



SERVMAN

Warranty Training Manual

January 2021

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PREFACE

This program is designed to give you the dealer, the ability to submit a warranty claim, check the status and add notes that are relevant to the claim.

LOG IN

This program is accessible online through the link below:

Click here to access **Kohltech Warranty Service**: warranty.kohltech.com

This webpage is available to you at any time, and will open on the login page.

Start by entering the username and password that has been provided to you.



If you require a username and password please contact your Territory Sales Manager.

ORDER ENTRY – QUICK OUTLINE

This section will quickly outline how to submit a Work Order.

Further details and descriptions will be outlined in the following sections of this training manual.

- If they are an existing customer (one who has previously submitted a claim) you can search for them by clicking 'Pick Customer'. *It is recommended to search for a customer BEFORE creating a new customer.*
- After you have either located or created the customer, move onto the Work Order Form.

Enter a New Work Order

FIND CUSTOMER

Name: [John Doe] Phone: [] Postal/Zip: [] Email: []

Search: [] **1 Row(s) Returned** [Create New]

SELECT	Name	Phone#	Address1	Address2	City	Province	Postal	Country	Email
	John Doe	902-123-4567	123 Anywhere Street		Nowhere	NS	A1B 2C3	CA	John@doe.com

- When filling out the 'Work Order Form' it is recommended that you be as descriptive and accurate as possible. If you need more detail on what is required, place your mouse on the '?' to view a description.

The Work Order Form includes:

(1) DEALER INFORMATION:

- This is where you enter the information associated with you, the dealer.

(2) WORK SITE ADDRESS:

- This is where you enter the address of where the service work will be performed.

(3) PRODUCT INFORMATION:

- This is where you enter information about the previously purchased Kohltech product that the customer is having issues with.

(4) ISSUE INFORMATION:

- This is where you indicate the type of issue with the product.

NOTE: *If you are adding multiple issues, make sure to add detailed notes in the next section to help clarify.*

(5) REQUEST/COMMENTS:

- This section is used to describe the customer issue(s) in more detail or to add any additional information, or notes that are relevant to the service call.

(6) DOCUMENTS/PICTURES:

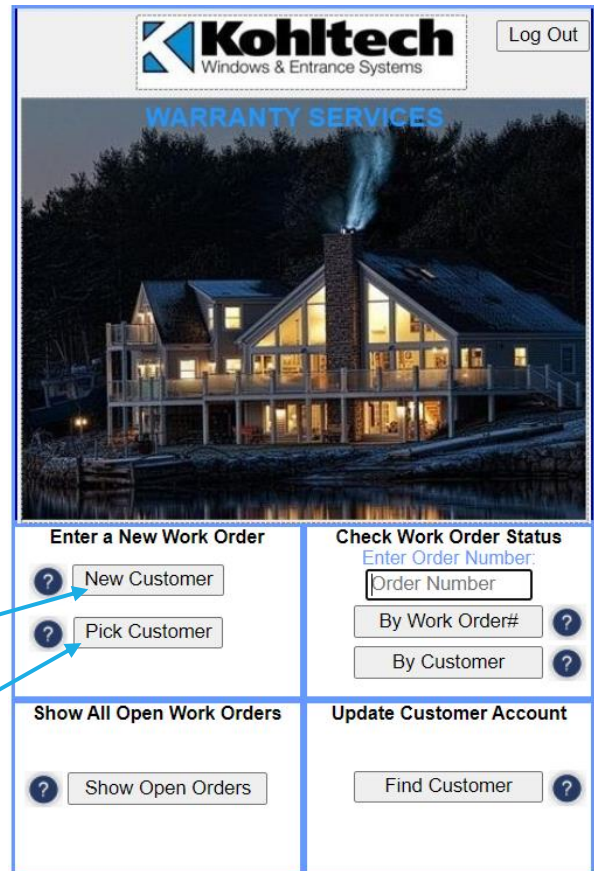
- This is where you can attach pictures or documents that are relevant to the work order.

Once you are satisfied with the information in the work order, click 'Submit Work Order'.

LANDING PAGE

After signing in, you will have 4 main options.

1. Enter a New Work Order
2. Check Customer Order Status
3. Show All Open Work Orders
4. Update Customer Account



ENTER A NEW WORK ORDER

Under *Enter a New Work Order* you will find 2 options: **New Customer** & **Pick Customer**.

If this is a new claim, for a new customer begin by selecting **'New Customer'**.

