

Claim Portal

User Instruction

23/05/2022

Giulia Nannetti



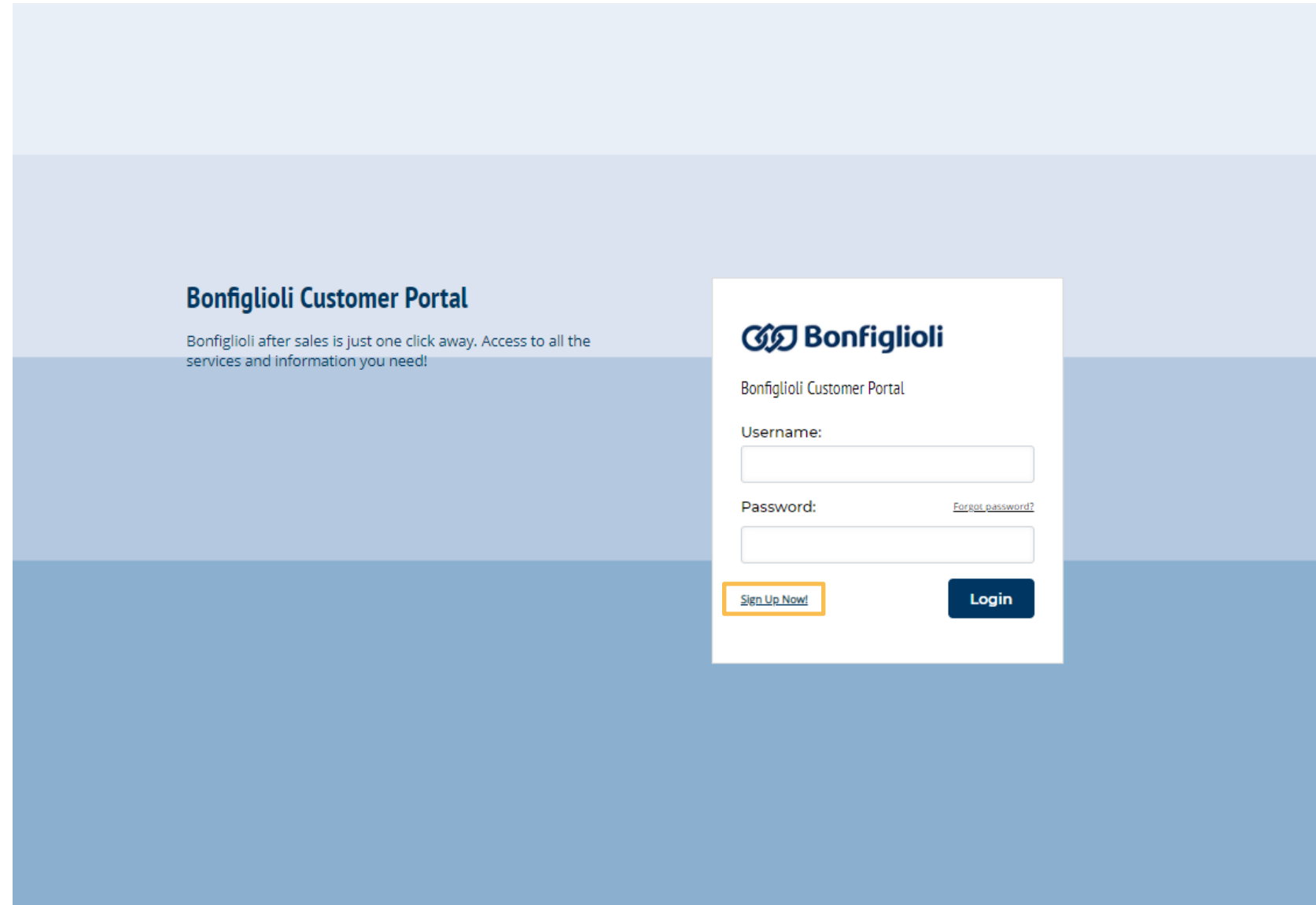
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Login

The Bonfiglioli Claim Portal can be reached at the following address:
<https://claimenquiry.bonfiglioli.com>

The login can be made with the first access credential received from:
noreply@salesforce.com, go to page 4.

Otherwise you can sign up clicking on the «**Sign Up Now!**», go to page 3.



