Autosoft DMS

Ford One Warranty Solution

Autosoft®
Dealer Management System

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Autosoft, Inc.
61 Executive Court
West Middlesex, PA 16159

www.autosoftdms.com

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Table of Contents

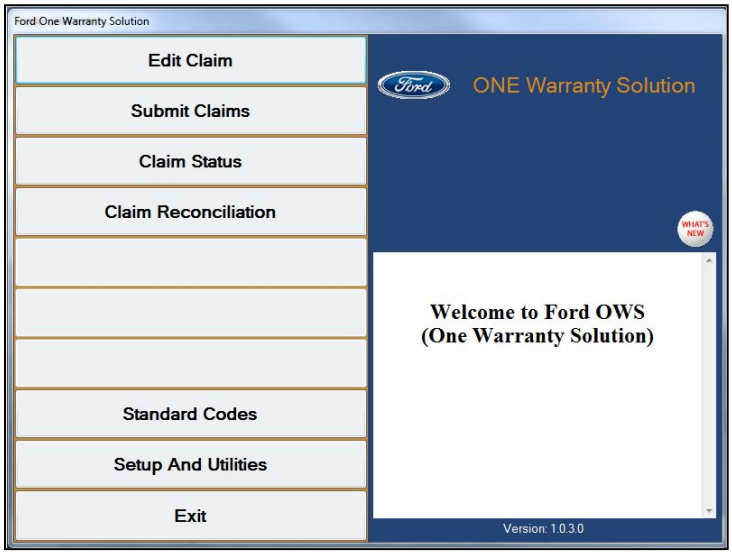
Introduction Ford Warranty 1
Help Screens 2
Chapter 1 System Parameters 3
Verifying Advisor Setup 3
Verifying Technician Setup 3
Warranty Parameters 4
Ford OWS Setup 5
Accessing Ford OWS Setup 5
Verifying System Settings 6
Adding Dealer Information 7
Updating Advisor and Technician Information 8
Chapter 2 Repair Orders 9
Start Repair Order 9
Start Conditions 10
Retrieving OASIS 10
Close Service - Ford Warranty Screen 12
Labor Time Guides 15
Verifying System Requirements 15
Using the Labor Time Guides 15
Parts 17
Sublet 17
Review & Print 17
Applying Tax 18
Printing and Closing the Repair Order 18
Chapter 3 Processing Claims Using Ford OWS 19
Edit Claim 19
Editing a Claim 20
Removing a Repair 23
Deleting an R/O 23
Editing General Information 24
Editing Comments 25
Editing Labor 26
Adding Labor 26
Editing Labor 26
Deleting Labor 26
Adding Sublet 27
Editing Sublet 27
Deleting Sublet 27
Editing Codes 27
Adding Codes 28
Editing Codes 28
Deleting Codes 28

Adding Approval Codes 28
Editing Approval Codes 28
Deleting Approval Codes 28
Editing Parts 29
Editing a Part 29
Adding a Part 29
Removing a Part 30
Editing Miscellaneous Expenses 30
Editing a Sublet 30
Adding a Sublet 31
Removing a Sublet 31
Editing Pricing 31
Verifying Totals 32
Submitting Claims 32
Viewing Claim Status 33
Searching By Date 33
Searching By R/O Number 34
Printing the Claim Status Summary 34
Understanding Status Codes 34
Reconciling Claims 35
Searching By Date 35
Searching By R/O Number 36
Resending Files to Accounting 37
Cleaning Warranty Files 38
Restoring Reconciliations 38
Conclusion 39

Introduction Ford Warranty

The Service Writing module in Autosoft FLEX DMS is designed to allow dealers to generate Ford-specific warranty repair orders. The repair orders are created using the standard R/O entry through the Repair Orders menu. This manual does not provide systematic instructions for generating the repair order from beginning to end. For detailed information about each entry screen used to generate repair orders, refer to your Autosoft FLEX DMS Service Writing user's guide. This manual only explains the fields and screens that are required in addition to the standard R/O entry screens.

Once the warranty claims are generated, Ford dealers use the Ford One Warranty Solution program to enter additional Ford warranty information. After you have entered the information, you can view, print, and download it to Ford as needed.



This manual is divided into three chapters to help you generate your Ford warranty claims. You should read the information is each chapter before attempting to generate the claims. As always, if you have any questions, contact the Autosoft Customer Support Center at 800.473.4630 to speak with a Support representative.

Chapter	Information Covered
Chapter 1 **System Parameters**	Chapter 1 walks you through entering setup parameters that will be used to generate the warranty claims. Parameters need to be set in the Service Writing System Setup and in the Ford Warranty Entry module.
Chapter 2 **Repair Orders**	Chapter 2 explains specific information that is required when generating repair orders using the Repair Orders menu. This chapter will not cover every entry screen used to generate the repair order. It only covers the fields or additional entry screens needed for Ford warranty claims.
Chapter 3 **Processing Claims through Ford OWS**	Chapter 3 walks you through each menu option in the Ford OWS program. These options include reviewing the warranty claims, downloading files to Ford, and viewing claim status.

Help Screens

Because FLEX DMS is continuously changing to meet the needs of our customers, we periodically add new features to the software. These changes will include the addition of fields, buttons, or screens. This manual represents the program as it is now.

To keep our documentation updated, and our users informed, we have added individual Help pages to each screen in the program. Press F1 to display the Help page for the current screen or menu. Each page provides the following pieces of information:

- A description of the screen,
- Basic instructions for using the screen,
- A list of the fields on the screen and an explanation of the information required in each field,
- A list of the buttons on the screen and instructions for using each button, and
- A list of the function keys you can use to carry out commands on the screen.

These Help pages are updated as changes are made to the program and added to your system when you run an Internet update; thus, the Help pages are always current. You should become familiar with the Help page feature and use it to learn about the new information added to the program and as a way to quickly access information while you are on a screen.

Chapter 1 System Parameters

Before you can use the Service Writing or the Ford Warranty Entry modules, you must enter parameters. The parameters determine default information used when creating the repair orders.

Verifying Advisor Setup

You must verify that your advisors are set up in the FLEX DMS Service Writing module according to Ford guidelines. You must enter the advisor's manufacturer employee ID. The ID consists of the last four digits of the advisor's social security number. The ID must be entered because it is required by Ford.

1. If necessary, double-click the **ASI DMS** icon to open the program.
2. Click **Service** on the FLEX DMS startup menu.
3. Click **System Setup** on the Service Writing menu.
4. Click **Service Advisors/Writers** on the System Setup menu. The Advisor/Writer Information screen opens.
5. Click the advisor in the list on the right side of the screen. The advisor's information populates the screen.
6. Verify that the advisor's employee ID appears in the **Emp ID** field next to the **MFC** code **FO**. Enter the code if it is missing. The ID consists of the last four digits of the advisor's social security number and the advisor's initials.
7. Click **Save** to save the changes.
8. Edit the remaining advisors' records as needed.
9. When you are finished, click **Exit** to return to the System Setup menu.

Verifying Technician Setup

You must verify that your technicians are set up in the FLEX DMS Service Writing module according to Ford guidelines. You must enter the technician's manufacturer employee ID. The ID consists of the last four digits of the technician's social security number. The ID must be entered because it is required by Ford.

1. Click **Service Technicians** on the System Setup menu. The Technician Information screen opens.
2. Click the technician in the list on the right side of the screen. The technician's information populates the screen.

3. Verify that the technician's employee ID appears in the **Emp ID** field next to the **MFC** field (containing the manufacturer code **FO**). Enter the code if it is missing. The ID consists of the last four digits of the technician's social security number.

4. Click **Save** to save the changes.

5. Edit the remaining advisors' records as needed.

6. When you are finished, click **Exit** to return to the System Setup menu.

Warranty Parameters

The first parameters that you must set are the warranty parameters. The information entered here determines default entries that will be used when creating the Ford warranty repair orders.

1. Click **System Setup** on the Service Writing menu.

2. Click **Warranty Parameters** on the System Setup menu.

3. Click **Ford Warranty Parameters** on the Warranty Parameters menu. The Ford Warranty Parameters screen opens.

4. In **Download Ford Warranty Repairs To Fordstar**, indicate if you want to download the warranty repairs to FordStar. Type **Y** for yes or **N** for no. You must type **Y** in order to access the Ford Warranty program.

5. In **Warranty Default Parts Source**, type the inventory source (1 through 9) for Ford parts.

6. In **Warranty Default Labor Rate**, type the letter (A through J) that corresponds with the labor rate for warranty repairs. (Labor rates are defined in System Setup under Labor/Warranty/Tax Rates.)

7. In **Warranty P & A Code**, type your dealership's warranty parts and accessories code.

8. Leave the **Sub P & A Code** field blank (for U.S. and Canadian dealers).

9. Use the **Warranty Sale is Normally Taxed by your State** field to indicate if your state taxes warranty sales. Type **Y** for yes or **N** for no according to state guidelines.

10. Next, type the country code in the field provided.

11. Type your Ford OASIS user ID. This is required to access OASIS information.

12. Type **Y** in the **Use Ford OWS to Download Warranty Repairs to Ford** field. You must type **Y** to download warranty claims using OWS.

13. Click **Save** to save the parameters.

14. Click **Exit** to return to the System Setup menu, and click **Back** to return to the Service Writing menu.

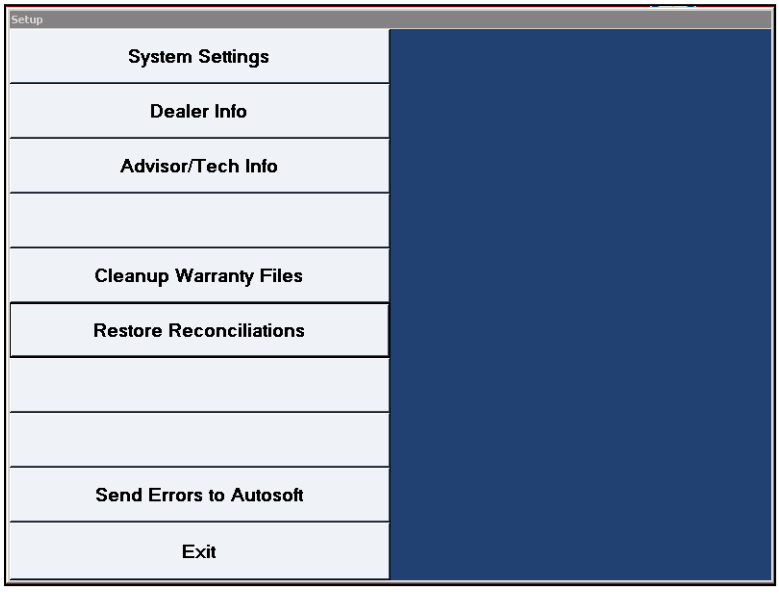
Ford OWS Setup

The next parameters you need to enter are for the Ford OWS program. The parameters consist of setting passwords, entering FDC codes, and verifying advisor and technician information.

