Smarter technology for all

Next Generation Service Portal
(NGSP)

Post-Live training guide v.9

NA Warranty Channels Operations Team – July 2025

Table of Content

What is NGSP?

NGSP stands for **Next Generation Service Portal**

URL: ngsp.lenovo.com

ⓘ **Google Chrome** is the **preferred browser.**

The records you are going to work with the most are **Cases and Work Orders**.

A **Case** is made up from the **unit's information** along with the **customer's information**.

In the Work Orders you will be able to **document repairs, order parts,** and, **if applicable, claim labor reimbursement.**
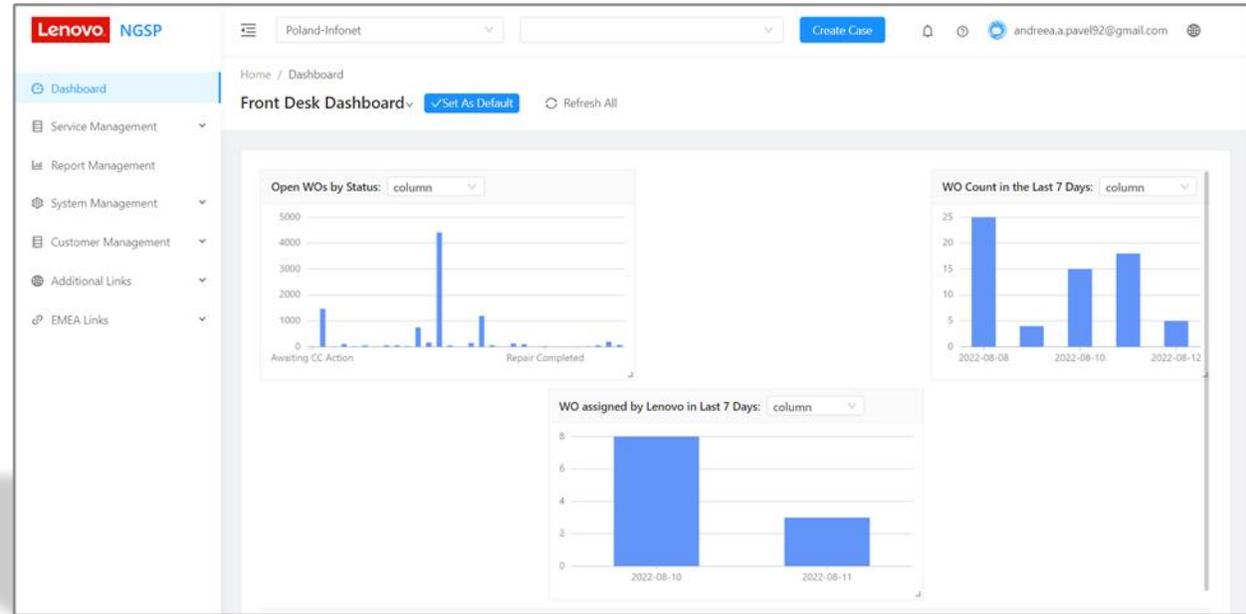
Each Work Order originates from a Case, and every active Case leads to the creation of a Work Order

ⓘ **If you work for multiple locations, make sure to select the correct one before starting your orders**

NGSP at a glance

Each page is divided into various sections.

Each section has fields for you to read, select or enter data.

Sections

Results

Texts in blue are hyperlinks or currently selected options

Free text field: Supports multiple lines. You can enter uppercase and lowercase letters, numbers, and commonly used special characters. **Emojis are not supported and should not be used.**

* Serial Number: **Red** asterisk: mandatory field

Down arrow: open drop-down menu

Up arrow: collapse drop-down menu

Yes/No slider: click to change

Checkbox: Click to select, click a second time to clear

NGSP at a glance
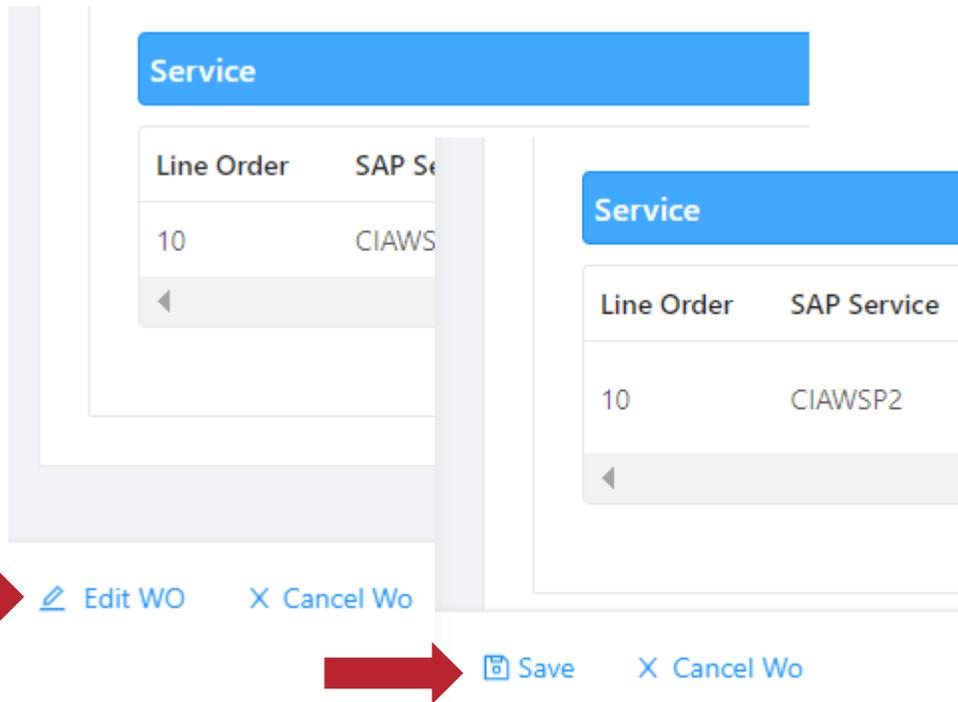
Once a Work Order has been created, you can edit it by clicking on *Edit WO* in the lower-left corner.

Make sure to save your changes by clicking the *Save* button, located in the same spot.

ⓘ Once you click *Edit WO* , the Work Order is locked for editing by others. Clicking *Save* does not unlock it—you must exit the Work Order to release the lock.

Records cannot be edited by multiple users at the same time

ⓘ **Please avoid keeping a record open longer than necessary**

NGSP - Business Role Hierarchy and Contacts

LSCRM (current) Portal Access	NGSP Portal Access	Create ASP Admin User	Create ASP Admin L2 User	Create ASP Technician User	Create Contacts	Create Cases & Work Orders	Maintain User Access & Status	Report Access
Service Manager	**ASP Admin**	*SMSC / NASPS Team	Yes	Yes	Yes	Yes	Yes	Yes
Profile Administrator	**ASP Admin L2**	ASP Admin	No	Yes	Yes	Yes	Yes	Yes
Claim Administrator	**ASP Technician**	No	No	No	No	Yes	No	Yes
Service Technician**	No	No	No	No	No	No	No	No

ⓘ **Users have access to NGSP, Contacts DO NOT have access to NGSP**

*SMSC – Support Management Team / NASPS – NA Operations Team

Service Technicians are created as Contacts and not assigned a Business role. They do not have access to NGSP

NGSP – Access Level & Business role

Viewing Your Business Role and Access Level

Hover over your email address in the upper right-hand corner to open a drop-down menu. Click on **Account Center** to access the **My Profile** screen, where all your personal information is displayed. At the bottom, under **Business Role**, you can view your access level.
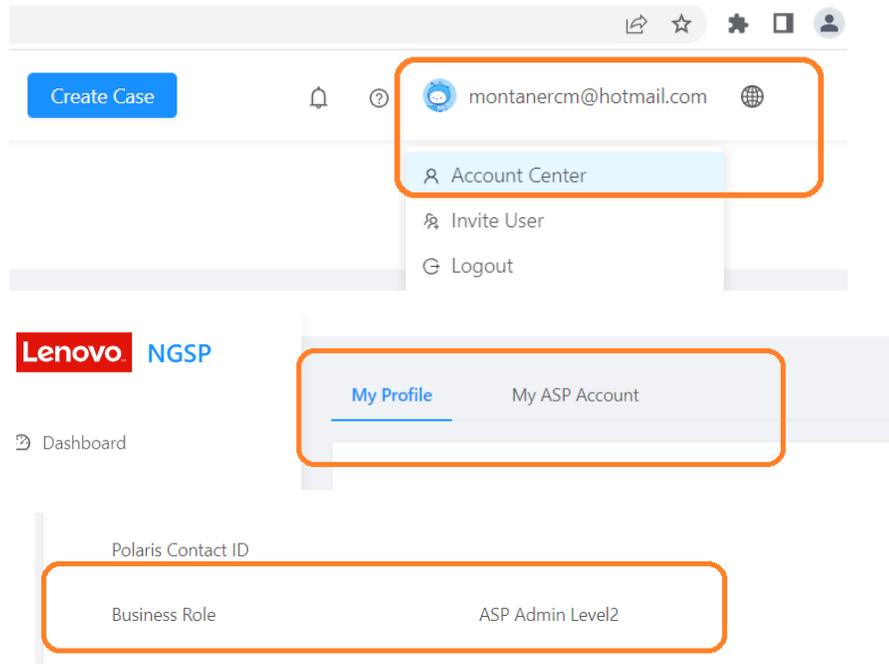
Available Business roles

- **ASP Admin – Invitations to register as an ASP Admin are sent by Lenovo.** ASP Admins can invite ASP Admin L2s and ASP Technicians, create Account Contacts, open cases, and create or edit Work Orders.

- **ASP Admin L2 -** This user can invite new ASP Technicians, create Account Contacts, open cases, and create or edit Work Orders.

- **ASP technician -** This user cannot invite other users or create Account Contacts. They can open cases, and create or edit Work Orders
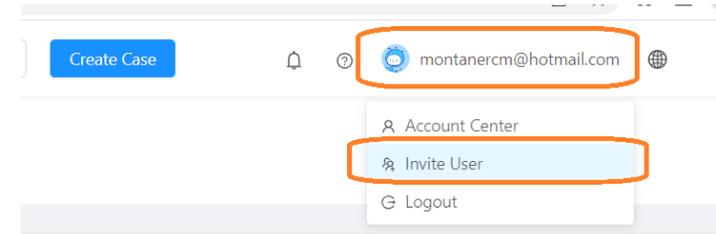
ⓘ Any ASP technician user can be picked as a "repair" Service Technician in your Work Order.

ⓘ **All ASP Technicians (users) are also Service Technicians (contacts), but not all Service Technicians (contacts) are ASP Technicians (users).**

NGSP – System Management - Invite users

How to Invite users

Hover over your email address in the upper right-hand corner to open a drop-down menu. There, you will see the option to **Invite User**.

Enter the email address (this will be the invitee's username), the location(s) that the user will be associated to, and the system (Business) role by clicking on the drop-down list.

ⓘ This function is only available for ASP Admins and ASP Admin L2.

ⓘ You can choose only ONE Business Role per user.

ⓘ **New users must be authorized by Lenovo. After receiving an invitation, they are required to complete the necessary training in Lenovo Learning and notify the SMSC to have their account activated.**

NGSP – User Registration (after user has been invited)

User registration

The invitee will receive an email with a registration link to the **NGSP** system. The registration form must be completed within 72 hours.
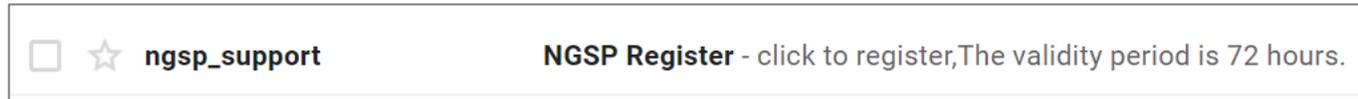
Open the email and click on the link
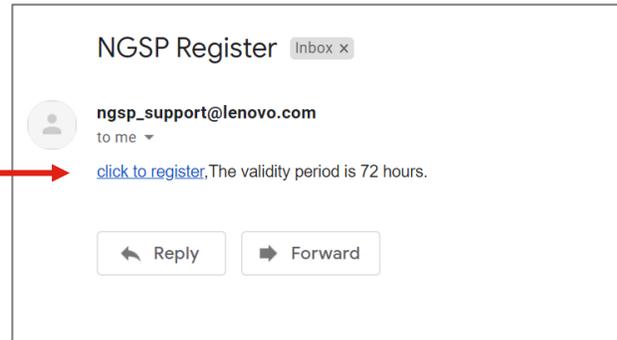
ⓘ Make sure to log in to NGSP to complete your registration. If you don't log in, your user account will not be created.

After completing the registration form (see the next slide for an example), you'll be redirected to a screen prompting you to **reset your password**.

Create your password by following the on-screen instructions, then click **Next**.

When the **success message** appears, click **Next** again to continue.

NGSP – User registration form (Example)

On the User Registration page, all fields marked with a red asterisk (*) are mandatory. Once completed, click **Save**.

You may use your business address for this registration.

ⓘ If the system finds an existing record that matches your information, it will prompt you to confirm it. If the record is not yours, simply continue filling out the form with the correct details.

ⓘ Once a user is invited, their status will be **"Waiting for Authorization".** New users must complete the following exams: CPRW168, CPRW169, CPRW161, RWST106 and RWSW239. After completing these, they should contact the SMSC to request authorization to create Cases and Work Orders.

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NGSP – System Management - Manage users

How to manage users
Only users with the **ASP Admin** or **ASP Admin L2** roles can view the *System Management* section in the left-hand menu.
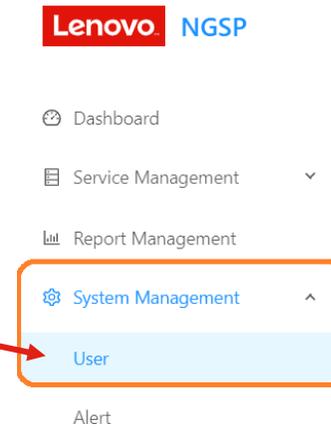
Click on *User* to see the full list of users associated to your location(s).

ⓘ If you are associated with multiple Location IDs, *make sure to switch to the correct one if it's not already selected.*

You can change your Lookup criteria by choosing from the dropdown list.