The screenshot displays the Bonfiglioli Customer Portal login interface. The background is a light blue gradient. On the left, the text "Bonfiglioli Customer Portal" is displayed in a bold, dark blue font, followed by a smaller line of text: "Bonfiglioli after sales is just one click away. Access to all the services and information you need!". On the right, there is a white login form. The form features the Bonfiglioli logo at the top, followed by the text "Bonfiglioli Customer Portal". Below this, there are two input fields: "Username:" and "Password:". The "Password:" field has a link "Forgot password?" to its right. At the bottom of the form, there are two buttons: "Sign Up Now!" (highlighted with an orange border) and "Login" (a solid dark blue button).

Registration

Bonfiglioli Portal Registration

First Name*	Last Name*
<input type="text"/>	<input type="text"/>
Email*	Company Name*
<input type="text"/>	<input type="text"/>
User Name*	Password*
<input type="text"/>	<input type="text"/>
Language*	Country
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>

Registration

Cancel

Login

To complete the registration just fill the fields with the red asterisk and click on «**Registration**»
You will receive a first mail of registration confirmed and a second one that authorize you to use the system. At this point you can login in in the portal.

Dashboard



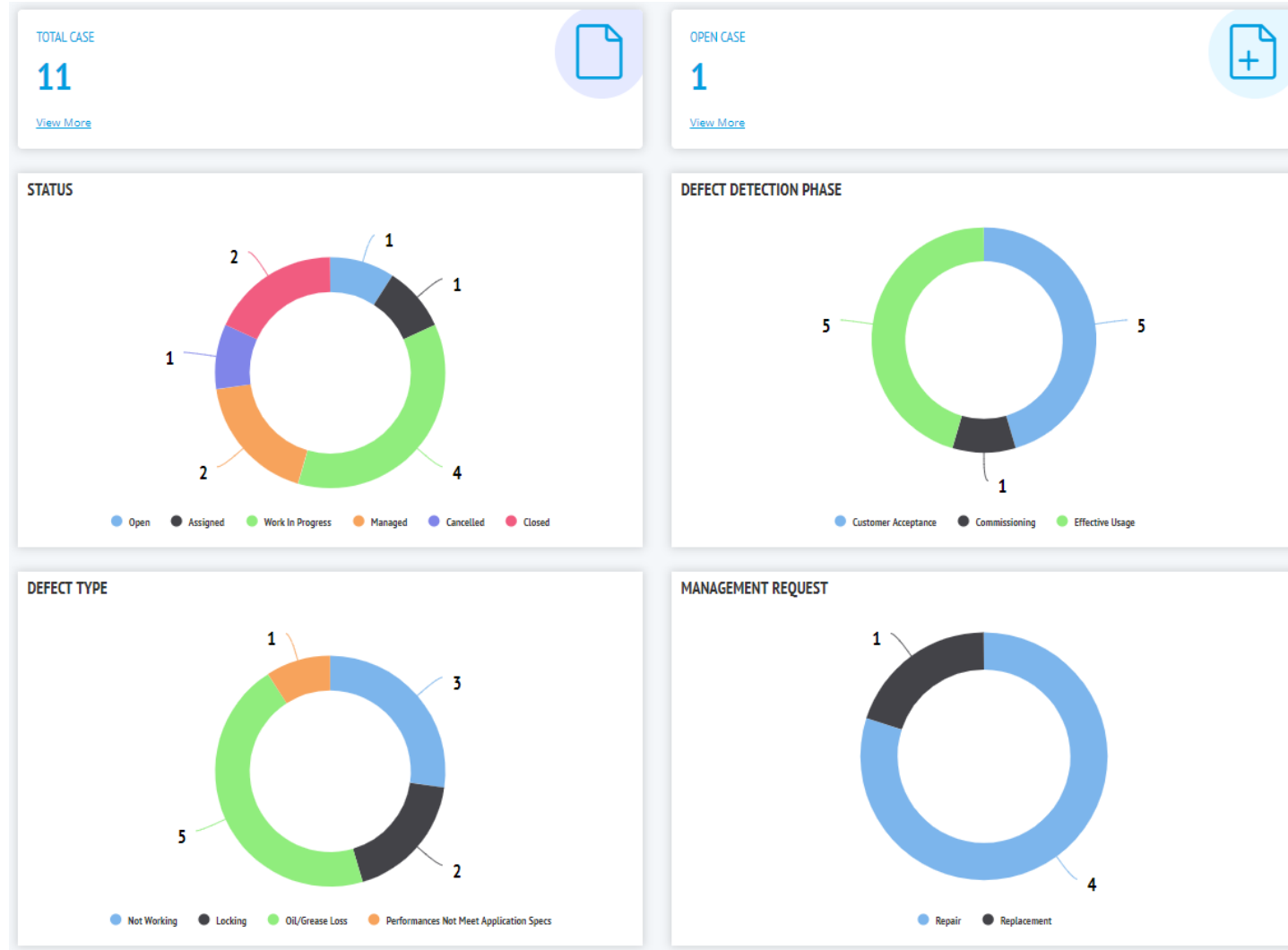
Dashboard

Cases

After the login you will find a summary of the status of your cases, dashboard.

