QuincyHQ.com

Distributor Reference Guide

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WHAT IS QUINCYHQ?

QuincyHQ is the headquarters for everything Quincy Compressor. It replaces Q-SERV and is found directly at www.QuincyHQ.com. The new site offers a convenient, easy-to-access "front door" to all Quincy's online tools. A single password allows access to the entire collection of systems for doing business with Quincy Compressor. Among the many benefits, users will see the following:

- **Improved Speeds**: The new site is built on a robust and dependable platform
- **Parts Orders Processed through Virtual Engineer:** Entering parts orders will transition from iStore directly into Virtual Engineer.
- **Message Central:** Communications and related information are all housed in one easy-to-remember location.
- **New Warranty Claims Application**: In the near future, warranty claims will be processed through an upgraded system called DisWAnt.

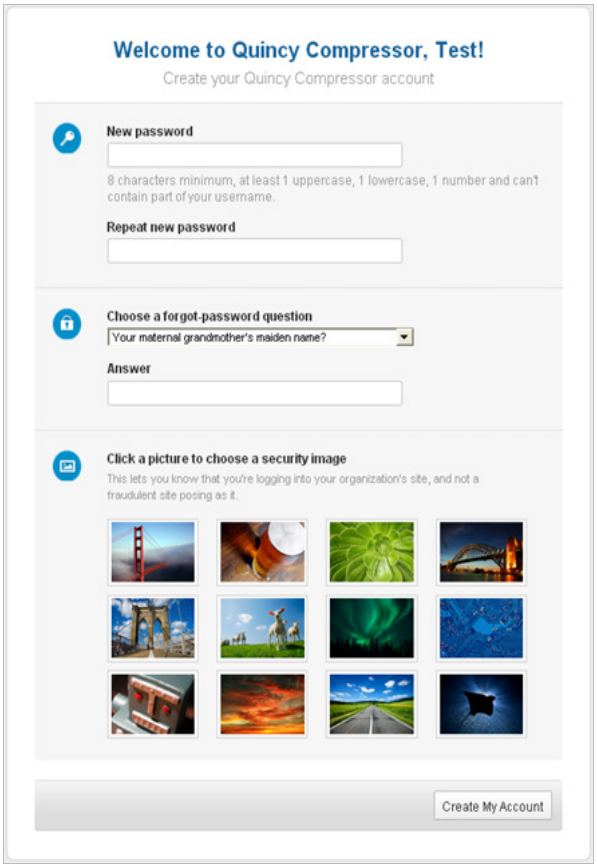
ACCOUNT ADMINISTRATION TOOLS

1. REGISTRATION PROCESS

To create an account within QuincyHQ, email customerservice@quincycompressor.com and ensure you provide your full name, company email address and branch location(s) for which access is needed.

