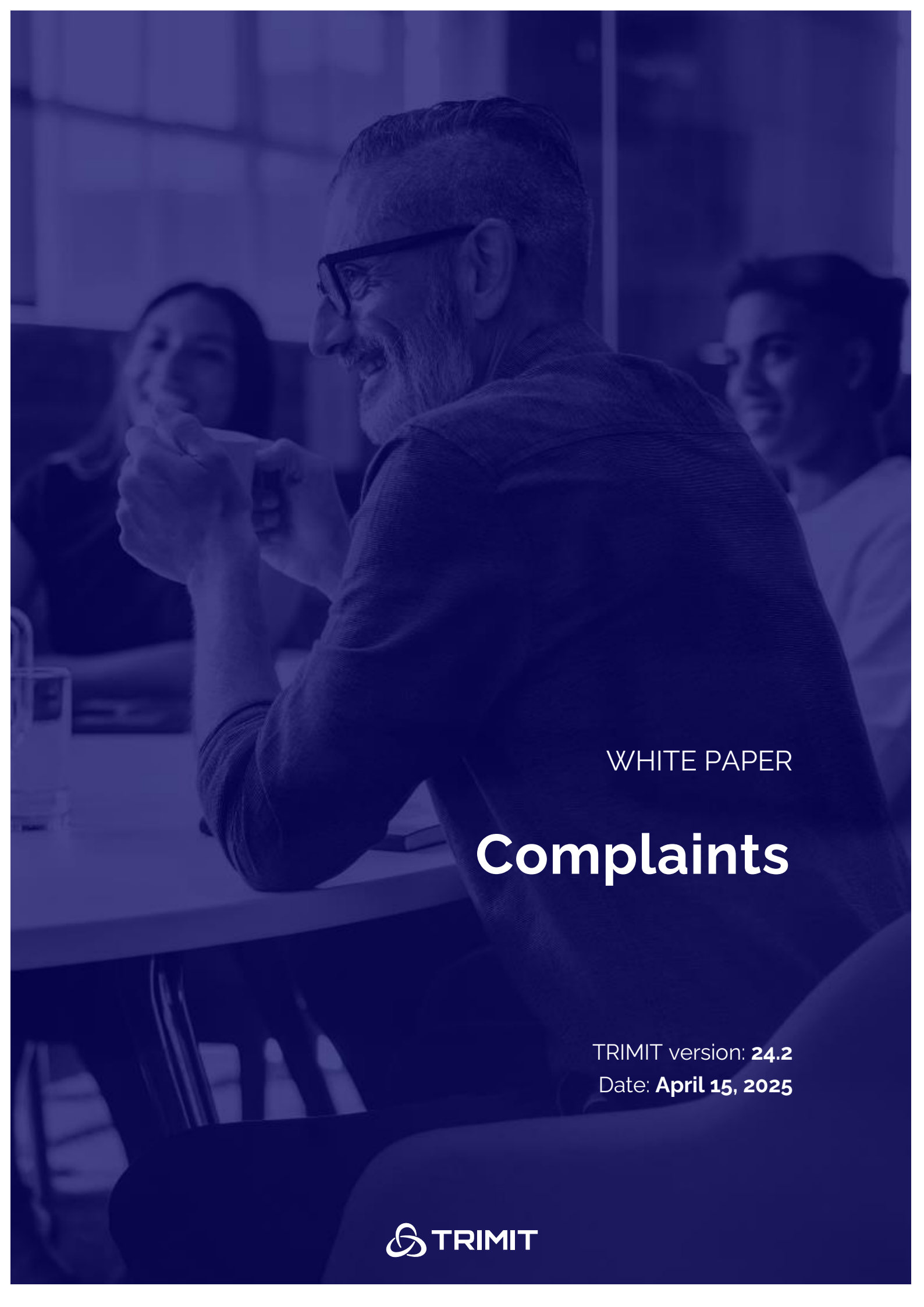




WHITE PAPER

Complaints

TRIMIT version: **24.2**

Date: **April 15, 2025**

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Introduction

Unfortunately, deliveries may go wrong. Packages may contain the wrong products, or a product was damaged during the forwarding process. The customer can come with a **Complaint** for which the Customer Service Department need to decide how to follow-up this Complaint together with the Sales Department.