You will find the number of total cases and of the ones still open, plus a series of graph with detailed information about:

- Status
- Defect detection phase
- Defect type
- Type of management



Cases

[Dashboard](#)[Cases](#)

Moving to the Cases page, you will find the detailed list of all the opened cases.

It is possible to make a search by key word:



Or setting the filters:



Clicking on «**All Cases**» it will be possible to see the lists of all the cases opened on your customer code. So also the ones updated by your colleagues.

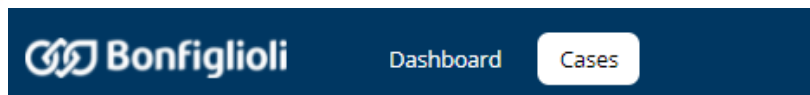
Selecting a case you will be able to see the details, the related comments and attachments.

Cases

[+ Add](#)[My Cases](#)[All Cases](#)

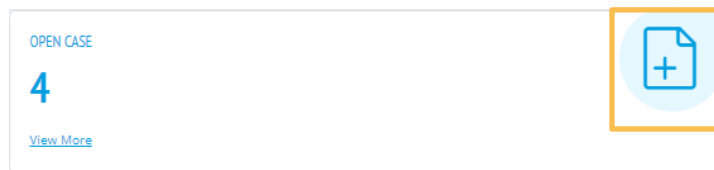
CASE NUMBER	SUBJECT	MATERIAL NUMBER	CREATED DATE	STATUS	CREATED BY	ACTIONS
00001584	test 22/06	2T716C2016A01	June 22, 2021 10:05 am	Work In Progress	giulia nannetti	
00001510	nc ## test 31/05	2T716C2016A01	May 31, 2021 8:39 am	Work In Progress	giulia nannetti	
00001500	test 24/05	2T716C2016A01	May 24, 2021 2:07 pm	Managed	giulia nannetti	
00001432	test 17/05	2T716C2016A01	May 17, 2021 9:11 am	Managed	giulia nannetti	
00001430	test 18/02_ Vecrton	2T716C2016A01	May 10, 2021 11:09 am	Work In Progress	giulia nannetti	
00001429	test 10.05	2T716C2016A01	May 10, 2021 9:15 am	Work In Progress	giulia nannetti	
00001256	test 17/03_5	2T700C2K036006	March 17, 2021 2:40 pm	Closed	giulia nannetti	-
00001251	test 17/03_4	2T255608241A	March 17, 2021 11:09 am	Cancelled	giulia nannetti	-
00001248	test 17/03_3	2T716C2016A02	March 17, 2021 9:51 am	Closed	giulia nannetti	-
00001244	test 17/03_2	2T716C2016A01	March 17, 2021 9:19 am	Open	giulia nannetti	

Creation of a New Case





To create a new case just click on the button: 


Or on the button on the landing page:



You will get to a new window where it will be possible to insert the information needed to open a new claim.








 Cases

 Add



My Cases

All Cases

CASE NUMBER	SUBJECT	MATERIAL NUMBER	CREATED DATE	STATUS	CREATED BY	ACTIONS
00001584	test 22/06	2T716C2016A01	June 22, 2021 10:05 am	Work In Progress	giulia nannetti	
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00001244	test 17/03_2	2T716C2016A01	March 17, 2021 9:19 am	Open	giulia nannetti	

Creation of a New Case

First information

 **Add Case**

- ☐ Serial Number ⓘ
- ☐ Material Number ⓘ
- ☐ Customer Material Number

Next

You will now have the possibility to enter 3 different information for the creation of the claim:

Serial Number: the Bonfiglioli serial, in this case all the information related to material code and warranty document will be filled in automatically

Material Number: Bonfiglioli part code

Enter Material Number


[Verify](#)

Clicking on the Verify button the system will check if the code exists in our database

Customer Material Number: your material number, if present in our database it will be automatically transformed in Bonfiglioli part code

