

WARRANTY MANAGEMENT & PRODUCT REPAIR

FOR MICROSOFT CRM

FOR MANUFACTURING
AND FIELD SERVICE
COMPANIES

5 902716 728209



MICROSOFT DYNAMICS CRM WARRANTY MANAGEMENT AND PRODUCT REPAIR SOLUTION



For more information, pricing, or to request a demo, contact.

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Learn More
amllp.com/microsoft-dynamics

Armanino's comprehensive Warranty Management and Product Repair Solution for Microsoft CRM is designed to support the processes of manufacturers and distributors throughout the product lifecycle.

This solution includes fully functional Return Material Authorization (RMAs) and Field Service management capabilities, which enable warranty contract management that can be associated with the customer's product install base.

Through the use of this solution, Cases can be created and managed, allowing for better product and resource tracking, more thorough reporting, and improved scheduling. Cases provide the ability to:

- Execute install base lookups
- Check Warranty status (both standard and extended warranties)
- And assist Customer Service Representatives (CSRs) with proper support resolution techniques through the use of CRMs

Additionally, products can be tracked by model number, serial number and product repair options, which include:

- RMAs that provide the ability to ship defective parts back to a repair location (termed "Depot" within the solution) or
- Scheduling of field service technician(s) to perform the repair or replacement onsite

In both Depot Repair and Field Service options, Work Orders are created to simplify product repair and failure analysis.

The RMA functionality includes:

- The ability to send replacement parts
- Track shipping and automate the creation of return instructions
- Alert CSRs along the shipping, repair, and return processes
- A work order is used within the Depot to:
 - Track parts
 - Manage required inventory
 - Coordinate repairs
 - Provide product disposition (e.g., scrap, return to customer, or return to inventory)
- Field Service support resource tracking of skills and schedules
- The capability to reserve assets or equipment needed for the repair
- Support of 3rd party repair technicians that can be paid and requested directly through CRM

Once assets, locations, and resources are identified, a list of available times can be presented to the CSR, simplifying the scheduling process with customers.

Through this solution, technicians can utilize Microsoft CRM to see "serviceable parts" of the product to be repaired as well as repair truck stock, prior to their onsite visit. This allows technicians to order the



necessary parts in advance of the scheduled repair date.

The system also supports a field service report, resolution, and cost of repair logging, such as time and expenses. This can then be billed to customer or to be used to track the total cost of the warranty repair.

Additional Functionality

Manufacturers and distributors in any industry can utilize this solution to facilitate complaint management tracking and support.

How it Works

Upon case creation, should a complaint be identified, a complaint form compliant with federal regulations can be submitted and routed to the proper department and software solution required for root cause analysis and regulatory reporting.

About Armanino

Armanino is a Microsoft Dynamics Inner Circle member, ranked in the top 1% of partner in the world as a value-added reseller (VAR) and implementation partner for Microsoft Dynamics CRM, AX and GP, SharePoint and Microsoft Office 365.

Armanino (www.amllp.com/dynamics) has achieved dual Gold Certified Partner status for both Enterprise Resource Planning (ERP) and Customer Relationship Management (CRM). As a Gold Certified Partner, Armanino has demonstrated a notable level of industry expertise in selling and implementing Microsoft Dynamics software, providing consulting services and support, and achieving a high-level of customer satisfaction.

Features and Screenshots from Armanino's Warranty Management and Product Repair Solution for Microsoft CRM

A Customizable Serial Number Entity

This entity relates Serial Numbers to Products and can be used to track serialized products right off the assembly line, before any service call or product registration takes place. Companies that do not require serial number tracking have the option of converting lookup fields on linked forms to simple text fields that can still be used to capture serial numbers but not track them to specific products.

Microsoft Dynamics CRM | SERVICE | Serial Numbers | ACCU-4321-5555-0...

+ NEW | DEACTIVATE | DELETE | EMAIL A LINK | RUN WORKFLOW | START DIALOG | RUN REPORT | ...

SERIAL NUMBER : INFORMATION

ACCU-4321-5555-0011

General

Serial Number* | ACCU-4321-5555-0011 | Product | TomoTherapy

Notes

Screenshot of Customizable Serial Number Entity in Microsoft CRM (above)

Service Products

Service Products are divided up into a 3-tier schema. At the top level sits "Installed Products." It represents the entire install or whole product. Installed Products has a one-to-many relationship with the "Serviceable Items" that comprise it. Installed Products also allows for multiple Cases and Spare Parts Requests to be related to it, and also accommodates file attachments.

Microsoft Dynamics CRM | SERVICE | Installed Products | CyberKnife at Secon...

+ NEW | DEACTIVATE | DELETE | ASSIGN | SHARE | EMAIL A LINK | RUN WORKFLOW | ...