A combination of actions can be taken among which:

- ➔ *The wrong or damaged product is going to be returned by using a Sales Return Order.*
- ➔ *The wrong or damaged product is going to be replaced by sending a new one by creating a Sales Order.*
- ➔ *A damaged product is going to be repaired by creating a Production Order.*
- ➔ *A Credit Memo is going to be sent.*
- ➔ *The wrong or damaged product will be returned to the supplier.*

All these follow-up processes can be tracked by **TRIMIT Complaints**.

Other features are:

- ➔ *A function to choose and get the information from the **Sales Invoice Lines**, so you will have the right Sales Price.*
- ➔ *The Item can also be configured on the Complaint Line.*
- ➔ *Items that need reparation can get a specific unique **Item No**.*
- ➔ *Another Item can replace an Item.*

It is now also possible in the TRIMIT **B2B** Webshop and TRIMIT **Sales Agent** to register Returns, which will be submitted to the ERP as a Complaint.

See **White Paper – TRIMIT Web Returns** for more details.

The audience for this document is the Consultant or very skilled User. It will only describe the TRIMIT fields/functionality and not the standard Business Central fields/functionality. Be aware of not changing settings and parameters in a live database without consulting the implementing partner.

The functionality described is the functionality as of **TRIMIT 24.2 for Business Central W1 BC25.X**.

The pictures in this White Paper are based on the demo data for **TRIMIT 24.2**, which is based on Microsoft Dynamics 365 Business Central 2024 Release Wave 2, in the demo company **CRONUS TRIMIT W1 Ltd.** (based on CRONUS International Ltd. of Microsoft Dynamics 365 Business Central).

Components

TRIMIT Complaints contains the following objects:

The tables

6635	<i>Return Reasons</i>
6036492	<i>trm API Complaint Header</i>
6036493	<i>trm API Complaint Line</i>
6036673	<i>trm Complaint Line Relation</i>
6036674	<i>trm Complaint Header</i>
6036675	<i>trm Complaint Line</i>
6036677	<i>trm Complaint Buffer</i>
6036688	<i>trm Complaint Line Rel. Compl.</i>
6036689	<i>trm Complaint Header Completed</i>
6036690	<i>trm Complaint Line Completed</i>

The pages

6036692	<i>trm Complaint Order</i>
6036993	<i>trm Complaint Order Subform</i>
6036995	<i>trm Complaint Orders List</i>
6036696	<i>trm Completed Complaint List</i>
6036697	<i>trm Completed Complaint</i>
6036698	<i>trm Complaint Order Lin Compl</i>
6036819	<i>trm Complaint Document FactBox</i>
6036825	<i>trm Complaint Line FactBox</i>
6036826	<i>trm Complaint Compl FactBox</i>
6036827	<i>trm Complaint Line Con FactBox</i>
6036828	<i>trm Complaint ComplDoc FactBox</i>
6038006	<i>trm Dialog Complaint Line</i>

The reports

6036689	<i>trm Complaint Data</i>
6036691	<i>trm Complaint Statistics</i>

The codeunits

6036729	<i>trm Complaint Handling</i>
6038012	<i>trm API Complaint Create</i>

Besides these special objects, also other objects have been customized for TRIMIT Complaints, like i.e., the pages of the Sales Order, Sales Credit Memo, Posted Sales Invoice and Posted Credit Memo: a field **Complaint** indicating that the document is related to a Complaint Yes/No.

Setup

This chapter contains information about the Setups that you need.

User Setup

You can find the **User Setup** via **Search User Setup**.

For each user using TRIMIT Complaints the **System Responsible Sales** should be put to **Yes**.

User Setup



✓ Saved 

ADMIN

General >

System Responsibility

System Responsible System Data	Yes	System Responsible Purchase	Yes
System Responsible Finance	Yes	System Responsible PDM	Yes
System Responsible Sales	Yes	Maintain Customer Information	Yes
System Responsible Production	Yes		

System Responsible Sales

This Parameter set to **Yes** opens the possibility to change fields or delete records.