You can search users by name
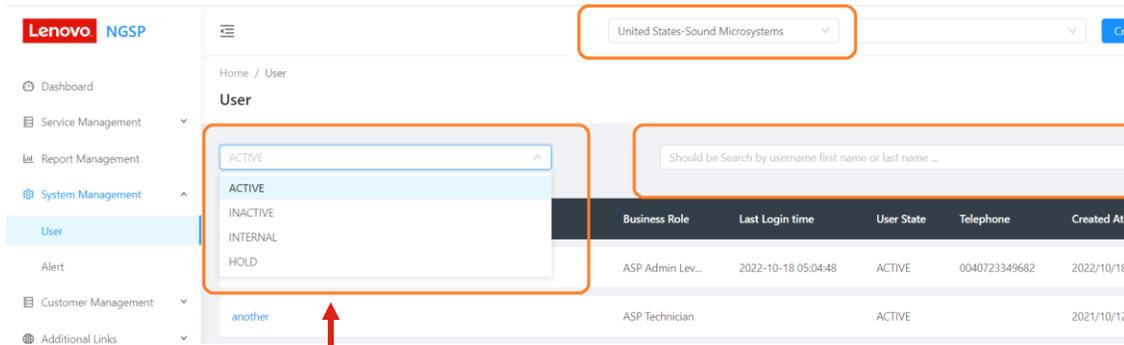
You can filter your Users by status.
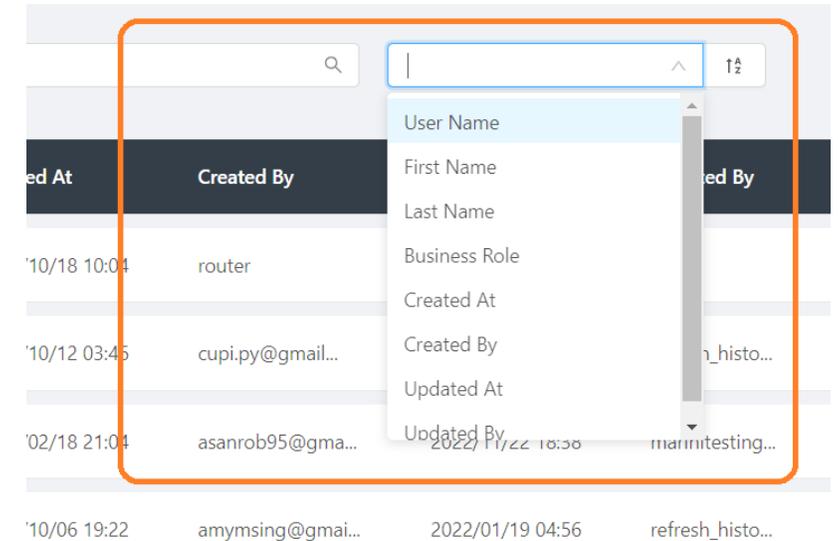
NGSP – System Management - Manage users

- Click on the **user** that you wish to see.
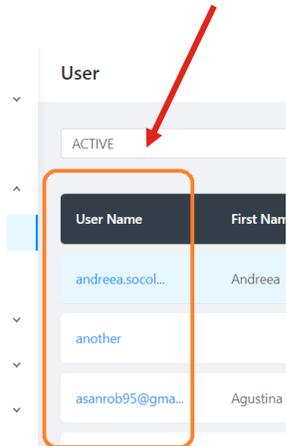
A new window with two tabs will popup:
- **Summary** which contains user data and status.
- **Location ID** with the location(s) associated to the user.

If you need to change any of the information included in these tabs, click on *Edit* and then *Save.*

NGSP – System Management – User status

ⓘ **Users cannot modify their own access or status, nor can they edit the status of users at a higher level.** (see slide 6 for business role hierarchy).

Available user statuses:

➢ **On Hold**: Users will be able to log in and view data, but they won't be able to create cases or create/edit Work Orders. An Admin user will need to reactivate them. If an ASP Admin user is On Hold, they will have to contact the SMSC for further assistance.

➢ **Active:** The user can perform task as permitted by their Business Role.

➢ **Inactive: This is a permanent status**. Once a user is inactivated, they can no longer log in and **cannot be reactivated**. If the user returns, **a new email address will be required.**

ⓘ **Users who have not logged in in 90 days will be put on hold automatically.**

ⓘ **Every 30 days, the system will prompt you to enter an authentication code during login. The code will be sent to your email address.**

NGSP – System Management - Contact Creation (no user access)

To create a contact without User Access to NGSP, hover over your email address, go to *Account Center* > *Relationships*, and click on *Create Contact*.
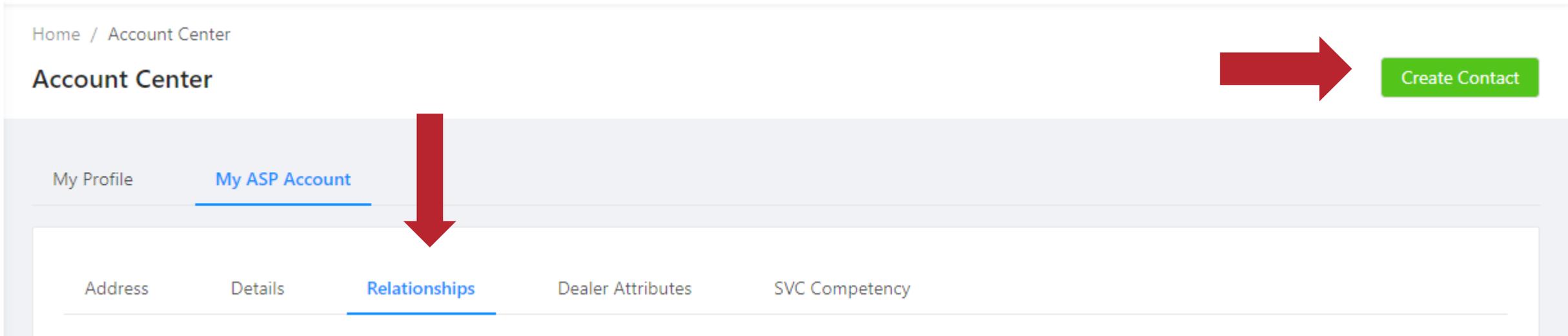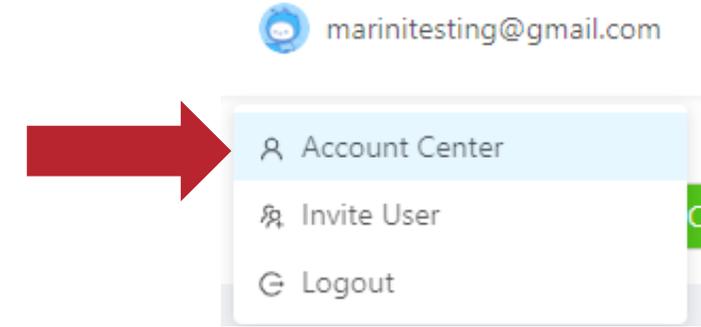
NGSP – System Management - Contact Creation (no user access)

Fill in the form that pops-up and click on **OK**.

ⓘ Reminder: all fields with an asterisk (*) are mandatory.

Afterward, a "**Create Success**" message will appear.

All your contacts will be listed here.

To find a specific contact, enter the **Name**, **Last Name**, or **Relationship Type**, then click **Search**.

ⓘ You can also click on *Export* to download an excel file containing the list of contacts.

NGSP – System Management – adding a relationship to an existing contact

- To add a relationship to an existing contact, go to Account Center > Relationship Management, copy the Contact ID that you wish to update and click on *Create Contact.*

NGSP – System Management – adding a relationship to an existing contact (continue)

- A pop-up screen will appear. Paste the contact ID into the **Contact ID** field and click **OK**. The contact's information will then populate.

- Select the **Relationship Type**, and the **Location**.

- Click on **OK**.

NGSP – System Management – deleting a relationship to an existing contact

Go to Account Center by clicking on your email address in the top-right corner of the page.
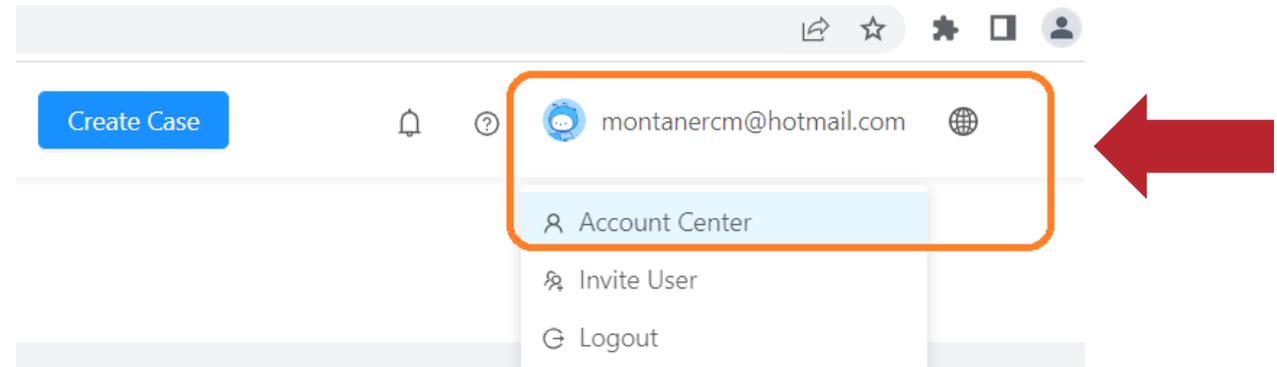
Once the Account Center page opens, click on Relationship Management.
Find the contact needed by entering the name and last name and click on Search.
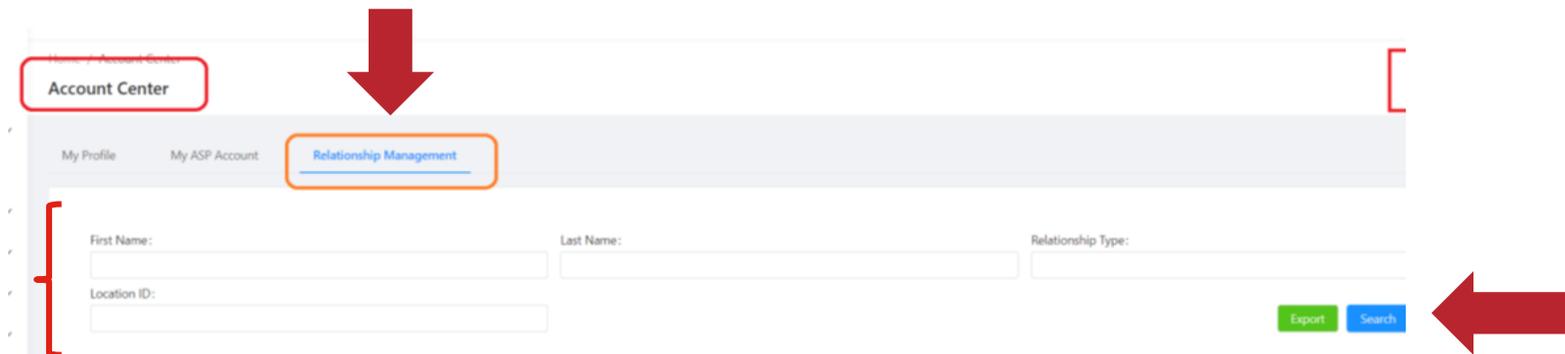
NGSP – System Management – deleting a relationship to an existing contact – (continue)

Find the relationship you want to delete, hover over the ellipsis icon, and click Delete. **Repeat this process for any additional relationships you wish to remove.**

NGSP – Mandatory training for Users & Contacts

- Users (administrative roles) – Users have access to the Service Portal and can create Cases and Work Orders.
    - ❖ ASP Admin
    - ❖ ASP Admin Level 2
    - ❖ ASP Technician**

** If the ASP Technician will also service machines, they must complete the **Technician Certification Exam – RWST217 (RASERVICE).**

Mandatory courses for administrative roles

✓ **RWST106 - Lenovo Service Support Guide** confirms that you have reviewed and understood the Lenovo Service Support

  Guide (SSG). The SSG is intended for Lenovo Authorized Self-Maintainers in the US and Canada.

✓ **CPRW161 - Administrative information and functions** – Basic administrative information and functions of the Self-

  Maintainer program. Provides a common knowledge foundation required for all other administrative training.

✓ **RWSW239** – Accidental Damage Protection.

✓ **CPRW168 - NGSP Service portal / Cases – Exam –** covers the following courses
   NGSP Intro & Basic Navigation (CPRW151)
   NGSP – Cases (CPRW152)
   NGSP – PD Features (CPRW153)
   NGSP AWSP Bath Uploads (CPRW155)

✓ **CPRW169 – NGSP Service portal / Work Orders – Exam –** covers the following courses
   Next Generation Service Portal Security and Access (CPRW156)
   NGSP – Work Orders (CPRW158)
   NGSP- Service Management Entities (CPRW162)
   NGSP- Reports and Dashboards (CPRW164)
   NGSP- DOA Work Orders (CPRW165)

NGSP – Mandatory training for Users & Contacts (continue)

- **Contacts** – DO NOT have access to the Service Portal. They are created to be selected as the Technician responsible for fixing the machine when creating a Work Order.

Mandatory training for Service Technician

✓ **RWST106 - Lenovo Service Support Guide** confirms that you have reviewed and understood the Lenovo Service Support Guide (SSG). The SSG is intended for Lenovo Authorized Self-Maintainers in the US and Canada.

✓ **CSWi21Yr2 – Lenovo Diagnostics**

✓ **RWSW206r3 – System Board Service**

✓ **RWSW239 – Accidental Damage Protection**

✓ **RWST217 – (Exam RASERVICE) Technician Certification** – It is a **mandatory exam** for all technicians. Technicians may choose to complete all, some, or none of the recommended modules (listed below) before taking the exam.

> ⓘ It is recommended that all technicians are CompTIA A+ certified. A+ is an industry standard certification program.

