



# Warranty Claiming Onboarding

# Key Terminology





- ServiceBench® System
  - Used by distributors and service providers (dealers) to determine warranty coverage (entitlement), check product history, submit warranty claims, check claim status, run reports, perform service provider administration
- Warranty Certificate
  - Document that details the company's warranty obligations to the end user
- Service Policy Manual
  - This manual provides an overview of Carrier's warranty policies and special programs for use by Carrier and distributor personnel

# Key Terminology Examples



Snippet of Main Menu

**Carrier**  
turn to the experts

**CARRIER CORPORATION**

**Limited Warranty for Air Conditioner & Heat Pump Condensing Units with Puron® (R-410A) Refrigerant**

**FOR WARRANTY SERVICE OR REPAIR:**  
Contact the installer or a Carrier dealer. You may be able to find the installer's name on the equipment or in your Owner's Packet. You can also find a Carrier dealer online at [www.carrier.com](http://www.carrier.com)

For help, contact: Carrier Corporation, Consumer Relations, P.O. Box 4808, Syracuse, New York 13221, Phone 1-800-227-7437

**PRODUCT REGISTRATION:** You can register your product online at [www.carrier.com](http://www.carrier.com)

Model Number \_\_\_\_\_ Serial Number \_\_\_\_\_  
Date of Installation \_\_\_\_\_ Installed by \_\_\_\_\_  
Name of Owner \_\_\_\_\_ Address of Installation \_\_\_\_\_

Carrier Corporation (hereinafter "Company") warrants this product against failure due to defect in materials or workmanship under normal use and maintenance as follows. All warranty periods begin on the date of original installation. If a part fails due to defect during the applicable warranty period Company will provide a new or remanufactured part, at Company's option, to replace the failed defective part at no charge for the part. Alternatively, and at its option, the Company will provide a credit in the amount of the then factory selling price for a new equivalent part toward the retail purchase price of a new Company product. Except as otherwise stated herein, those are Company's exclusive obligations under this warranty for a product failure. This limited warranty is subject to all provisions, conditions, limitations and exclusions listed below and on the reverse (if any) of this document.

**RESIDENTIAL APPLICATIONS**  
This warranty is to the original purchasing owner and subsequent owners only to the extent and as stated in the Warranty Conditions and below. The limited warranty period in years, depending on the part and the claimant, is as shown in the table below.

Product	Item	Limited Warranty (Years)	
		Original Owner	Subsequent Owners
Air Conditioner or Heat Pump Condensing Unit	Parts	10* (or 5)	5
	Compressor	10* (or 5)	5

\* If properly registered within 90 days of original installation, otherwise 5 years (except in California and Quebec and other jurisdictions that prohibit warranty benefits conditioned on registration). See Warranty Conditions below.

**OTHER APPLICATIONS**  
The warranty period is five (5) years on the compressor, and one (1) year on all other parts. The warranty is to the original owner only and is not available for subsequent owners.

**LEGAL REMEDIES** - The owner **must** notify the Company in writing, by certified or registered letter to Carrier Corporation, Warranty Claims, P.O. Box 4808, Syracuse, New York 13221, of any defect or complaint with the product, stating the defect or complaint and a specific request for repair, replacement, or other correction of the product under warranty, mailed at least thirty (30) days before pursuing any legal rights or remedies.

49004DP172 01/2015

**Carrier**

Originator: Bob Lang  
E-mail: [Bob.Lang@carrier.utc.com](mailto:Bob.Lang@carrier.utc.com)  
Phone #: 317-481-5752  
Policy Name: Service Policy Manual

Policy Number: DOM 200  
Issue Date: 12/31/18 Effective Date: 01/01/19 Supersedes Date: N/A  
Applicable Business: Residential X Commercial X Page 1 of 80

**Purpose / Objective**  
Service Policy Manual provides Carrier's warranty policies and special programs relating to quality and warranty issues.

**Highlights of Changes:** General updates

**Detail of Procedures(s):**

**1.0 Overview**

**Introduction**  
This manual provides an overview of Carrier's warranty policies and special programs for use by Carrier and distributor personnel.

**Uses for This Manual**  
Distributors can use this manual to:

- Train new post-sale support personnel
- Develop manuals for their dealers (this manual should not be provided to dealers)
- Serve as a reference for distributor and Carrier personnel with questions about particular Carrier warranty policies.

We strongly encourage users to familiarize themselves with the following supporting documents:

- [Warranty certificates](#) supplied with products
- [Relevant Product Bulletins](#)
- [Service Bulletins](#)
- [Commercial Start-Up and Optional Extended Warranty Pricing](#)
- [Replacement Components Parts Operational Manuals \(POM\)](#)

These documents are available on HVACpartners and typically outline warranty conditions as well as detailing what is and is not covered.

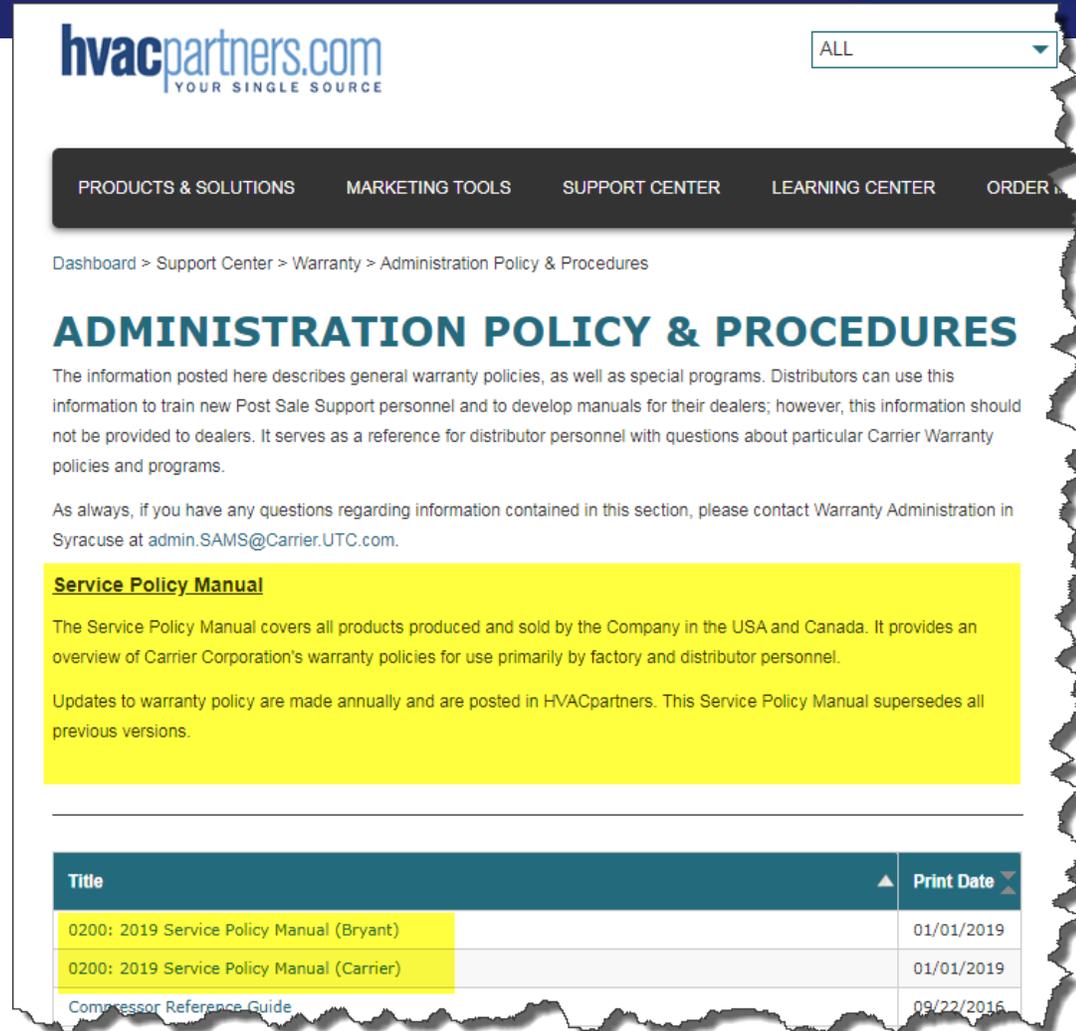
**Products Covered in Manual**  
This manual covers all products produced and sold by Carrier, Bryant, Payne in the USA and Canada.

**Updates**  
Updates to the warranty policy are made as needed and are posted in HVACpartners.

**Questions**  
If you have questions regarding information contained in the SPM, please call us at 1-866-989-2524.  
Refer to the [General Reference Guide](#) for Plant and Serial Number Questions.

*Continued on next page*

# Finding the Service Policy Manual on HVACpartners



# Warranty 101





- To be considered as a warrantable event:
  - There must be a failure that occurs during the warranty period
  - There must be a part that fails or a unit repair for a failure described on the warranty card
  - There are failures that are not covered under warranty such as: damage, delivered incomplete or incorrect, cosmetic damage, installation problems, misapplications
  - Certain maintenance items are never covered such as: most sheet metal components, air filters, loose or poorly dressed wires or tubes



- Refer to Warranty Conditions and Exclusions listed on the warranty certificate.
- Limited warranties typically cover reimbursement for the failed part. Any labor allowance (outside of DOA) or unit exchanges are handled through the empowerment / concession process.
- Warranty claims must be submitted within 90 days of the repair date (60 days claim resubmission time when correcting rejected claims).
- Carrier reserves the right to audit claims and direct claims to manufacture review before disposition.
- Any exceptions to the stated warranty policy contained in the warranty certificate must be preapproved by the Technical Service team.

# Residential “Limited” Parts Warranty



## Exclusions Due to Environmental Influence

The Company is not responsible for the circumstances outlined below:

- Damage as a result of floods, winds, fires, lightning, accidents, corrosive environment, or other conditions beyond the control of the manufacturer.
- Corrosion damage to equipment not expressly warranted for use in a corrosive environment. Such use constitutes abuse of the equipment and voids any consideration for subsequent corrosion damage claims.  
**Note:** Corrosive environments include areas around petrochemical plants, industrial sites where concentrations of corrosive chemicals are present, and those areas along the “coastal perimeter” where placement of units would subject them to wind-borne or direct salt spray corrosion.

## Standard Product Warranty Exclusions

The table below details parts/materials that, unless specifically included in a special plan, are excluded from the standard product warranty.

Part	Residential
Belts	X
Brackets	X
Cosmetic Parts	X
Fuses	X
Gaskets	X
Grommets	X
Maintenance items	X
Paint	X
Panels and sheet metal (with the exception of functional or safety related sheet metal parts)	X
Pulleys	X
Refrigerant	X
Screws, nuts and bolts	X

## Residential Equipment in Commercial Application

If residential equipment is installed in a commercial application that equipment is now covered by the commercial warranty terms for that product.

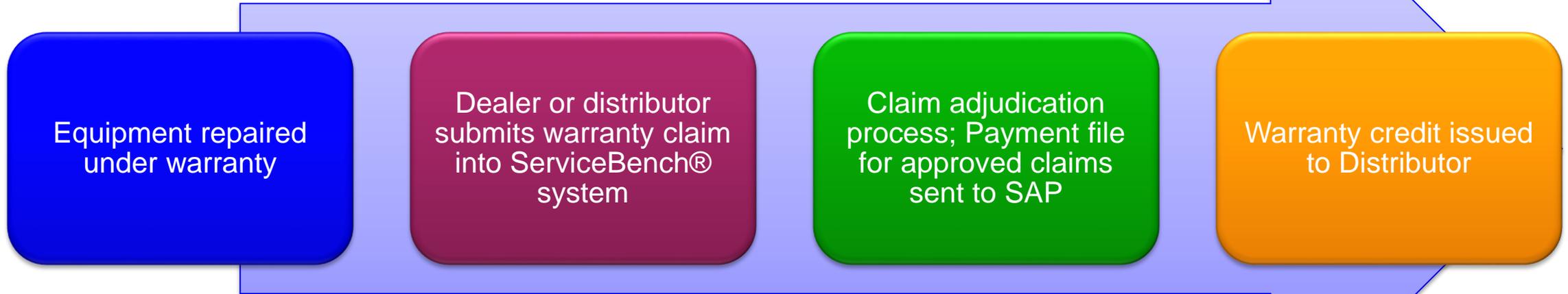
**Reference:** For more information, see the “other application” section on the warranty card.

Please review and consider Company Policy prior to submitting a Claim or Case for help with a Claim that has a Part Error Message. Ex., if your claim has an error related to an “Invalid Component” check first to see if the part is excluded from the limited parts warranty (even if the part is found in EPIC as a valid part for that unit).

Also, consider these tips:

- Review Company Policy – Exclusions section (Service Policy Manual, General Policy section).
  - Certain categories of items are mentioned, we would like for you to note the following:
    - Maintenance Items include but are not limited to Belts, Pulleys, and Service Valve Cores & Caps
    - Cosmetic Parts (Non-Operational Parts) / Panel and Sheet Metal Parts include but are not limited to Grills, Fan Guards, Badges or Logos
- Confirm that the part is not excluded from warranty coverage and is actually covered by Policy.
- Check the “Causal” part selected and the Component Code on the Claim, as well as the Diagnosis provided by the Servicer then make sure the repair is covered under Warranty.

# High Level Warranty Claim Process



You have 90 days from the Date of Repair to submit the claim.

Approved claims submitted from Thursday through Wednesday will be paid on Friday.

# ServiceBench® System



**ENTITLEMENT SEARCH**

Service Administrator: United Technologies Corporation

Model Number: 24ACC424A003

Serial Number: 0618E04751

First Name:

Last Name:

Phone:

Service Contract Number:

**CHECK ENTITLEMENT**

Install Date: 03/01/2018

Application Type: Other Residential Application

---

Product Name: 14S,AC SOUTHEAST

Model Number: 24ACC424A003

Discrete Model Number: 24ACC424A0030011

Serial Number: 0618E04751

Owner:

Address:

Phone:

Manufactured Date: 02/06/2018

Shipped Date: 02/22/2018

Date Installed:

Date Transferred:

Warranty Policy Code: CP3

Warranty Policy Description: FOR SPECIFIC COVERAGE ON NON-REGISTERED UNITS IN OCCUPIED AND COMMERCIAL APPLICATIONS, REFER TO V

Mark As:

Shipped to Distributor Name: Mid-Atlantic Distribution, Hanover, HQ

Shipped to Distributor Number: 200244

Replacement Of Model(s):

Replacement Of Serial Number(s):

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**Warranty Information**

Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed A
ALL	Other Residential Application	Subsequent	Accessory Exchange	30 days	10/01/20
			Standard Parts Warranty	5 years	
Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed A
ALL	Other Residential Application	Original	Accessory Exchange	30 days	10/01/20
			Standard Parts Warranty	5 years	

SEARCH ENTITLEMENT    START NEW CLAIM    NEW PRODUCT REGISTRATION

**PRODUCT HISTORY**

View Entitlement

Product Number: 40GVM009--3    Serial Number: 0214V51664    Service Administrator: UTC - United Technologies Corporation

**CLAIM HISTORY**

Rolling 12 Months Total Amount Approved: \$0.00    Total Amount Approved: \$308.81

Service Provider	Service Provider Location	Claim Number	Reference Number	Claim Type
837326645 - Hampton Mechanical Inc	Hampton Mechanical Inc - 13158-31200	CRHA3N1V4	CRHA3N1V4	Warranty

**SERVICE HISTORY**

Service Date	Claim Number	Customer Complaint	Service Explanation
08/12/2015	CRHA3N1V4		UNIT FREEZING UP, REPLACED.

