

# SolarWarranty Pro

## User Guide

*Complete operational reference for all roles*

**Version 2.5.0**

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**Computer Aided Business Systems**

Lagos, Nigeria

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## Document Information

| Property                    | Value                                                                                                                                                                                                                                                                                                                                                                      |
|-----------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Document Version            | 2.4   July 2026                                                                                                                                                                                                                                                                                                                                                            |
| Product Version             | SolarWarranty Pro v2.5                                                                                                                                                                                                                                                                                                                                                     |
| Audience                    | All application users — Admins, Managers, Staff, Technicians                                                                                                                                                                                                                                                                                                               |
| What's new in this revision | Embedded SQLite default database (replaces Microsoft Access); no Access Database Engine required. 64-bit application. Single paste-to-activate licence step. Licence transfer and deactivation handled through the customer self-service portal (Manage Licence Online) in place of the in-app deactivation flow. All v2.3 functionality is otherwise preserved unchanged. |

**What v2.5 retains from v2.3 and v2.1.** The Manufacturer Claim Report (PDF), the Escalation workflow for borderline claims, xlsx leading-zero detection in Bulk Import, the Help → Documentation submenu, and RSA-signed licensing are all retained. Day-to-day workflows — registration, claims, manufacturer recovery, inventory, reports — are unchanged. The changes in v2.5 are to the database backend, the application bitness, and the licence activation/management experience.

## 1 Overview

SolarWarranty Pro is a multi-manufacturer solar equipment warranty management system for dealerships. It tracks every product sold, manages warranty claims from submission through manufacturer recovery, maintains replacement inventory, and provides real-time dashboard reporting.

The application supports four user roles with graduated access:

| Role       | Access Level                                      | Typical User                           |
|------------|---------------------------------------------------|----------------------------------------|
| Admin      | Full access — includes resolving escalated claims | System administrator, dealership owner |
| Manager    | Operational + decisions including escalation      | Service manager, operations manager    |
| Staff      | Day-to-day operations                             | Service staff, customer service agents |
| Technician | Inspection form only                              | Field technicians, service engineers   |

## 2 First-Run Setup and Licence Activation

### 2.1 Licence Activation

SolarWarranty Pro requires a valid licence. On first run the activation screen appears before login. Licensing is handled by the central CABS licensing service, and there are two ways to activate.

#### Activating online

Enter the licence number and activation code supplied with your purchase.

Choose online activation. This computer contacts the licensing service, which checks the details and issues the licence.

The licence is then verified on this computer before it is accepted, and you continue to setup.

### Activating from a licence file

Where the computer has no internet access, your supplier can issue a licence file with the extension .swplic. Paste its contents into the activation screen, or load the file from disk. It goes through exactly the same verification.

**Important** A .swplic file is a CREDENTIAL. It carries no lock to your machine, so anyone who has the file can install the licence on any computer. Store and transfer it as carefully as a password, and do not forward it.

**Note** Pressing Enter in either of the online fields runs online activation, not the file route.

Licensing and activation enquiries go to support@cabsystemsapp.com. That is a different address from general product support, which is given in Getting Help.

## 2.2 Obtaining a Perpetual Licence

Licence type — DEMO or PERPETUAL — is recorded centrally against your licence, so upgrading from a demonstration licence does not require you to exchange files with anyone. Ask your supplier to upgrade the licence, then activate again on this computer using the same licence number and activation code. The new entitlement is issued by the service.

A demonstration licence has an expiry date. Once it passes, the application reports that the licence has expired and activation is required; your data is untouched.

Moving to a new computer: deactivate on the old one first, which returns the activation so it can be used again, then activate normally on the new machine. If the old machine is no longer available, contact licensing support.

## 2.3 Database Setup — No Driver Check

Because v2.5 uses an embedded SQLite database by default, there is no Microsoft Access Database Engine check after licence activation. The application proceeds directly to the Setup Wizard and creates the database automatically. (On the advanced SQL Server backend you supply a connection string in the wizard instead; there is still no ACE check.)

## 2.4 Database Setup (First Run)

After licence activation, the Setup Wizard runs automatically on first launch. It collects branding, currency, and database settings in five steps:

| Step           | What you configure                                                                                                                                                        |
|----------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 1 Database     | Choose SQLite (local file, single user — default) or SQL Server (networked, multi-user). For SQL Server enter the server name, database name, and authentication details. |
| 2 Company      | Company name, tagline, address, phone, email, and website.                                                                                                                |
| 3 Manufacturer | Your primary manufacturer name and website URL. Additional manufacturers can be added later via Admin → Manage Manufacturers.                                             |
| 4 Currency     | Currency symbol, ISO code, date format, and locale code.                                                                                                                  |
| 5 Branding     | Primary brand colour (hex code or use the colour picker). Used on the menu bar, login screen, form headers, and the Manufacturer Claim Report PDF header.                 |

For SQL Server, click Test Connection before clicking Finish to verify the server is reachable. The application creates the database automatically if it does not exist. For SQLite, the database

| Step | What you configure                                                                                     |
|------|--------------------------------------------------------------------------------------------------------|
|      | file is created at C:\ProgramData\SolarWarrantyPro\SolarWarrantyPro.db — no additional steps required. |

## 2.5 Managing Your Licence Online

Licence lifecycle operations — moving SolarWarranty Pro to a new computer, or retiring a perpetual licence so it can be re-issued — are handled through the customer self-service portal. The in-application deactivation flow used by earlier versions has been retired.

