Manuals+

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RSG

RSG Service Agent

Specifications

- Product Name: Global Warranty Service Agent Guide

- Function: Claim processing and warranty guidelines for service agents
- Features: Warranty claim entry, claim list management, serial number lookup
- Manufacturer: Global Warranty

Product Usage Instructions

Warranty Guidelines and Helpful Information: To ensure warranty claims are processed correctly:

- Record and use the exact serial number listed on the equipment.
- For Walk-ins, use the box serial number for the box and door issue and the unique serial number from the Tag for Refrigeration/Freezer.
- Enter any alphanumeric characters in front of the serial number for correct model identification.
- Always verify the model and equipment location before starting a warranty claim.
- Keep receipts for purchased parts as evidence for reimbursement.
- Obtain a work authorisation number for efficient claim processing (recommended).

Parts Exchange within Warranty Period

If equipment is within the 1-year warranty period:

- Exchange parts at the OEM wholesaler.
- Do not remove the wholesaler's information from the component.
- Contact the service department for guidance on exchanges.

Customer Responsibility:

- Note that normal wear items like light bulbs, cleaning, and preventive maintenance are customer responsibilities.

Email Communication

Ensure the correct email address is in the claim for information clarity and communication.

Manufacturer's Warranty Guidelines:
Follow specific guidelines communicated by the manufacturer for claim processing.

Entering a Claim

- Purpose: To show the Service Agent how to use Global Warranty to enter a New Claim and search for a Serial Number. Check claim status. Upload receipts.

Log in to Global Warranty

- Go to http://globalwarranty.davisware.com/globalwarranty/
- Your Login information is the same as Warranty Central. You can obtain the login information from your manufacturer if you have forgotten it or do not have a login or password. The login for Global Warranty is case sensitive. Some accounts that were merged will have to be reset. Contact your manufacturer's service department.

When you log in to Global Warranty, you will first see the "Claim List". More on this latter.

Find the "Warranty Claims" menu from the upper left of the screen and hover your mouse over it.

When the menu opens, select "New Claim" from the list.
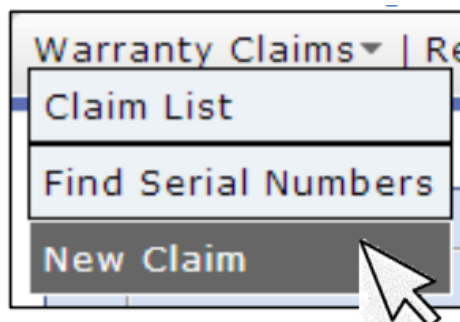
Enter the Exact serial number and tab out of the cell. The model number will be displayed below the serial number at a minimum. The warranty days are now visible in the lower right corner. Include alphanumeric characters if applicable.

Fill out the necessary information from sthe store number down to the complaint.

The required information is highlighted by a red asterisk (*) in blue text.

Warranty Claim Policy Review

1. In the claim summary screen
2. Click on the policy button.

3. The policy pop-up is displayed.

4. Review. This information is available on every claim and does not normally change, but is reviewed annually.

Select the "Save" button. After you click the "Save" button in the lower right corner of the page, you will see additional tabs to the right ofthe summary.

Depending on the size of the computer screen, scrolling up and down, left and right on the page may be needed.

The claim status will automatically change to "Staging" at this point.

You can leave the "new claim" screen or log off the global warranty program after you select save and the information will be saved.

Click on the "Labour Details" tab to enter the time on the calendar, travel time, and mileage.

Click on the "Add Labour Line" button near the bottom right of the page.

Enter the necessary information into the "Actual" column on the window that has opened. Click the "Save" button on the window when done.

- Note 1: Technician is a required field.
- Note 2: The "Actual" column is for use by Authorised Service Agents. Manufacturer logins will fill in the "Approved" column when necessary. You

can enter labour hours by either entering a "Time Started" and "Time Completed" or directly into the "Hours" field.

- Note 3: You can have more than one labour line.

Click on the "Parts" tab to enter the items used on the order. If you do not have a part number, you will select the miscellaneous item box and then enter a description.

