**TECH AFRICA – STOCKS DATABASE**

**WARRANTIES MODULE – DESIGN BRIEF**

Job cards and warranty – if serial number not in tblserialno then add new and flag as allocated. Also check same machine and msgbox if not and check to change

Check validations

Complete email settings

Fix table for new fields – and check on other affected eg fix invoice

Add in screen for spares and replacements entries as well as a list box for what was entered

**Work-flow (General) – Progress reports to be emailed daily to various staff**

* The new warranty is entered into the database and emailed internally to various staff members
* A supplier is then assigned to the claim
* Costs are assigned to the claim
* Email sent to supplier
* Job card scan and spares vouchers, third party invoices attached to record when completed
* Approval from supplier will be attached to the record
* Tracking reports to be emailed internally
* Follow up reports to be emailed to supplier of outstanding claims
* Other reports to be done
  + Report on repairs for a specified serial number – pulled from Job cards as well as warranty claims
  + Grouped by supplier, sub group on machine - Total values of claims per supplier as a cross tab summary
    - Columns = Approved, Pending, Rejected

**Functions / Working Parameters**

* The new warranty is entered into the database and emailed internally to various staff members
  + The form has been done for this as well as some validations
  + The email process needs to be written in
  + Photos are also to be attached to the claim
* A supplier is then assigned to the claim
  + Need an update form where all data for the claim can be reviewed
    - Including a sub form for costs
* Costs are assigned to the claim either
  + - A full product replacement
      * This needs to be authorised by the MD
    - Cost of labour, spares, transport
  + Costs are taken from the pastel journal – this can be done prior to completion of the job
  + The form has been set up for this, but need it as a multi-line – it is currently single line
* Email sent to supplier
  + Claim Invoice, Photo’s and job card (if available) are all sent with this
* Job card scan and spares vouchers, third party invoices attached to record when completed
  + The flag will be changed once this is done
* Approval from supplier will be attached to the record
  + This will either be a credit note or an email
  + A table is needed for credit note numbers for the sake of queries as most will not have a credit note
  + The flag will then be set to completed and approved
* Tracking reports to be emailed internally
  + Grouped by supplier
  + Sorted by date started oldest to newest
  + Only for claims not set to completed and approved
  + Show the total value of the claim if there is a value but if null to show as cost to be calculated
* Follow up reports to be emailed to supplier of outstanding claims
  + Sorted by date started oldest to newest
  + Only for claims not set to completed and approved
  + Show the total value of the claim if there is a value but if null to show as cost to be calculated
* Other reports to be done
  + Report on repairs for a specified serial number – pulled from Job cards as well as warranty claims
  + Grouped by supplier, sub group on machine - Total values of claims per supplier as a cross tab summary
    - Columns = Approved, Pending, Rejected

Email for initial notification

Email body

Line 1 = dear xx

Line 2 = Kindly note that I have added a new claim for your attention as detailed below

Line = date of claim

Line = we received a [machine name] from [customer name] as a warranty issue

Line = Machine description

Line = serial number bodyLn5– checks for blanks and excludes

Line = running hours – use an if statement to leave if blank bodyLn6 – checks for blanks and excludes

Line = Purchase date and leave of if null bodyLn6 – checks for blanks and excludes

Line = repairs status

Line = Main problem – try see how to highlight and bold

Line = Detailed report – may change a bit here on the fields for report, cause, solution, spares

Line = Cause

Line = Solution

Line = spares of replacement

Line = name and email signature

Add button to add spares as a pop-up menu and then get spares from the query