To manage your licence:

1. Open Help → About and click Manage Licence Online. Your default browser opens the customer self-service portal.
2. Sign in and choose the operation you need — for example, Transfer to a new machine. You will be asked for your current Machine ID (shown on the About dialog and the activation screen).
3. Follow the portal's steps. For a transfer, the portal releases the binding on the old machine and issues a new licence block for the new machine.
4. On the new machine, paste the re-issued licence block into the activation screen and click Activate.

Your customer data is never affected by a licence operation. Everything in C:\ProgramData\SolarWarrantyPro\ — database, claim media, audit logs — is preserved. Managing a licence online changes only the licence, not your data. The portal address is also shown at <https://solarwarrantypro.com>.

## 3 Login and Dashboard

### 3.1 Logging In

Enter your username and password on the login screen. The system locks after 5 failed attempts — restart the application to reset the counter. Press Enter in the password field to log in without clicking the button.

### 3.2 First Login — Required Password Change

On your first ever login, or whenever an administrator has reset your password, you are **REQUIRED** to change your password before accessing the application. The Change Password dialog appears automatically after a successful username/password check and blocks the main application until a new password is chosen.

Your new password must meet all of the following rules:

- At least 8 characters long
- At least one uppercase letter (A-Z)
- At least one lowercase letter (a-z)
- At least one digit (0-9)
- Must be different from your current password

If you cancel the Change Password dialog, you will be logged out with a message “Password change is required to continue.” You cannot access any part of the application until the password change is completed. For full details on password management, see §11.

### 3.3 Dashboard

After login, the dashboard shows six real-time tiles:

| Tile                      | What it shows                                                      |
|---------------------------|--------------------------------------------------------------------|
| Total Registered Products | Count of all products registered across all manufacturers          |
| Open Claims               | Claims not yet Closed or Rejected (includes Escalated)             |
| Fraud Flags (Unreviewed)  | Claims with fraud alerts still in an open status                   |
| Mfr Claims Pending        | Manufacturer claims with status Pending or Submitted               |
| Low Stock Alerts          | Inventory lines at or below their low stock threshold              |
| Recovery This Month       | Total compensation received from manufacturers this calendar month |

The dashboard refreshes automatically every 60 seconds. It hides when a child window is open and reappears when all windows are closed. The brand colour you configured in Setup is consistently applied across the menu bar, status bar, dashboard title, and grid headers.

## 4 Product Registration

Every product sold must be registered before a warranty claim can be submitted against it. Registration records the product, the customer, the installer, and calculates the warranty expiry date automatically. The system also records who registered each product and when — this information appears on the Warranty Certificate footer.

### 4.1 Registering a New Product

5. Go to Products → Register New Product
6. Select the Manufacturer from the dropdown at the top (required)
7. Enter Serial Number — must be unique across all registrations
8. Enter Batch Number, select Product Type (Inverter / Battery / Panel), select Sub-Type if applicable, enter Model Name
9. Search for the customer by name or phone, or click + New Customer
10. Select the Installer, set Installation Date and Location, enter Invoice Number
11. The Warranty panel auto-calculates months and expiry date based on the selected manufacturer's configured warranty periods
12. Click Register Product

Warranty months are set per manufacturer per product type in Admin → Warranty Period Settings. Changing them only affects new registrations — existing records are not altered.

The Sub-Type field allows further classification within a product type — for example Lithium, Lead-Acid, or Gel within the Battery type. Sub-types are free-text and optional. The system automatically records the registration date and registering user — these appear in the audit log and on the Warranty Certificate footer.

## 4.2 Searching Products

Go to Products → Search / View Products. The grid loads products in pages and colour-codes them:

- **Green rows** — warranty valid with more than 30 days remaining
- **Amber rows** — warranty expires within 30 days
- **Red rows** — expired or voided warranty

Type in the search box to filter by serial number, customer name, or model name. Double-click a row to open the full product detail screen.

**Fast on large datasets.** Product Search pages results rather than loading the entire catalogue at once, so it stays responsive even with tens of thousands of registered products. Use the Next / Previous controls to move through pages, or narrow the list with the search box.