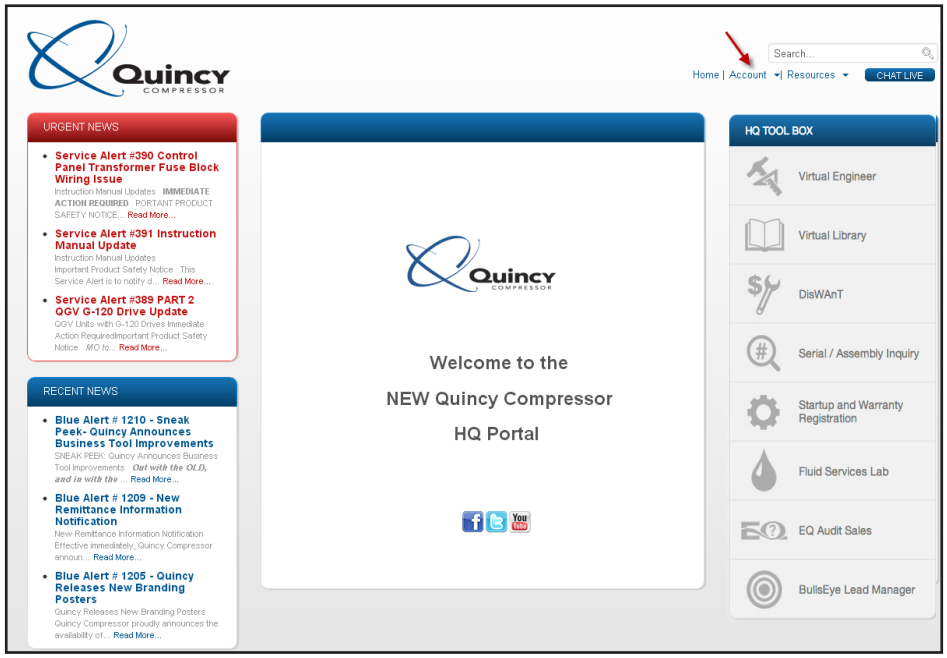
2. ACTIVATION PROCESS

After Quincy Compressor creates your distributor account, you will receive an email from "**Okta" <noreply@okta.com>** which is Quincy's identity/security provider. In this email there is a link to activate your account. Once you click on the link, the page shown to the right will be displayed. Follow instructions on the screen to activate your account; once completed, you will be directed to https://www.QuincyHQ.com
*The first time you login into QuincyHQ, there will be numerous important messages to read and accept.



3. PASSWORD CHANGE

To change your password, click edit account in the top right hand of the page under the Account tab. Follow the prompts found under the Change Password heading. Once you've entered your new password into the fields, click change password. These same instructions apply to changing your security image and security question.



SYSTEM TOUR

SYSTEM TOUR

- ***Urgent News*** - This section displays Blue Alerts and Service Alerts that Quincy Compressor deems URGENT. Examples of Urgent News are product recalls, price increase, system outages, etc. When an article is posted under Urgent News, you will be required to review the alert and acknowledge that you've read the alert before you will be able to continue.
- ***Recent News*** - Contains all other alerts and communications.
- ***Center Viewing Area*** - Content here will be updated periodically. All important notifications like product launches will be posted here as well as links to Quincy's social media pages.
- ***Account Menu*** -The tab on the right between Home and Resources allows you to reset your Okta password, edit your security image or security questions.
- ***Resources Menu***- Offers links to helpful calculators and Quincy Compressor Terms and Conditions from Quincy's public website, www.quincycompressor.com.
- ***Chat Live Button*** - Send an email to reach a Quincy Compressor customer service agent with questions or issues using this link.
- ***Search Box*** - Search through the alerts inventory quickly and easily. Find all alerts released after November 2012. For anything older, reference the Blue Alert section of Virtual Library.

