

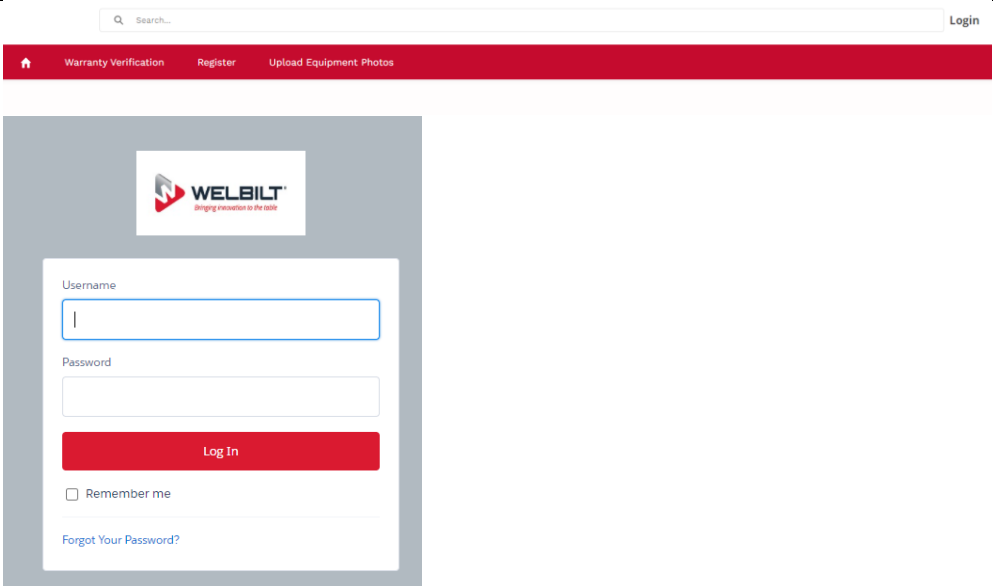
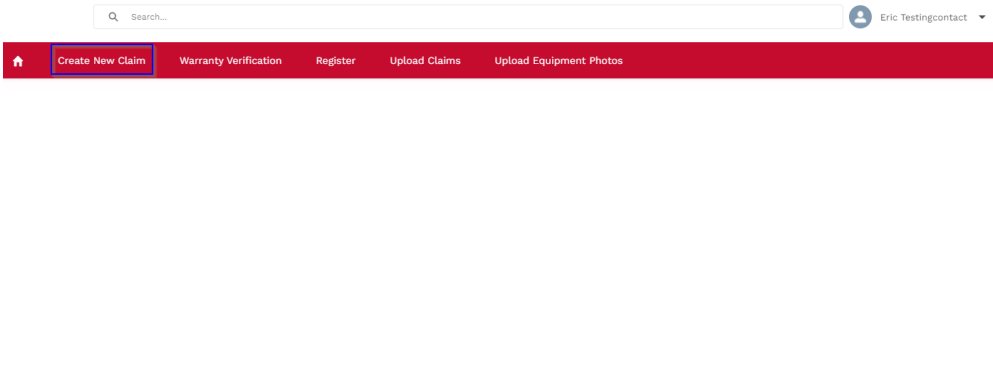
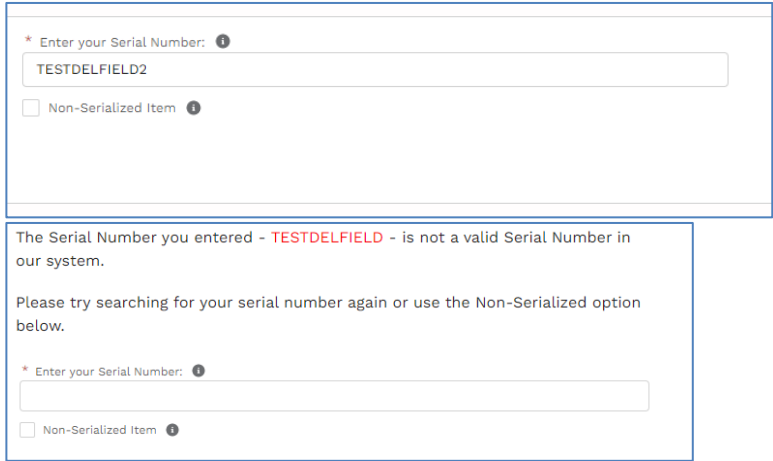
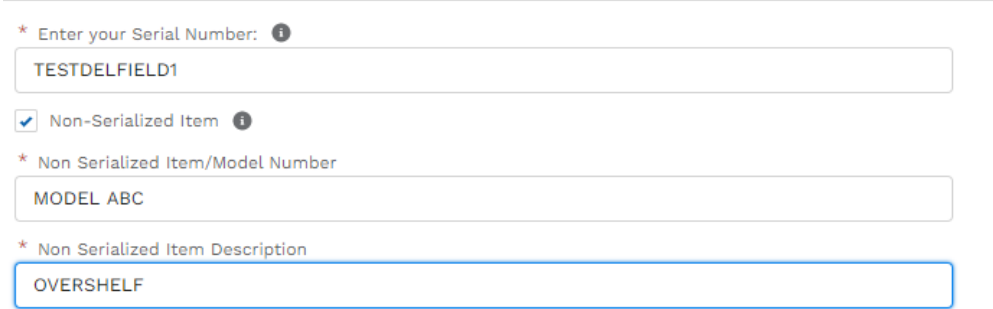
Instructions:
New KitchenCare Claim Processing System
Date:

11/18/2020

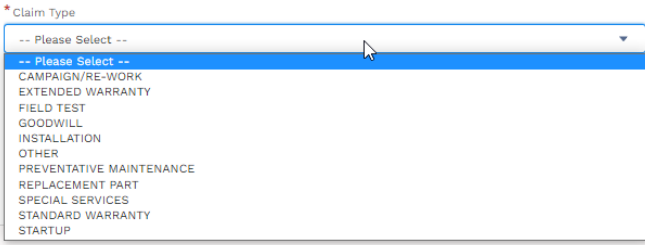
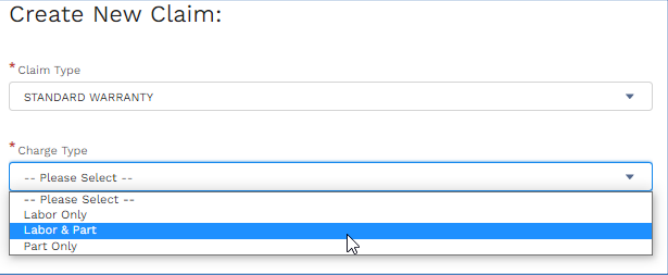
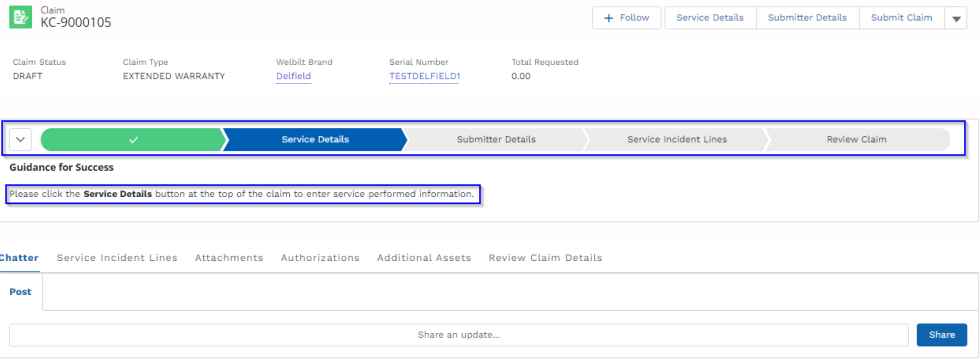
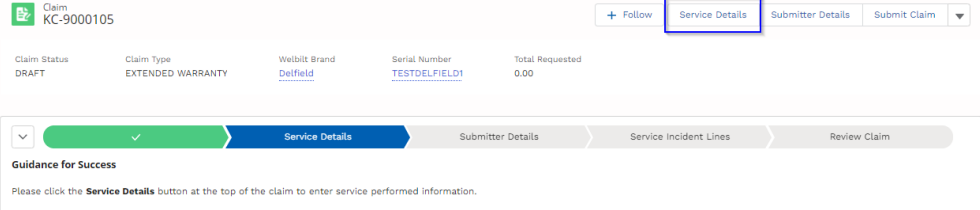
Claim Creation & Submittal

Notes

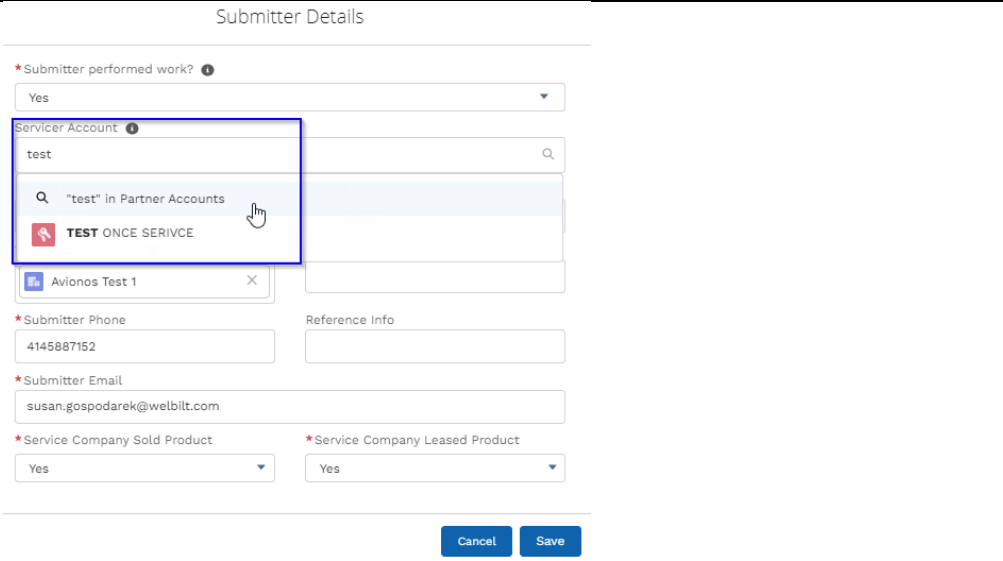
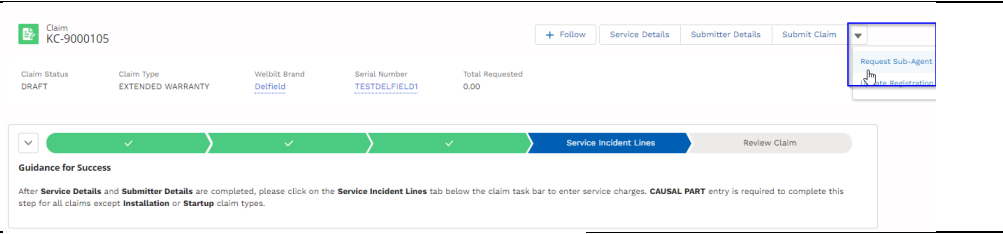
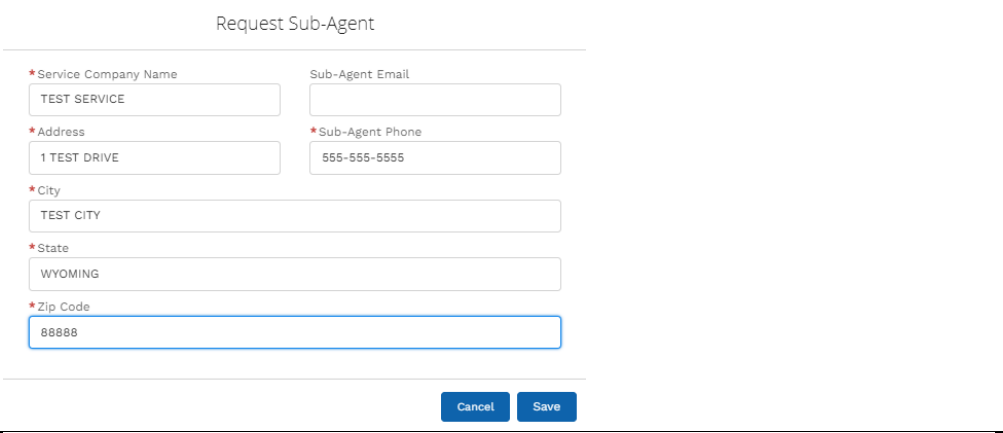
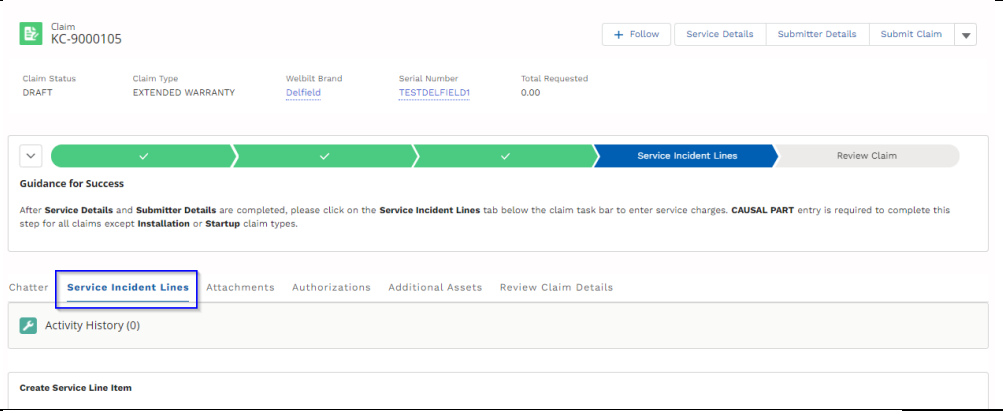
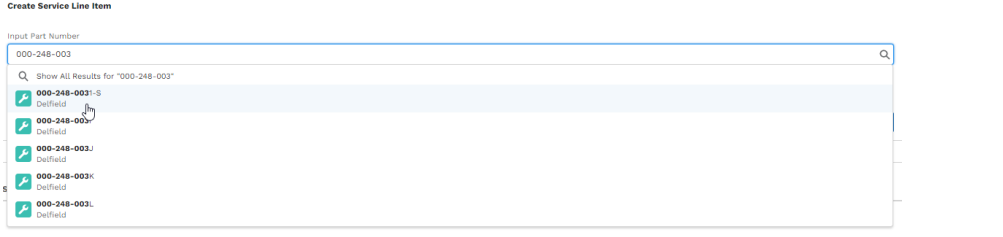
1. The KitchenCare CPS is compatible with Google Chrome and Microsoft Edge
2. Any field with an asterisk (*) is required to be populated
3. Claim Type Definitions
 - **Campaign/Re-work:** Rework, Retrofit or Upgrades claims.
 - **Extended Warranty:** Warranty claim for a product that has warranty coverage beyond the standard warranty period.
 - **Field Test:** Field test worked performed as directed by the manufacturing facility.
 - **Installation:** Equipment installation claims.
 - **Preventive Maintenance:** Preventive maintenance & performance check work.
 - **Replacement Part:** Replacement parts warranty only.
 - **Special Services:** Site surveys.
 - **Standard Warranty:** Labor and/or parts for a product in warranty.
 - **Start Up:** Equipment startup.
 - **Goodwill:** Concessions
 - **Other:** Concessions and claims that do not fit any other category.
2. Claim Status Definitions:
 - **Draft** – Claim has been created and saved.
 - **Submitted**– Claim has been submitted to processing center.
 - **Received** – Claim has been received by claim processing center.
 - **Approved** – Claim has been reviewed and approved for payment.
 - **Approved-Adjusted** – Claim has been reviewed, approved for payment with adjustments made to the claim.
 - **Approved By Hub** – (not currently used in the United States)
 - **Approved Adjusted by Hub** – (not currently used in the United States)
 - **Awaiting Parts Return** - Claim payment is being held until required parts are returned to the manufacturing facility.
 - **Awaiting Invoice** – Invoice is needed from claim submitter.
 - **Invoice Attached** – Status after claim in “Awaiting Invoice” is resubmitted by claim submitter.
 - **Pending for Information – External** - Claim is being held pending further information from claim submitter (claim is opened for submitter to make changes and resubmit).
 - **Pending for Information – Internal** – Claim is being held pending further information from technical support or other internal source.
 - **Resubmitted** – Status after claim in “Pending for Information – External” is resubmitted to manufacturer.
 - **Processed for Payment** – Claim has been entered into Service Maintenance by claim processor.
 - **Denied** – Claim has been reviewed and denied for payment.
 - **Denied By Manufacturer** – (not currently used in the United States)
4. Status change email notifications: Each time the status is changed on a claim, a notification email with the current status is sent to the creator of the claim, except for the following statuses: Pending for Information – Internal, Denied by Manufacturer, and Processed for Payment