NA AWSPs Curriculum for Technicians Only (USEFUL CONTENT)

- RWSW227 – The Lenovo Story (12 minutes)
- RWSW228 – Lenovo Customer Service for Service Technicians (30 minutes)
- RWSW105r2 – Lenovo Customer Experience for Servicers (45 minutes)
- CPSW319 – Handling Difficult Customers (30 minutes)
- RWSW221 – Lenovo Commercial Portfolio (45 minutes)
- RWSW223 – Lenovo Consumer Portfolio (45 minutes)
- RWSW224 – Lenovo AR/VR Smart Collaboration & IoT Solutions Portfolio (45 minutes)
- RWSW225 – Lenovo Gaming Portfolio (30 minutes)
- RWSW222 – Lenovo SMB & Education Portfolio (30 minutes)
- RWSW237 – Lenovo Commercial Accessories Portfolio (45 minutes)

- RWSW238 – Lenovo Consumer Accesories Portfolio (45 minutes
- RWSW229 – Lenovo Service (30 minutes)
- RWSW232 – Lenovo Resources (30 minutes)
- RWSV210r2 – Service Technicians Best Practices (90 minutes)
- CARW230 – Troubleshooting: Scientific Method (10 minutes)
- CARW231 – Troubleshooting: Lenovo Method (25 minutes)
- RWSW207r2 – Operating System Recovery (15 minutes)
- **RTPW11E0r2 – Lenovo Chromebook Service – RMA SHIM (60 minutes) *****
- RWSW234 – Bootbox Diagnostics and Resolute (30 minutes)
- CSWW209 – Windows BitLocker (30 minutes)

Highly Recommended ***

NGSP – Mandatory training for Users & Contacts (continue)
How to know if a technician is qualified

To confirm if a Technician is qualified, hover over your email address and click on Account Center.
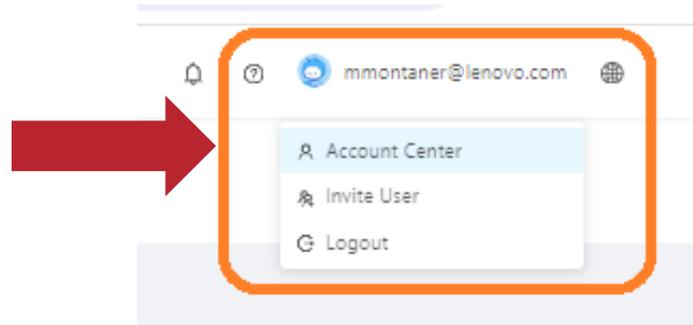
Within Relationship Management you will find a list with all your location´s contacts.

Enter data to narrow down your search

- ⓘ **If you enter any information in these fields, click on Search to narrow down your search.**
- ⓘ **If you manage various locations, make sure to filter by LOCID to see the contacts associated to a specific location.**
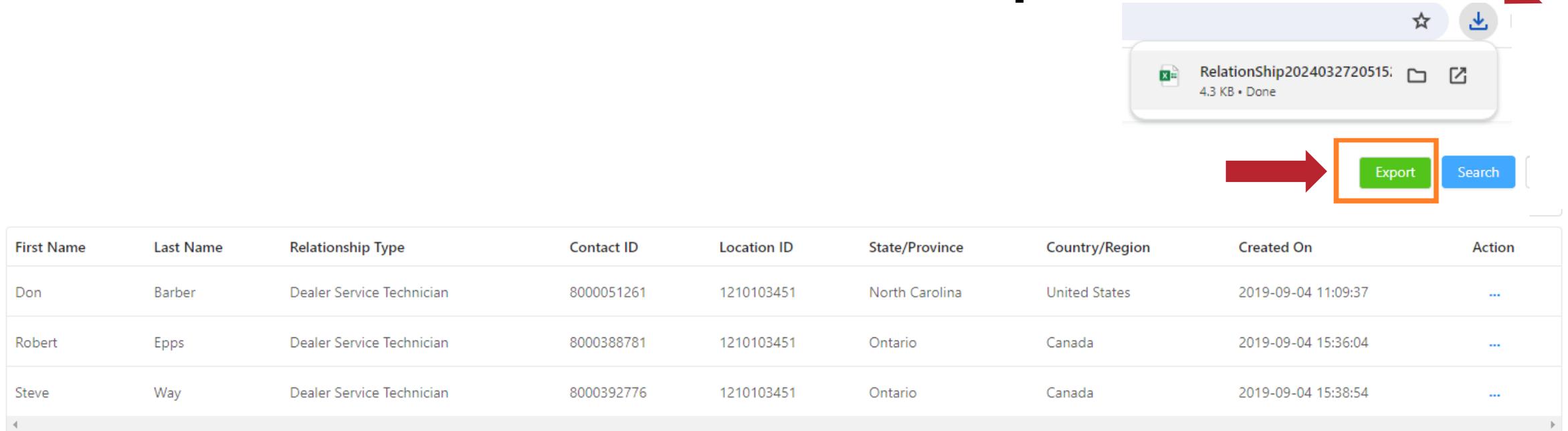
NGSP – Mandatory training for Users & Contacts (continue) How to know if a technician is qualified

RelationShip2024032720515:
4.3 KB • Done

Export   Search

First Name	Last Name	Relationship Type	Contact ID	Location ID	State/Province	Country/Region	Created On	Action
Don	Barber	Dealer Service Technician	8000051261	1210103451	North Carolina	United States	2019-09-04 11:09:37	...
Robert	Epps	Dealer Service Technician	8000388781	1210103451	Ontario	Canada	2019-09-04 15:36:04	...
Steve	Way	Dealer Service Technician	8000392776	1210103451	Ontario	Canada	2019-09-04 15:38:54	...

The best way to check qualifications is by clicking **Export**. Once the Excel file is downloaded, open it and go to Column O – Trainings. If the course **RASERVICE** is listed, **the technician is qualified to repair in-warranty machines**.
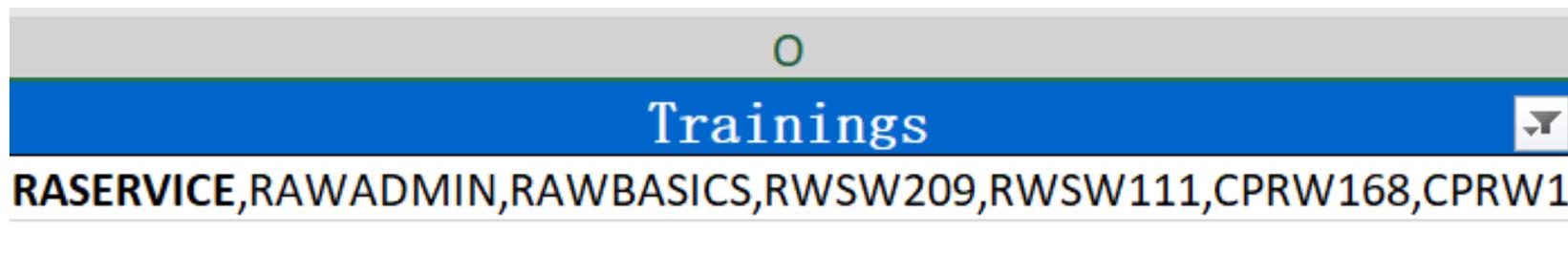
O

Trainings

RASERVICE,RAWADMIN,RAWBASICS,RWSW209,RWSW111,CPRW168,CPRW1

NGSP – Login

Once you complete your registration and click on **Save** you will be redirected to the **NGSP's login screen.** Alternatively, you can access it directly at **ngsp.lenovo.com**.

Click on **Login** for **All Service Partner Users**.
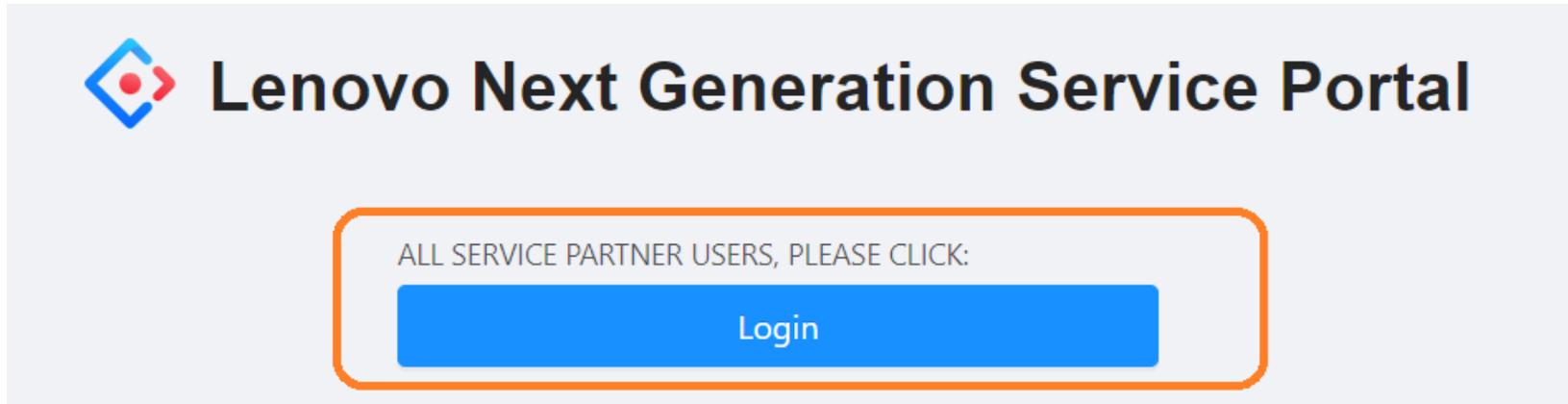
ℹ️ **Your user is the email account used to register.**

ℹ️ **When logging in for the first time, you will have a view only access. If you try to make any changes, you may receive an error message like the one shown below. To gain full access, please contact smsc@lenovo.com to request authorization for your user. Keep in mind that authorization depends on the completion of all mandatory courses.**

❌
Your account is waiting for authorization, please contact your Lenovo Rep to activate your account.

NGSP – Select location

Select your Location

If you are associated with only one location, it will appear at the top of the page. If you're associated with multiple locations, they will be listed in a drop-down menu. You can also search by typing your location's name or ID (LOCID) and then select the correct one.

ⓘ **It is important to select the right location before you start creating a case.**
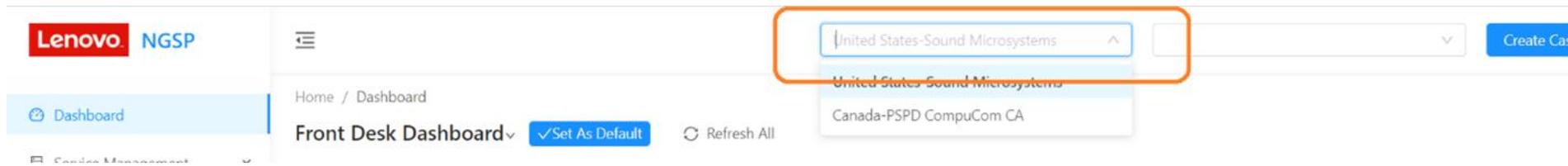
ⓘ If you are associated with multiple Location IDs, the system will remember your last session and display the information for the Location you last selected when you log in again.

NGSP – Dashboard

Your landing page will vary based on your user role, showing a different dashboard accordingly.

For ASP Admin & ASP Admin Level 2
- **ASP Admin Dashboard**
- **ASP Admin Dashboard (Multi-Location)**

ⓘ You may change your view to see one or several locations at a time (if applicable).
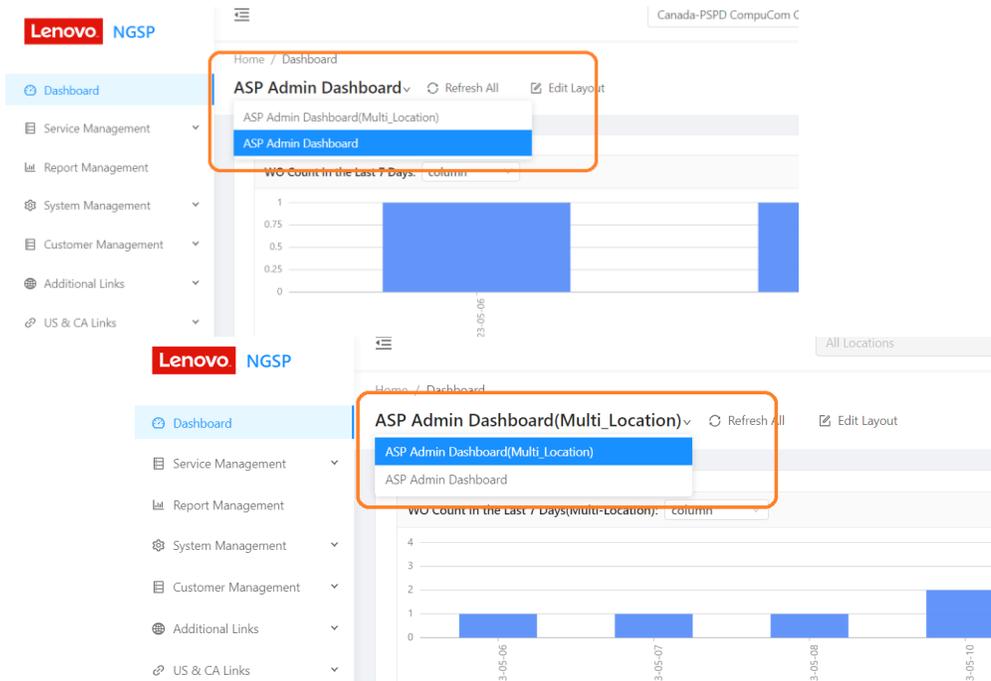
For ASP Technicians
- **Front Desk Dashboard**
- **Technician Workbench (defaulted)**

ⓘ You may change your default landing page by clicking on *Set as Default* for your preferred dashboard.

