



**POWER SOLUTIONS
INTERNATIONAL**

PSI WARRANTY PORTAL USER GUIDE

April 2024

POWERING FORWARD

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Preface

The PSI Warranty system is power by Mize software, in some cases we refer to the system as the “Mize” system. The PSI Warranty system and Mize system are one in the same.

The warranty system works best when using Google Chrome Internet Browser. The link below will allow you to download Google Chrome to your computer.

<https://www.google.com/chrome/>

Warranty Training Video

A supplemental training video is available for download by selecting the link below.

[Click here for warranty system training video](#)

Accessing the PSI Warranty System

To access the PSI Warranty system, you will follow the link provided to you from your PSI Warranty contact. The link below will allow you to access to the login screen if one was not provided to you.

<https://psiengines.mizecx.com/login.html>

Credentials will be provided to you by your PSI warranty representative.

Password policy

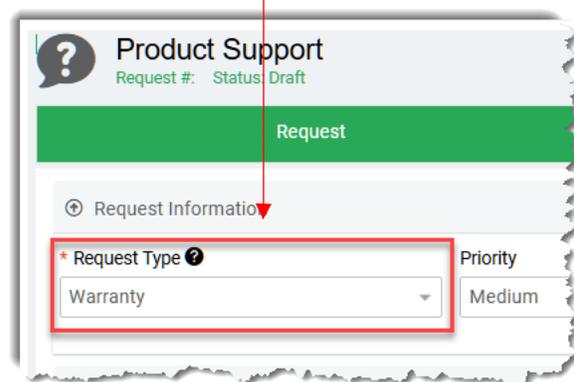
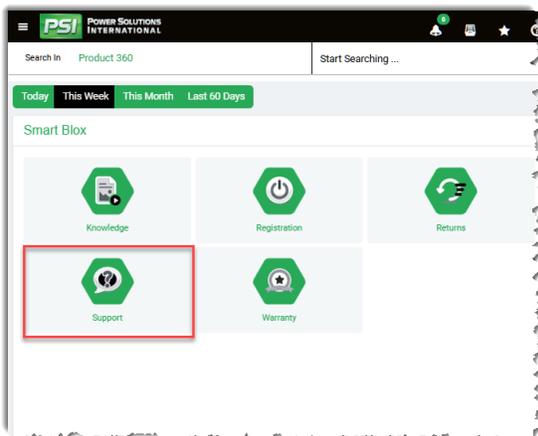
You will need to reset your password upon your first login attempt. Your password will require a reset every 45 days. In the event you forget your password you can use the forgot password link found at the login screen.

- Minimum password length 12
- Maximum password length 16
- At least one uppercase letter
- At least one lowercase letter
- At least one non-alphanumeric character
- Allowed special characters include !,*,@,#,\$,%^,&,'?
- Passwords are set to expire after 45 days
- Password reuse is not allowed (system will remember the last 10 passwords)
- Password lockout will occur after 5 failed login attempts

System Support

In the event you have a question or need support while using the PSI warranty system please submit a WARRANTY support request ticket using the SUPPORT section of the portal. PSI Warranty department will review your support request as soon as possible.

- 1) Navigate to the Support Icon on the home screen
- 2) Select **“New”**
- 3) Select Request type **“Warranty”** from the drop down menu



Claim Status Definitions

- **Draft**Claim is in process, not yet submitted to PSI
- **Pending**.....Claim is submitted to PSI and is pending review
- **Pending – Information**.....Claim has been reviewed by PSI and requires additional information
- **Pending – Part Return**.....RMA has been issued to you for part return to PSI
- **Pending – Part Review**.....RMA has been received by PSI and part is under review
- **Approved**.....Claim has been approved by PSI
- **Approved – DOA**.....Claim has been approved by PSI and is in process of further approval
- **Approved – Payment in Process**.....Claim has been submitted to PSI Accounting for payment
- **Paid**.....Claim has been paid
- **Denied**.....Claim has been denied

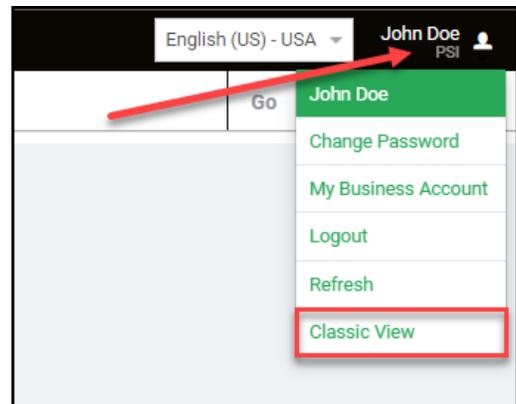
Portal Home Screen

There are two home screen views available

- **Dashboard view (default)**
- **Classic View**

To change between views, select your name in the upper right corner and toggle between classic View & dashboard view.