If this is a customer who has previously submitted a claim select **'Pick Customer'**.

NOTE: It is highly recommended to check **'Pick Customer'** BEFORE entering a new customer.

NOTE: Section **'Phone 1'** has to be filled out to show up on the Work Order. You can change the field to Home, Mobile or Work as needed.

To create a new customer profile, begin by entering the customer information.



Note: Address should be the MAILING address of the homeowner/company - service address is specified on the Work Order info page.

NOTE: If this claim is on behalf of a builder/contractor the address entered in this section should be their business address.

Name:

Address1:

Address2:

City:

Prov/State:

Postal/Zip:

Country:

Account: ****NEW ACCOUNT****

Email:

Phone1: () () ()

Phone2: () () ()

Phone3: () () ()

Contact Preference:

After entering customer information, click **'Save and go to Next Page'**. This will take you to the Work Order Form.

WORK ORDER FORM

This is where you enter all the details regarding the warranty claim.

The work order form has 6 sections:

1. Dealer Information
2. Work Site Address
3. Product Information
4. Issue Information
5. Request/Comments
6. Documents/Pictures

NOTE: It is recommended that you be as descriptive and accurate as possible when filling out Product and Issue Information. If you need more detail on what is required, place your mouse on the '?' to view a description.

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WORK ORDER FORM

Please ensure all areas of this form are complete and accurate. A lack of information could result in a delay of service. Move your mouse over the ? to get a description of the field next to it.

Customer	John Doe
Work Order	**NEW ORDER**
Request Date	1/4/2021
Status	UnSubmitted
Phone	902-123-4567

(1) DEALER INFORMATION

Dealer Representative: ?

Dealer Inspected: Yes No ?

Order Type: ?

(1) DEALER INFORMATION:

This is where you enter the information associated with you, the dealer.

- Enter the employee who is entering the work order (your name).
- Indicate whether you have performed an inspection of the product before entering this work order.
- There are two options for Order Type: Warranty Service is a request for a technician to make a service visit. Supply Only is a request for replacement parts only, with no technician visit.

(2) WORK SITE ADDRESS

Address1: ?

Address2:

City:

Province/State:

Postal/Zip:

Country: ?

Building Type: ?

(2) WORK SITE ADDRESS:

This is where you enter the address of where the service work will be performed.

(3) PRODUCT INFORMATION:

This is where you enter information about the Kohltech product that the customer is having issues with.

- Indicate the type of product the customer is experiencing issues with.
 - The type of product must be accurately specified to reflect the product we are working with.
- Enter the serial number which is located on the product itself.
- Enter a brief description of the product.
- Indicate the Date of Purchase
- Add the product to the 'Product List' (repeat the process if there are more products).

NOTE: You do not need to enter a description if you are able to provide the Order and Line numbers.

DO NOT Add the product issue here.

NOTE: Hover over the '?' to link to a video that will show you how to find the ID Tags that include the Serial, Order and Line number.



(3) PRODUCT INFORMATION ?

Product Type: 10000 Casement (West)

Serial#: Order#: Line#:

Description:

Date Purchased: January 1900

PRODUCT LIST

	Serial#	Type	Description	Purchased
✖				

(4) ISSUE INFORMATION:

This is where you indicate the type of issue with the product.

- Select the type of issue.
- Indicate the quantity of the issue (if it is happening in multiple areas, or if multiple things are damaged).
- If you have only indicated 1 product, the serial number will be automatically selected.
- *If you have entered more than 1 product, ensure that you have the correct serial number for the correct product.*
- Add the issue to the 'Issue List' (repeat the process if there are more products).

NOTE: If you are adding multiple issues, make sure to add detailed notes in the next section to help clarify.

(4) ISSUE INFORMATION ?

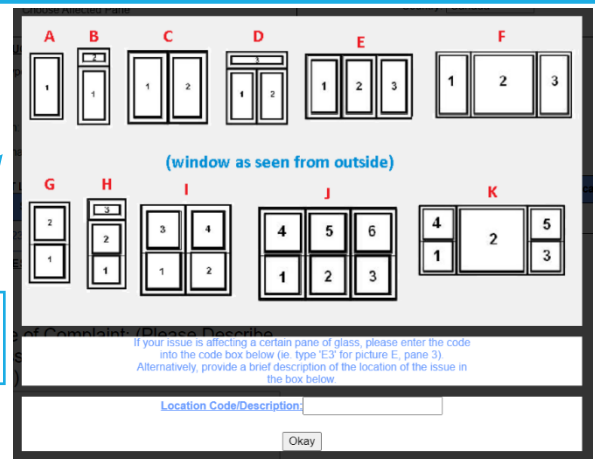
Issue: Seal Failure

Quantity: 1

Serial#:

ISSUE LIST

	Num	Issue	Quantity	Serial#	Location
✖					



After adding the issue to the list, you will see a popup, which will ask you to indicate exactly where the issue(s) is occurring.