Accessing Ford OWS Setup

1. Click the **Ford OWS** icon on the desktop.

2. Click **Setup And Utilities** on the Ford OWS main menu. The Setup menu opens.

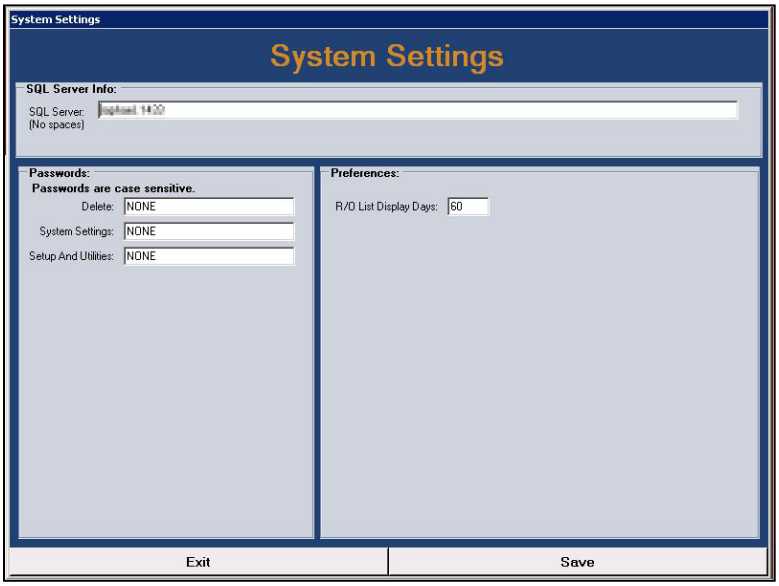


Verifying System Settings

The System Settings is where you verify your SQL Server information. You are prompted to add the SQL server information the first time you access the Ford OWS program. However, if you make changes to your SQL Server, you will need to use this screen to edit the information as needed. Your network administrator should be able to verify this information. You should not make changes on this screen without consulting your network administrator since this information affects your connection to Ford.

You also use this screen to set passwords. You can set a password for deleting files, for accessing the System Setup screen, and accessing the Setup & Utilities menu. If you choose to set a password for deleting files, Autosoft recommends that you also set a password to access this screen.

1. Your SQL server information will display in the **SQL Server** field. Verify this information is correct. Do not make changes to this information without consulting your system administrator.



2. In **Delete**, type the password required to delete files (jobs and repair orders). This is an optional entry. Passwords are case sensitive.

3. If you choose to set a password for deleting files, Autosoft recommends that you also set a password to access this screen using the **System Settings** field. Type the password you want to use. Passwords are case sensitive.

4. In **Setup & Utilities**, type the password required to access the Setup & Utilities menu. This is an optional entry. Passwords are case sensitive.

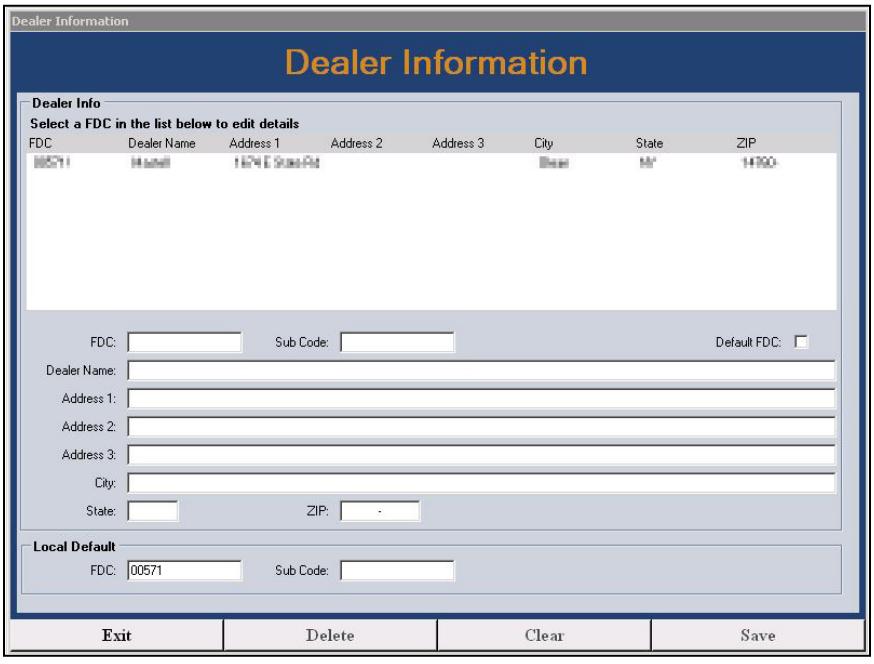
5. Use the **R/O List Display Days** to indicate how long you want repair orders to remain in the RO list. The default entry is 60. After the days set, the repair order will drop from the list, but you can still access it by typing the repair order number in the **Repair Order No** field on the job Header Details screen.

Important: Changing the display days to a number greater than 60 days may cause the system to run slowly depending on the number of repair orders the system must load.

6. Click **Save** to save the information (or **Exit** to close the screen without saving the changes).

Adding Dealer Information

You use the **Dealer Info** option to enter your dealership's name, address, and FDC codes. You can set a default FDC code for each workstation. The first time you open the Ford OWS system, this screen appears. If you do not enter the dealer information at that time, you must return to this screen to add the information.



1. Type the parts and accessory code and subcode.

2. The **Default FDC** code box allows you to set the default FDC code for the workstation. Click to select the box to set the FDC code as the default, or leave the box blank if this is not the default FDC.

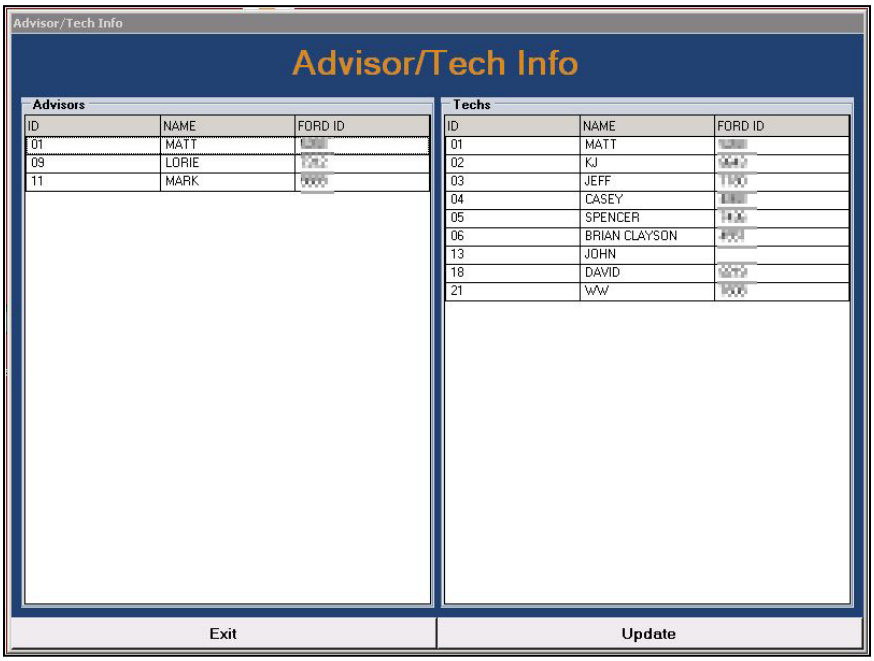
3. Type your dealership's name, address, city, state, and ZIP Code.

4. Click **Save**.

Updating Advisor and Technician Information

This screen displays the advisor and technician information that pulled from your FLEX DMS. Since the information transfers with claims, it is important that they information is correct. However, you cannot edit information here. You must edit the information in your DMS and use the **Update** button to pull the edited information to the Ford OWS program.

1. Click **Advisor/Tech Info**. The Advisor/Tech Info screen appears.



2. The left side of the screen displays the advisor information, and the right side of the screen displays the technician information.

3. Click **Update** to update the information from your FLEX DMS. The system connects to your DMS and pulls the information to the screen.

Chapter 2 Repair Orders

To generate repair orders, you will use the six buttons on the left side of the Repair Order menu. You will generate the repair order as explained in your FLEX DMS Service Writing user's guide. This chapter only explains the additional information needed when generating Ford warranty claims. It will address the Start Repair Order screen, Close Service screen, and Review & Print screen. No special instructions are required for the Enter Conditions, Lubricants/Sublets, or Close Parts screens.

Start Repair Order

When you are entering the repair order information on the first entry screen, ensure that the **Warranty Manufacturers** field contains **FO** for Ford warranty claims. Use the drop-down menu to select the manufacturer as needed.

Tip: You can set the default manufacturer for warranty claims in the Service Writing System Setup. Click **Miscellaneous Parameters**. Select **FO-Ford** for the **Default Manufacturer Warranty Repairs Prompt** field, and the **Warranty Manufacturers** field on the Start Repair Order screen will automatically default to **FO** for every repair order.

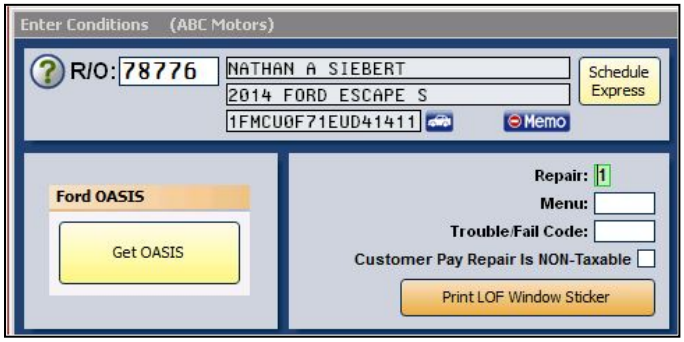
Start Conditions

The Enter Conditions screen integrates with OASIS, so you can retrieve and view OASIS as you are creating the repair order. The information displays on your screen, and you can print the information to send with the warranty claim.

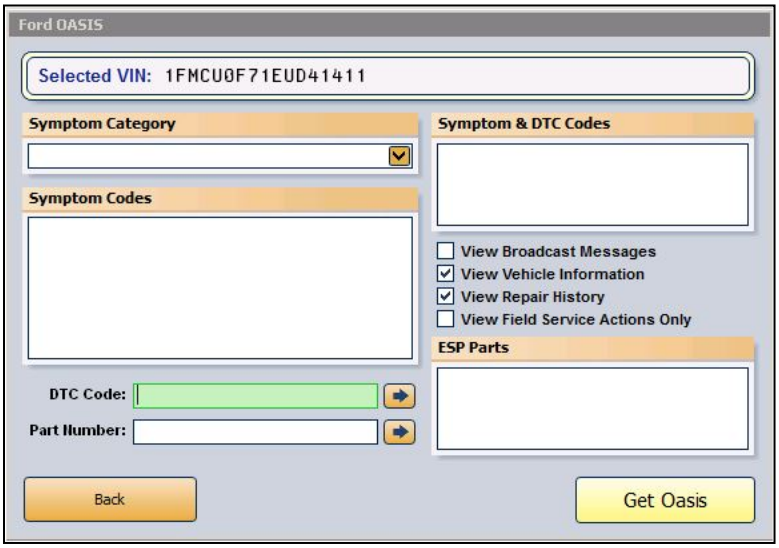
Tip: If the vehicle is 10 years old or more, Ford may not return OASIS data through the Autosoft integration but may provide the data directly from the Ford website. Therefore, if the Autosoft OASIS report returns no data, pull the OASIS report from Ford website.

