MICROSOFT DYNAMICS
WARRANTY MANAGEMENT & PRODUCT REPAIR SOLUTION

Armanino's comprehensive Warranty Management and Product Repair Solution for Microsoft Dynamics 365 is designed to support the processes of manufacturers and distributors throughout the product lifecycle.

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

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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 Dynamics 365 (or prior versions of Dynamics 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 works with growth-oriented companies to simplify customer data management and streamline business development processes. As one of the world's leading integrators of Microsoft Dynamics 365, we have the background and experience to integrate our product with virtually any business-critical system. In fact, our CPA roots give us exceptional credentials to synchronize your customer data with ERP and financial systems. At Armanino, we deliver the tools you need to focus on your customers and grow.

Features and Screenshots from Armanino's Warranty Management and Product Repair Solution for Microsoft Dynamics 365

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.

Screenshot of Customizable Serial Number Entity

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.

Screenshot of Installed Products

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.

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.

Case Form and Case Type

Armanino's Case form features a "Case Type" dropdown, which keeps the form streamlined or ease of use.

Case with Hidden Depot Repair and Field Service

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.

Case Type with Field Service Selected

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:

Case Type with Depot Repair Selected

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 Note	--		

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
Servicable Item	F5	Deliver By	7/13/2013
Case	Armanino - Depot Repair with RMA	Owner *	David Meharg
		If Unused Return to	☑

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.

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.