



WHITE PAPER

# From Complaint to Closure: Warranty & Claims Management in ERPNext

How ERPNext turns an after-sales complaint into a tracked Warranty Claim — linked to the exact serial number, its warranty and AMC status, a resolution, and a Maintenance Visit.

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For service & after-sales leaders · 8 min read

## EXECUTIVE SUMMARY

The sale is the easy part. What tells a customer whether they'll buy from you again is what happens the day something goes wrong — the phone call, the complaint, the wait for someone to take ownership. For businesses that sell serialised products under warranty or an AMC, that after-sales moment is usually where the system of record goes quiet: complaints live in inboxes and WhatsApp, nobody's sure whether the unit is still under warranty, and resolutions are never written down. ERPNext closes that gap with a purpose-built Warranty Claim — a document in its Support module that ties a customer complaint to the exact serial number and item, pulls in that unit's warranty and AMC status automatically, tracks the claim through Open, Work In Progress and Closed, records who resolved it and how, and spins up a Maintenance Visit when a technician needs to attend. This paper walks that flow from the real ERPNext doctypes — the Warranty Claim and the warranty fields carried on every Serial No — so you can see exactly what the software does for you, and what discipline it still takes to run after-sales well.

## The after-sales moment that decides repeat business

Selling a product is a promise that it will work — and that if it doesn't, you'll make it right. For most businesses the machinery for keeping the first promise is excellent and the machinery for keeping the second barely exists. A customer calls with a fault, and the complaint lands wherever the call was answered: a support inbox, a WhatsApp thread, a note on someone's desk. Nobody can say for certain whether the unit is still under warranty, when it was sold, or what its serial number was. The resolution, if it comes, is never written down anywhere the next person can find it.

That gap is expensive in ways that don't show up on an invoice. Genuine in-warranty repairs get argued over because nobody can prove the dates; out-of-warranty jobs get done for free because nobody checked. Repeat faults on the same unit are invisible because each complaint is handled fresh. And the customer — who remembers exactly how the last complaint went — quietly decides whether to buy from you again.

ERPNext addresses this with a dedicated document in its Support module: the Warranty Claim. It exists precisely to turn a loose complaint into a tracked record, anchored to the specific unit that failed and to the warranty terms that unit actually carries.

- Complaints scattered across inboxes, calls and chat — no single record of who owns what.
- No reliable way to confirm whether a unit is in or out of warranty at the moment of the call.
- In-warranty repairs argued over; out-of-warranty repairs given away — because nobody checked the dates.
- Repeat faults on the same unit stay invisible when every complaint is handled from scratch.

## Warranty and AMC live on the serial number

Everything good about after-sales in ERPNext starts one step earlier — at the point of sale, on the serial number. In ERPNext every individually tracked unit is a Serial No record, and that record carries its own warranty and AMC details. When you sell a serialised item, the unit's Warranty Period (in days) flows from the item master, and ERPNext works out the Warranty Expiry Date for that specific unit. If the customer takes an Annual Maintenance Contract, the AMC Expiry Date is recorded on the same serial number. A Maintenance Status field then classifies the unit as Under Warranty, Out of Warranty, Under AMC or Out of AMC — a live, per-unit answer to the only question that matters when a complaint comes in.

This is the quiet foundation the whole claims process rests on. Because the dates and status live on the serial number — not in someone's memory or a sales file — the moment a customer quotes their serial number, ERPNext already knows whether that unit is covered, and until when. There's no digging through invoices to reconstruct the warranty; the unit carries its own history.

The discipline it requires is upstream: serial numbers have to actually be captured at sale, and warranty periods have to be set correctly on the item masters. Get that right once and every downstream complaint is answered with a fact instead of an argument.

- Every serialised unit is a Serial No record carrying its own Warranty Period (days) and Warranty Expiry Date.
- AMC Expiry Date is stored on the same serial number when the customer takes a maintenance contract.
- A Maintenance Status field classifies each unit: Under Warranty, Out of Warranty, Under AMC or Out of AMC.
- The prerequisite is upstream discipline — capture serial numbers at sale and set warranty periods on item masters.

The screenshot shows the ERPNext interface for a Warranty Claim. The breadcrumb trail is: Support > Warranty Claim > SER-WRN-2021-00001. The search bar contains "Search or type a command (Ctrl + G)". The user is logged in as "BS". The company name is "Innovative Chemicals Inc." with a red "Open" button. The "Maintenance Visit" button is active. The "Item and Warranty Details" section is expanded, showing the following fields:

Field	Value
Item Code	Premium Plastic Chair Set
Item Name	Premium Plastic Chair Set
Description	Premium Plastic Chair Set
Warranty / AMC Status	Under Warranty
Warranty Expiry Date	05-31-2023
AMC Expiry Date	

*Item and warranty details fetched from the serial number — the Warranty / AMC Status and expiry dates appear automatically, so coverage is confirmed at a glance.*

## Raising a Warranty Claim: complaint, serial number, coverage

When a customer reports a fault, you create a Warranty Claim. At its core it captures three things: the customer, the serial number of the failed unit, and the complaint itself — the issue as the customer describes it — along with the issue date. That's the whole entry burden: identify the unit and write down

what's wrong.