ⓘ *To view more detailed reports go to the Report Management section*

NGSP – Navigation Menu
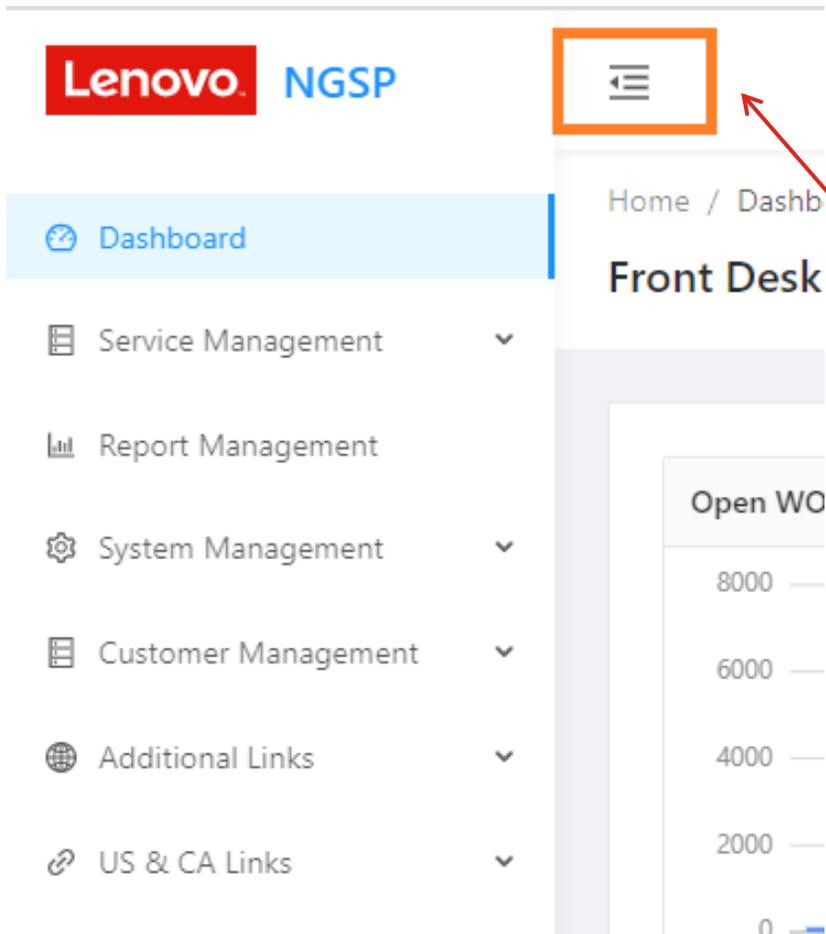
The **Navigation Menu** appears along the left side of every page.

By default, the menu sections are collapsed.

ⓘ Some sub-options in the menu are only visible to users with ASP Admin roles.

You can collapse this Menu by clicking on this icon.

NGSP – Search function and Notification Icon

To help you narrow down your search, the **Search Bar** offers **filters**

You can search by:
- Case number
- Work Order number
- Exact or Partial Serial Number.

If there are multiple search results, the system will display the 5 most recent ones.

If you see a **red circle** with a number on the Notification Icon, it indicates how many unread notifications you have. **Clicking the icon** will display your notifications, with the newest ones at the top. Each notification includes a date and time stamp.
Unread **notifications** appear in **bold**. Clicking on a notification will mark it as read and change the font style. You can also click **Clear All** to remove all notifications.

ⓘ **Exported reports that are ready for download will appear here.**

NGSP – Service Management

- In this **section**, you can create **Cases** and **Work Orders**, as well as perform other functions like checking Service History or Entitlement.

NGSP – Case view & create

In the **Case** view all cases associated with the selected location will be listed.

ⓘ **If you are associated with multiple locations, be sure to check which Location is selected at the top of the page..**

You can customize this view by selecting additional columns from the drop-down menu.

If you wish to look for a specific case, you can narrow down your search by:

Case number

Serial number

or add extra filters from the dropdown menu

Case

Case Number :		Serial Number :		Location :

Or Click the case number on the list

Click on Search

Filters ⌃   Search   Clea

Customer Name
Customer Email
Customer Contact Number
Case Type
Incoming Channel
Case Priority
External Reference Number
Case Status

Case Number	Location	Case Status	Case Priority	MTM	
2001529344	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW	
2001526595	1210100204 - PSPD CompuCom CA	New	Priority-3 (Med)	20Q1CTO1WW	
2001526457	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW	
2001525943	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW	PC1G3CDQ
2001525942	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW	PC1FKDHX
2001525944	1210100204 - PSPD CompuCom CA	WO Created	Priority-3 (Med)	20Q1CTO1WW	PC1G3CC3

NGSP – Case view & create (continue)

Create Case   ⓘ **Before clicking on *Create Case*, make sure the correct location is selected—if you're associated with multiple locations.**

Step 1: Entitlement

Enter the Serial Number in the *Serial Number field* and click on **Entitlement Check**.

For Option devices, select **Yes** on the Options field, fill in the MTM* and click on **Entitlement Check**.

ⓘ If the **Serial Number** has been previously serviced by your location, the system will display a **Duplicate Active Case and Work Order** warning. You can review the existing Case or Work Order by clicking on their name or number—each will open in a new tab. If you don't need to review them, simply close the message by clicking the **X**.

If applicable, you can continue working on an existing Case and/or Work Order.

NGSP – Case view & create (continue)

Repeat repair reason field will be mandatory if the ***Repeat Repair toggle*** is **Yes**.

ⓘ The **Repeat Repair** flag is applied at a Serial Number level. If any previous repair was performed on the same Serial Number, the system will automatically set the toggle to Yes. **This will not impact your reimbursement, if applicable.**

If your Location has previously serviced the Serial Number, the system will pre-populate your customer data. **This information can be changed if needed**.

MTM ⓘ :	20LNS1P700
Repeat Repair ⓘ :	Yes ◯
* Repeat Case Reason:	⌄

Click on **Next**.

Step 2: Customer Data

Fill in the Customer information; fields with a red asterisk (*) are mandatory.

(*) First Name:
(*) Last Name:
Company Name: This is the Customer's company name (if applicable)
Business Partner Number: Please leave blank.
House Number:
Customer ID: System will generate a customer ID number for later use.
(*) Customer Address1: This will be used as the Customer address in the *Repair Location* and *Part Ship-to Location* fields in your Work Order if customer value is selected.

Customer Address2:
(*) Customer City:
(*) State/Province:
(*) Country/Region:
(*) Customer Postal Code:
(*) Customer Email:
(*) Customer Contact Number: This is the Customer's phone number.

NGSP – Case view & create (continue)

Customers previously saved by your Location can be found by clicking on *Search Customer*.

On that screen, enter your customer's first name, last name, or Customer ID, then click *Search*.
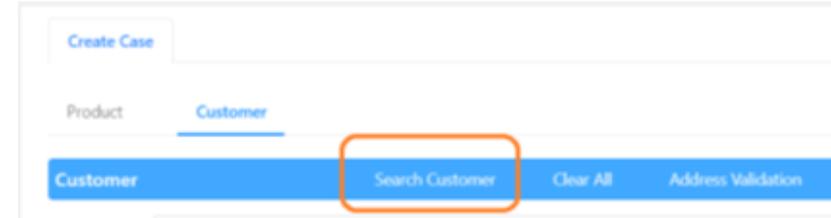
      ⓘ **The Customer ID** can be found in your Customer Management section within the Navigation Menu.

Saved customer records will be displayed. Select the correct one and click on **OK**. Otherwise, click on **Cancel**.

You can edit the information of a previously saved customer. The updated details will be saved and reflected in the Customer Management section within 24 hours.

We recommend always validating the address when adding a new customer by clicking **Address Validation**, as it may be used as the order's **Part Ship-to Location**.

Once ready, click on **Next**.
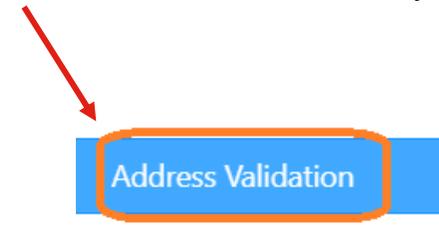
NGSP – Case view & create (continue)

Step 3: Case identification

Fields with a red asterisk (*) are mandatory to identify the case.
(*) Case Title:
(*) Problem Description:
(*) Used Lenovo Diagnostic Code: pre-set to **No**
(*) No Diagnostic Reason: please choose **BP** from the dropdown list.

Case Priority, Urgency, and Impact are **predefined fields**. Please do not modify them.
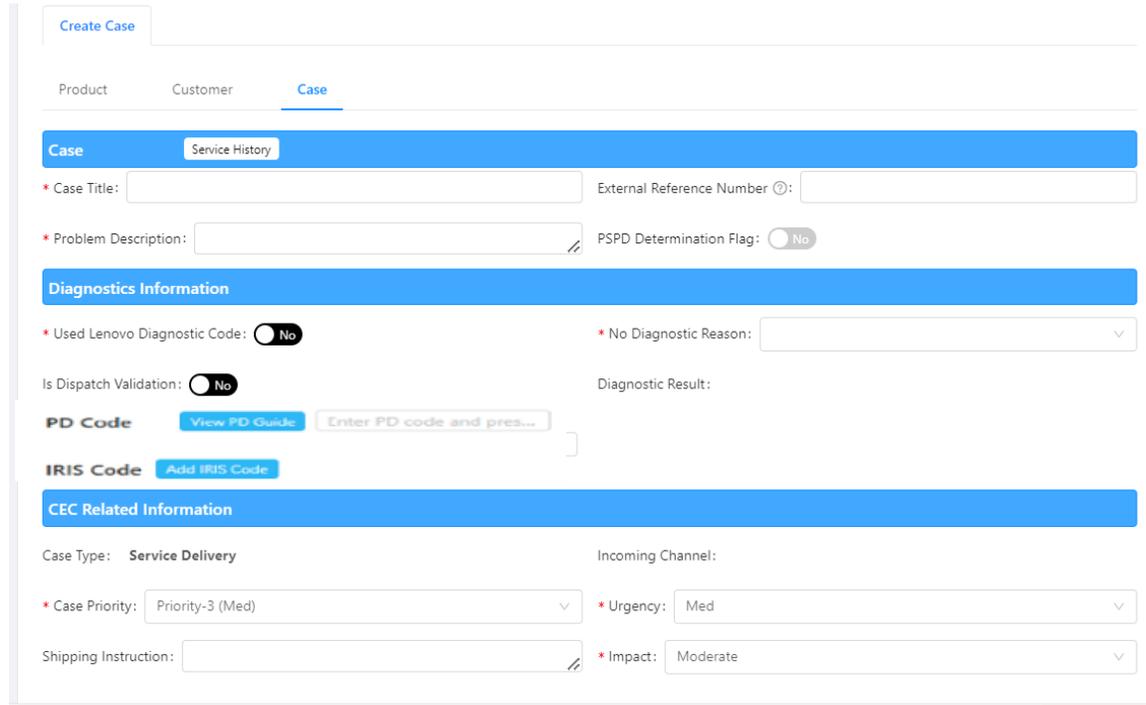
ⓘ **The information entered in the following fields during case creation will automatically carry over to the Work Order.**
(Does not apply to Batch upload work orders)

When ready, click on **Submit**.

CASE field	transferred to	WORK ORDER field
External Reference Number	info will be pre-populated in	External Reference Number
Problem Description	info will be pre-populated in	Diagnostic Notes
Repeat Reason	info will be pre-populated in	Repeat Reason

Notes: The information that is pre-populated in each work order can be manually edited by the partners if they need to change or add anything.

If a case has more than one work order, the information from these 3 fields will only be pre-populated in the first work order, not in any of the subsequent work orders created.

NGSP – Case created – What's next ? – Work Order

After Clicking on **Submit,** the case will be created.

2001507102   Case Status: New

1 Identify
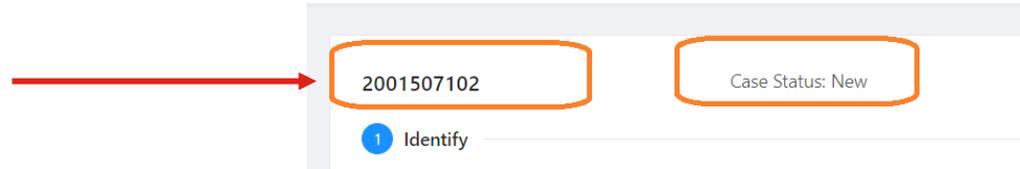
After the case is created, click **Create WO** in the bottom right-hand corner to create a Work Order.

POP Update   Create WO
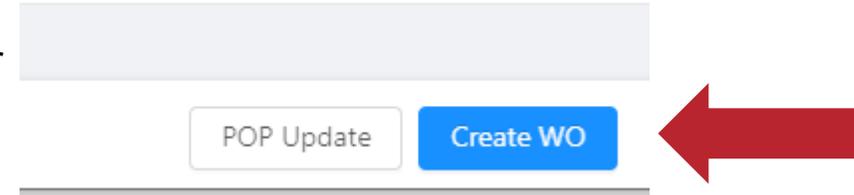
If you have an existing case, you can go to Cases & Work Orders view and click on **Create WO** in the "Next Best Action" column.

Use the Search Bar's sort and filter to find the case you need.

Cases & Work Orders

Create Case

Service Management

Case

Work Order

RMA

Cases & Work Orders

Service History

Batch Upload

Entitlement Check

Active - Case		Search by case number, work order number or serial number ...				Sort by: Case	

Case#	SN / External Ref #	WO # / Tech Name	WO / Order Type	Status	Aging Days	Next Best Action
2001511310 Title1	PC1FCE53 N/A	N/A N/A	N/A N/A	N/A 2023-02-05 21:08:01	N/A	Create WO
2001511309 Title1	PC1FCE53 N/A	N/A N/A	N/A N/A	N/A 2023-02-05 21:08:01	N/A	Create WO

NGSP – Work Order (continue)

Once you click **Create WO**, the Create Work Order page will open.

At the top of the page, you will find:

➢ Tabs with the original case information and any Work Orders created from that case.

➢ Name of the Work Order taken from the case.

➢ Jump links that take you to different sections of the page.

Tabs

Jump links

NGSP – Work Order (continue)

Fields with a red asterisk (*) are mandatory to create a new **Work Order**. Each step in the Work Order creation process will require different mandatory fields.

(*) **Work Order Type:** Always pick **AWSP**, if not prepopulated.

(*) **Order Type:** this is your **Service Type**. **NEVER select Machine DOA.**

- If **Engineering Change ECA** is selected, (*) ECA number field will appear.
- If **DOA** is selected, (*) Original DOA WO Number field will appear. **Enter Work Order number in which the defective replacement part was received.**
- If **Labor Only** is selected, (*) the Labor Only type field will appear. There are **4 types** of possible **Labor Only Work Orders**:
    - **ADP**: (*) Service Code to confirm the repair done will become a mandatory field.
    - **Standard**: (*) Service Code to confirm repair done will become a mandatory field.
    - **Software/Firmware**: (*) PD Code is mandatory. When entering it manually, format it as **PDT**HT002998, where **PDT must be added**, followed by the tip (**HT002998**).Alternatively, use the PD Tree button to select the code.
    - **CRITSIT**: (*) CritSit Case number will be mandatory.
- ⓘ **Order Type will be auto populated with "Options Claim" if you selected YES for Options in the case.**

Technician ID: Select your Service Technician from the drop-down list.

External Reference Number: This is a reference number of your choice, which will appear on your parts' packing list and shipping label as **BP Ref/BP Ref ID**. It's advisable to fill this field in. The character limit is 35.

NGSP – Work Order (continue)

Repeat repair reason: This field is mandatory only if the *Repeat Repair toggle* is set to **Yes**. Select the reason that best matches your repair. This will not affect your reimbursement, if applicable.

