

CD-RMA Proactive Maintenance Outreach Workflow

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Category: Procedures

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Tools Needed

- [SFDC](#)
- [CD-RMA Proactive Maintenance Outreach Tracker](#)
- [Customer Care Dashboard in Metabase](#)

Roles and Responsibilities

Toronto Advocates	<ul style="list-style-type: none">• Outbound Phone Call Support• RMA Case Creation• Customer Follow-ups
FieldOps Team	<ul style="list-style-type: none">• RMA Processing

Background

We're reaching out to Members who have had a maintenance flag on their trainers. In order to ensure they have the best experience with their Tonal, we need to perform an outreach to explain that their Tonal requires a tune up.

In order to limit the inconvenience to their training experience, we will offer a complimentary replacement to make sure they can continue enjoying their Tonal.

Who's Eligible?

Customers who have high usage on their Tonal and that are part of the [CD-RMA Proactive Maintenance Outreach Tracker](#).

Procedure

1. Go through the [CD-RMA Proactive Maintenance Outreach Tracker](#) and copy the customer's Device ID shown in column "A"

2. Search for Device ID using Metabase

Log into the [Customer Care Dashboard in Metabase](#)

Search for the customer's Device ID in the lookup functionality. Remember to use the full Device ID (0's included).

The screenshot shows the Metabase Customer Care Admin Tool interface. At the top, there is a search bar with the text "Search...". Below it, the "Full Device ID" field is highlighted with a red box and contains the value "080000700011893". The interface displays a table of workout data with columns: device_id, user_id, email, first_name, last_name, last_workout_time, time_zone_name, workout_name, and workout_det. The table shows 658 rows of data. The first few rows are:

device_id	user_id	email	first_name	last_name	last_workout_time	time_zone_name	workout_name	workout_det
080000700011893	f3f7ef9d-b041-31d9-8750-7110f8902ce0	briansc1000@gmail.com	Brian	Schriener	June 3, 2021, 3:03 PM	America/Chicago	Upper Body Mobility	workout-det.
080000700011893	81e7459f-1975-3318-88ca-f67769d14170	hollyleigh8@gmail.com	Holly	Schriener	June 3, 2021, 5:55 AM	America/Chicago	Posture Prep	workout-det.
080000700011893	f3f7ef9d-b041-31d9-8750-7110f8902ce0	briansc1000@gmail.com	Brian	Schriener	June 2, 2021, 1:04 PM	America/Chicago	Back And Triceps Day 2	workout-det.

3. Search for device ID in SFDC.

4. Click on the customer's Person Account and go to the "Asset Contact" to confirm the device ID has an active status.

The screenshot shows the Salesforce Service Console interface. At the top, there is a search bar with the text "Search...". Below it, the "Full Device ID" field is highlighted with a red box and contains the value "080000700011893". The interface displays a table of search results with columns: Case Number, Status, Account Name, Subject, Issue Category, Date/Time Opened, and Owner Name. The table shows 3 results. The first few rows are:

Case Number	Status	Account Name	Subject	Issue Category	Date/Time Opened	Owner Name
00016251	Closed	Adam Craig	Your Tonal Installation	Installation	8/20/2019 4:22 AM	Karly O'Connell
00224606	Solved	Adam Craig	Your Tonal Equipment Update	Company Information	2/24/2021 8:01 AM	Suzanne at Tonal
00073056	Closed	Adam Craig	Your Tonal Bar Update	Company Information	7/11/2020 9:12 AM	Elvin Gustaf

5. Click on Orders and look for the completed order.

If the customer does not have a completed order linked to their account, go into the customer's installation experience case to confirm the Order ID. Keep in mind you might find some older orders in this tracker (before Order Object was live).

Service Console | Quick Text | 080000700011893... | Adam Craig | 00472627

Person Accounts > Brian Schriener

Orders

6 items • Sorted by Created Date • Updated a few seconds ago

	Order Number	Status	Order Created Date	Contract Number	Order Amount
1	00028235	Cancelled	9/14/2020		\$4,772.00
2	00028225	Cancelled	9/14/2020		\$4,772.00
3	00028224	Cancelled	9/14/2020		\$5,360.00
4	00028222	Cancelled	9/14/2020		\$4,772.00
5	00024096	Processing	8/12/2020		\$359.10
6	00022172	Completed	7/14/2020		\$4,772.00

6. Under cases look for “Installation Experience Case”

Note: Confirm that the customer does not have an RMA or Equipment Update Case, if they do please raise to Support Staff for review.

