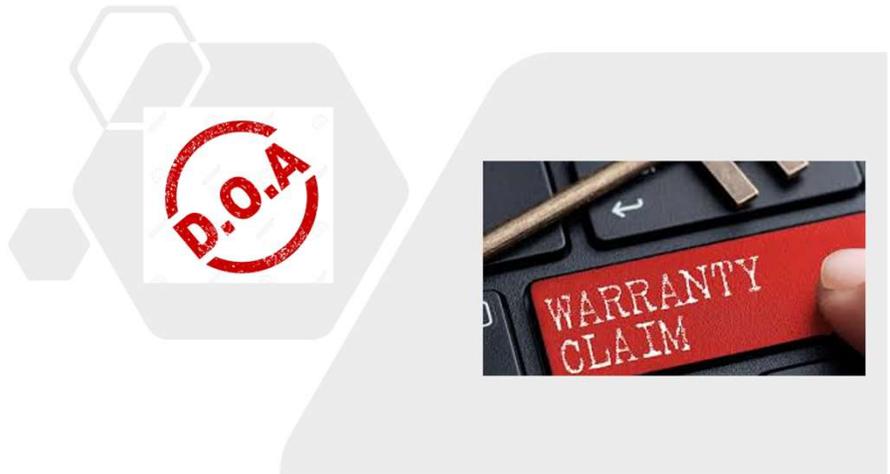


Warranty out of Stock Instructions



Warranty out of Stock

When a customer is inquiring about a warranty part it is our responsibility to find them the quickest solution especially when a part is out of stock or has an extended shipping lead time from the factory.

The following process is only used after you have looked for parts in RCD, ICIAW across the whole country. ICIB in all regional stores.

To do this, there are some additional steps and information that we must gather in order to assist the customer. We must take the initiative to acquire the information from the customer in order to assist them in a timely manner (right now). By being proactive in gathering the information we can speed up the process tremendously keeping everyone satisfied in an already frustrating time trying to get the parts needed or a resolution.

Warranty out of Stock

Goal:

- To be able to fulfill the customer's request with one phone call without sending them to multiple people during the process of needing a warranty part that is out of stock or has significant lead time

Warranty out of Stock

Information needed:

1. Customer name
2. Customer account number
3. Customer PO
4. Model number
5. Serial number
6. Equipment startup date
7. Part number
8. CE Order number
9. RCD PO number
10. Direct PO (yes or no)
11. RCD case number
12. Attach email from the RCD expedite team
13. Warehouse number where item ordered
14. Representative creating order & expedite

Once items 1-7 have been gathered we must verify warranty validation using ServiceBench

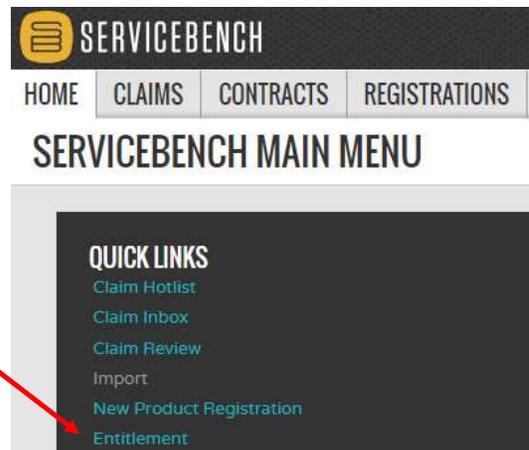
Collect all information in **Yellow** on the form prior to getting off the phone with the customer.

Warranty out of Stock

How to verify warranty validation.

When verifying warranty, we must keep in mind a proper registration and a subsequent owner. These items will also let us know if failed part “IS” or “IS NOT” a warranty part. A customer may think the part is in warranty but in fact it very well might not be a warranty part simply due to the equipment not being registered or not the original owner of said equipment.

