation you could create overrides for these roles.

- Each setting has an 'Overrides' option. The number of current overrides for that setting is also displayed (in the image below, there are zero). Click **Overrides** for the setting you wish to change.



- A popup will open. Click **Add Override Setting** and enter the name of the role you're overriding for. This field is a lookup, so you can **select the role** from the list that appears as you type.



c. Enter the value for this role in the **Override Value** field.

Override Value

RPL=Replacement Request;RPR=Repair Request

You can refer to the Global setting value, which is also shown (and can be edited) on the popup.

Global Setting

CRN=Defect Assessment;SUP=Parts Request

d. Repeat these steps for any other roles that need to override the global setting, then click **Confirm**.

e. Don't forget to **Save** / **Save and Exit** when you've finished!

6. When you're ready, toggle '**Enable Warranty Claims**' on.



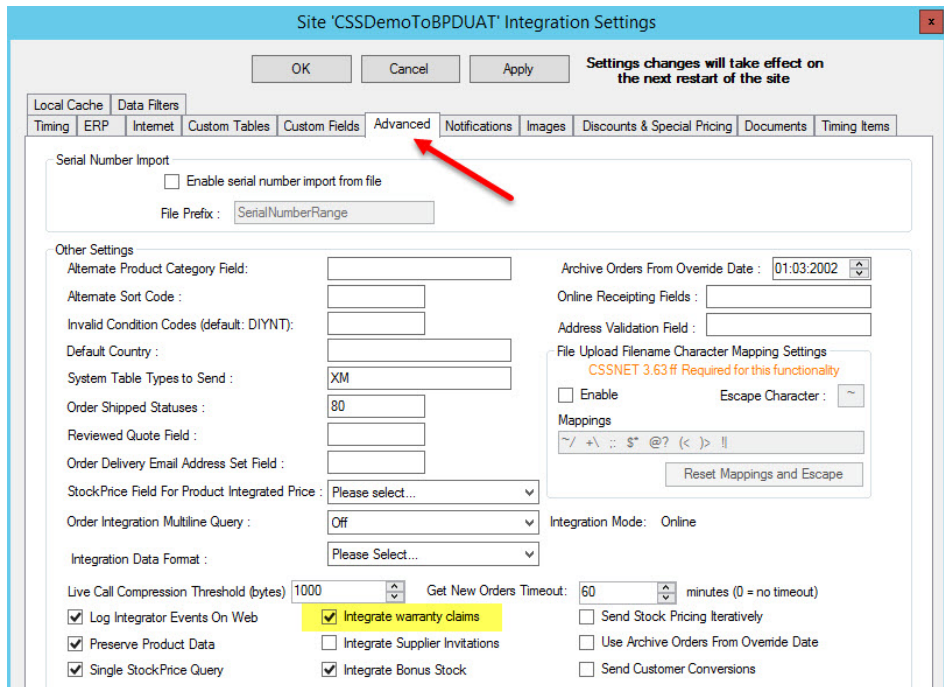
7. Click **Save** or **Save and Exit**.

2. Integrate online warranty claims to your ERP

In order to integrate web-based warranty claims to your ERP, you'll need to enable the function on your integrator.

1. Open the integrator client.
2. Select the **Settings** gear icon.
3. Select the **Advanced** tab.

4. Tick **'Integrate Warranty Claims'**.



Site 'CSSDemoToBPDUAT' Integration Settings

OK Cancel Apply

Settings changes will take effect on the next restart of the site

Local Cache Data Filters

Timing ERP Internet Custom Tables Custom Fields **Advanced** Notifications Images Discounts & Special Pricing Documents Timing Items

Serial Number Import

☐ Enable serial number import from file

File Prefix : SerialNumberRange

Other Settings

Alternate Product Category Field :

Alternate Sort Code :

Invalid Condition Codes (default: DIYNT) :

Default Country :

System Table Types to Send : XM

Order Shipped Statuses : 80

Reviewed Quote Field :

Order Delivery Email Address Set Field :

StockPrice Field For Product Integrated Price : Please select...

Order Integration Multiline Query : Off

Integration Data Format : Please Select...

Live Call Compression Threshold (bytes) 1000 Get New Orders Timeout: 60 minutes (0 = no timeout)

☒ Log Integrator Events On Web ☒ **Integrate warranty claims** ☐ Send Stock Pricing Iteratively

☒ Preserve Product Data ☐ Integrate Supplier Invitations ☐ Use Archive Orders From Override Date

☒ Single StockPrice Query ☒ Integrate Bonus Stock ☐ Send Customer Conversions

Archive Orders From Override Date : 01.03.2002

Online Receipting Fields :

Address Validation Field :

File Upload Filename Character Mapping Settings

CSSNET 3.63# Required for this functionality

☐ Enable Escape Character : ~

Mappings

~/ +\ :: \$* @? (< > |)

Reset Mappings and Escape

Integration Mode: Online

5. Click **Apply**, then **OK**.

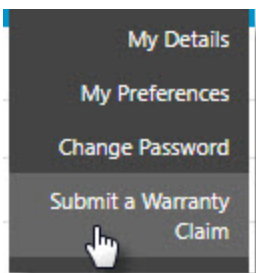
6. **Stop and Re-start** the integrator for that site. If you're unsure how to do this, see [Integrator - Stop and Start](#).

3. Edit Warranty Claim templates (optional)

You will have access to warranty claim templates once the Warranty Claim feature is enabled for your website. You can edit the display text and buttons in the widgets designed for warranty claims. (See Related help below.)

How your customer submits a warranty claim

1. The customer logs in (with a role that has access to warranty claims), and navigates to **Dashboard Submit a Warranty Claim**.



2. The Claim Entry page is loaded, with the fields here defined by the *Claim Entry Field Group* in Feature Settings.

3. The customer enters information related to the claim, such as fault code, reason, and description.

Warranty Claim Entry

Fault Information

Warranty Claim Fault Code

Warranty Claim Fault Description

Warranty Claim Reason Code *

Parts Request

Colour

Model Number

Model Year

Retailer or Consumer

Retailer

Size

Brand

Arc Levers

4. The customer then adds the relevant product code(s) to the claim. Documents can also be attached if required (such as scanned copies of invoices or other proof of purchase).

+

Add Products

Product

Qty

Product Code

+

-

+


Add To Claim

📎

Upload Files

Select file(s) to upload:

Select files...

Product	Qty	Remove
<div><div></div><div>Lobster Phenom 2 Club Series Tennis Ball Machine Code: CV121</div></div>	1	<div><div>🗑️</div>Remove</div>

Subtotal (ex GST)

Plus GST

Total (inc GST)

\$3,321.15

\$332.12

\$3,653.27

☐ Reset Warranty Claim

📄

Submit Warranty Claim

5. The claim is submitted and integrated to your ERP as a sales order (either a return or a credit note, depending on the reason code selected). From here, your normal business workflow is used to approve and process the claim.

✓ Warranty claim sent for approval

Your warranty claim is now in the process of being approved. The details of your claim are displayed below.



Always test out new functionality on your Stage site first! If you require assistance with any of the above, please [contact our Support team](#).

Related help

- [Warranty Claim Lines Widget](#)
- [Warranty Claim Reset Button Widget](#)
- [Warranty Claim Submit Button Widget](#)
- [Warranty Claim Checkout Field Group Widget](#)
- [Warranty Claim Start New Button Widget](#)