Instructions		
1)	<p>To log into the KitchenCare Claims Processing System (CPS) click on the link below: https://welbilt.force.com/CPS/s/</p> <p>Click on “Login” on the top right corner and enter your username and password to access the CPS</p>	
2)	<p>To create a claim, click on the Create New Claim in the header</p>	
3)	<ul style="list-style-type: none"> On the next page, enter the serial number and click Next on the right of the screen If the serial is not valid, you will receive an error 	
4)	<p>Non-Serialized:</p> <ul style="list-style-type: none"> If your claim is for non-serialized equipment, check the box next to “Non-Serialized Item” You will need to enter a serial number it is associated to along with non-serialized Item/Model Number and Description 	

5)	<ul style="list-style-type: none"> The next page will display asset information Enter the Install Date and Purchase Date (if known) If the unit has been registered, the date fields may already be populated Click Next at the right of the screen 	<p>Registration Date: November 18, 2020</p> <p>Serial Number: TESTDELFIELD1 Model/Item Number: MODEL123 Brand: DELFIELD Item Description: 2 DOOR REFRIGERATOR Original Install Date: October 27, 2020 Original Purchase Date: October 27, 2020</p> <p>Purchase Date Oct 27, 2020</p> <p>* Install Date Oct 27, 2020</p> <p>Asset Location Details ⓘ </p>
6)	<ul style="list-style-type: none"> Populate the Owner Information fields If the Equipment Location is the same as the Owner Location, check the box on the screen and the address information will be on the next page for the Equipment Location. <ul style="list-style-type: none"> The box must be checked prior to going to the next page. Click Next on the bottom right of the page 	<p>Owner Information</p> <p>* Business/Individual Business</p> <p>* Company MOM AND POP'S ICE CREAM SHOP</p> <p>First Name </p> <p>* Address Line 1 123 NORTH POLE LANE</p> <p>Last Name </p> <p>Address Line 2 </p> <p>Owner Email email@email.com</p> <p>Address Line 3 </p> <p>* Owner Phone 555-555-5555</p> <p>Suite/Apartment/Room # </p> <p><input type="checkbox"/> Check this box if the Equipment Location is the same as the Owner Location</p> <p>* City/Town TWO RIVERS</p> <p>* Country United States</p> <p>* State/Province Wisconsin</p> <p>* Postal/Zip Code 54241</p> <p>Previous Next</p>
7)	<ul style="list-style-type: none"> Populate Equipment Location information if the check box was not checked on the previous page that the information is the same as Owner Information Click Next on the bottom right of the page 	<p>Equipment Location</p> <p>* Location Name ⓘ MOM AND POP'S ICE CREAM SHOP</p> <p>* Chain Name ⓘ NONE</p> <p>* Location Type Commercial</p> <p>* Address Line 1 123 NORTH POLE LANE</p> <p>Contact Name </p> <p>Address Line 2 </p> <p>* Contact Phone 555-555-5555</p> <p>Address Line 3 </p> <p>Contact Email email@email.com</p> <p>Suite/Apartment/Room # </p> <p>* City/Town TWO RIVERS</p> <p>* Country United States</p> <p>* State/Province Wisconsin</p> <p>* Postal/Zip Code 54241</p> <p>Previous Next</p>
8)	<ul style="list-style-type: none"> Attach a proof of purchase or proof of installation if available by uploading from your local network or drag and dropping Click Next at the right of the page 	<p>Attach Files (Max file size 2 MB)</p> <p>Notice: Proof of Purchase is not required for warranty registration</p> <p>Even if it is not required including the Proof of Purchase/Installation may help expedite warranty claim processing in the case you have a warranty failure.</p> <p>Proof of Installation Upload Files Or drop files</p> <p>Proof of Purchase Upload Files Or drop files</p>