Creation of a New Case

Form for the creation of a new case

 **Add Case**

Subject*	Problem Description
<input type="text"/>	<input type="text"/>
Material Number ⓘ *	Serial Number ⓘ
<input type="text"/>	<input type="text"/>
Quantity*	Doc. Start Warranty
<input type="text"/>	<input type="text"/>
Date Doc. Start Warranty	Detection Phase*
<input type="text"/>	<input type="text" value="--None--"/>
Product Purchased From*	Defect Type*
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>
Defect Location*	Required Management
<input type="text" value="--None--"/>	<input type="text" value="--None--"/>
Attachment ⓘ	
<input type="text" value="Choose File"/>	<input type="button" value="Upload"/>

Based on the information entered in the first screen you will have different fields filled. The fields with the red asterisk are mandatory for the creation of a new case.

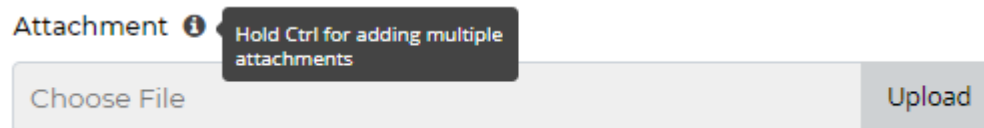
- Subject:** Customer reference for the case
- Material Number:** Bonfiglioli part code
- Serial Number:** Bonfiglioli serial of the claimed unit
- Doc. Start warranty:** Delivery Note or Invoice of the claimed part

The other fields are all selectable from the drop-down menu.

Creation of a New Case

Form for the creation of a new case

Attachment: it is possible to upload more than one at the same time, just hold Ctrl during the selection.



Product purchased from: from the drop-down menu select the company of the Bonfiglioli group from which you have purchased the material

Once the case has been saved you will receive an automatic mail confirming the creation, whit the reference number of the case.



Creation of a New Case

Quantity > 1 for finished products

If you created the case starting from the serial number and you selected a quantity higher than one the system will land on a prefilled form in which you will be able to add the other serial numbers:

Case Line 1

B6201604900

Case Line 2

Enter Serial Number

Case Line 3

Enter Serial Number

Previous

Save

The first line will be automatically filled with the serial number provided at the beginning. On the other case lines you can add the other serial numbers with the same issue.

Please consider that the products claimed together should have the same defect.

Checking a Case


[Dashboard](#)[Cases](#)


In the Cases section, clicking on the line of interest you will be able to access the details of the case.

On the left part of the screen you will find all the information originally updated in the case, and eventually the updates from Bonfiglioli side.

Case Number:	00001584
Subject:	test 22/06
Problem Description:	test
Material Number:	2T716C2016A01
Serial Number:	-
Quantity:	1
Doc. Start Warranty:	na
Date Doc. Start Warranty:	-
Business Unit:	Mobile
Detection Phase:	Customer acceptance
Product Purchased From:	Bonfiglioli Riduttori Trasmital (B6)
Defect Type:	Locking
Defect Location:	Gearbox
Required Management:	-

[Case Comments](#) [Attachments](#) [Serial Numbers](#) [Repairs Details](#)

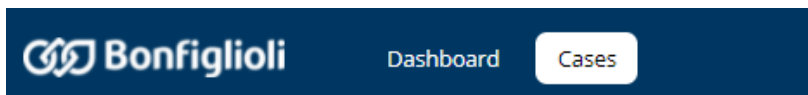
 **Giulia Nannetti** June 22, 2021 10:07 am
Ciao, mandami il S/N, foto targhetta