If set to **No** the fields cannot be changed or action cannot be carried out:

Table	Name	Field / Action
6036674	Complaint Header	Delete record
6036674	Complaint Header	Change Completed Complaints from Yes to No
6036672	Sales Line Discount Type List	Related Information/Line Discount Types/Update Line Discounts/ Regenerate Line Discount Lines

Page	Name	Field/Action/Function
6036672	Sales Line Discount Type List	Related Information/Line Discount Types/Update Line Discounts/ Calculate All Line Discount
6036673	Sales Lines Discount Type Card	Related Information/Line Discount Types/Update Line Discounts/ Regenerate Line Discount Lines
6036673	Sales Lines Discount Type Card	Related Information/Line Discount Types/Update Line Discounts/ Calculate All Line Discount

General Ledger Setup

You can find the **General Ledger Setup** via **Search General Ledger Setup**.

General Ledger Setup

General

Posting

VAT

Bank

Journal Templates

More options

Parameter Selection

General Ledger

Automatic Description in General Journal

Document No. Check

Purchase/Sales Joint

Description at Payables/Receivables Account

Transaction Type Sales/Purchase

Transaction Type Credit Memo & Returns

Transaction Type Transfer Order

Transaction Type Replacement of Returned Goods

Transaction Type Replacement for Goods not being...

Total

Customer/Vendor Name

11

21

31

22

23

Purchase

Description by Purchase Posting

Sales

Description by Sales Posting

Purchase Header

Sales Header

Transaction Type Credit Memo & Returns

It is used for Intrastat: **Transaction Type**.

This will be the default **Transaction Type** for Return Orders and Credit Memo's in Sales and Purchase when the field **EU Country/Region Code** of the Sell-To/Buy-From Country/Region is filled.

Transaction Type Replacement of Returned Goods

It is used for Intrastat: **Transaction Type**.

This will be the default **Transaction Type** for Sales Order that is created based on a Complaint with **Solution Customer** is set to *Return on Refund + Replacement* when the field **EU Country/Region Code** of the Sell-To/Buy-From Country/Region is filled.

Transaction Type Replacement for Goods not being Returned

It is used for Intrastat: **Transaction Type**.

This will be the default **Transaction Type** for Sales Order that is created based on a Complaint with **Solution Customer** is set to *Return + Replacement* or *Replacement* when the field **EU Country/Region Code** of the Sell-To/Buy-From Country/Region is filled.

In **Creation of Sales Documents** via our **Complaints**, we set the **Transaction Type** of the created Sales Documents based on the **Solution Customer**.

The numbers refer to the **Transaction Types** (Nature of Transaction) chosen in the above picture:

	Sales Order	Sales Credit Memo	Return order Credit Memo when	Production Order
	New Item to Customer	No Item returned	Item is returned	
Refund		Yes, 21		
Refund + Replacement	Yes, 23	Yes, 21		
Refund on Return			Yes, 21	
Refund on Return + Replacement	Yes, 22		Yes, 21	
Replacement	Yes, 23			
Repair				Yes, No Transaction Type

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Return Reasons

You can use the **Return Reasons** for setting some defaults for the fields in a Complaint Header and in the Complaint Lines.

You can find the **Return Reasons** via **Search Return Reason**.

Return Reasons | Work Date: 11-04-2022

✓ Saved

+ New Edit List Delete

Code ↑	Description	Default Location Code	Inventory Value Zero	Solution Customer	Free of Charge	Solution Vendor	Use for Portal Returns
DAMAGED	Damaged in Shipment	B-CHOICE	☐	Replacement	No	No Default	☒
→ DEFECTIVE	Defective Item	B-CHOICE	☐	Refund on Return + Replacement	No	No Default	☒
NONEED	No Current Need		☐		No	No Default	☐
P-REPAIR	Repair Purchased Item	B-CHOICE	☐	Refund on Return + Replacement	Yes	Replacement	☐
SMALL	Small damage	B-CHOICE	☐	Refund	No Default	No Default	☒
S-REPAIR	Repair Sold Item	B-CHOICE	☒	Repair	Yes		☐
WRONG	Wrong Item	B-CHOICE	☐	Refund on Return + Replacement	Yes	No Default	☒

Note

For the Web Returns on the TRIMIT B2B Webshop and TRIMIT Sales Agent, it is mandatory to set up and use the **Return Reasons**, because they determine the information for the submitted Return, which will become a TRIMIT Complaint in the ERP.