9)	Choose a Claim Type	<p>Create New Claim:</p> 
10)	<ul style="list-style-type: none"> Choose a Charge Type based on what you need to claim You will receive a message success message then, click Next on the right of the page <p>Note: Once the first charge is entered on the claim, the charge type listed on the Review Claim Details tab cannot be changed.</p>	<p>Create New Claim:</p>  <p>Create New Claim:</p> <p>Success! has been successfully created at 11/18/2020 2:05 PM.</p>
11)	<ul style="list-style-type: none"> There is a progress bar that shows what step is complete by changing to green with a check mark and what needs to be done next, which will display the step in blue. There is Guidance for Success text for each step that will display to help guide you on what needs to be completed <p>Note: All steps must be green, except for Review Claim in order to submit the claim.</p>	
12)	<p>Service Details</p> <p>Click on the Service Details button on the top right of the screen</p>	

13)	<ul style="list-style-type: none"> A pop-up window displays Enter information and click Save 	<div>Service Details</div> <div> <div>Authorization Number</div> <div>Authorized By</div> </div> <div> <div>Replacement Part Invoice #</div> <div>Replacement Part Invoice Date</div> </div> <div> <div>Replacement Part Install Date</div> </div> <div> <div>*Service Incident Summary ⓘ</div> <div>Unit was producing now ice. Needed to order part. Returned and replaced the part. Unit is operating.</div> </div> <div> <div>*Failure Date</div> <div>10/15/2020</div> <div>Failure Time</div> <div></div> </div> <div> <div>*Phone Call Made to Servicer</div> <div>10/15/2020</div> <div>Phone Call Made to Servicer Time</div> <div></div> </div> <div> <div>*Phone call Received/Return by Servicer</div> <div>10/15/2020</div> <div>Time Call Received / Returned</div> <div></div> </div> <div> <div>*Date Service Requested</div> <div>10/15/2020</div> <div>Time Service Requested</div> <div></div> </div> <div> <div>*Servicer Arrived on Site</div> <div>10/15/2020</div> <div>Time Servicer Arrived on Site</div> <div></div> </div> <div> <div>*Repair Completed</div> <div>10/15/2020</div> <div>Repair Complete Time</div> <div></div> </div> <div> <div>Currency</div> <div>USD - US Dollar</div> <div>*No. of Trips to Job Site</div> <div>1</div> </div> <div> <div>Service Requested By Name</div> <div></div> <div>Reason For Delay of Service</div> <div>--None--</div> </div> <div> <div>End User Acceptance Name</div> <div></div> <div>Reason For Delay Other</div> <div></div> </div> <div> <div>Technician Name</div> <div></div> <div>Technician ID</div> <div></div> </div> <div> <div>Left Hand Cycles</div> <div></div> <div>Right Hand Cycles</div> <div></div> </div> <div> <div>Customer Incident Number</div> <div></div> </div>
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16)	<p>Service Account field</p> <ul style="list-style-type: none"> If your company did not perform the work and you answer “No” for the Submitter Performed Work field, search for company that did the work in the Service Account field. Clicking on the looking glass on the top line will provide search results with address detail. If you do not find the company, you will need to send a “request” to have them added, but this will not prohibit you from submitting the claim. 	 <p>Submitter Details</p> <p>*Submitter performed work? </p> <p>Yes</p> <p>Service Account </p> <p>test</p> <p>Q "test" in Partner Accounts</p> <p>TEST ONCE SERVICE</p> <p>Avionos Test 1</p> <p>*Submitter Phone: 4145887152</p> <p>*Submitter Email: susan.gospodarek@welbilt.com</p> <p>*Service Company Sold Product: Yes</p> <p>*Service Company Leased Product: Yes</p> <p>Cancel Save</p>
17)	<p>To send a request to have a service account added, click on the down arrow next to Submit Claim at the top right of the page.</p>	 <p>Claim KC-9000105</p> <p>+ Follow Service Details Submitter Details Submit Claim</p> <p>Claim Status: DRAFT Claim Type: EXTENDED WARRANTY Welbilt Brand: DeField Serial Number: TESTDELFIELD1 Total Requested: 0.00</p> <p>Service Incident Lines Review Claim</p> <p>Guidance for Success</p> <p>After Service Details and Submitter Details are completed, please click on the Service Incident Lines tab below the claim task bar to enter service charges. CAUSAL PART entry is required to complete this step for all claims except Installation or Startup claim types.</p>
18)	<ul style="list-style-type: none"> A popup window displays Enter information and click Save 	 <p>Request Sub-Agent</p> <p>*Service Company Name: TEST SERVICE Sub-Agent Email:</p> <p>*Address: 1 TEST DRIVE *Sub-Agent Phone: 555-555-5555</p> <p>*City: TEST CITY</p> <p>*State: WYOMING</p> <p>*Zip Code: 88888</p> <p>Cancel Save</p>
19)	<p>Service Incident Lines</p> <p>Click on the Service Incident Lines tab below the progress bar to enter charges for the claim.</p> <p>Note: A causal part is required for all claims except Installation or Start Up</p>	 <p>Claim KC-9000105</p> <p>+ Follow Service Details Submitter Details Submit Claim</p> <p>Claim Status: DRAFT Claim Type: EXTENDED WARRANTY Welbilt Brand: DeField Serial Number: TESTDELFIELD1 Total Requested: 0.00</p> <p>Service Incident Lines Review Claim</p> <p>Guidance for Success</p> <p>After Service Details and Submitter Details are completed, please click on the Service Incident Lines tab below the claim task bar to enter service charges. CAUSAL PART entry is required to complete this step for all claims except Installation or Startup claim types.</p> <p>Chatter: Service Incident Lines Attachments Authorizations Additional Assets Review Claim Details</p> <p>Activity History (0)</p> <p>Create Service Line Item</p>
20)	<p>Entering Parts</p> <ul style="list-style-type: none"> To enter parts for reimbursement and/or as the causal part, enter the part number in the Input Part Number search box and select from the results listed or click 	 <p>Create Service Line Item</p> <p>Input Part Number: 000-248-003</p> <p>Q Show All Results for "000-248-003"</p> <p>000-248-003: S DeField</p> <p>000-248-003: DeField</p> <p>000-248-003: DeField</p> <p>000-248-003: DeField</p> <p>000-248-003: DeField</p> <p>000-248-003: DeField</p>

on the looking glass on the first row to see the part description.