What happens next is where the earlier discipline pays off. Enter the serial number and ERPNext fetches the item details automatically — the item code, name and description — and, crucially, pulls the warranty and AMC picture straight from that serial number: the Warranty / AMC Status (Under Warranty, Out of Warranty, Under AMC or Out of AMC), the Warranty Expiry Date and the AMC Expiry Date. The person taking the complaint doesn't have to know whether the unit is covered; the form tells them. That single automation is what stops the two classic errors — charging for a repair that was covered, and giving away one that wasn't.

The claim carries a Status that begins at Open and a naming series so every claim has a clean, findable reference. Customer contact details, service address and territory populate from the customer record, so a field technician has an address to attend without a second round of phone calls. From the very first save, a scattered complaint has become a numbered, coverage-aware record with an owner.

- Capture the customer, the serial number and the complaint (the issue) with its issue date.
- The serial number auto-fetches item code, name and description — no re-keying product details.
- Warranty / AMC Status, Warranty Expiry Date and AMC Expiry Date pull from the serial number automatically.
- Status starts at Open with a naming-series reference; contact, service address and territory fill from the customer.

## A Warranty Claim, end to end in ERPNext

1

### Sale

the unit is captured as a Serial No carrying its Warranty Period, Warranty Expiry Date and (if sold) AMC Expiry Date.

2

### Complaint

a customer reports a fault; you raise a Warranty Claim with the customer, the serial number and the issue.

3

### Coverage check

the serial number auto-fetches item details and the Warranty / AMC Status, so cover is confirmed on the spot.

4

### Work in progress

the claim moves Open -> Work In Progress while the fault is dealt with.

5

### Maintenance Visit

when a technician must attend, a Maintenance Visit is generated from the claim and linked back to it.

## 6

**Closure**

the Resolution (what was done, by whom, when) is recorded and the claim is Closed, building the unit's service history.

The screenshot displays the ERPNext interface for a Warranty Claim. The breadcrumb trail is 'Support > Warranty Claim > SER-WRN-2021-00001'. The page title is 'Innovative Chemicals Inc.' with a red 'Open' status indicator. A search bar at the top right contains the text 'Search or type a command (Ctrl + G)'. Below the title, there are navigation buttons: 'Maintenance Visit', '<', '>', and 'Save'. The main content area is divided into sections: 'Assigned To', 'Attachments' (with an 'Attach File' button), 'Reviews', 'Shared With', and 'Tags'. The 'Status' field is set to 'Open', 'Customer' is 'Innovative Chemicals Inc.', 'Issue Date' is '05-24-2021', and 'Serial No' is 'SN-1001'. The 'Issue' field contains the text 'Specification issue with the item delivered.' Below the issue field, there are social interaction buttons: '0' likes, '0' comments, and a 'FOLLOW' button. At the bottom, there are two status indicators: 'You edited this just now' and 'You created this just now'.

A Warranty Claim in ERPNext — the customer, the serial number of the failed unit, the issue, and a one-click button to raise a Maintenance Visit.

## Resolving the claim and closing the loop

A complaint that's logged but never resolved is just a tidier version of the same problem. ERPNext moves the Warranty Claim through a clear set of statuses — Open when it's raised, Work In Progress while it's being dealt with, and Closed once it's resolved (or Cancelled if the claim isn't valid). Anyone can see, at a glance, where every open claim stands.

When the job is done, the resolution is captured on the claim itself — not in a separate note that gets lost. A dedicated Resolution section records the Resolution Details (what was actually done — repaired, replaced, part swapped), who Resolved it, and the Resolution Date. ERPNext stamps that resolution date automatically when a claim is closed without one, so the timeline is honest even when a technician forgets to fill it in. The result is a permanent, per-unit service history: the next time that serial number comes up, the last resolution is right there.

This is what turns after-sales from a black hole into an asset. Every closed claim adds to the record of how a product actually behaves in the field, which units are troublesome, and how quickly your team responds — the raw material for warranty-cost analysis, quality feedback to production, and an honest answer to 'how are we doing on service?'

- Statuses tell the truth: Open -> Work In Progress -> Closed (or Cancelled) — visible for every claim.
- The Resolution section records what was done, who resolved it, and when — on the claim, not in a side note.

- Closing a claim without a resolution date stamps one automatically, so timelines stay honest.
- Each closed claim builds a per-serial service history — the basis for warranty-cost and quality analysis.

## When a technician has to attend: the Maintenance Visit

Plenty of claims are settled from the desk — advice, a replacement dispatched, a part couriered. But many need someone on site, and that's where the Warranty Claim connects to the rest of ERPNext's service machinery. Directly from a claim you can generate a Maintenance Visit — the document that records an actual service call: who attended, what they found, what they did, and whether the work was fully completed, partially completed or left unresolved.