For the Web Returns, the **Return Reason** will simply be called: **REASON**.

Solution Customer

In the field **Solution Customer**, the appropriate solution can be entered about how to manage a Complaint. There are several options possible. These options each have a different result in what other actions should be taken regarding the creation of Sales Orders, Sales Credit Memos, Sales Return Orders or Production Orders. In the table below you can see what these are:

	Sales Order	Sales Credit Memo	Return order Credit Memo when	Production Order
	New Item to Customer	No Item returned	Item is returned	
Refund		Yes		
Refund + Replacement	Yes	Yes		
Refund on Return			Yes	
Refund on Return + Replacement	Yes		Yes	
Replacement	Yes			
Repair				Yes

Note

For a Web on the TRIMIT B2B Webshop and TRIMIT Sales Agent, the **Customer Solution** will simply be called: **SOLUTION**.

Free of Charge

If this field is set to *TRUE*, the **Unit Price excl. VAT** in the created Sales Documents based on a Complaint will be set to zero. Also, the **Direct Unit Cost** in the created Purchase Documents based on a Complaint will be set to zero.

Solution Vendor

There are four options how to handle actions towards the Vendor in case of a Complaint. If the *Blank* option is chosen, it will mean that there are no actions towards the Vendor.

	Purchase Order	Purchase Credit Memo
Blank		
Refund/ Reduction		Yes
Replacement	Yes	
Replacement (Drop Shipment)	Yes*	

* Created as Drop Shipment to Sales Line and only valid if a Solution Customer is set to Replacement.

Sales & Receivables Setup

In the **Sales & Receivables Setup** the following Parameters are necessary for working with TRIMIT Complaints. The Sales & Receivables Setup is found via **Search Sales & Receivables Setup**.

FastTab Number Series

Sales & Receivables Setup

Customer Groups

Payments

More options

Number Series

Customer Nos. CUST

Quote Nos. S-QUOTE

Blanket Order Nos. S-BLK

Order Nos. S-ORDER

Return Order Nos. S-RETORD

Invoice Nos. S-INV

Posted Invoice Nos. S-INV+

Credit Memo Nos. S-CR

Posted Credit Memo Nos. S-CR+

Posted Shipment Nos. S-SHPT

Posted Return Receipt Nos. S-RCPT

Reminder Nos. S-REM

Issued Reminder Nos. S-REM+

Canceled Issued Reminder Nos.

Fin. Chrg. Memo Nos. S-FIN

Issued Fin. Chrg. M. Nos. S-FIN+

Canceled Issued Fin. Charge Memo Nos.

Posted Prepmt. Inv. Nos.

Posted Prepmt. Cr. Memo Nos.

Direct Debit Mandate Nos.

Summary Order Nos. S-SUMORD

Campaign Discount Nos. CAMPDISC

Complaint Order Nos. COMPLAINT

Item Replacement Nos. REPLACE

Consignment Journal Nos. CONS

Gift Card Batch Nos. GCBATCH

Complaint Order Nos.

No. Series for the Complaints: Documents in which Complaints can be documented and followed up with a Sales Order, Sales Credit Memo, Sales Return Order or Production Order.