Retrieving OASIS

1. The **Get OASIS** button appears on the left side of the screen. It is yellow to indicate it is standby mode.

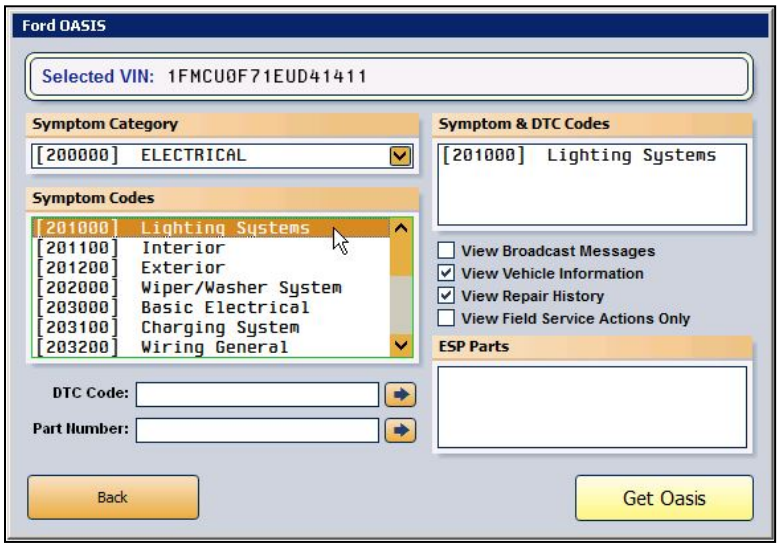


2. Click the button to open the Ford OASIS screen.



3. On the screen, use the **Symptom Category** list to select the appropriate category.

4. When you select a category, the **Symptom Codes** window displays the possible symptom codes. Click the code you want to select. When you click a code, it appears in the **Symptom & DTC Codes** window. You can select multiple codes as needed. You must select at least one code to retrieve OASIS.



5. In **DTC Code**, type the appropriate code, and click the **arrow** button to add it to the **Symptom & DTC Codes** list window.

6. In **Part Number**, type the part number for the repair, and click the **arrow** button to add the part to the **ESP Parts** window. You can add multiple parts as needed.

7. Use the “View” boxes to select the information you want to pull. Click a box to select it. A checkmark appears in the box to indicate it is selected. Click a box again to clear it.

8. Once the information on the screen is complete, click **Get Oasis**.

9. When the information is ready, the button turns green and reads, "**View Oasis**."

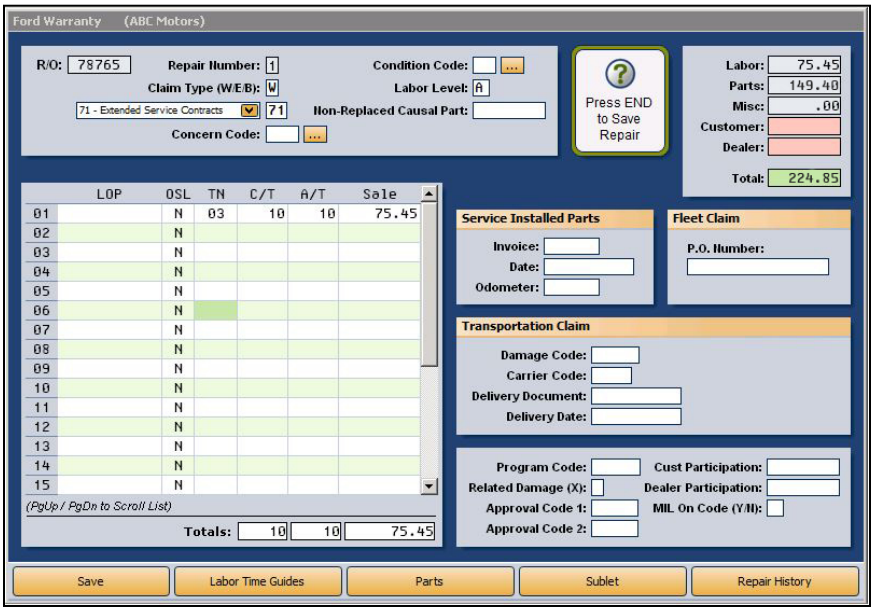
10. Click the button to view the information, and the information is displayed on your screen. In the Print dialog, select your printer, and click **Print**.

11. Click **Back** to close the viewing screen.

12. Click **Back** to close the Oasis screen.

Close Service - Ford Warranty Screen

When you close a service repair for a warranty claim on the Close Service screen, the Ford Warranty screen automatically opens so you can enter additional information for the claim. If the warranty screen does not appear, the **Warranty Manufacturers** field on the Start Repair Order screen does not contain **FO** for Ford. You must edit the field before you can open the warranty screen.



1. The fields in the top-right corner display the total cost of labor, parts, and miscellaneous expenses. They also display the total customer and dealer participation. The system recalculates these values as you add information on the screen.

2. The **Repair Number** field automatically fills in with the appropriate repair number.

3. Type any additional information in each field. The table on the following page lists all of the fields on the Ford Warranty screen and identifies the information required in each field. Use it to assist you when filling in the screen.

4. Use the **Labor Time Guides** button to select labor operations for the repair order. (See page 15 for instructions on using the labor time guides.)

5. Use the **Parts** button to enter part information. (See page 17 for instructions on adding part information.)

6. Use the **Sublet** button to enter sublet information as needed. (See page 17 for instructions on adding sublet information.)

7. Click **Save** when you are finished entering information. The system returns you to the Close Service screen so you can close more repairs as needed.

Field	Information Required/Displayed
R/O	This field displays the repair order number.
Repair Number	This field displays the repair number for the selected repair.
Claim Type	Indicate the claim type. Type **W** for warranty and policy service repair, **E** for extended service protection repairs, or **B** for warranty policy body repairs. **It is important that you flag the claim correctly to ensure the sale goes to the correct account in the Accounting module.**
Claim Type (Unlabeled list)	Select the claim type from the list. • A1: Appeal • 11 - Vehicle Coverages • 12 - Pre-Delivery Inspection • 13 - Policy • 14 - Mis-built • 21 - Service Parts • 22 - Over the Counter • 23 - Accessories • 31 - Field Service Action • 51 - Transit Damage • 61 - Fleet • 71 - Extended Service Contracts
Customer Concern Code	This field displays the customer complaint code entered on the Enter Conditions screen. Edit or add the entry as needed. The system will displays a list of concern codes if this field is blank and you press ENTER while the cursor rests in this field. This is a required entry for repair types 01, 03, and 04.
Condition Code	This field displays the trouble/condition code entered on the Enter Conditions screen. Edit or add the entry as needed. The system will displays a list of condition codes if this field is blank and you press ENTER while the cursor rests in this field.
Labor Level	This field displays the labor level entered on the Enter Conditions screen. Edit or add the entry as needed.
Non-Replaced Causal Part	Type the part number for the non-replaced causal part, if applicable.
Line	These fields indicate the line number for each repair. You can have up to 25 labor lines per repair.
LOP	Type the factory labor operation number, or click **Labor Time Guides** to use the Ford Labor Time Guides to select the labor operation.
OSL	Indicate if outside labor was used for the labor line. The field defaults to **N** for no. If you type **Y** for yes, the system bypasses the **TN** (technician) field
TN	This field displays the technician ID for the technician assigned to the repair.
C/T	This field displays the chargeable labor units.
A/T	This field displays the actual time units. This field automatically defaults to the chargeable time but can be edited as needed.

Field	Information Required/Displayed
Sale	This field displays the sale amount. It is calculated based on the units of time entered in the **C/T** field. This field can be edited as needed.
Totals	These fields display the total chargeable labor units, total actual time units, and total sale amount.
Service - The fields in this section only need to be completed for parts warranty.	
Invoice	Type the original R/O number from when the parts were first installed.
Date	Type the date when the parts were first installed.
Odometer	Type the accrued mileage since the time the part was first installed.
Fleet Claim	
P.O. Number	If this is a fleet claim, type the purchase order number in this field.
Transportation - The fields in this section only need to be completed for transportation claims.	
Damage Code	Type the damage code that indicates the type of damage.
Carrier Code	Type the code for the carrier who delivered the vehicle or part.
Delivery Document	Type the delivery document number.
Delivery Date	Type the delivery date.
Miscellaneous Information	
Program Code	Type the program code. This is an optional entry.
Related Damage (X)	Type an **X** if there was related damage.
Approval Code 1 and **2**	Type the authorization code. These are optional entries.
Cust Participation	Type the amount the customer is paying toward the repair.
Dealer Participation	Type the amount the dealer is paying toward the repair.
MIL On Code (Y/N)	Indicate if the malfunction indicator light came on. Type **Y** for yes or **N** for no.

Labor Time Guides

The **Labor Time Guides** button on the bottom of the Ford Warranty screen opens the Ford Labor Time Guide. This feature allows you to search for labor operations and pull the labor operations to the warranty repair order. You must have a Ford Service Labor Time Standard CD in the CDROM drive in order to access the Ford Labor Time Guide.

Verifying System Requirements

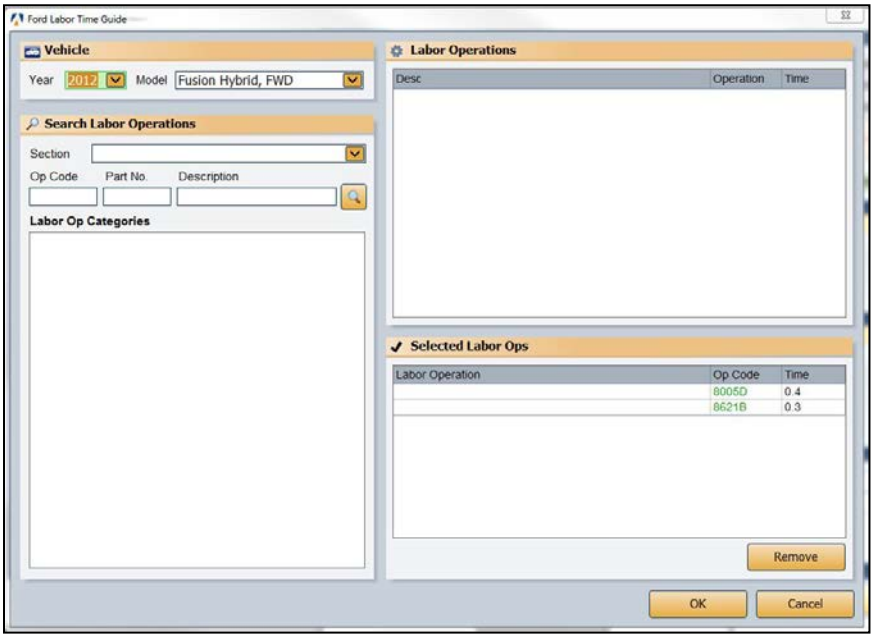
In order to use the Ford Labor Time Guides with Autosoft's FLEX DMS, your system must meet the following requirements:

- Microsoft® Windows® XP, Windows 2000 with Service Pack 2 and later, or Windows 98. (Windows NT® 4.0 is not supported.)
- Microsoft Data Access Components (MDAC) version 2.6 or higher.
- Microsoft OLE DB Provider for Visual FoxPro®.