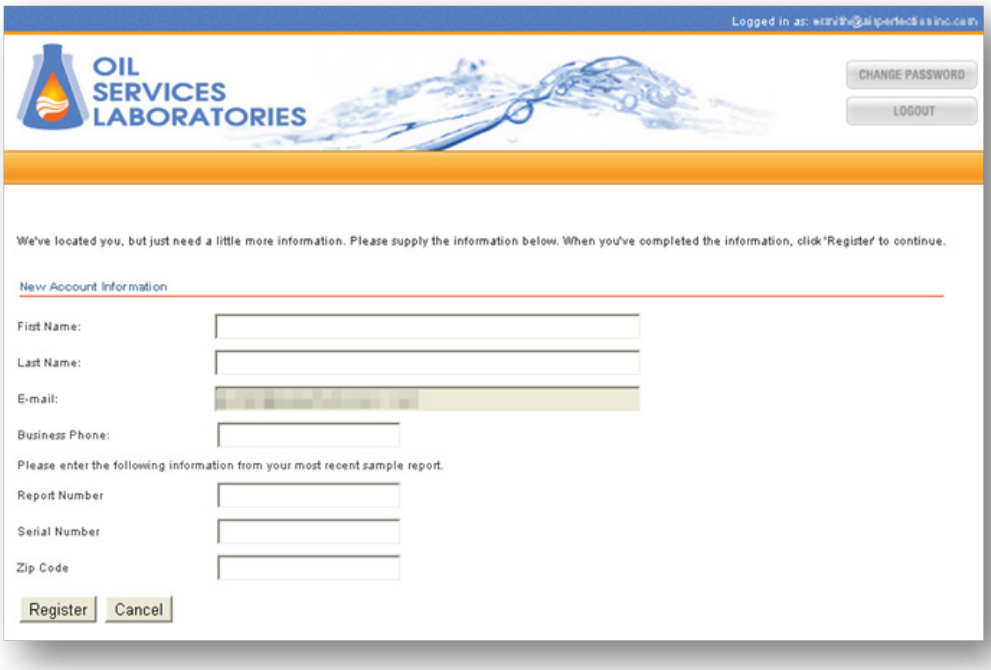
HQ TOOL BOX

Each link in the toolbox represents an important Quincy application. The descriptions below define their functions:

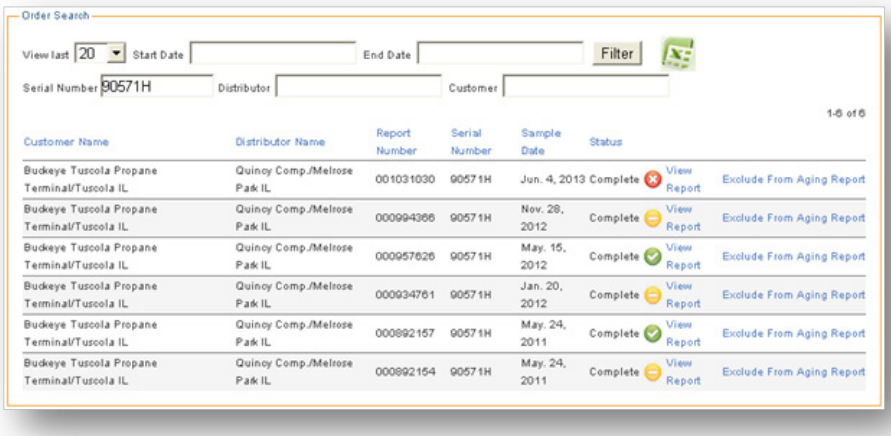
- ***Virtual Engineer*** - Quote, configure and ordering tool for all Quincy products including aftermarket. Parts are ordered within Virtual Engineer instead of Istore. Specific Virtual Engineer instructions can be found at
- ***Virtual Library -*** Quincy's web based repository for all marketing, sales and technical publications. The Virtual Library Users' Reference Guide can be found at: http://www.revbase.com/tt/sl.ashx?z=12b3cd59&dataid=486091&ft=1.
- ***Distributor WAnT (DisWAnT)*** - Quincy's tool to file warranty claims for reimbursement. The DisWAnT Reference Guide is available at .
- ***Serial/Assembly Inquiry -*** Quincy's search tool to obtain a breakdown of the materials used to build a particular Quincy compressor and to breakdown the assembly group numbers to find the appropriate part number.
- ***Startup and Warranty Registration*** - Allows for electronic entry of the commission forms, as well as warranty registrations, for various Quincy Compressor products. The Startup and Warranty Registration Reference Guide can be found at: http://www.revbase.com/tt/sl.ashx?z=12b3cd59&dataid=433388&ft=1.
- ***Fluid Services Lab -*** Easily find fluid samples and check analysis reports. Instructions located in the Fluid Services Lab Instructions section of this Guide (reference pg. 6).
- ***EQ Analysis*** - Access the Efficiency Quotient audit site to conduct analysis on logged system data.
- ***Bullseye Lead Manager*** - Portal for appointed distributor personnel to receive Quincy Compressor generated leads. Only distributors who are currently Lead Managers will be able to access this portal.

FLUID SERVICES LAB INSTRUCTIONS

Upon initial login to the Oil Services Lab, you will receive a prompt for additional information to finalize your account. Information from a recent sample report is required to ensure access to all historical samples. If you do not have a recent report with Report Number, Serial Number and zip code, please contact rotaryservice@quincycompressor.com.



