



**NEW FLYER OF AMERICA**

# Customer Warranty Portal User Manual

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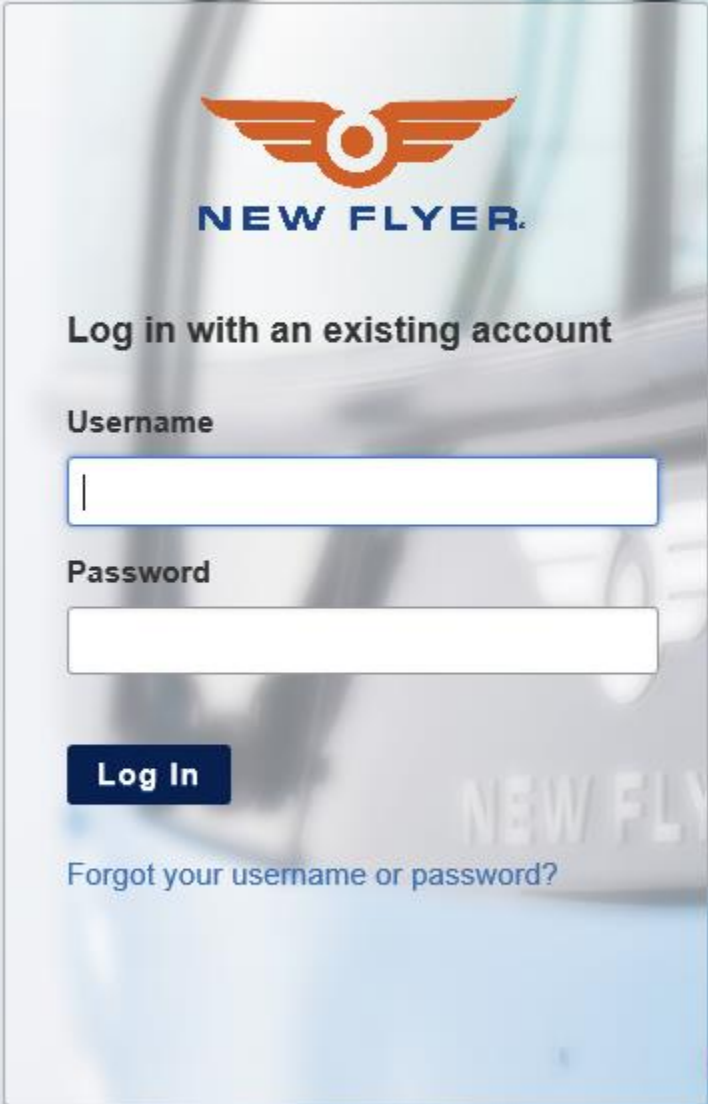
# 1. Warranty Claim Instructions

1. The purpose of these instructions is to ensure that warranty claims are properly recorded and processed in a timely manner through the New Flyer Industries Oracle Service Cloud System.
2. Claims are to be submitted within thirty (30) calendar days from the date of failure. Claims submitted later than thirty (30) days will be subject to rejection.
3. Ensure only one claim is submitted per failure. If multiple failures occur on the same bus, multiple claims will need to be submitted.
4. Please provide as much detail as possible when completing your failure information.  
\*\* Statements such as "PART BROKE or PART NOT WORKING" will not be accepted.
5. The lowest replacement component must be replaced when applicable. Claims may be reduced or rejected if the assembly item is replaced when a smaller component is the actual causal part required for the repair.
6. All defective parts claimed under warranty must be returned to New Flyer for warranty evaluation within forty-five (45) calendar days from the date of failure. If authorized by New Flyer Service personnel, it may be determined that the part(s) may be disposed of at the properties location. This must be indicated on the warranty claim.
7. Returned defective parts must be identified with the New Flyer parts return tag (see page 14). The tag must be completed and affixed to the defective part.
8. Defective parts are to be shipped to New Flyer Industries, unless otherwise instructed by RPSM and/or Warranty Recovery Administrator. See page 15 for United States packing slip, page 16 for Canadian packing slip, and page 17 for shipping instructions and carriers.
9. The Warranty period is based on the acceptance date of each coach, and on negotiated contract details. The Warranty Claims Administrator and Warranty Recovery Administrator will verify the applicable warranty period prior to approving the claim.

## 2. Login Instructions

Enter your user name and password. The user name is normally the first letter of your first name, followed by your last name (note this is case sensitive).

If you are having trouble logging in please contact the New Flyer Warranty department.