FastTab Info and Prices

Sales & Receivables Setup

Customer Groups

Payments

More options

Info and Prices

Availability Check

Standard Inventory Profile Setup ALL

Availability Date Format Week

Availability Message Type Notification

Availability Check by Location

Availability Check on Make-To-Order Items

Skip Availability Info Pane

Skip Availability Check Complaint

Skip Availability Check Return Order

Skip Availability Check Sales Credit Memo

Discounts

Extended Discount Search Automatically per Line

Line Discount Combination

Show Line Discounts of 0 %

Approve Change of Line Discount % Ask if existing Line Discount % is larger than 0 (Default Yes)

Date Management

Sales Header Date -> Sales Line Date No

Commission

Extended Commission Search No

Approve Change of Commission Ask if existing Commission is larger than 0 (Default Yes)

Prices

Skip Availability Check Complaint

This Parameter determines if an Availability Check should take place when entering a Line in a Complaint.

If you choose Yes, the Availability will not be calculated.

If you choose No, the Availability will be calculated, and you can get messages.

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FastTab Complaint

Sales & Receivables Setup

Customer Groups

Payments

More options

Complaint

Item to be Used as Description

No.

Item Base for Vendor Search

No.

Return Reason Code Mandatory

No

Allow Lines of Type G/L Account

☒

Default Collapse Matrix

☐

Default Quantity Complaint

0.00

Default Handling

Default Return Reason Code

DEFECTIVE

Invoice Information

Invoice Reference Mandatory

Confirm missing Invoice Reference.

Horizon, Invoice No. Search

6M

Automatic Search Invoice No.

☐

Repair

Item No. For Repair Production Order

REPAIR

Reverse Production Entry

☐

Description of the Parameters:

Item to be Used as Description

This Parameter determines which Item Description to be filled into **Description** and **Description 2** of a Complaint Line.

You can choose between the following four options:

No.	Descriptions of the Item in current Language will be found based on No. (Master/Item Number)
Complaint Item No.	Descriptions of the Item in current Language will be found based on Complaint Item No.
Invoiced Item No.	Descriptions of the Item in current Language will be found based on Invoiced Item No.
Replacement Item No.	Description of the Item in current Language will be found based on Replacement Item No.

NOTE

No. – The Item we will react on

Complaint Item No. – The Item the customer complaints about

Invoiced Item No. – The Item the customer purchased and has been invoiced.

Replacement Item No. – The Item that might replace the No.

In fashion it might not have any meaning, but I.e. If a customer buys a chair, he could have the situation that he is missing one screw (the Item he complains about: **Complaint Item No.**). What you want is to give the customer a bag of screw etc. (this is the **No.** and of course in the end the cost of the complaint), and of course, there is the **Invoice Item No.:** the chair.

In the end, both the Complaint Item No. and the Invoice Item No. are more for statistical purpose. This makes it possible to conclude that this Item is always broken when it is used for these Sales Items etc.

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Item Base for Vendor Search

This Parameter determines which Item Vendor No. to be filled into **Vendor No.** at Complaint Line. You can choose between the following four options:

No.	Item Vendor No. will be found based on No. (Master/Item Number)
Complaint Item No.	Item Vendor No. will be found based on Complaint Item No.
Invoiced Item No.	Item Vendor No. will be found based on Invoiced Item No.
Replacement Item No.	Item Vendor No. will be found based on Replacement Item No.

Return Reason Code Mandatory

This Parameter can be used to ensure that **Return Reason** has been filled before posting a Complaint. You can choose between the following three options:

No	A Complaint without Return Reason can be posted.
Confirm missing Return Reason Code	You will be asked to accept that Return Reason has not been filled. If you do not accept; the posing of the Complaint will be interrupted.
Yes	The posting of the Complaint will be interrupted if Return Reason is not filled.

Note

Regardless the content of the **Return Reason Code Mandatory**, for a Web on the TRIMIT B2B Webshop and TRIMIT Sales Agent it is always mandatory to choose a REASON.

Allow Lines of Type G/L Account

If this Parameter is Yes, Complaint Lines of **Type G/L Account** can be entered and posted.

If Complaint Lines of **Type G/L Account** should be allowed, this Parameter should be set to Yes, otherwise an error will be raised at choosing the Type.

Depending on the setting of this Parameter, the **Get Posted Sales Invoice Lines** function in the Complaint will include/exclude the **Type G/L Account** on the Posted Invoice Lines that can be chosen.