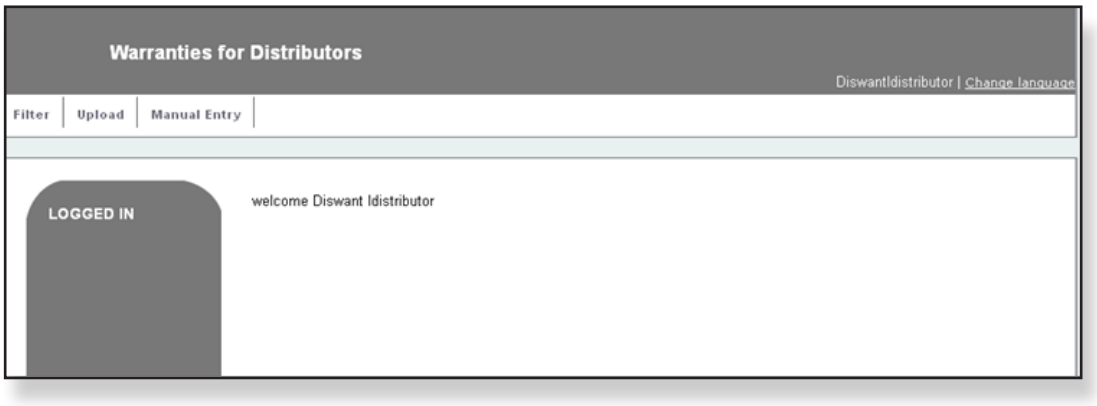
Once you have access to the Fluid Services Lab Tool, you can search for samples by serial number, end customer or sample dates. You can quickly identify if an action needs to be taken on a report by the traffic light symbols located next to the status row. To view the sample results, click "View Report" and a pdf of the results will be downloaded.



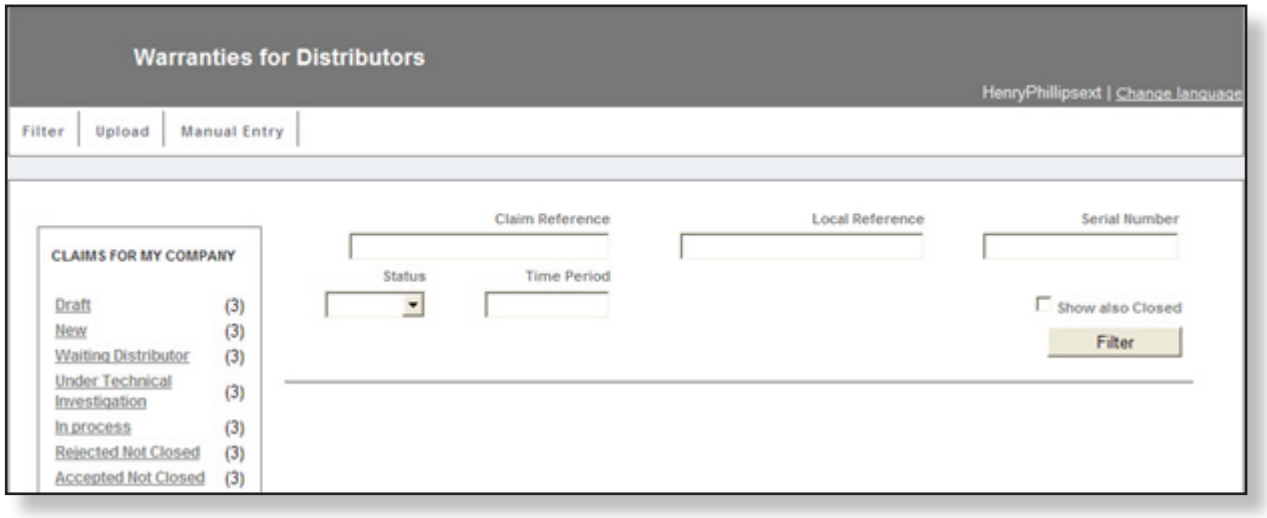
DisWAnT is the new, upgraded warranty claim entering process for Distributors. In this section, the following topics will be discussed:

- Filtering Entered Claims
- Manually Entering New Claims

When first signing into DisWAnT, the screen below will be shown. The change language link is currently not functioning. When available, this will change the titles only of the spaces to the selected language. Note - All fields must be entered in English.