AWSP Repeat repair: tracks whether this is the first time your location has repaired the unit.

Repeat Repair Reason: **Part DOA**

Repeat Count: **12**

AWSP Repeat Repair: Yes

Repeat Repair ⑦ :   Yes

Part Ship To Location: **Customer**

Repair Location: **Customer**

(*) **Part Ship To Location:** choose from the down drop menu. There are 4 options:
- Customer
- Technician
- Dealer
- Alternate If chosen, a popup screen will appear so you can pick a saved address or enter a new one.

(*) **Repair Location:** This address is used for tax calculations. Even though it's not a mandatory field, **please make sure to always complete it.**

Repeat Repair ⑦ :   Yes

Repeat Count: 703

* Part Ship To Location: ∧

AWSP Repeat Repair: No

* Repair Location: Cus   5 Dorchester Ave,Boston,02122

Customer
Technician
Alternate
Dealer

Work Order Priority: **Medium**

Program:

Initial Diagnostics

KEY DATES

Actual Performed Date ⑦ :   Select date

NGSP – Work Order (continue)

Work Order Priority: Prepopulated based on the unit's entitlement. Do **NOT** modify this field.

Actual Performed Date: The date the repair was completed.

Diagnostic Note: This is your **Failure Description**. Please provide a **detailed problem determination** and the repair steps. This field is **mandatory** to complete the Work Order. Once completed, the Work Order becomes eligible for metrics calculations and labor reimbursement, if applicable.

Service Level Information
* Actual Service Type:

Actual Service Type (*) : This is your Service Delivery Type.
- **Onsite-FRU**: **Should only be selected if the unit is entitled**. If it is not entitled, system will regard repair as **Out of Warranty** and **it will be subject to review for possible invoicing.**
- **Bring In**: Former **Carry in**.
- **Parts only**: **Do not select this Actual Service Type unless expressly instructed by Lenovo.**

Repair Notes (*) **:** This field is where you can enter the **repair steps performed, any additional repair comments, and confirm that the repair was successful**. It is **mandatory** to complete the **Work Order**. Once completed, the Work Order becomes eligible for metrics calculations and labor reimbursement, if applicable.

Examples

Diagnostic Notes:

ADP (Accidental Damage Protection): Machine was dropped by the end-user. LCD cracked and left corner bezel damaged. The rest of the machine Is functional

Base Warranty: Some keys may malfunction and not work properly Technical tip applicable HT508078.

Repair Notes:

ADP (Accidental Damage Protection): LCD and Bezel replaced. Machine repaired successfully

Base Warranty: The 300e Chromebook keyboard replaced. I ensured the keyboard ribbon cable was not folded or bent as technical tip recommend. Machine repaired successfully.

NGSP – Work Order (continue)

Once all required fields are completed, the system will show a *Success* message, and **your Work Order number will be generated.**

If any mandatory field is missing, the Work Order number will not be generated, and **the system will highlight the incomplete field in red**.

ⓘ **You will get a pop-up warning if the technician selected is not qualified to perform the repair.**

Once your Work Order number is generated, you're ready to start ordering parts!

Your Work Order will be in **"Awaiting Order Release"** status.

Case Info	WO: 4005181095
WO Created	Awaiting Order Release

WO 4005181095
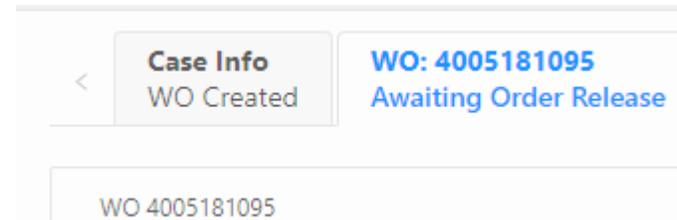
To order parts, click on **Edit WO** at the bottom of the screen to enter edit mode, then click on **Add Part**. The system will prompt a new window (see the example on the next slide).

Parts List　　　　　　　　　　　　　　　　　　　　Add Part　Part ATP

Item Line#	Requested Part/FRU	Status	Warranty	Part Tier	Part Tier Description	Return Part to Lenovo	Dispos
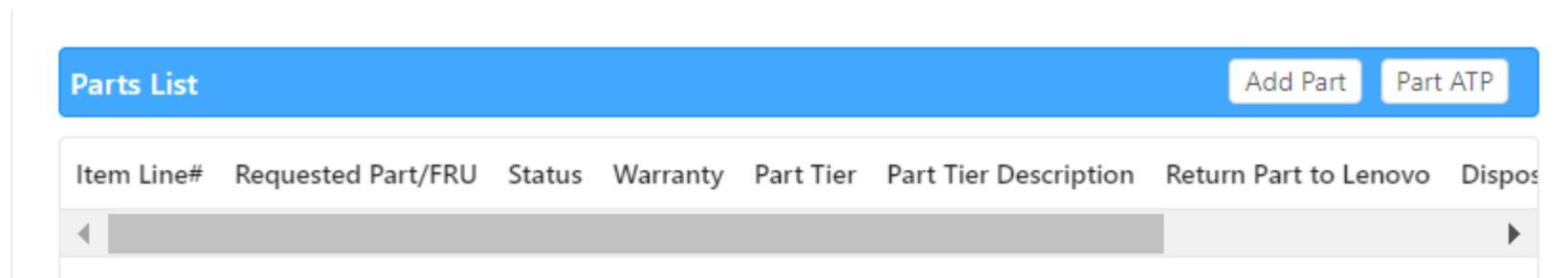
NGSP – Work Order (continue)

Machine information

Parts Search

Product

Serial Number: `PC1A4CM8`
MTM ⓘ: `20Q1CTO1WW`
MT: `20Q1`
Part ID:

You can enter part number.

* Country: `United States`
* Language: `English`
Include MT BOM parts:
CRU Only:
Commodity Category:

if you want to filter by commodity type, select from the drop-down list.

Clear Filters

AC ADAPTERS
ANTENNA
Rechargeable Batteries
Consumptive Bezels
RECHARGEABLE BATTERIES INTERNAL
BACKPLANE
BLUE TOOTH ADAPTERS
BEZELS/DOORS

Search

Then click on *Search*

Retrieved Products

BOM

☑	Serial Number	FRU	FRU Description	CRU Tier	CRU Tier Description	Bom Indicator	
+ ☐		02HL005	MECH_ASM A-Cover,Black,PPS,HD	9	FRU only	As Built	1
+ ☐		02HL009	MECH_ASM B-Cover,Black,w/Shutter	9	FRU only	As Built	1
+ ☐		01YU005	TRAY,SD,Black	1	CRU mandatory	As Built	1
+ ☑		01YU061	CS16_2BCP,MYLAR,BLACK,SUN	9	FRU only	As Built	1

You can also filter by any of the columns in this section by clicking the magnifying glass icon

To select a part from the **BOM**, check the box next to it, and it will appear in the **Selected Products list.**

Total: 39   1 2 3 4 5 6 7 8 ›   5 / page

Max 5 parts allowed per Work Order.

Selected Products

Action	Serial Number	FRU	FRU Description	CRU Tier	CRU Tier Description	Bom Indicator	Sellable Flag	Qty	C
Delete		01YU061	CS16_2BCP,MYLAR,BLACK,SUN	9	FRU only	As Built		1	C

Once you have selected the parts needed, click **OK**

Ok   Cancel

If you need to remove any part selected, click on **Delete**.

NGSP – Work Order (continue)

Your unit's **Build of Material (BOM) will be displayed**. To find a specific part, enter its number in the **Part ID** field and click **Search**.

You can filter by **Commodity Category** by selecting from the dropdown list, or filter any of the columns in the **Retrieved Products** section by clicking the magnifying glass icon.

Once you have found the part you need, click the checkbox next to it. All added parts will appear in the **Selected Products** section. In this screen, you can remove any incorrect parts by clicking **Delete**.

ⓘ Do **NOT order out of scope parts.** i.e.: Parts that are **not** listed in the unit's BOM.

ⓘ There is a **minimum of 1 part per Work Order**, except when Order type is **Labor only**.

ⓘ The **maximum** quantity allowed is **3 parts per Work Order for the US** and **Canada**.

Once you have selected all your products, click on **OK.** The system will take you back to the Work Order screen.

All parts added will be displayed in the **Products section** of the Work Order. If you missed a part, you can use the **Add Part** function again, keeping the maximum quantity allowed per country in mind.

ⓘ **If you've selected an incorrect part or one that shows as out of warranty (as explained in the next slide), click on Cancel WO and select only that part before clicking on Dispatch.**

> **AFTER YOU HAVE CLICKED *DISPATCH, DO NOT ATTEMPT TO CANCEL THE WO. IF YOU NEED TO CANCEL THE WO, OR A PART ORDERED, PLEASE CONTACT THE SMSC AT smsc@lenovo.com***

NGSP – Work Order (continue) – Parts out of warranty

Once the Case and Work Order have been created, and after selecting the parts, you will find a column named **Warranty** under the Parts List section. This column may display one of the following messages:
-      Base Warranty
-      Extended Warranty
-      Out of Warranty

If a part shows as **out of warranty**, you can cancel the specific item with the expired warranty and dispatch the remaining parts if they are covered under base or extended warranty.

Before clicking on Dispatch, you can select **Cancel WO** at the bottom of the page. You can either cancel all parts along with labor reimbursement or cancel only the specific part number.

If Dispatch has already been clicked, please contact the **SMSC** Team providing the **work order number, part number you wish to cancel, and the reason for the cancellation**. If the part has not been shipped, we will proceed with the cancellation request.
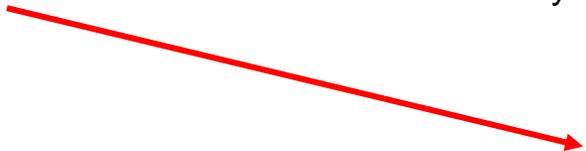**If the part has already been shipped**, you can return it **unused** and, if necessary, order a replacement by **creating a new work order**.

Parts List

Item Line#	Requested Part/FRU	Status	Warranty	Part Tier	Part Tier Description	Return Part to Lenovo	Disposition	Not in SBOM	Other Reason
20	5B10W67369 Lenovo BATTERY 3cell 42 Wh 11.25V	Pending Tgt Delivery 2024-02-06 02:00:00	Out of Warranty	9	FRU only	No			
30	5H51A14268 HINGE (L+R) B 81M9	Pending Tgt Delivery 2024-02-06 02:00:00	Extended Warranty	9	FRU only	No			

Services Provided

Repair Notes: dsa

Service

Line Order	SAP Service	Product Item Type	Accounting Indicator	Description	Work Order Service Status	Closing Code	Gross Price(Total)	Discount(Total)	Tax	Net Price(Total)	Action
10	CIAWSP2	FS Labor	Extended Warranty	AWSP Labor	Pending						delete

Save   X Cancel Wo   Dispatch

NGSP – Work Order (continue)

ATP Check

Once you have selected the parts you require, you can click on **Part ATP** to check the **Part's ETA**. The system will update the **Committed Delivery Date** as well as the **Shipped part # column**.

*You need to be on **Edit mode** to see the **ATP check** button*.

NGSP – Work Order – Cancel Work Order

Cancel Work Order

We recommend reviewing the Work Order carefully *before clicking on Dispatch*, to ensure the selected parts and technician are correct.

If you need to cancel a part: Click on *Edit WO*, then *Cancel WO*. A new window will pop up for you to select the part you wish to cancel. Choose the appropriate cancellation reason from the dropdown list and click *Initiate Cancellation*.

ⓘ **If you have already clicked on Dispatch, please do NOT attempt to cancel the WO yourself. Contact the SMSC (smsc@lenovo.com) for assistance.**

NGSP - Work Order - *Dispatch*

Once all mandatory fields are completed and all necessary parts have been added to the Products section, save your Work Order. Its status will then be set to **"Awaiting Order Release."**

You **MUST** click on *Dispatch* to **release the Work Order.** This action notifies Lenovo that your order is complete, and you are ready to receive the requested parts.

ⓘ **"Closing code is NOT mandatory for NA locations. LEAVE FIELD BLANK"**

ⓘ **To view the Dispatch button, you must first enter Edit mode. You can find the Dispatch button at the bottom left of your screen.**

Status will change to order released once *dispatched*

All mandatory fields have been completed

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NGSP – Work Order - *Statuses*

After clicking **Dispatch**, the Work Order and Product statuses will update. The standard sequence in the Product Status column is as follows:

Released → Accepted → Pick-Pack → Shipped → Delivered

When the **Product Status** column updates to **Delivered**, you may proceed with your repair.

NGSP - Create a new Work Order that automatically goes to Finish Repair

ONLY for WSMs & TPMs

Step 1 – Create the case, if it hasn't already been created.

Step 2 – Create the Work Order – **Besides the mandatory fields, make sure the following fields are completed before clicking on Submit. (example on next slides)**

- ➢ **Technician Name**
- ➢ **Actual Performed Date**
- ➢ **Diagnostic Notes**
- ➢ **Repair Notes**

Step 3 – After clicking on Submit, **click on Edit WO to add the parts needed, unless it is a Labor Only WO.**

Step 4 – The **Add Part** button will appear. Click on it to add the parts to your WO.

Step 5 – Once the parts have been added. Make sure **all the fields mentioned above are completed** then click on **Dispatch.**

> **After the Work Order is dispatched with all the required fields completed, the Labor line will be automatically updated to "FIXED", and the Work Order status will change to "Repair Completed".**

ⓘ **You might receive a warning message saying "Cannot move to next BPF". This is just a warning, and you can disregard it.**

NGSP - Create a new Work Order that automatically goes to Finish Repair

Work Order Info

Work Order Type: AWSP   Order Type: Customer Limited Warranty

* Technician Name: Joe Technician ← Technician Name   External Reference Number:

Exception Approval Code: Repeat Repair Reason: Unrelated Product Failure

Repeat Repair ⓘ : Yes   Repeat Count: 176

Part Ship To Location: Dealer   88888 888 SSSSS JJJJJJJ SSSSSSSSSSS SSSSS SSSSSSS,SSSSSSS, , SSSSSSS, 98104   AWSP Repeat Repair: No

Repair Location: Dealer   88888 888 SSSSS JJJJJJJ SSSSSSSSSSS SSSSS SSSSSSS,SSSSSSS, , SSSSSSS, 98104   Program:
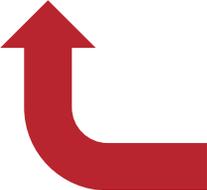
Work Order Type: *AWSP*

Order Type: Choose from the drop down menu.