• If the part is the causal part (the part that caused the failure), after selecting the part, check the **Causal Part?** box

• Click **Next** on the right of the page

Note on Causal Parts: Not all parts replaced need to be listed as the **Casual Part**. Only the main part that caused the failure would be checked as the **Causal Part**. Only list multiple parts as the **Causal Part** if there was more than one unrelated failure **OR** if you are claiming labor and the **Causal Part** replaced is greater than a quantity of one.

21)

• Populate the part service line fields

• When the part is checked as the causal part, the **Complaint**, **Failure Mode** and corrective action are required. Otherwise these fields will not be listed.

• Click **Next** at the right of the screen when complete

Note: If you chose **Labor Only** as the charge type at the start of the claim, the **Requested Rate** field will not display.

Input Part Number

000-248-003

Parts Master

25 Results • Sorted by **Relevance** ▾

ITEM NUMBER

000-248-0031-S

BRAND

Defield

ITEM DESCRIPTION

ASSY,COIL,R404A,P/T

000-248-003M

Defield

ASSY,COIL,R404A,REF,FAN RT,EC FANS

000-248-003L

Defield

ASSY,COIL,R404A,REF,FAN LT,EC FANS

Create Service Line Item

Input Part Number

000-248-0031-S

☒ Causal Part?

☐ Non-Part Related Service Line

Next

Part Service Line Details:

* Complaint

Not Cooling

* Failure Mode

LEAK FITTING ▾

* Corrective Action

REPLACED ▾

Part Inspection Number ⓘ

RM Tag#

* Qty

1

* Requested Rate

32.25

22)

• Enter the labor hours for the causal part entered

• If there is a contract in the system, the **Requested Rate** field will be populated as read only

• Click **Next** on the right of the screen.

Note: If the part number was not marked as a causal part **OR** if you chose **Part Only** as the charge type at the start of the claim, you will not be directed to this page to enter labor.

Labor for Part 000-248-0031-S:

* Expense Type

Hourly ▾

* UOM

HR ▾

* Qty

2

* Requested Rate

85

23)

The charges created will be listed at the bottom of the page

Service Incident Line Num...

Causal Part?

UOM

Requested Qty

Requested Rate/Charge

Total Requested

Parts - 000-248-0031-S

✓

EA

1.00

750.25

750.25 ▾

Labor - HOURLY

✓

HR

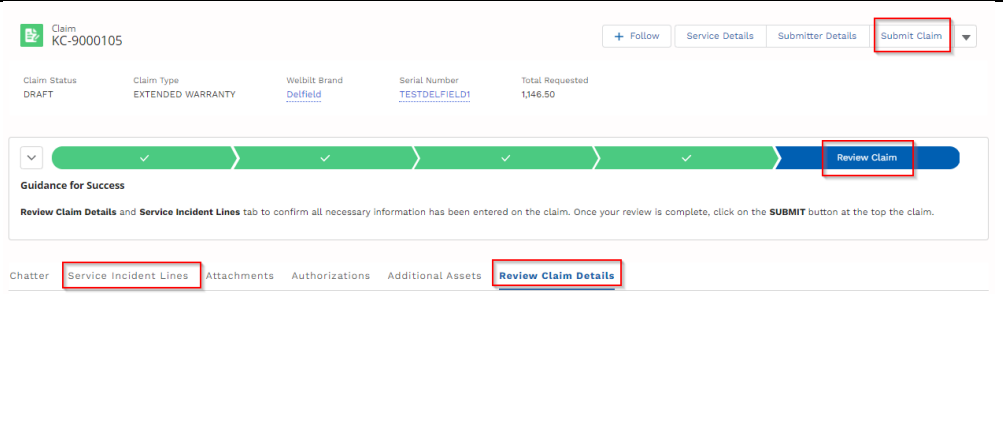
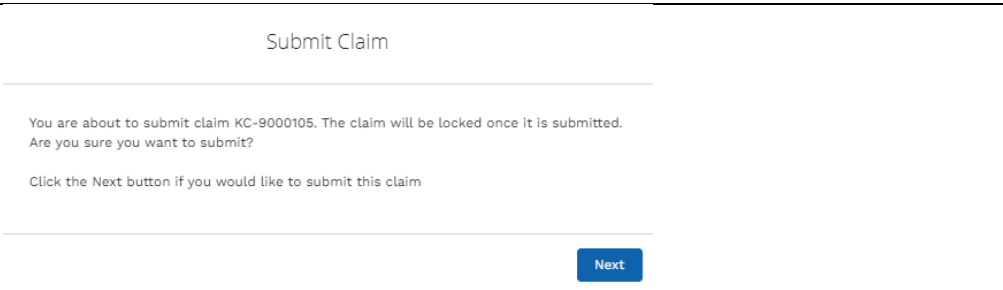
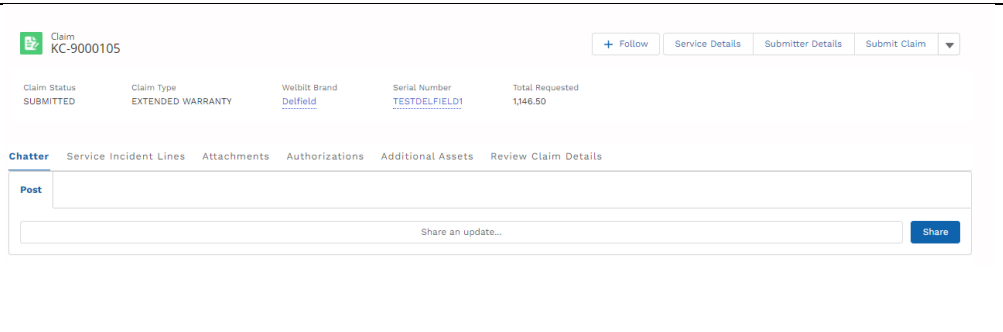