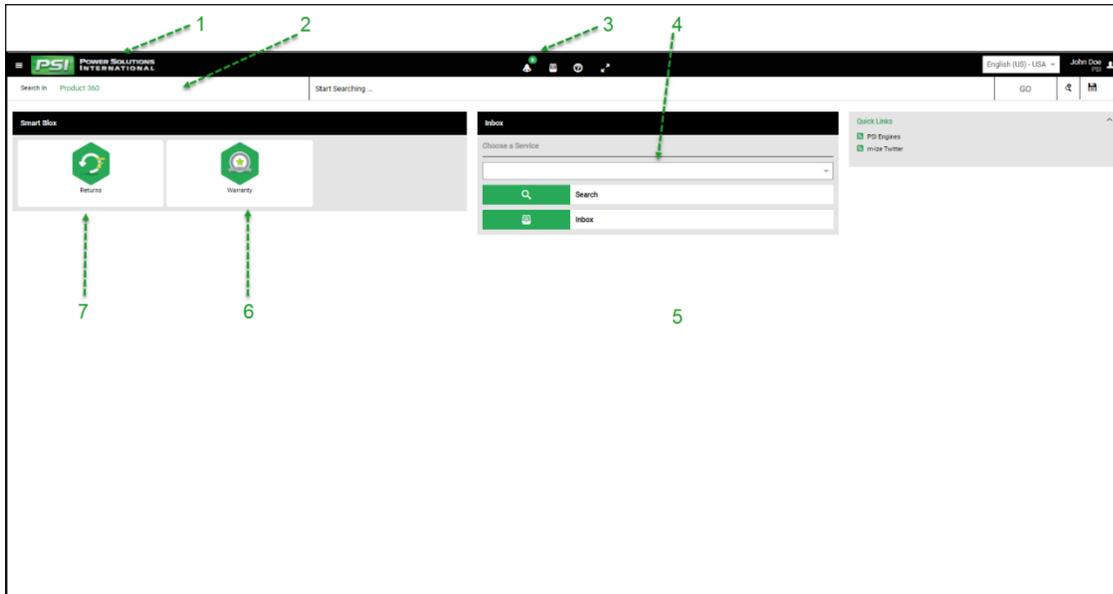
Dashboard view allows you to add custom panels to the home screen. Panels can be created by creating a saved search and checking the “Create panel” check box.



Home Screen (Classic View)

The numbers and corresponding descriptions will provide you a general overview of the home screen features.

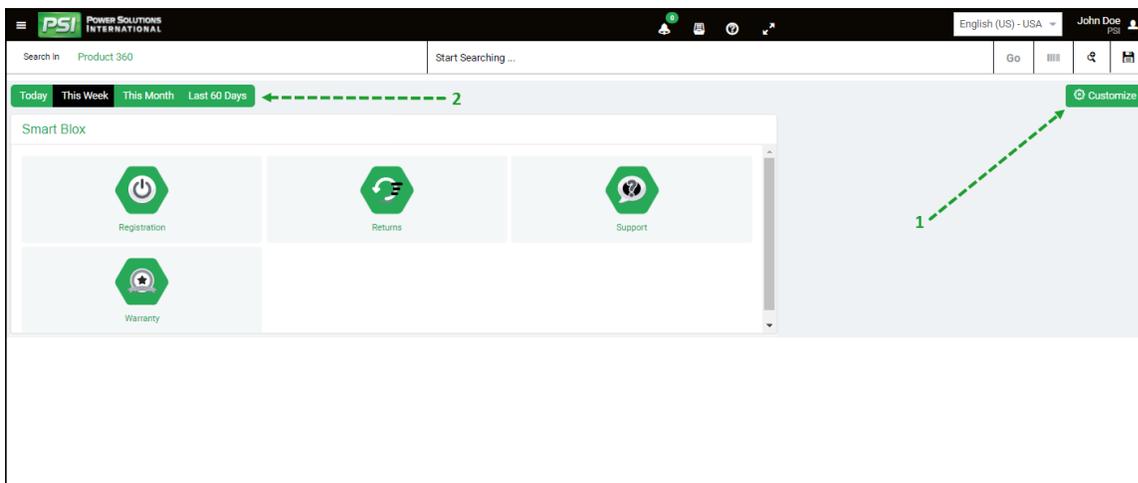
1. Navigate back to home page
2. Search option drop down box
3. Alert Bell for notifications
4. Work Queue Inbox
5. Warranty Section
6. Returns Section
7. Returns Section



Dashboard View

The dashboard can be customized by adding panels, select the customize (1) button to add panels to your dashboard.

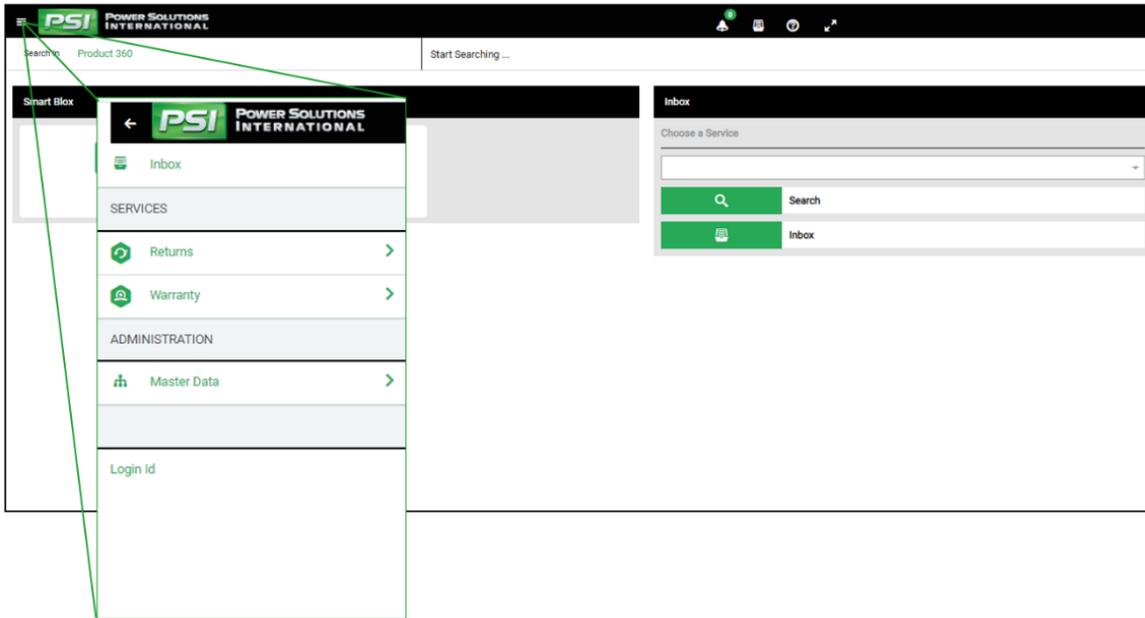
Panels which show case files, warranty claims, or RMA's will be filtered by the filter timeline (2) in the top left corner of the screen.