Technician Name: Choose from the drop down menu.

Part Ship to Location: Choose from the Drop down menu based on the specific case.

Repair Location: Choose from the Drop down menu based on the specific case.

NGSP - Create a new Work Order that automatically goes to Finish Repair

Initial Diagnostics

KEY DATES

Actual Performed Date ⑦ : 2023-07-18 ← Actual Performed Date

PRODUCT INITIAL CONDITION

* Diagnostic Notes: Demonstration ← Diagnostic Notes

PD Code

IRIS Code

Service Level Information

Actual Service Type: BRING IN

Actual Service Level: Next Business Day

Actual Performed Date: enter *diagnostics date*

Diagnostic Notes: Fill in the following details:

- What happened to the machine?
- What is the problem?
- Is the problem physically evident?
- Is the machine still operational despite the issue?

Actual Service Type: Select from the drop-down menu, based on the specific case.

Actual Service Level: will be populated automatically when entering Actual Service Type

NGSP - Create a new Work Order that automatically goes to Finish Repair

Services Provided

* Repair Notes: Demonstration ← Repair Notes

Repair Notes: Fill in the following details:

- What needs to be done to fix the machine?
- What parts need to be replaced?
- What was the outcome of the repair?

Click **Submit** once done.

NGSP - Create a new Work Order that automatically goes to Finish Repair

After Clicking on Submit, the work order page will refresh
1. Click on **Edit WO**
2. The **Add Part** button will appear. Click on it to add the parts needed

NGSP - Create a new Work Order that automatically goes to Finish Repair

Parts List

Item Line#	Requested Part/FRU	Status	Warranty	Part Tier	Part Tier Description	Return Part to Lenovo	Disposition	Not in SBOM	Other Reason
20	01YN265 FRU USB Sub card	Pending Tgt Delivery 2023-07-20 13:39:18	Base Warranty	9	FRU only	No			

Service

Line Order	SAP Service	Product Item Type	Accounting Indicator	Description	Work Order Service Status	Closing Code	Gross Price(Total)	Discount(Total)	Tax	Net Price(Total)
10	CIAWSP2	FS Labor	Base Warranty	AWSP Labor	Pending					

Once the parts have been added, the **Service Line** will be populated automatically.

Before clicking on **Dispatch**, **Make sure all the fields are completed (as shown in previous slides)**. The **Finish Repair** will be processed without any further action required.

NGSP - Create a Work Order after repair has been completed that goes automatically to Finish Repair RECOMMENDED for ASPs

If a **warranty repair has been successfully completed** using authorized Lenovo parts —purchased by the Service Provider or "replenishment orders"— create the Work Order by following the steps below:

Step 1 – **Create** the case, if it hasn't been created.

Important: **Please review the customer survey preferences in the** case **to ensure that it is set to** YES, **before filling out the information listed in step 2 and clicking** on Dispatch. **It ensures that the survey will be sent.**

Step 2 – **Create the Work Order by filling in the required information in the following fields:**

|	
2.1 Order Type	**2.5 Actual Service Type**
2.2 Technician Name	**2.6 Diagnostic Notes**
2.3 Parts ship to Location	**2.7 Actual Performed Date**
2.4 Repair Location	**2.8 Repair Notes**

NGSP - Create a Work Order after repair has been completed that goes automatically to Finish Repair

Step 3 – After clicking on **Submit**, **click on Edit WO to add the parts needed, unless it is a Labor Only WO**.

Step 4 – The **Add Part** button will appear. Click on it to add the parts.

Step 5 – Once the parts have been added. Make sure **all the fields listed above are filled** then click on **Dispatch** to release the order. The **Finish Repair** will be processed without any further action required. Since all the order's fields were completed, the Labor line is automatically updated to FIXED, and the Work Order status will be **Repair Completed**
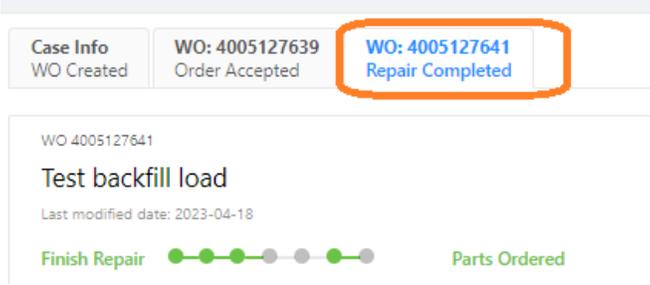
By following these steps, **once the "Finish Repair" has been processed, no further action is required on your end and the customer survey will be issued automatically.**

NGSP – Work Order – Finish Repair

When the parts ordered are delivered, the Work Order status will change to **In Repair**. After you have fixed the computer and before clicking on *Finish Repair*, click on *Edit WO* to **complete the Diagnostic Notes & Repair Notes fields**.

Diagnostic Notes (*) : This is your **Failure Description**. Please enter **full problem determination** and repair steps. This field is **mandatory** when creating the **Work Order**, but you can add new information if needed. Remember that this field becomes eligible for metrics calculations and labor reimbursement if applicable.

Repair Notes (*) : This field is where you can **enter repair steps performed and additional repair comments as well as confirm if the repair was successful**. This field is **mandatory** to complete the **Work Order.** By completing the WO, it becomes eligible for metrics calculations and labor reimbursement if applicable.

Clicking on *Finish Repair* will inform Lenovo that the customer has been taken care of, and the **Work Order** is **completed**.

ⓘ **It's essential that you click on *'Finish Repair'* to ensure labor reimbursement, if applicable. If this step is skipped, the Work Order will not be picked up for payment.**

Examples

Diagnostic Notes:

ADP (Accidental Damage Protection): Machine was dropped by the end-user. LCD cracked and left corner bezel damaged. The rest of the machine Is functional

Base Warranty: Some keys may malfunction and not work properly Technical tip applicable HT508078.

Repair Notes:

ADP (Accidental Damage Protection): LCD and Bezel replaced. Machine repaired successfully

Base Warranty: The 300e Chromebook keyboard replaced. I ensured the keyboard ribbon cable was not folded or bent as technical tip recommend. Machine repaired successfully.

Work Order status

All mandatory fields have been completed, Including:

(*) Diagnostic Notes

(*) Repair Notes

Must click on *Edit WO* to complete all the mandatory fields

To complete the Work Order, you **MUST** click on *Finish Repair*

NGSP – Part Dead On Arrival (DOA)

In the event of receiving a **DOA** (Dead on Arrival) replacement part, you will need to submit a **DOA Work Order** to re-order.

ⓘ **If the original case is still open, you can create the Work Order within it. If the case has already been closed, you'll need to create a new case using the same Serial Number and customer information.**

When completing the **Work Order**, make sure to **Select Order Type DOA** and to enter the "parent" work order in the **Original DOA WO number field**.

For the Repeat Repair Reason, select **'Part DOA'**. In the Diagnostic Notes section, provide details about the DOA issue and the steps taken to complete the repair.

ⓘ **Make sure that you use the same Actual Service Type as in the Original Work Order.**
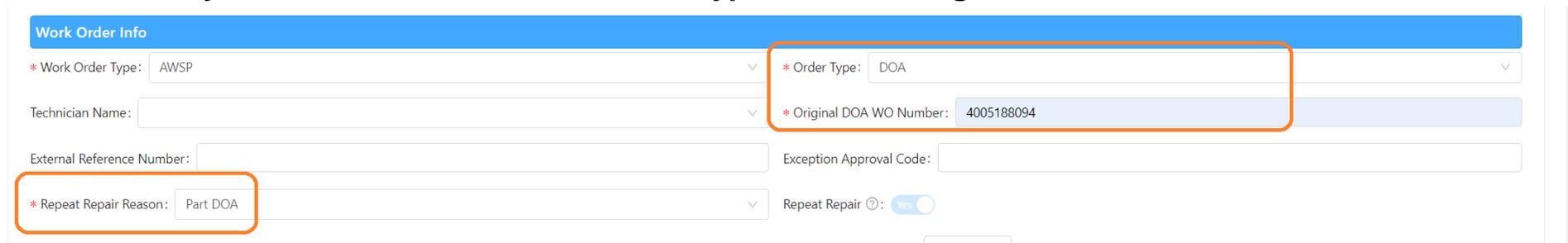
Once Work Order number has been generated, click on *Edit WO* and then on *Add Part.*

ⓘ **You can only order parts from your original Work Order if they were delivered within the past 30 days, in accordance with the Program's Terms and Conditions. If this timeframe has been exceeded, the order will not be dispatched and should be canceled.**

NGSP – Labor Only Work Order - PD Code

If you are placing a **Labor Only** order for Software or Firmware, **entering a PD Code is required**.

If you already know the Tip number, you can manually enter it in the following format: "**PDTHT002998**" — **where "PDT" must be added before the Tip** (HT002998). While your cursor is in the field, press Enter on your keyboard.

If you are unsure of the Tip, click on **Knowledge Base** to search for it manually. Once you've found the appropriate Tip, click on Copy to populate the field. After closing the popup screen, the **PD Code** will appear in the Work Order.

ⓘ **Failure to add a valid code will generate a hard-stop.**

ⓘ Pursuant to our Terms and Conditions, **Labor Only orders are subject to a manual audit**.

NGSP – Batch Upload

Batch Upload allows you to create **up to 50 cases and/or Work Orders** by uploading a single **Excel file**.

To upload a Batch file, go to **Service Management** in the Navigation Menu and select **Batch Upload**.

Go to *Click to Download Template* and choose **AWSP** from the drop-down menu.

NGSP – Batch Upload

Note: The batch template varies depending on your role.

For **ASP Admin** and **ASP Admin Level 2** roles, who may manage multiple locations within one batch file, an extra column (Column B) is included. In this column, you need to enter the LOCID and the name of the location.

For the **ASP Technician** role, there is no extra column, since **they can only have one location in one batch file.**

ⓘ If you're unsure how the location name is displayed, you can find it in the **Case** or **Work Order** view under the **Location** column. Make sure to enter the location name in the correct format with no spaces, using the format **"SAPID-team name".** For example, if the location is 123456789 – Lenovo testing, you must enter 123456789-Lenovo testing.
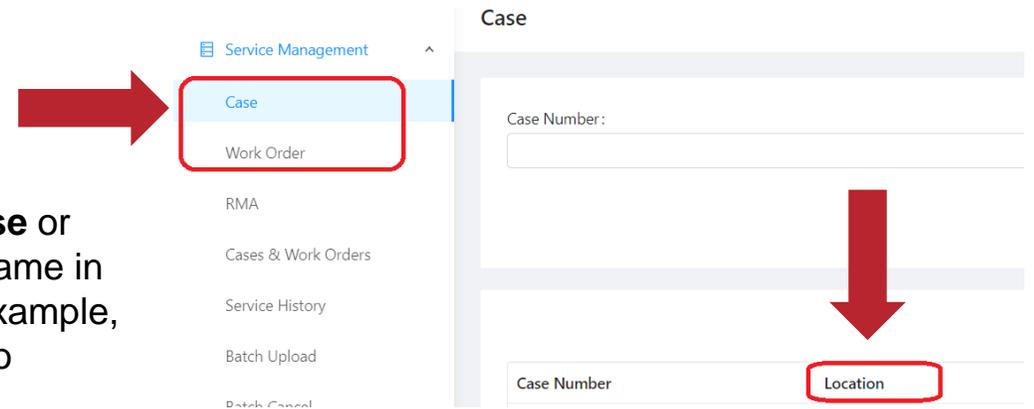
NGSP – Batch Upload

Once you open the template:

Begin by enabling the Macro

Select your **Geo** (doing this, hides unnecessary columns for your GEO!)

**Pay attention to columns color indication ** **

** See next slide

DO NOT DELETE, NOR CHANGE LINES 1 TO 4

Begin filling out the file starting from line 5

Number the rows in sequence (Only the rows that have been filled out)

Row 4 contains quick description of the information to enter

We recommend to select Accepted

ⓘ **Each row corresponds to a separate Work Order**
ⓘ **If the customer information is saved, enter it using their assigned customer ID.**
Otherwise, multiple customer records will be generated for the same customer.
ⓘ **Some fields are for manual input, while others provide a drop-down menu.**

NGSP – Batch Upload

**

color indication:

green: definitely to be present; blue: conditional; yellow: optional;

orange: result fields

All the **green** color cells MUST be filled out

Serial Number

Blue color cells are conditional to fill out **if needed**, for instance, in this case if requesting an Option must indicate so.

Options

Yellow color cells are optional, except for the Survey Preference (shown below) that must be filled out with a **YES**

Survey Preference

Orange color cells are result fields, populated automatically, except for the **BPF column*****

Order General		
Case Number	Work Order Number	BPF

NGSP – Batch Upload

***After completing the file, it is **recommended to fill out the BPF column**. You have two options to select from the drop-down list:
- **Accepted:** This means you are ready to receive the parts. There is only one step left, which is to click **Finish Repair** once the machine has been repaired.
- **Finish Repair**: This should be selected **ONLY** if no part is needed due to a Labor Only Work Order or if the part requested is simply to replenish your parts stock.
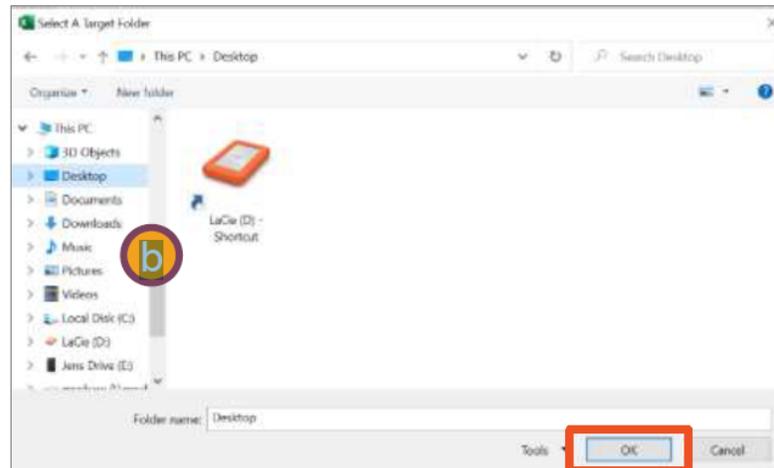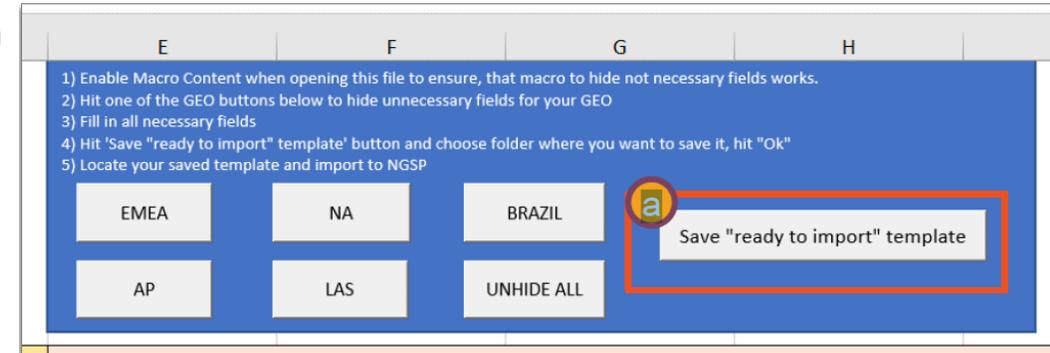
Once the BPF column has been completed
a. Click on *Save "ready to import" template* in the blue box.

b. Choose the folder where you want to save your file. Then click **OK**.

c. Click **OK** in the confirmation window to close it.