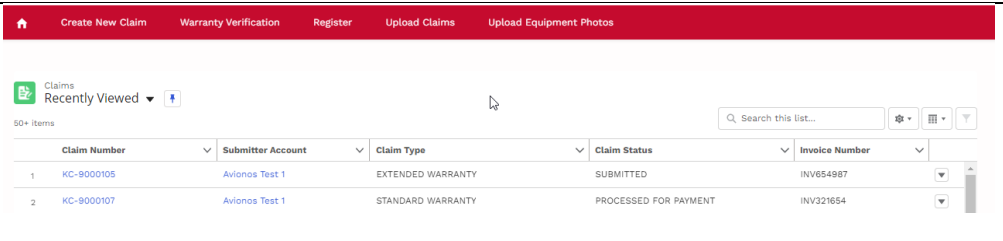

2.00

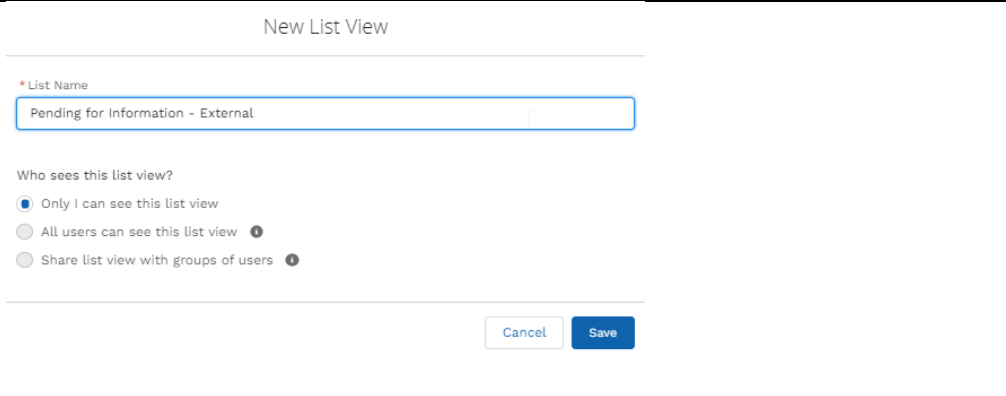
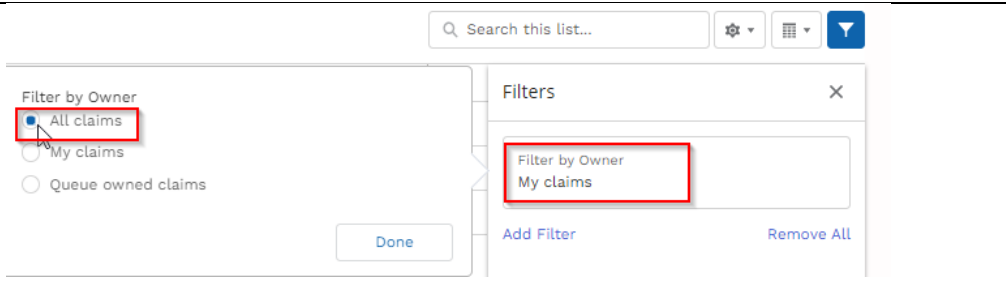
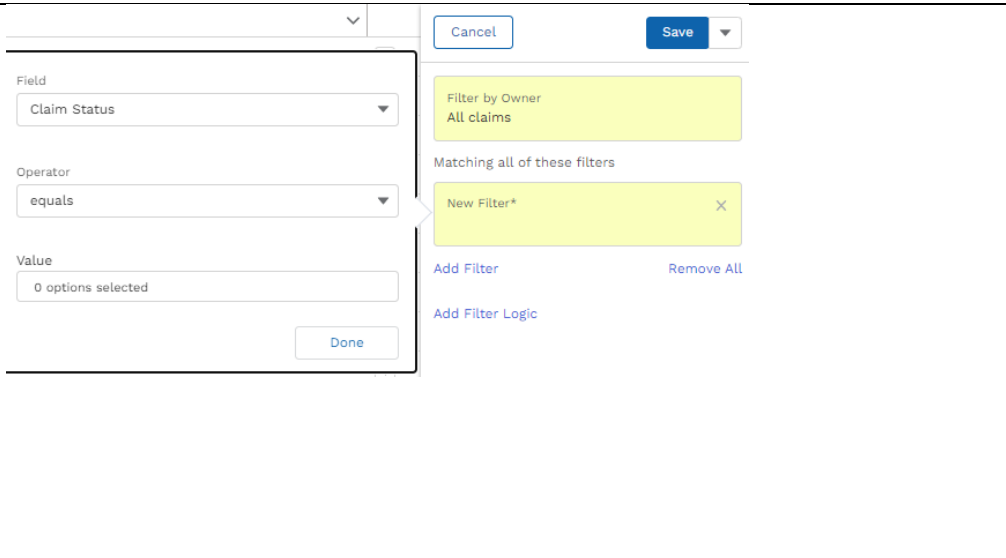
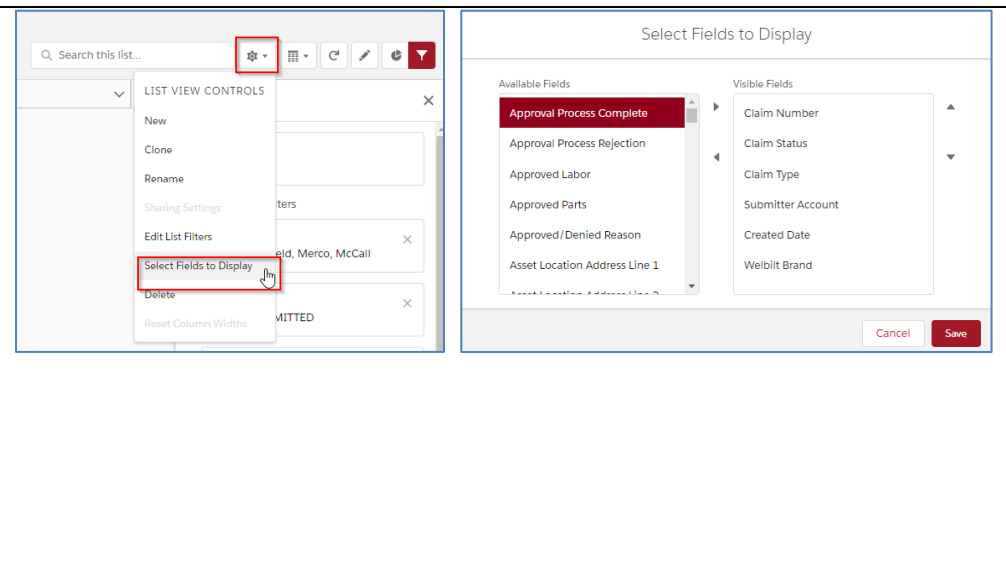
85.00