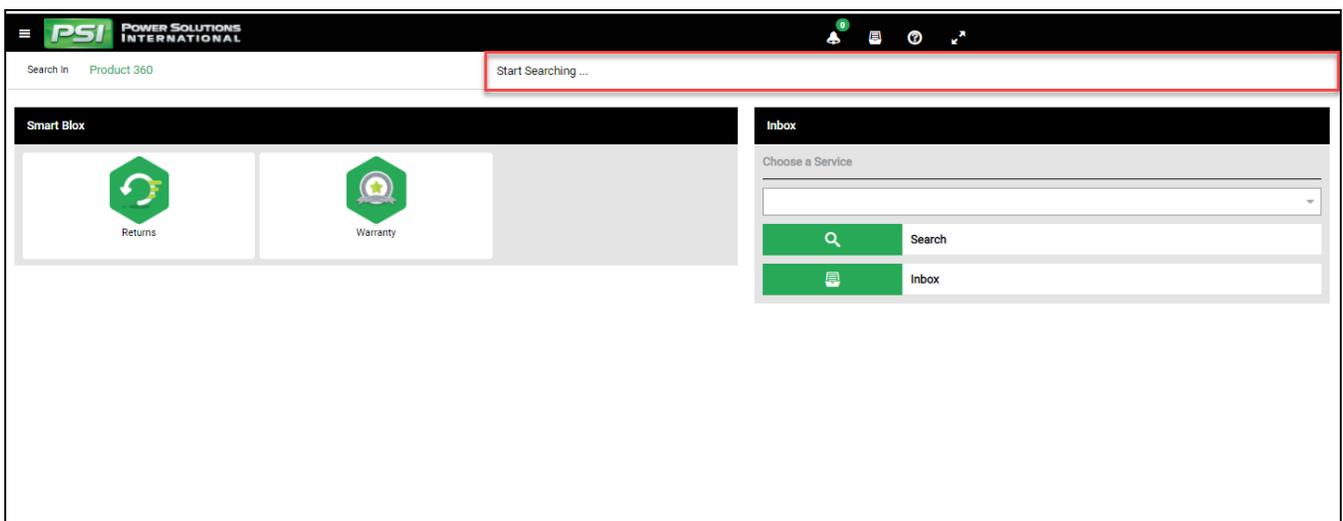
Navigation and Searching

You can navigate through the system using multiple methods within the system.

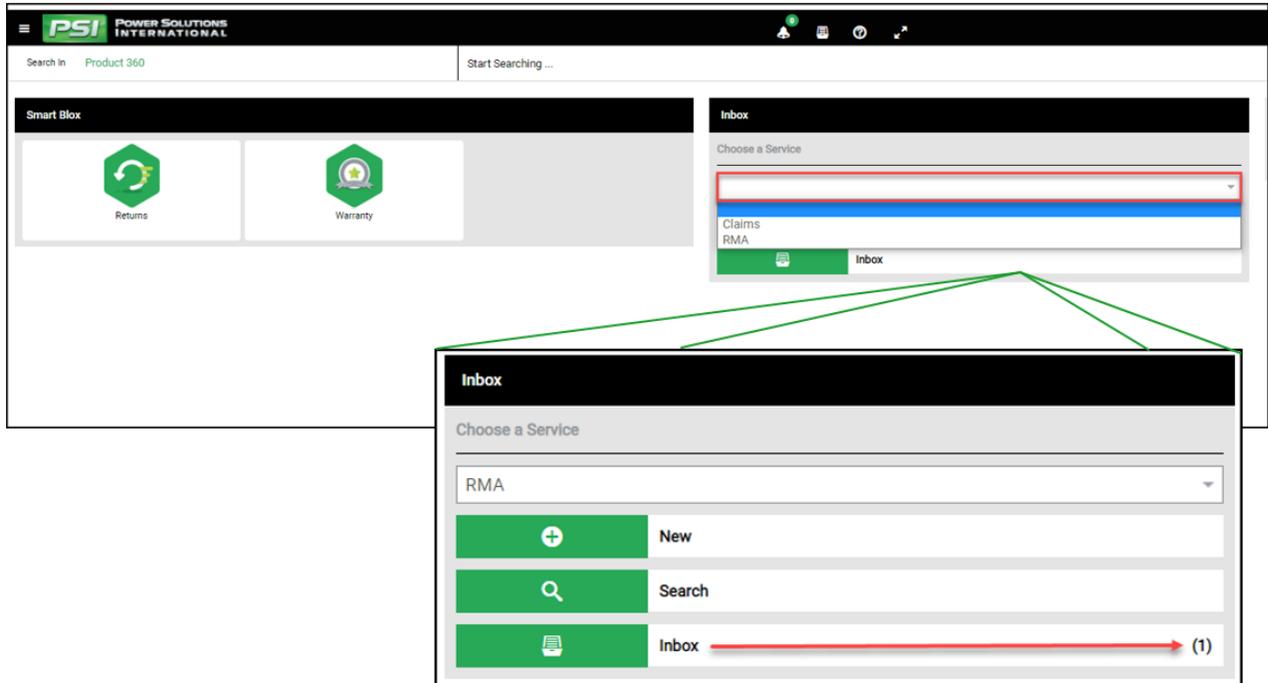
1. Search panel on the left side of screen by selecting the three horizontal bars at the top left of page
 - a. Option to search Returns (RMA)
 - b. Option to search Warranty