The link runs both ways and it's deliberate. The Maintenance Visit remembers which Warranty Claim it came from, so the site visit and the original complaint stay joined up. ERPNext even guards the sequence: it won't let you cancel a Warranty Claim while a submitted Maintenance Visit is still attached to it — you have to deal with the visit first — so the audit trail can't be quietly broken. For businesses with AMCs, the same Maintenance Visit doctype is the shared thread between reactive warranty work and planned preventive service, so a unit's whole service life — contracted visits and fault call-outs alike — reads as one continuous history.

- Generate a Maintenance Visit straight from a Warranty Claim to record an on-site service call.
- The visit captures who attended, what was found and done, and the completion status of the work.
- The link is two-way: the Maintenance Visit remembers its originating Warranty Claim.
- ERPNext blocks cancelling a claim while a submitted visit is attached — the audit trail stays intact.

## Getting it right — and where a partner helps

The Warranty Claim is not a complicated document, and that's the point: the value comes not from the form but from the discipline around it. The prerequisites are upstream and unglamorous. Serial numbers have to be captured at the point of sale, or there's nothing for a claim to anchor to. Warranty periods have to be set correctly on item masters, or the coverage the form reports is wrong. And someone has to own the queue — moving claims from Open to Closed, writing resolutions properly, and generating Maintenance Visits when a call-out is needed — because a status that never changes is worse than no status at all.

Where it gets worth a partner's help is at the joins: wiring serialised sales so warranty data reliably lands on every unit, connecting warranty claims to AMC maintenance schedules so contracted and reactive service share one history, and building the reports that turn a pile of closed claims into something a manager can act on — warranty cost by product, recurring faults, response and resolution times. As an official ERPNext partner working with Indian businesses, that's the work we do: not just switching the module on, but setting up the whole after-sales chain — serial numbers, warranty terms, claims, maintenance visits and the reporting over them — so that from the customer's first complaint to its final closure, nothing falls through the cracks.

## KEY TAKEAWAYS

- 1 ERPNext's Warranty Claim (in the Support module) turns a loose after-sales complaint into a numbered, tracked record anchored to the exact serial number and item that failed.
- 2 Warranty and AMC data live on the Serial No — Warranty Period, Warranty Expiry Date, AMC Expiry Date and a Maintenance Status — so coverage is a per-unit fact, not a guess.
- 3 Raising a claim auto-fetches item details and the Warranty / AMC Status from the serial number, ending the two classic errors: charging for covered repairs and giving away uncovered ones.
- 4 Claims move Open -> Work In Progress -> Closed, with the resolution (what was done, by whom, when) captured on the claim — building a permanent per-unit service history.
- 5 A Maintenance Visit can be generated straight from a claim and stays linked to it; ERPNext even blocks cancelling a claim while a submitted visit is attached, keeping the audit trail intact.

## FAQ

### **Does ERPNext automatically know if a product is still under warranty?**

Yes, provided the groundwork is done. Warranty details live on each unit's Serial No record — the Warranty Period (in days), the Warranty Expiry Date, the AMC Expiry Date and a Maintenance Status (Under Warranty, Out of Warranty, Under AMC or Out of AMC). When you raise a Warranty Claim and enter the serial number, ERPNext fetches that status and the expiry dates automatically, so whoever takes the complaint can confirm coverage on the spot rather than digging through old invoices.

### **What's the difference between a warranty and an AMC in ERPNext?**

Both are tracked on the serial number, but they're separate. The warranty is the coverage that comes with the sale, driven by the Warranty Period on the item and expiring on the Warranty Expiry Date. An AMC (Annual Maintenance Contract) is a paid service contract the customer takes, with its own AMC Expiry Date. The Maintenance Status field reflects which applies — a unit can be Under Warranty, Out of Warranty, Under AMC or Out of AMC — so your team always knows on what basis a repair is being handled.

### **How does a warranty claim connect to a service visit on site?**

Directly from a Warranty Claim you can generate a Maintenance Visit — the ERPNext document that records an actual service call, including who attended, what was found and done, and whether the work was fully or partially completed. The Maintenance Visit stays linked to the claim it came from, and ERPNext won't let you cancel a claim while a submitted visit is still attached. For businesses running AMCs, the same Maintenance Visit doctype ties reactive warranty work and planned preventive visits into one service history per unit.

### **Can we see a service history for a specific unit we sold?**

Yes — that's the payoff of anchoring everything to the serial number. Because each Warranty Claim records the serial number, the issue and its resolution, and because Maintenance Visits link back to their claims, a unit accumulates a full history: what went wrong, when, what was done and by whom.

That per-unit record is the basis for spotting recurring faults, analysing warranty cost by product, measuring response and resolution times, and feeding real field quality data back to your production or purchasing team.

**Talk to a real ERPNext expert.**

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