**RETURNS/EXCHANGE HISTORY**

**WARRANTY CLAIM**

Claim Inbox \* Claim Review

13158-31200 - Hampton Mechanical Inc  
4720 HIGH POINT DR  
GIBSONIA, PA 15044.7400 UNITED STATES  
412-487-8770

Manufacturer: UTC - United Technologies Corporation

Dealer: 837326645 - Hampton Mechanical Inc

Distributor:

Reference Number:

Model Number: 24ACC424A003

Serial Number: 0618E04751

Warranty Type:

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

**EQUIPMENT INSTALLATION INFORMATION**

Equipment Owner Company Name:

Installation Owner First Name:

Installation Address:

Application Type:

**SERVICE DETAIL INFORMATION**

Fail Date:

Optional Contract Number:

Bulletin/Authorization Number:

\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial fields

Replacement Model Number:

Replacement Invoice Number:

Replacement Disposition:

Replacement Approved Amount:

Number of Part Lines: 4

Causal Part	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number

SAVE    SUBMIT

**CLAIM REVIEW**

Claim Hotlist \* Claim Inbox \* By Consumer \* Advanced Search

To find claims based on additional fields, use the Advanced Search Link above

Service Administrator: UTC - United Technologies Corporation

Serial Number:

Claim Number(s): CRHA3N1V4

Reference Number(s):

Transaction Number(s):

**Search Results**

Service Provider	Account Number	Service Provider Location	Claim Number	Reference Number	Claim Type	Status	Date Submitted	Amount Submitted	Date Approved
837326645 - Hampton Mechanical Inc	13158-31200	Hampton Mechanical Inc	CRHA3N1V4	CRHA3N1V4	Warranty	Paid	11/19/2015		11/19/2015

SEARCH

Replacement Unit Price:

Replacement Mark Up:

Requested Replacement Amount:

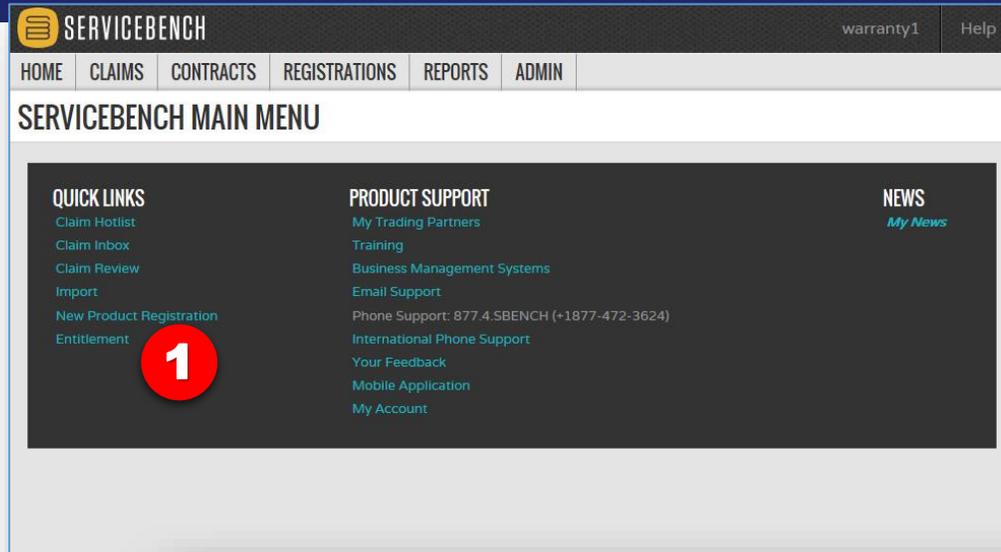
Images are for illustration purposes only; model number(s), serial number(s) may not be applicable to your business. ServiceBench® and the ServiceBench logo are registered trademarks of Asurion, LLC. Presentation and training material developed by the Warranty Process Team\_Jan2020

# ServiceBench® System Training

- Entitlement
- Product History
- Warranty Types
- Entering Claims

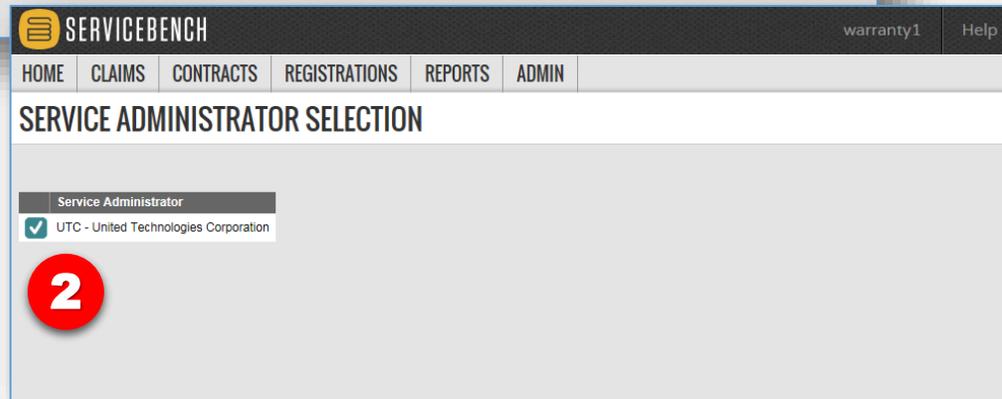


# Entitlement — Confirming Warranty Coverage



In order to confirm warranty coverage you will use Entitlement.

1. Whether you are confirming warranty or starting a new claim, ALWAYS start by clicking on the Entitlement link from the ServiceBench® Main Menu.
2. Click on the Check Mark to select UTC as the manufacturer.



# Entitlement — Confirming Warranty Coverage



**SERVICEBENCH**

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

## ENTITLEMENT SEARCH

Service Administrator: United Technologies Corporation

Model Number

Serial Number\*  **3**

First Name

Last Name

Phone

Service Contract Number

**CHECK ENTITLEMENT**

Install Date

Application Type

**4**

**SEARCH ENTITLEMENT**

3. Enter the unit Serial Number.
4. Click SEARCH ENTITLEMENT or hit “Enter”.

# Entitlement — Confirming Warranty Coverage



The screenshot shows the ServiceBench interface for Entitlement Search. A warning message box is displayed, stating "Install Date and Application Type must be entered". The form fields include Service Administrator (United Technologies Corporation), Model Number (DLCERAH12AAK9CMN), Serial Number (V181344436), and checkboxes for First Name, Last Name, and Phone. The CHECK ENTITLEMENT section has Install Date and Application Type (Owner Occupied Residential) fields. A table below shows product details: Product Name (DLS 12K 230V HP CDU), Model Number (DLCERAH12AAK9CMNA), Discrete Model Number, Serial Number (V181344436), Owner, Address, Phone, Manufacture Date (03/26/2018), Shipped Date (06/08/2018), Date Installed, and Date Transferred.

Warranty coverage is driven by Install Date and Application Type. Both an Installation Date and Application Type are required in order to obtain Entitlement on equipment that isn't registered and doesn't have an established Installation Date and Application Type. This will allow the system to provide a more accurate coverage. Entering the **actual** Install Date and Application Type returns Warranty Coverage detail that is most precise. If the Install Date is not known, then we suggest using what is listed on the Warranty Certificate, as a rule of thumb. ***"If the date of original purchase cannot be verified, then the warranty period begins ninety (90) days from the date of product manufacture (as indicated by the model and serial number)."*** The summary section will display the manufacture date and ship date of the unit, allowing you to quickly estimate an installation date.

5. Click OK.
6. Enter the Install Date and select the Application Type.
7. Click the SEARCH ENTITLEMENT button.

# Entitlement — Confirming Warranty Coverage



**SERVICEBENCH** Dev warranty1

HOME CLAIMS **10** ENTITLEMENTS REPORTS ADMIN

Product History

### ENTITLEMENT SEARCH

Service Administrator: United Technologies Corporation

Model Number: [DLCERAH12AAK#CMNA]

Serial Number\*: [V181344438]

First Name: [ ]

Last Name: [ ]

Phone: [ ]

Service Contract Number: [ ]

**CHECK ENTITLEMENT**

Install Date: [08/14/2018]

Application Type: [Owner Occupied Residential]

---

Product Name: DLS 12K 230V/HP CDU  
 Model Number: DLCERAH12AAK#CMNA  
 Discrete Model Number:  
 Serial Number: V181344438 **9**  
 Owner:  
 Address:  
 Phone:  
 Manufactured Date: 03/26/2018  
 Shipped Date: 06/08/2018  
 Date Installed:  
 Date Transferred:  
 Warranty Policy Code: MIDENTRY  
 Warranty Policy Description: Warranty Policy for MIDEA Entry Tier Product for MIDEA Distributors  
 Mark As:  
 Sold to Distributor Name:  
 Sold to Distributor Number:  
 Sold to Distributor City:  
 Sold to Distributor State:  
 Replacement Of Model(s):  
 Replacement Of Serial Number(s):

**Warranty Information** **8**

Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed After	Warranty Start	Warranty Stop
MIDMID	ALL	ALL	Compressor	5 years	01/01/2018	08/14/2018	08/14/2023
			Standard Parts Warranty	2 years			08/14/2020

**11**

SEARCH ENTITLEMENT START NEW CLAIM CHANGE SERVICE ADMINISTRATOR NEW PRODUCT REGISTRATION

8. Warranty Information is now provided.
9. Homeowner information would be found here if the unit is registered or if a claim has already been submitted on the serial number.
10. You should review Product History to prevent entering a “duplicate” claim.
11. All claim submittals should be started from the Entitlement Search screen by clicking the START NEW CLAIM button.

Registration Id:	R2938
Product Name:	SENTRY 14 SEER, HP
Model Number:	CH14NB03600G
Discrete Model Number:	CH14NB03600GABAA
Serial Number:	1219X4
Owner:	
Address:	
Phone:	
Manufactured Date:	03/19/2019
Shipped Date:	04/01/2019
Date Installed:	04/19/2019
Registration Date:	10/21/2019
Date Transferred:	
Warranty Policy Code:	CP3
Warranty Policy Description:	FOR SPECIFIC COVERAGE ON NON-REGISTERED UNITS INSTALLED IN OWNER OCCUPIED, NON-OWNER OCCUPIED AND COMMERCIAL APPLICATIONS, REFER TO WARRANTY CERTIFICATE
Mark As:	
Sold to Distributor Name:	
Sold to Distributor Number:	
Sold to Distributor City:	
Sold to Distributor State:	
Replacement Of Model(s):	
Replacement Of Serial Number(s):	

# Product History – Warranty Claims on a Serial Number



**ENTITLEMENT SEARCH**

Service Administrator: United Technologies Corporation  
Model Number: DLFSDAH18XAK  
Serial Number: 2004A14407  
First Name:   
Last Name:   
Phone:   
Service Contract Number:

**CHECK ENTITLEMENT**

Install Date: 03/01/2018  
Application Type: Owner Occupied Residential

Product Name: DLS 18K 230V HP DUCTED  
Model Number: DLFSDAH18XAK  
Discrete Model Number:  
Serial Number: 2004A14407  
Owner:  
Address:  
Phone:  
Manufactured Date: 05/13/2004  
Shipped Date: 05/25/2004  
Date Installed:  
Date Transferred:  
Warranty Policy Code: MIDHIGH  
Warranty Policy Description: Warranty Policy for MIDEA High Tier Product for MIDEA Distributors  
Mark As:  
Sold to Distributor Name: MIDBEC  
Sold to Distributor Number: 1001040  
Sold to Distributor City: Drummondville  
Sold to Distributor State: QC  
Replacement Of Model(s):  
Replacement Of Serial Number(s):

**Warranty Information**

Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length
MIDMID	ALL	Original	Compressor	7 years
			Standard Parts Warranty	5 years

SEARCH ENTITLEMENT    START NEW CLAIM    NEW PRODUCT REGISTRATION

1. From the ENTITLEMENT SEARCH screen, click on the Product History hyperlink.
2. CLAIM HISTORY lists any claims that have been filed against the unit in question along with select claim information.
3. SERVICE HISTORY contains additional claim detail including part numbers and a description of the service.
4. You can click the “eye” icon to open up the claim and view the complete claim.

**PRODUCT HISTORY**

Product Number: DLFE...K#CMNA Serial Number: V181343470 Service Administrator: UTC - United Technologies Corporation

**CLAIM HISTORY**

12 Months Total Amount Approved: \$0.55 Total Amount Approved: \$0.55

Service Provider	Service Provider Location	Claim Number	Reference Number	Claim Type	Status	Date Submitted	Amount Submitted	Date Approved	Amount Approved
1001198560 - GEARY PACIFIC SUPPLY	GEARY PACIFIC SUPPLY - 1001552	CRL6VQ1KT	CRL6VQ1KT	Warranty	Approved For Payment	06/13/2018		06/13/2018	\$0.55

**SERVICE HISTORY**

Service Date	Claim Number	Customer Complaint	Service Explanation	Part Number	Part Quantity	Part Name
06/13/2018	CRL6VQ1KT		Capacitor blew out. Replaced and unit is now running.	3301000213#ICP	1	CAPACITOR

**RETURNS/EXCHANGE HISTORY**

# Warranty Types



**Standard Warranty**

**Preauthorization**

**Service Parts**

**Bulletin**

**Unit Exchange**

**Optional Contract**

- Standard Warranty – parts only coverage defined by the terms and conditions in the warranty certificate.
- Preauthorization – parts and/or labor concession approved by Technical Service team.
- Service Parts – a part that is sold over-the-counter (not provided under warranty) comes with a 12-month service part warranty.
- Bulletin – specific coverage defined in Service Bulletin to address known issue.
- Unit Exchange – complete unit replacement; (except for serialized accessory) requires Technical Service team approval or may be permitted by an Operating Letter or Bulletin.
- Optional Contract – coverage purchased on unit registered with warranty department (refer to OEW Dealer Program Guide for coverage).

# High Level Warranty Claim Process



SUN	MON	TUE	WED	THU	FRI	SAT
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

Payment file for claims approved Thurs. through Wed. is sent to SAP on Wednesday night.

SAP credit is issued to Distributor Friday Morning

- You have 90 days from the Date of Repair to submit the claim into ServiceBench®.
- A payment cycle runs each week.
- Approved claims submitted Thursday through Wednesday are processed on Wednesday night. Credit for these claims is issued to the distributor on Friday morning (the distributor is responsible for issuing credit to their Service Providers / Dealers).



# Creating a New Claim



The screenshot shows the ServiceBench web application interface. The top navigation bar includes tabs for HOME, CLAIMS (marked with a red circle '1'), CONTRACTS, REGISTRATIONS, REPORTS, and ADMIN. The left sidebar menu is expanded to show the CLAIMS MAIN section, with the Entitlement hyperlink (marked with a red circle '2') selected. The main content area displays the ENTITLEMENT SEARCH form, which includes fields for Model Number, Serial Number\* (containing 'A191060234', marked with a red circle '3'), First Name, Last Name, Phone, and Service Contract Number. Below these fields is a CHECK ENTITLEMENT section with fields for Install Date and Application Type. A red circle '4' is placed over the SEARCH ENTITLEMENT button at the bottom of the form.

1. Hover over the CLAIMS tab.
2. Click on the Entitlement hyperlink.
3. Enter the Serial Number.
4. Hit “Enter” or click on the SEARCH ENTITLEMENT button.

# Creating a New Claim



ServiceBENCH

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Product History

### ENTITLEMENT SEARCH

Service Administrator: United Technologies Corporation

Model Number: N9DSE0601714A

Serial Number\*: A191060234

First Name:

Last Name:

Phone:

Service Contract Number:

**CHECK ENTITLEMENT**

Install Date: 06/01/2019

Application Type: Owner Occupied Residential

Product Name: DOWNFLOW 95% GAS FURN 60K FOR MANF HOME

Model Number: N9DSE0601714A

Discrete Model Number: N9DSE0601714A1

Serial Number: A191060234

Owner:

Address:

Phone:

Distributor State: TN

Replacement Of Model(s):

Replacement Of Serial Number(s):

### Warranty Information

Brand	Application Type	Original Equipment Owner	Component Code	Warranty Length	Installed After	Warranty Start	Warranty Stop
ICP	ALL	ALL	Primary Heat Exch-Furnace	20 years	01/01/2019	06/01/2019	06/01/2039
			Standard Parts Warranty	5 years			06/01/2024

SEARCH ENTITLEMENT START NEW CLAIM NEW PRODUCT REGISTRATION

5. If the unit has not been registered, you will need to enter the Installation Date and Application Type.
6. Verify that the warranty for the part in question is still active (Note: Check Product History to avoid duplicate claims).
7. Click on the START NEW CLAIM button.
8. Enter the appropriate Service Provider ID or Account Number. (If your dealers are set up in the system you will use their ID or account. If your dealers are not set up, you will use your company's ID or account.)
9. Click SELECT SERVICE PROVIDER.