You can find links to download Microsoft Data Access Components and Microsoft OLE DB Provider for Visual FoxPro from Microsoft on the Help page for the Ford Warranty screen. Press F1, and click the system requirements link.

Using the Labor Time Guides

1. Click **Labor Time Guides** on the bottom of the Ford Warranty screen. The Ford Labor Time Guide opens.



Note: If you receive a run-time error indicating, "Provider cannot be found. It may not be properly installed," you do not have Microsoft OLE DB Provider for Visual FoxPro.

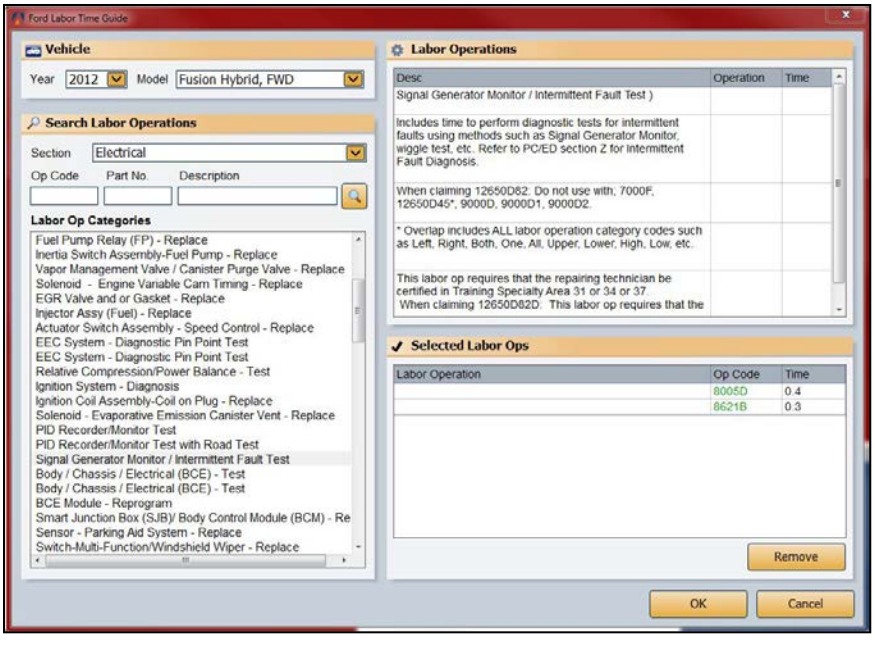
2. The **Year** automatically displays the model year entered for the vehicle on the repair order.

3. Select the vehicle model from the **Model** list.

4. The **Search Labor Operations** section allows you to search for labor operations. You have four search options:
   - Use the **Section** list to select a section of the vehicle. The bottom of the screen lists the labor operation categories for the selected section.
   - In **Op Code**, type an operation code, and click . The bottom of the screen displays the labor operation categories for the code you typed.
   - In **Part No.**, type a part number, and click . The bottom of the screen displays the labor operation categories for the part number you typed.
   - In **Description**, type a word or phrase, and click . The bottom of the screen displays all of the labor operation categories that contain the word or phrase you typed.

5. Under **Labor Operation Categories**, click a category to view the details for the labor operation.

6. The information displays in the top-right window under **Labor Operations**. Click a labor operation to select it. The code appears under **Selected Labor Ops**.



Tip: To remove a selected labor operation, click the labor operation, and click **Remove**.

7. Continue to select labor operations by repeating steps 4-6.

8. When you are finished selecting the labor operations, click **OK** to pull them to the warranty R/O.

Parts

Clicking **Parts** on the Ford Warranty screen opens the Edit Parts screen. This screen is used to edit parts on the warranty repair order. You can use this screen to switch parts between conditions and to mark the failed part.

1. The top of the screen lists all of the parts on the repair order, and the bottom-right side of the screen lists all of the conditions.

2. Click a part in the list. The part number fills in the first field at the bottom of the screen, and the **Condition** field indicates the corresponding condition number.

3. Edit the Condition field if you need to assign the part to a different condition. You can select a condition by clicking on the condition in the list on the bottom-right side of the screen. The condition number will fill in the Condition field.

4. Use the buttons next to the **Failed Part** field to indicate if the selected part is the failed part. Click **Yes** to mark the failed part, or click **No** to mark the remaining parts.

5. Click **Back** to return to the Ford Warranty screen.

Sublet

Clicking **Sublet** on the Ford Warranty screen opens the Sublet screen. You use this screen to edit sublet information for the warranty repair.

1. The fields at the bottom of the screen display the sublets added to the repair order. The information pulls from the information entered on the Lubricants/Sublet screen.

2. Click in a field, and edit the information as needed.

3. Click **Save** to save the changes.

4. Click **Exit** to return to the Ford Warranty screen.

Review & Print

When all of the information has been closed on the repair order, close and print the repair order as needed. Some of the information on this screen automatically populates based on information entered on previous screens. Verify the information is correct.

Applying Tax

You use the **Warranty Taxable** field to indicate if you want to tax the warranty. If you select **Warranty Taxable** on the review & Print screen, the tax *does not* carry over to Autosoft Ford Warranty program. You will have to add the tax to the Miscellaneous Expense screen.

Items applied to repair orders on Lubricant/Sublet screen will carry over to the Miscellaneous Expenses screen in the Autosoft Ford Warranty program. There are two ways to apply tax to these items. One option is to apply the tax to the warranty by selecting the **Warranty Taxable** option on the Review & Print screen. Then, you must manually add the tax to the Miscellaneous Expenses screen in the Autosoft Ford Warranty program when processing the claim.

Your second option is to create a sublet entry that you will use as the tax option. You will do this using the Default Sublet Entries screen in the Service Writing setup. Type **TAX** in the **Labor Operation** field, and specify the correct sale, cost of sale and inventory tax accounts for Accounting in the **Account For Sale**, **Account For Cost**, and **Account For Inventory** fields. Apply this sublet to the claim that requires tax. Make sure it is flagged non-taxable so you do not tax the claim twice. When apply the tax using the sublet code, do not select the Warranty Taxable option on the Review & Print screen. The system will apply the tax to the Miscellaneous Expenses screen in the Autosoft Ford Warranty program.

Printing and Closing the Repair Order

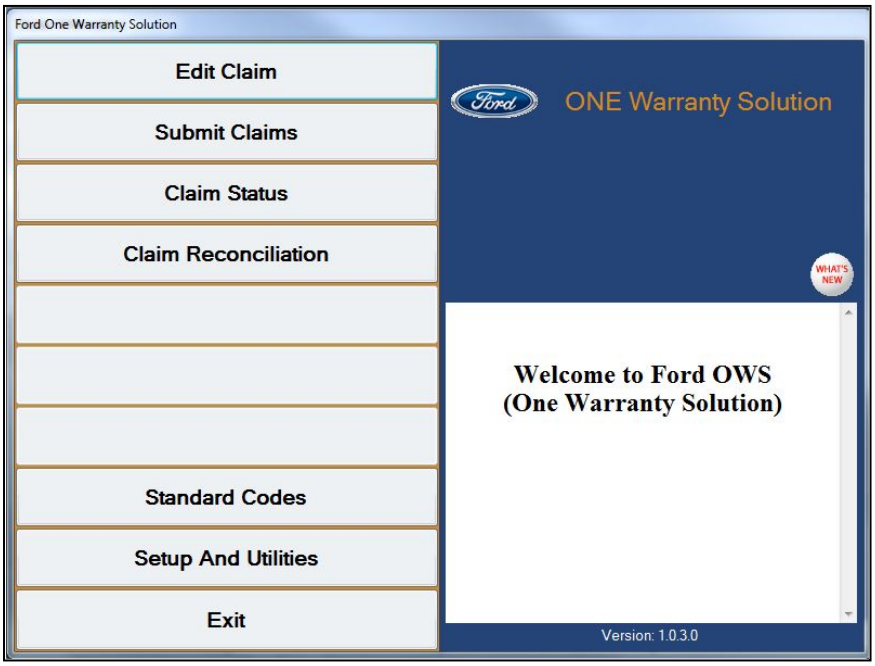
When you are finished entering and verifying the information on this screen, click **Print**. The system prompts you to indicate what you want to do with the repair order. In order to send the warranty claim to Ford Warranty Entry, you ***must*** choose **Y**, **P**, **C**, **I**, **W**, or **M**. If you choose **N** for no action, the warranty claim remains in the Repair Orders list. It is not available in Ford Warranty Entry. Click the button that corresponds to the print/close option you want to select. The system prints the appropriate copy and closes the repairs accordingly. The warranty claim is now available in the Ford Warranty Entry program for further review and editing.

- Select **Y-Print & Close R/O** if the warranty repairs are the only repairs on the repair order. This closes all of the repairs.
- Select **P-Print & Close C/P** if there are internal or customer pay repairs on the repair order. This closes the internal or customer pay repairs and leaves the warranty repairs open.
- Select **C-Customer Copy** to print the customer copy of the repair order without closing any of the repairs.
- Select **I-Invoice R/O** to invoice the repair order Cashier. This closes all of the repairs, but no copies print. The repair order cannot be recalled in the Service Writing module.
- Select **W-Invoice C/P** to invoice just the customer pay and internal repairs to Cashier. This closes the customer pay and internal repairs, but leaves the warranty repairs open. No copies print.
- Select **M-Print Memo** to print a memo copy of the repair order without closing any of the repairs.

Tip: Although options **P**, **C**, **W**, and **M** send claims to the Ford Warranty Entry program, the repairs are still open in the Service Writing module. Therefore, any editing that needs to be done on the warranty repairs should be done in the Service Writing module rather than in Ford Warranty Entry. This ensures the warranty information updates to the Accounting module properly. You should wait until the warranty claims are fully edited or closed in the Service Writing module before editing them in Ford Warranty Entry.

Chapter 3 Processing Claims Using Ford OWS

Once you generate and print the warranty repair orders, you review the information and send the claims to Ford. The Repair Orders menu has a **Ford Warranty** button Ford dealers use to access the Ford One Warranty Solution. You use this to view, edit, and download the Ford warranty repair orders. This chapter covers each menu option.