## 4.3 Product Detail

The product detail screen shows all registration information and current warranty status. Administrators and Managers can void a warranty from this screen — voiding is logged, permanent, and cannot be undone without Admin intervention. The registration metadata (who registered the product and when) is visible here and on the Warranty Certificate.

## 4.4 Bulk Import Products (Manager / Admin)

For large installations with hundreds or thousands of products, use Products → Bulk Import Products instead of registering one at a time. This menu item is visible to Managers and Admins only.

13. Go to Products → Bulk Import Products
14. Click Download Template to get a pre-formatted CSV file with all required columns and an example row
15. Fill in the template in Excel or any spreadsheet application. Delete the comment rows (starting with #) and the example row before saving
16. Click Browse and select your completed CSV or .xlsx file
17. Click Validate File — the system checks every row before importing anything. Errors are shown in the grid with red highlighting
18. Fix any errors in your file, re-browse, and re-validate until no errors remain
19. Click Import Products — all rows are imported in a single transaction. If anything fails, the entire import is rolled back
20. Click Export Error Report at any time to save a CSV of all row results for your records

**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 flags any 10-digit phone number in a .xlsx file with a Warning. To avoid the issue: (1) prefer .csv format which is treated as authoritative text, or (2) format the phone column as Text in Excel BEFORE entering data.

### CSV Template Columns

| Column       | Required | Notes                                           |
|--------------|----------|-------------------------------------------------|
| SerialNumber | Yes      | Must be unique in the file and in the database. |
| BatchNumber  | Yes      | From product label or delivery note.            |
| ProductType  | Yes      | Must be exactly: Inverter, Battery, or Panel.   |

| Column               | Required | Notes                                                                                                             |
|----------------------|----------|-------------------------------------------------------------------------------------------------------------------|
| SubType              | No       | Optional free-text sub-classification.                                                                            |
| ModelName            | Yes      | Full product model name.                                                                                          |
| PowerRating          | No       | e.g. 5000W, 200AH.                                                                                                |
| InvoiceNumber        | Yes      | Sales invoice reference.                                                                                          |
| InstallationDate     | Yes      | Format: YYYY-MM-DD. Cannot be a future date.                                                                      |
| InstallationLocation | Yes      | Full site address.                                                                                                |
| Notes                | No       | Optional free-text notes.                                                                                         |
| CustomerName         | Yes      | Full customer name.                                                                                               |
| CustomerPhone        | Yes      | Used to find existing customers. If no match, a new customer is created automatically.                            |
| CustomerEmail        | No       | For new customers only.                                                                                           |
| CustomerRegion       | No       | For new customers only.                                                                                           |
| InstallerPhone       | No       | Matched against the Installers list. If not found, product is imported without an installer (warning, not error). |
| ManufacturerName     | Yes      | Must exactly match an active manufacturer name in the system.                                                     |

## 5 Claims Management

### 5.1 Submitting a Claim (Staff / Manager / Admin)

Go to Claims → Submit New Claim.

21. Enter the product serial number and click Search
22. Review the warranty status displayed (Valid / Expired / Void / Not Registered)
23. Enter a fault description — minimum 20 characters
24. Set the claim date
25. Click Submit Claim

Each claim is assigned a unique Claim Number in the format CLM-YYYYMMDD-XXXXX — for example CLM-20260629-00002. This number is used throughout the system to reference the claim and appears on manufacturer claim entries, reports, and audit logs.

On submission the system runs automatic fraud detection. If flags are raised a warning panel appears — the claim is saved but flagged for senior review. Fraud checks include:

- **Repeat claim:** same product claimed more than once within 90 days
- **High volume:** same customer with 3 or more claims within 60 days

### 5.2 Managing Claims (Staff / Manager / Admin)

Go to Claims → Manage Claims. The left panel shows claims in a filterable, paged grid — it opens to the active (open) claims by default. Select a claim to see full details on the right.

**Fast on large datasets.** Manage Claims loads claims a page at a time and defaults to open claims, so the screen opens quickly even when the system holds tens of thousands of historical claims. Use the status filter and the Next / Previous controls to move through the list.

## Assigning a Technician

Select the claim, choose a technician from the dropdown, and click Assign Technician. The claim status changes to Assigned. Only technicians whose user accounts are active appear in this dropdown — see §8.3 for details on the technician/user account linking.

## Making a Decision (Manager / Admin)

Select a claim in PendingReview status. In the Decision section choose Approve, Reject, or Escalate. Select a Resolution (Repair / Replace / Reject). Click Save Decision.

**Manufacturer claim is auto-created on every Approve.** When you Approve a claim — with EITHER Repair OR Replace as the resolution — a manufacturer claim entry is created automatically in the corresponding manufacturer's claim log. There is no checkbox to enable or disable this behaviour: every Approve produces a manufacturer claim entry, ready for cost recovery from that manufacturer.