2. Another method of searching is using the Search bar at the top of the page
 - a. Change the drop-down option next to "search in" to alternate between warranty and RMA search function
 - b. To Enhance a search in the search bar, use double quotes (") before and after the word or number you are searching for. **Example = "Water Pump"**



3. Inbox Search is used to easily identify claims or RMA's that are assigned to you that you will need to act on.
 - a. To access your inbox, change the drop-down box in the home screen to Claims or RMA.
 - b. If you have claims or RMA's in your inbox you will see a number appear in the Inbox row



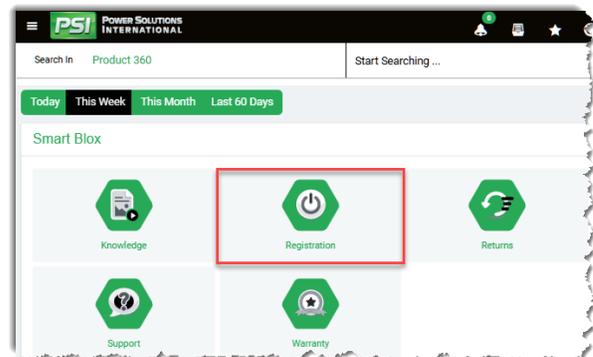
Warranty Registration

You will only see engines in the registration section if your company purchased the engine DIRECTLY from PSI. If you do not see the engine in the registration section and you need to update the in-service date (warranty start date), you will need to use the public site at www.psiengines.com/service.

Make sure to LOG OUT of the credential based system before accessing the link above.

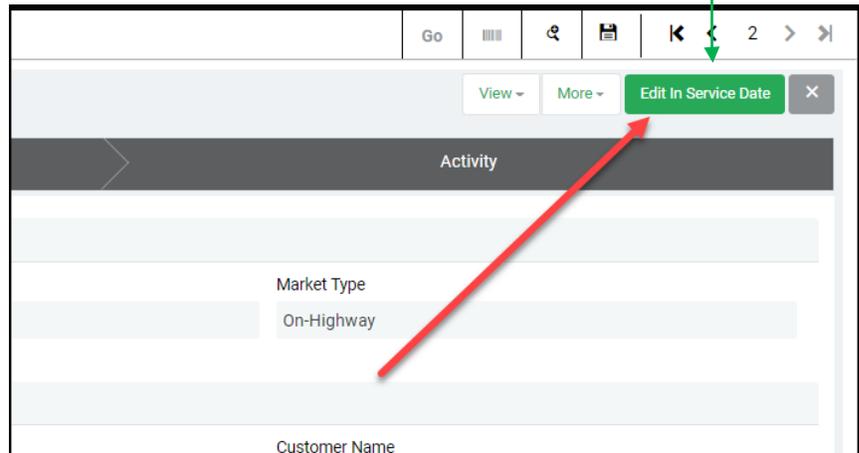
Watch this video to learn more about this process – [Click Here](#)

If your company was the original purchaser of the engine, follow the steps below to update the in-service date using the registration section in the portal.



How to update the In-Service Date

1. Navigate to the Registration Icon
2. Search for the engine serial number
3. Select the "Edit In-Service Date" button
4. Update In-Service Date
5. Press Submit



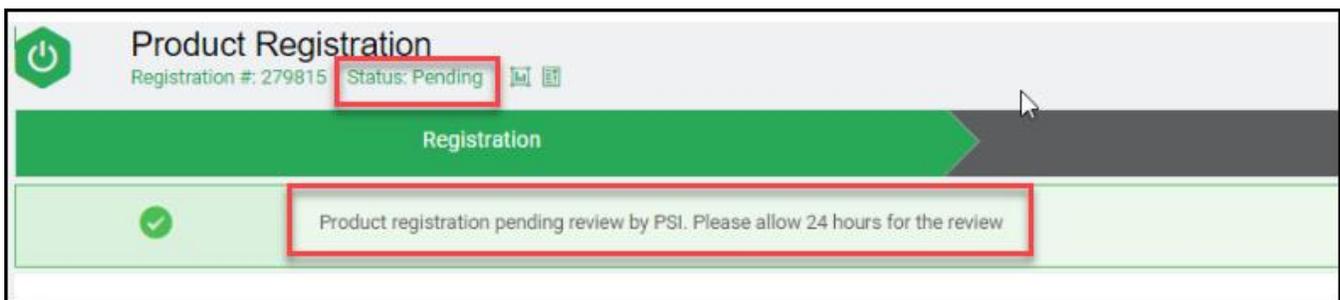
Registration FAQ's

I do not see the edit in-service date button?

If you do not see the "Edit In Service Date" Button that means the in-service date is already updated. This is likely because the engine already has a prior warranty claim on it in which PSI updated the in-service date on your behalf.

I updated the registration in-service date, and the registration is now pending?

If the PSI engine sale date is greater than 1 year from in-service date the registration will go into a pending status. PSI will review the request and reply within 24 hours.