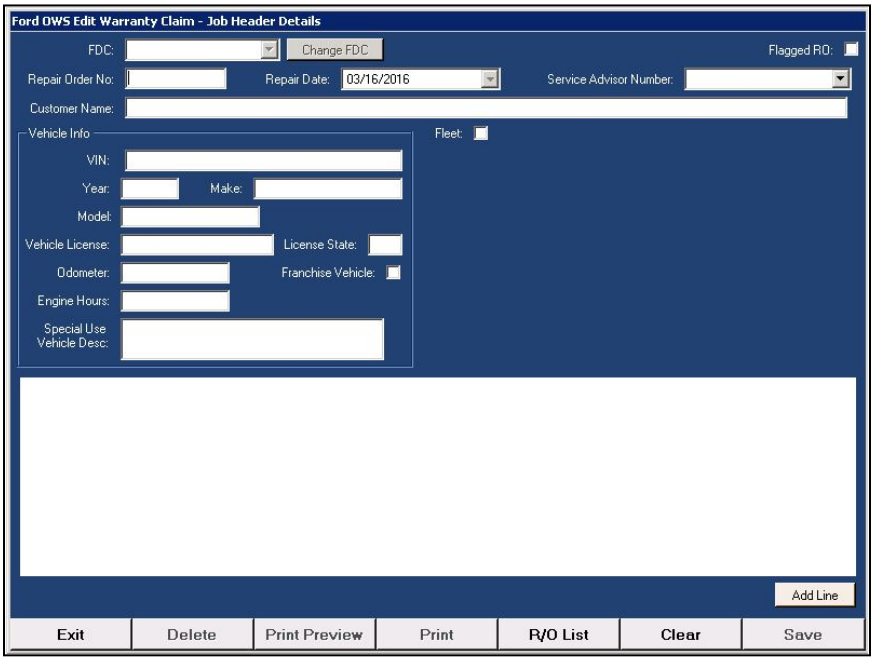


Edit Claim

Use the **Edit Claim** button to process and edit new claims. When you close and print the warranty repair order in the Service Writing module, as explained in the overview of the Review & Print screen on page 17, the warranty claims become available on this screen.

Editing a Claim

1. Click **Edit Claim**. The Job Header Details screen opens.



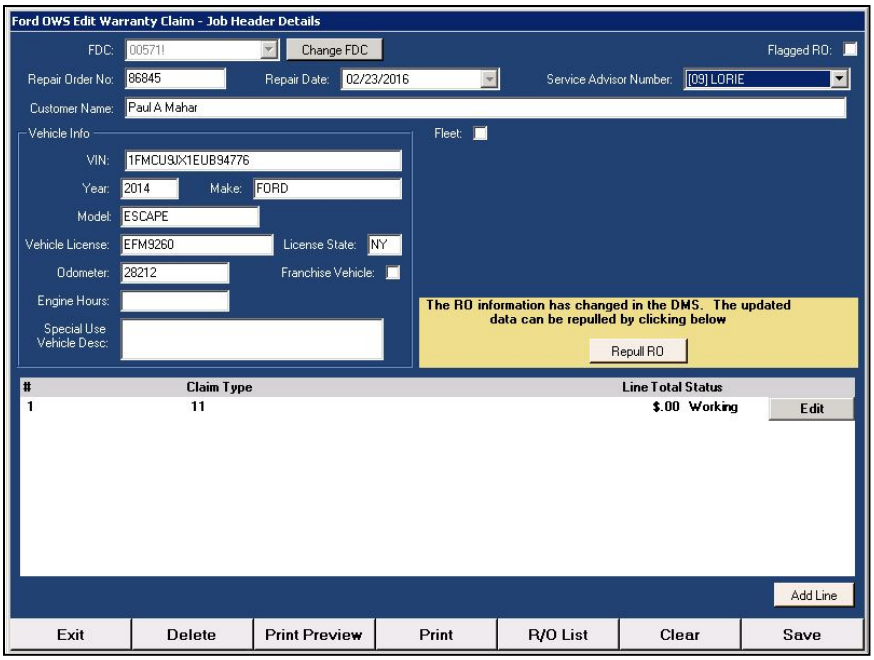
2. Click **R/O List** to view a list of available claims. Use the tabs at the top of the list screen to filter the list as needed. You can also sort the list by clicking any column header.

Tip: The R/O List display repair orders that have been transferred to the OWS from the DMS based on the number of days you selected in the setup. After that, the repair orders will drop off the list, but you can still access the repair order by typing the RO in **the Repair Order No.** field. If the RO number has duplicated because the system has rolled over, you will see a prompt asking you to select which RO you want to view.

3. Double-click the repair order in the list you want to select.

   You can also type the repair order number for the R/O you want to edit in the **Repair Order Number** field. This field will accept any R/O number that exists in your FLEX DMS as long as it is less than one year old. You can then add the remaining information for the R/O (customer and vehicle information) and add repairs to the R/O as needed. This is especially useful for processing warranty repair orders that were improperly flagged in Service Writing and updated to Accounting. This allows you to recreate the warranty repair order in the Ford One Warranty Solution system and submit it to Ford for processing.

4. The repair order information fills in on the screen. The top part of the screen displays the customer's information, vehicle's information, and repair information. The bottom of the screen lists all of the repairs on the repair order and the totals for the repairs.



5. Use the **Change FDC** button to select another FDC code if needed.

6. Edit the information as needed.

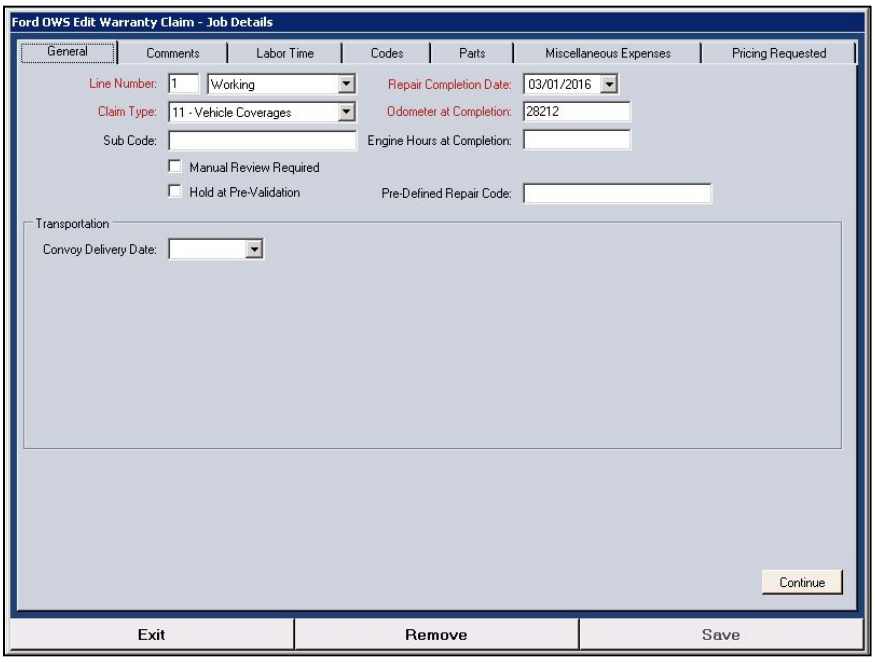
7. Click to select the **Flagged RO** box to flag the repair orders you want to watch. These repair orders display on the Flagged tab of the R/O List for tracking. The repair order will remain on this tab for 365 days or until you clear this box.

8. Use the **Print** or **Print Preview** buttons to print the job card as needed.

9. The window in the middle of the screen lists the repairs added to the R/O. Click the **Edit** button next to a repair to edit the repair information.

Tip: If the R/O has been edited in the DMS after it has been pulled to the Ford One Warranty Solution system, a **Repull RO** button appears. Click this button to pull the repair order from the DMS again. Pulling the R/O again will overwrite the R/O in the Ford One Warranty Solution system, so you will lose all edits you have made to the R/O in the Ford One Warranty Solution system.

10. The Job Details screen opens.



11. The Job Details screen contains seven tabs where you edit and add information for the repair:

    - **General:** Use this tab to add general information to the repair. The fields that display on the bottom part of the screen vary based on the claim type you select. Fields that displays in red are required fields. See page 24 for details about this tab.
    - **Comments:** Use this tab to add details about the customer complaint, the cause of the problem, and the steps taken to correct the problem. See page 25 for details about this tab.
    - **Labor Time:** Use this tab to review labor added to the repair and to add labor lines to the repair. See page 26 for details about this tab.
    - **Codes:** Use this tab to add codes to the repair. See page 27 for details about this tab.
    - **Parts:** Use this tab to review details for the parts required for the job. See page 29 for details about this tab.
    - **Miscellaneous Expenses:** Use this tab to review the sublet required for the job. See page 30 for details about this tab.
    - **Pricing Requested:** Use this tab to review the totals for the job. See page 31 for details about this tab.

12. Edit or add the appropriate information on each tab. The information displayed on some of the tabs varies based on the details selected for the repair.

13. When you are finished working on a tab, click **Continue** to advance to the next tab or **Back** (both in the lower right corner of the screen) to return to the previous tab. You can also click the tab name to select the tab.

14. Click **Save** when you are finished with the repair. The system returns you to the Job Header Details screen.

15. The status of the repair changes from “Working” to “Ready.” Repairs flagged “Ready” appear in a list on the Submit Claims screen. (See page 32 for more information.)

16. Select another repair to edit as needed.

17. When you are finished edit all the repairs, click **Save** on the bottom of the Job Header Details screen to save the repair order.

Tip: The system will identify any missing information required for the R/O when you attempt to save it. You will need to complete the missing information before the R/O can be submitted to Ford.

Removing a Repair

Removing a repair from the R/O removes it from the Ford One Warranty Solution system only. It does not remove the repair from the repair order in FLEX DMS.

1. Click **Edit Claim**.

2. Click **R/O List** to select the repair order from a list of available claims, ort type the R/O number in the **Repair Order Number** field. The repair order information fills in on the screen.

3. Click the **Edit** button next to a repair to edit the repair information. The Job Details screen appears.

4. Click **Remove**.

5. Click **OK** when prompted to verify you want to remove the repair.

Deleting an R/O

1. Removing a repair order removes it from the Ford One Warranty Solution system only. It does not remove the repair order in FLEX DMS.