1



Once logged into ServiceBench -> Entitlement

Warranty out of Stock

2

SERVICEBENCH
HOME CLAIMS CONTRACTS REGIS
SERVICE ADMINISTRATOR S

| Service Administrator |
|---|
| <input checked="" type="checkbox"/> CARRIER - Carrier Corporation |

Click check box

Enter serial number

3

SERVICEBENCH
HOME CLAIMS CONTRACTS REGISTRATION

ENTITLEMENT SEARCH

Service Administrator Carrier Corporation

Serial Number*

Model Number

First Name

Last Name

Phone

Service Contract Number

CHECK ENTITLEMENT

Install Date

Application Type

Warranty out of Stock

4

Enter serial number and click enter

SERVICEBENCH
HOME CLAIMS CONTRACTS REGISTRATIO

ENTITLEMENT SEARCH

Service Administrator Carrier Corporation

Serial Number*

Model Number

First Name

Last Name

Phone

Service Contract Number

CHECK ENTITLEMENT

Install Date

Application Type

5

Model will auto populate as seen

SERVICEBENCH
HOME CLAIMS CONTRACTS REGISTRATIO

Product History

ENTITLEMENT SEARCH

Service Administrator Carrier Corporation

Serial Number*

Model Number

First Name

Last Name

Phone

Service Contract Number

CHECK ENTITLEMENT

Install Date

Application Type

Warranty out of Stock

The below information will show with the completion of step 4 from previous slide

| | | | |
|----------------------------------|--|---------------------------|------------|
| Registration Id: | R264228616 | | |
| Product Name: | INFINITY SERIES VARIABLE SPEED HT PUMP | | |
| Model Number: | 25VNA048A003 | | |
| Discrete Model Number: | 25VNA048A0030040 | | |
| Serial Number: | 2417E12721 | Manufactured Date: | 06/13/2017 |
| Owner: | ARCHAMBO, LARRY | Shipped Date: | 06/22/2017 |
| Address: | 1817 SPEEDWAY AVE WICHITA FALLS, TX 76301 | Date Installed: | 06/29/2017 |
| Phone: | | Registration Date: | 07/03/2017 |
| Manufactured Date: | 06/13/2017 | | |
| Shipped Date: | 06/22/2017 | | |
| Date Installed: | 06/29/2017 | | |
| Registration Date: | 07/03/2017 | | |
| Date Transferred: | | | |
| Warranty Policy Code: | CP6 | | |
| Warranty Policy Description: | FOR SPECIFIC COVERAGE ON NON-REGISTERED UNITS INSTALLED IN OWNER OCCUPIED, NON-OWNER OCCUPIED AND COMMERCIAL APPLICATIONS, REFER TO WARRANTY CERTIFICATE | | |
| Mark As: | | | |
| Sold to Distributor Name: | South Central Distribution, Carrollton, LE | | |
| Sold to Distributor Number: | 41246 | | |
| Sold to Distributor City: | Carrollton | | |
| Sold to Distributor State: | TX | | |
| Replacement Of Model(s): | | | |
| Replacement Of Serial Number(s): | | | |

Warranty Claims Must Be Submitted Within 90 Days of the Repair Date Claims submitted beyond 90 days from the date of repair may be automatically rejected.

Warranty Information

| Brand | Application Type | Original Equipment Owner | Component Code | Warranty Length | Installed After | Warranty Start | Warranty Stop |
|-------|----------------------------|--------------------------|---------------------------|-----------------|-----------------|----------------|---------------|
| ALL | Owner Occupied Residential | Original | Enhanced Parts Warranty | 10 years | 01/01/2009 | 06/29/2017 | 06/29/2027 |
| | | | Exchange Product Warranty | 30 days | | | 07/29/2017 |
| Brand | Application Type | Original Equipment Owner | Component Code | Warranty Length | Installed After | Warranty Start | Warranty Stop |
| ALL | Owner Occupied Residential | Subsequent | Standard Parts Warranty | 5 years | 01/01/2012 | 06/29/2017 | 06/29/2022 |

Warranty out of Stock

It is important that we ask the customer “what is your homeowners name” rather we tell them who we show as the registered owner.