## Escalating a Claim (Manager)

When a claim is borderline — unclear fault attribution, contested fraud flag, customer dispute — a Manager can choose Escalate instead of Approve or Reject. Selecting Escalate opens a modal dialog requiring a reason of at least 20 characters. The Escalate button is disabled until the reason meets the minimum length. Once submitted, the claim moves into the Escalated state.

Escalated claims behave as follows:

- A Manager who later opens an Escalated claim sees the Approve / Reject / Escalate radio buttons and the Save Decision button DISABLED. The claim cannot bounce around between Managers — only an Admin can resolve it.
- When an Admin opens an Escalated claim, Approve and Reject are available. Re-escalating an already-escalated claim is not permitted.
- Escalation metadata — EscalatedBy, EscalatedDate, EscalationReason — is preserved permanently. When the Admin resolves the claim, the final decision is recorded alongside the original escalation, giving a complete audit trail.
- If the Admin Approves an Escalated claim, a manufacturer claim entry is auto-created in the same way as a normal Approve.

## Closing a Claim

Click Close Claim to move the claim to Closed status. Closed claims are read-only.

## 5.3 Technician Inspection

Go to Claims → My Inspections (Technician role only). This screen shows all claims assigned to the logged-in technician.

26. Select a claim from the list
27. Work through the product-specific checklist — tick any void conditions that apply
28. Enter your diagnosis (minimum 50 characters)
29. Select the fault category
30. Upload photo evidence using the Upload Photo button (at least 1 photo required)
31. A live Warranty Result preview appears at the bottom of the form, showing what the warranty result will be (Valid, Void, etc.) based on what you have ticked in the checklist
32. Click Submit Inspection

If checklist void conditions are ticked, the warranty result is automatically set to Void. If fewer than 3 photos are uploaded a NO-PHOTO fraud flag is added to the claim record. The Warranty Result preview updates in real time as you tick or untick checklist items, so you can see the impact of each observation.

## 6 Manufacturer Claims

Go to Manufacturer → Mfr Claim Log. Use the Manufacturer filter at the top to view claims for a specific manufacturer or all manufacturers at once. The grid includes an Internal Claim Number column showing the source ClaimNumber from your own claim log — making it easy to cross-reference a manufacturer claim back to the original warranty claim.

### 6.1 Submitting to Manufacturer

Select a Pending claim row. Enter the manufacturer's reference number and click Mark as Submitted. The status changes to Submitted and the sent date is recorded.

### 6.2 Recording Manufacturer Response

When the manufacturer responds, select the claim and use the Update Status section:

- Set status to Approved, Rejected, or In Dispute
- Enter the manufacturer response text
- For Approved claims, enter the compensation amount and payment date
- Click Update Status

Approved compensation payments contribute to the Recovery This Month dashboard tile.

### 6.3 Internal Claim Number Column

Each row in the Manufacturer Claim Log shows the Internal Claim Number — the source ClaimNumber from tblClaims that triggered the manufacturer claim entry. Use this to cross-reference back to the original warranty claim, the customer, the product, and the inspection report.

### 6.4 Multi-Manufacturer Filter

The Manufacturer dropdown at the top of the screen lets you filter to a single manufacturer or view all manufacturers together. This is useful when reconciling cost recovery with a specific manufacturer or preparing batch submissions.

### 6.5 Manufacturer Claim Report (PDF)

Generate a complete branded claim package as a PDF and send it to the manufacturer in one click.

To generate a Manufacturer Claim Report:

33. Go to Manufacturer → Mfr Claim Log
34. Select any claim row in the grid
35. Click the Manufacturer Claim Report button
36. The system assembles the report and opens it in your default PDF viewer
37. The PDF is also saved to C:\ProgramData\SolarWarrantyPro\ClaimReports\ with a filename like Claim\_CLM-20260629-00005\_for\_EcoSun\_Technologies.pdf

The PDF contains:

- Branded header band in your dealership's primary brand colour, with company name, tagline, and the claim number
- Title "MANUFACTURER CLAIM REPORT" top right
- Claim Details: claim dates, decision, resolution, warranty result, fault code, fraud flags, full fault description
- Customer Information: name, phones, email, address, region
- Product Information: manufacturer, serial number, batch, type/sub-type, model, power rating, invoice number, registration status
- Installation Information: installer name + company, phone, install date, location, warranty period in months, expiry date
- Technician Inspection: technician name, inspection date, fault category, full diagnosis text
- Evidence Photos: file count, folder path on disk, bulleted list of file names, and a note that the photos should be attached separately when emailing the manufacturer
- Footer: generation timestamp, the username and role of the person who generated it, and your dealership's contact information

The Manufacturer Claim Report PDF is generated using the brand colour configured in Admin → Dealer / Branding Setup. If you change the brand colour, all subsequent reports will use the new colour automatically.

