Learn How to Create a Repair Order

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Creating a Repair Order

The following repair orders can be created on the Repair Order Portal:

• Repair order for an entitled unit under warranty or contract
• Repair order for per incident repair (billable, time and material repair)
• Repair orders for a repeat repair. If the repair displays as billable, the user can dispute the entitlement and proceed with the submission of the repair order

The following information provides an overview of the process to create a repair order on the Repair Order Portal
Overview of Creating a Repair Order

The repair order creation process has 5 sections, represented by displayed at the top of the new repair order screen. To create and submit the repair order, the user must progress through the 5 sections, providing applicable information. Once the repair order has been submitted, the Order Confirmation screen displays and a repair order number is provided.

Information on the following slide outlines the required information within each section.
Overview of Creating a Repair Order

- **Shipping Details:** Select the contact name, ship to address, and return shipment details for the repair order.

- **Add Products:** Document the serial number or product model for the faulty product. Entitlement information is validated, providing real-time confirmation of entitlement.

- **Review Cart:** Review the repair order information prior to submission.

- **Payment Details:** Provide payment information for billable repair (faulty unit not entitled by warranty or service contract).

- **Order Confirmation:** Final page, displays once the repair order is submitted. A repair order number is generated & provided for confirmation.

The following information outlines the process steps to create a repair order on the Repair Order Portal.
Initiating a New Repair Order

**Step 1:** Access the *Repair Orders* tab
Initiating a New Repair Order

The **Pending Repair Orders** screen displays

**Step 2:** Click on **NEW REPAIR ORDER**

Once the **NEW REPAIR ORDER** button is clicked, a cart is created. The cart number does not display until the cart is saved or the repair order is submitted. If the user exits from the repair order creation process, without saving the cart or submitting the repair order, the pending cart is saved & accessible in the **Repair Orders** tab. Pending carts are automatically cancelled after thirty (30) days.
Selecting a Shipping Contact

The *Shipping Details* screen displays. The values in the *Shipping Contact* and *Return Shipping Address* sections default. These values display on repair order documents and can be modified.

**Step 3:** Review the default contact record information displayed in the *Shipping Contact* section. Users are not able to directly edit these fields. The following options are available:

- **Select a different contact record:** Click on **»** to display the Contact pop-up window. Contact records display for selection.
- **Create a new contact record:** Click on **»** to display the Contact pop-up window. Click on **NEW** and populate the required information.
- **Edit the phone number of a contact record:** Click on **»** to display the Contact pop-up window. Select the contact record and click on **UPDATE PHONE NUMBER** to modify the phone number.

The following information outlines the options available in the **Contact** pop-up window:

- **Utilize the Customer Reference #:** Use the field to document a reference number for the repair order.
- The selected contact record displays on the shipping manifest and return shipping documents.
- This contact also receives an email notification once the repair order is submitted.

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**Creating a Repair Order**

The selected contact record displays on the shipping manifest and return shipping documents. This contact also receives an email notification once the repair order is submitted.
Selecting a Shipping Contact Record

When the **Contact** pop-up window displays, a list of active contacts associated with the user’s account are available for selection. The user can select a contact from the list, use filters to conduct a search, create a new contact, or update the phone number associated with an existing contact record.

**NOTE:** The email address associated to the contact can not be modified. Create a new contact record if a new email address needs to be referenced.
Selecting a Return Shipping Address

Step 4: The default shipping address information is always blank unless saved in User Preferences otherwise. Users are not able to directly edit these fields. The following options are available:

- Select a ship address: Click on the Address pop-up window. Shipping address records display for selection
- Create a new shipping address: Click on the Address pop-up window. Click on and populate the required information

NOTE: The Return Shipping Address section displays default address information based on user preference. Users can modify the shipping address during the creation of the repair order. This change does not modify the default address preference. To modify the default address, update user preferences.

The following information outlines the options available in the Address pop-up window
Selecting a Return Shipping Address Record

When the Address pop-up window displays, shipping addresses associated with the user’s account are available for selection. The user can select an address from the list, use filters to conduct a search, or create a new address.