How to Start a New Warranty Claim

1. Ensure engine registration is updated with valid in service date (see section above for process).
2. To enter a warranty claim you will navigate to the Warranty Icon.



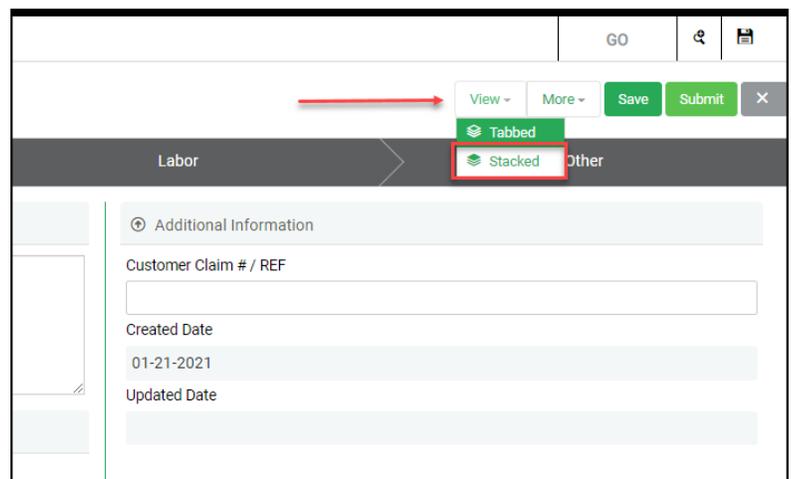
3. Select New



Warranty Claim Overview

Once you are into the claim form you will notice the claim is separated into sections. You can navigate through the different sections of the claim at any point during the claim input process. If you prefer to change your view from a tabbed view to a stacked view, you can select “stacked” option in the view drop down.

- Claim
- Service
- Parts
- Labor
- Other



You should familiarize yourself with each tab of the claim screen to understand the functions. Some fields will be automatically populated based on your login credentials.

Review the pages below to understand each of the fields.

Claim Tab

- **Location #** - This is your companies assigned ID number in the warranty system
- **Contact** – This should contain your information. If you are not available when you search, add your information by selected the **+**
- **Comments** – This section is available for you to leave comments or notes if needed.
- **Attachments** - Use this feature to add attachments to your claim. PDFs, pictures, repair information, videos, etc.
- **Customer Claim #/ Ref** – Fill in your claim number or reference number that you want to use to track the claim.

The screenshot shows the 'Claim' tab interface. At the top, there are navigation tabs for 'Claim', 'Service', 'Parts', 'Labor', and 'Other'. The 'Claim' tab is active. Below the tabs, there are three main sections:

- Requestor Information:** Includes fields for Location Type, Dealer, Location # (with a search icon), Name (filled with 'John Doe Machinery'), Contact (with a search icon and a plus sign), and a checkbox for 'Servicer same as Requestor'.
- Comments:** A large text area for entering notes, with an 'Attachments' section below it containing a 'Find Attachment' button and instructions to 'Drag and drop files here'.
- Additional Information:** Includes fields for 'Customer Claim # / REF', 'Created Date' (01-21-2021), and 'Updated Date'.

Service Tab

The Service section will contain most of the claim data. See below for helpful information for each section.

Service Information

Enter information on the repair location and repair date. If the claim is a parts warranty you will select Parts Warranty from the drop-down box under Service type

The screenshot shows the 'Service Information' form. It contains the following fields:

- Service Request #:** Input field with value '1'.
- Service Type:** Drop-down menu with 'Warranty' selected.
- Repair Date:** Input field.
- Repair Site Type:** Drop-down menu with 'In-Shop' selected.
- Repair Site Name:** Input field.
- Address Line 1, 2, 3:** Input fields.
- City, ZIP Code, Country, State/Province:** Input fields.

Product Information

Enter the valid PSI engine serial number and press the tab button. The Engine part number will automatically populate. Enter your machine serial number or VIN number for tracking purposes. Enter the usage in hours or miles depending on your application.

Note: An invalid engine serial number will cause a **RED** hard error. You will not be allowed to submit a claim with a hard error. If you believe the engine serial is valid and there is an error in the system, contact your PSI Warranty representative for support.

The screenshot shows the 'Product Information' form. It contains the following fields:

- Engine Serial #:** Input field with a green checkmark.
- Engine Part #:** Input field with a green checkmark.
- Engine Part # Description:** Input field.
- Machine Serial # / VIN:** Input field.
- Usage:** Input field.
- UOM:** Drop-down menu with 'Hours' selected.
- In Service Date:** Input field.

Customer Information

Enter the end user or customer information in this section.

Customer Information			
Name	Street Address	City	State
Country	Postal/Zip Code	Contact Name	Contact Phone #

Coverage Information

Every engine is assigned warranty policies based on the specific engine serial number. The coverage will automatically populate in this field. Some engines have more than one policy assigned if the correct policy is not showing use the magnifying glass to select another available policy. Only policies that are valid and not expired will show in the search function.

Coverage Information				
Coverage #	Name	Status	Expiration Date	
Usage From	Usage To	UOM	Policy #	Name

Coverage Not Populating

There are multiple reasons why coverage may not automatically populate. See below for possible causes.