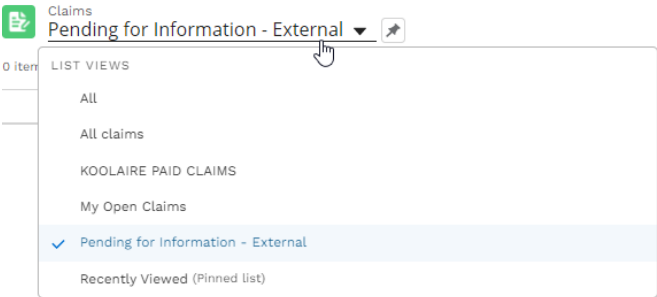
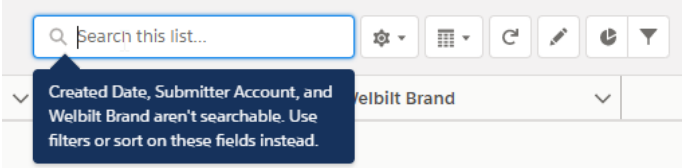
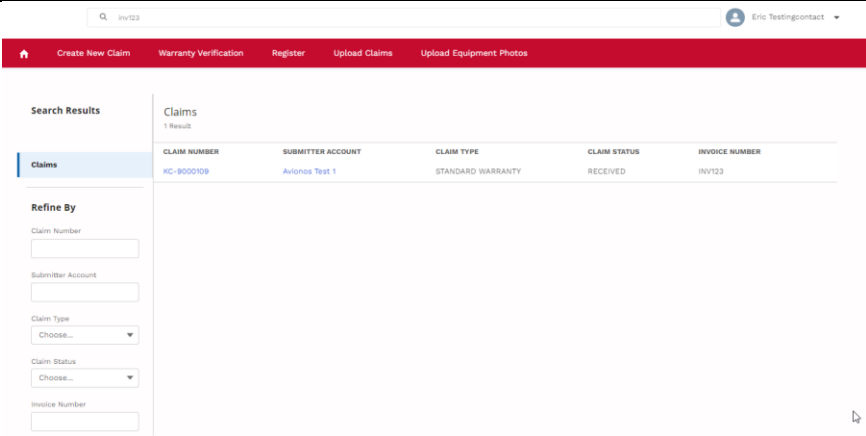
170.00 ▾

24)	<div>Entering Labor or Travel</div> <ul style="list-style-type: none">To enter labor that is not related to a causal part or to enter travel, check the box for Non-Part Related Service LineSelect the Service Line Type	<div>Create Service Line Item</div> <div>Input Part Number</div> <div>Search Parts Master...</div> <div><input type="checkbox"/> Causal Part?</div> <div><input checked="" type="checkbox"/> Non-Part Related Service Line</div> <div>Non-Part Related Service Line Details:</div> <div>* Service Line Type</div> <div>Labor</div> <div>-- none selected --</div> <div>Labor</div> <div>Travel</div> <div>Other</div>																								
25)	<ul style="list-style-type: none">Select the Expense TypeSelect the UOM (unit of measure)Click Next on the right of the screen	<div>* Service Line Type</div> <div>Travel</div> <div>* Expense Type</div> <div>-- none selected --</div> <div>-- none selected --</div> <div>MILEAGE</div> <div>TRAVEL, HOURLY</div> <div>TRAVEL, DOUBLE TIME</div> <div>TRAVEL, HOLIDAY</div> <div>TRAVEL, OVER TIME</div> <div>TRIP CHARGE</div> <div>TRUCK CHARGE</div> <div>* Service Line Type</div> <div>Travel</div> <div>* Expense Type</div> <div>TRAVEL, HOURLY</div> <div>* UOM</div> <div>-- none selected --</div> <div>-- none selected --</div> <div>MIN</div> <div>HR</div>																								
26)	<ul style="list-style-type: none">Enter a Description (if needed), Requested Quantity and Requested Rate<ul style="list-style-type: none">If there is a contract in the system, the Requested Rate field will be populated is read onlyClick Next on the right of the screen	<div>CPS - Service Line Items</div> <div>Description</div> <div></div> <div>* Requested Quantity</div> <div>2</div> <div>* Requested Rate</div> <div>85</div>																								
27)	The charge created will be listed on the bottom of the screen	<table><tr><th>Service Incident Line Num...</th><th>Causal Part?</th><th>UOM</th><th>Requested Qty</th><th>Requested Rate/Charge</th><th>Total Requested</th></tr><tr><td>Parts - 000-248-0031-S</td><td>✓</td><td>EA</td><td>1.00</td><td>750.25</td><td>750.25</td></tr><tr><td>Labor - HOURLY</td><td>✓</td><td>HR</td><td>2.00</td><td>85.00</td><td>170.00</td></tr><tr><td>Travel - TRAVEL, HOURLY</td><td></td><td>HR</td><td>2.00</td><td>85.00</td><td>170.00</td></tr></table>	Service Incident Line Num...	Causal Part?	UOM	Requested Qty	Requested Rate/Charge	Total Requested	Parts - 000-248-0031-S	✓	EA	1.00	750.25	750.25	Labor - HOURLY	✓	HR	2.00	85.00	170.00	Travel - TRAVEL, HOURLY		HR	2.00	85.00	170.00
Service Incident Line Num...	Causal Part?	UOM	Requested Qty	Requested Rate/Charge	Total Requested																					
Parts - 000-248-0031-S	✓	EA	1.00	750.25	750.25																					
Labor - HOURLY	✓	HR	2.00	85.00	170.00																					
Travel - TRAVEL, HOURLY		HR	2.00	85.00	170.00																					
28)	<div>Other Charges</div> <ul style="list-style-type: none">To enter an Other charge, check the box for Non-Part Related Service LineSelect the Service Line Type of Other	<div>Create Service Line Item</div> <div>Input Part Number</div> <div>Search Parts Master...</div> <div><input type="checkbox"/> Causal Part?</div> <div><input checked="" type="checkbox"/> Non-Part Related Service Line</div> <div>Non-Part Related Service Line Details:</div> <div>* Service Line Type</div> <div>-- none selected --</div> <div>-- none selected --</div> <div>Labor</div> <div>Travel</div> <div>Other</div>																								