ServiceBENCH

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

### NEW CLAIM - ENTER A SERVICE PROVIDER

Either select the Service Administrator or Service Provider account number OR enter the ServiceBench Service Provider Id.

Service Administrator: UTC - United Technologies Corporation Account Number:

- or -

Service Provider ID:

SELECT SERVICE PROVIDER CANCEL

# Standard Claiming



The screenshot shows the ServiceBench 'WARRANTY CLAIM' form. The form is divided into several sections: 'CLAIM INFORMATION', 'EQUIPMENT INSTALLATION INFORMATION', and 'SERVICE DETAIL INFORMATION'. Red circles with numbers 10 through 16 are overlaid on the form, pointing to specific fields. 10 points to the Dealer Name field, 11 to the Model Number field, 12 to the Warranty Type dropdown, 13 to the Unit Installed/Startup Date field, 14 to the Equipment Owner Company Name field, 15 to the Application Type dropdown, and 16 to the Fail Date and Repair Date fields. The form also includes a navigation menu at the top with options like HOME, CLAIMS, CONTRACTS, REGISTRATIONS, REPORTS, and ADMIN. The breadcrumb trail shows 'Claim Inbox > Claim Review > Product History'. The form title is 'WARRANTY CLAIM'. The claim information section includes fields for Claim Number, Account Number, Claim Status (New), Claim Date (07/03/2019), Claim Submitted Date, and Amount Approved. The equipment information section includes fields for Manufacturer (Carrier - Carrier Corporation), Dealer (100202020 - BLEVINS INC), Dealer Location (1002020 - BLEVINS INC), Dealer Name (Quality Heating / AC), Dealer Address\* (21265 Prospect), City, State, Zip/Postal Code (Pleasantville IA 50225), Reference Number, Additional Reference Number, Model Number\* (N9DSE0601714A), Serial Number (A191060234), Warranty Type\* (Standard Warranty), Unit Installed/Startup Date (05/10/2019), and a note: '\*\*\*\* Hit the SAVE key to auto populate the unit registration information'. The service detail information section includes fields for Fail Date\* (06/25/2019) and Repair Date\* (06/27/2019).

10. Your dealer's information will be populated based on their account number
11. The Model Number\* and Serial Number carry over from the ENTITLEMENT SEARCH Screen
12. Select the Warranty Type\* (we will use Standard Warranty in this example)
13. Enter the equipment Installation Date\*
14. Complete the CUSTOMER INFORMATION\* section
15. Select the Application Type\* and indicate whether this is the Original Equipment Owner\*
16. Enter the Fail Date\* and the Repair Date\*

*\* If the equipment has been registered or a claim has been processed previously, many of these fields will be already populated.*

# Standard Claiming



<b>a</b> Causal Part	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition	Unit Price	<b>e</b> Part Mark Up	Part Price Ext
<input checked="" type="checkbox"/>	1	AQA038KAB	11AA11-A11		<input type="checkbox"/>	1	 AQA038KAB	COMPRESSOR, SCROLL	22BB22-B2222			0.00		
<input type="checkbox"/>	1	3301000213			<input type="checkbox"/>	1	 3301000213	CAPACITOR				0.00		
<input type="checkbox"/>					<input type="checkbox"/>									
<input type="checkbox"/>					<input type="checkbox"/>									

17

17. Complete a part line for each part being claimed for the repair.

- a) Only one part should be marked as the “Causal Part”. The Causal Part is the part that most likely caused the failure.
- b) “Failed/Replaced Part Serial Number” only needs to be completed if you are claiming a compressor. Otherwise, leave it blank.
- c) “Failed Part Install Date” should be left blank on Standard Warranty claims. It should only be completed when claiming Service Parts (more on this later).
- d) Use the magnifying glass to search for the proper Replaced Part Number.
- e) Leave Unit Price as it is.

After completing the parts section, click SAVE at the bottom of the claim.

# Standard Claiming



WARRANTY CLAIM

Claim Number: 18000001  
Account Number: 18000001  
Claim Status: New  
Claim Date: 07/03/2019  
Claims Submitted Date:  
Amount Approved:

**\*\* SAVE ERRORS \*\***

Code	Description	Detail Line
96	Defect Code Required.	
96	Diagnosis Required.	

**QUALITY INFORMATION**

Model Location:   
Gas Furnace Fuel:   
Component Code: C500  
Furnace Orientation:

Diagnosis  
Why was the service call made?  
What was found to be wrong?  
What was done to repair unit or correct problem?  
The compressor was grounded and the capacitor was blown. Replaced both and the unit is now operating.

Defect Code: C513 - Grounded

**Financial Section (Crossed out with a red X):**  
Total Fee: \$0.00  
Labor Hour:   
Labor Rate:   
Labor Total:   
Freight Amount:   
Refrigerant Amount:   
Service Materials Amount:   
Drive-Up Time:   
Drive-Up Amount:   
Diagnosis:   
Diagnostic:   
Admin Allowance:   
Handling Fee:

HoldB: NO

New Comment:  Internal

Buttons: NEW - SAME CUSTOMER, NEW - SAME REPAIR, SAVE, DELETE CLAIM, SUBMIT, SAVE COMMENT, PRINT

18. After you SAVE, you will see any claim errors that need to be addressed at the top of the claim screen
19. The Component Code will auto-populate based on the selection of the Causal Part
20. Provide a complete Diagnosis by answering the 3 questions
21. Select the appropriate Defect Code based on component code
22. You may enter a comment on the claim if there is any additional detail or explanation to provide
23. Do not enter anything in this section — it is not used for standard claims
24. Before you click SUBMIT:
  - click the SAVE button one last time — if there are any claim errors at the top of the claim screen, you will need to address them before submitting your claim
  - after you have reviewed the claim and addressed any errors, you can click SUBMIT

# Required Part Return Example



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Replacement Disposition Replacement Mark Up

Replacement Approved Amount Requested Replacement Amount

Number of Part Lines **2**

<input type="checkbox"/>	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	<input type="checkbox"/>	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition	Unit Price	Part Mark Up	Part Price Extended	Approved Amount
<input checked="" type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="340481-780"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>	<input type="text" value="1"/>	<input type="text" value="340481-786"/>	INVERTER KIT, 3T (V11)	<input type="text"/>	<input type="text" value="8507457"/>	Return				

Claim Error: NONE

**QUALITY INFORMATION**

# Parts Packing List Example



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HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

[Return to Claim](#)

## PACKING LIST

Packing List

**FROM** **TO**

CRM Services, Inc.  
10111 Technology Way  
Indianapolis, IN 46227

CARRIER CORPORATION  
ATTN SPECIAL REQUEST PARTS 7304 WEST MORRIS ST  
INDIANAPOLIS, IN 46231

Claim	Model	Model Serial Number	Unit Install/Startup Date	Failed Date
 CRM7DPL16	 25VNA836A003	 3618E03839	 09-OCT-2018	 10-JUL-2019

Claim Reference Number CRM7DPL16

Print on List?	Tracking Number	Carrier	Part Number	Invoice Number	Part Serial Number	Quantity	Part Description	Part, Part Serial Number, Quantity
<input checked="" type="checkbox"/>			340481-780#RCD			1	INVERTER KIT, 3T (V11)	 340481-786 1

Diagnosis (Service Performed) : NO COOL CALL. FOUND INVERTER NOT WORKING. REPLACED INVERTER

Distributor Location :

**3**

**GENERATE PRINTABLE VERSION**

# Standard Claim with DOA Labor



## 3.1.2 Residential Dead on Arrival (DOA) 1

**Introduction** This topic covers the DOA policy, as the policy applies to residential applications only, including:

- Background of the DOA Program
- Eligibility for the program
- Compensation allowances
- DOA Compressor Program
- Replacement processes, and
- **Minor residential component repair.**

**Background of the DOA Program** The DOA Program is a Company sponsored program not a warranty program. The program is

- Intended to provide relief to the channel and customers in the first 30 days in the event that the failure was caused by a manufacturing defect
- Not intended to cover poor installations or misapplications.
- Dealer participation in the DOA program is at the discretion of the distributor and is managed through the ServiceBench® warranty system.

**Eligibility** To be eligible for this program, an original component must fail within 30 days of initial start-up/installation in the finished goods equipment.

**Compensation Allowances** Compensation will be based on program allowance amounts.

Repair Type Description	CBP Program Allowance
DOA Minor Component	\$ 37.50
DOA Compressor AC HP SPP 1-5 Tons	\$ 325.00
DOA Primary Heat Exchanger	\$ 325.00
DOA Secondary Heat Exchanger	\$ 325.00
DOA SPP Heat Exchanger Aluminized Steel	\$ 325.00

*Continued on next page*

## 3.1.2 Residential Dead on Arrival (DOA), Continued

**Compensation Allowances, continued**

Repair Type Description	CBP Program Allowance
DOA SPP Heat Exchanger Stainless Steel	\$ 325.00
DOA Leak Repair Tubing	\$ 150.00
DOA Leak Repair Valves	\$ 150.00
DOA Leak Repair Coil 1-5 Tons	\$ 200.00

**Note:** Field Service Materials and Refrigerant are included in the program allowance amounts

## WARRANTY CLAIM

Claim Number	CRN1
Account Number	600598-60268
Claim Status	Paid
Claim Date	01/24/2020
Claim Submitted Date	01/24/2020

**Service Administrator Information section**  
 Warranty Policy Code: DLS Part Multiplier: 328  
 Plan ID:

**Manufacturer** UTC - United Technologies C  
**Dealer**  
**Distributor**  
**Reference Number**  
**Model Number\*** 38MF0017--3  
**Serial Number** 1515V  
**Warranty Type \*** Standard Warranty  
 \*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

**EQUIPMENT INSTALLATION INFORMATION**  
**Equipment Owner Company Name**  
**Installation Owner First Name**  
**Installation Address\***

Claim Error: NONE

**QUALITY INFORMATION**  
**Model Location** [dropdown]  
**Gas Furnace Fuel** [dropdown]  
**Labor Repair Type \*** [dropdown]  
**Diagnosis \***  
 Why was the service call made?  
 What was found to be wrong?  
 What was done to repair unit or correct problem?  
 [text area]

**Defect Code \***

NO DOA LABOR

DOA MINOR COMPONENT

DOA PRIMARY HEAT EXCHANGER

DOA LEAK REPAIR COIL 1 - 5 TONS

---

DOA LEAK REPAIR VALVES

---

DOA COMPRESSOR AC HP SPP 1 - 5 TONS

---

SECONDARY HEAT EXCHANGER

DOA LEAK REPAIR TUBING

Item	Requested	Approved
<b>Total Parts</b>	\$0.00	
Labor Hours		0.0
Labor Rate		
Labor Amount		
Out of Warranty - Labor		
Tax Amount(For U.S Claims Only)		

*Start a Standard claim as you normally would through Entitlement (see pages 23-27).*

1. **“3.1.2 Residential Dead on Arrival (DOA)”** policy is from the Service Providers Manual (aka, SPM) found on HVACpartners.
2. Repair Type Descriptions and Allowances are found in this table.
  - Minor residential component repair is \$37.50 paid to the Distributor; however, the Dealer gets reimbursed \$75.00.
3. In the QUALITY INFORMATION section of the ServiceBench claim, for **Labor Repair Type\***, select the appropriate DOA code from the drop down list.

2

3

# Bulletin Claim



**WARRANTY CLAIM**

Claim Number  
Account Number  
Claim Status: New  
Claim Date: 07/03/2019  
Claim Submitted Date  
Amount Approved

\*\* PAPER CLAIM \*\* [NO]

Manufacturer: CARRIER - Carrier Corporation  
Dealer: H0200028 - BLEVINS INC  
Dealer Location: H0200028 - BLEVINS INC  
Distributor: [Dropdown]  
Distributor Location: [Dropdown]  
Dealer Name: Quality Heating / AC  
Dealer Address\*: 21265 Prospect  
City, State, Zip/Postal Code: Pleasantville IA 50225  
Reference Number: [Field]  
Additional Reference Number: [Field]  
Model Number\*: N9DSE0601714A  
Serial Number: A191060234  
Warranty Type\*: Bulletin  
Unit Installed/Startup Date: 05/10/2019

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

**EQUIPMENT INSTALLATION INFORMATION**

Equipment Owner Company Name: [Field]

**SERVICE CALL INFORMATION**

Fail Date\*: 06/25/2019  
Repair Date\*: 06/27/2019  
Optional Contract Number: [Field]  
CCS/DSO Job Number: [Field]  
Operating Letter Number: [Field]  
Bulletin/Authorization Number: SB180010A  
Credit Card Payment: [Checkbox]  
\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial fields  
Replacement Model Number: [Field]  
Replacement Serial Number: [Field]  
Replacement Invoice Number: [Field]  
Replacement Unit Price: [Field]  
Replacement Disposition: [Field]  
Replacement Mark Up: [Field]  
Replacement Approved Amount: [Field]  
Requested Replacement Amount: [Field]  
Number of Part Lines: 4

Failed  
Failed  
Failed Part  
Failed Part  
Replaced  
Replaced  
Replaced  
Replaced Part  
Replaced Part

Start a claim as you normally would through Entitlement (see pages 23-25); below are the things you need to be aware of that are different from entering a “standard” claim.

1. Select Bulletin as Warranty Type; review bulletin claiming instructions if applicable
2. Enter the applicable Bulletin Number

Note: Specific claiming instructions will be provided on the Bulletin depending upon the issue; be sure to only claim what is covered according to the service bulletin.

# Preauthorization Claim



**WARRANTY CLAIM**

Claim Number: 1182087  
Account Number: 1182087  
Claim Status: New  
Claim Date: 07/03/2019  
Claim Submitted Date: 07/03/2019  
Amount Approved: [ ]

\*\* PAPER CLAIM \*\* [NO]

Manufacturer: CARRIER - Carrier Corporation  
Dealer: 11820870208 - BLEVINS INC  
Dealer Location: 1182087 - BLEVINS INC  
Distributor: [ ]  
Distributor Location: [ ]

Dealer Name: Quality Heating / AC  
Dealer Address\*: 21265 Prospect  
City, State, Zip/Postal Code: Pleasantville IA 50225

Reference Number: [ ]  
Additional Reference Number: [ ]

Model Number\*: N9DSE0601714A  
Competitive Equipment: [ ]

Serial Number: A191060234  
Stock Unit: [ ]

Warranty Type\*: Preauthorization  
Unit Installed/Startup Date: 05/10/2019

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

**EQUIPMENT INSTALLATION INFORMATION**

Equipment Owner Company Name: [ ]

**SERVICER DETAIL INFORMATION**

Fail Date\*: 06/25/2019  
Repair Date\*: 06/27/2019

Optional Contract Number: [ ]  
CCS/DSO Job Number: [ ]

Operating Letter Number: [ ]

Bulletin/Authorization Number: TB123456  
Credit Card Payment: [ ]

\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial fields

Replacement Model Number: [ ]  
Replacement Serial Number: [ ]

Replacement Invoice Number: [ ]  
Replacement Unit Price: [ ]

Replacement Disposition: [ ]  
Replacement Mark Up: [ ]

Replacement Approved Amount: [ ]  
Requested Replacement Amount: [ ]

Number of Part Lines: 4

*Start a claim as you normally would through Entitlement (see pages 23-25); below are the things you need to be aware of that are different from entering a “standard” claim.*

On rare occasions you may find it necessary to reimburse the service provider for a part or labor that is not covered under warranty. On these rare occasions these warranty claims will need to be handled through the empowerment process. Contact the technical service advisor at your distributorship for instructions and approval.