2. Click **Edit Claim**.

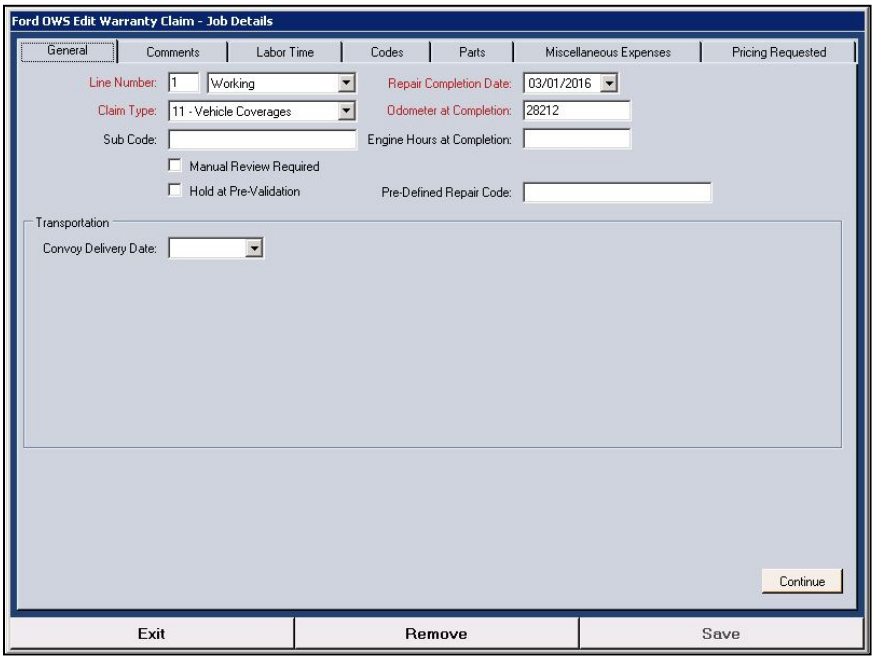
3. Select the repair order.

4. Click **Delete**.

5. Click **OK** when prompted to verify you want to delete the repair order.

Editing General Information

Use the **General** tab to add general information to the repair. The fields that display on the bottom part of the screen vary based on the claim type you select. Please refer to F1 Help for complete details about individual fields. Fields that displays in red are required fields.

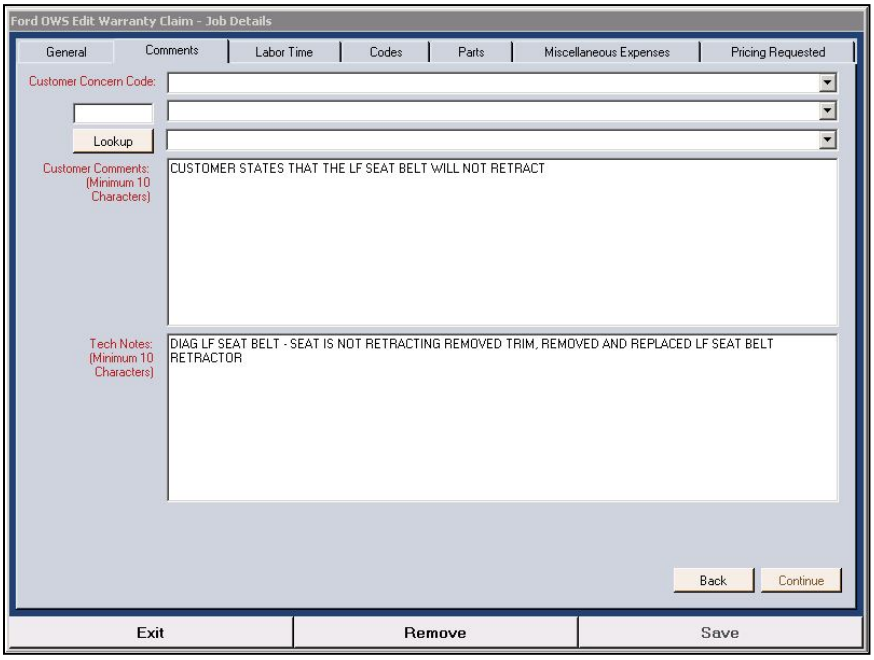


1. Any information entered for the repair fills in on the tab.
2. The line number is the repair number.
3. Verify the **Claim Type** field displays the correct transaction type. If necessary, select the claim type from the drop-down list.
4. The fields that display on the tab vary based on the selected claim type. Press F1 to view the help page for the tab to assist you as you work.
5. Click **Continue** to advance to the next tab.

Tip: The **Labor Time Guides** button is currently unavailable for use.

Editing Comments

Use the **Comments** tab on the Job Details screen to add details about the customer complaint, the cause of the problem, and the steps taken to correct the problem.



1. Any information entered for the repair will fill in on the tab. You may need to edit information to ensure it appears in the correct fields.

2. Use the **Customer Concern Code** section to assign the concern codes for the repair. Use the drop-down lists to select the codes. You can also type a code in the field and click **Lookup** to search for a code.

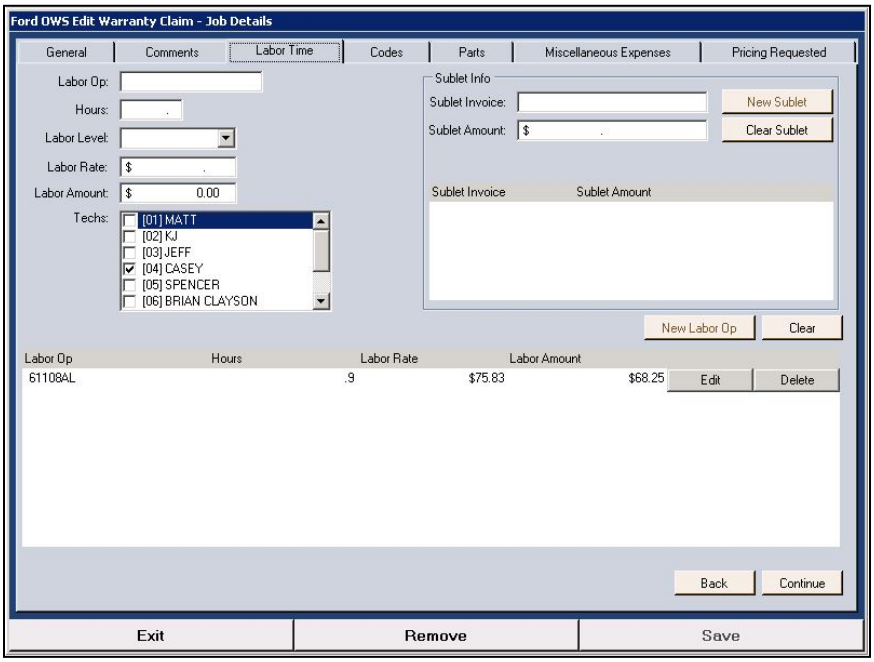
3. Use the **Customer Comments** section to enter the customer complaint. This section requires a minimum of 10 characters.

4. Use the **Tech Notes** section to enter the details about the steps the technician took to solve the problem. This section requires a minimum of 10 characters.

5. Click **Continue** to advance to the next tab.

Editing Labor

Use the **Labor Time** tab to review and add time to a repair. You can also add sublet to the repair on this tab. Note that sublet added in FLEX DMS can be viewed on the Miscellaneous Expenses tab and will not display on this tab.



Adding Labor

1. Enter the labor information.
2. Click **New Labor Op**.
3. The labor line is added to the labor list.

Editing Labor

1. Click **Edit** next to the line you want to edit.
2. Edit the labor information.
3. Click **Save Labor Op**.

Deleting Labor

1. Click **Delete** next to the line you want to remove.
2. The labor line is removed from the labor list.

Adding Sublet

1. Enter the sublet invoice number and invoice amount.
2. Click **New Sublet**.
3. The sublet is added to the sublet list.

Editing Sublet

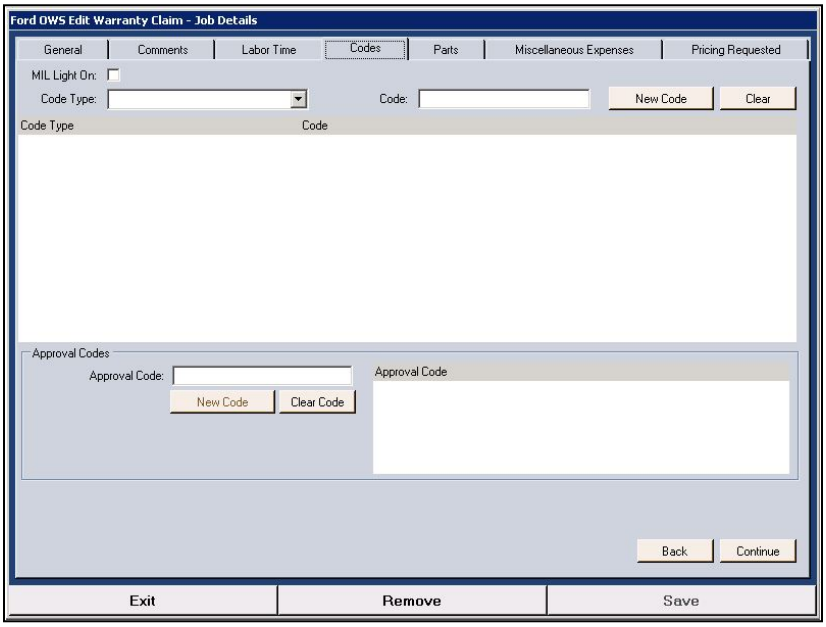
1. Click **Edit** next to the line you want to edit.
2. Edit the information.
3. Click **Save Sublet**.

Deleting Sublet

1. Click Delete next to the line you want to remove.
2. The labor line is removed from the sublet list.

Editing Codes

Use the **Codes** tab to add codes to the repair. Each Code Type requires a minimum number of characters to be submitted in the Code field. See F1 Help for a list of code types and the minimum characters required in the Code field for each type.



Adding Codes

1. If the MIL light was on, click to select the **MIL Light On** field.
2. Select the code type from the **Code Type** list.
3. Type the code in the **Code** field.
4. Click **New Code**. The code is added to the code list.

Editing Codes

1. Click **Edit** next to the line you want to edit.
2. Edit the information.
3. Click **Save Code**.

Deleting Codes

1. Click **Delete** next to the code you want to remove.
2. The code is removed from the list.

Adding Approval Codes

1. Type the code in the **Approval Code** field.
2. Click **New Code**. The code is added to the **Approval Code** list.

Editing Approval Codes

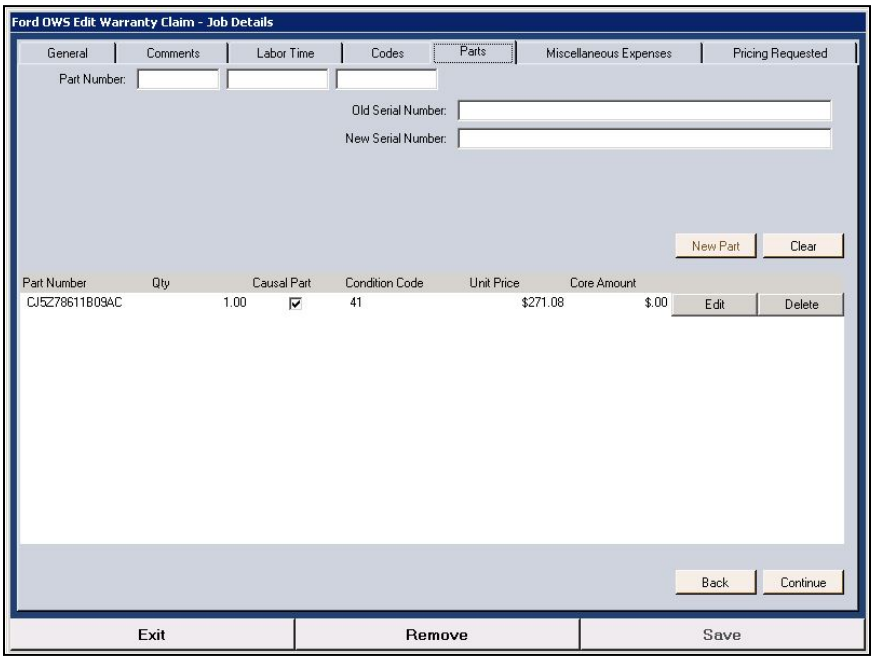
1. Click **Edit** next to the line you want to edit.
2. Edit the information.
3. Click **Save Code**.