- 1) Engine is out of warranty. In this case, there is no coverage because it is out of warranty. If you believe this is an error the first step is to check the in-service date showing in the in-service date field. If the ISD is incorrect, it is possible the engine was not registered and needs to be updated.
 - a. Follow the steps above to update the in-service date. Once updated, go back to the claim and remove the serial number completely from the field and reenter the serial number.
- 2) Repair date is BEFORE the in-service date. No coverage will populate if the repair date is before the in-service date. In this situation you need to check the in-service date to see if it is accurate. If not, Follow the steps above to update the in-service date.
 - a. If the claim is an "OEM Factory" claim which occurred at the OEM factory prior to the unit going into service, make sure you select "FACTORY" as the service type in the "Service Type" drop down menu.

Causal Part Information

You will enter the causal part # into the field and press the tab button. A valid PSI part number is required to submit the claim. If the causal part number is not valid you will see a RED Hard error which will not let you proceed to submit the claim.

Tips on causal part numbers

PSI Part numbers are typically either **8 digits** OR the **letter "Z" + 6 digits**

Example – 12345678

Example – z123456

If the causal part has a part serial number associated with it enter it in the serial # field.

Causal Part Information		
Causal Part Type	Causal Part #	Serial #
Standard	<input type="text"/>	<input type="text"/>

Failure Information

Fill out the complaint, cause, and correction boxes completely and accurately. Include complete information including diagnostic steps, trouble codes, and test results.

If the engine has failed and is being replaced with a new engine, please provide the NEW engine serial number in the corrective action description box.

Failure Information	
Complaint Description	<input type="text"/>
Cause Description	<input type="text"/>
Corrective Action Description	<input type="text"/>

Labor Tab

The labor tab will allow you to enter your labor time requested. It is important to understand the drop-down options under Type.

- **Labor with SRT**.....This option will allow you to select from related labor times. The allowable labor SRT will populate under the “SRT (Hours)” section to provide you the allowable labor time.
- **Labor no SRT**.....If there is no SRT for the labor you are claiming you will select this field and type in the labor operation manually
- **Diagnostics**.....This can be used if certain diagnostic SRTs are used in the claim
- **Product Update**..... SRT for a product update related to your claim this option will be available.
- **Maintenance**..... SRT for a maintenance related labor operation

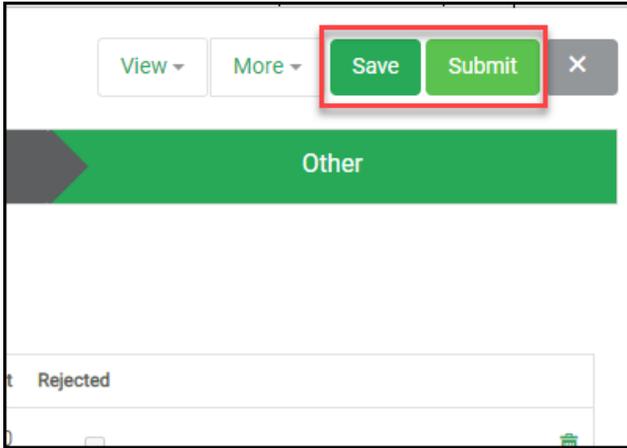
Enter your hours spent for each labor operation and the hourly rate you are claiming. If you need to add additional rows use the button at the right side. + Add Rows

Other Tab

Enter items you are claiming that are not parts or labor related. The drop-down options under Type can be changed to the specific item you are claiming. Enter the name or description into the field.