By doing so, it keeps everyone honest. Sometimes customers will attempt to help someone by manipulating the system.

- *If the ServiceBench registered owner matches what the customer told us, then we are to assume them as the original owner and said equipment will follow “Original Owner Warranty” of 10 years*
- *If ServiceBench registered owner DOES NOT match what the customer told us, then we are to assume them as the subsequent owner and said equipment will follow “Subsequent Owner Warranty” of 5 years*

Warranty out of Stock

Original Owner vs Subsequent Owner

is submitted beyond 90 days from the date of repair may be automatically rejected.

| Original Equipment Owner | Component Code | Warranty Length | Installed After | Warranty Start | Warranty Stop |
|--------------------------|---------------------------|-----------------|-----------------|----------------|---------------|
| Original | Enhanced Parts Warranty | 10 years | 01/01/2009 | 06/29/2017 | 06/29/2027 |
| | Exchange Product Warranty | 30 days | | | 07/29/2017 |
| Original Equipment Owner | Component Code | Warranty Length | Installed After | Warranty Start | Warranty Stop |
| Subsequent | Standard Parts Warranty | 5 years | 01/01/2012 | 06/29/2017 | 06/29/2022 |

RESIDENTIAL APPLICATIONS

This warranty is to the original purchasing owner and subsequent owners only to the extent and as stated in the Warranty Conditions and below. The limited warranty period in years, depending on the part and the claimant, is as shown in the table below.

| Product | Item | Limited Warranty (Years) | |
|---|------------|--------------------------|-------------------|
| | | Original Owner | Subsequent Owners |
| Air Conditioner or Heat Pump Condensing Unit | Parts | 10* (or 5) | 5 |
| | Compressor | 10* (or 5) | 5 |

* If properly registered within 90 days of original installation, otherwise 5 years (except in California and Quebec and other jurisdictions that prohibit warranty benefits conditioned on registration). See Warranty Conditions below.

From warranty card
of said example

* there may be discrepancies in names in instances such as landlord/tenant situations that may require some additional information needed for validation

Warranty out of Stock

Once it is identified that the said needed part is a warranty part then the next step is to acquire the expedite number and ship date from RCD

This process requires 4 to 6 hours. It is often the next business day before you will have an answer from RC to proceed.

Print the form and use it to help you follow up in the proper order with RC as it is more important to you than it is them.

Save the form on your computer so you can email to Customer Assurance if needed.

Transition from old to NEW process

In the next few slides there will be reference to fill out section # on the WOS form.... (transition process)

Collecting information on the old paper form or fillable PDF document may be necessary in the beginning so that all of the information gets submitted on the website form, so that nothing gets lost in translation.

If you find it easier by only doing it on the website form, then do so. We just need to make certain all information is provided accurately during the transition.

How to acquire an RC Expedite

- ▶ Verify part availability in RC Community.
- ▶ If not available collect sections 1 & 2 on the attached form from the customer
- ▶ Create an order in NXTrend
- ▶ Create a PO that is “04 Expedite”
- ▶ Transmit the PO and add the PO to the form in section 3.
- ▶ Wait about 1 hour – Go to RC Community and search the PO#
- ▶ It should have the RC Order number there. Add that RC order # to section 3 of the WOS Form.
- ▶ Go to Home in RC Community and select Contact Customer Service.
- ▶ Complete the form with the information on the WOS form.
- ▶ You will receive a Case # from RC. Add that case number.
- ▶ Call RC (315) 432-7278 and request an Expedite number. All information requested is on the WOS form you are working with.
(When asked how many systems on the home the answer is 1)
- ▶ Add the expedite number to the attached form in the proper location.
- ▶ If greater than 7 days for the part to ship complete and submit the WOS Form from the <https://cemstraining.com/>

Warranty out of Stock

****IMPORTANT****

If you have not yet registered for the CEMS Technical Support website, you **MUST** do so in order to log in and complete the WOS Form. The “old Google” form will be going away.