Click on "the Add Line Item" button near the bottom right of the page.

Enter the Item Number and Quantity used on the service call. Click the "Save" button when done.

You can enter multiple different item lines.

Select Miscellaneous Part to enter anything not identified by a specific part number. When you select the Miscellaneous part, you need to put a short description in the item number field. Examples could be "Hoist", R404 Refrigerant, etc...
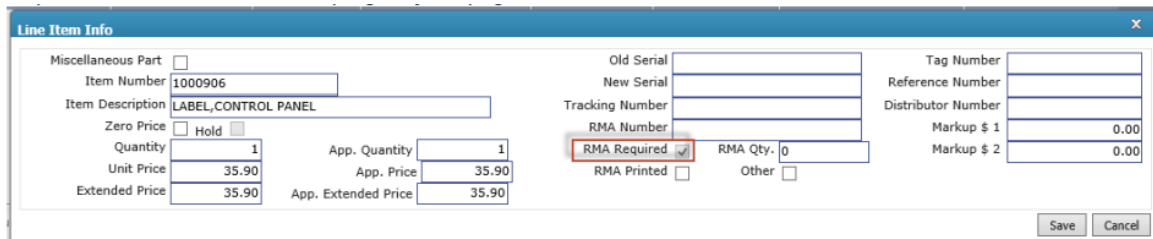

If the part needs to be returned, the "RMA Required" box will be checked. Upon

saving the part, a RMA number will be generated. Click on the individual lines to view different RMA numbers. Master-Bilt will not be using this section at this time – it may be implemented at a later date.
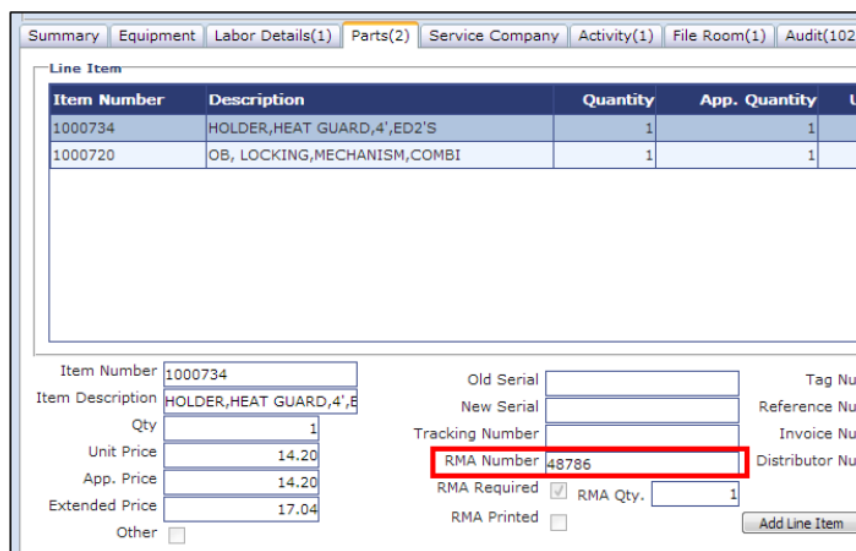
To print the RMA, scroll to the top right of the page and click the "RMA Print" button.

As an option, you can select the "Activity" tab. This is where you will see any notes returned from the manufacturer for more information, or activity history on the claim. You can see any notes or information about the claim – such as approved date, explanation of reductions, etc