***file name will be "batch_upload_template."**
Feel free to change it after being saved.

NGSP – Batch Upload

NGSP offers a way to catch major errors in your file before uploading it. The **Simulation (validation)** feature mimics the import process without actually creating any *NGSP* records.

To run a Batch Simulation

a. Click *Batch Upload* in the Navigation Menu.

b. Click *Import*. The Import dialog opens.

c. Click on *Click to Upload*. A system dialog opens for you to select the file and click *Open*. This uploads the file to **NGSP**.

d. Click on the *Simulate* button in the pop-up window.
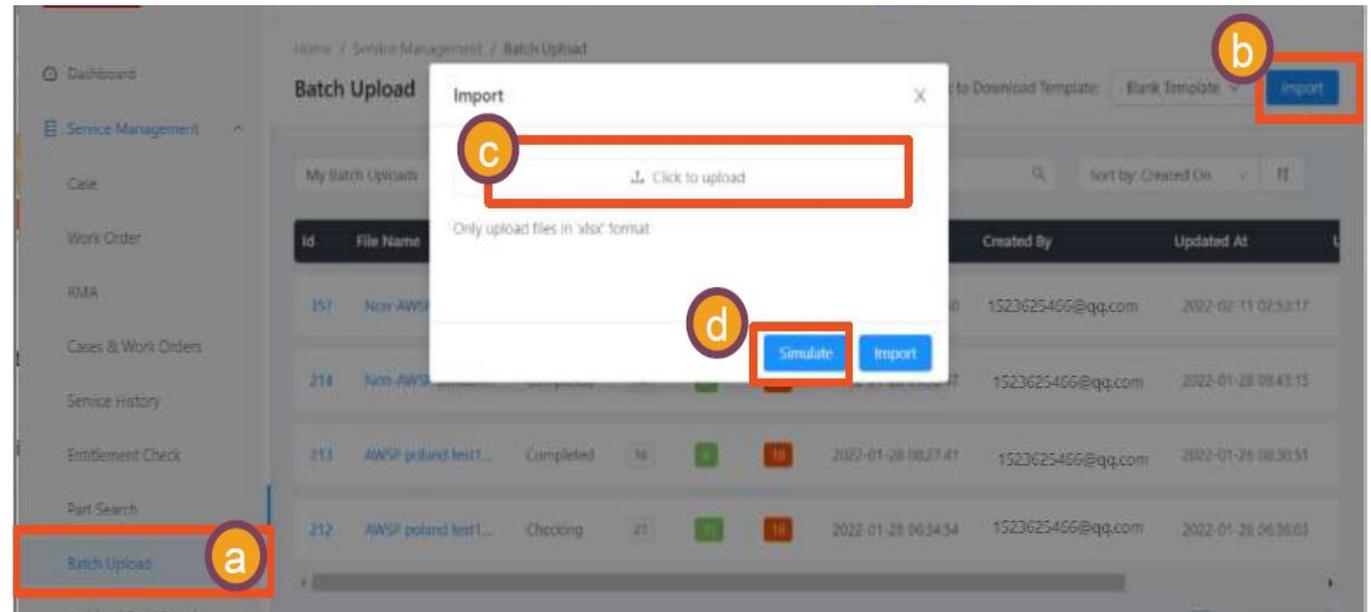
NGSP – Batch Upload

The file is uploaded and is available in the **Batch Upload screen**.

Status

Batch ID and name

Number of lines processed, and how many have succeeded or failed

Action to take, *Submit or Results*

ⓘ We recommend clicking on the ID number to view the simulation results or clicking on **Results** to download the simulation results before clicking on **Submit**.

You can download the file uploaded by clicking on its name.

NGSP – Batch Upload

When you open the Results file, you will see that it is in a **Master Template format.**

The first column, **Error Message**, will display all error messages or warnings for any records that failed to process correctly.

If you need to make any corrections to your file, you will need to upload your corrected template and run Simulation again.

Once you are satisfied with your file, click on **Submit.**
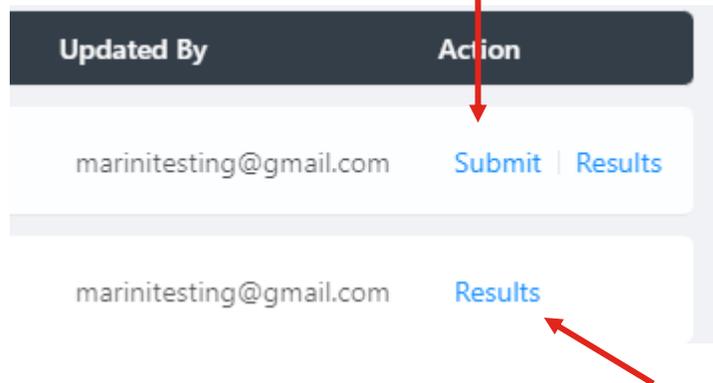
If you have already clicked on **Submit**, you can click on **Results** to export generated **Cases and Work Order numbers**.

NGSP Batch Upload – *Finish Repair*

Once you have repaired your customer's machines, you must select *Finish Repair* to complete the Work Order. There are two options:

OPTION 1

You can complete each Work Order **individually** (one at a time) by opening the Work Order screen. Click on the specific WO to open it, **ensure the Repair Notes field is completed**, and then click **Finish Repair** to mark it as **Completed**.

Work Order Status

Action to take

NGSP Batch Work Order – *Finish Repair*

OPTION 2

➢ You can do it by **batch**, downloading a **new Batch Template**. For each Work Order you want to complete, fill out the following columns: **Work Order Number**, **Repair Notes**, and select **Finish Repair** in the BPF column.

➢ After completing these columns for each WO, you can upload the file and in the *Batch Upload screen* under **Action** click on **Submit**

NGSP – Report Management

- There is a section on the left-hand side menu called **Report Management** where you can find all reports available for download.

There, you will see three tabs:

My Watched: this is the default tab, and initially the list is empty. You can fill it with reports you wish to monitor by clicking on the star next to the report name in the All tab.

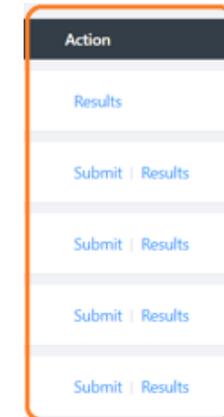**All:** This tab contains all available reports. If you click on the star next to a report, it will be added to the My Watched tab.

Settings: This tab contains the ECA Determination report and the Performance report.

If you select the 3-dot ellipsis under the **action** column of a report, a few actions appear in a menu.

They are:

- **View Setup** (where available)

- **View Report**

NGSP – Report Management – Customize & Export

- After clicking on **View Report**, the report will open. You can customize the displayed columns by selecting options from the drop-down list

You can also export most of the reports, by clicking on the **Export** button.

Clicking this button prepares the report for export to a file, which will then be available for download.

A success message will appear.

Once the export is ready, the notification number will increase by 1. Open the notification to view the new alert regarding this report export

Use the **click here** link to download the report to your computer.

NGSP – Report Management – Claim Awaiting POP report

The **Claim Awaiting POP** report can be accessed from the All tab, or from the My Watched tab if you have favorited it.

This report displays all Work Orders where the POP Status field is marked as **POP Required, POP Submitted,** or **POP Rejected.**

It allows you to track all Work Orders where the Unit, Part, or Labor is **Out of Warranty**.

If the **POP Status** column displays **POP Rejected**, you may return to the Case (within 30 days) and resubmit a POP, ensuring that the concerns listed in the **POP Rejected Reason** column are addressed.

NGSP – Report Management – Daily Part Shipment report

- The **Daily Part Shipment** report can be accessed from the All tab, or from the My Watched tab if you have favorited it.

- **This report provides details on all Work Orders together with their Part line items, allowing you to view comprehensive Parts information.**.

- This report serves as a replacement for the daily report that was previously sent via email.

ⓘ Once you click on *View Report*, you can customize it by selecting the information you wish to include from the drop-down list. The following columns may be of interest to you:

Home / Report Management

Report Management

| My Watched | All | Settings |

Report Name:

Report Name

Source Table:

Filters | Search | Clear All

Columns

	Report Name	Source Table	Visualization Type	Action
★	Claim Awaiting POP	WorkOrder	DATA	...
★	Payment Report	WorkOrder	DATA	...
★	Daily Part Shipment	ProductParts	DATA	...

Total: 3 < 1 > 10 / page

- ✓ Work Order Number
- ✓ Product Description
- ✓ Requested Part
- ✓ Dates (Shipment Date, Return by Date, Delivery dates, etc)
- ✓ Part Tier

- ✓ Returnable indicator
- ✓ Waybill numbers (Shipping and Return)
- ✓ Work Order Created by
- ✓ Technician id
- ✓ Return by date

NGSP – Report Management – Payment Report

- The **Payment Report** can be accessed from the All tab, or from the My Watched tab if you have favorited it.

- This report provides details for all Work Orders in **Closed** status, regardless of whether payment has been processed.

- This report replaces the monthly report that was previously sent via email.

You can **Export** it, by clicking on the *Export* button.

You may use the **Search** options at the top to narrow down your search.

NGSP – Report Management – Payment Report (continue)

Columns of Interest

- Closed Date
- Actual Labor Amount
- Total Net
- Gross Total
- Paid Date
- Bank Confirmation No.

Payment processing begins on the **3rd of each month**, following the closing date of a Work Order. To check what should have been paid, **refer to the Closed Date column**. Payment amounts will be displayed once the Work Order has been approved for payment.

For **Canada**, taxes will appear under the respective columns (**Tax HST, Tax PST, Tax GST/VAT, Tax QST**) once the Work Order is approved for payment. The final amount will be listed under the **Gross Total** column.

For **US**, the final amount will be listed under the **Gross Total** column.

Scroll to the far right to view the **Paid Date** and **Bank Confirmation No**. columns. This information will be visible within the week following payment.

Business Partner Number	External Reference Number	Case#	WO#	WO Create Date	Service Complete Date	Closed Date	Submitter Email	Submitter Name	Order Type	Actual Service Type
1210181008	1680058549.100534	2001522153	4005194232	2023-03-28 21:56:27	2023-03-28 21:56:16	2023-03-29 21:01:33	# NGSPUpdate_Dev-MsdSync	MsdSync	Accidental Damage Warranty	LABOR ONLY
1210181008	1680058562.2976267	2001522154	4005194241	2023-03-28 21:56:27		2023-03-29 20:15:36	# NGSPUpdate_Dev-MsdSync	MsdSync	Options Claim	ADVANCE EXCHANGE
1210181008	1680058599.5293894	2001522167	4005194245	2023-03-28 21:57:28	2023-03-28 21:57:04	2023-03-29 20:01:29	# NGSPUpdate_Dev-MsdSync	MsdSync	Machine DOA	LABOR ONLY
1210181008	1680058600.9862297	2001522168	4005194246	2023-03-28 21:57:28	2023-03-28 21:57:09	2023-03-29 20:01:43	# NGSPUpdate_Dev-MsdSync	MsdSync	Offline Billing	LABOR ONLY
1210181008	1680058648.986461	2001522169	4005194248	2023-03-28 21:58:27	2023-03-28 21:57:55	2023-03-29 20:01:31	# NC			
1210181008	1680058653.9224896	2001522170	4005194249	2023-03-29 22:02:05	2023-03-28 21:58:02	2023-03-29 20:01:45	# NC			
1210181008	1680058665.5338285	2001522172	4005194250	2023-03-28 21:58:27	2023-03-28 21:58:12	2023-03-29 20:01:40	# NC			

...fied	POP Status	Actual Labor Amount	Total Net	Tax:HST(Local)	Tax:PST(Local)	Tax:GST/VAT(Local)	Tax:QST(Local)	Gross Total	Paid Date	Bank Confirmation No.	Travel (Local)

NGSP – Report Management – Pay for Performance (PFP) report

The PFP Report can be accessed from the **Settings** tab. It allows you to track your performance and replaces the **Scorecard** you may have been familiar with.

The report shows **Monthly and Quarterly Scorecards** by single Location ID.

You can change the **Location ID** by selecting a new one in the drop-down menu and then clicking on **View Scorecard**.

You also have the option to Print, using the **Print preview** button, or to **Download** this report to your computer.

Report Management

Report Name	Source Table	Visualization Type	
PFP Report	PFP Report	DATA	View Report ...
ECA Determination	ECA Determination	DATA	...

ⓘ **If you have questions about the content in this report, please reach out to your dedicated Service Consultant.**

PFP Report — Location ID: 1210181008-United States-Sound Micro...