1. Select Preauthorization as Warranty Type; be sure the claim matches the detail on the Authorization
2. The authorization # MUST match (if possible, copy/paste)

**BEST Practice:** Start claim and save prior to authorization, so that the approver can copy Servicer, Model/Serial and Part Detail if applicable directly from the claim, to avoid discrepancy.

# Unit Exchange Claim



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## WARRANTY CLAIM

1920007 - BLEVING INC 421 WARD LN NASHVILLE, TN 37216-0307 UNITED STATES		Claim Number Account Number Claim Status Claim Date Claim Submitted Date Amount Approved
--	--	---

\*\* PAPER CLAIM \*\* NO

Manufacturer: CARRIER - Carrier Corporation  
Dealer: 192000008 - BLEVING INC Dealer Location: 1920007 - BLEVING INC  
Distributor: Distributor Location:   
Dealer Name: Quality Heating / AC  
Dealer Address\*: 21265 Prospect  
City, State, Zip/Postal Code: Pleasantville IA 50225  
Reference Number: Additional Reference Number:   
Model Number\*: N9DSE0601714A  Competitive Equipment  
Serial Number: A191060234  Stock Unit  
Warranty Type\*: Unit Exchange Unit Installed/Startup Date: 05/10/2019

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

### EQUIPMENT INSTALLATION INFORMATION

Equipment Owner Company Name: \_\_\_\_\_

### SERVICE DETAIL INFORMATION

Fail Date*: 06/25/2019	Repair Date*: 06/27/2019
Optional Contract Number: _____	CCS/DSO Job Number: _____
Operating Letter Number: _____	<input type="checkbox"/> Credit Card Payment
Bulletin/Authorization Number: _____	***** If the unit has been replaced fill in the New Model and Serial fields
Replacement Model Number: N9DSE0601714A	Replacement Serial Number: A191060340
Replacement Invoice Number: _____	Replacement Unit Price: _____
Replacement Disposition: _____	Replacement Mark Up: _____
Replacement Approved Amount: _____	Requested Replacement Amount: _____
Number of Part Lines: 4	

Failed Failed Part Replaced Replaced Replaced

Start a claim as you normally would through Entitlement (see pages 23-25); below are the things you need to be aware of that are different from entering a “standard” claim.

1. Select Unit Exchange as Warranty Type
2. Enter the Replacement Model Number
3. Enter Replacement Serial Number

Note: The Warranty Type will auto-correct to Unit Exchange when a Replacement Model and Serial Number is entered. If filing against an Optional Contract, be sure to enter the Dealer’s Cost of the Replacement unit. Also, do not enter anything on the part lines.

# Service Parts Claim



Claim Number  
Account Number  
Claim Status  
Claim Date  
Claim Submitted Date  
Amount Approved

\*\*\* PAPER CLAIM \*\* [NO]

Manufacturer: CARRIER - Carrier Corporation  
Dealer: 18202028 - BLE-INS INC  
Dealer Location: 18202028 - BLE-INS INC  
Distributor: [blank]  
Distributor Location: [blank]

Dealer Name: Quality Heating / AC  
Dealer Address\*: 21265 Prospect  
City, State, Zip/Postal Code: Pleasantville IA 50225

Reference Number: [blank] Additional Reference Number: [blank]  
Model Number\*: N9DSE0601714A **2**  
Serial Number: A191060234 **1**  
Warranty Type\*: Service Parts  
Unit Installed/Startup Date: 05/10/2019

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

**EQUIPMENT INSTALLATION INFORMATION**

Equipment Owner Company Name: [blank]

Fail Date\*: 06/25/2019 Repair Date\*: 06/27/2019  
Optional Contract Number: [blank] CCS/DSO Job Number: [blank]  
Operating Letter Number: [blank]  
Bulletin/Authorization Number: [blank]  Credit Card Payment  
\*\*\*\*\* If the unit has been replaced fill in the New Model and Serial fields  
Replacement Model Number: [blank] Replacement Serial Number: [blank]  
Replacement Invoice Number: [blank] Replacement Unit Price: [blank]  
Replacement Disposition: [blank] Replacement Mark Up: [blank]  
Replacement Approved Amount: [blank] Requested Replacement Amount: [blank]  
Number of Part Lines: 4

Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition
1	1185268		6/27/2019	<input type="checkbox"/>	1	1185268	CAPACITOR			

Start a claim as you normally would through Entitlement (see pages 23-25); below are the things you need to be aware of that are different from entering a “standard” claim.

A Service Parts claim is when the unit is out of the manufacturer’s warranty. The part was purchased “over-the-counter” and receives a one year part warranty from the date it was installed.

1. Warranty Type must be Service Parts
2. Competitive Equipment box must be marked if the part was installed in a competitor unit
3. Failed part install date must be entered on the part line

Note: Refer to Parts Operational Manual (POM20-416 / POM File: 416 / Replacement Components Service Parts Warranty) for special coverage on Factory Authorized Parts.

# Optional Contract Claim



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## WARRANTY CLAIM

987654-31194 - TEST DEALER - DO NOT DELETE  
7310 W MORRIS ST  
INDIANAPOLIS, IN 46231-1355 UNITED STATES  
317-243-0851

Claim Number: 987654-31194  
Account Number: 987654-31194  
Claim Status: Pending  
Claim Date: 10/31/2019  
Claim Submitted Date: 10/31/2019  
Amount Approved: \$10.49

\*\* PAPER CLAIM \*\*  NO

Manufacturer: UTC - United Technologies Corporation  
Dealer: 884957968 - TEST DEALER - DO NOT DELETE  
Dealer Location: 987654-31194 - TEST DEALER - DO NOT DELETE  
Distributor: [Dropdown]  
Distributor Location: [Dropdown]

Reference Number: [Field]  
Model Number\*: 24ABB342A0N3  Competitive Equipment  
Serial Number: 2718E1  Stock Unit  
Warranty Type\*: Optional Contract  Unit Installed/Startup Date: 09/05/2018

\*\*\*\* Hit the SAVE key to auto populate the unit registration information

### EQUIPMENT INSTALLATION INFORMATION

Equipment Owner Company Name: [Field]  
Installation Owner First Name: [Field] Installation Owner Last Name: [Field]  
Installation Address\*: [Field] Address Line 2: [Field]  
City, State/Province, Postal Code\*: [Field]  
Country\*: UNITED STATES  
Email: [Field]  
Phone 1: [Field] Phone 2: [Field]  
Application Type: Owner Occupied Residential Original Equipment Owner: [Dropdown]

### SERVICE DETAIL INFORMATION

Fail Date\*: 10/10/2019 Repair Date\*: 10/11/2019  
Optional Contract Number: FLH2215  CCS/DSO Job Number: [Field]  
Bulletin/Authorization Number: [Field]  Credit Card Payment

\*\*\*\* If the unit has been replaced fill in the New Model and Serial fields

Replacement Model Number: [Field] Replacement Serial Number: [Field]  
Replacement Invoice Number: [Field] Replacement Unit Price: [Field]  
Replacement Disposition: [Field] Replacement Mark Up: [Field]  
Replacement Approved Amount: [Field] Requested Replacement Amount: [Field]  
Number of Part Lines: 4

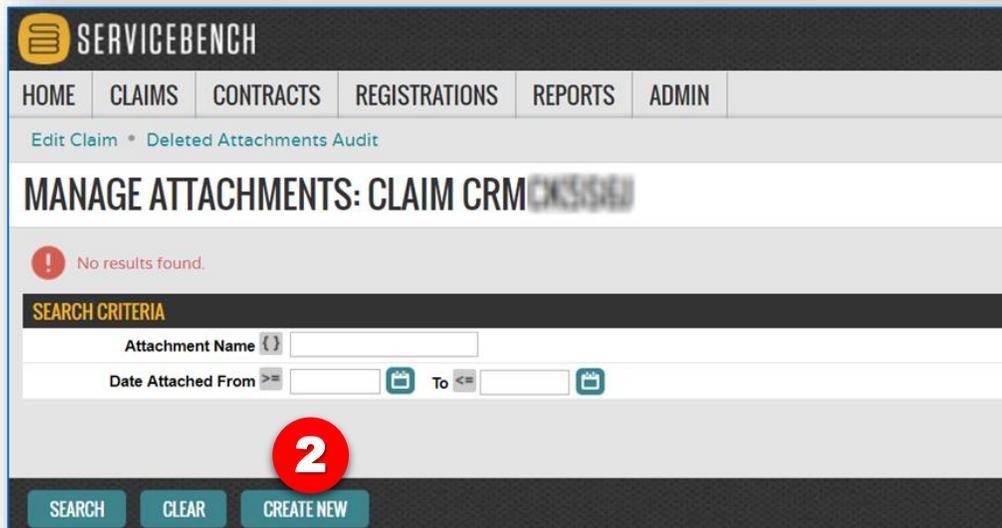
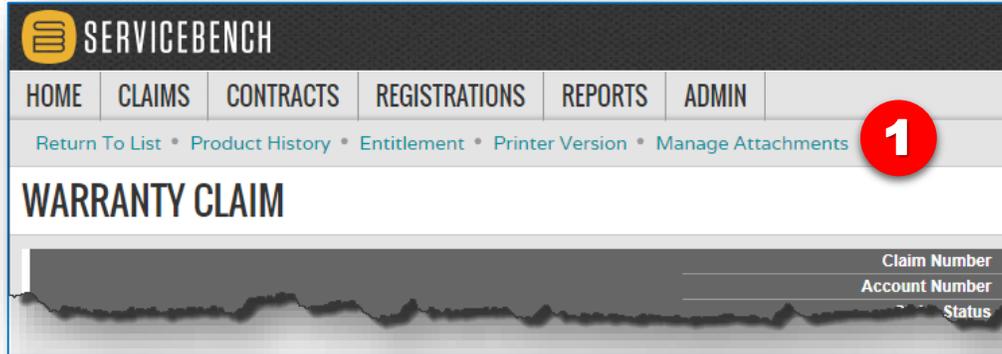
?	Causal Part	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	?	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition	Unit Price
<input checked="" type="checkbox"/>		1	P291-8074R			<input type="checkbox"/>		1	P291-8074R#RCD			1234567890		10.49

Start a claim as you normally would through Entitlement (see pages 23-25); below are the things you need to be aware of that are different from entering a “standard” claim.

1. Select Optional Contract as Warranty Type
2. Enter the appropriate OEW Contract Number
3. Always enter the Dealer’s Purchase Price

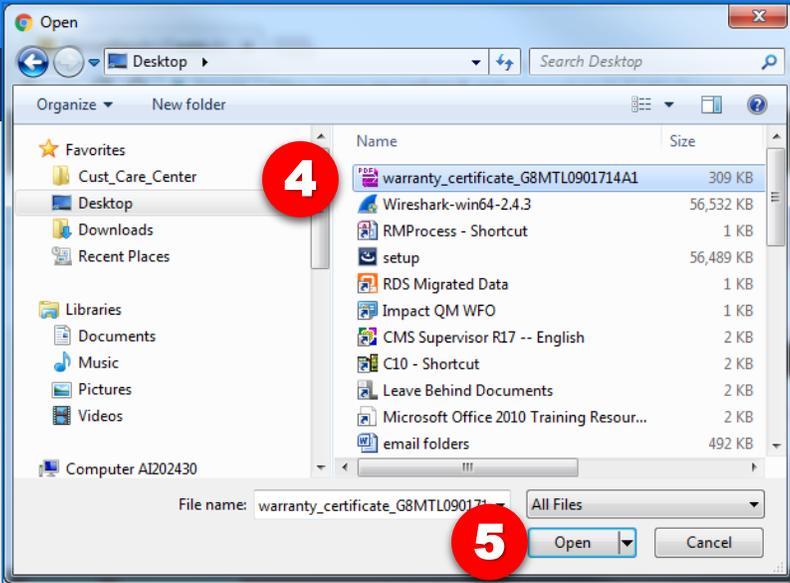
Note: This process only applies for Contracts sold by Carrier prior to 2013. For Contracts purchased after 2013 through a 3<sup>rd</sup> party vendor, contact information can be found on the Entitlement screen.

# Attaching Documents to Claims

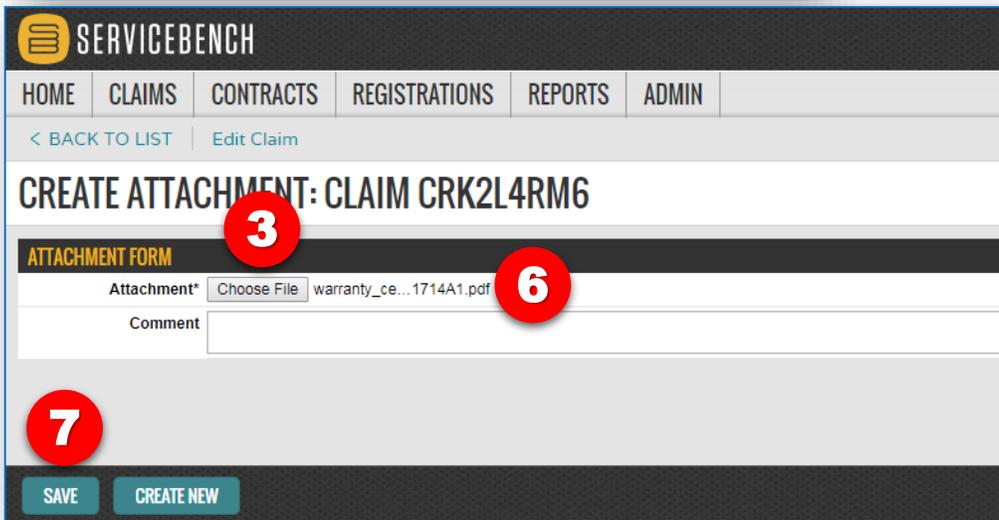


1. Click Manage Attachments link at the top of the claim form.
2. Click CREATE NEW button.

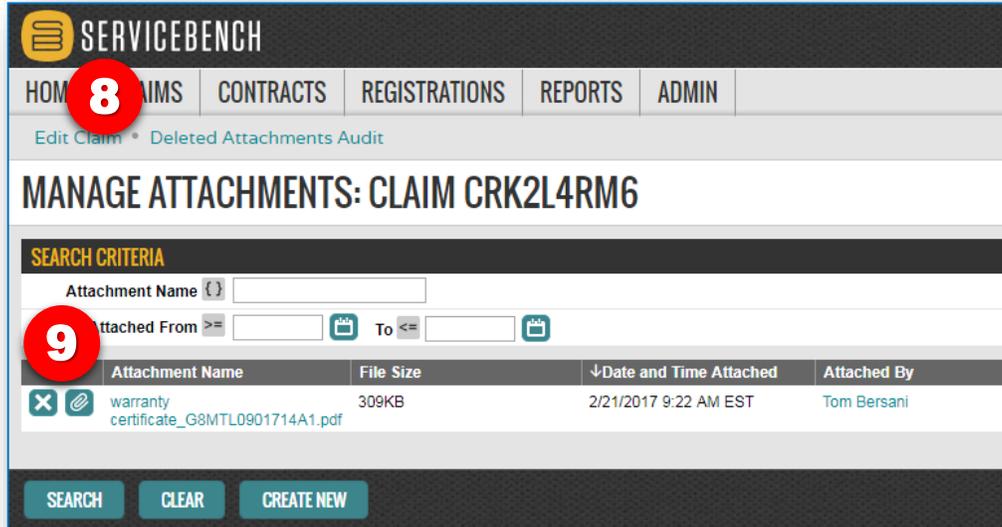
# Attaching Documents to Claims



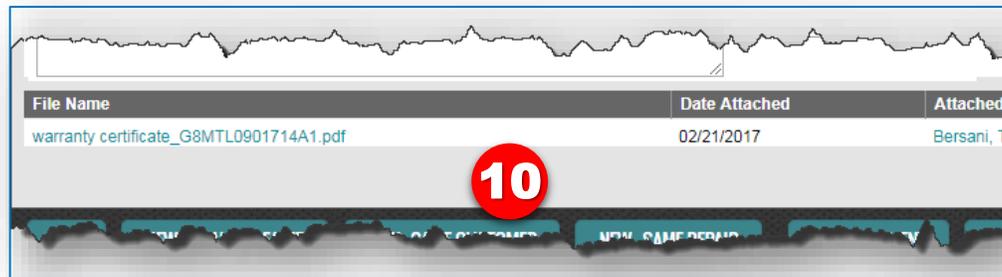
3. Click on Choose File button
4. Select your file from your computer.
5. Click Open.
6. You should see your file name here.
7. Click SAVE.