Every Manufacturer Claim Report generation is recorded in the Audit Log as an EXPORT action against tblManufacturerClaims, with the PDF filename in the new-value column. This gives you a complete audit trail of which claims have been packaged for which manufacturer, by whom, and when.

## 7 Inventory Management

Go to Inventory → View / Manage Stock. This screen tracks replacement units by manufacturer, product type, and sub-type. The grid displays both the Manufacturer column and the Sub-Type column so you can distinguish between, for example, "Battery — Li-Ion 24V" and "Battery — Lead-Acid 12V" within the same manufacturer.

### 7.1 Adding Inventory

Click Add New Product to Inventory. Select the manufacturer, product type, sub-type (optional), model name, initial stock quantity, and low stock alert threshold. Click Save.

### 7.2 Stock Actions

| Action            | What it does                                                                                              |
|-------------------|-----------------------------------------------------------------------------------------------------------|
| Adjust Stock      | Manually add or subtract stock (Admin only). Enter a positive or negative number in the Adjust Qty field. |
| Issue Replacement | Decreases stock by 1. Use when a replacement unit is given to a customer.                                 |
| Log Return        | Records a faulty unit returned by a customer. Increments Pending Manufacturer Return count.               |
| Sent to Mfr       | Records that pending faulty units have been sent back to the manufacturer. Decrements Pending count.      |

Rows with stock at or below the alert threshold are highlighted red. The Low Stock Alerts dashboard tile counts these rows.

### 7.3 Filtering by Manufacturer

A Manufacturer filter dropdown at the top of the Inventory screen lets you narrow the grid to a single manufacturer at a time. Select All Manufacturers to see everything, or choose a specific manufacturer to focus on that stock. This is particularly useful when reconciling stock with a specific manufacturer or preparing to send faulty units back.

## 8 Customers, Installers and Technicians

### 8.1 Customers

Go to Customers → Manage Customers. Search by name or phone. Click Add New to create a customer or select and click Edit to update details. Customer records link to all their registered products and claims.

### 8.2 Installers

Go to Customers → Manage Installers. Click Add New and enter the installer name, company, phone, and certification. Installers appear in the dropdown during product registration.

#### Deactivating and Reactivating Installers

Select an installer row in the grid and click Deactivate to mark them inactive. Inactive installers no longer appear in the product registration dropdown but their historical records are preserved. To view inactive installers tick the Show Inactive checkbox. Select an inactive row and click Activate to reinstate them.

### 8.3 Technicians

Go to Customers → Manage Technicians. Click Add New and enter the technician name, phone, and specialisation. Technicians appear in the dropdown during claim management for assignment.

Each technician also needs a user account with the Technician role to access the inspection form and receive claim assignments. When an admin creates a user account with the Technician role in Admin → User Management, a matching technician record is created automatically and linked to that user. This means:

- You do not need to manually create a technician record for each Technician user — it is done for you
- Deactivating a Technician user account automatically removes them from the claim assignment dropdown, even if the underlying technician record is still active
- If you deactivate only the technician record but leave the user account active, the technician still disappears from the assignment dropdown
- When adding a new Technician-role user, the system also checks for existing unlinked technician records by name; if a match is found, you are prompted to link to the existing record rather than creating a duplicate

#### Deactivating and Reactivating Technicians

The same Show Inactive / Activate / Deactivate controls described for Installers are available on the Technicians screen. Deactivated technicians are removed from the claim assignment dropdown but remain in historical records.

## 9 Administration

### 9.0 Communications

v2.5 adds email and WhatsApp messaging. Both are administered from the Admin area and both write to the Message Log.

#### Email (SMTP) settings

Open Admin › Email (SMTP) Settings and enter your outgoing mail server, port, sign-in details and the address messages come from. The password is encrypted on this computer and is never displayed again — the box loads empty, and leaving it blank keeps the saved password. Use Send test email to confirm the settings before relying on them; a test send is not recorded in the Message Log.

#### Submitting a manufacturer claim by email

A manufacturer claim can be emailed to the manufacturer with the claim report PDF attached. The message goes to the Contact Email held on the manufacturer record, so that field must be filled in; if it is missing you are told which manufacturer needs it rather than being given a general failure.

#### Telling a customer about a claim decision

When you approve or reject a claim, or assign a technician, SolarWarranty Pro offers to send the customer a message once the decision has been saved. The decision is committed first, so declining the offer, or a mail server failure, never affects the saved decision. If a send fails you can retry from the claim using Send Message.

**Note** The system composes; a human sends. Nothing is sent automatically, and the offer appears only when you have made the decision yourself on screen — never from a bulk or background operation. If a customer has no email address on file you are told so before anything is attempted.