NOTE: The shipping address can not be modified. Create a new shipping address if changes need to be made to an existing address.
Specifying Return Shipment Information

The optional, *Return Shipment Details (Optional)* section allows users to specify the carrier and method of the return shipment. If left blank, return shipping is provided by Zebra’s preferred carrier and standard method.

- If return shipping details need to be populated, continue to **Step 5**
- If return shipping details do not need to be populated, proceed to **Step 8**

**Step 5:** Select the applicable preferred return shipping carrier from the **Ship Carrier:** field – *if applicable*

**Step 6:** Select the applicable shipping method from the **Shipping Method:** field – *if applicable*

**Step 7:** Type the shipping account number in the **Shipping Account:** field – *if applicable*
Completing the Shipping Details Section

Step 8: Click on **NEXT** to proceed to the **Add Products** screen.

**NOTE:** If the user exits the **Shipping Details** screen without clicking the **SAVE & EXIT** button, the cart is saved without repair lines. The pending cart is accessible in the **Repair Status** tab and is automatically cancelled after thirty (30) days.
Adding Products for Repair

The *Add Products* screen displays. The following information outlines the key sections of the *Add Products* screen:

- **The Add Products section** allows users to identify the serial number or product model for repair.
  - If the serial number is known, the serial number can be typed. If the serial number is unknown, the user can select the product model from a list of active products.
- **The Add button** is used to add the identified serial number to the shopping cart.
- **The Reset button** clears the serial number information from the Add Product section.
- **The Bulk Load button** allows the user to initiate the bulk load process.

*The Product Details section* expands once products are identified and added to the cart from the Add Product section.
Utilizing the Available Transactional Buttons

The Add Products screen has a number of transactional buttons which allow the user to add new devices for repair, manage the cart or progress the repair order. The following information outlines the key buttons available:

Within the **Product Details** section, two transactional buttons are available:

- **Remove**: Remove a selected line from the cart
- **Add Another Product**: Clears the page and allows the user to add another device to the cart

**NOTE**: Once the Add Another Product button is clicked, the product details section no longer reflects the details for the serial number.

Additional navigational buttons are available once the user has added all products to the cart:

- **Previous**: Return to the previous screen
- **Save & Exit**: Save the cart. The repair order is not submitted
- **Next**: Progress to the next screen, **Review Cart**, to review the items in your cart

**The following steps outline the process to add products to the repair order**
Adding Products with a Known Serial Number

Step 9: Type the serial number of the device in the **Serial #** field and **continue** to Step 11

**NOTE:** If the **serial number is unknown**, proceed to Step 10 for instructions to add a product without a known serial number

Utilize the **How to find your serial#** help link if you need help locating the serial number on the product.
Adding Products without a Known Serial Number

The following steps should be completed when the serial number of the product is unknown and a repair order needs to be submitted.

Step 10: Click the I don’t have a Serial #: checkbox

Step 10a: Click on

When a unit is added to the repair order without a serial number, entitlement can not be validated. The repair is considered a per incident repair (billable/time and material). If the unit is covered under warranty or contract, the billable status can be disputed, after adding the item to the cart. The dispute should be requested prior to submitting the repair order.
Adding Products without a Known Serial Number

The *Pick Product* pop-up screen displays active product models. The user can select the product model from the list, or use filters to conduct a search.