<https://cemstraining.com/>

Once registered and logged in, navigate to the following page:

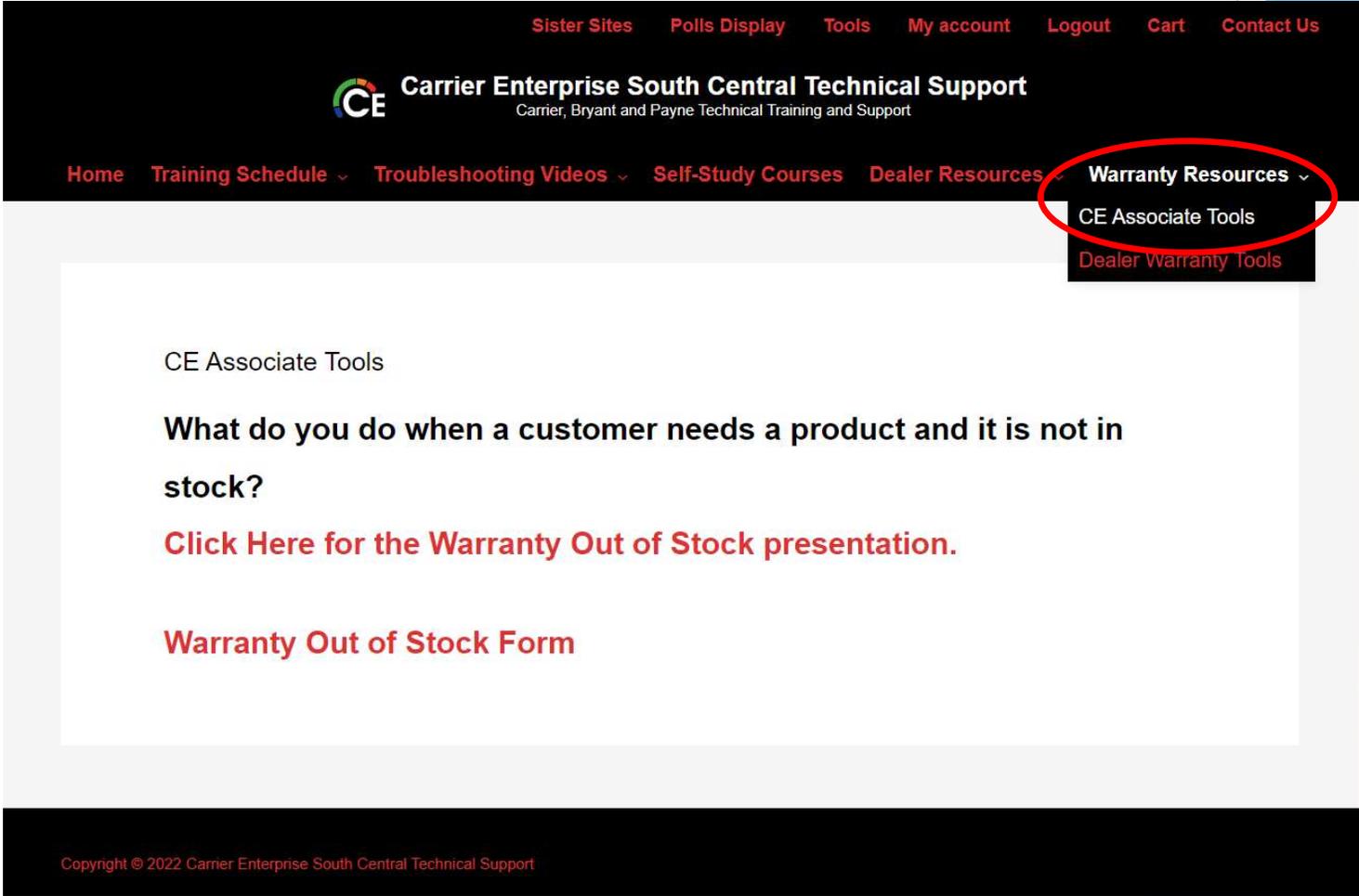
Home Page

>Warranty Resources

>CE Associate Tools (You can also find a copy of this presentation on the CE Associate Tools page)