INSTALLED PRODUCT : INFORMATION

CyberKnife at Secondary Location

General

Name | CyberKnife at Secondary Location

Account | General Motors

Product Type | Hardware

Product* | CyberKnife

Serial Number* | ACCU-9876-5555-0012

Distributor | CC of America

Install Date | 4/24/2013

Owner* | David Meharg

Users | --

Warranty | General House Warranty 2013

Serviceable Items

Name	SerialNumber	Installed Product	Account	Created On
Componant 20 - Metal Housing	ACCU-9876-5555-...	CyberKnife at Secondar...	CC of America	4/26/2013 10:52 AM
Componant 10 - Hand piece	ACCU-9876-5555-...	CyberKnife at Secondar...	CC of America	4/26/2013 10:50 AM

Screenshot of Installed Products in Microsoft CRM

Serviceable Items

Serviceable Items are the major components that make up the Installed Product. They are generally serialized. Serviceable Items are made up of "Serviceable Item BOMs" (Bill of Materials) and therefore have a one-to-many relationship with them. They also have a one-to-many relationship with Spare Parts Requests and a Many to Many relationship with Cases. This allows for multiple Cases regarding a Serviceable Item as well as Multiple Serviceable Items on a single Case.

Microsoft Dynamics CRM

SERVICE

Serviceable Item

Food Court Blender

NEW

DEACTIVATE

DELETE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

RUN REPORT

SERVICEABLE ITEM : INFORMATION

Food Court Blender

General

Item

Food Court Blender

Installed Product

Designer Series

Serial Number

BT-1111-2222-3333

Account

Costco

Serviceable Item BOM

Active Serviceable Item BOM

Search for records

Serviceable Item	BOM Component	Serial Number	Created On
Food Court Blender	Motor and blade	BT-999-012-345	4/30/2013 2:29...
Food Court Blender	Electrical Cord and Circuit Board	BT-999-012-346	4/30/2013 2:29...
Food Court Blender	Motor housing, button controls, misc items	BT-999-012-347	4/30/2013 2:30...

Serviceable Item Bill Of Materials

Serviceable Item BOMs make up the Serviceable Items. Here we can track serialized or non-serialized parts as well as swap outs.

Microsoft Dynamics CRM

SERVICE

Serviceable Item BO...

Electrical Cord and...

NEW

DEACTIVATE

DELETE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

RUN REPORT

SERVICEABLE ITEM BOM : INFORMATION

Electrical Cord and Circuit Board

General

Serviceable Item

Food Court Blender

Currently Installed

Bom Component

Electrical Cord and Circuit Board

Serial Number

BT-999-012-346

Swap Out

Trunk Stock Item

--

Serial Number

--

Case Form and Case Type

Armanino’s Case form features a “Case Type” dropdown, which keeps the form streamlined or ease of use.

Microsoft Dynamics CRM

SERVICECasesArmanino - Depot Repair with RMA

CreateDavid MehargAMGP

NEWRESOLVE CASECANCEL CASEDELETEADD TO QUEUEQUEUE ITEM DETAILSASSIGN

CASE

Armanino - Depot Repair with RMA

Priority: NormalCreated On: 3/5/2014 2:11 PMStatus: ResolvedOwner: David Meharg

Identify (Active)ResearchPropose SolutionResolveNext Stage

Case Title: Armanino - Depot Repair with RMAFind Customer: ArmaninoCase Type: Standard CaseCase Origin: Phone

Summary

CASE DETAILS

ID: CAS-01065-R6W1T0Case Title: Armanino - Depot Repair with RMACustomer: ArmaninoResponsible Cont: Rob HarrisonFollow Up By: CONTRACT AND PRODUCT INFORMATIONSubject: Contract: Contract Line: Product: Serial Number: Service Level:

Origin: Case Type: Inquiry Type: Status Reason: Phone: Standard CaseResolvedDESCRIPTIONThe Micro drive no longer works.KB ARTICLESKnowledge Base Article: Return AuthorizationShow article

YAMMER, SYSTEM POSTS, ACTIVITIES, NOTESAllAdd Phone CallAdd TaskPower Supply RepairDue Date: 5/1/2014 11:15 AMModified by: David Meharg 4/30/2014 4:28 PM

Case with Hidden Depot Repair and Field Service (above)

If Case Type > Field Service is selected, the form will show a hidden “Field Service” section which includes Serviceable Items related to the case, Service Activities scheduled on the case, and related Spare Parts Requests.

