

Warranty & Service Contract Tracker

One row per serial number. Each cover type gets its own end date, the sheet works out days left, and a 90/60/30/7 touch plan tells you what to do next. Works in Excel, Google Sheets and LibreOffice.

Dealer mode: "Dealer pipeline" sheet

Your customers' machines. Turn expiring warranties into extended warranty and service contract offers. The Dashboard counts Offer due, Offered, Taken and Declined and lists the next 10 touches. The "Email templates" sheet has the 90, 60 and 30-day emails.

Owner mode: "My equipment" sheet

Your own equipment. Same date columns, plus a check window (60 days unless you change it) and a claim status. An amber row means book a check and report faults while the machine is still covered.

1 Fill one row per machine (columns A–T, data starts on row 4)

Column	What goes in it (shaded rows are calculated: don't type there)
A–D Customer ... Serial	Customer (owner mode: Asset), contact email, model, serial number
E–G Install, Invoice, Start rule	Both dates if you have them. Start rule: Install or Invoice , whichever your manufacturer program counts from
H Warranty start	=IF(G4="Invoice", F4, E4)
I, K Parts / Labor months	Months of each cover type, e.g. 12 printhead and 18 electrical
J, L Parts / Labor end	=EDATE(H4, I4) and =EDATE(H4, K4)
M Next end	=IF(MIN(J4, L4) >= TODAY(), MIN(J4, L4), MAX(J4, L4)): split cover runs from whichever ends first
N Days left	=M4 - TODAY()
O Touch due	90, 60, 30 or 7 by days left; "Lapsed" after the end date; blank once Taken or Declined
P–T Last touch ... Notes	Last touch sent (90/60/30/7), Status (Offer due, Offered, Taken, Declined), owner, backup, notes

2 Work the touches

90 days

Coverage review email.
Offer a check visit.

60 days

Quote email. Recommend
the option that fits.

30 days

Decision request: end date
and repair costs after it.

7 days

Phone the decision-maker.
Set Taken or Declined.

3 Read the colours

- **Red row:** 30 days or less, no decision yet
- **Amber row:** Touch due differs from Last touch sent: send it
- **Gray row:** Taken. The new contract gets its own row

4 15-minute weekly review

- Sort by Days left, hide Taken and Declined (2 min)
- Send the amber rows, update Last touch and Status (5 min)
- Book a call for every row showing 7 (3 min)
- Clear lapsed rows: record the decision (3 min)
- Scan the next 120 days and owners' time off (2 min)

Worked example (illustrative dates, also on the "Start here" sheet)

Installed Mar 3, 2025 · 12 months printhead · 18 months electrical

Parts end **Mar 3, 2026** · Labor end **Sep 3, 2026**

On Jan 21, 2026: **41** days to the next end, **225** on electrical cover.

Touch due **60**, last sent **90**, so the row is **amber**: the quote is due.

5 Missing install date?

Use the best evidence you have: install job sheet, delivery note, warranty registration, the customer's records, then the invoice date as a last resort. Write "install date estimated from invoice" in Notes.

A spreadsheet only changes when someone opens it. Book the weekly review in your calendar.