The image shows a login form overlay on a background of a New Flyer vehicle. The form is white with a thin border and contains the following elements:

- NEW FLYER.** logo at the top center.
- Log in with an existing account** heading.
- Username** label above a text input field.
- Password** label above a text input field.
- Log In** button.
- [Forgot your username or password?](#) link.

### 3. Home Page

#### 3.1 Once you are logged on, the first page you will see is the “Home Page”. This page features:

- Listing of claims are in your work queue
- Listing of all claims
- Search for a specific claim
- Create New Claim option
- Create Goodwill Claim option
- Customer Reports
- Documentation Library
- Change Password

<b>Create Claims</b>	<b>Work Queue</b>	Claims
Xcelsior/LF Claim		
Goodwill Claim		
MiDi/NABI Claim		
<b>Reports</b>		
Customer Report		
<b>Support</b>		
Documentation Library		
Change Password		
Logout		

Claim Type	Claim #	Reference #	Status	Date Created	Action
Warranty Coa...	180605-000093		All Parts Ship...	06/05/2018	<a href="#">Edit</a>
Warranty Coa...	180605-000084		All Parts Ship...	06/05/2018	<a href="#">Edit</a>
Warranty Coa...	180605-000083		All Parts Ship...	06/05/2018	<a href="#">Edit</a>
Standard War...	180605-000020	180605-20	Draft	06/05/2018	<a href="#">Resume</a>
	180603-000006		Draft	06/03/2018	<a href="#">Resume</a>
Standard War...	180531-000031	180531-31	Draft	05/31/2018	<a href="#">Resume</a>
Standard War...	180530-000078	123456_AB...	Draft	05/30/2018	<a href="#">Resume</a>

#### 3.2 Work Queue

- It's very important to monitor your work queue on a regular basis. Any claims within your work queue are waiting for you to action and or submit. Statuses include **DRAFT**, **PARTIAL PARTS SHIPPED**, **ALL PARTS SHIPPED** or **CORRECTIONS NEEDED**.
- Columns can be sorted by clicking on any one of the titles (Claim Type, Claim #, etc.)
- **CORRECTIONS NEEDED** – these claims have been sent back by a New Flyer Administrator for further clarification/information or corrections. Open the claim and view the New Flyer Comments section for the reason for return. Scroll through the claim and make required adjustments then resubmit, the claim will no longer be in your queue.
- **DRAFT** – these are claims that you have created but not yet submitted. These should be actioned asap so claims do not age past the submission timeline.
- **ALL/PARTIAL PARTS SHIPPED** – these are claims sent back to the submitter once the requested parts have been shipped out under a Warranty Coach Down claim. The claims will now need to be completed with the applicable repair information, labor and any other charges. Once completed please resubmit, the claim will no longer be in your queue.

### 3.3 Customer Reports

- Select Customer Reports from the left hand menu and enter the applicable information based on the claims criteria you are looking to see. The report will automatically show up on the home page and can be exported into an Excel spreadsheet by clicking the [Download](#) button.

#### Claims Report

[Download](#)

Claim #	Customer Reference #	Claim Status	Estimated ETA	Fleet Number	Date Created	Total Amount Rqd	Total Amount Adj	Total Paid Amount
180402...		Approved		1019	04/02/2...	2650	2500	0
180320...	Retrofit...	Approved		1016	03/20/2...	150	0	0
180402...		Pending		1017	04/02/2...	150	0	0

## 4. Warranty Claim Entry

### How to Create a Warranty Claim

On the Home Page, under Create Claims on the left navigation panel, select from Xcelsior/LF, Goodwill or MiDi/NABI. The system will automatically assign the appropriate claim type (Standard, Warranty Coach Down or Retrofit) based on the criteria you enter during the claim interview process.

#### 4.1 Standard Warranty Claim

##### Page 1 Bus

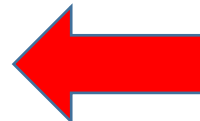
- You will be prompted to enter your bus information starting with either your VIN or bus/fleet number. Enter the VIN or bus/fleet number and then click the search icon. Note only the last 5 digits of the VIN are required.

**Do you have the bus/fleet number for the affected bus?**

\*

Yes  No

**What is the bus/fleet number?** \*



- Enter all required information on this page (odometer reading at the time of failure, customer reference number if desired). Then select the Next button to continue.

## Page 2 Bus Detail

- This is a reference screen to confirm the proper bus information has been recorded. Click Next to proceed or Back to make any required changes.