Note

G/L Account Lines is only set on a Sales Return Order, or a Sales Credit Memo based on **Solution Customer** and not on a Sales Order (in case of Replacement i.e.) or Production Order (Repair). This is not implemented yet in the Web Returns.

Default Collapse Matrix

If this Parameter is Yes, any Matrix used at a Complaint Line will already be collapsed.

You need to put a checkmark in **Expand Matrix** on the Complaint Line to see all the Item Lines.

Default Quantity, Complaint

In this Parameter you can enter a decimal as default **Quantity** for the Complaint Lines.

Default Return Reason Code

In this Parameter, you can choose a default Return Reason. If chosen, every new created Complaint will get this **Default Return Reason Code**, but this code can be overwritten in the Complaint Header.

Based on the fields of the [Return Reason Code](#), other fields in the Complaint will also be filled by default.

Invoice Reference Mandatory

This Parameter can be used to ensure that **Concerning Invoice No.** has been filled before posting a Complaint.

You can choose between the following three options:

No	A Complaint without Concerning Invoice No. can be posted.
Confirm missing Invoice Reference	You will be asked to accept that Concerning Invoice No. has not been filled. If you do not accept; the posing of the Complaint will be interrupted.
Yes	The posting of the Complaint will be interrupted if Concerning Invoice No. is not filled.

Note

Regardless the content of the **Invoice Reference Mandatory**, for a Web Return on the TRIMIT B2B Webshop and TRIMIT Sales Agent the **Invoice Reference** will always be filled based on the selected **PRODUCT NO.** and/or **DOCUMENT NO.**

Horizon, Invoice No. Search

If the **Get Posted Sales Invoice Lines** function is used it is mandatory to fill in a Horizon (Date Formula) for the period, the search should be carried out (this is to limit the processing time).

I.e., if you enter 3M, the system will only show you the Posted Sales Invoice Lines with a **Posting Date** between 3 months back and now.

Automatic Search for Invoice No.

If this Parameter is Yes, the program will automatically search the Customers Posted Sales Invoices for the last invoiced Line of the specific **No.** on the Complaint Line and add it to the **Concerning Invoice** and **Concerning Invoice Line**.

Item No. for Repair Production

If Repair Orders (Production Orders) should be raised as Related Order on the Complaint Line, this Parameter should be filled with an **Item No.** that should be used for the creation of a Production Order. The Item could have a default Item BOM if the repair procedures are general for all Items.

Reverse Production Entry

If this is set to Yes, finishing a Production Order with the **Item No. For Repair Production Order** will not result in an increase of the Inventory for that Item.

The positive **Item Ledger Entry** based on the Output (Finishing) will be reversed again with a *Negative Adjustment*, and this is also applicable for the corresponding **Value Entries**. I.e.,

Item Ledger Entries

Find entries...

Entry

Order Tracking

Application Worksheet

More options

Posting Date	Entry Type	Docume... Type	Document No.	Item No.	Description	Brand Code	Season Code	Location Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Open	Order Type	Entry No.
6/4/2025	Negative Adjmt.		PC000001	REPAIR	Repair Master for Complaints	FASHION		BLUE	-1	-1	0	0.00	-9.90	0.00	☐	Production	5723
6/4/2025	Output		PC000001	REPAIR	Repair Master for Complaints	FASHION		BLUE	1	1	0	0.00	9.90	0.00	☐	Production	5722
6/4/2025	Consumption		PC000001	M200020	Fabric 72% Polyamide, 28% Elastane			BLUE	-2	-2	0	0.00	-9.90	0.00	☐	Production	5721

Value Entries

Find entries...