NOTE: Indicate the area of the issue (ex: 'E3' for picture E, pane 3).

(5) REQUEST/COMMENTS:

This section is used to describe the customer issue(s) in more detail or to add any additional information, or notes that are relevant to the service call.

- Indicate the nature of the complaint with as much detail as possible.
- This section can also be used as a tool to keep track of communication with the customer or to add any updates that are relevant to the claim.

NOTE: *If you have indicated multiple issues, make sure to add detailed notes to help clarify. Also, keep in mind that some issues may require more description (ex: a hardware issue, notes will need to be added to describe the issue).*

(5) REQUEST/COMMENTS ?

Nature of Complaint: (Please Describe The Issue(s) in More Detail in the Box Below)

NOTE: *The 'Request/Comments', is the only field that can be edited after submitting the work order. Notes, Pictures and Documents can only be added after the work order is submitted.*

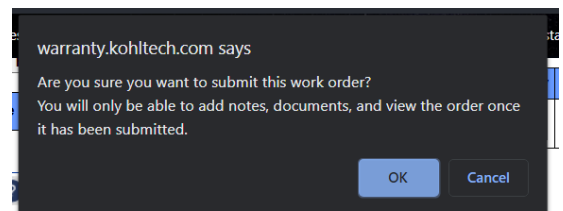
(6) DOCUMENTS/PICTURES:

This is where you can attach pictures or documents that are relevant to the work order.

- Use the 'Choose File' button to browse your computer and select a file, then 'Upload File' button to add it to the work order.

(6) DOCUMENTS/PICTURES ?

- Once you are satisfied with the information in the work order, click 'Submit Work Order'.
- You will then be asked to confirm that you would like submit the work order by clicking 'OK'.



Order Submitted Successfully.

[Main Menu](#) [Log Out](#)

You have now successfully submitted the work order.

PICK CUSTOMER

Is used to quickly select an existing customer.

NOTE: *It is highly recommended to check 'Pick Customer' BEFORE entering a new customer.*

Enter a New Work Order <input type="button" value="New Customer"/> ? <input type="button" value="Pick Customer"/> ?	Check Work Order Status Enter Order Number: <input type="text" value="Order Number"/> <input type="button" value="By Work Order#"/> ? <input type="button" value="By Customer"/> ?
Show All Open Work Orders <input type="button" value="Show Open Orders"/> ?	Update Customer Account <input type="button" value="Find Customer"/> ?

Using the 'Pick Customer' option will take you to the 'Find Customer' Page.

Main Menu

FIND CUSTOMER

Name: Phone: Postal/Zip: Email:

Row(s) Returned

You will notice no names are listed on this landing page. To search for a customer, use the boxes provided, *you do not need to enter information in all the boxes.* A first or last name will likely be enough for you to locate the customer. Click 'Search' after you have entered the information


FIND CUSTOMER

Name: Phone: Postal/Zip: Email:

1 Row(s) Returned

SELECT	Name	Phone#	Address1	Address2	City	Province	Postal	Country	Email
	John Doe	902-123-4567	123 Anywhere Street		Nowhere	NS	A1B 2C3	CA	John@doe.com

Once you have located the customer you are searching for click 'Select'. This will take you to the Work Order Form where you indicate the information relevant to the work order as indicated above.



WORK ORDER FORM

Please ensure all areas of this form are complete and accurate. A lack of information could result in a delay of service. Move your mouse over the ? to get a description of the field next to it.

Customer:

Work Order:

Request Date:

Status:

Phone:

(1) DEALER INFORMATION ?

Dealer Representative: ?

Dealer Inspected: Yes No ?

Order Type: ?

(2) WORK SITE ADDRESS ?

Address1:

Address2:

City:

Province/State:

Postal/Zip:

Country:

Building Type:

(3) PRODUCT INFORMATION ?

(4) ISSUE INFORMATION ?

CHECK WORK ORDER STATUS

Check Work Order Status
Enter Order Number:

 ?
 ?