Person Accounts > Brian Schriener

Cases

5 items • Sorted by Date/Time Opened • Updated a few seconds ago

	Case	Case Record Type	Date/Time Opened	Last Activity Date	Issue Category	Status	Follow up	Device ID	Priority
1	00472627	RMA Case Experience	6/2/2021 8:14 PM	6/3/2021 11:54 AM	Company Information	Pending Hold	6/8/2021	080000700011893	Medium
2	00461659	Customer Support	5/29/2021 12:10 PM	6/2/2021 8:39 PM	Troubleshooting	Open	5/31/2021		Medium
3	00099895	Customer Support	10/4/2020 11:52 AM	10/4/2020 11:52 AM	Duplicate	Closed			Medium
4	00081547	Customer Support	8/12/2020 4:02 PM	6/1/2021 12:54 PM	Order Management	Solved			Medium
5	00073742	Installation Experience	7/14/2020 5:20 AM	10/9/2020 11:32 AM	Installation	Closed	10/31/2020		Medium

7. Once you have confirmed the customer does not have an RMA or EU case in their account, create an RMA case for them!

- Click on **New**.
- Select **RMA Case Experience**.

Service Console | Quick Text | 080000700011893... | Adam Craig | 00472627

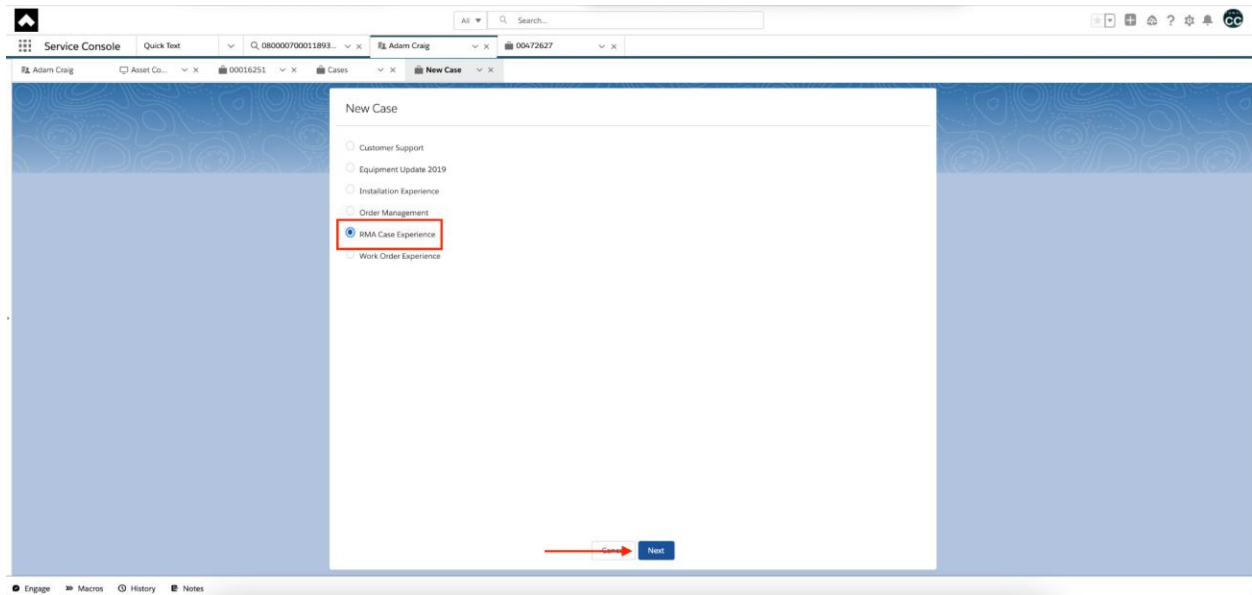
Person Accounts > Adam Craig

Cases

5 items • Sorted by Date/Time Opened • Updated 7 minutes ago

New Change Owner

	Case	Case Record Type	Date/Time Opened	Last Activity Date	Issue Category	Status	Follow up	Device ID	Priority	Subject
1	00227327	Order Management	2/25/2021 8:52 AM	3/8/2021 8:51 AM	Order Man...	Closed	3/8/2021		Medium	Your Bar and Rope Update
2	00224606	Equipment Update 2019	2/24/2021 8:01 AM	4/23/2021 11:48 AM	Company I...	Solved	5/30/2021	080000500...	Medium	Your Tonal Equipment Update
3	00073056	Customer Support	7/11/2020 9:12 AM	3/1/2021 3:01 PM	Company I...	Closed		080000500...	Medium	Your Tonal Bar Update
4	00016251	Installation Experience	8/20/2019 4:22 AM	9/21/2019 1:36 PM	Installation	Closed		080000500...	Medium	Your Tonal Installation
5	00016233	Customer Support	8/19/2019 3:21 PM	8/25/2019 11:43 AM	Order Man...	Closed			Medium	Pre-Installation Survey Tonal



8. Using the original Installation Experience case as a reference, in the case creation page, complete the following fields under the “product Returning Under RMA” section:

- Original Order ID
- SFDC Order (if applicable)
- Purchase date
- Scheduled Install Date
- Device ID
- Serial Number (found in Metabase)

Product Returning Under RMA

Original Order ID	1000054458	* Device ID	080000700011893
SFDC Order	00022172	* Serial Number	0000103143
Purchase Date	7/7/2020	Related Jira (Default)	
Scheduled Install Date	10/20/2020	Related Jira (Backup)	
Job Number		Related Jira (Backup)	

Under the “Warehouse SO” section:

- Carrier (found in the Install Experience Case)

Warehouse SO	
Type of Order --None--	Carrier XPO
Inventory Type --None--	Special Packaging --None--
DMS Label --None--	Shipping Service --None--
DMS ID	Return Label Needed <input type="checkbox"/>

9. Run Macro: [RMA Issued: CD-RMA Proactive Maintenance Outreach](#). This macro will move the RMA processing forward.

- Personalize the email before sending it to the customer if applicable!