FILTERING ENTERED CLAIMS

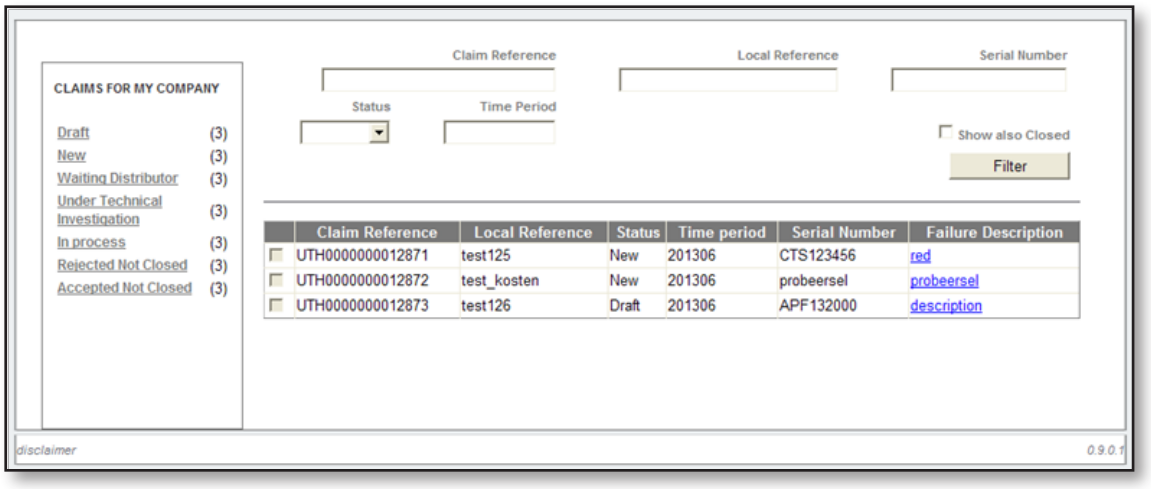


Filling in any of these boxes or multiple boxes, then hitting the filter button will generate a list of claim(s).

By clicking on the Filter Tab, you can sort through YOUR claims only. Claims for your company are found on the left side of the screen. DisWAnt terminology described below:

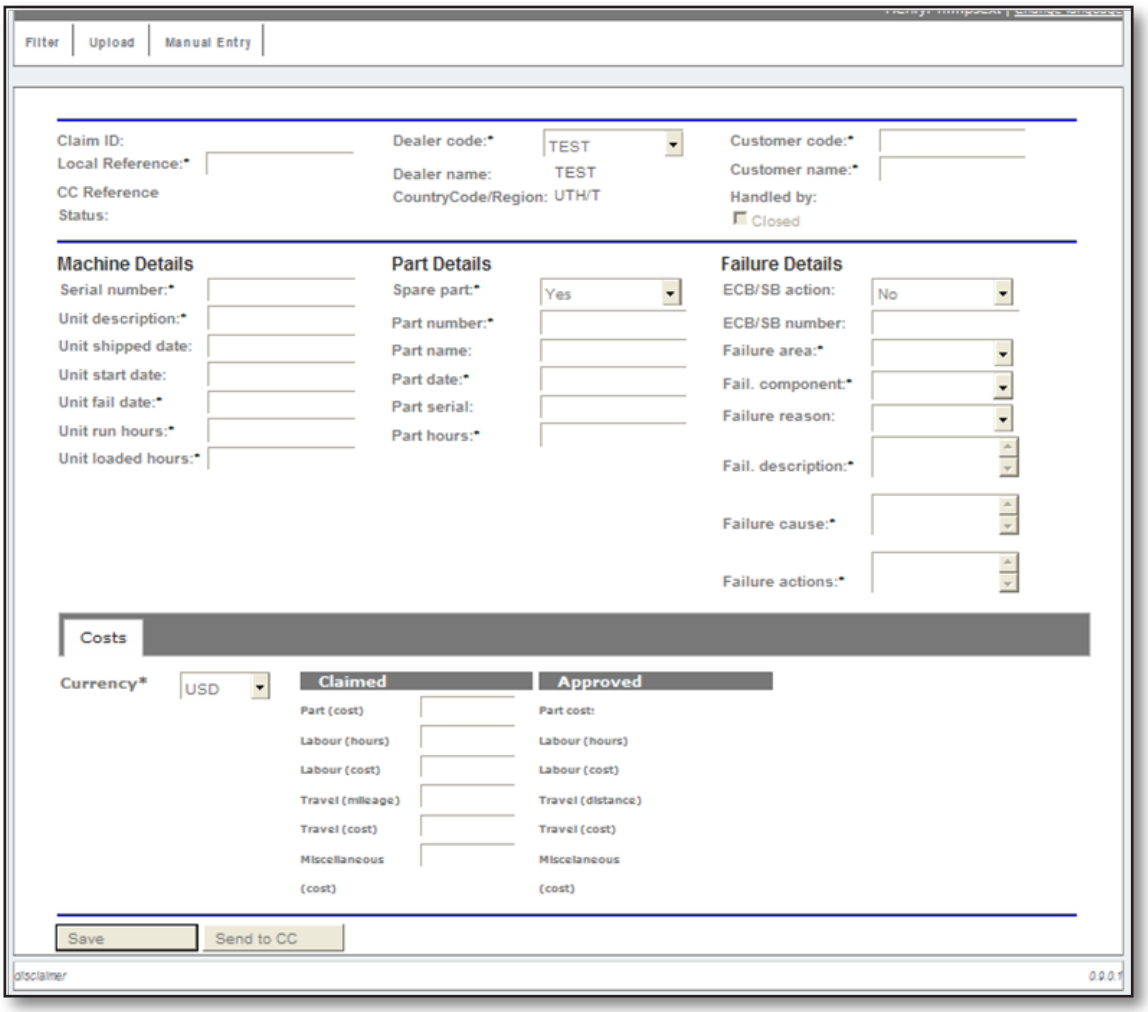
- Claim Reference - Warranty Claim Number (will auto-generate when submitted)
- Local Reference - Job Ticket Number
- Serial Number - Unit Serial Number
- Status -
  - Draft - Claims that are started but not finished or submitted for reimbursement
  - New - Claims submitted for reimbursement but have not been processed
  - Waiting Distributor - Claims that have been sent back from Quincy Compressor to the distributor asking questions for additional information or clarification
  - Under Technical Investigation - Claims that are waiting for additional information such as waiting for a response or having parts evaluated
  - In Process - Claim is in process of review
  - Rejected - Claim was rejected
  - Accepted - Claim was approved
- Time Period - Used to sort by date (yyyymm)

Click on any of the options and a list of claims in that category will appear. The claim can be opened by clicking the blue underlined word found under the “Failure description” heading.



MANUALLY ENTERING CLAIMS

To enter a new claim, click the Manual Entry tab. The following screen will be shown. Enter the information for each field that is required. The tab key can be used to move to the next open field in a downward motion. A hard copy form for distributor service techs to fill out and provide to their inside staff is available on Virtual Library.



Required Fields:

- Local Reference - Job Ticket Number
- Dealer Code - Quincy Compressor distributor number will auto populate (Distributor Information)
- Customer Code - Distributor assigned number to customer
- Customer Name - End User Company Name
- Serial Number - Unit Serial Number
- Unit Description - The description will auto-populate once a unit serial number is entered in the serial number field.