## Page 3 Failure

- You will be required to answer questions regarding the failure. If this claim is for work completed against an ITS select Yes and see section 4.2.
- The Causal Part # refers to the New Flyer part number that caused the failure.
- If the repair has already been completed select Yes and your claim will be processed for reimbursement only. If you select No your claim will continue as a Warranty Coach Down claim type see section 4.3.
- Complete the remainder of the Failure page and select Next to continue. Note: if the causal part does not have any coverage you will be notified at this point and the claim will be rejected.

## Page 4 Failure Continued

- Select the Repair Completed date from the calendar provided. Complete the Failure and Corrective Action fields and click Next to continue.

## Page 5 Parts

- Select Yes to add parts for reimbursement to this claim. Select the Add Part button as many times as required for the Quantity and Unit Price of parts you are claiming. Click Next to continue.

## Page 6 Labor

- Select Yes, then Add Labor to add any applicable labor. Click Next to continue.

## Page 7 Other Charges

- Select Yes to add Other Charges if required. Select the Add Other Charges button as many times as required for multiple charges.
- Use the Browse button to attach any applicable documentation here as well, such as invoices, pictures, brake check sheets etc. Click Next to continue.

Bus ✓	<h3>Other Charges</h3> <p>Do you wish to add other charges to this claim? *</p> <p><input type="radio"/> Yes <input checked="" type="radio"/> No</p> <p>Please attach documents pertaining to the claim, if desired</p> <p><input type="text"/> <input type="button" value="Browse..."/></p> <p><small>In completing this claim, the customer is responsible to claim any applicable Federal/State/Provincial taxes.</small></p> <hr/> <p><input type="button" value="Back"/> <input type="button" value="Next"/></p>
Bus Detail ✓	
Failure ✓	
Failure Continued ✓	
Parts ✓	
Labor ✓	
<b>Other Charges ✓</b>	
Summary	

### Page 8 Summary

- Review the Warranty Claim Summary and select Submit or Back to make any changes.
- Note: any additional comments can be added to the bottom of the Claim Summary Sheet.

## 4.2 ITS/Retrofit Claim

### Page 3 Failure

- Select the applicable ITS Number from the drop-down menu. Click Next to continue.

**Failure**

Is this claim for work completed against an ITS? \*

Yes  No

What is the applicable ITS number? \*

ITS - x ▾

Back Next

### Page 4 Failure Continued

- Select the Repair Completed Date from the calendar provided.
- The cause and corrective action information will be auto-populated for you from the ITS. Click Next to continue.

### Page 5 Parts

- When asked if you would like to add parts, No, will typically be selected since the required parts have already been provided. Click Next to continue

### Page 6 Labor

- The Labor hours will already be populated for you based off the ITS. Enter the applicable Labor rate. You have the option to change the Labor Time Hours if required but it will need further approval. Click Next to continue

### Page 7 Other Charges

- Select Yes to add Other Charges if required. Select the Add Other Charges button as many times as required for multiple charges.
- Please attach any applicable documentation at this point.

### Page 8 Summary

- Review the Warranty Claim Summary and select Submit or Back to make any changes.



## 4.3 Warranty Coach Down Claim

### Page 3 Failure

- Complete the remainder of the Failure page.
- Use the Browse button to attach any applicable documentation, such as invoices, pictures, brake check sheets etc. Click Next to continue.

### Page 4 Parts

- Select Yes to add parts required to this claim. Select the Add Part button as many times as required for the quantity of parts you are requesting to be sent out under warranty for this claim.
- Select the Ship to Location from the drop-down menu and add any additional Shipping Instructions. Select Next to continue.

### Page 5 Summary

- Review the Warranty Claim Summary and select Submit or Back to make any changes.
- Note: once all requested parts have been shipped out this claim will be sent back to your work queue as ALL PARTS SHIPPED status so it can be completed and resubmitted.

## 5. Goodwill Claim Entry

### How to Create a Goodwill Warranty Claim

On the Home Page, click on Create Goodwill Claim from your left navigation panel. The system will automatically assign the appropriate claim type (Standard or Warranty Coach Down) based on the criteria you enter during the claim interview process.

#### 5.1 Goodwill Standard Warranty Claim

##### Page 1 Bus

- You will be prompted to enter your bus information starting with either your VIN or bus/fleet number. Enter the VIN or bus/fleet number and then click the search icon. Note only the last 5 digits of the VIN are required.
- Enter all required information on this page. Select the Next button to continue.

##### Page 2 Bus Detail

- This is a reference screen to confirm the proper bus information has been recorded. Click Next to proceed or Back to make any required changes.