10. Apply Quick Text: [CD-RMA Proactive Maintenance Outreach: RMA Issued](#).

11. Go back to update the following case details:

- Follow up date: 5 days after the RMA Issued Date
- Order ID: RMA Case Number-CD-RMA. This format on the order ID will help us identify all units being shipped for this effort. Make sure you're following the correct format!
- RMA Issued Date = Day RMA Case is being created

Request Information	
Product Tonal	Status Pending Hold
Issue Category Company Information	Follow up 6/8/2021
Issue Warranty	Request Type
Resolution Category Issued RMA	Priority Medium
Resolution	
Customer Feedback	
Flag for Installer Review	
Flag for Installer Review Reason	
Flag for Installer Review Details	

Replacement Product Information	
Order ID 00472627-CD-RMA	RMA Install Date
RMA Issued Date 6/2/2021	RMA Job Number
Replacement Device ID	Refund Amount
Replacement Serial Number	

12. Go back to the [CD-RMA Proactive Maintenance Outreach Tracker](#) and update column "G" with the RMA Case number or the reason why an RMA Case was not opened.

This workflow is completed!

Messaging Guide (FAQs):

Is this maintenance exchange optional?

This is necessary in order to make sure you can consistently continue your training with Tonal. While we will always respect the boundaries of your household, we would like to visit briefly in order to exchange the unit. It works to your benefit and helps us ensure you have a reliable Tonal in use.

Is my Tonal still safe to use? Can I use the current trainer until you deliver the replacement?

Based on your household's usage patterns and the maintenance required for this unit, we recommend performing an inspection check on the unit prior to continuing workouts. This should include: testing each arm control to confirm it adjusts properly and locks securely, checking for any signs of physical wear on the body of the trainer, and assessing the cable for any wear.

To assess the cable, set the weight down to 5lbs and turn the weight off. Set the cart in the lowest position. Then, pull the cable as far out as possible. Allow the cable to slowly retract while you visually inspect for any signs of damage or change in appearance. Also please inspect the cable running through your cart in the most extended position.

If the inspection shows no change in appearance or condition, you may resume your workouts in the meantime while we process the exchange. If you identify any changes in appearance or condition compared to previous inspections, please stop using the product.

We will rush your new unit to your location and make sure you move to the front of the line for scheduling and delivery. The exchange process typically takes less time than a new installation, so our team will be in and out to perform the swap.

Yes, as long as you have performed a recent inspection on your Tonal. We would like to process this replacement as quickly as possible so that we can make sure you stay safe while training.

Is this a widespread issue?

No. This is a standard maintenance process that we require after a certain amount of usage. Similar to other mechanical products, Tonal requires professional maintenance and service from time to time. Like a tune up. For the best experience, we want to exchange the unit fully (rather than complete the service in the home).

This is a limited program for select households and Tonal Members. We are accommodating these complimentary replacements based on needs of individual Members and relevant usage patterns.

How quickly will I get the replacement?

ASAP! We are processing As long as we have your go ahead, we will process the shipment now. The shipment takes 7 - 10 days to reach your local warehouse. From there, we schedule the exchange. You can anticipate the process to complete within the next two weeks.

What needs maintenance? Why can't you do this without an exchange?

The maintenance required would take a number of upgrades based on your household's usage patterns. Rather than disrupt your training or cause a lengthy inconvenience to your household, including potentially completing multiple visits, we recommend replacing the full unit. There is no charge to your account or membership for this service -- it's on us!

Is this a wide spread program?

No - this is a limited program for select households and Tonal Members. We are accommodating these complimentary replacements based on needs of individual Members and relevant usage patterns.

How does this impact my warranty?

If in the first year of warranty: Your Tonal is still covered under its one year warranty, so this replacement carries either a 90 day service warranty or the remainder of your original warranty - whichever is longer. The remaining 2nd and 3rd year coverage remains in place.

If out of the first year of warranty: it looks like your Tonal is outside of the one year warranty period, which is the coverage that provides you complimentary replacements. And that's ok! What matters most to us is that you have what you need to keep training with Tonal. We are providing this replacement program on your account and the replacement product comes with an additional 90 day warranty as well as the remaining coverage for your 2nd and 3rd years of warranty.

Resources

Type	Resource
Tool	Customer Care Dashboard in Metabase
Macro	RMA Issued: CD-RMA Proactive Maintenance Outreach
Quick Text	CD-RMA Proactive Maintenance Outreach: RMA Issued
Tracker	CD-RMA Proactive Maintenance Outreach Tracker
FAQs	CD-RMA Proactive Maintenance Outreach FAQs