 **giulia nannetti** June 22, 2021 10:08 am
ok allegata

Comment

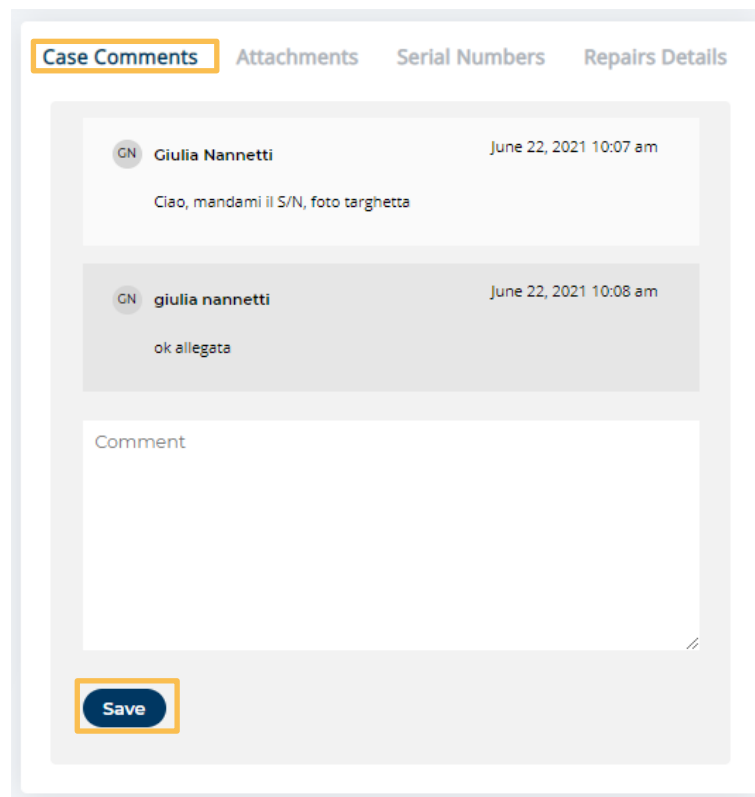
Save

Checking a Case



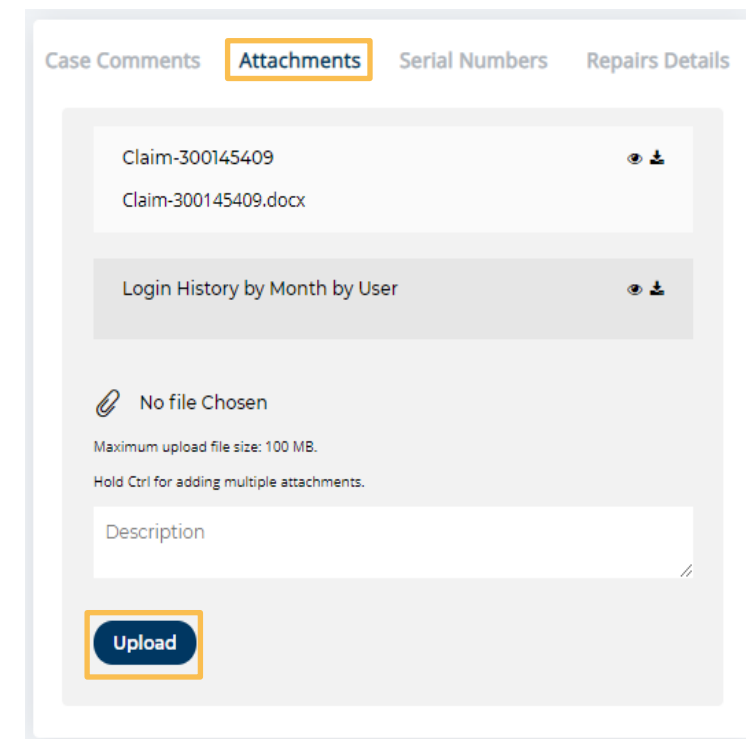
On the right side we find four section

Case Comments: It is the history of the communication with Bonfiglioli on the case in object. At any time it is possible to add a comment and send it out just clicking on **Save**.

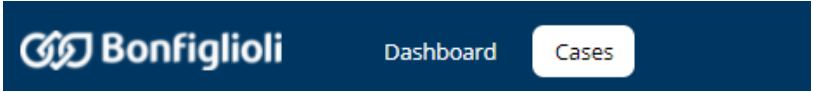


Attachments: It is the history of what has been added to the cases both on customer's and Bonfiglioli side. At any time it is possible to add one or more attachment just clicking on **Upload**.

Each time Bonfiglioli add a comment or an attachment to a case a notification mail is automatically sent, with the direct link to the portal.



Checking a Case



Serial Numbers: Here you have the list of the serial numbers claimed, with the corresponding material code.

Case Comments Attachments **Serial Numbers** Repairs Details

SERIAL NUMBER ▾	MATERIAL CODE ▾
B6201604902	JB00004508
B6201604901	JB00004508
B6201604900	JB00004508

Repairs Details: In case the units are sent back to Bonfiglioli for repair, in this section you will find the status of the material. Only available for Italian and Indian repair centre at the moment

Case Comments Attachments Serial Numbers **Repairs Details**

DELIVERY DOCUMENT NUMBER ▾	QUANTITY ▾	STATUS ▾
2206003972	3	Shipped

A notification mail is automatically sent when the parts are received in Bonfiglioli and shipped back to the customer, with reference to the delivery document number.

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