Creating a Warranty Status

Warranty Status refers to the current state of a product's warranty claim or warranty coverage. It helps track where a request stands in the warranty process—from submission, review, approval, repair/replacement, up to completion or closure.

This also clearly defined triggers, actions, and next steps to ensure efficiency, transparency, and timely communication with both internal teams and customers. Automated notifications and logs are in place to maintain accountability and improve reporting.

Please see the attached video, which provides a detailed overview of Creating a Warranty Status.

Follow these Steps in Creating a Warranty Status: **Creating a Warranty Status.pdf**

1. Click **"Administrative Tasks"**
2. Click **"Warranty Status"**
3. Click **"New Warranty Status"**
4. Please select the **Color** you would like to use for the color coding.
5. Ensure that the Warranty Status **Name** field is completed with the correct and relevant information.
6. Please enter your desired **Description**.
7. Please enter your desired **Comments**.
8. Here you can see that the new Warranty Status you created is now available.

Follow these Steps to navigate and use Warranty Setting: **Creating A Warranty Status (Warranty Settings).pdf**

1. Click **"Administrative Tasks"**
2. Click **"Warranty Status"**
3. Click **"Warranty Settings"**
4. On **"Warranty Status"**
5. Please select your desired status.
6. Click **"Save Setting"**

Tips for Warranty Activity:

1. **Define Clear Statuses**
   - Each stage should have a specific, unambiguous name (e.g., Pending, Under Evaluation, Approved, In Progress, Completed).
   - Avoid vague terms like "Processing" without context.

2. **Assign Responsibilities**
   - Clearly indicate which team or individual is responsible at each status.
   - This prevents confusion and ensures accountability.
3. **Set Triggers for Each Status**
   - Determine what action or event moves a claim from one status to another.
   - Example: “Under Evaluation → Waiting for Approval” occurs when verification is complete.
4. **Automate Notifications**
   - Notify customers and internal teams at key stages to keep everyone informed.
   - Automation reduces delays and manual follow-ups.
5. **Include Sub-Statuses or Tags**
   - Use sub-statuses like “Awaiting Parts” or “Escalated” for better tracking of complex cases.
6. **Provide Customer-Friendly Names**
   - For any customer-facing system, use simple, clear terminology they can understand.
7. **Track and Log Changes**
   - Every status change should be timestamped and logged for auditing and reporting purposes.
8. **Monitor Turnaround Time**
   - Track the time spent in each status to identify bottlenecks and improve efficiency.
9. **Keep Statuses Consistent**
   - Use the same terms and workflow across all products and teams to avoid confusion.
10. **Review and Improve Regularly**

- Periodically evaluate the workflow to ensure it aligns with operational needs and customer expectations.

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