>Warranty Out of Stock Form

Warranty out of Stock



Sister Sites Polls Display Tools My account Logout Cart Contact Us

CE Carrier Enterprise South Central Technical Support
Carrier, Bryant and Payne Technical Training and Support

Home Training Schedule ▾ Troubleshooting Videos ▾ Self-Study Courses Dealer Resources ▾ **Warranty Resources ▾**

- CE Associate Tools
- Dealer Warranty Tools

CE Associate Tools

What do you do when a customer needs a product and it is not in stock?

[Click Here for the Warranty Out of Stock presentation.](#)

[Warranty Out of Stock Form](#)

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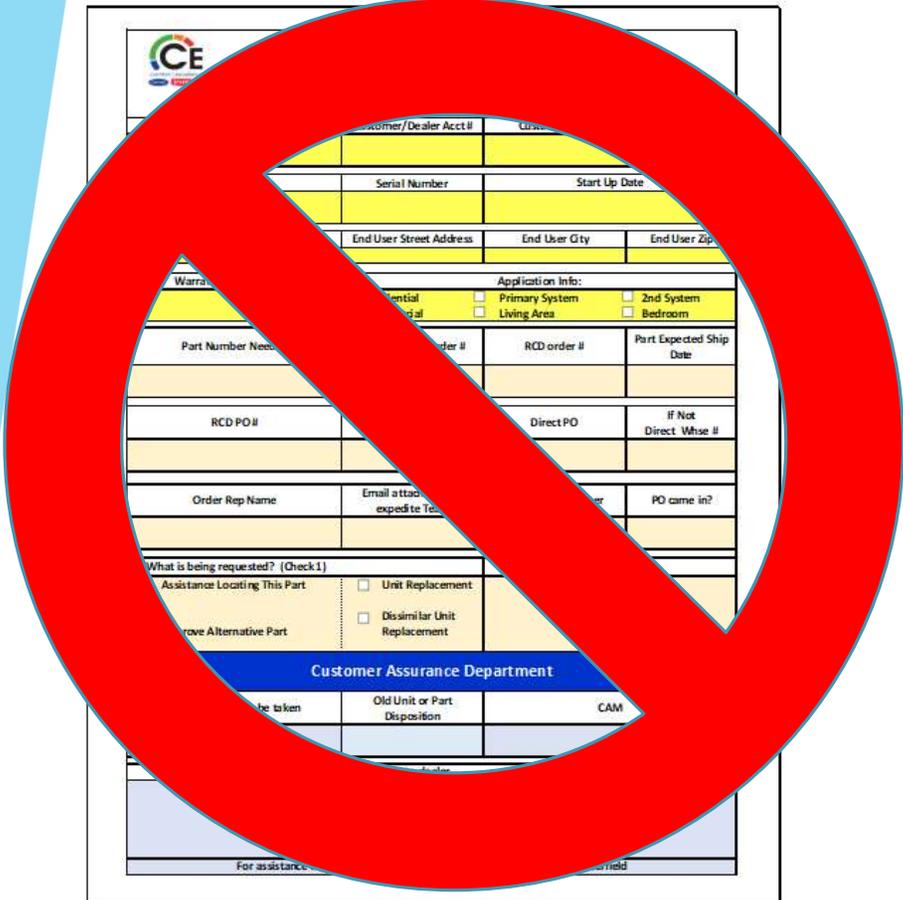
Warranty out of Stock

Complete the ENTIRE “WOS Part Expedite Order Form” and submit.