Deleting Approval Codes

1. Click **Delete** next to the line you want to remove.
2. The code is removed from the **Approval Code** list.

Editing Parts

Use the **Parts** tab to edit part information or add parts to a repair. Note that condition codes must be applied to a single part. The system will automatically add the condition code to the part flagged as the causal part in FLEX DMS. If there are no parts, no condition codes pull. If you are not replacing a part, add the part number in the **Non-Replaced Causal Part** field on the Ford Warranty screen. This ensures the condition code will pull to Ford OWS with the repair.



Editing a Part

1. Any parts added to the repair display in the list on the screen.
2. Click **Edit** next to the part line. The information fills in the fields at the top of the screen.
3. Edit the information as needed.
4. Click **Save Part**.
5. Click **Continue** to advance to the next tab.

Adding a Part

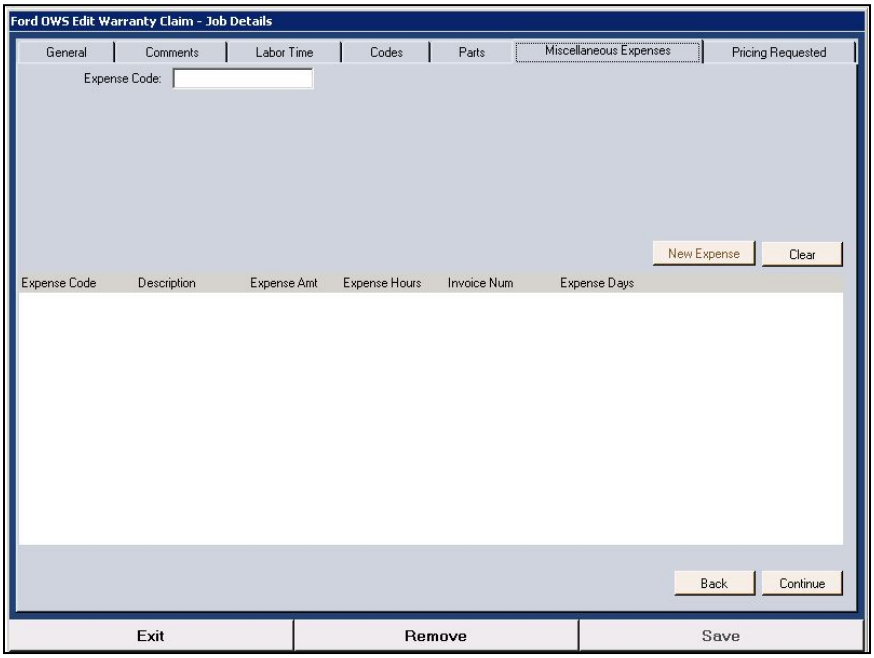
1. Type the part information. Once you enter a part base, the information for the part will pull from the DMS.
2. Click the **Causal Part** box if this is the failed part. Only one part can be flagged as the causal part. If there is no causal part, use the box on the bottom of the tab to type a description.
3. Click **New Part**. The part is added to the part list.

Removing a Part

1. Click **Delete** next to the part line.
2. The part is removed from the part list.

Editing Miscellaneous Expenses

Use the Miscellaneous Expenses tab to edit sublet information or add sublets to a repair. The sublet you add here does not need to exist in the Autosoft's FLEX DMS Service Writing setup. This prevents you from having to create a code in the DMS for a sublet you use periodically.



Editing a Sublet

1. The sublet added to the repair display in a list on the screen. Click **Edit** next to the sublet in the list. The information for the sublet fills in on the tab.
2. Edit the information as needed.
3. Click **Save Expense**.
4. Click **Continue** to advance to the next tab.

Adding a Sublet

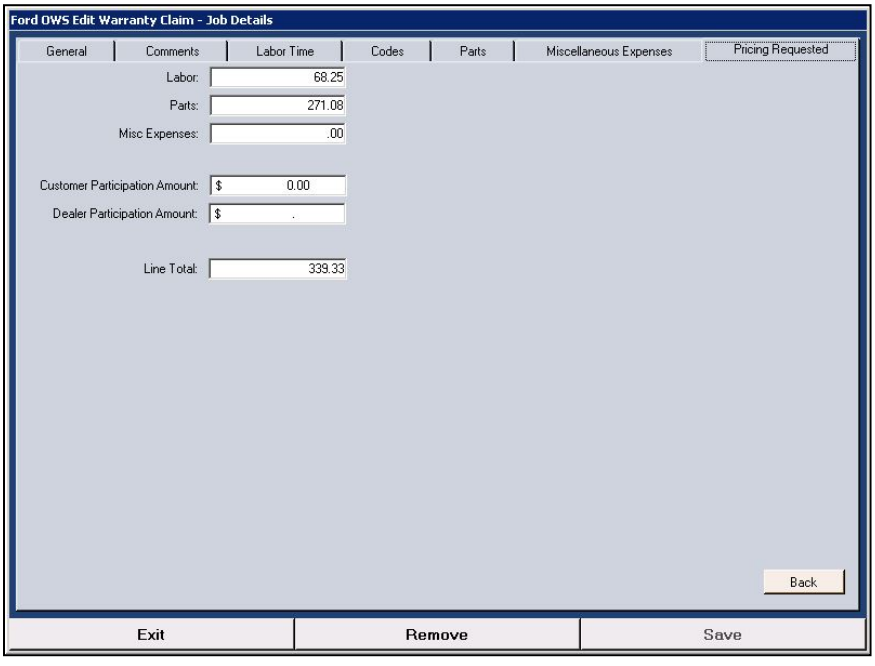
1. Type the sublet code in the **Expense Code** field.
2. Type a description, the expense amount, the expense hours, the invoice number, and the expense days.
3. Click **New Expense**.
4. The sublet appears in the list on the screen.

Removing a Sublet

1. Click **Delete** next to the sublet you want to remove.
2. The sublet is removed from the list.

Editing Pricing

Use the Pricing Requested tab to view the totals for the repair. The totals are based on the information entered on the previous tabs, so the only fields you can edit on this tab is the **Customer Participation Amount** and the **Dealer Participation Amount**. You will need to edit information for the other fields on the previous tabs to adjust the totals.



Verifying Totals

1. Verify the totals for the repair.

2. If a deductible was applied in the DMS, a yellow box appears indicating the amount applied. Ensure the deductible has been properly applied to the job. The box will remain until you save the repair order and the total deductible amount applied to the repairs is greater than or equal to the deductible amount applied in the DMS.

3. If the totals are not correct, you will need to edit information on the other tabs to adjust the totals. Click **Back** to return to the previous tabs.

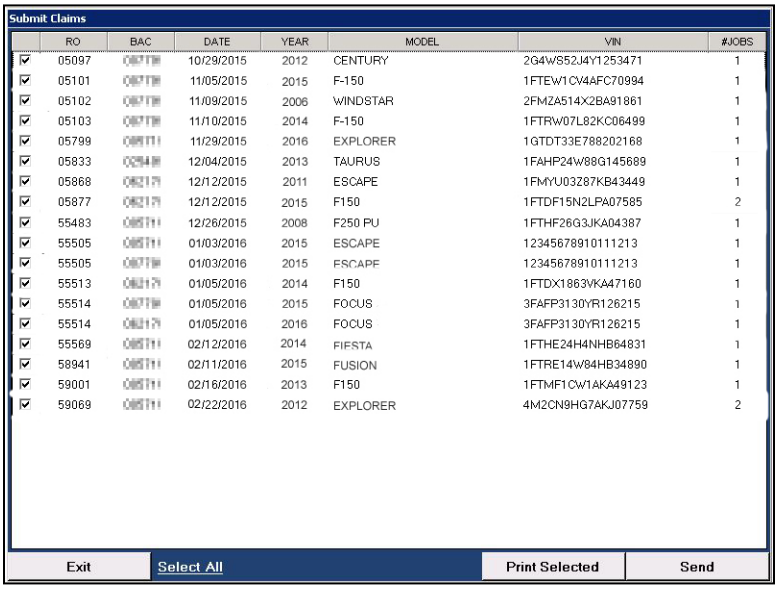
4. When all of the information is complete, click **Save** to save the repair.

Submitting Claims

You use the **Submit Claims** option to submit the warranty files to Ford. Before you download the claims, you can select which claims you want to include in the download.

Important: The cutoff for overnight processing by Ford is 4:00 PM EST.

1. Click **Submit Claims**. The Submit Claims screen appears.

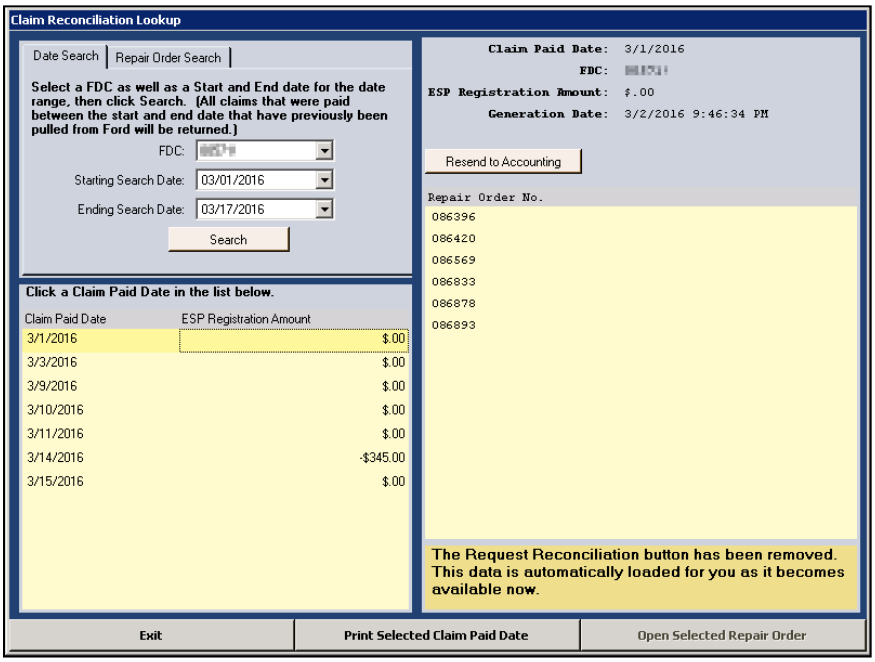


2. The screen lists the warranty files ready to submit to Ford. By default, all repair orders are selected. Click to clear the box in front of the R/O number to exclude the R/O from the submission. Click a cleared box to reselect a claim.