To check the status of a work order, there are 2 options:

1. By Work Order #
2. By Customer

If you have the work order number, enter it in the box that says 'Order Number'.

If you do not have the work order number, you can check the work order by searching for the customer. Checking a work order status by customer, is the same process as searching for an existing customer.

To check the status, enter the information in the boxes provided, then click 'Search', find the customer whose work order you are searching for and click 'Select'

FIND CUSTOMER

Name: Phone: Postal/Zip: Email:

1 Row(s) Returned

	Name	Phone#	Address1	Address2	City	Province	Postal	Country	Email
<input type="button" value="SELECT"/>	John Doe	902-123-4567	123 Anywhere Street		Nowhere	NS	A1B 2C3	CA	John@doe.com

SHOW ALL OPEN WORK ORDERS

This section is used to view any and all open work orders.

Once you select 'Show Open Orders' it will take you directly to any open work orders.

Show All Open Work Orders

SHOW ORDERS

	Name	Dealer Rep	Issue	Status	Phone #	Address	City	Submitted On	Schedule Date
SELECT	John Doe	Bob	Operation/Movement Issue	Scheduled	902-123-1234	123 Somewhere Road	Truro	Nov 9 2020	Week of 1/4/2021-1/8/2020
SELECT	Jane Doe	Bill	Seal Failure	Open	902-987-6543	863 Nowhere Lane	Dartmouth	Dec 17 2020	N/A
SELECT	Jamie Smith	Nina	Hardware Issue	Submitted	902-192-8374	902 White Road	Halifax	Dec 7 2020	N/A

Click the 'Select' button next to the customer whose work order you would like to view.

This will open up the current work order. You will notice that not all fields can be changed.

You can easily update the work order by adding notes, documents and pictures.



WORK ORDER FORM

Please ensure all areas of this form are complete and accurate. A lack of information could result in a delay of service. Move your mouse over the to get a description of the field next to it.

Customer	John Doe
Work Order	**UNASSIGNED**
Request Date	1/4/2021 8:58:30 AM
Status	Submitted
Phone	902-123-4567

(1) DEALER INFORMATION

Dealer Representative:

Dealer Inspected: Yes No

Order Type:

(2) WORK SITE ADDRESS

Address1:

Address2:

City:

Province/State:

Postal/Zip:

Country:

Building Type:

(3) PRODUCT INFORMATION

Serial#	Type	Description	Purchased
1234567/001	10C		1/1/1900

(4) ISSUE INFORMATION

Num	Issue	Quantity	Serial#	Location
1	Seal Failure	1	1234567/001	A1

(5) REQUEST/COMMENTS

Previous Notes:

Date/Time	Notes
--1/4/2021 8-08:58:30-- Added By Dealer	This is not a real work order. Please disregard. ISSUE LOCATIONS: ISSUE 1:A1 DealerInspected:Yes

UPDATE CUSTOMER ACCOUNT

This section is used for to update customer information.

It functions exactly as 'Pick Customer' does. Click 'Find Customer' to find the customer you want to update

Enter a New Work Order <input type="button" value="New Customer"/> ? <input type="button" value="Pick Customer"/> ?	Check Work Order Status Enter Order Number: <input type="text" value="Order Number"/> <input type="button" value="By Work Order#"/> ? <input type="button" value="By Customer"/> ?
Show All Open Work Orders <input type="button" value="Show Open Orders"/> ?	Update Customer Account <input type="button" value="Find Customer"/> ?

To search for a customer, use the boxes provided, *you do not need to enter information in all the boxes.*

FIND CUSTOMER ?

Name: Phone: Postal/Zip: Email:

Row(s) Returned

Click 'Search' after you have entered the information.

FIND CUSTOMER ?

Name: Phone: Postal/Zip: Email:

1 Row(s) Returned

	Name	Phone#	Address1	Address2	City	Province	Postal	Country	Email
<input type="button" value="EDIT"/>	John Doe	902-123-4567	123 Anywhere Street		Nowhere	NS	A1B 2C3	CA	John@doe.com

Once you have located the customer whose information you want to update click 'Edit'.



CUSTOMER INFORMATION

Note: Address should be the MAILING address of the homeowner/company - service address is specified on the Work Order info page.

This will open the customer information which you can edit and update as required.

Click 'Save and Close' when finished.

Account:

Name:

Address1:

Address2:

City:

Prov/State:

Postal/Zip:

Country:

Email:

Phone1: (902)

Phone2: () () ()

Phone3: () () ()

Contact Preference:



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