**Step 10b:** Click the applicable product model from the list or conduct a search for the model

**Step 10c:** Click on the product model.
Selecting a Problem Type & Identifying a Problem Description

The *Add Products* screen displays the selected model in the **Product Name:** field. Continue to **Step 11**

**Step 11:** Select the applicable problem from the **Problem Category:** field

**Step 11a:** Select the applicable detail from the **Problem Detail:** field

**Step 12:** Type the description of the problem in the **Problem Description:** field

**Step 13:** Click on **Add**

The following transactional buttons are available for Users to manage the cart:

- **Reset:** Clears our inputted information in Add Products section
- **Add:** Adds item to the cart
- **Bulk Upload:** Allows the user to initiate the bulk load process, enabling the upload of multiple faulty devices from a formatted file
**Reviewing Items in the Cart**

Once **ADD** is clicked, the serial number is confirmed. If the serial number is valid, the device is added to the cart and the **Product Details** section displays the product and repair information. The following are key elements of the **Product Details** section:

- **Job Type** field identifies the type of repair: billable, contract or warranty. This information defaults based on the system determined entitlement.
- The **Dispute** section allows the user to dispute the entitlement information.
- The **Problem Category**, **Problem Detail**, and **Problem Description** can be edited from the **Product Details** section.
Step 14: Review the **Job Type** field to verify the repair type of the line(s)

The following values display in the **Job Type** field:

- **Billable**: The repair is not covered under warranty or a service contract. A quote for the cost of the repair is available in the **Net Price** field and payment information needs to be provided. Billing does not occur until the repair is completed.

- **Warranty**: The repair is covered by the product warranty.

- **Contract**: The repair is covered under the agreement of the service contract.

If the job type references **billable** and the unit should be entitled under warranty or contract, a **dispute** can be requested. When disputed, payment information does not need to be provided and the user can proceed with submitting the repair order. The user should request the dispute prior to submission.
Step 15: Review the **Net Price** field to review the cost of the repair

- For billable repairs, the estimated cost of the repair displays in the user’s currency
- For warranty and contract repairs, a value of $0.00 displays
Adding to Cart

Step 16: Click on the button to add a product. Repeat Steps 9 – 15, if necessary, to add additional products to the repair order, if necessary.

The device is added to the cart if the serial number or product model is valid and a pending repair order does not exist.
Completing the Add Products Section

Step 17: Click on **NEXT** to proceed to the **Review Cart** screen

*Note:* Once clicking on **ADD ANOTHER PRODUCT** or **NEXT**, accessing and modifying line information is available only on the **Review Cart** screen.
Reviewing the Repair Cart Information

The *Review Cart* screen displays

**Step 18:** Review the *Account Information, Contact Details* and *Shipping Details*

**Step 19:** Review the repair line information. The following options are available:

- **Edit:** Edit the Customer Reference #, Problem Category, Problem Detail and Problem Description
- **Delete:** Delete the selected item(s)
- **Dispute:** Dispute the determined entitlement
- **Remove Dispute:** Deletes the dispute associated with the selected line(s)
- **Kits and Configurations:** Add Kits and Configurations to enabled items
- **Documents:** Attach documents to selected items

These fields cannot be edited in the *Review Cart* screen. If the information needs to be updated, a new repair order needs to be created.
Reviewing the Repair Cart Information

The *Review Cart* screen displays

**Step 20:** Click on the **PAYMENT** button to continue to the *Payment Details* screen or click on the **CONFIRM** button to finalize the order and proceed to the *Order Confirmation* screen, refer to page 32

- The **PAYMENT** button displays when there are billable devices on the repair order. When the user clicks on the **PAYMENT** button, the *Payment Details* screen displays, prompting the user for payment information.

- The **CONFIRM** button only displays if all devices are covered under warranty or contract. The user bypasses the *Payment Details* screen and proceeds to the *Order Confirmation* screen. Proceed to page 32 for details.
Providing Payment Details for Billable Repairs

The **Payment Details** screen displays for billable repair lines. Repair charges display and the user is prompted for payment information:

- If a purchase order can be used for payment, the applicable PO fields display. Continue to **step 21** for details to pay using a purchase order.

- If credit card fields default in the **Payment Details** screen, the user must pay using a credit card. Continue to **step 22** for details.