# Attaching Documents to Claims



8. Confirmation that document has been attached; note you can view the attachment by clicking the paperclip icon, or you can delete the attachment by clicking the “X”.
9. Click on the Edit Claim link.
10. The attachment will be a link at the bottom of the claim.





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## WARRANTY CLAIM

<b>Claim Number</b>	CRM6VVDZW
<b>Account Number</b>	10020028
<b>Claim Status</b>	Requires Review
<b>Claim Date</b>	06/19/2019
<b>Claim Submitted Date</b>	06/19/2019
<b>Amount Approved</b>	\$669.69

**1**

\*\* PAPER CLAIM \*\* NO

Reject Code \*  Select Reject Code  Reject Text

**Service Administrator Information section**

Warranty Policy Code: ICPN9DSE Part Multiplier: .325

Plan ID:  Plan Type:

Review Items

38 - Always review claims for this operating letter. **2**

\*\*\*\*\*

**Manufacturer** CARRIER - Carrier Corporation

**Dealer** 10020028 - BLE/INS INC **Dealer Location** 10020028 - BLE/INS INC

**Distributor** 10020028 - BLE/INS INC **Distributor Location** 10020028 - BLE/INS INC

**Dealer Name** Quality Heating / AC

**Dealer Address\*** 21265 Prospect

**City, State, Zip/Postal Code** Pleasantville IA 50225

**Reference Number** CRM6VVDZW **Additional Reference Number**

**Model Number\*** N9DSE0601714A  Competitive Equipment

**Serial Number** A191060234  Stock Unit

1. Claim number, status, amount, etc.
2. Reason for review.

# Claim Submittal



Item	Requested	Approved
<b>? Total Parts</b>	\$0.00	\$494.69
Labor Hours	<input type="text"/>	0.0
Labor Rate		
Labor Amount		<input type="text" value="175.00"/>
Freight Amount	<input type="text"/>	<input type="text"/>
Refrigerant Amount		<input type="text"/>
Service Materials Amount	<input type="text"/>	<input type="text"/>
Drive-Up Time	<input type="text"/>	
Drive-Up Amount		<input type="text"/>
Diagnostic Hours	<input type="text"/>	
Diagnostic Amount		<input type="text"/>
Admin Allowance Amount		<input type="text"/>
Handling Fee	<input type="text"/>	
<b>Total Amount</b>	\$0.00	\$669.69
<b>Total Paid Amount</b>		
<b>Service Amount</b>		\$0.00
<b>Distributor Amount</b>		\$669.69

3. Claim reimbursement categories (found at the bottom of the claim screen).

3



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## WARRANTY CLAIM

	<b>4</b>	Claim Number	CRK2L4WRL
		Account Number	198382
		Claim Status	Rejected
		Claim Date	02/20/2017
		Claim Submitted Date	02/20/2017
		Amount Approved	
		Date Rejected	02/20/2017
		Rejected By	System

Reject Code \* 04 - Out of Warranty **5** Reject Text Out of Warranty - Parts/Labor. \*\* PAPER CLAIM \*\* NO

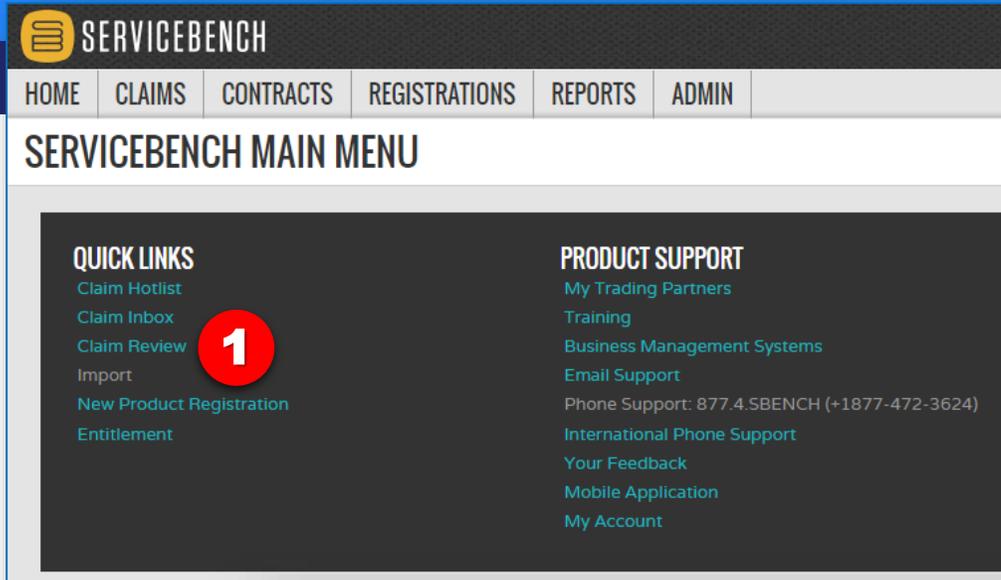
- 4. Claim status = Rejected
- 5. Reason for Rejection

# Warranty Claim Status



- **PAID** — Claim has been approved and reimbursement has been made to the distributor.
- **APPROVED** — Claim has been approved and waiting to be processed through the weekly payment cycle; (typical payment cycle = claims approved Thurs thru Wed are paid on Friday).
- **REQUIRES REVIEW** — Claim has been sent to either the distributor or Carrier for review and disposition.
- **REJECTED** — Claim did not meet all of the system (policy) validations or lacked required information.
- **CORRECTED** — Rejected claim has been resubmitted on a different claim number.
- **SAVED** — Claim has been initiated by dealer or distributor but has not been submitted.
- **CLOSED** — Claim remained in a SAVED status for more than 120 days; system automatically closed the claim.

# Checking Claim Status



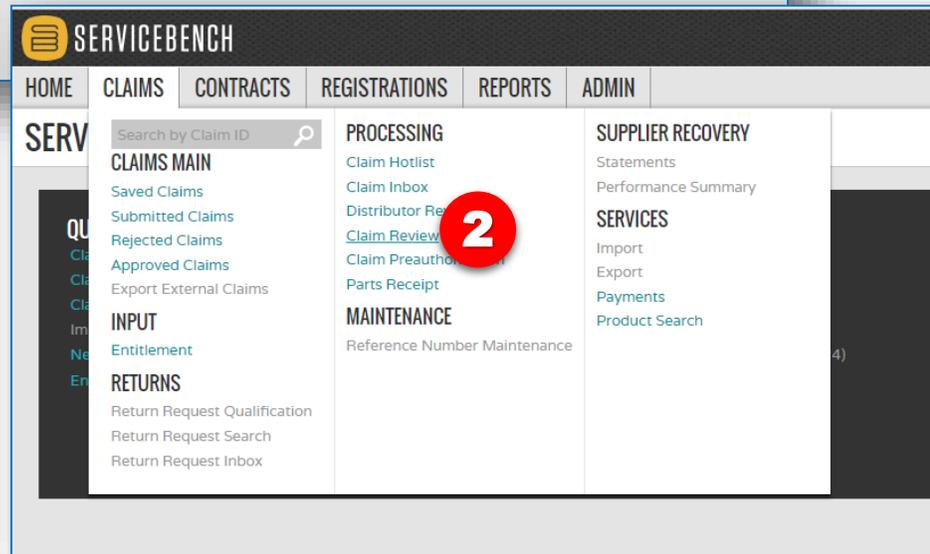
Claim Review - is used for locating and managing claims. You can insert up to 5 claim numbers (separated by a semicolon [;]) for a basic search. You can search for all claims based on entered criteria, not just those in review status. Claims can be located by using either the serial number, claim number, or reference number. In this example, the search was based on the claim number.

1. Click on Claim Review link Under QUICK LINKS on the home page dashboard.

OR

2. Hover over the CLAIMS tab, and click on the Claim Review hyperlink.

OR



# Checking Claim Status



The screenshot shows the ServiceBench interface for checking claim status. The page title is "CLAIM REVIEW". Below the title, there is a navigation bar with "HOME", "CLAIMS", "CONTRACTS", "REGISTRATIONS", "REPORTS", and "ADMIN". Underneath, there are links for "Claim Hotlist", "Claim Inbox", "By Consumer", and "Advanced Search". The main section is titled "CLAIM REVIEW" and contains a form with the following fields:

- Service Administrator:** UTC - United Technologies Corporation
- Serial Number:** (empty field)
- Claim Number(s):** CRHA3N1VA
- Reference Number(s):** (empty field)
- Transaction Number(s):** (empty field)

At the bottom of the form is a "SEARCH" button. Red circles with numbers 3, 4, 5, and 6 are placed over the Serial Number, Claim Number(s), Reference Number(s), and SEARCH button respectively. Red arrows point from these circles to the corresponding fields or button.

3. Search by Serial Number (one at a time).
4. Search by Claim Number (up to 5 at a time, separated by semicolon).
5. Search by Reference Number (up to 5 at a time, separated by semicolon).
6. Click SEARCH.

# Checking Claim Status



**SERVICEBENCH**

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Claim Hotlist • Claim Inbox • By Consumer • Advanced Search

## CLAIM REVIEW

To find claims based on additional fields, use the Advanced Search Link above

Service Administrator UTC - United Technologies Corporation

Serial Number

Claim Number(s) CRHA3N1V4

Reference Number(s)

Transaction Number(s)

### Search Results

	Service Provider	Account Number	Service Provider Location	Claim Number	Reference Number	Claim Type	Status
	837326645 - Hampton Mechanical Inc	13158-31200	Hampton Mechanical Inc	CRHA3N1V4	CRHA3N1V4	Warranty	Paid

SEARCH

From the Search Results, you can view a specific claim by clicking the eye icon. If a pencil icon displays you can access and edit the claim.

7. View the claim by clicking on the “Eyeball”.

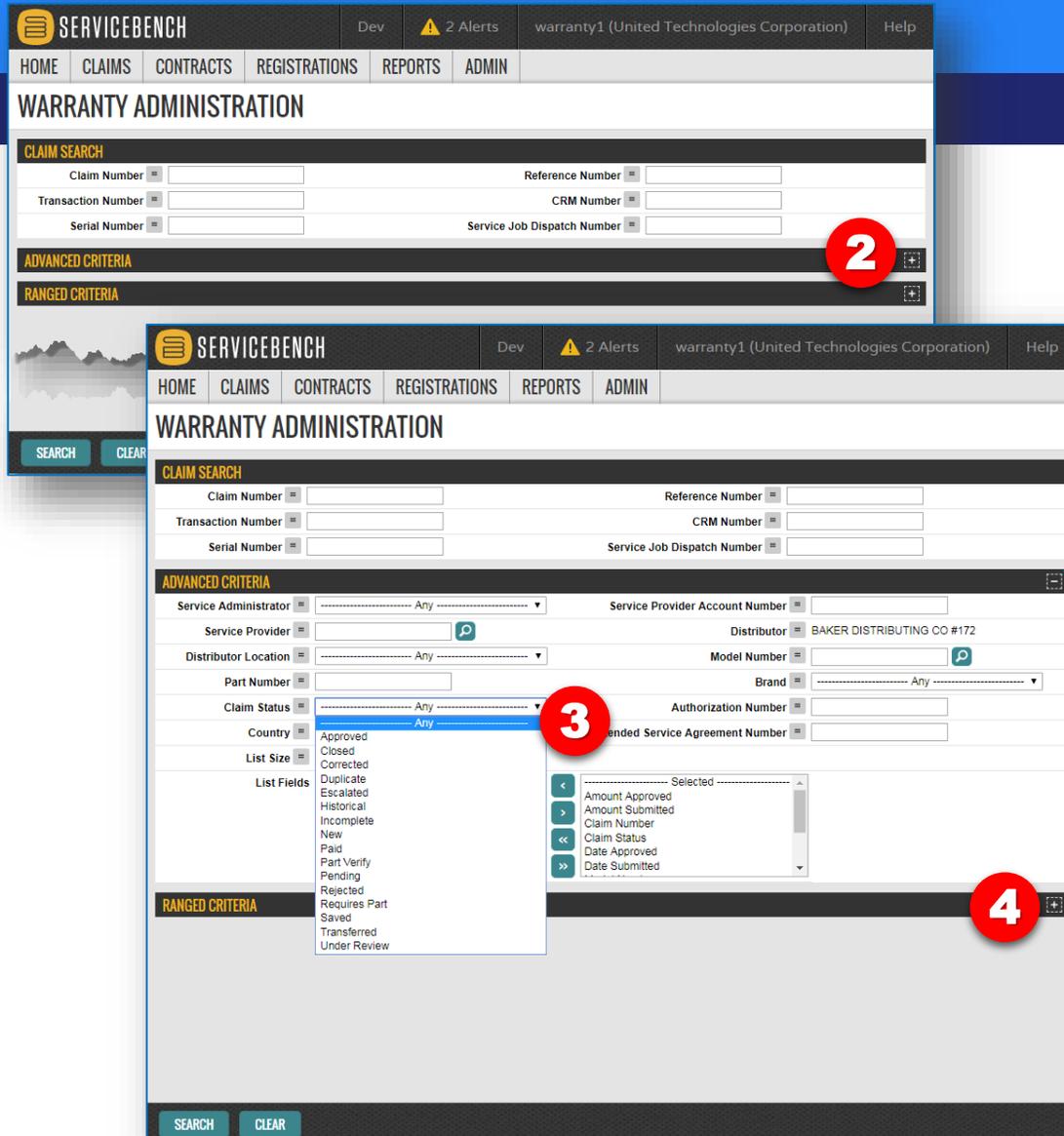
# Claim Review—Advanced Search

A screenshot of the ServiceBench web application interface. At the top left is the ServiceBench logo. Below it is a navigation menu with tabs for HOME, CLAIMS, CONTRACTS, REGISTRATIONS, REPORTS, and ADMIN. A breadcrumb trail shows "Claim Hotlist" > "Claim Inbox" > "Advanced Search", with a red circle containing the number "1" over the "Advanced Search" link. The main heading is "CLAIM REVIEW". Below this is a sub-heading: "To find claims based on additional fields, use the Advanced Search Link above". The search form includes several input fields: "Service Administrator" (a dropdown menu with "Any" selected), "Serial Number", "Claim Number(s)", "Reference Number(s)", and "Transaction Number(s)".

Advanced Search allows you to search in greater detail by using multiple criteria such as: Service provider, Model number, Part number, Claim status, Date ranges, Authorization number, Bulletin number. You may search by any combination of criteria and also customize how you want the results to be displayed.

1. Click on the Advanced Search hyperlink.

# Claim Review—Advanced Search



2. Expand the ADVANCED CRITERIA section by clicking on the “+”.
3. You have the option of narrowing down different search fields that are currently listed as “----Any----”; In the Claim Status drop down, you can query by a particular claim status. Note: You could review all of your Service Provider’s saved claims using this method. Saved Claims will be deleted after 120 days. These claims can be deleted or edited and completed by clicking on pencil icon, correcting any claim requirements / discrepancies that may exist and then submitting.
4. Expand the RANGED CRITERIA section by clicking on the “+”.

# Claim Review—Advanced Search



5

6

7

5. You have the option of changing the fields you want to see in your search (click on a field and use the blue arrows to move to “Selected” section, etc.).
6. You can select a specific date range or leave it open.
7. Click on the SEARCH button.

