

SolarWarranty Pro

Quick Start Guide

Get up and running in under 30 minutes

Version 2.4

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Computer Aided Business Systems

Lagos, Nigeria

What's New in v2.4

SolarWarranty Pro v2.4 is a production release focused on the data layer and activation experience. It builds on the v2.3 licensing upgrade and the v2.1 multi-manufacturer foundation. The v2.4 changes that affect this guide are:

- **SQLite default database** — the application now uses an embedded SQLite database by default, replacing Microsoft Access. There is no longer any Access Database Engine (ACE) driver to install. See §1 and §2.2.
- **64-bit application** — SolarWarranty Pro now runs as a native 64-bit process.
- **Paste-to-activate licensing** — activation is a single pasted licence block, with no separate file to browse for. See §2.1.
- **Manage Licence Online** — licence transfer and deactivation are now handled through the customer self-service portal, reached from Help → About.

Upgrading from v2.3? v2.4 is an in-place upgrade. An Access database from v2.3 is migrated to SQLite automatically on first launch; SQL Server installations are unaffected. Your data is preserved. See the v2.4 Release Notes §7 for the upgrade procedure.

1 Prerequisites

Before installing SolarWarranty Pro, ensure the following are in place on the PC that will run the application:

- Windows 10 or Windows 11 (64-bit)
- .NET Framework 4.8 — usually pre-installed on Windows 10/11
- Visual C++ Redistributables 2015–2022 — bundled with the installer
- A valid SolarWarranty Pro licence block (a signed text block supplied by Computer Aided Business Systems — see §2.1)

No Access driver needed. Unlike earlier versions, v2.4 does not require the Microsoft Access Database Engine. The default backend is an embedded SQLite database with no external driver. The only customers who need a separate database engine are those who deliberately choose the advanced SQL Server backend.

2 First Launch

2.1 Licence Activation

Before anything else, the Licence Activation screen appears. Activation in v2.4 is a single step:

- **Licence Key** — paste the complete signed licence block supplied by Computer Aided Business Systems into the field, then click Activate.

The Machine ID for this computer is shown at the top of the form. You only need this value if you are requesting a perpetual licence or a transfer — see the TIP below.

Demo vs. perpetual. DEMO licences are valid for 30 days from first activation and are not machine-locked. PERPETUAL licences are locked to the specific machine on which they are activated and do not expire. To upgrade a DEMO to a PERPETUAL, provide your Machine ID (shown on the activation screen) to Computer Aided Business Systems, or use Manage Licence Online from Help → About.

2.2 Database — No Driver Check Needed

Because the default backend is SQLite, there is no Access Database Engine check at first launch. The database is created automatically and the application proceeds directly to the Setup Wizard. (If you choose the SQL Server backend in the wizard, you will provide a connection string instead — see the Setup Guide.)

2.3 Setup Wizard

After activation, the Setup Wizard runs automatically. Work through all 5 steps:

Step	Screen	What to do
1	Database Engine	Select SQLite (default, recommended for single-PC use). Choose SQL Server for multi-user network deployments.
2	Company Details	Enter your dealership name and tagline. These appear on the login screen and reports.
3	Manufacturer	Enter your primary manufacturer name and website URL. Additional manufacturers can be added later.
4	Currency	Choose a preset (Nigeria NGN, Ghana GHS, USD, GBP, EUR) or enter a custom symbol and ISO code.
5	Brand Colour	Pick a colour swatch or enter a custom hex code. This colours the menu bar, login screen, and the Manufacturer Claim Report PDF header.

Click Finish Setup. The database is created automatically and you are taken to the login screen.

Default login: username admin, password Admin@1234. The system will FORCE you to change this password on your first login — see §2.4.

2.4 Force Password Change on First Login

SolarWarranty Pro requires every new user to change their password the first time they log in. This protects against unauthorised access using default or admin-assigned temporary passwords.

When you log in as admin for the first time (or as any newly-created user), the Change Password dialog appears immediately after authentication. You must complete the change to access the application — cancelling the dialog returns you to the login screen.

Password rules: at least 8 characters, with at least one uppercase letter, one lowercase letter, and one digit. Your new password cannot be the same as your current one.

The same force-change dialog appears whenever an administrator resets a user's password through Admin → User Management, ensuring users always control their own passwords.

3 Essential Admin Setup (do this first)

Complete these steps before entering any product or claim data:

3.1 Add Manufacturers

Go to Admin → Manage Manufacturers. Add every manufacturer whose products you sell and service. SolarWarranty Pro supports multiple manufacturers — each gets its own warranty periods and void reasons, automatically seeded with defaults (Inverter 24 months, Battery 60 months, Panel 120 months).

3.2 Configure Warranty Periods

Go to Admin → Warranty Period Settings. Select each manufacturer and adjust the warranty months for each product type to match that manufacturer's actual warranty terms.

3.3 Create Users

Go to Admin → User Management. Create accounts for each staff member. Roles available:

- **Admin** — full access including user management, manufacturer config, branding
- **Manager** — claims decisions (including escalation), manufacturer claim log, all operational screens
- **Staff** — product registration, claim intake, customers, inventory
- **Technician** — inspection form only (My Inspections)

Force password change. When you create a new user, the “Force user to change password at next login” checkbox is ticked by default. Leave it checked unless you have a specific reason to disable it.

3.4 Add Installers and Technicians

Go to Customers → Manage Installers to add your certified installers. Go to Customers → Manage Technicians to add your inspection technicians. Both lists are used during product registration and claim assignment. Technician records are automatically linked to their user accounts — disabling a Technician user also removes them from the assignable technician list.