##### Page 3 Failure

- You will be required to answer questions regarding the failure.
- If the repair has already been completed select Yes and your claim will be processed for reimbursement only. If you select No your claim will continue as a Goodwill Warranty Coach Down claim type, see section 5.2.
- Complete the remainder of the Failure page and select Next to continue.

##### Page 4 Failure Continued

- Complete the Failure and Corrective Action fields and click Next to continue.

### Page 5 Parts

- Select Yes to add parts for reimbursement to this claim. Click Next to continue.

### Page 6 Labor

- Select Yes to add any applicable labor. Click Next to continue.

### Page 7 Other Charges

- Select Yes to add Other Charges if required.
- Use the Browse button to attach any applicable documentation here as well, such as invoices, pictures, brake check sheets etc. Click Next to continue.

### Page 8 Summary

- Review the Warranty Claim Summary and select Submit or Back to make any changes.
- Once submitted the claim will go directly to your RPSM for initial approval.

## 5.2 Goodwill Warranty Coach Down Claim

### Page 3 Failure

- Complete the remainder of the Failure page.

### Page 4 Parts

- Select Yes to add parts required to this claim.
- Select the Ship to Location from the drop-down menu and add any additional Shipping Instructions. Select Next to continue.

### Page 5 Summary

- Review the Warranty Claim Summary and select Submit or Back to make any changes.
- Once submitted the claim will go directly to your RPSM for initial approval.

## 6. Claim Statuses

- Any claim that has been started but not submitted will be in DRAFT status.
- Once submitted from DRAFT status a claim can flow to the following statuses.
  - **PENDING** – submitted to New Flyer Claims Admin and will be reviewed for processing or send back for Corrections Needed as required.
  - **PARTS REQUIRED** – submitted to the New Flyer Parts Admin for review and processing of the warranty coach down parts order.
  - **CORRECTIONS NEEDED** – claim has been sent back to the submitter for further clarification or adjustments.
  - **ALL/PARTIAL PARTS ORDERED** – the warranty coach down claim has been processed by the New Flyer Parts Admin and the requested parts have been ordered.

- **ALL PARTS SHIPPED** – the requested parts under a warranty coach down claim have all been shipped out.
- **PARTIAL PARTS SHIPPED** – the requested parts under a warranty coach down claim have partially been shipped out.
- **PARTS RETURN** – claim is on hold waiting for the defective parts to be returned from the submitter.
- **NON-RECOVERABLE CONFIRMATION** – internal status meaning the claim is being reviewed for supplier verification.
- **HOLD SUPPLIER APPROVAL** – due to the high dollar value the claim will not progress until the supplier evaluation has been received by New Flyer.
- **ON HOLD** – claim is on hold with New Flyer due to an internal investigation or further clarification.
- **PENDING RPSM APPROVAL** – claim is with your Regional Product Support Manager pending their review for approval.
- **APPROVED** – claim has been approved for payment.
- **REJECTED** – claim has been rejected.



## 7. Claim Search Methods

### 7.1 Single Claim Search






- Use the search field on the Claims tab.
- Enter the claim number.
- You can also change the selection on the Status and Show Record Menu and then hit the search icon.

Work Queue **Claims**

Search your Claim History 

**Status**   **Show Records**  

**My Claims**  
[Download All](#) Results 1 - 30 of 41

Claim Type 	Claim # 	Reference # 	Status 	Date Created 	Action 
	180410-000075		Draft	04/10/2018	<a href="#">Resume</a>

## 7.2 Multiple Claim Search

- On the Claims tab, leave the claim field blank and use the Status and Show Records Menu so you can change the view of records you see.
- Click the search Icon once you've made your selection.

Work Queue **Claims**

Q

**Status**  
 ▼

**Show Records**  
 ▼

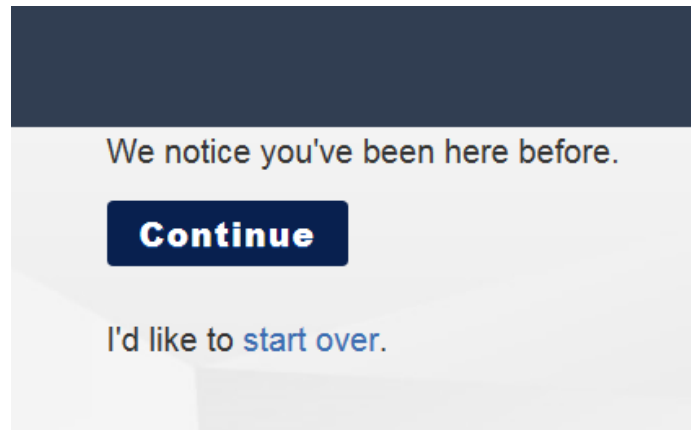
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**My Claims**  
[Download All](#) Results 1 - 30 of 41

Claim Type ▼	Claim # ▼	Reference # ▼	Status ▼	Date Created ▼	Action ▼
	180410-000075		Draft	04/10/2018	<a href="#">Resume</a>

The claims view can be sorted by clicking on any of the column headers and it will arrange the claims accordingly.

