



Claim Entry Process & Procedure

To open a Claim in Optimum:

As you're used to, you'll need to continue to call in to East for pre-authorization before you begin any warranty work. Open a Claim in Optimum once the unit comes into your shop for warranty repairs.

1. Access the East Optimum homepage at <http://www.optimumautosolutions.com/OWEastMfg/Login.aspx>. Or at www.eastmfg.com. Log in using the username and password provided to you.

Username:
Password:

[Forgot Password?](#)

2. Once you've logged in, hover over the Claims tab and click on Claims Entry. Before you open a new Claim, check to make sure you aren't duplicating one that's already open. Enter the last five digits of the VIN in the VIN column and hit enter to search. This will bring up all the Claims in the system that has been opened on that unit. Click on the Claim Number to view the Claim.

Claim No	RO Number	Claim Date	Status	Dealer	VIN	Total	Edit	Delete
<input type="text"/>	<input type="text"/>		All	<input type="text"/>	45678			
CLS11419		10/08/2015	Open	East Manufacturing (EASTMFG)	1E1H5Y286BRA45678	\$112.50		

Check the Notes box to see why the Claim was opened. Click Cancel to return to your search results.

VIN #: 1E1H5Y286BRA45678 ✓ 📄 🗑️

Make: Platform

Model: Beast

Model Year: 2011

Notes: Brake chamber bracket broken.

Pre-Auth Repl. Order #: RPL10563 10/08/2015 Received (\$355.56)

Save Cancel

If there are no recent Claims in the system for the job you're doing, click Add New to open a new Claim.

Claim No	RO Number	Claim Date	Status	Dealer	VIN	Total	Edit	Delete
CL511419		10/08/2015	Open	East Manufacturing (EASTMFG)	1E1H5Y286BRA45678	\$112.50		

- Start by filling out the Basic Information section. If you have a reference number that you'd like to use, enter it in the Repair Order No box. Enter the last five digits of the VIN in the Serial Number box, then hit tab to auto-populate the rest of the information about the unit. The In Date should be the date that the unit comes into your shop. Enter the same date for the Repair Complete Date, you will change this after the work is complete. If you do not enter this date you will get an error message and cannot proceed. If you've been notified that the work to be done is part of an ongoing campaign, select the Campaign Code. **Provide a brief description of what's wrong with the unit in the Notes box.** When you're finished, click Save

Claim Entry New

Total Claimed Amount: \$0.00

Basic Information Print

Claim Number #: CLS11426

Repair Order No:

Claim Type: WA - Warranty

Dealer #: East Manufacturing (EAS)

Submitted by: Dealer User

Serial Number #: 45678 ✓

VIN #: 1E1H5Y286BRA45678 ✓ 📄 🗑️

Make: Platform

Model: Beast

Model Year: 2011

Claim Date #: 10/9/2015

Failure Date: 📅

In Date #: 10/9/2015 📅

Repair Complete Date: 📅

In Odometer Reading:

Out Odometer Reading:

Template Number: Please Select

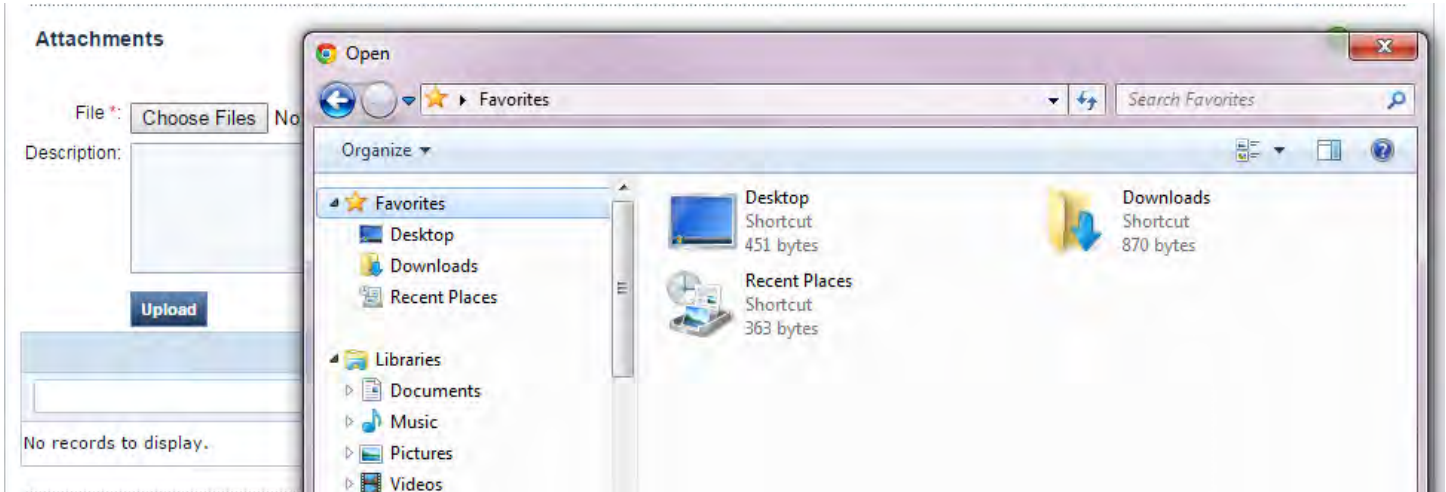
Campaign Code: Please Select

Notes: Marker lights inoperable.

Save Save & Submit Cancel

4. Use the Attachments section to add any pictures or documents that are relevant to the Claim. **Pictures of the problem must be submitted before any Claim can be processed.** Make sure the problem can be clearly seen in the pictures. Take pictures from up close and step back and take another picture of the area.

Click Add button to Choose Files to get started. Just like adding attachments to an email, a window will come up where you can browse for files on your computer.



5. Once you've selected the file you want to attach, enter a brief description of it and click Upload.



6. Next you will find a Comments box, this is where you can add any additional info you would like to share with East Mfg. You will also find any notes returned from the Warranty Dept. This is a place where there can be a running dialog about this claim. **You will also note here if you need parts sent to you to complete this repair.**
7. Once you've added all the necessary information to your Claim, click Save & Submit. **The claim will not be seen by East Warranty Dept. until the Save & Submit button is clicked. These steps should be completed prior to beginning work on the unit.**

The following steps should be completed once the job is finished.

8. In the Labor Information section, you'll add Labor Operations to provide details about the work you did on the unit. Click Add to get started. **The information you provide here is very important. Any Claims that do not have sufficient information will be returned to you for clarification.**

If East sent parts for the repair, you may find that this section has already been filled out. In this case, you'll need to edit the existing Labor Operation. We'll go over this later.

Labor Information Add
Expand All Collapse All Total Labor Claimed: \$0.00 Total Part Claimed: \$0.00

Labor Operations	Labor Description	Claimed Hours	Total Claim
No Labor added.			

9. First, you'll need to choose a Labor Operation to describe the job you did. You can add multiple Labor Operations if you need to. Start by clicking on the magnifying glass to bring up the Search box.

Labor Information Close

Part Only Operation:

Labor Operation *:

Hours *:

Failure Reason *:

Operation Description:
Labor Category:
Labor Sub Category:
Standard Rate:
Standard Hours:

Complaint Code:

Complaint:

Cause:

Correction:

Notes:

10. Here you'll find all the Labor Operations in the system. To narrow down the list, either select a Category from the dropdown menu or Search using a key word. Searching is often the fastest way, but it's a good idea to look through the Labor Operations in each Category to get an idea of what your options are while you're familiarizing yourself with the system. Note that any time you're searching in Optimum, it's best to use only one word unless you already know how something appears in the system. In the screenshot below, for example, searching for pinched wires wouldn't yield any results since the Labor Operation in the system is wire pinched.