#### Sending by WhatsApp

WhatsApp messages are composed for you and handed to WhatsApp, where YOU press Send. The same honest limits apply as anywhere else this is offered: text only, outbound only, WhatsApp Desktop or WhatsApp Web must be installed and signed in, and if WhatsApp will not open the message is copied to your clipboard instead. SolarWarranty Pro is never told whether a message was delivered or read.

Set your dialing country code once in Admin › Dealer / Branding Setup, in the Default Country Code field, so local numbers can be turned into international ones.

WhatsApp actions appear on claim status and pickup, on warranty expiry reminders, and on technician assignment. All of them open the same Send Message window, with the channel and template already chosen; you can change either before sending. The window shows the rendered message and warns if any placeholder could not be filled.

**Note** The number is checked for shape, not for existence. A well-formed number that is not in use will still open in WhatsApp, and WhatsApp will report that the number does not exist. Check the number in the preview before you press Send.

#### Message templates

Open Admin › Message Templates. Templates carry the wording for each channel, with placeholders filled in per message. Select Add to create one: name it, choose Email or WhatsApp, and write the body. Email templates also need a subject. A name may be reused across the two channels but not twice within one channel. Templates can be deactivated rather than deleted.

## The Message Log

Open Admin › Message Log to see what was sent, newest first, with the channel, recipient, customer, claim and who sent it. Selecting a row shows the message as it was actually sent. Filter by channel, by date range and by customer.

The log is READ-ONLY BY DESIGN. There is no edit, delete or resend anywhere on it, because it is the record of what was sent; resending belongs on the claim, where the recipient checks and the audit trail live.

### 9.1 Manage Manufacturers

Go to Admin → Manage Manufacturers. Add, edit, and activate/deactivate manufacturer records. Each manufacturer has its own warranty periods and void reasons. Adding a manufacturer automatically seeds the default warranty periods (24 / 60 / 120 months) and default void reasons.

### 9.2 Warranty Period Settings

Go to Admin → Warranty Period Settings. Select a manufacturer from the dropdown, then adjust the warranty months for each product type. Changes take effect immediately for all new product registrations. Existing registrations are not affected.

### 9.3 Warranty Void Reasons

Go to Admin → Warranty Void Reasons. These are the checklist items technicians see during inspection. They are manufacturer-specific. Use the Manufacturer and Product Type filters to view by context. Add rows directly in the grid and click Save.

### 9.4 User Management

Go to Admin → User Management. Create users with username, full name, role, and password.

#### Creating a New User

Click Add User. Enter the user's details and choose a role. Set a temporary password — this will need to meet the complexity rules (see §11). The “Force user to change password at next login” checkbox is ticked by default — leave it ticked so the new user is required to change the password on their first login. Click Save to create the user.

If you create a user with the Technician role, a matching record is automatically created in Customers → Manage Technicians and linked to the user account. You do not need to create the technician record separately.

#### Resetting a User's Password

Select the user and click Reset Password (or Edit and enter a new password). Set a temporary password meeting the complexity rules. When you save, the user's Force Password Change flag is automatically set to True — they will be REQUIRED to change the password on their very next login. This is a safety feature: it ensures that admin-assigned temporary passwords are never retained by the user.

#### Toggling Users Active / Inactive

Use the Toggle Active button to deactivate a user without deleting them. Inactive users cannot log in. Their historical records (registrations, claims, inspections, audit entries) are preserved. Deactivating a Technician-role user also removes them from the claim assignment dropdown.

## 9.5 Dealer / Branding Setup

Go to Admin → Dealer / Branding Setup. Update company name, tagline, address, contact details, currency symbol and code, date format, locale, and primary brand colour. Changes take effect on next login. Manufacturer details are managed separately via Admin → Manage Manufacturers.

The brand colour set here is propagated consistently to: the menu bar, the status bar, the dashboard title, all form headers, primary buttons, grid column headers (a slightly darker variant), and the Manufacturer Claim Report PDF header band. Set this once and your branding is consistent everywhere.

## 9.6 Role Permissions

Role Permissions lets you customise which menu items each non-Admin role (Manager, Staff, Technician) can see and use. The feature is located at Admin → Role Permissions and is available only to users with the Admin role. It ships with sensible defaults matching typical dealership workflows, so you only need to visit this screen if you want to tighten or relax those defaults.

### Default permissions

| Role       | Default access                                                                                                                                                                                                                                                                                                             |
|------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Manager    | All menu items EXCEPT those in the Admin menu. Managers can register products, submit claims, manage claims (including Escalate), use the Manufacturer Claim Log and the Manufacturer Claim Report PDF, view and adjust inventory, open all reports, and manage customers, installers, and technicians.                    |
| Staff      | Register New Product, Search / View Products, Submit New Claim, Manage Claims, View / Manage Stock, Manage Customers, Manage Installers, Manage Technicians, and Reports → Open Reports (with the Staff-appropriate report subset). Staff do NOT get: Bulk Import, My Inspections, Mfr Claim Log, or any Admin menu items. |
| Technician | Only My Inspections. Technicians see nothing else in the menu bar — the design keeps them focused on the inspection workflow.                                                                                                                                                                                              |

### Changing a permission

Open Admin → Role Permissions. The screen shows a three-column grid: Manager, Staff, and Technician. Each row is a menu item, grouped by top-level menu. The Admin role is not shown as a column — Admin always has full access and cannot have any permission revoked.