3.5 Role Permissions (Optional)

SolarWarranty Pro v2.4 ships with sensible default permissions for each role — Manager, Staff, and Technician — so most dealerships never need to touch this screen. If you want to customise who can access what (e.g. let Staff use Bulk Import, or restrict a Manager's access to Reports), go to Admin → Role Permissions. Changes take effect on each user's next login. See the User Guide §9.6 for the full walkthrough.

4 Register Your First Product

1. Go to Products → Register New Product
2. Select the Manufacturer from the dropdown
3. Enter Serial Number, Batch Number, Product Type (Inverter / Battery / Panel), and Model Name
4. Search for the customer or click + New Customer to add them
5. Select the Installer and set the Installation Date and Location
6. The Warranty section auto-calculates the expiry date based on the manufacturer's configured period
7. Click Register Product

Registration metadata. The system records who registered each product and when. This information appears on the Warranty Certificate and in the audit log.

5 Submit Your First Claim

8. Go to Claims → Submit New Claim

9. Enter the product serial number and click Search
10. The system shows warranty status (Valid / Expired / Void)
11. Enter a fault description (minimum 20 characters)
12. Click Submit Claim — fraud checks run automatically
13. Each claim is assigned a unique Claim Number in format CLM-YYYYMMDD-XXXXX (for example, CLM-20260629-00002) for easy reference

ESCALATION WORKFLOW

Escalation workflow. Managers reviewing a claim can choose Escalate (in addition to Approve and Reject). Selecting Escalate prompts for a reason of at least 20 characters. The claim moves into the Escalated state where only an Admin can resolve it. The escalation metadata — who escalated, when, and why — is preserved permanently alongside the eventual final decision.

6 Daily Workflow Summary

Task	Where to go
Register a new product sale	Products → Register New Product
Check warranty on a unit	Products → Search / View Products — enter serial number
Submit a warranty claim	Claims → Submit New Claim
Assign a technician to a claim	Claims → Manage Claims — select claim, choose technician, click Assign
Complete an inspection	Claims → My Inspections (Technician role)
Approve, reject, or escalate a claim	Claims → Manage Claims — Manager+ role required
Resolve an escalated claim	Claims → Manage Claims — Admin role required
Track manufacturer recovery	Manufacturer → Mfr Claim Log
Generate Manufacturer Claim Report PDF	Manufacturer → Mfr Claim Log — select claim, click Manufacturer Claim Report
Check stock levels	Inventory → View / Manage Stock (filter by manufacturer)
Update branding or currency	Admin → Dealer / Branding Setup
Register many products at once	Products → Bulk Import Products (Manager+)
View reports and print warranty certificates	Reports → Open Reports
Review audit trail	Reports → Open Reports → Audit Log (Admin role)
Reset a user's password	Admin → User Management → select user → Edit
Open the User Guide or any other doc	Help → Documentation → [pick a document]
Transfer or manage your licence	Help → About → Manage Licence Online

7 Reports at a Glance

SolarWarranty Pro ships with the following standard reports, accessible from Reports → Open Reports:

#	Report	Purpose
1	Open Claims Ageing	Claims not yet closed, with days-open and assigned technician
2	Manufacturer Recovery Summary	Compensation received and outstanding per manufacturer
3	Warranty Expiry Forecast	Products coming off warranty within a chosen window
4	Inventory Stock Levels	Current stock with low-stock flags
5	Claims by Status	Claim counts grouped by status
6	Warranty Certificate	Printable certificate for a specific product
7	Claim History by Customer	All claims for a single customer
8	User Activity	Products registered, claims submitted, and inspections completed per user

Manufacturer Claim Report. In addition to these standard reports, the Manufacturer Claim Log includes a Manufacturer Claim Report button that produces a complete claim package PDF for sending to a manufacturer. The PDF header colour follows your dealership brand colour. See the User Guide §6.5.

8 Bulk Import (Optional)

For large installations with hundreds of products, use Products → Bulk Import Products instead of registering one at a time. Download the CSV template, fill it in, validate, then import. The validator checks every row before any data is written — fix errors and re-validate until clean.

Excel users — leading zeros on phone numbers. Excel may automatically strip leading zeros from phone numbers (e.g., “0803999888” becomes “803999888”) when saving as .xlsx. SolarWarranty Pro detects this during validation and warns on any 10-digit phone in a .xlsx file. To avoid the issue: (1) prefer .csv format, or (2) format the phone column as Text in Excel BEFORE entering data.

9 Database File Location

The SQLite database file is created automatically at:

C:\ProgramData\SolarWarrantyPro\SolarWarrantyPro.db

Back up this file regularly. It contains all your product registrations, claims, users, and settings. Because the entire dataset is a single file, backup is simple — copy SolarWarrantyPro.db to a secure network location or cloud storage daily. For multi-user or high-volume deployments, consider the SQL Server backend — see the Setup Guide for details.

10 Getting Help

- **User Guide** — full feature documentation. Open from Help → Documentation → User Guide inside the application, or from <install-folder>\docs\UserGuide.html in any web browser.
- **Setup Guide** — deployment, configuration, SQL Server setup, and licence activation reference for IT administrators
- **Training Manual** — role-based training with exercises and knowledge checks

- **System Design** — technical architecture reference for IT administrators and developers
- **Release Notes** — changes in this release, including the v2.3 → v2.4 upgrade procedure

For support, contact Computer Aided Business Systems, Lagos, Nigeria. Email: support@solarwarrantypro.com. Web: <https://solarwarrantypro.com>.