Country: United States
Vendor Name: Sound Microsystems
Address: 88888 888 SSSSS JJJJJJ SSSSSSSSSSS SSSSSS SSSSSSS,SSSSSSS. SSSSSSS Washington 98104

Monthly Scorecard

Month	February-2023	January-2023	December-2022	November-2022	October-2022
All Completed Claims		268	4053	272	269
Std. Wty. Claims		212	1888	180	211
Projected PFP %					
FTF %		94.74%	94.31%	97.16%	94.74%
FTF % Std. Wty. Unique Serial #s		209	1863	176	209
FTF % Std. Wty. MCLM Ser#s		11	106	5	11
PPM			1	1	1
PPM Std Wty Parts Used		213	1911	176	213
PPM Std Wty Unique Serial #s		209	1863	173	209
Std Wty Labor Reimb		13780			
Std Wty Travel Reimb		10600			
Projected PFP Bonus Reiumb					
Non Std Wty Labor Reimb					
Non Std Wty Travel Reimb					
Total Reimb w/o PFP					
Total Reimb with PFP					
ADP Claims		55	2126	86	55
Labor Only Claims		0	0	0	0
Option Claims		0	0	0	0
DOA Claims		3	39	6	3
ECA Claims					

Quarterly Scorecard

Quarterly Scorecard	Q4-2022	Q3-2022	Q2-2022	Q1-2022	Q4-2021
All Completed Claims	269	269			
Std. Wty. Claims	211	211			
Projected PFP %					
FTF %	0.9474	0.9474			
FTF % Std. Wty. Unique Serial #s	209	209			
FTF % Std. Wty. MCLM Ser#s	11	11			
PPM					
PPM Std Wty Parts Used	213	213			
PPM Std Wty Unique Serial #s	209	209			
Std Wty Labor Reimb					
Std Wty Travel Reimb					
Projected PFP Bonus Reiumb					
Non Std Wty Labor Reimb					
Non Std Wty Travel Reimb					
Total Reimb w/o PFP					
Total Reimb with PFP					
ADP Claims	55	55			
Labor Only Claims	0	0			
Option Claims	0	0			
DOA Claims	3	3			
ECA Claims					
Pre-Cust Claims					
Parts not Returned with 30 days					
PCT not Returned with 30 days					

NGSP – Report Management – ECA Determination report

The **ECA Report** can be accessed from the **Settings** tab**. This report allows you to look up all the ECA numbers**.

You can search by

- ECA Number
- Machine Type (MT)
- Machine Type Model (MTM)
- Effective Date
- or you can add more filters from the drop-down menu.

NGSP – Report Management – ECA Determination report (continue)

a. You can use the "Order by" icon to arrange the table by values in that column.
b. You can also use the magnifying glass icon to filter by values in a column.
c. At the bottom of the page, you can select which page of the report you wish to see.

ⓘ **If you would like to find out more details about the ECA selected, copy the number. You can then click on the links in the Navigation Menu to access the Support pages for further information.**

NGSP – Return Merchandise Authorization (RMA)

If you have ordered a **Returnable part,** you can view parts pending Return in the **RMA** report within **Service Management**.

ⓘ **No action is required here; this report is simply for you to quickly check if you still need to return a part to Lenovo.**

Bear in mind you have **30 days to return parts back to Lenovo**. If you **require a return extension or a new return label**, please contact the **SMSC (smsc@lenovo.com).**
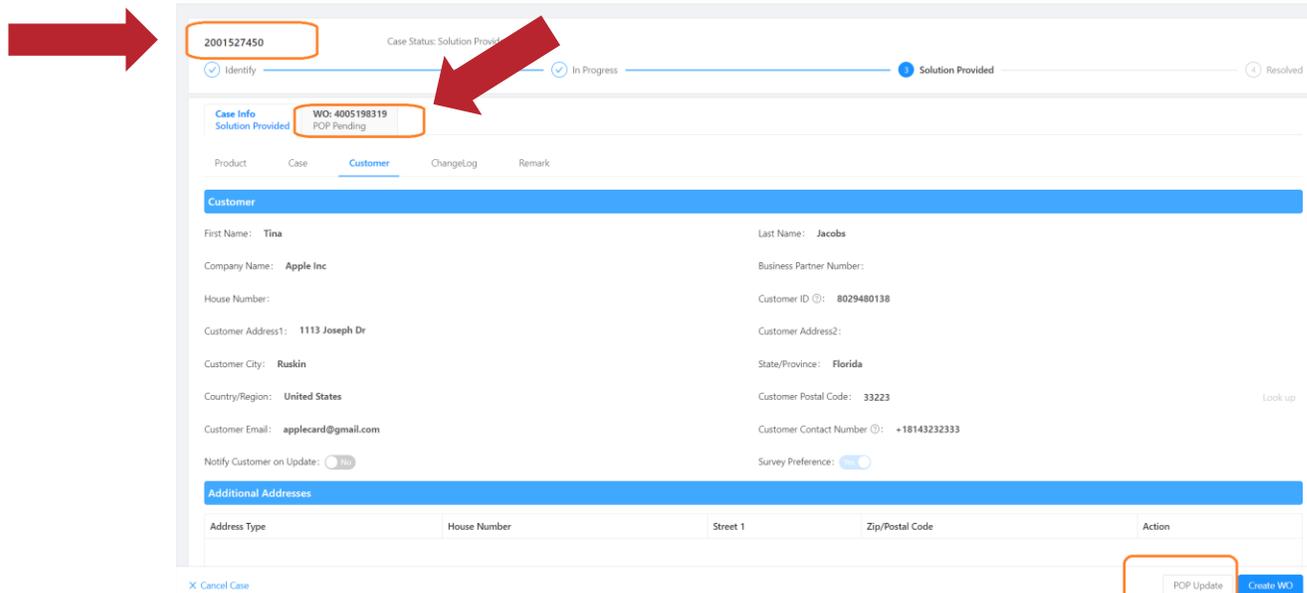
NGSP – Uploading Proof of Purchase (POP)

If you have submitted a Work Order for a unit that is **no longer under warranty**, system will display a **POP required** message.


WO 4005186405

ow test

Last modified date: 2023-02-02

Finish Repair ●━●━●━●━○━○━●━○   POP Required

ⓘ If your unit's entitlement shows expired in our system buy you have a POP to validate that your unit is under warranty **we recommend** reaching out to our **Registration teams** thinkpls_us@lenovo.com or thinkpls_ca@lenovo.com to correct entitlement records before creating the **Case and/or Work order.**

If you have already created the **Work Order**, please go to the **Case** and click on *POP Update* to upload your file.
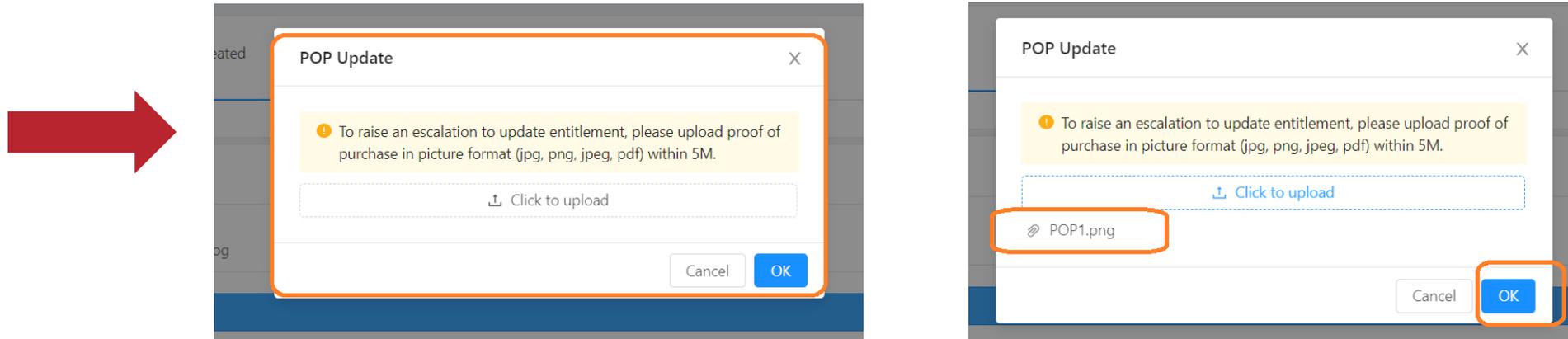

ⓘ **The POP no longer needs to be sent to the SMSC via email for its approval; it is now uploaded directly in the case**
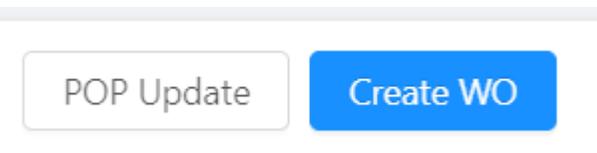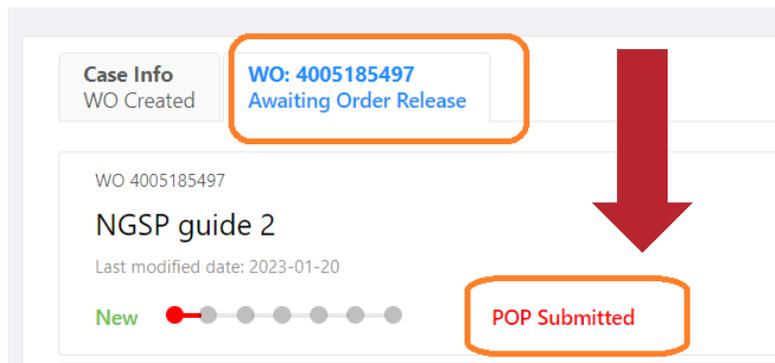
NGSP – Uploading Proof of Purchase (POP) - continue

A popup screen will appear, click on "Click to upload" to add your POP. Once it has been uploaded, click on **OK.**

To verify that it has been uploaded successfully, go back to the **Work Order** and check the status of the **POP**.
It should read **POP Submitted**

ⓘ **Orders that require a POP will remain in "Awaiting Order release" status. Once an SMSC agent reviews and approves the uploaded POP, the unit's entitlement information will be updated. You will then receive an email notifying you that you can dispatch your order to receive the parts.**

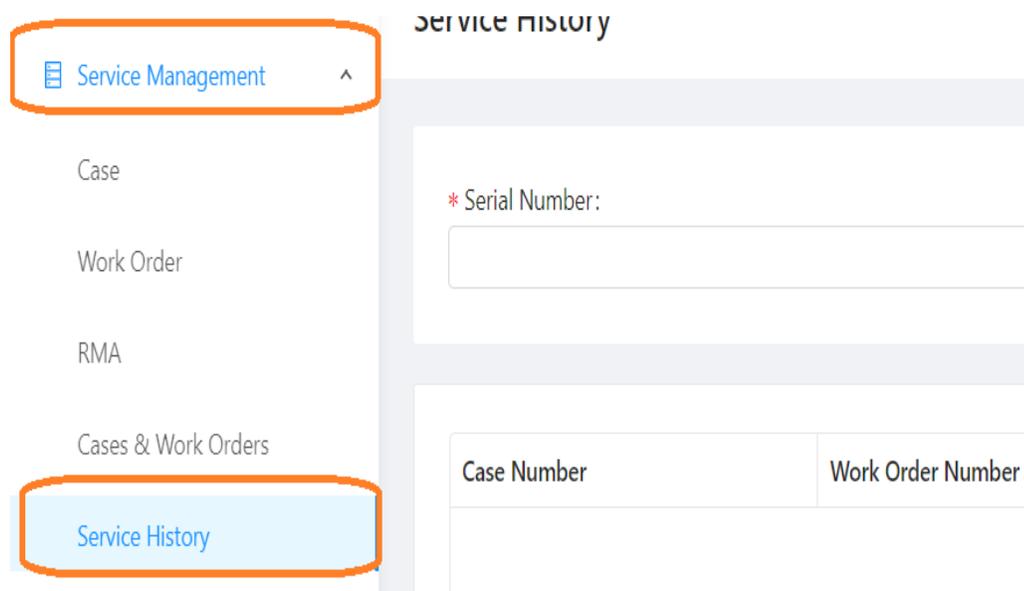# NGSP – Uploading Proof of Purchase (POP) - continue

ℹ **You can monitor all Work Orders that require a POP by viewing the *Claim Awaiting POP* report within Report Management.**

NGSP – Service History & Entitlement Check Queries

a. The **Service History** section provides a quick way for you to view the Service History for any Serial Number or MTM.

b. The **Entitlement Check** section provides a quick way for you to view the entitlement (authorization) for any Serial Number or MTM.

After running entitlement check, you can click on Create Case to continue working.
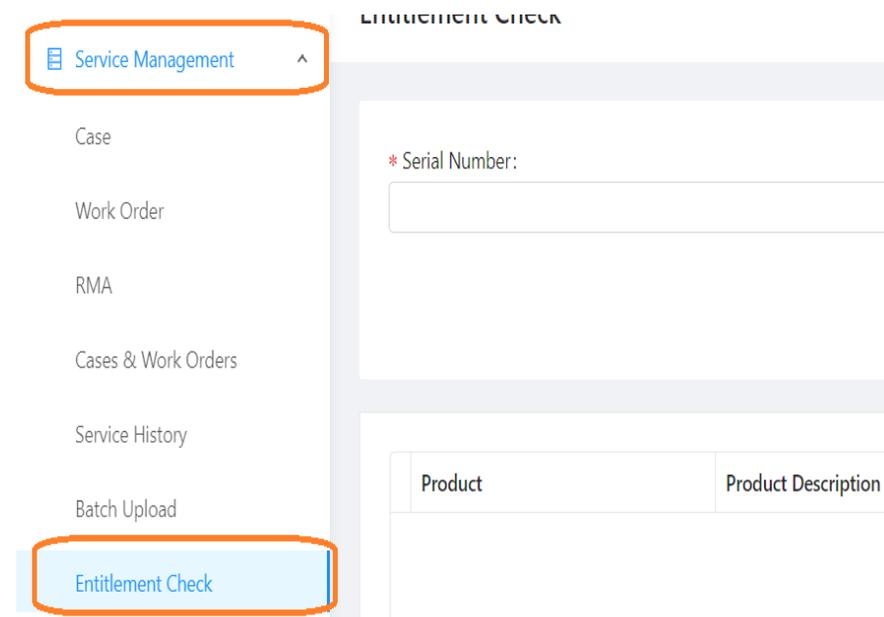
NGSP – Additional Support

- ## Service Management Support Center – SMSC

Provides administrative support to North American Self-Maintainers and Service Providers enrolled in the Authorized Warranty Service Provider Program.

Their website offers detailed operational procedures, tutorials, videos, and service guides for non-technical issues.

Contact information:

Email: smsc@lenovo.com

Phone: 800 426 3391

Website: https://smsc.lenovo.com/

ⓘ **To have access to the SMSC website, each AWSP location must use its unique Lenovo ID. If you haven't created one yet, please contact the SMSC.**

- ## Dedicated Service Consultants

Brenda Parker (bparker@lenovo.com)	Scott Harris (harrissa@lenovo.com)
Charles Coryell (ccoryell@lenovo.com)	Michelle Phillips (mphillips1@lenovo.com)
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ⓘ **If you are unsure which Service Consultant is assigned to your location, please reach out to the SMSC.**

thanks.