- Unit Ship Date - Will Auto Populate (format dd/mm/yyyy)
- Unit Start Date - Will Auto Populate for a registered serial number using startup information (format dd/mm/yyyy)
- Unit Fail Date - Service Date (format dd/mm/yyyy)
- Unit Run Hours - Hour meter reading
- Unit Loaded Hours - Loaded Hours on a unit
- Spare Part (Yes or No) - If original part on the unit, answer No. If part was previously replaced on the unit, answer Yes.
- Part Number - Part number of the main failing component
- Part Name - Enter description of part
- Part Date - Unit start date unless previously replaced, then replacement date (format dd/mm/yyyy)
- Part Serial - Enter the manufacturer's component serial number (motor, cooler, VFD, etc.)
- Part Hours - If the original part, use the unit hour meter reading otherwise; enter hours since component was replaced
- ECB/SB Action (Yes or No) - If the service action was due to a Service Alert (ECB/SB), enter Yes, if component failure, enter No- Note: ECB = Engineering Change Bulletin, SB = Service Bulletin
- ECB/SB Number - Enter Service Alert (ECB/SB) number
- Failure Area - A general description of the failing component location (use drop down box)
- Failure Reason - Why the component failed (use drop down box)
- Failure Component - Main failing component description
- Failure Description - Text field to explain what failed
- Failure Cause - Text field to explain the reason of the failure
- Failure Action - Text field to explain what service action was done to service the unit

After the claim form is completed hit the "save" button. Once saved, the costs, parts used, comments, attachments, Q&A and part return tabs will be available. The next section covers these additional tabs.

COSTS TAB

- Currency - Default will be in $USD (United States Dollars)
- Part (cost) - Will auto-populate based on your purchase price of the part(s). This will be filled in on the "Parts Used" tab
- Labour (hours) - Fill in the labor time (hours) used on the service call
- Labour (cost) - Will auto-populate based on the preset labor allowance
- Travel (time) - Fill in the travel time (hours) used on the service call
- Travel (cost) - Will auto-populate based on the preset labor allowance
- Travel (mileage) - Fill in the miles traveled for the service call
- Travel (cost) - Will auto populate based on the preset mileage allowance
- Miscellaneous (cost) - Fill in any misc. cost involved (must be explained in the comments section) such as any 3rd party costs

PARTS USED TAB

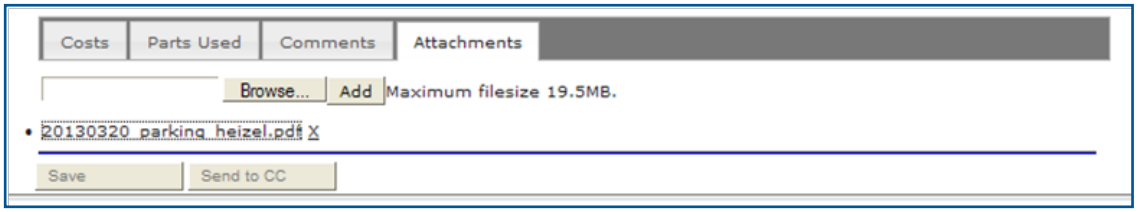
- Part Number - Enter part number of part used for service work on a claim
- Quantity - Enter quantity of the part number entered on this claim that was used for service work

Click the "Add" button. Repeat steps above to enter all parts. If a part number is entered incorrectly or not used for this claim, hit the "Delete" button to remove from the claim.

