Warranty claims and maintenance visits

Customer support

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Customer support

Warranty claims and maintenance visits

Handle products under warranty and record service visits to customers.

Intermediate · About 20 minutes · Version 1.0 · Updated 17 November 2026

Plan availability

Available with the **Customer Support** add-on, which any plan can add. Contact us to add it.

Overview

Customers who bought a product with a warranty may bring it back for repair. A **Warranty Claim** records the claim, and a **Maintenance Visit** records a technician's visit to a customer.

Prerequisites

Products you sell with serial numbers, if you want automatic warranty checks. See Batches and serial numbers. Set the **Warranty Period (in days)** on the item.

Steps

Warranty claim

1. Search for **Warranty Claim** and click **Add Warranty Claim**.
2. Choose the **Customer** and the **Serial No**. The system shows the warranty status and expiry.
3. Describe the **Issue** and any **Resolution** later.
4. Save. Update the **Status** from *Open* to *Closed* once resolved.

Maintenance visit

1. Search for **Maintenance Visit** and click **Add Maintenance Visit**.
2. Choose the **Customer**, the **Maintenance Type** (*Scheduled*, *Unscheduled* or *Breakdown*) and the **Maintenance Date**.
3. In **Purposes**, add the item serviced, the **Work Done** and the technician.
4. Mark the **Completion Status**, then submit.

Scheduled servicing

For customers on service contracts, create a **Maintenance Schedule** listing the items and how often they are serviced. It generates visits and reminders.

Practical example

A customer returns a generator three months after buying it. The support team enters its serial number in a warranty claim, sees it is within the 12-month warranty, and books a visit. The technician replaces a part and records it under *Work Done*.

Important notes

- Check the warranty terms and expiry before promising free repair.
- Keep the replaced parts and costs on the record, so you can claim back from the supplier.
- Charge for work outside the warranty with a normal sales invoice. See Creating a sales invoice.

Common mistakes

- Selling products without serial numbers, so warranty cannot be verified.
- Not closing claims once repaired.

Next steps

Return to Logging and resolving customer issues.

Related documentation

- Logging and resolving customer issues
- Batches and serial numbers
- Moving and maintaining assets