3. When you are finished selecting the repairs, click **Send**.

Viewing Claim Status

The **Claim Status** option allows you to view the claim status. The claims will pull from Ford when they are available. You have the option of viewing claims based on the date or by repair order number.



Searching By Date

This searches claim data that has already been pulled from Ford.

1. Click **Claim Status**.
2. Verify you are on the **Date Search** tab.
3. Use the **FDC** drop-down list to select the code.
4. Use the date fields to select the starting and ending date for the search.
5. Click **Search**. The claims display in the window on the bottom of the screen.
6. Click a claim to view the detail. The information displays on the right side of the screen.
7. Click a repair order in the list, and click **Open Selected Repair Order**.
8. All the repairs on the repair order display in a list on the left side of the screen. Click a line (repair) in the list to view the detail. The detail for the line displays in the window on the right side of the screen.
9. Click **Print** (or **Print Preview**) to print the information.
10. Click **Exit** to close the screen and to return to the search list.

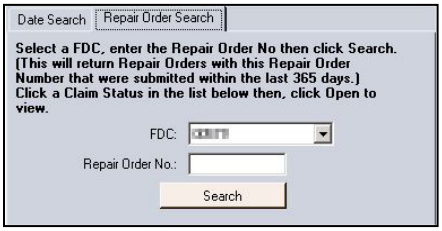
Searching By R/O Number

This searches claim data that has already been pulled from Ford.

1. Click **Claim Status**.
2. Click the **Repair Order Search** tab.
3. Use the **FDC** drop-down list to select the code.
4. Type the repair order number.
5. Click **Search**.
6. The information for the repair order displays in the window on the bottom of the screen.
7. Click **Open Selected Repair Order** to open a summary of the repair order.
8. All the repairs on the repair order display in a list on the left side of the screen. Click a line (repair) in the list to view the detail. The detail for the line displays in the window on the right side of the screen. The detail for the line displays in the window on the right side of the screen.
9. Click **Print** (or **Print Preview**) to print the information.
10. Click **Exit** to close the screen and to return to the search list.

Printing the Claim Status Summary

Once you have the list of repair orders displayed on the screen, you can click **Print Status Summary** to print the information. You have the option of printing the information sorted by repair order number or claim status code.



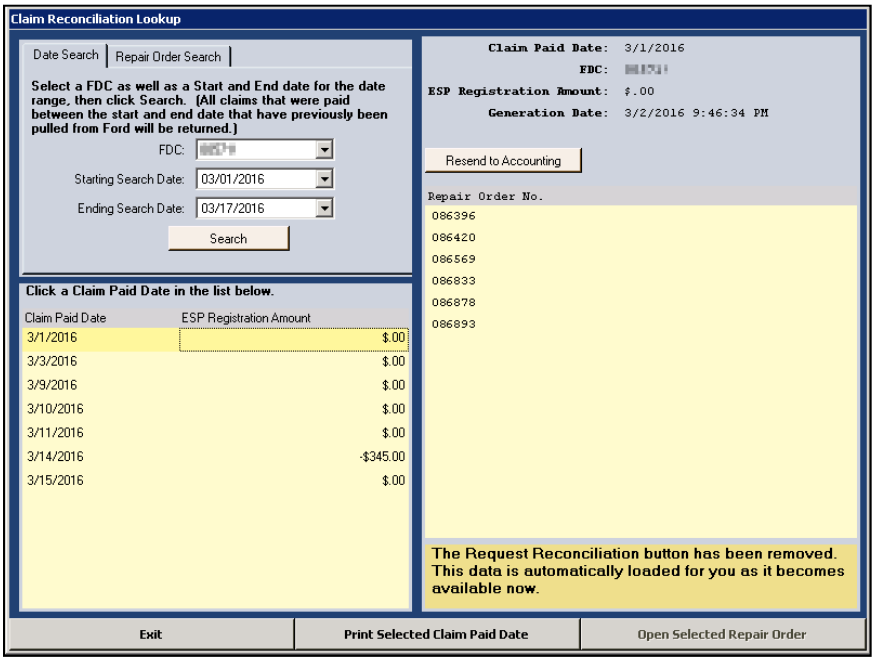
Understanding Status Codes

Below is a list of status codes you will see and their meaning. Only the status code of 01 for a paid claim will never change. All other codes are for display purposes only.

- **01:** Paid
- **02:** Dealer Action Required
- **03:** Manual Review
- **04:** Held
- **05:** Scheduled for Delete
- **06:** Cancelled
- **07:** Saved Incomplete
- **09:** Paid Adjusted
- **10:** Chargeback
- **11:** Denied

Reconciling Claims

The **Claim Reconciliation** option on the Ford OWS main menu allows you to view information for paid claims. Autosoft automatically pulls the reconciliations from Ford. They are available for viewing on the Claims Reconciliation Lookup screen. Claims will not appear here until they have been flagged as paid by Ford. You have the option of viewing claims based on the date or by repair order number.

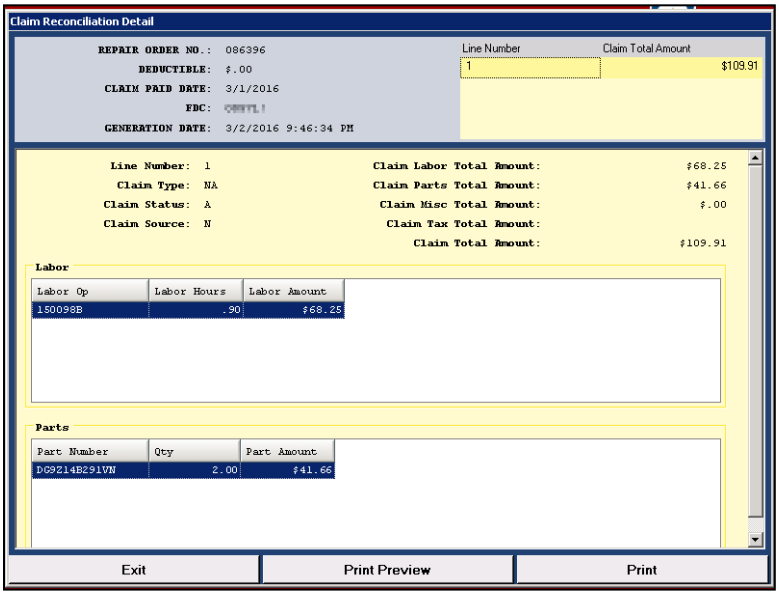


Searching By Date

This searches reconciliation data that has been pulled from Ford.

1. Click **Claim Reconciliation**.
2. Verify you are on the **Date Search** tab.
3. Use the **FDC** drop-down list to select the code.
4. Use the date fields to select the starting and ending date for the search.
5. Click **Search**. The claims display in the window on the bottom of the screen.
6. Click a claim to view the detail. The information displays on the right side of the screen.
7. At this point, you can click **Print Selected Claim Paid Date** to print the information.
8. Click a repair order in the list, and click **Open Selected Repair Order**.

9. All the repairs on the repair order display in a list on the top of the screen. Click a line (repair) in the list to view the detail. The detail for the line displays on the bottom of the screen.



10. Click **Print** (or **Print Preview**) to print the information.

11. Click **Exit** to close the screen and to return to the search list.

Searching By R/O Number

This searches reconciliation data that has already been pulled from Ford.

1. Click **Claim Reconciliation**.

2. Click the **Repair Order Search** tab.

3. Use the **FDC** drop-down list to select the code.

4. Type the repair order number.

5. Click **Search**. The claims display in the window on the bottom of the screen.

6. At this point, you can click **Print Selected Claim Paid Date** to print the information.

7. Click a claim to view the detail. The information displays on the right side of the screen.

8. Click a repair order in the list, and click **Open Selected Repair Order**.

9. All the repairs on the repair orders display in a list on the top of the screen. Click a line (repair) in the list to view the detail. The detail for the line displays in the window on the bottom of the screen.

10. Click **Print** (or **Print Preview**) to print the information.

11. Click **Exit** to close the screen and to return to the search list.

Resending Files to Accounting

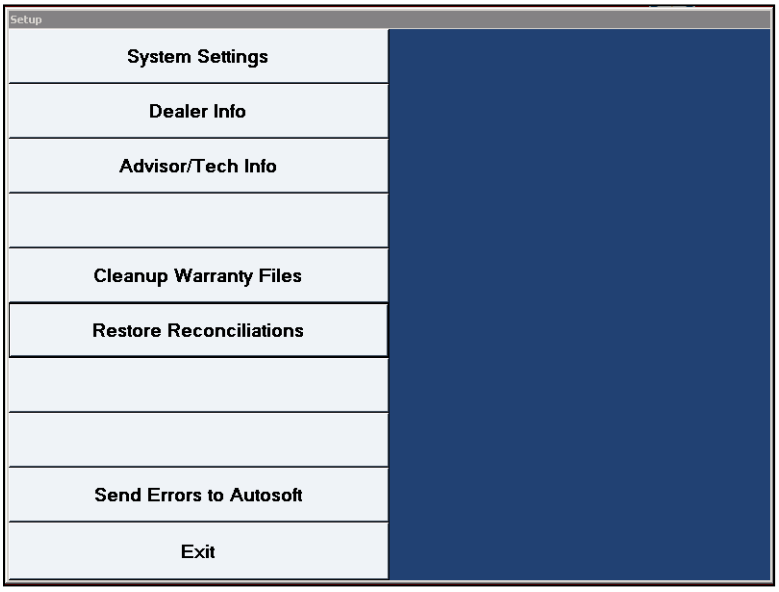
The **Resend to Accounting** button on the Claim Reconciliation Lookup screen allows you to push a reconciliation claim to Accounting so it is available in the Factory Receivables Statement screen for posting through the **Factory Payments** option. While reconciliation claims are automatically sent to Accounting normally, this button can be useful in the case of errors.

Cleaning Warranty Files

The Setup menu contains a **Cleanup Warranty Files** utility you can use to remove repair order data that cannot be transferred to the Ford OWS system. You should not use this utility without assistance from an Autosoft Support Desk Representative.

Restoring Reconciliations

The Setup menu contains a **Restore Reconciliations** utility that allows you to search for and restore claims that were paid and have already been pulled from Ford. You should not use this utility without assistance from an Autosoft Customer Support Center representative.



Conclusion

This completes the information needed to generate Ford warranty claims in the Autosoft's FLEX DMS system. You should keep the manual on hand until you are familiar with the processes. If you have questions when you are working through the warranty module, call Autosoft at (800) 473-4630, and a Support Desk Representative will assist you.