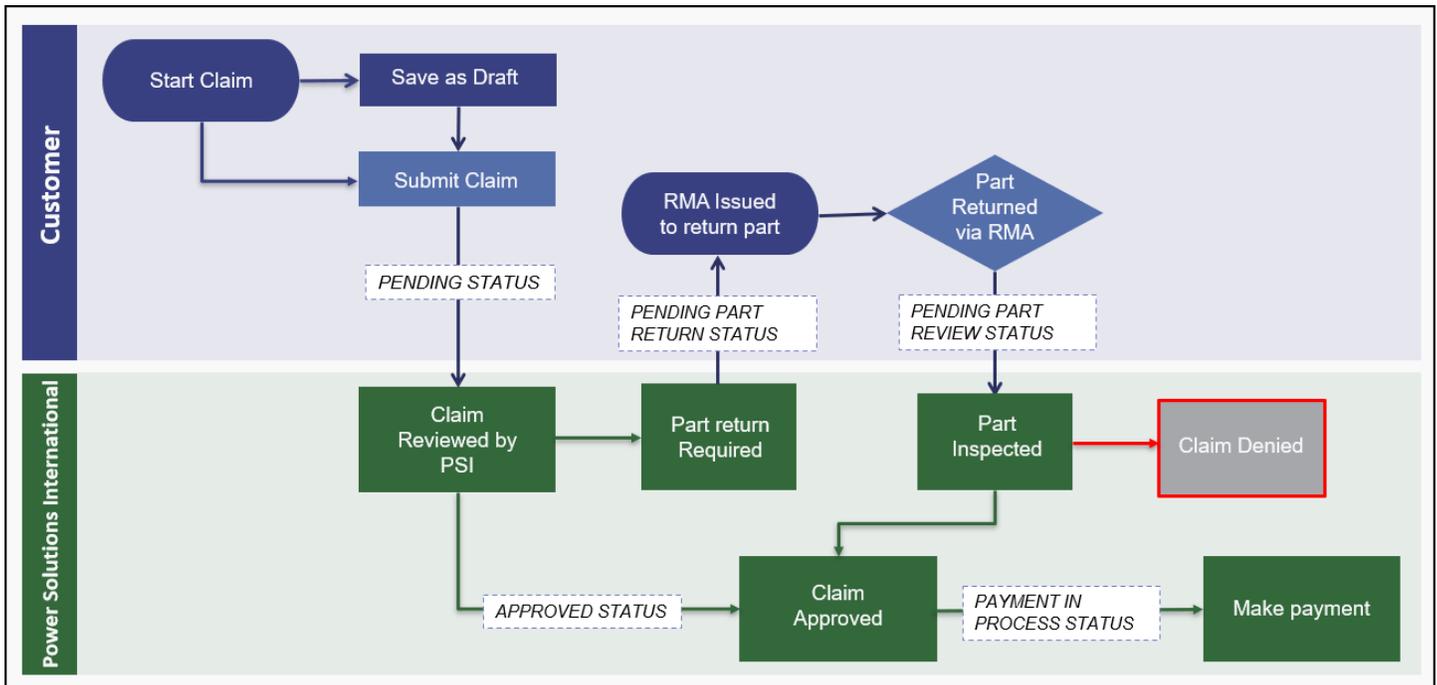
Saving or Submitting a Claim

You have the option to either save the claim or submit the claim. If the claim is new and you select SAVE it will create a claim number and the status will be DRAFT. This means the claim is not yet submitted to PSI. PSI will not act on a draft claim as it has not yet been submitted. If you select the Submit button the claim will be submitted to PSI and the status will change to pending.



Understanding Warranty Claim Workflow

The chart below shows you the workflow's that are possible within the PSI Warranty system.



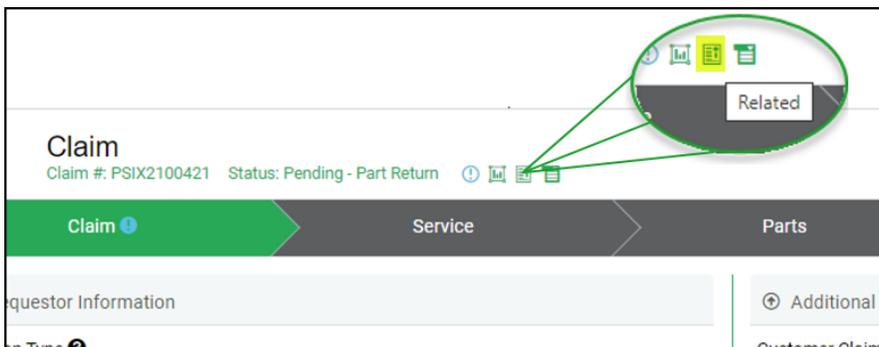
Understanding Warranty Claim vs. RMA

The PSI warranty system will use both a unique warranty claim number and RMA number. When a part is requested to be returned to PSI an RMA will be issued, you will return the part to PSI using the supplied RMA within the warranty system.

The warranty claim number and RMA will use similar numbers but will have different prefixes to the number. See below for an example.

Warranty Claim Number: PSIX2100421
RMA Number: RMA2100421-1

A claim number and RMA number which appear in the system like the above example are called "Related entities". This means they are related together. The RMA is specifically related to the warranty claim. While in the warranty claim screen you can navigate between related entities by clicking the Related button next to the status at the top of the page.

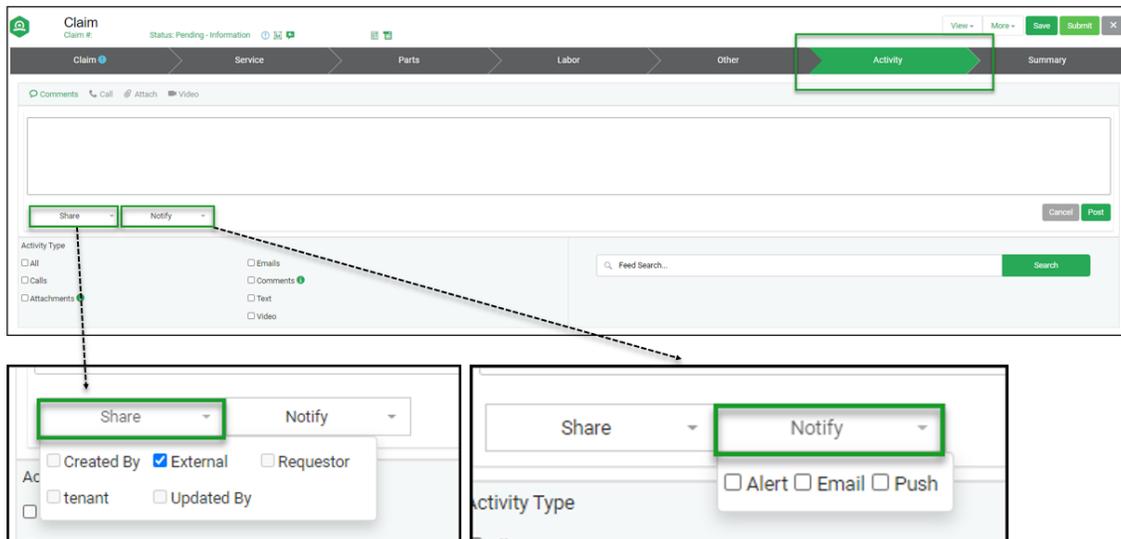


Understanding the Activity Tab

The activity section is your communication tool with PSI Warranty department. You will also use this section to attach files if needed.