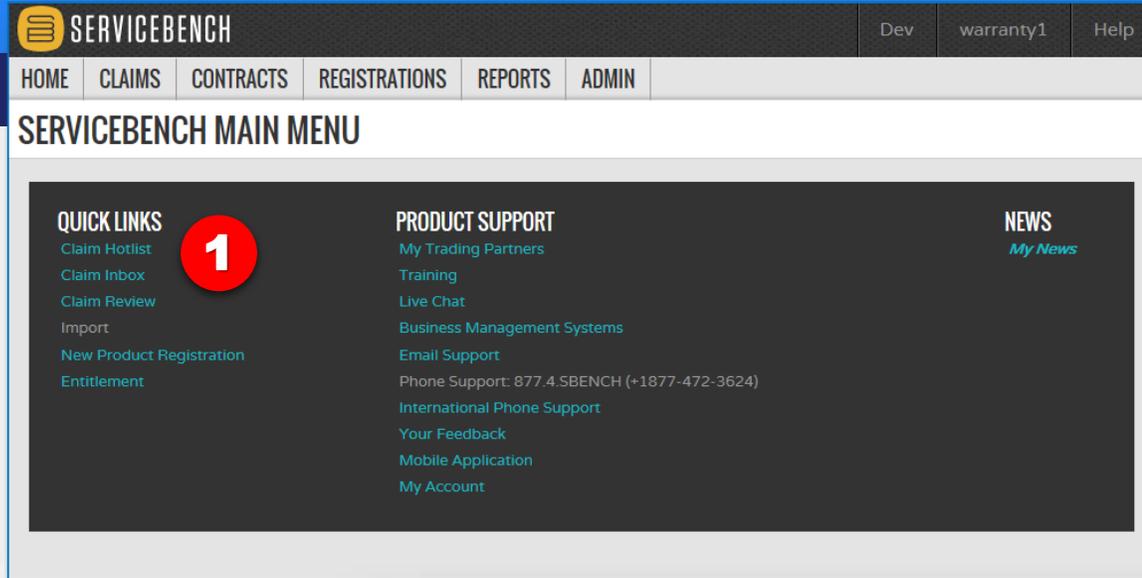
# Claim Review—Advanced Search



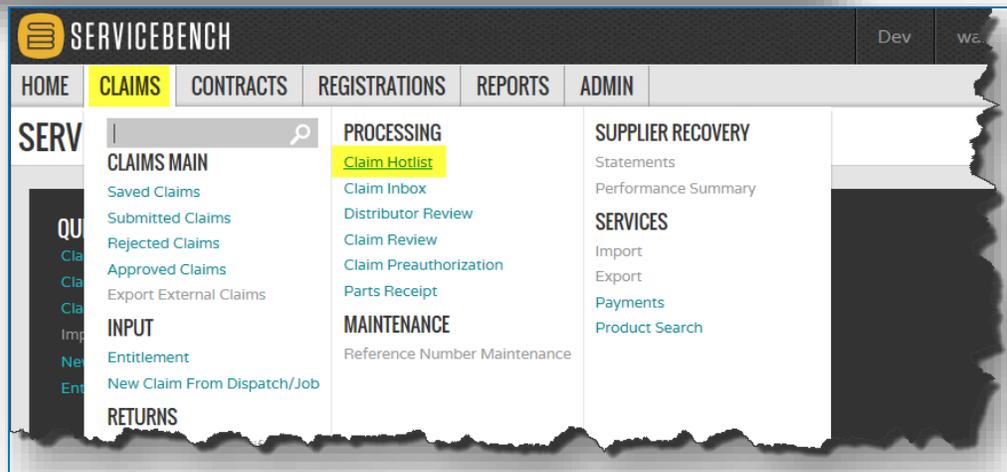
Claim Number	Service Provider	Service Provider Account Number	Serial Number	Model Number	Reference Number	Claim Status	Date Submitted	Amount Submitted	Date Approved	Amount Approved
CRL4VNYKV	642873696 - CASH SALE 172	435172-111224	1804A13607	DLFSDAH18XAK#ICP	CRL4VNYKV	Saved				
CRL4VNYMG	642873696 - CASH SALE 172	435172-111224	1804A13607	DLFSDAH18XAK#ICP	CRL4VNYMG	Saved				

8. A list of the claims matching your selected criteria will be shown.

# Claims in Saved Status



1. To view Saved claims, click on the [Claim Hotlist](#) link under the QUICK LINKS section of the SERVICEBENCH MAIN MENU, or hover on the CLAIMS tab and select the [Claim Hotlist](#) link



# Claims in Saved Status



Account Number

ServiceBench ID  Name

Status

City  State/Province

Country

SEARCH

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

SERVICE PROVIDER SELECTION

Account Number	ServiceBench ID	Name	City	State/Province	Country
✓ 110132-593030	1001256168	A & C HEATING & AIR LLC	DELTA	AL	UNITED STATES
✓ 110132-593030	1001350223	LANEY AIR CONDITIONING CO. INC	ANNISTON	AL	UNITED STATES
✓ 1097258-593030	1001350879	THE STEWART PERRY CO	BIRMINGHAM	AL	UNITED STATES
✓ 109941-593030	1001350885	J & M HOME SUPPLY	ELKTON	TN	UNITED STATES
✓ 107258-593030	1001354685	LAKESIDE HEAT & AIR	WEDOWEE	AL	UNITED STATES
✓ 110132-593030	1001364920	SOUTHERN COMFORT HEATING & AC	JACKSONVILLE	AL	UNITED STATES
✓ 110769-593030	1001381114	DOYAL CONTRACTORS INC	ONEONTA	AL	UNITED STATES
✓ 108608-593030	1001392814	JOHNSON CONTROLS	HOOVER	AL	UNITED STATES
✓ 102924-593030	1001393781	ADVANCED MECHANICAL SERVICES	ORLANDO	FL	UNITED STATES
✓ 110522-593030	1001399449	CAMPBELL HEATING & AIR CONDITIONING	JACKSONVILLE	AL	UNITED STATES

SEARCH CLEAR

Page 1 of 131

2. If you know the Account Number, Name, etc., you can enter it in the appropriate field(s) and SEARCH. Otherwise, hit SEARCH to select the appropriate Account from your company's SERVICE PROVIDER listing.
3. Click on the check mark next to the appropriate Account.

# Claims in Saved Status



## CLAIM HOTLIST

Service Administrator UTC - United Technologies Corporation Service Provider [REDACTED]

Reference Number  Authorization Number

	Claim Number	Reference Number	Claim Type	Status	Claim Date	Amount Submitted
 	CRM5C45FL	635226	Warranty	Saved	05/17/2019	
 	CRM6D5B18	6373651	Warranty	Saved	06/24/2019	

4

4. Click pencil icon to open claim for completion.

# Claims in Distributor Review



## Distributor Service Provider Profile



### Explanations for Distributor Editable Fields

Field name	Explanation
Invoice Required	If this field is set to YES, the claim submitter will be required to enter the invoice number of the replacement part that was purchased
Return All Parts	If this field is set to YES, the service provider will receive a message to return all failed parts on a claim; they should be returned to the distributor
Authorization Required for Unit Exchange	If this field is set to YES, the distributor will be required to create a preauthorization anytime a complete unit exchange is claimed
Distributor Review Standard Claims	If this field is set to YES, any claim with a warranty type of STANDARD will be routed to the distributor for additional review and disposition
Always Review Preauthorization Claims	If this field is set to YES, any claim with a warranty type of PREAUTHORIZATION will be routed to the distributor for additional review and disposition
Distributor Review Service Part Claims	If this field is set to YES, any claim with a warranty type of SERVICE PART will be routed to the distributor for additional review and disposition
Distributor Review Bulletin Claims	If this field is set to YES, any claim with a warranty type of BULLETIN will be routed to the distributor for additional review and disposition

1. Hover over the CLAIMS tab.
2. Click on the Distributor Review hyperlink.

Images are for illustration purposes only; model number(s), serial number(s) may not be applicable to your business. ServiceBench® and the ServiceBench logo are registered trademarks of Asurion, LLC. Presentation and training material developed by the Warranty Process Team\_Nov\_2019

# Claims in Distributor Review



ServiceBENCH

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Claim Inbox \* Claim Review \* Claim Review Import

### CLAIM DISTRIBUTOR REVIEW

Service Administrator: Any

Claim Submit Date From: [ ] To: [ ]

Service Provider State(s)/Province(s): [ ] Account Number: [ ] Service Provider: [ ]

Service Provider Location: [ ] Reference Number: [ ] Serial Number: [ ] ALL

Authorization Number: [ ] Last Modified Date: [ ]

Auto Approved: ALL

Review Codes: [ ]

Country: [ ]

Exclude Account Numbers: [ ]

Exclude Warranty Type Codes: [ ]

**3**

SEARCH

3. Click on SEARCH to display all claims requiring your review.

# Claims in Distributor Review



Service Administrator	Claim Number	Model Number	Serial Number	Authorization Number	Date Submitted	Account Number	Region Code	Country	Amount Submitted	Review Codes	Last Modified Date
United Technologies Corporation	CRK2VHVKG	WCA3364GKA	X122668874		02/15/2017	16960-111224	VK	UNITED STATES	56 - Failed Serial Syntax does not match	Failed Part	26-MAY-2017
United Technologies Corporation	CRK2VHWNV	R2A336GKR	X132975077		02/23/2017	16960-111224	VK	UNITED STATES	56 - Failed Serial Syntax does not match	Failed Part	23-FEB-2017
United Technologies Corporation	CRK2VHWNX	WCA3482GKR	X132975076		02/23/2017	16960-111224	VK	UNITED STATES	56 - Failed Serial Syntax does not match	Failed Part	23-FEB-2017

4. Reason the claim is in distributor review queue.

5. Click on the “pencil” icon to access the claim screen.

# Claims in Distributor Review



**SERVICEBENCH** Dev 2 Alerts warranty1 Help

HOME CLAIMS CONTRACTS REGISTRATIONS REPORTS ADMIN

Next In List \* Return To List \* Product History \* Printer Version \* Manage Attachments

### WARRANTY CLAIM

746802598 - HENSLEY'S A/C & REFRIGERATION 1096 WILLIAMSON CREEK RD PISGAH FOREST, NC 28768-9579 UNITED STATES 1848.877-5217	Claim Number: CRK2VHVKG Account Number: 16960-111224 Claim Status: Requires Review Claim Date: 02/15/2017 Claim Submitted Date: 02/15/2017 Amount Approved:
--	--

Reject Code \*  Select Reject Code  Reject Text

Approval Code \*  Approval Text

**Service Administrator Information section**

Warranty Policy Code: IPLSS1010 Part Multiplier:   
Plan ID:  Plan Type:   
Review Items Group: And

56 - Failed Serial Syntax does not match Failed Part **6**

Manufacturer: UTC - United Technologies Corporation  
Dealer: 746802598 - HENSLEY'S A/C & REFRIGERATION Dealer Location: 746802598 - HENSLEY'S A/C & REFRIGERATION  
Distributor: 565770959 - BAKER DISTRIBUTING CO #172 Distributor Location: 111224 - BAKER DISTRIBUTING CO #172

Reference Number: CRK2VHVKG Additional Reference Number:   
Model Number: WCA3364GKA Competitive Equipment:   
Serial Number: X122668874 Stock Unit:   
Warranty Type: Standard Warranty Unit Installed/Startup Date: 08/15/2013

\*\*\*\*\* Hit the SAVE key to auto populate the unit registration information

### EQUIPMENT INSTALLATION INFORMATION

Equipment Owner Company Name:

Replacement Approved Amount:  Requested Replacement Amount:   
Number of Part Lines: 4

Causal Part	Failed Part Quantity	Failed Part Number	Failed Part Serial Number	Failed Part Install Date	Competitor Part	Replaced Part Quantity	Replaced Part Number	Replaced Part Description	Replaced Part Serial Number	Replaced Part Invoice Number	Part Disposition	Unit Price
<input checked="" type="checkbox"/>	1	ZP29K5EPFV130	4528196B718 <b>7</b>		<input type="checkbox"/>	1	ZP29K5EPFV830	COMP ZP29K5E-PPV-830	15D62A09L			0.00

Claim Error: NONE

New Comment:  Internal

**8**

NEW - SAME CUSTOMER NEW - SAME REPAIR SAVE SUBMIT SAVE COMMENT REJECT PRINT

6. Reason the claim is in distributor review queue.

7. Make the necessary correction (i.e., correct the serial number).

8. Click SUBMIT button.



**Claims may come to Carrier review but it doesn't necessarily mean your claim is going to be rejected. Claims may be reviewed for a number of reasons:**

- **Quality Directed**
  - Repeat repairs on a serial number (multiple claims within a specified time period)
  - Excessive repairs on a serial number (more than X number of claims)
  - Multiple failures on a specific part
  - Repeat repair by a different servicer
- **Program / Policy Directed**
  - Bulletin requirements
  - Optional Extended Warranty
  - 100% Satisfaction Guarantee
- **Financial Control Directed**
  - Shelf Life
  - Total claim amount greater than allowed maximum
  - Use of competitive parts
  - Service parts on competitive equipment
  - Labor only
- **Data Driven**
  - Missing costs
  - Incorrect / invalid part usage
  - Failure date to repair date threshold exceeded

# Salesforce Warranty Claim Related Tasks



# Salesforce Warranty Claim Related Tasks



**Customer Gateway** Logged in as Debbie Bell (dbell@mcgregorfr.com) Sandbox PartUAT

Home Submit Case Reports Dashboards Chatter Ticketing Tool Cases

**Recent Items**

- Task CRL51XX5S Testing Task By TDJ
- 01235691
- 01235676
- documentation needed
- please supply docs
- Invoice needed
- CRM2VSYTM

**Messages and Alerts**

**Dashboard** Refresh

As of 9/19/2018 11:39 AM. Displaying data as Debbie Bell

**Cases Submitted by me**

**My Open Cases**

**Cases assigned to me** Create Case

Case #	Account Name	Flag	Subject	Case Type	Status	Priority	Dealer Account Number	Completed	Purpose	Sub-Purpose
01233631	McGregor Fr. - Norcross		Test Prod Reg	Product Registration	Open	Medium		<input type="checkbox"/>	General Correction	
01223224	McGregor Fr. - Norcross		Test	Product Registration	Open	Medium		<input type="checkbox"/>	Keying Error	
01222802	McGregor Fr. - Norcross		Test	Product Registration	Open	Medium		<input type="checkbox"/>	Different Homeowner	
01221412	McGregor Fr. - Norcross		Testing Prod Reg	Product Registration	Open	Medium		<input checked="" type="checkbox"/>	General Correction	
01221061	McGregor Fr. - Norcross		Testing Closed Cases- Please Ignore	Product Registration	Closed	Medium		<input type="checkbox"/>	Subsequent Homeowner	

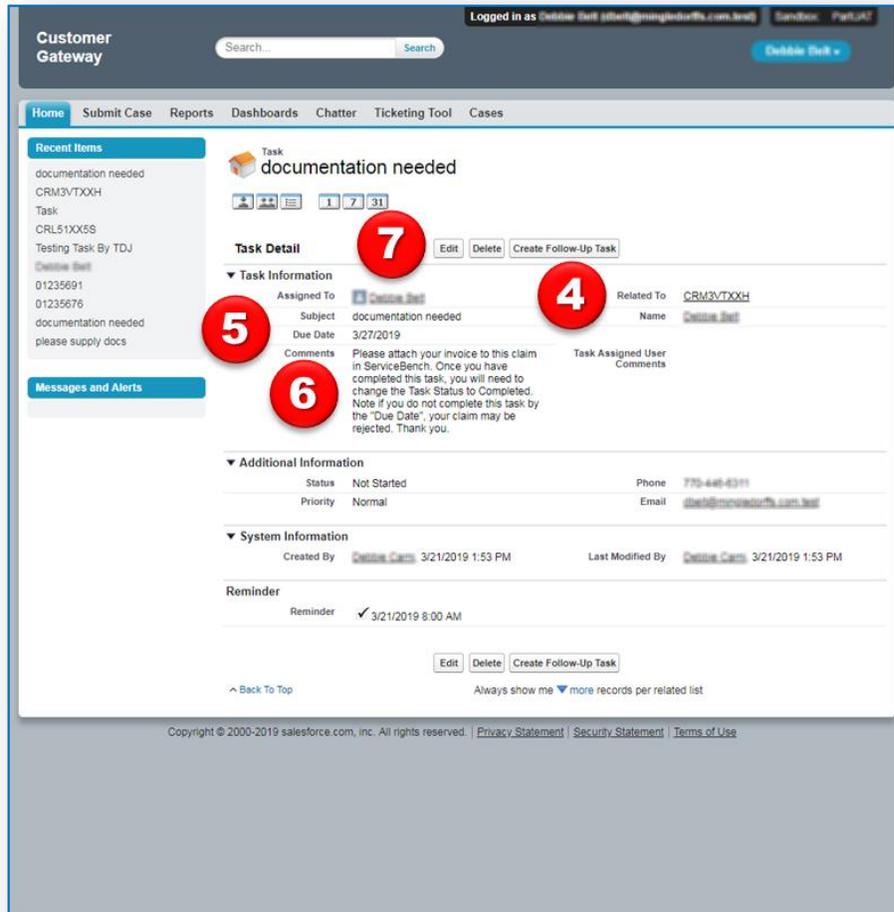
**My Tasks** New All Open

Complete	Date	Status	Subject	Name	Related To	Account
X	9/26/2018	Not Started	Task	Debbie Bell	01224490	McGregor Fr. - Norcross
X	3/10/2019	Not Started	Task	Debbie Bell	CRL51XX5S	McGregor Fr. - Norcross
			documentation needed	Debbie Bell	CRM3VTXXH	McGregor Fr. - Norcross

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1. When a **Task** has been assigned to you, you will receive an email notification.
2. You can also view all of your open **Tasks** in Salesforce on the **My Tasks**, **All Open** applet on your **Home** screen.
3. To view a **Task**, you should click on the **Subject** hyperlink.