29)	<ul style="list-style-type: none">Choose the Expense Type and then the UOMClick Next at the right of the screen	<div><div>Create Service Line Item</div><div>Input Part Number</div><div><div>Search Parts Master...</div><div><input type="checkbox"/> Causal Part?</div><div><input checked="" type="checkbox"/> Non-Part Related Service Line</div></div><div>Non-Part Related Service Line Details:</div><div><div>* Service Line Type</div><div>Other</div></div><div><div>* Expense Type</div><div>SALES TAX</div></div><div><div>-- none selected --</div><div>AUTHORIZED NON-OEM PART</div><div>DISPOSAL FEE</div><div>ELECTRICAL SUPPLIES</div><div>EQUIPMENT RENTAL</div><div>FREIGHT</div><div>HARDWARE</div><div>OPENING REFRIGERATION SYSTEM</div><div>PARTS HANDLING FEE</div><div>REFRIGERANT</div><div>SALES TAX</div><div>SUB AGENT HANDLING</div><div>WELDING</div><div>OTHER</div></div></div> <div><div>Create Service Line Item</div><div>Input Part Number</div><div><div>Search Parts Master...</div><div><input type="checkbox"/> Causal Part?</div><div><input checked="" type="checkbox"/> Non-Part Related Service Line</div></div><div>Non-Part Related Service Line Details:</div><div><div>* Service Line Type</div><div>Other</div></div><div><div>* Expense Type</div><div>SALES TAX</div></div><div><div>* UOM</div><div>-- none selected --</div><div>-- none selected --</div><div>EA</div></div></div>																														
30)	<ul style="list-style-type: none">Enter a Description, if needed or required, the Requested Quantity and Requested RateClick Next on the right of the screen	<div>CPS - Service Line Items</div> <div>Description</div> <div><div>* Requested Quantity</div><div>1</div></div> <div><div>* Requested Rate</div><div>56.25</div></div>																														
31)	The created charges will display at the bottom of the screen	<table><tr><th>Service Incident Line Num...</th><th>Causal Part?</th><th>UOM</th><th>Requested Qty</th><th>Requested Rate/Charge</th><th>Total Requested</th></tr><tr><td>Parts - 000-248-0031-S</td><td>✓</td><td>EA</td><td>1.00</td><td>750.25</td><td>750.25</td></tr><tr><td>Labor - HOURLY</td><td>✓</td><td>HR</td><td>2.00</td><td>85.00</td><td>170.00</td></tr><tr><td>Travel - TRAVEL, HOURLY</td><td></td><td>HR</td><td>2.00</td><td>85.00</td><td>170.00</td></tr><tr><td>Other - SALES TAX</td><td></td><td>EA</td><td>1.00</td><td>56.25</td><td>56.25</td></tr></table>	Service Incident Line Num...	Causal Part?	UOM	Requested Qty	Requested Rate/Charge	Total Requested	Parts - 000-248-0031-S	✓	EA	1.00	750.25	750.25	Labor - HOURLY	✓	HR	2.00	85.00	170.00	Travel - TRAVEL, HOURLY		HR	2.00	85.00	170.00	Other - SALES TAX		EA	1.00	56.25	56.25
Service Incident Line Num...	Causal Part?	UOM	Requested Qty	Requested Rate/Charge	Total Requested																											
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Travel - TRAVEL, HOURLY		HR	2.00	85.00	170.00																											
Other - SALES TAX		EA	1.00	56.25	56.25																											
32)	Attachments <ul style="list-style-type: none">To add attachments such as invoices or other supporting documentation, click on the Attachments tab below the progress barYou can upload files from your local directory, or you can drag and drop a file<ul style="list-style-type: none">To drop a file drag it onto the screen over the Or Drop Files text and when you see the blue outline, release the file	<div>Chatter Service Incident Lines Attachments Authorizations Additional Assets Review Claim Details</div> <div><div>Files (0)</div><div>Add Files</div><div><div>Upload Files</div><div>Or drop files</div></div></div> <div>Drop File</div> <div>Chatter Service Incident Lines Attachments Authorizations Additional Assets Review Claim Details</div> <div><div>Files (0)</div><div>Add Files</div><div><div>Upload Files</div><div>Or drop files</div><div>Move</div></div></div>																														
33)	Comments <ul style="list-style-type: none">To make a comment, click on the Chatter tab below the progress barEnter your commentClick Share <p>Note: This is also where a brand will put comments if needed when processing a claim</p>	<div>Chatter Service Incident Lines Attachments Authorizations Additional Assets Review Claim Details</div> <div>Post</div> <div><div>Attached documentation. Please let me know if you need anything further.</div><div><div>B</div><div>I</div><div>U</div><div>L</div><div>T</div><div>A</div><div>Link</div><div>Image</div><div>Video</div></div><div><div>Add Topic</div><div>To KC-9000105</div></div><div><div>Share</div></div></div>																														

34)	<p>Submit the Claim</p> <ul style="list-style-type: none"> The claim can be submitted once all steps in the progress bar are green, except for the Review Claim step To review what you have entered, click on Review Claim Details and Service Incident Lines When you are ready to submit the claim, click Submit on the top right of the screen 	
35)	<p>A pop-up window will display asking you to confirm you want to submit the claim and click Next</p>	
36)	<ul style="list-style-type: none"> Your claim has been submitted and the status is updated. After the claim is submitted you can still add comments on the Chatter tab and upload files on the Attachments tab. All other fields will be locked from editing. 	
37)	<p>Creating a List View/Filter You can create a list view that is visible on the home page by clicking on  at the top left of the page.</p> <p>Note: "All" view cannot be edited</p>	
38)	<p>To create the view, click on the gear on the right side of the page and click New</p>	

39)	Name the view and click Save	
40)	<ul style="list-style-type: none"> If you want to see only claims you created, leave the Filter by Owner as “My Claims” If you want to see claims created by anyone in your company, click on “My Claims” and change it to “All Claims” and click Done 	
41)	<p>To add filter criteria, click on Add Filter</p> <ul style="list-style-type: none"> Field: All fields on the claim form are available in the “Field” drop down Operator: Choose how you want to filter the information from the drop down Value: When you click in this field, the field displays drop down, click on each item to be in your view. If you do not get a dropdown you will need to populate the value(s) with a “comma” separating each value Click Done when complete 	
42)	<p>Select the fields to display in your view.</p> <ul style="list-style-type: none"> Available Fields: All fields on the claim form are in the “Available Fields” column <ul style="list-style-type: none"> To add a field, click on field and then click the ► button Visible Fields: Use the ▲ or ▼ buttons to change the order of the fields <ul style="list-style-type: none"> To remove a field, click on the field on the right and then click on ◀ Click Save <p>Note:</p> <ul style="list-style-type: none"> You are allowed up 15 selections of fields to display 	

43)	<ul style="list-style-type: none"> The saved view/filter is now available to choose in the drop down If you need to change or delete a filter, select the filter from the drop down and click on the gear on the right of the page and select Edit List Filters 	
44)	<p>Within a list view, you can do a search and the system will tell you what fields may not be searched by</p>	
45)	<p>Searching</p> <ul style="list-style-type: none"> You can use the Search bar at the top of the screen to search by a serial number, invoice number, reference number, etc. Enter the value in the search bar and hit enter. You will receive results and you can refine them more by using Refine By on the left 	
46)	<p>Logging Out</p> <p>To log out, click on your username at the top right of the page and select Logout</p>	