CFA Software, Inc.

Optimize Fleet Productivity

How to Setup Parts Warranty in CFAWin8

Users can setup parts warranty for stocked parts in CFAWin8 based on Days or Meter Usage:

- Part warranty periods begin when the part is disbursed to a unit on a Repair Order. *
- CFAWin8 displays Meter, Date, or Meter/Date via the Warranty column in the part transaction line on a Repair Order to signify an available warranty if the same part is disbursed to the same unit within the warranty period. **
- Part warranties are applied directly to the Repair Order when posted, do not affect the part's Extended Price, and are deducted from the Stocked Part Cost in the Detail line section.
- The Potential Warranty information can be printed via the File menu in the Potential Warranty window.
- Be aware of internal operation guidelines prior to a period end close for credits due from vendors which have not yet been recovered!
- **A Part Warranty can be changed or removed until it has been applied. ***
- **Warranty Credits do not show in the Inventory Table!**

I. **Parts Warranty Setup:**
1. *Access the Inventory Table*
2. *Select the desired Part#*
3. *Enter Days **OR** Meter Usage in the Replenishment, Warranty, Back Order, Notes section:*
    i. Days – the number of days a part is covered under warranty; use all 9's for lifetime coverage.
    ii. Meter Usage – the amount of meter usage (e.g., miles, hours, etc.) a part is covered under warranty.
4. *Save the changes*
5. *Disburse part(s) on Repair Orders as usual *

II. **Parts Warranty Claim:**
1. *Disburse the same part(s) for the same unit on a new Repair Order **
2. *Click the ellipsis button in the Inventory Warranty field of the Repair Order*
3. *Do the following in the Potential Warranty screen:*
   - **Warranty Credit:** (*Do This Last!*) Create a warranty credit.
   - **Vendor:** This option is blank by default and must be populated to issue a credit.
   - **Credit Type:** Drop down menu options to select the type of credit being issued.
       i. None/Generic Credit – Both options are not currently used.
       ii. Part Exchange – Original part(s) being replaced at original cost; only the Qty field can be updated and the user is responsible for the value entered.
       iii. Unit Price Credit – Original part(s) being replaced at any cost other than original cost; Qty and Unit Price fields can be updated and the user is responsible for the values entered.
       iv. Total Credit – Original part(s) being replaced at a total dollar value credit; only Extended Price field can be updated and the user is responsible for the value entered.
   - **All Other Fields:** Update automatically.

How to Setup Parts Warranty in CFAWin8

4. *Select the Warranty Credit field and click the Create icon*
    i. Warranty Credit field (Potential Warranty window) will now display a Remove option ***
5. *Close the potential warranty screen*
6. *Verify the credit value is correct in the Warranty Credit field on the part line*
    i. Inventory Warranty field will display Created when navigating off of the Detail line and back
7. *Proceed with Repair Order data entry as usual*
8. *Post the Repair Order to apply the part warranty*
    i. Inventory Warranty field will display Applied once the Detail line has been posted

III. **Reports Including Warranty Received Information:**
    Equipment Reports:
    Repair Transaction Audit - Detail with Parts (eqraudt2.rpt)
    - Equipment repair report which displays full repair order detail and parts used.
    Inventory Reports:
    Transactions All (pttall.rpt)
    - Inventory report which displays all transaction types regarding parts (i.e. Disbursements, Purchases, Transfers, Physical Inventory, and Adjustments.)
    Transactions Disbursement (pttdisb.rpt)
    - Inventory report filtered specifically for part Disbursement transactions.