issuetrak

The Modern Warranty Workflow Template

How a Claim Moves Through the "Perfect Path" in Issuetrak

Phase 1

Standardized Intake (The "No-Guess" Form)

- User Action: Customer or Field Tech opens the Custom Web Form.
- Issuetrak Feature: Mandatory Fields

☐ Serial Number / Lot ID (Required for verification)
☐ Date of Failure
☐ Photo Upload (Field for visual evidence)
☐ Machine Hours/Cycles (Usage data)

Phase 2

Automated Validation & Triage

- System Action: The Assignment Engine triggers.
- Issuetrak Feature: Logic-Based Routing

☐ IF Issue = "Electrical" → ASSIGN to Lead Electrical Engineer.
☐ IF Customer = "Tier 1 Priority" → NOTIFY Account Manager immediately.
☐ IF "Urgency" = "Line Down" → SET SLA Alert for 2-hour response.

Phase 3

Investigation & Internal SOPs

- Team Action: Technicians follow a standardized checklist.
- Issuetrak Feature: Task Groups

- [ ] Verify Warranty Status (Link to original Asset record)
- [ ] Perform Remote Diagnostics (Log notes in the ticket)
- [ ] Approve/Deny Claim (Dropdown selection)
- [ ] Authorize RMA/Shipping (Trigger warehouse task)

Phase 4

Resolution & Customer Feedback

- System Action: Closing the loop.
- Issuetrak Feature: Automated Notifications

- [ ] Customer receives: "Your replacement part [Serial #] has shipped via FedEx [Tracking #]."
- [ ] Survey sent: "Was your warranty claim handled efficiently?"

Phase 5

The Quality Feedback Loop

- Management Action: Monthly review of aggregate data.
- Issuetrak Feature: Trend Reporting

- [ ] Report: "Top 5 Failing Components in Q4."
- [ ] Outcome: Engineering identifies a faulty vendor part, preventing 500 future failures.