Search ×

Category	Sub Category	Search	
<input type="text" value="Please Select"/>	<input type="text" value="Please Select"/>	<input type="text" value="light"/>	<input type="button" value="Go"/>

[Clear Search](#)

Labor No	Short Description	Category	Sub Category	Labor Type	Work Hours	
441	Broken/Corroded wires	Exterior Lighting	All Lamps	Actual	0.00	<input type="button" value="Select"/>
442	Install lights and rewire	Exterior Lighting	All Lamps	Actual	0.00	<input type="button" value="Select"/>
443	Wire pinched/nicked	Exterior Lighting	All Lamps	Actual	0.00	<input type="button" value="Select"/>
440	Replace light/lamp	Exterior Lighting	All Lamps	Actual	0.25	<input type="button" value="Select"/>
445	Replace	Exterior Lighting	Dot Tape	Actual	0.00	<input type="button" value="Select"/>

1 2 3 4

Labor No	Short Description	Category	Sub Category	Labor Type	Work Hours	
451	Replace Harness	Exterior Lighting	Harness	Actual	0.00	<input type="button" value="Select"/>
475	Replace	Exterior Lighting	Junction Box	Actual	0.00	<input type="button" value="Select"/>
480	Add	Exterior Lighting	Junction Box	Actual	0.00	<input type="button" value="Select"/>
485	Replace	Exterior Lighting	Pigtails	Actual	0.00	<input type="button" value="Select"/>
490	Other	Exterior Lighting	Pigtails	Actual	0.00	<input type="button" value="Select"/>

1 2 3 4

When you're looking through the Labor Operations, it's important to pay attention to the Category, Sub Category, *and* Description to help you choose the appropriate one. In the screenshots above, for example, the Category and Sub Category are needed to show the difference between the three Replaces you see in the search results. When you find the Labor Operation you want, click Select.

11. At this point, the Operation Description, Labor Category, and Labor Sub Category will auto-populate. The Hours field may fill in automatically to show the average allowable labor amount, but you will enter the number of labor hours you actually spent on the job.

Labor Information Close

Part Only Operation:

Labor Operation *: 440

Hours *: 1

Failure Reason *: Please Select

Operation Description: Replace light/lamp
Labor Category: Exterior Lighting
Labor Sub Category: All Lamps
Standard Rate: \$75.00
Standard Hours: 0.25

Complaint Code: Please Select

Complaint:

Cause:

Correction:

Notes:

Save Cancel

12. Next you'll select a Failure Reason and Complaint Code. Be sure to look through all your options and pick the most accurate one; only select other as a last resort. In the Complaint and Correction boxes, give a description of the problem and the fix for it. When you're finished, click Save.

Labor Information Close

Part Only Operation:

Labor Operation *: 440

Hours *: 1

Failure Reason *: 033 - Bulb Failed

Operation Description: Replace light/lamp
Labor Category: Exterior Lighting
Labor Sub Category: All Lamps
Standard Rate: \$75.00
Standard Hours: 0.25

Complaint Code: Lights Inoperable (Lights

Complaint: Marker lights inoperable.

Cause:

Correction: Replaced lights.

Notes:

Save Cancel

13. Click the Parts & Exp. button to add any parts or other expenses to your Claim. This will take you to the Parts & Expenses screen.

The screenshot shows a claim management interface. At the top, there are 'Notes' fields. Below them are 'Save' and 'Cancel' buttons. A summary bar shows 'Total Labor Claimed: \$75.00' and 'Total Part Claimed: \$0.00'. Below this is a table with columns: Line#, Labor Operations, Operation Description, Claimed Hours, Total Claim, Parts & Exp., View, Edit, and Delete. The first row has Line# 1, Labor Operations 440, Operation Description 'Replace light/lamp', Claimed Hours 1.00, and Total Claim \$75.00. The 'Parts & Exp.' button in the first row is circled in red.

14. Use the Search Parts section to add parts to your claim. There are a few ways to search for parts here. If you know the 10-digit East part number, enter it in the Part Number or Description box in xxx-xxxx-xx format and click Search. This box can also be used to search using a key word. The Classification menu is especially useful when searching by a key word since it allows you to narrow your search to parts in a specific category. Use the Supplier Part box to search using a supplier part number. If you're not getting results this way, try searching by a partial number, avoiding things like spaces and dashes. Once you've found the correct part, tell us how many you used during the repair. Check the Replacement box if you want East to send a replacement part rather than pay you for it. Check Causal if the part was the cause of the problem. When you're finished, click Add Part.