Each cell is a checkbox. Tick the checkbox to grant access; untick to revoke. Click Save Changes when done. The screen confirms that changes take effect on each user's next login.

Permission changes do not affect users who are currently logged in. If you have just changed Manager's access and a manager is currently working, their menu bar continues showing the old permissions until they log out and back in. If a change needs to take effect immediately, ask the affected user to log out and log in again.

### Resetting to defaults

Click Reset to Defaults at the bottom left to restore all three roles to their factory defaults — the same permissions they had when your dealership first installed SolarWarranty Pro. This overwrites any customisations you have made. You will be asked to confirm before the reset is applied.

### Audit trail for permission changes

Every change you make is recorded in the Audit Log. To review who has changed what and when, go to Reports → Open Reports → Audit Log and filter by Table = tblMenuPermissions. Each entry

shows which permission was changed, the before-value, the after-value, who made the change, and when. Saving the screen when no checkbox was changed produces no audit entries — only actual changes are logged.

## 10 Database Backend

SolarWarranty Pro supports two database engines. The choice is made once during first-run setup and stored in the db.config file in the application's data folder (C:\ProgramData\SolarWarrantyPro\).

| Property    | SQLite (default)                                                            | SQL Server                                                                            |
|-------------|-----------------------------------------------------------------------------|---------------------------------------------------------------------------------------|
| Best for    | Single-user or small team                                                   | Multi-user networked deployments                                                      |
| Setup       | No configuration and no driver — the database file is created automatically | Requires an existing SQL Server instance; database created automatically on first run |
| Backup      | Copy the single .db file                                                    | Use SQL Server backup tools or scheduled jobs                                         |
| Performance | Fast for typical single-site volumes; paged screens handle large datasets   | Suitable for any scale                                                                |

The database engine cannot be changed after first-run setup without re-running the Setup Wizard. Contact your system administrator if you need to switch engines.

### 10.1 SQL Server Connection String

The SQL Server connection string is stored encrypted in db.config using Windows DPAPI. The encryption is tied to the machine on which the setup wizard was run. If you move the installation to a different machine, the setup wizard will need to be re-run to re-establish the connection string encryption.

## 11 Password Management

SolarWarranty Pro enforces strong password practices for all users. This section describes the rules and flows you will encounter.

### 11.1 Password Complexity Rules

Every password you set in SolarWarranty Pro — whether creating a new user account, resetting a password as an admin, or changing your own password on first login — must meet all of the following rules:

- At least 8 characters long
- At least one uppercase letter (A-Z)
- At least one lowercase letter (a-z)
- At least one digit (0-9)

For self-service password changes, your new password must also be different from your current password.

Strong passwords aren't difficult — a passphrase like "Sunshine7" meets all the rules and is easy to remember. Avoid reusing passwords across systems, and never share your login credentials with other staff members.

## 11.2 Force Password Change on First Login

The first time you log into SolarWarranty Pro with a newly created account, you will be required to change your password immediately after authentication. The Change Password dialog appears automatically and blocks access to the application until you:

- Enter your current password (the one set by the admin)
- Enter a new password meeting the complexity rules
- Confirm the new password
- Click Change Password

If you cancel the dialog, a confirmation prompt warns you that cancelling will log you out. If you confirm, you are returned to the login screen with the message “Password change is required to continue.” You cannot access any part of the application without completing the change.

Once you successfully change your password, the force-change flag is cleared. Future logins go directly to the main application — you will not see the Change Password dialog again unless an administrator resets your password.

## 11.3 Admin-Initiated Password Resets

When an administrator resets your password (for example, if you forgot it and asked them to set a new one), the force-change flag is automatically applied to your account. The next time you log in with the admin-assigned temporary password, the Change Password dialog appears automatically and you must choose your own password.

This is a security feature, not a limitation: it ensures that admin-assigned temporary passwords are never retained. Only the user themselves knows their final password.

## 11.4 If You Forget Your Password

If you forget your password, contact an Administrator. They can reset it via Admin → User Management → Reset Password. Once they set a temporary password and share it with you (in person or by secure channel), log in — the Change Password dialog will prompt you to set your own password, which only you will know.

## 11.5 For Administrators — Resetting Another User’s Password

Go to Admin → User Management. Select the user and click Reset Password (or Edit and enter a new password). Set a temporary password meeting the complexity rules. Give the user this temporary password through a secure channel. On their next login the force-change flow will take over and they will set their own password.