# Salesforce Warranty Claim Related Tasks



You will want to note the following **Task Detail**:

4. Your ServiceBench® Claim Number will be found in the **Related To** field.
5. There is a **Due Date** for each **Task** we assign to you (6 days).  
**Note:** Each **Claim-related Task** will need to be completed prior to the **Due Date**; otherwise your ServiceBench® **Claim** may be rejected.
6. The **Task Comments** will tell you what we need in order to process your company's Claim that is currently in our ServiceBench® Review Queue.
7. Once you have completed the **Task** assigned to you, you can click on the **Edit** button; this will open the **Task Edit** screen.

# Salesforce Warranty Claim Related Tasks



Customer Gateway

Logged in as Debbie Bell (dbell@servicebench.com) London, PA, US

Home **11** Reports Dashboards Chatter Ticketing Tool Cases

Recent Items

- documentation needed CRM3VTXXH Task CRL51XX5S Testing Task By TDJ
- Debbie Bell
- 01235691
- 01235676
- documentation needed
- please supply docs

Messages and Alerts

### Task Edit

Save Save & New Task Cancel

Task Information

Assigned To: Debbie Bell Related To: Warranty Claim CRM3VTXXH

Subject: documentation needed Name: Contact Debbie Bell

Due Date: 3/27/2019 [3/27/2019]

Comments: Please attach your invoice to this claim in ServiceBench. Once you have completed. Task Assigned User Comments: I have attached the documents to the Claim in ServiceBench as requested. **8**

Additional Information

Status: Not Started **9**

Priority: In Progress Completed Waiting on someone else Deferred

Reminder: 3/21/2019 8:00 AM

**10** Save Save & New Task Cancel

Attachments

Attach File

No records to display

Always show me more records per related list

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8. You can supply any additional comments for us here if needed (not required).
9. Select the dropdown arrow for **Status** and select "Completed".
10. Click **Save**; once you have completed your **Task** we will receive an automated notification.
11. You can now click on your **Home** tab to return to your main Salesforce screen.

# Salesforce Warranty Claim Related Tasks



The screenshot shows the Salesforce Customer Gateway interface. At the top, it says "Logged in as Debbie Bell" and "Part L4". The navigation bar includes "Home", "Submit Case", "Reports", "Dashboards", "Chatter", "Ticketing Tool", and "Cases". The dashboard displays "Cases Submitted by me" (a bar chart) and "My Open Cases" (a pie chart). Below the charts is a table of cases assigned to the user. At the bottom, there is a "My Tasks" section with a table of tasks. A red circle with the number 13 is overlaid on the "My Tasks" section, and a red circle with the number 12 is overlaid on the "Complete" column of the table.

Case #	Account Name	Flag	Subject	Case Type	Status	Priority	Dealer Account Number	Completed	Purpose	Sub-Purpose
01233631	Warranty	Test	Product Reg	Product Registration	Open	Medium		<input type="checkbox"/>	General Correction	
01233264	Warranty	Test	Product Reg	Product Registration	Open	Medium		<input type="checkbox"/>	Keying Error	
01222809	Warranty	Test	Product Reg	Product Registration	Open	Medium		<input type="checkbox"/>	Different Homeowner	
01221412	Warranty	Testing Prod Reg	Product Registration	Product Registration	Open	Medium		<input checked="" type="checkbox"/>	General Correction	
01221061	Warranty	Testing Closed Cases-Please Ignore	Product Registration	Product Registration	Closed	Medium		<input type="checkbox"/>	Subsequent Homeowner	

Complete	Date	Status	Subject	Name	Related To	Account
X	9/26/2018	Not Started	Task	Debbie Bell	01224490	Warranty
X	3/10/2019	Not Started	Task		CRL51XXSS	Warranty

- The **Task** you just completed has now been removed from your **My Tasks, All Open** applet on your **Home** screen in Salesforce.
- You also have the option to close any task listed in your **My Tasks, All Open** applet on your **Home** screen by clicking on an “X” in the **Complete** column. Clicking on the “X” will take you the **Edit Task** screen (as shown on the previous page).

# Reject Override Function for Distributors



# Reject Override Function for Distributors



The screenshot shows the ServiceBench interface for a warranty claim. At the top, there are navigation tabs: HOME, CLAIMS, CONTRACTS, REGISTRATIONS, REPORTS, and ADMIN. Below these are links for 'View Original Claim', 'Related Claims', 'Claim Inbox', 'Claim Review', 'Product History', 'Printer Version', and 'Manage Attachments'. The main heading is 'WARRANTY CLAIM'. A table displays claim details: Claim Number, Account Number, Claim Status (Approved), Claim Date (10/16/2019), Claim Submitted Date (01/16/2020), Amount Approved (\$211.50), and Date Approved (01/16/2020). A red circle with the number '1' is placed over the 'Claim Status' field. Below the table, there is a 'Reject Code' dropdown and a 'Reject Text' input field. The 'Service Administrator Information section' includes fields for Warranty Policy Code (DLS1), Part Multiplier, Plan ID, Plan Type, Manufacturer (UTC - United Technologies Corporation), Dealer, Dealer Location, Distributor, Distributor Location, Reference Number, Model Number\* (40MHQ12--3), Serial Number (D118V), Warranty Type\* (Unit Exchange), and Unit Installed/Startup Date (06/11/2018). A note says '\*\*\*\* Hit the SAVE key to auto populate the unit registration information'. Below this is the 'EQUIPMENT INSTALLATION INFORMATION' section with fields for Equipment Owner Company Name, Installation Owner First Name, Installation Owner Last Name, Installation Address\*, and Address Line 2. At the bottom, there are buttons for 'NEW - SAME CUSTOMER', 'NEW - SAME REPAIR', 'SAVE COMMENT', 'REJECT', and 'PRINT'. A red circle with the number '2' is placed over the 'REJECT' button.

1. Distributors now have the ability to “Reject” a Claim in ServiceBench® that is in an “Approved” status.
2. If the claim is in “Approved” status, you should see a REJECT button at the bottom of the claim; click REJECT.

# Reject Override Function for Distributors



The screenshot displays the ServiceBench interface for a warranty claim. At the top, there is a navigation bar with 'HOME', 'CLAIMS', 'CONTRACTS', 'REGISTRATIONS', 'REPORTS', and 'ADMIN'. Below this is a breadcrumb trail: 'View Original Claim \* Related Claims \* Claim Inbox \* Claim Review \* Product History \* Printer Version \* Manage Attachments'. The main heading is 'WARRANTY CLAIM'. A table shows claim details: Claim Number, Account Number, Claim Status (Approved), Claim Date (10/16/2019), Claim Submitted Date (01/16/2020), Amount Approved (\$211.50), and Date Approved (01/16/2020). Below the table, a dropdown menu for 'Reject Code' is open, showing a list of codes from 00 to 18. A red circle with the number '3' is placed over the dropdown list. To the right of the dropdown is a 'Reject Text' input field, which is highlighted with a red circle and the number '4'. Below the dropdown and text field are sections for 'Plan Type', 'Dealer Location', 'Distributor Location', 'Competitive Equipment', 'Stock Unit', and 'Unit Installed/Startup Date' (06/11/2018). At the bottom, there is a section for 'EQUIPMENT INSTALLATION INFORMATION'.

3. You will be prompted to enter a reason code, and
4. You will have a text field to explain the reason for rejection that will stay at the top of the claim.

**Important Step:** When using this functionality please keep in mind that you will need to contact us when the claim involves Unit Exchange. The units listed on the claim will need to be unlinked and released once the claim has been rejected.

**Note:** We encourage you to also make a note in the Comment section of the claim for your Dealers/Service Providers to see as well (be sure to click the SAVE COMMENT button at the bottom of the claim).

# Reject Override Function for Distributors



The screenshot shows the ServiceBench web application interface. At the top, there is a navigation bar with the ServiceBench logo and a user profile 'warranty1' with a 'Help' link. Below the navigation bar are tabs for 'HOME', 'CLAIMS', 'CONTRACTS', 'REGISTRATIONS', 'REPORTS', and 'ADMIN'. The main content area displays a claim form with various input fields and a table of amounts. A red circle with the number '5' is overlaid on the 'REJECT' button in the bottom navigation bar.

Field	Value
Refrigerant Price per lb.	
Refrigerant Amount	0.00
Service Materials Amount	0.00
Drive-Up Time	
Drive-Up Amount	0.00
Diagnostic Hours	
Diagnostic Amount	0.00
Admin Allowance Amount	0.00
Handling Fee	0.00
<b>Service Amount</b>	\$0.00
<b>Distributor Amount</b>	\$211.50

Click SAVE to save a draft of the claim. Click Submit to process the claim.

HoldB: NO

Audit Date: 01/16/2020 | User: Submitted | Action: Submitted

Buttons: NEW - SAME CUSTOMER, NEW - SAME REPAIR, SAVE COMMENT, REJECT, PRINT

5. Click the REJECT button.

**Note:** It is important to keep in mind your internal Accounts Receivable system when using this function if credits are automatically generated when a claim is approved in ServiceBench®.

# Best Practices





- Make sure required claim information is complete and accurate.
- Use the entitlement screen to start the claiming process.
- Utilize the product history page to confirm claim activity associated with a model / serial number.
- Claims should be submitted within 90 days of repair date to avoid rejection. (Note: Utilize Rejected Claim Detail Report; we allow 60 days from date of rejection to re-submit corrected claims.)
- Add claim comments to communicate relevant information or unusual circumstances.
- Use the magnifying glass search tool to confirm model and part numbers.

# Claiming Tips and Best Practices



- If Repair Date is more than 90 days greater than Failed Date entered on claim, please provide detail in the Description explaining the cause for delay in making repairs.
- Provide a complete description of service performed in the space provided.
  - Poor example – “broke, fixed it”
  - Better example – “Prop fan out of balance, hub seized to motor shaft”
  - Best example — review image →

**QUALITY INFORMATION**

Model Location  Furnace Orientation

Gas Furnace Fuel

Labor Repair Type \*  Component Code \*

**Diagnosis \***  
Why was the service call made?  
What was found to be wrong?  
What was done to repair unit or correct problem?  
REASON FOR CALL: Unit making loud noise at condenser. Homeowner stated that the unit was cooling.  
DIAGNOSIS: Checked filters. Checked tstat wiring and programming. Found outdoor fan motor making winding noise intermediately. Ofm was excessively hot for nighttime.  
REPAIR: Checked electrical components and refrigerant levels. Unit is running within manufacturer specifications. Disconnected the comp from the contactor to identify that it was the ofm making the noise. Ordering new condenser motor and fan blade.  
RESULTS AFTER REPAIR: Unit is cooling. Ordering new condenser fan motor and fan blade. Homeowner has no other questions or concerns at this time.  
Thank you for using [REDACTED] Four generations of family pride serving Arizona since 1942. / REMOVED AND REPLACED

Defect Code \*



- Do not enter a failed part install date (on the part item line) unless required. The only time a failed part install date is required is when the warranty type is Service Parts.
- For Compressor failures, both the failed and replacement compressor serial numbers are required to complete the claim.
- Be sure to watch out for Compressor Serial Syntax errors; contact us for help when needed.
- Review Company Policy prior to submitting a Claim or Email for help with a Claim that has a Part Error Message. For example:
  - If your claim has an error related to an “Invalid Component” check first to see if the part is excluded from the limited parts warranty (even if the part is found in EPIC as a valid part for that unit).

# Contact and Support



# Contact and Support



## Claim questions / Help

Open and submit a Case via Salesforce Gateway Community

**Carrier Support Line 1-866-989-2524**



ALL

PRODUCTS & SOLUTIONS	MARKETING TOOLS	<b>SUPPORT CENTER</b>	LEARNING CENTER	ORDER MANAGEMENT	ADMIN
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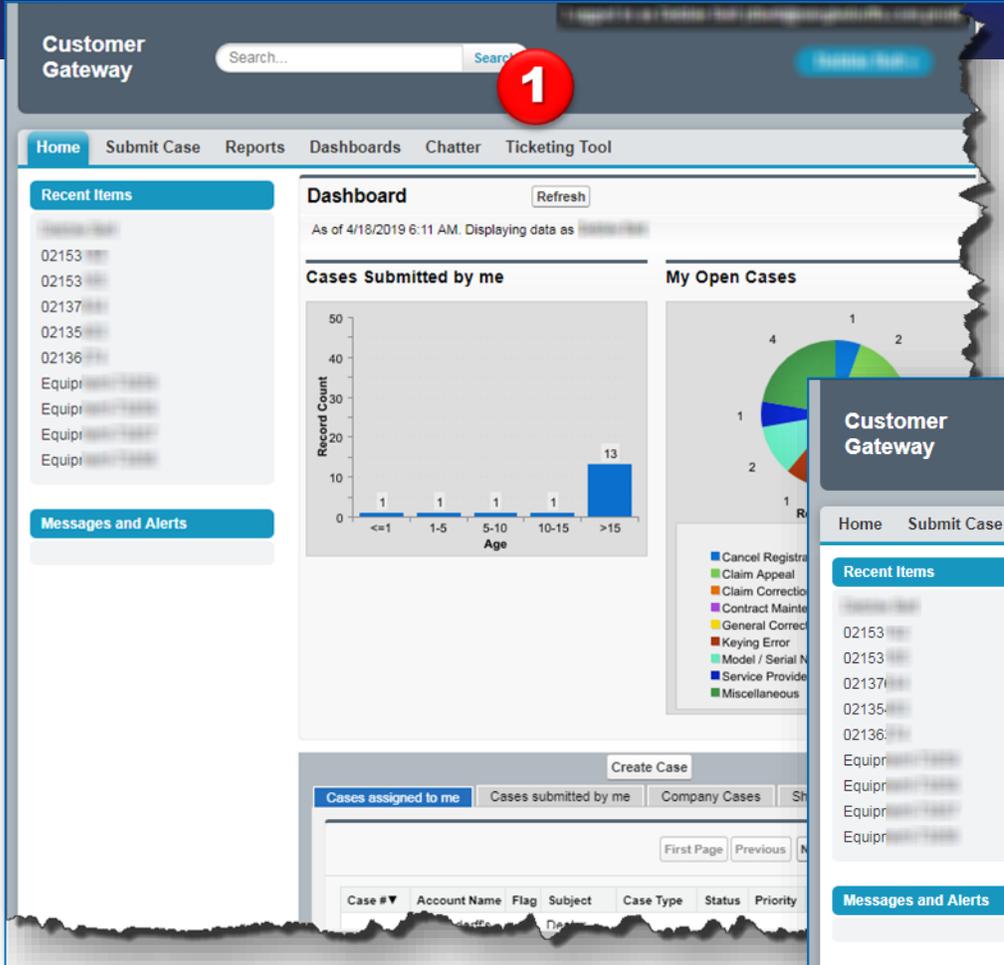
Credit Request (A5554)	<b>Warranty</b>	Contacts	Literature
Claims Submission	ServiceBench	Contact Directory	Product Literature
Pre-Sale Support	Warranty Training	Bryant Solution Center	Customer Care Center
Product Bulletins	Geothermal Warranty	Carrier Expert Central	Meetings / Presentations
Controls Support	Administration Policy & Procedures	Customer Gateway Web Case Submission	Steering Committee
Controls Product Information	Warranty Communications	Product Contact Lists	Tim Neeley Service Award
Controls Training	Commercial Services & DSO	Technical Service Managers	User Guides & Training Material
Controls Sales & Marketing	<b>Post-Sale Support</b>	<b>Policies &amp; Procedures</b>	RC Community
Controls Contacts	Bulletins	DOM	
	Customer Gateway	Order Management Policy	
	Post Sale Forms & Procedures	Parts Operations Manual	
	Recall Database	Standard Work Instructions	
	Post Sale Webcasts	Commercial Pricing Home Page	