Once submitted the form will automatically be sent to the below group email box:

ms.techsup@carrierenterprise.com

Warranty out of Stock



The image shows a warranty form from the Customer Assurance Department. The form is partially obscured by a large red 'X'. The visible sections of the form include:

- Customer/Dealer Acct #** and **Customer #**
- Serial Number** and **Start Up Date**
- End User Street Address**, **End User City**, and **End User Zip**
- Application Info:**
 - Residential
 - Primary System
 - 2nd System
 - Living Area
 - Bedroom
- Part Number Needed**, **Order #**, **RCD order #**, and **Part Expected Ship Date**
- RCD PO #**, **Direct PO**, and **If Not Direct Whse #**
- Order Rep Name**, **Email attached expedite Tech**, and **PO came in?**
- What is being requested? (Check 1)**
 - Assistance Locating This Part
 - Unit Replacement
 - Provide Alternative Part
 - Dissimilar Unit Replacement
- Customer Assurance Department**
- Time taken**, **Old Unit or Part Disposition**, and **CAM**

The NEW website submission method is much easier! Once you have submitted the form you will receive an email with the form for your records.

This old form will no longer be used going forward as the NEW method is now live.

The Website Form

Warranty Out Of Stock (WOS)

Step 1 of 4

Your Name *

First

Last

Your Phone Number *

Callback Number If Different

Customer / Dealer Name *

Customer / Dealer Account # *

6 of 6 max characters.

Customer / Dealer PO for this order *

Customer/Dealer Contact Name *

Customer / Dealer Phone *

Dealer / Customer Contact Email *

Next

[Save and Resume Later](#)

The Website Form

Warranty Out Of Stock (WOS)

Step 2 of 4

Equipment Model Number

Equipment Serial Number *

Startup Date *

End User Name *

First

Last

For warranty verification

Address *

Address Line 1

City

State

Zip Code

Are there any health concerns, infants, elderly.....etc

- Yes
 No

Application Type *

- Residential
 Commercial
 Industrial
 Other (explain in notes)

Area Being Served

- Primary System (Single System home or Building)
 Living Area
 Bedrooms
 2nd Floor
 Other

Did you verify warranty? *

- Yes
 No
 I don't know how.

Previous

Next

[Save and Resume Later](#)

Warranty Out Of Stock (WOS)

Step 3 of 4

Part Number Needed *

ID10T

Part Description *

Control Board

CE Order # (In Trend) *

123456

RC Order # *

654321

RC PO # *

987456

RC Expedite # **

852258

Date Part Expected from RC *

09/16/2022

If they will not provide a date select 3 months out.

Is this being shipped direct to customer? *

Yes

No

What is being requested? Check all that apply. *

Assistance Locating This Part

Approve or Locate an Alternative Part

Approve a Replacement Unit

Other - Add notes for this

Description

This is a TEST

Please add notes to assist us in helping with this situation.

Previous

Next

[Save and Resume Later](#)

The Website Form

The Website Form

Warranty Out Of Stock (WOS)

Step 4 of 4



Previous

Submit

[Save and Resume Later](#)

After submitting the form, you will receive an email in this format for you records



Warranty Out Of Stock (WOS)

Thank you for submitting this WOS form! We will be in touch with you shortly.

Your Name

John Smith

Your Phone Number

(214) 987-1234

Callback Number If Different

Empty

Customer / Dealer Name

CESC

Customer / Dealer Account #

123456

Customer / Dealer PO for this order

W9876321

Customer/Dealer Contact Name

Brian Smith

Customer / Dealer Phone

(214) 254-9853

Dealer / Customer Contact Email

sc.techsupport@carrierenterprise.com

Warranty out of Stock

With this information Customer Assurance can then:

1. Contact RC for emergency stock that is not shown as available.
2. Locate alternative parts from RC.
3. Receive authorization for 3rd party parts to use for replacement.
4. Receive authorization for a replacement unit.