COMMENTS TAB

View comments made by Quincy Compressor regarding the claim

ATTACHMENTS TAB

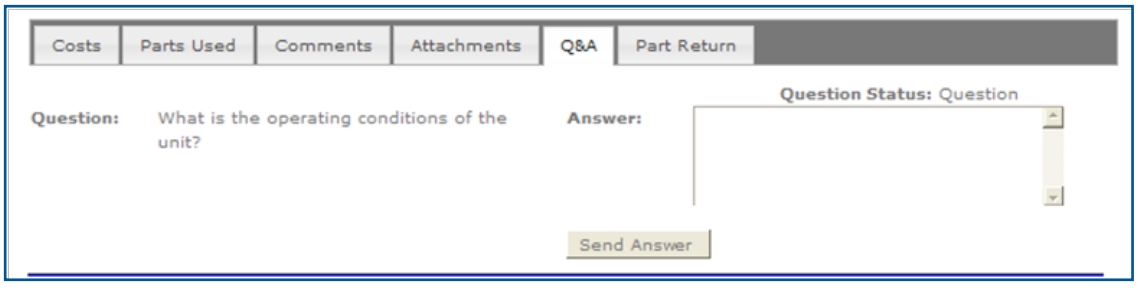


On the attachments tab, photos, scanned copies of 3rd party invoices, etc. can be added. The browse button must be used first to add the attachments. Dragging and dropping files are not permitted. Once the file is shown in the box, click the "Add" button. Repeat for multiple attachments.

Attachments can also be removed by hitting the X next to the files name.

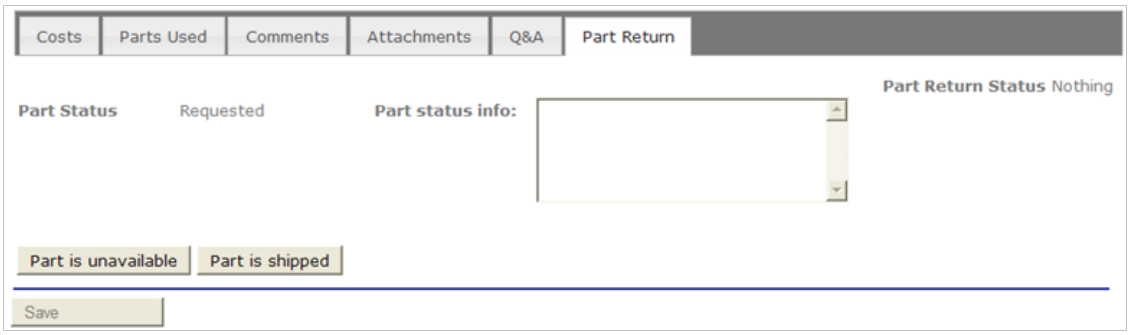
Once all the information is entered, click "Send to CC". This will send the claim to Quincy Compressor. The claim will not be available for editing unless when processed by Quincy Compressor and sent back to the distributor for additional information.

Q&A TAB



This area is used if a claim is sent back to the distributor requesting additional information or clarification. Distributors must check this area to review the claims that are in waiting. Distributors must fill in the answer in the answer box then click "Send Answer" This will send the claim back to Quincy Compressor resulting in a "In Process" status.

PARTS RETURN TAB



This is also a place to check if the claim was put back into “Waiting Distributor” status.

If the part was requested to be returned to the factory or supplier for evaluation, fill in the box above with shipping information such as tracking number and carrier.

Click “Parts Is Unavailable” or “Part is shipped”. If the part is unavailable, the Part Status Info text field must explain why the part is no longer available.

The person that created the original claim will receive an e-mail if a claim is sent back to the distributor for any reason such as being asked a question or replying with an RMA.

TROUBLESHOOTING COMMON ISSUES

Forgot Your Password?

Navigate to https://www.QuincyHQ.com and select the “Forgot Password?” link. Simply fill in your email address and hit “Send Email”. This will send an email with a link to enable you to change your password. Note that you will have to answer the security question you created when you first setup your account. If you still have issues, please email customerservice@quincycompressor.com.

Browser Related Issues

QuincyHQ is only supported by Internet Explorer 8 or higher, Chrome or Firefox. If your browser does not meet these requirements, you will receive the warning message below. Installing Chrome or Firefox is quick, free and simple; just follow the instructions on each browser’s respective web pages. If you need additional assistance with installing a compatible browser, please work with your local IT department.

701 North Dobson Avenue | Bay Minette, AL 36507 | Phone 217.222.7700 | Fax 251.937.7182 | Email: customerservice@quincycompressor.com

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