*Credit card payments are only available in North America, Europe, and the Middle East.*
Paying by Purchase Order for Billable Repairs

Step 21: Type the purchase order number in the **Purchase Order #** field

Step 21a: Review the billing address listed in the Billing Address section. To select or create a new billing address, click on to display the Address pop-up window to select or add a new address

Step 21b: Click on to select and attach the purchase order file

Step 21c: Click on to submit the repair order and proceed to the **Order Confirmation** screen. Proceed to page 31 for details
Paying by Credit Card for Billable Repairs

Step 22: Type the card holder name in the Credit Card Holder: field

Step 22a: Select the type of credit card from the Credit Card Type: field

Step 22b: Type the credit card number in the Credit Card #: field

Step 22c: Select the expiration year from the Expiration Year: field

Step 22d: Select the expiration month from the Expiration Month: field

Step 22e: Type the 3-4 CVN digits in the CVN: field
Paying by **Credit Card** for Billable Repairs

**Step 22f:** Review the billing address listed in the Billing Address section. To select or create a new billing address, click on ![check mark] to display the **Billing Address** pop-up window. Billing address records display for selection.

- Select a different billing address: Click on ![check mark] to display the **Billing Address** pop-up window. Billing address records display for selection.
- Create a new billing address: Click on ![check mark] to display the **Billing Address** pop-up window. Click on ![new] and populate the required information.

**Step 22g:** Attach documents to the payment.
Selecting a Billing Address

When the Billing Address drop down field is accessed, the Billing Address pop-up window displays billing addresses associated with the user’s account. The user can select an address from the list, use filters to conduct a search, or create a new address.

Click on NEW to create a new billing address record

Utilize the search bar to locate an existing billing address

To select a different billing address, select the applicable record and click on OK

NOTE: The billing address can not be modified. Create a new billing address if changes need to be made to an existing address
Paying by **Credit Card** for Billable Repairs

**Step 22h:** Click on **CONFIRM** to submit the repair order and proceed to the **Order Confirmation** screen. Proceed to page 32 for details.

Zebra Technologies performs a $1.00 hold on the credit card to ensure validity. The hold is removed based on the policies of the credit card company. Once the repair is complete, the cost of the repair is charged to the credit card.
Completing the Repair Order – Order Confirmation

The **Order Confirmation** page displays when the repair order is submitted. The **repair order number** is provided, confirming the submission. This activity occurs once the **CONFIRM** button is clicked on the **Payment Details** screen for billable repairs or when **CONFIRM** is clicked on the **Review Cart** screen for entitled repairs.

**NOTE:** An email notification containing the order acknowledgement and shipping manifest is sent to the user and the shipping contact selected on the repair order. Please print the shipping manifest and include inside the shipping box.

Once the repair order is submitted, the user can generate the shipping label or schedule the pickup or collection of the device(s), if entitled for the services.

Return the faulty unit(s) to the Repair Center, within **30 days**. If the unit(s) is not received within 30 days, the repair order is cancelled, without notification.

To check status of a submitted repair order, utilize the **Order Status** tab to search and view the repair order details. If a repair order needs to be cancelled or modified, contact the Repair Help Desk for assistance.
Helpful Hints

The following are helpful hints for creating and managing your repair order:

- Your repair order is **not submitted** until the Order Confirmation screen displays and a repair order number is provided.
- A new shipping address can be created, if the requested shipping address for the repair order is not setup.
- If you exit the repair order creation process without saving the cart or submitting the repair order, the cart is pending and is accessible in the Repair Orders tab.
- A pending cart, unsubmitted repair order, is automatically cancelled after **thirty (30) days**.
- If the you are prompted for payment information and the serial number is under warranty or contract, you can **dispute** the entitlement information and proceed with submitting the repair order. [Click here](#) to learn how to dispute the entitlement information.
- Contact the Repair Help Desk if you need to cancel or modify your submitted repair order. [Click here](#) to locate the right phone number.
- If you want to check status of the repair order, access the Order Status tab and search for the repair order.
- If you’re entitled for a inbound prepaid shipping label or the pickup / collection service, click on [Generate Shipping Label](#) from the Order Confirmation screen.
Need help?

Access Zebra.com > Support & Downloads for additional information and support.