- 8 Select the [Download All](#) option to export this list into an Excel spreadsheet.
- 9 Depending on the claim status you have the option to either [View](#) or [Resume](#) the claim.
- 10 By clicking View it will open up the Warranty Claim Summary for your reference.
- 11 By clicking [Resume](#) you will have the option to complete the claim by either Continuing from where you left off or Start Over.



## 8. Email Notifications

### **Corrections Needed**


- Email notifications will be received by the submitter once a claim has been moved back to their Corrections Needed queue.

### **Cancelled Claims**

- Email notifications will be received when an entered Draft claim will be cancelled due to it being aged.

## 9. Parts Return Instructions

### NFI Parts Return Tag



**NEW FLYER**

**NEW FLYER INDUSTRIES**

CUSTOMER NAME: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

DATE: \_\_\_\_\_

PART # \_\_\_\_\_

DESCRIPTION: \_\_\_\_\_

\_\_\_\_\_

SR # \_\_\_\_\_ BUS # \_\_\_\_\_

VIN # \_\_\_\_\_

CUSTOMER REF. # \_\_\_\_\_

NF CLAIM # \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

NOTES: \_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

**WARRANTY PARTS BEING RETURNED FOR CREDIT EVALUATION**



**PACKING SLIP- USA**

Date of Shipment: \_\_\_\_/\_\_\_\_/\_\_\_\_

Ship to:

Warranty Returns Dock #14  
 New Flyer Industries  
 7001 Universal Coach Drive  
 Louisville KY 40258

**Attention: Warranty Department**

From:

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Part Number	Claim Number	Part Description	Part Quantity	Bus Number

Fax this packing slip to fax # **204-224-0248 Attn: Warranty Recovery Administrator** or email to **sheldon\_chudyk@newflyer.com** Also place a copy in the shipment box / crate.

**\*\*Please clearly mark WARRANTY on the outside of the package\*\***

**WARRANTY PARTS BEING RETURNED FOR CREDIT EVALUATION**



**PACKING SLIP- CND**

Date of Shipment: \_\_\_\_/\_\_\_\_/\_\_\_\_

Ship to:

From:

New Flyer Industries Limited  
 630 Kernaghan Avenue  
 Doors 7 & 8  
 Winnipeg, Manitoba  
 Canada R2C 5G1

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**Attention: Warranty Department**

Part Number	Claim Number	Part Description	Part Quantity	Bus Number

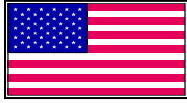
Fax this packing slip to fax # **204-224-0248 Attn: Warranty Recovery Administrator** or email to **sheldon\_chudyk@newflyer.com** Also place a copy in the shipment box / crate.

**\*\*Please clearly mark WARRANTY on the outside of the package\*\***



## Defective Parts Shipping Instructions

The following Carriers are to be notified for pickup of defective Warranty Parts being returned



### United States Customer

Shipments over 150 pounds	Shipments under 150 pounds
<p><b>ESTES Express</b> Phone: 1-877-268-4555</p> <p>Ship collect to New Flyer account 5022165</p>	<p><b>Federal Express Ground</b> Phone 1-800-463-3339</p> <p><b>NOTE: Please specify to the FedEx operator that you are REQUESTING A CALL TAG going back to New Flyer. The Operator may need to be prompted to check the exception on the account if they state that New Flyer must make this call.</b></p> <p><b>New Flyer Account # 326474207</b></p>



### Canadian Customers

Shipments over 150 pounds	Shipments under 150 pounds
<p><b>ATS</b> Phone: 1-888-404-4292</p> <p>Or</p> <p>514-733-8539 (Quebec) Reference New Flyer &amp; TForce account 173727</p>	<p><b>Federal Express Ground</b> Phone 1-800-463-3339</p> <p><b>NOTE: Please specify to the FedEx operator that you are REQUESTING A CALL TAG going back to New Flyer. The Operator may need to be prompted to check the exception on the account if they state that New Flyer must make this call.</b></p> <p><b>New Flyer Account # 326474207</b></p>