Field Service

Serviceable Items

Name	SerialNumber	Installed Product	Account	Created On
F5	FSF5-111-222-333...	Installed on 4/18/2012		4/17/2013 11:17 PM
Hi Scan - Power Supply	ADRQ-1234-zzz1a	HiScanSQ	CV5 Pharmac...	4/17/2013 1:21 PM

Service Activities

Subject	Regarding	Customers	Resources	Service	Site	Priority
Power Supply Repair	Armanino...	Amanino	Chevy Silverado; Cristin...	Repair Service		Normal

Spare Part Requests

Requester	Name	Case	Quantity	Part	Deliver By	Owner
Scott Mangel...	Spare Parts	Armanino - D...	1	1950 Fraxel	4/29/2014	David Meharg

Field Service Report

Device Identification: ConfirmedDate of Service: 4/10/2012 12:00 AMEngineer: S MackService Performed: SymptomTest and Record Res: Repaired, replaced motorTotal Hours Spent: 10.00Total Expenses: \$1,299.84Invoice DetailsInvoice Received: NoChargable: Invoice Received Da: Invoice Number:

Case Type with Field Service Selected (above)

If Case Type > Depot Repair is selected, a hidden section is displayed with additional Depot Repair fields and Repair Reports. This is shown in the screenshot below:

Depot Repair

Depot Repair

Repair Facility: San Ramon CenterRMA: RMA-5011Replacement Order: POS ReplacementThird Party Return:

Repair Testing Reports

Subject	Case	Regarding	Date Created	Status Reason
Repair Report	Armanino - Depot Rep...		4/10/2014 8:51 AM	In testing

Case Type with Depot Repair Selected (above)


Repair Report

The Repair Report form is an activity entity whose “regarding” field can be set to anything (for example, Installed Product, Serviceable Item, or Serviceable Item BOM). It includes a dedicated field that allows it to be related to a Case.

REPAIR REPORT : INFORMATION

Repair Report

General

Subject *	Repair Report	Status Reason	In testing
Case	Armanino - Depot Repair with RMA	Start Date	4/10/2014
Work Order/Service	--	Due Date	4/10/2014
Priority	Normal	Owner *	 David Meharg
Root Cause Catagori	--		
Initial Test Date	4/10/2012		
Initial Inspection Not	Confirmed failure		
Root Cause	Bad Powersupply		
Final Inspection Com	4/10/2014		
Final Inspection Not	--		



Spare Parts Request

A Spare Parts Request can be related to the Installed Product and/or the Serviceable Item and contains a dedicated field to relate it to the Case. The Spare Parts Request has a fixed requester while the record ownership remains flexible and may be assigned to someone else to fill.

SPARE PARTS REQUEST : INFORMATION

RMA Replacement Parts

General

Request *	RMA Replacement Parts	Requester	 Ken Johnson
Account	Armanino	Part	Micro Drive (MD200 etc)
Installed Product	MicroDrive black	Quantity	1
Serviceable Item	E5	Deliver By	7/13/2013
Case	Armanino - Depot Repair with RMA	Owner *	 David Meharg
		If Unused Return to :	<input checked="" type="checkbox"/>

Status

Status *	Active	Status Reason	Requested
----------	--------	---------------	-----------

Address

Ship To:

Street Address 1	1185 Starr Ave	City	Saint Helena
Street Address 2	--	State	CA
		Zip	94574

Notes and History

Work Orders

Work orders are used to support material tracking, to prioritize work effort within the Depot, and to log and record product repair and replacement activities.

Microsoft Dynamics CRM

SERVICE

Work Orders

WO00004

NEW

DEACTIVATE

DELETE

ASSIGN

SHARE

EMAIL A LINK

RUN WORKFLOW

...

WORK ORDER : INFORMATION

WO00004

General

WO Number

WO00004

Third Party

None

Case

Depot Repair

RMA

RMA-5003

Work Order Details

Repair Product

Facility

San Ramon Center

Created On

4/11/2013 12:27 PM

Status Reason

Submitted

Owner

David Meharg

Instructions

Unplug First

Notes

CAPA Compliant Product Complaint Form

The Product Complaint form is fully compliant and assists in facilitating CAPA reporting for Life Sciences companies. This form is related to Case and Account and can accommodate file attachments.

Microsoft Dynamics CRM

SERVICE

Product Complaints

New Product Compl...

NEW

DEACTIVATE

DELETE

EMAIL A LINK

RUN WORKFLOW

START DIALOG

RUN REPORT

...

PRODUCT COMPLAINT : INFORMATION

New Product Complaint

Customer

Case Origin Id

CAS-01041-S8M4G9

Case

RMA: Product Return for Failure

Customer

CVS Pharmacy, Inc.

Contact

Scott Anderson

Phone

707-337-3304

Street

--

City

Thousand Oaks

State

CA

Zip

--

Country

--

Item Information

Product

HiScanSQ

Manufacture Date

2/12/2013

Complaint

Complaint ID

001

Created On

4/17/2013 1:08 PM

Date Occured

4/10/2013

Date Employee Noti

4/11/2013

Date Distributor Not

4/23/2013

Problem Description

--

Subject

Failure

Complaint Category

--

Originated By

--

Regulatory Information

Injury

Other Serious

To Be Returned

Yes