The “Force user to change password at next login” checkbox in the user editor reflects this flag. When you type a new password into the Password field while editing a user, this checkbox automatically ticks itself. You can manually untick it if you have a specific reason to allow the user to retain your set password (not recommended), but the default behaviour is correct for almost every scenario.

# 12 Reports

Go to Reports → Open Reports. The Reports screen has a green sidebar listing all available reports. Click a report name to open it. Only reports available to your role are shown.

| # | Report                   | Access   | Description                                                                                          |
|---|--------------------------|----------|------------------------------------------------------------------------------------------------------|
| 1 | Open Claims Ageing       | Staff+   | All open claims ordered oldest first. Rows turn amber after 7 days and red after 14 days.            |
| 2 | Recovery Summary         | Manager+ | Compensation claimed vs received per manufacturer for a selected date range.                         |
| 3 | Warranty Expiry Forecast | Staff+   | Products whose warranty expires within 30, 60, 90, or 180 days.                                      |
| 4 | Current Stock Levels     | Staff+   | All inventory lines with stock quantities, thresholds, and movement counts.                          |
| 5 | Claims by Status         | Manager+ | Summary count per status plus a full claim detail list for a selected date range.                    |
| 6 | Warranty Certificates    | Staff+   | Search by serial number to generate a printable branded warranty certificate.                        |
| 7 | Audit Log                | Admin    | Full system audit trail filterable by date range, username, and table name.                          |
| 8 | User Activity            | Admin    | Products registered, claims submitted, and inspections completed per user for a selected date range. |

**Reports menu access for Staff.** Staff users see the Reports menu with Reports 1, 3, 4, and 6 in the sidebar. Reports 2, 5, 7, and 8 are not shown to Staff because they require a Manager or Admin role. Managers see all reports except 7 and 8 (Admin only). This default can be customised via Admin → Role Permissions.

## 12.1 Warranty Certificates

Go to Reports → Open Reports → Warranty Certificates.

38. Type the product serial number in the search box and click Search
39. The certificate renders on screen with your company branding, product details, warranty dates, customer name, installer, and the registration footer (who registered the product and when)
40. Click Print / Preview to open the Windows print preview dialog
41. Print directly or save as PDF using a PDF printer driver

The certificate uses the company name, tagline, and address configured in Admin → Dealer / Branding Setup. Update those settings before printing certificates for customers.

## 12.2 Audit Log

The Audit Log is available to Administrators only. Use the filters to narrow results:

- **Date range** — limits entries to a specific period
- **Username** — filters to a single user's actions
- **Table** — filters to a specific table (e.g. tblProducts, tblClaims, tblManufacturerClaims, tblMenuPermissions)

The Audit Log records every INSERT, UPDATE, and EXPORT operation performed by any user. It cannot be edited or deleted by any role including Admin. It is the definitive record of all system activity. Password fields are always masked in audit entries — the literal text PasswordHash=\*\*\*

is used rather than the actual hash value. Manufacturer Claim Report PDF generation is recorded with action type EXPORT and the PDF filename in the new-value column.

## 13 Logging Out

Click Logout in the menu bar. Confirm the logout prompt. The login screen returns. All session data is cleared — no data is visible until the next successful login.

Always log out when leaving your workstation unattended. SolarWarranty Pro tracks activity via the audit log — if you remain logged in and another person uses your account, the actions are attributed to you.

## 14 Getting Help

Licensing and activation, including moving a licence between computers:  
[support@cabsystemsapp.com](mailto:support@cabsystemsapp.com).

SolarWarranty Pro v2.5 includes built-in access to all customer-facing documentation through the Help menu in the menu bar. Click Help → Documentation to expand the submenu, which contains:

- **User Guide** — this document. Opens in your default web browser. No internet connection required.
- **Quick Start Guide** — the 30-minute overview for new users. Opens as a PDF.
- **Setup Guide** — installation, configuration, and SQL Server deployment reference for IT administrators. Opens as a PDF.
- **Release Notes** — changes in v2.5 and the v2.3 → v2.5 upgrade procedure. Opens as a PDF.
- **Training Manual** — role-based scenarios with exercises and knowledge checks. Opens as a PDF.

All five documents ship with the application installer in the docs folder beneath the install location. They work fully offline.

Other items in the Help menu:

- **Help → About** displays your current version, your licensed company name, your licence type, and — for DEMO licences — the days remaining.
- **Help → About → Manage Licence Online** opens the customer self-service portal in your browser for licence transfers and other licence operations (see §2.5).

For questions or support that cannot be resolved through the documentation, contact your system administrator first. For issues that cannot be resolved internally, contact Computer Aided Business Systems, Lagos, Nigeria. Email [support@solarwarrantypro.com](mailto:support@solarwarrantypro.com).