Select the "Add" button to open up the activity info. Enter a note and select Save.
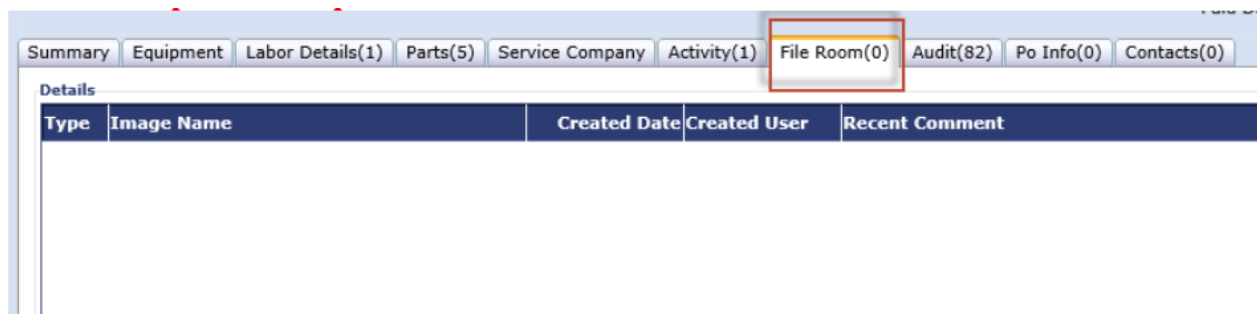
Uploading Part Pictures and Receipts

Another option, you can select the "File Room" tab. Examples of files you might want to upload are a picture of the part or piece of equipment, or a copy of the invoice.

- Upload all receipts,s including core credit receipts (if applicable). This will save time on the return of claim to request compressor receipts or the purchase price of components. OEM receipts are required for verification of credits due.

Select "Browse" and find the file, then select "Upload".

After all entering parts, labour, optional activity and file room, return to the Summary tab.

Select the "Edit" button.

Whenever you leave the "Summary" tab and then return, you will need to select the "Edit" button to enter more information on the "Summary" tab.

Enter the information for the remaining fields required shown below.

After you have filled out all the information, select "Save"

In the bottom section of the claim page, you can see the claim amounts. Now select the "Submit Claim" button.

Total						Actual Amount	Approved Amount
	Actual Amount	Approved Amount	Hold		Other Charges	0.00	0.00
Freight Amount	0.00	0.00	☐		Parts Total	415.73	415.73
Expedited Freight Amount	0.00	0.00	☐		Labor Total	121.16	121.16
Diagnostic Fee Amount	0.00	0.00	☐		Tax Total	0.00	0.00
Shipping Amount	0.00	0.00	☐		Grand Total	536.89	536.89
Travel Amount	0.00	0.00	☐		Rejected Amount	0.00	

After you select "Submit Claim", a window will open summarising the claim. If any of the top fields show a red "X", you will need to fix the issue relating to the claim before you can submit. If you have all green check marks, you can select "Ok". This submits the claim to the manufacturer.

A dialogue box comes up letting you know that the claim has been submitted to the manufacturer.
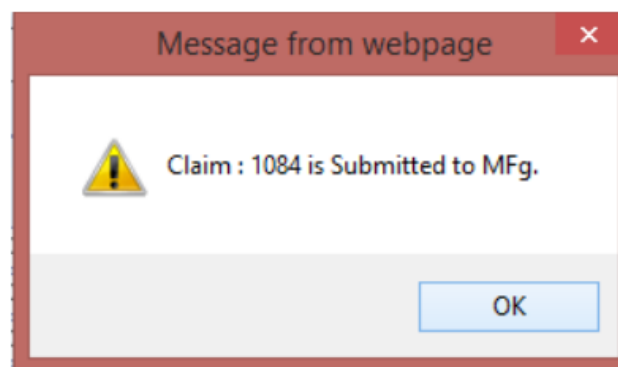
Claim List

Find the "Warranty Claims" menu from the upper left of the screen and hover your mouse over it.

When the menu opens, select "Claim List" from the list.
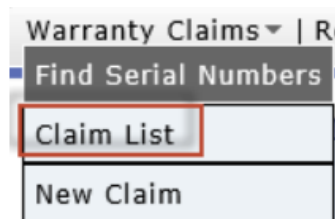
From the "Claim List" page, you can choose to search for a claim by:

- a. Account Number
- b. Created Date
- c. Approved Date
- d. Authorised Date
- e. Claim Status (See further information below)
- f. Reference Number
- g. Authorisation Number
- h. Invoice Number
- I SO Number

The claim statuses you would be interested in are:

- a. ALL – All Claims
- b. ALL PENDING-View all pending call statuses (SubmitMfg, Preauthorized, Authorised)
- c. APPROVED – Claims approved by the Manufacturer
- d. APPROVED PAID – Claims approved and paid by the Manufacturer
- . HOLDMFG – Manufacturer is holding the claim, awaiting more information.
- f. NEED MORE INFO – Manufacturer has looked over the claim and is requesting more information.
- g. RMAPENDING-Waiting for manufacturer to retrieve the RMA number & parts
- h. RESUBMIT-Resubmit the claim to the manufacturer
- . STAGING – These are claims the service agent is currently working on and has not submitted to the manufacturer.
- j. SUBMITMFG-Claim has been submitted to the manufacturer for the service Agent

You can also sort the list by clicking on any of the column headings.