The screenshot shows the 'Parts & Expenses' screen. At the top, it displays 'Claim Code: CLS11426', 'Labor Code: 440', and 'Labor Description: Replace light/lamp'. Below this is a 'Parts' section with a table showing 'Total Parts Claimed for Labor 440: \$0.00'. The table has columns: Part No, Part Description, Qty, Rate, Total Claim, Return/Replacement, Causal, and No Charge. A yellow message says 'No Part added.' Below this are 'Save' and 'Back' buttons. The 'Search Parts' section has input fields for 'Part Number or Description', 'Classification' (set to 'All'), 'Sub-Classification', and 'Supplier part' (set to '30375Y'). There are 'Search' and 'Clear Search' buttons. Below the search fields is a table with columns: Part No, Part Description, Unit Price, Qty, Return, Replacement, Causal, No Charge, and Add Part. The first row shows Part No '535-15376-20', Part Description 'M30 AMBER LED', Unit Price '\$0.00', Qty '4', and checked boxes for 'Replacement', 'Causal', and 'Add Part'.

Use the Miscellaneous Expenses section to add any other expenses to your Claim. Select the Expense Type from the drop-down menu. Enter the per-unit price in the Price box, then the number of units. Give a description of the expense in the Additional Description box. When you're finished, click Add.

Parts & Expenses

Claim Code: CLS11426 Labor Code: 440 Labor Description: Replace light/lamp

Parts Total Parts Claimed for Labor 440: \$0.00

Part added successfully.

Part No	Part Description	Qty	Rate	Total Claim	Return	Replacement	Causal	No Charge	Delete
535-15376-20	M30 AMBER LED	4.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Back](#)

Search Parts

Miscellaneous Expenses

Expense Type: SHOPSUPPLY - Shop Sup

Description: Shop Supplies

Price: 10.00

Qty: 1

Additional Description: Nuts and bolts

[Add](#) [Cancel](#)

Once you've added all your parts and expenses, click Back to return to the Claim Entry screen.

Parts & Expenses

Claim Code: CLS11426 Labor Code: 440 Labor Description: Replace light/lamp

Parts Total Parts Claimed for Labor 440: \$10.00

Part added successfully.

Part No	Part Description	Qty	Rate	Total Claim	Return	Replacement	Causal	No Charge	Delete
535-15376-20	M30 AMBER LED	4.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
SHOPSUPPLY	Shop Supplies Nuts and bolts	1.00	\$10.00	\$10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

[Save](#) [Back](#)

If you need to add another Labor Operation, click Add at the top of the Labor Information section and repeat the process.

Labor Information [Add](#)

[Expand All](#) [Collapse All](#) Total Labor Claimed: \$75.00 Total Part Claimed: \$10.00

Line#	Labor Operations	Operation Description	Claimed Hours	Total Claim	Parts & Exp.	View	Edit	Delete
1	440	Replace light/lamp	1.00	\$75.00	Parts & Exp.	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Part No	Part Description	Claimed Qty	Approved Qty	Rate	Total Claim	Return	Replacement	Causal	No Charge
535-15376-20	M30 AMBER LED	4.00	0	\$8.43	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
SHOPSUPPLY	Shop Supplies Nuts and bolts	1.00	0	\$10.00	\$10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Once you've entered all of the information you have, please click Save at the top of the screen. Your claim is now ready to be processed.

While your Claim is being processed:

1. You'll receive an email if clarification is requested on any part of the Claim. Go back into your open Claim and check the Comments section at the bottom of the page to view the request. Make any necessary changes to the Claim and type a response in the Comments section, then **click Submit Clarification** to notify East that you've responded. **All processing of this claim has stopped until you make the changes and hit "Submit Clarification".**



Comments

See attachments.

[Save](#) [Submit Clarification](#)

By Sarah Burdette on 10/12/2015 1:26:16 AM EDT

Please provide pictures.

- If you've added a part to your Claim that will need to be returned to East, you will be given an RMA# and instructions on how to return the part. On your home screen you will see a table listed "My RMA(Parts Returns)".