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Presentation and training material developed by the Warranty Process Team\_Jan2020

# Ticketing Tool in Salesforce

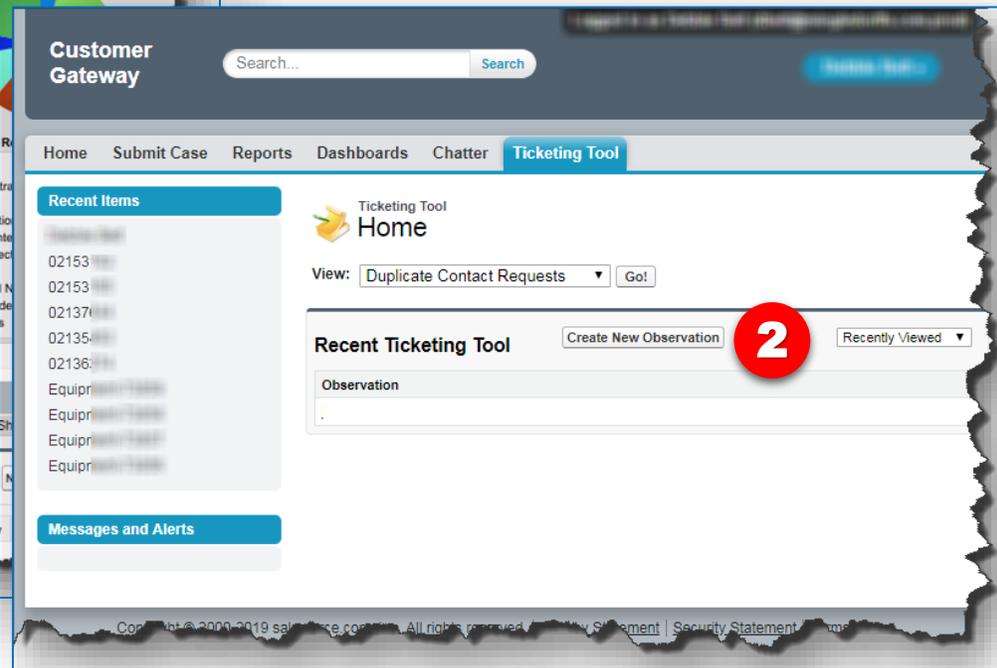


# Ticketing Tool in Salesforce

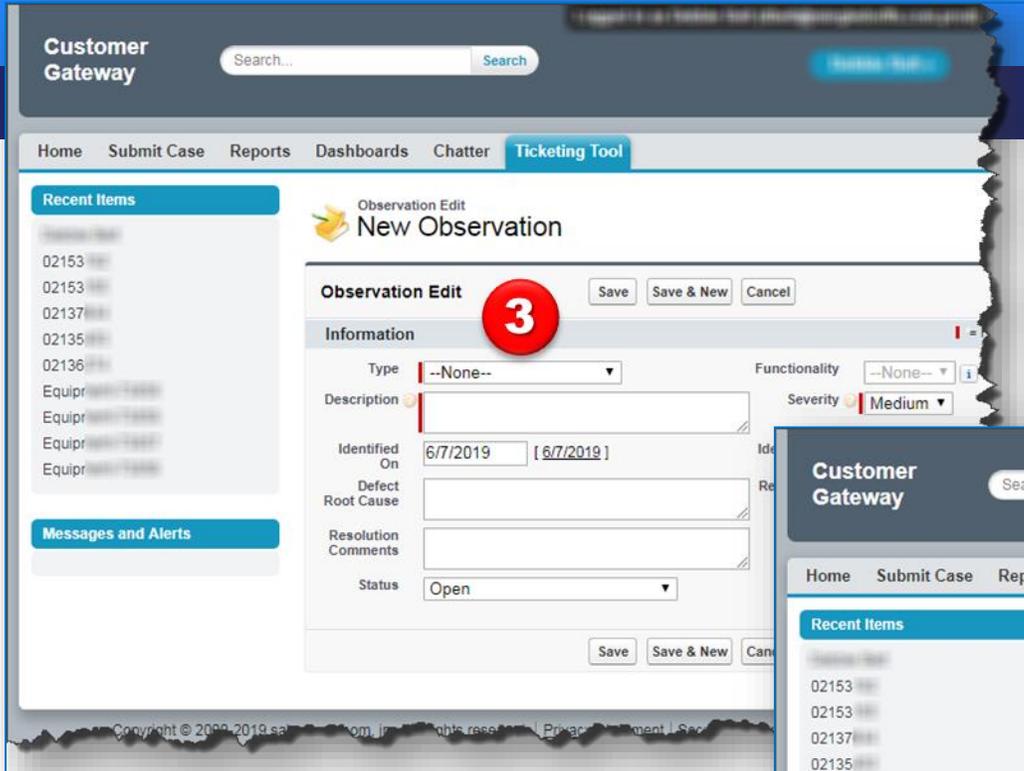


Please use the Ticketing Tool to submit your request when adding new users and for other system abnormalities you might encounter in the Salesforce Communities Gateway.

1. Click on the Ticketing Tool tab.
2. Click the Create New Observation button.

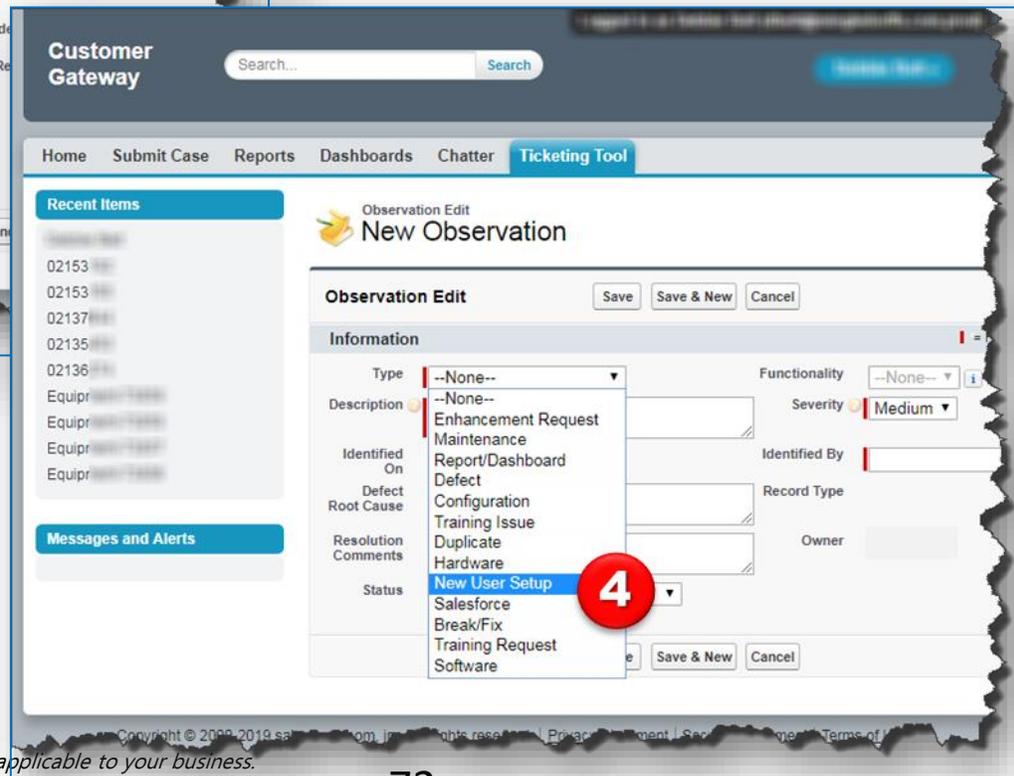


# Ticketing Tool in Salesforce



3. Click on the dropdown arrow for **Type**.

4. Select **New User Setup** (for this example we are showing a request for New User Setup, however you would select the applicable item from the drop down list).

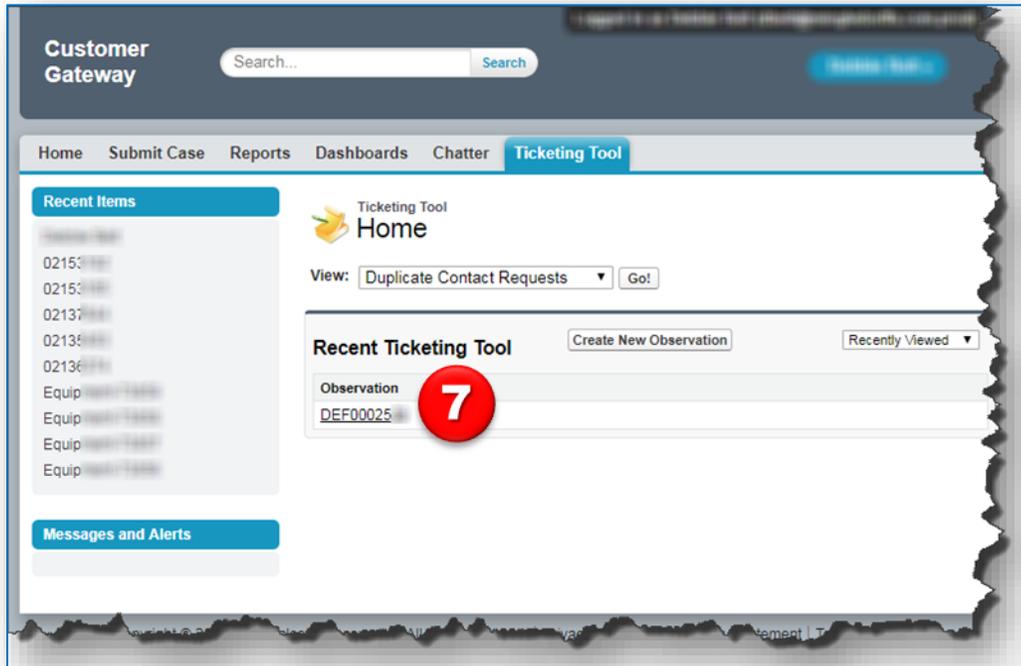


# Ticketing Tool in Salesforce

A screenshot of the Salesforce Ticketing Tool interface. The page title is "Customer Gateway" with a search bar. The navigation menu includes "Home", "Submit Case", "Reports", "Dashboards", "Chatter", and "Ticketing Tool". A "Recent Items" list is on the left. The main content area is titled "Observation Edit" and "New Observation". The form has a "Save", "Save & New", and "Cancel" button at the top. The "Information" section contains the following fields: "Type" (New User Setup), "Functionality" (New User Setup), "Description" (Please set up the following new user with Salesforce Gateway access:), "Severity" (Medium), "Identified On" (6/7/2019), "Identified By", "Defect Root Cause", "Record Type", "Resolution Comments", "Owner", and "Status" (Open). A red circle with the number "5" is placed over the "Description" field, and another red circle with the number "6" is placed over the "Save" button at the bottom of the form.

5. Fill out the required fields as shown in the example below (for new User Setup in Customer Gateway). From the new user's HVACpartners profile, provide the following details in the Description field:
  - Name of New User
  - Email Address
  - HVACP User ID
  - HVACP Pin
  - Employer Name
6. Click the Save button to submit your request.

# Ticketing Tool in Salesforce



7. Your ticket will be assigned an **Observation** number.

# Knowledge Base Articles



# Knowledge Base Articles



The screenshot shows the Salesforce Customer Gateway interface. At the top, there is a search bar with the text "warr\*" and a red circle containing the number "1" next to it. Below the search bar, there are navigation tabs: Home, Submit Case, Reports, Dashboards, Chatter, and Ticketing Tool. The main content area displays "Search Results" for the query "warr\*". On the left side, there is a "Records" folder with several sub-folders: Cases (25+), Registration Corrections (25+), Accounts (1), People (2), Articles (8), and Search All. A red circle containing the number "2" is placed over the "Articles (8)" link. The main content area shows a table of search results with columns for Action, Case Number, Subject, Case Type, Status, Date/Time Opened, and Case ID. Below the table, there are sections for "Registration Corrections (25+)" and "Accounts (1)".

1. From any screen in Salesforce, type the beginning of a word for a topic you need help with in the **Global Search** field and then hit “**Enter**” or click the word **Search**. Note: your search needs to contain 5 characters; you can use an asterisk (\*) as a wildcard.
2. Once your screen populates your **Search Results**, click on the “**Articles**” hyperlink under the **Records** folder. Note: If you do not see “**Articles**”, you may have to click the **Search All** hyperlink.

# Knowledge Base Articles



**Customer Gateway** Search... Search

Home Submit Case Reports Dashboards Chatter Ticketing Tool

### Search Results

Search Feeds Search Feeds warr\* Search Articles Options...

Records

Cases (25+)  
Registration Corrections (25+)  
Accounts (1)  
People (2)  
**Articles (8)**  
Search All

To filter these search results, go to Articles.

Article Number	Article Title	Type	Published Date	URL Name
<a href="#">000003897</a>	<a href="#">Optional Warranties Dealer Program Guide</a>	Knowledge	6/27/2019	<a href="#">Optional-Warranties-Dealer-Program-Guide</a>
<a href="#">000005197</a>	<a href="#">Warranty Administration Policies</a>	Knowledge	9/5/2018	<a href="#">Warranty-Administration-Policies</a>
<a href="#">000004578</a>	<a href="#">Subsequent Owner Warranty Coverage</a>	Knowledge	10/27/2016	<a href="#">Subsequent-Owner-Warranty-Coverage</a>
<a href="#">000004576</a>	<a href="#">WARRANTY STOCK UNIT BULLETIN CLAIM</a>	Knowledge	11/9/2016	<a href="#">WARRANTY-STOCK-UNIT-BULLETIN-CLAIM</a>
<a href="#">000005196</a>	<a href="#">Warranty Training</a>	Knowledge	9/5/2018	<a href="#">Warranty-Training</a>
<a href="#">000004553</a>	<a href="#">OL706 ICP Disposition of In-Warranty Parts Op Letter</a>	Knowledge	12/19/2017	<a href="#">OL706-ICP-Disposition-of-In-Warranty-Parts-Op-Letter</a>
<a href="#">000004554</a>	<a href="#">OL707 ICP Disposition of In-Warranty Copeland Compressors Op Letter</a>	Knowledge	12/19/2017	<a href="#">OL707-ICP-Disposition-of-In-Warranty-Copeland-Compressor-Op-Letter</a>
<a href="#">000003887</a>	<a href="#">DSM Case Entry Standard Work</a>	Knowledge	1/12/2017	<a href="#">DSM-Case-Entry-Standard-Work</a>

3. All **Articles** containing your search criteria will be displayed. You can open any of these by clicking on the **Article Number**, **Article Title** or **URL Name**.