To view a claim, select "View".

To view a claim report,t select "View Report"

To view a claim report select "View Report"

## To print a claim report, rt select the printer icon.

Find a Serial Number

Find the "Warranty Claims" menu from the upper left of the screen and hover your mouse over it.

When the menu opens, select "Find Serial Numbers" from the list.
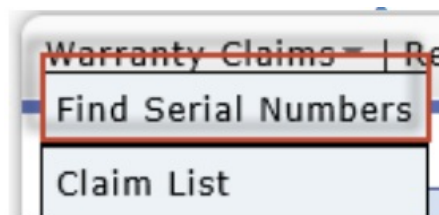
Enter the "Serial Number" and select search.

You will notice that the serial number is autocompleting as you type. You can also search for a serial number by "Name", "Zip Code", "Address", "Telephone #", "Part Number", "City", "Original Invoice Number", "Model Number", "State", and "Store Number".

You can view the summary, prior claims, activities, and model and file room.

Additional Information and Notes

- If you have any questions or need any further information, contact your manufacturer's service department.

Warranty Guidelines and helpful information

- Purpose: To have warranty claims entered correctly to prevent returns or refusals due to a lack of information or wrong information. By understanding the information needed to have warranty claims processed more quickly.
- When Servicing Equipment, record and use the exact serial number listed on the equipment. If you are servicing a Walk-in, use the box serial number for issues related to the Box and Door only. If you are working on the Refrigeration/Freezer of the walk-in, use the unique serial number from the Tag found on the base plate of the condensing Unit. The serial number must be entered completely.
- Some Cabinets have Alpha Numeric character in front of the serial number and those must be entered for Global Warranty to pull up the correct Model being worked on. Always verify that the model and equipment location are correct when you are starting a warranty claim.
- If you have purchased parts, always keep the receipt. It can be uploaded directly into Global Warranty as evidence for reimbursement.

- Obtaining a work authorisation number from the service department is highly recommended, but not required. Sometimes the manufacturer can assist with parts needed or information on the unit being serviced. The Thepre-authorisationss also help in the efficient processing of a claim for any extenuating circumstances, such as site security requirements or miscellaneous charges that need to be covered. Your service claim will be covered per the Warranty Guidelines of the manufacturer.
- If the equipment is within the 1-year warranty period, ensure that the parts needed are exchanged at the OEM wholesaler. Do not remove the wholesaler's information from the component; they will need that information to complete the exchange. If you have any questions on what can be exchanged or how to do this correctly, please contact the service department.
- Please note that normal wear items, such as light bulbs, cleaning, preventive maintenance and calibration are the customer's responsibility and that information needs to be communicated to the customer and billed separately if needed.
- Ensure that the email address is correct in the claim- so if more information is needed or clarification is required to process the claim, we are contacting the correct person/office where work was completed.
- The Manufacturer may have more specific Warranty Guidelines that are communicated to the service agents; this information is just a guideline to assist the transition of using Global Warranty to process claims. Building a mutual relationship of respect and trust with our service agents is critical to us in keeping our customers happy and having repeat business.

FAQs

Q: Is a work authorisation number necessary for processing a claim?
A: While not required, obtaining a work authorisation number is highly recommended for efficient claim processing.

Q: What should be done if the equipment is within the warranty period?

A: Exchange parts at the OEM wholesaler without removing their information from the component. Contact the service department for guidance if needed.

Documents / Resources

	[RSG Service Agent](#) [[pdf](#)] User Manual Service Agent, Service, Agent

References

- [User Manual](#)

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