The screenshot displays the EAST Warranty / Service Management Solution interface. At the top, there is a navigation bar with 'Home', 'Product', 'Claims', 'Master Data', and 'Help'. The user is logged in as 'Dealer User' with a 'Logout' option. The main content area is divided into three sections:

- My Open Claims:** A table with columns: Claim No, Date, Serial Number, VIN, Status, Amount, Process. One claim is listed: CLS11786, 02/10/2016, 58306, 1E1H5Y284HR058306, Open, \$111.68.
- My Open Pre-Auth:** A section for pre-authorized claims.
- My RMA(Parts Returns):** A table with columns: RMA No, Date, Serial Number, VIN, RMA Status, Process. Three RMAs are listed:

RMA No	Date	Serial Number	VIN	RMA Status	Process
RMA90007	10/13/2015	45678	1E1H5Y286BRA45678	Shipped	
RMA90008	10/13/2015	51127	1E1H5Z289FR051127	Authorized	
RMA90013	02/10/2016	58306	1E1H5Y284HR058306	New	

The right-hand sidebar contains an 'Overview' section with a bar chart for 'Top Labor Categories' and a 'Top 5 Models (on #Claims)' section.

Here you will see the RMA's for your claims and their status. Click on the RMA you would like to process.

The screenshot shows the RMA (Return Merchandise Authorization) form. The form contains the following fields:

- RMA No: RMA90013
- RMA Date: 02/10/2016
- Claim Number: CLS11786
- Claim Date: 02/10/2016
- Dealer: East Manufacturing (EASTMF)
- Make: Platform
- Model: Beast
- Model Year: 2017
- Contact Name: Kathryn Penny
- Address 1: 1871 State Route 44
- Address 2: P.O. Box 277
- City: Randolph
- Country: USA
- State: OH - Ohio
- Zip: 44265
- Notes: (Empty text area)
- Shipper's Name: (Empty field)
- Tracking No: (Empty field)
- Shipped Date: (Empty field)
- Shipping Cost: (Empty field)
- Received Date: (Empty field)

Below the form is a 'Parts Returns' table with columns: Part No, Description, UOM, Qty. One part is listed: 535-15375-20, M30 RED LED, EA, 1.00. The form has 'Save' and 'Cancel' buttons at the bottom.

This screen gives you the shipping address and what parts we need sent back to East on this claim. You will fill in the column to the far right. Click Ship when you send the part out. You will see the status change from Authorized to Shipped. When East receives the part it will change to Received and will come off your "My RMA(Parts Returns)". This completes the RMA process.

To edit a Labor Operation:

If East sends parts for a repair before the labor has been added to the Claim, you'll find a "PartOnly" Labor Operation on your Claim. You'll need to change this once you've completed the job to provide details about the work you did on the unit. First, click Edit to make changes to the Labor Operation.

Labor Information Add

Expand All Collapse All Total Labor Claimed: \$0.00 Total Part Claimed: \$0.00

Line#	Labor Operations	Operation Description	Claimed Hours	Total Claim	Parts & Exp.	View	Edit	Delete
1	PartOnly	Parts Only	0.00	\$0.00	Parts & Exp.			

Part No	Part Description	Claimed Qty	Approved Qty	Rate	Total Claim	Return	Replacement	Causal	No Charge
535-15376-20	M30 AMBER LED	4.00	0	\$8.43	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

Here you'll see detailed information about the existing Labor Operation. Delete the contents of the Labor Operation box and hit tab to remove it from the Claim.

Labor Information Close

Labor Operation #: PartOnly

Hours #: 0.00

Failure Reason #: 033 - Bulb Failed

Complaint Code: Lights Inoperable (Lights)

Complaint: Marker lights inoperable.

Cause:

Correction: Sent replacement parts.

Notes:

Save Cancel

Expand All Collapse All Total Labor Claimed: \$0.00 Total Part Claimed: \$0.00

Line#	Labor Operations	Operation Description	Claimed Hours	Total Claim	Parts & Exp.	View	Edit	Delete
1	PartOnly	Parts Only	0.00	\$0.00	Parts & Exp.			

Click the magnifying glass to bring up the Search box. When you find the appropriate Labor Operation, click Select.