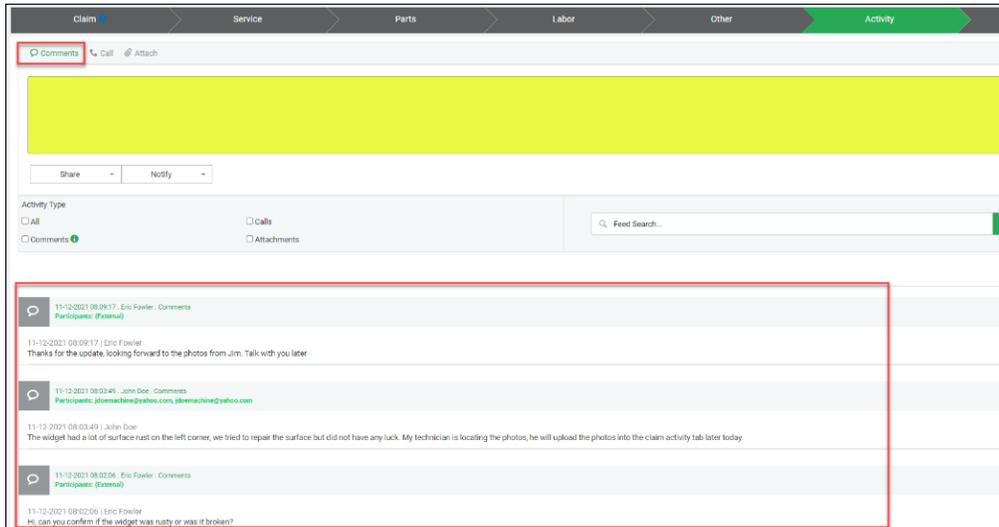
The "Share" drop down box will allow you to share the comment with PSI if needed.

The "Notify" drop down box will allow you to notify PSI with an alert or email if you check the applicable box



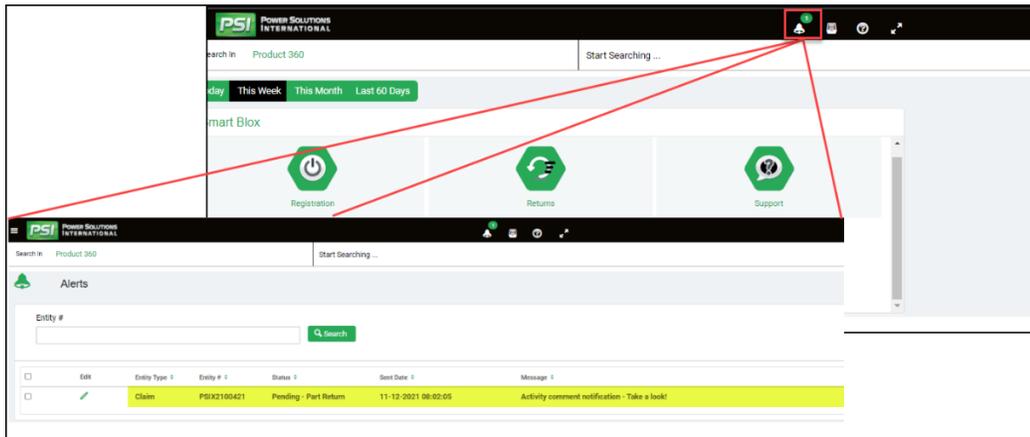
Activity Comments (Communication with PSI)

You can use activity comments to communicate with PSI. Using activity comments is always recommended as the history and communication is retained in the system and visible to both parties.



Alerts

At the top of your screen, you will see an alert bell. A number next to the alert bell indicates you have an alert that you should review. To access your alerts page, click on the alert bell.



Validation Errors

Validation errors can appear if there is missing information or wrong information entered into the claim. There are three types of validation errors.

RED Hard Error

This error will prevent you from submitting the claim and in some cases prevent you from saving the claim. You need to review the hard error and correct the issue.

YELLOW Soft Error

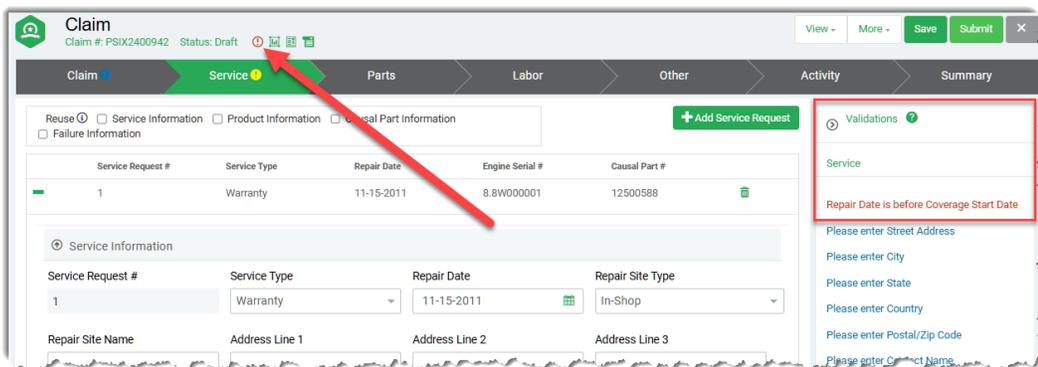
This error is a soft error that indicates there is missing information that you need to address. The yellow soft error will not prevent you from submitting the claim, however, if you submit a claim with a yellow soft error it is likely the PSI Warranty admin will return the claim back to you to update.

BLUE Soft Warning

This is a soft warning which highlights missing information in the claim. In some cases this information is not required and will not cause any issues. In other cases, the missing information may be required and the claim will be sent back to you.

To understand what errors are occurring and what they indicate, click on the error icon next to the "Status" and you will see the information appear on the right side of your screen.

Red (Hard Error) Example below



Blue (Soft Error) Example below

