

SolarWarranty Pro

Version 2.4.0

Training Manual

A hands-on course for new users

Published by Computer Aided Business Systems (Lagos, Nigeria)
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How to Use This Manual

This Training Manual is a hands-on course for new SolarWarranty Pro users. It is organised as a series of lessons, each building on the last. Work through them in order on a real (or test) installation. Each lesson ends with an exercise to practise what you have learned.

Allow roughly two hours to complete the full course. By the end you will be able to register warranties, process claims end to end, manage inventory, and run reports with confidence.

Set up a practice environment

Ask your administrator for a training login, or use a test installation, so you can practise freely without affecting live records. If you are practising on the live system, clearly label any test customers and products (for example, prefix names with “TEST”) so they are easy to find and remove later.

Lesson 1: Getting Oriented

Goal: sign in, understand the main window, and learn how roles shape what you see.

Signing in

1. Launch SolarWarranty Pro.
2. Enter your username and password.
3. If this is your first sign-in, set a new password when prompted (8+ characters, with an uppercase letter, lowercase letter, and a digit).

The dashboard

After signing in, the dashboard summarises the state of your business: products registered, open claims, fraud flags to review, pending manufacturer claims, low-stock alerts, and recovery received this month. Take a moment to find each figure.

Roles

What you can do depends on your role — Administrator, Manager, Staff, or Technician. If a menu described in this manual isn't visible to you, your role may not include it; that is normal.

Exercise

1. Sign in and change your password if prompted.
2. Identify each figure on the dashboard and note what it represents.
3. Open each top-level menu to see which features your role includes.

Lesson 2: Customers

Goal: add a customer and understand duplicate detection.

4. Go to Customers → New.
5. Enter a full name and phone number (for practice, use “TEST — Jane Doe” and a made-up number).
6. Save the record.

7. Try adding a second customer with the same phone number — notice the duplicate warning.

Exercise

1. Create a test customer with a full set of details.
2. Attempt a duplicate (same phone) and observe the warning.
3. Search for your customer by name and open their record.

Lesson 3: Manufacturers

Goal: add a manufacturer and see its automatic defaults.

8. Go to Manufacturers → New.
9. Enter a name (e.g. “TEST Solar Co”) and contact details.
10. Save. Note that default warranty periods and void reasons are created for you.
11. Open the manufacturer again and review those defaults.

Exercise

1. Create a test manufacturer.
2. Review the auto-created warranty periods and void reasons.
3. Mark it inactive, confirm it disappears from new-product dropdowns, then reactivate it.

Lesson 4: Registering a Warranty

Goal: register a product and find it again.

12. Go to Products → Register.
13. Enter a serial number (e.g. “TEST-INV-0001”) and choose the product type.
14. Select your test customer and test manufacturer.
15. Enter an installation date — watch the warranty expiry calculate automatically.
16. Save.

Try the case-insensitive search

After saving “TEST-INV-0001”, search for “test-inv-0001” in lower case. It still finds the product — serial matching ignores case.

Exercise

1. Register a test product end to end.
2. Find it via Products → Search using a different letter case.
3. Try registering the same serial again — observe the duplicate block.

Lesson 5: Processing a Claim

Goal: take a claim through its full lifecycle. This is the heart of the application.

Submit

17. Go to Claims → New, select your test product, and describe a fault.
18. Save — the claim gets a unique claim number and the warranty is checked.

Assign and inspect

19. Open the claim and assign a technician. The claim moves to Inspecting.
20. As that technician (or with their login), open My Inspections, record a diagnosis and fault category, and save. The claim moves to Pending Review.

Decide

21. As a manager or administrator, review the claim and approve or reject it, recording a resolution.
22. Close the claim when complete.

Exercise

1. Submit a test claim against your test product.
2. Assign a technician and record an inspection.
3. Approve the claim, then close it. Follow its status changes at each stage.

Lesson 6: Manufacturer Recovery

Goal: raise and track a recovery claim against a manufacturer.

23. From an approved claim, create a manufacturer claim.
24. Mark it submitted to represent sending it to the manufacturer.
25. Update it with an approved status, a compensation amount, and a payment date.
26. Check the dashboard — the recovery figure reflects your entry.

Exercise

1. Raise a manufacturer claim from your approved claim.
2. Record a compensation amount and payment date.
3. Confirm the dashboard recovery figure updates.

Lesson 7: Inventory

Goal: track replacement stock.

27. Open the Inventory module and create a stock line for a product type.
28. Issue a replacement and watch the stock count drop.
29. Log a faulty return, then mark units sent to the manufacturer.
30. Lower the stock to its threshold and confirm a low-stock alert appears on the dashboard.

Exercise

1. Create a test inventory line.
2. Perform each stock operation and observe the counts.

3. Trigger a low-stock alert.

Lesson 8: Reports

Goal: generate and read the key reports.

31. Open the Reports menu.
32. Generate the Open Claims Ageing report and review the PDF.
33. Generate a Warranty Certificate for your test product.
34. Try the Warranty Expiry Forecast with a date range.

Exercise

1. Generate three different reports.
2. Open each resulting PDF and confirm the data matches your test records.
3. Note where the PDFs are saved.

Lesson 9: Administration (Administrators Only)

Goal: manage users and permissions. Skip if you are not an administrator.

35. Open the Users area and create a test Staff account.
36. Sign in as that account (in a separate session) and note the reduced menu set.
37. In Role Permissions, grant or remove a specific menu item for the Staff role and observe the effect on next sign-in.
38. Review Dealer / Branding Setup and change the brand colour, then restart to see it applied.

Exercise

1. Create a test Staff user and explore the app as that user.
2. Adjust one role permission and confirm the change.
3. Update a branding setting and restart to apply it.

Lesson 10: Good Habits

Goal: adopt practices that keep your data safe and your records clean.

- **Back up regularly.** Copy the C:\ProgramData\SolarWarrantyPro folder to external or cloud storage on a schedule.
- **Use consistent naming.** Enter customer and manufacturer names consistently so search and reporting stay reliable.
- **Record claims promptly.** Capture inspections and decisions as they happen, so the audit trail is accurate.
- **Manage your own password.** Keep it strong and private; never share accounts between staff.

- **Clean up test data.** If you practised on the live system, remove or clearly mark your TEST records.

Course Complete

You have now practised every major area of SolarWarranty Pro. For ongoing reference, keep the User Guide handy — it documents each feature in detail. For installation and configuration, see the Setup Guide.

Where to get help

Product website	https://solarwarrantypro.com
Support email	support@solarwarrantypro.com
Self-service portal	https://solarwarrantypro.com
Publisher	Computer Aided Business Systems (Lagos, Nigeria)

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