Labor Information Close

Labor Operation #:

Hours #:

Failure Reason #: 033

Complaint Code: Lights Inoperable (Lights)

Complaint:

Operation Description:

Labor Category:

Labor Sub Category:

Standard Rate:

Standard Hours:

Search X

Category: Please Select Sub Category: Please Select Search: light

Labor No	Short Description	Category	Sub Category	Labor Type	Work Hours	
441	Broken/Corroded wires	Exterior Lighting	All Lamps	Actual	0.00	<input type="button" value="Select"/>
442	Install lights and rewire	Exterior Lighting	All Lamps	Actual	0.00	<input type="button" value="Select"/>
443	Wire pinched/broken	Exterior Lighting	All Lamps	Actual	0.00	<input type="button" value="Select"/>

Before you can enter your labor hours, you'll need to click Save to apply the changes to your Claim.

Close

Labor Information

Labor Operation #:

Hours #:

Failure Reason #:

Operation Description: Replace light/lamp
 Labor Category: Exterior Lighting
 Labor Sub Category: All Lamps
 Standard Rate: \$75.00
 Standard Hours: 0.25

Complaint Code:

Complaint:

Cause:

Correction:

Notes:

Expand All Collapse All
Total Labor Claimed: \$0.00
Total Part Claimed: \$0.00

Line#	Labor Operations	Operation Description	Claimed Hours	Total Claim	Parts & Exp.	View	Edit	Delete
1	PartOnly	Parts Only	0.00	\$0.00	Parts & Exp.			

Click Edit to go back into the Labor Operation. Add your labor hours and make any necessary changes to the Complaint and Correction boxes. When you're finished, click Save.

Close

Labor Information

Labor Operation #:

Hours #:

Failure Reason #:

Operation Description: Replace light/lamp
 Labor Category: Exterior Lighting
 Labor Sub Category: All Lamps
 Standard Rate: 75.00
 Standard Hours: 0.25

Complaint Code:

Complaint:

Cause:

Correction:

Notes:

Expand All Collapse All
Total Labor Claimed: \$18.75
Total Part Claimed: \$0.00

Line#	Labor Operations	Operation Description	Claimed Hours	Total Claim	Parts & Exp.	View	Edit	Delete
1	440	Replace light/lamp	0.25	\$18.75	Parts & Exp.			

If you need to edit or add any parts or expenses, click Parts & Exp to go to the Parts & Expenses screen.

Expand All Collapse All Total Labor Claimed: \$75.00 Total Part Claimed: \$0.00

Line#	Labor Operations	Operation Description	Claimed Hours	Total Claim	Parts & Exp.	View	Edit	Delete
1	440	Replace light/lamp	1.00	\$75.00	Parts & Exp.			

Part No	Part Description	Claimed Qty	Approved Qty	Rate	Total Claim	Return	Replacement	Causal	No Charge
535-15376-20	M30 AMBER LED	4.00	0	\$8.43	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>

If you used more or fewer of a part that's already been added to the Claim, adjust the number in the Qty box and click Save. If you need to edit an expense, Delete it by clicking on the red null symbol and then add it again in the appropriate amount. As outlined in Step 10 above, use the Search Parts section to add any other parts to the Claim and the Miscellaneous Expenses section to add any other expenses. When you're finished, click Back to return to the Claim Entry screen. From here, you can continue adding information to your Claim as normal.

Parts & Expenses

Claim Code: CLS11426 Labor Code: 440 Labor Description: Replace light/lamp

Parts Total Parts Claimed for Labor 440: \$10.00

Part No	Part Description	Qty	Rate	Total Claim	Return	Replacement	Causal	No Charge	Delete
535-15376-20	M30 AMBER LED	4.00	\$0.00	\$0.00	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
SHOPSUPPLY	Shop Supplies Nuts and bolts	1.00	\$10.00	\$10.00	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

[Save](#) [Back](#)

Search Parts

Miscellaneous Expenses

Part added successfully.

Expense Type *: Please Select ▼

Description: _____

Price *:

Qty *:

Additional Description *:

[Add](#) [Cancel](#)