Entry

More options

Posting Date	Item Ledger Entry Type	Entry Type	Adjustment	Document No.	Sales Amount (Actual)	Cost Amount (Expected)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Item Ledger Entry Quantity	Valued Quantity	Invoiced Quantity	Cost per Unit	Cost per Unit (ACT)	Item No.	Source Type	Source No.	Order Type	Item Ledger Entry No.
6/4/2025	Consumption	Direct Cost	☐	PC000001	0.00	0.00	-9.90	0.00	-9.90	-2	-2	-2	4.95	0.00	M200020	Item	REPAIR	Production	5721
6/4/2025	Output	Direct Cost	☐	PC000001	0.00	0.00	0.00	0.00	0.00	1	1	0	0.00	0.00	REPAIR	Item	REPAIR	Production	5722
6/4/2025	Output	Direct Cost	☐	PC000001	0.00	0.00	9.90	0.00	9.90	0	1	1	9.90	0.00	REPAIR	Item	REPAIR	Production	5722
6/4/2025	Negative Adjmt.	Direct Cost	☐	PC000001	0.00	0.00	0.00	0.00	0.00	-1	-1	-1	0.00	0.00	REPAIR	Item	REPAIR	Production	5723
6/4/2025	Negative Adjmt.	Direct Cost	☒	PC000001	0.00	0.00	-9.90	0.00	-9.90	0	-1	0	9.90	0.00	REPAIR	Item	REPAIR	Production	5723

You can set this Parameter to Yes, unless you use **Item Tracking** (Lot Nos. or Serial Nos.) for the **Item No. For Repair Production Order**. In that case, it must be set to No.

Production Setup

The Production Setup is found via **Search** *Production Setup*.

FastTab Numbering

Production Setup

Numbering

Production Document Nos.	PRODDOC	Production Series Nos.	PRODSERIE
Make-to-Stock Nos.	PRODMTS	Production Collecting Order Nos.	PRODCOL
Make-to-Order Nos.	PRODMTO	Complaint Make-to-Order Nos.	PRODMTOCOMPL

Complaint Make-to-Order Nos.

If **Repair Orders** are created as **Related Production Orders** attached to Complaint Lines, this **No. Series** needs to be entered. This will happen based on the **Customer Solution Repair**.

Inventory Profile Setup

The Inventory Profile Setup is found via **Search** *Inventory Profile Setup* and determines which Transactions are included to calculate the Availability of an Item.

You can include the **Complaints** into the **Inventory Profile Setup**, which can be used in many pages and in some reports as a filter of Transactions to be included to calculate Availability.

You need to be aware, that the quantity of a **Complaint** could also be on a **Sales Order, Credit Memo, Purchase Order** or **Purchase Credit Memo**. So be careful with this checkmark.

Inventory Profile Setup																			
		✓ Saved																	
		Search + New Edit List Delete Edit View																	
Code ↑	Description	Loc...	Incl... Inve...	Incl... Sales Quo...	Incl... Sales Ord...	Incl... Sales Invo...	Incl... Sales Blan... Ord...	Incl... Sales Credit Me...	Incl... Complaints	Incl... Sales Imp... Lines	Incl... Pro... Sug...	Incl... Pro... Ord...	Incl... Tran... Ord...	Incl... Purc... Quo...	Incl... Purc... Ord...	Incl... Purc... Invo...	Incl... Purc... Blan... Ord...	Incl... Purc... Credit Me...	Incl... Inte...
→ ALL	:	☐	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒	☒
B2B		☐	☒	☒	☒	☐	☐	☐	☐	☒	☐	☒	☐	☐	☒	☐	☐	☐	☐
B2C		☐	☒	☐	☒	☐	☐	☐	☐	☐	☐	☒	☐	☐	☒	☐	☐	☐	☐
INVENTORY	:	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐
INVPUPR		☐	☒	☐	☐	☐	☐	☐	☐	☐	☒	☒	☒	☒	☒	☐	☒	☐	☒
INV-SALES		☐	☒	☒	☒	☐	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒
INVSALPU		☐	☒	☒	☒	☐	☒	☐	☒	☒	☐	☐	☐	☒	☒	☐	☒	☐	☒
INVSALPUPR		☐	☒	☒	☒	☐	☒	☐	☒	☒	☒	☒	☐	☒	☒	☐	☒	☐	☒
ISP		☐	☒	☐	☒	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒	☐	☐	☐	☐
PRODUCTI...		☐	☐	☐	☐	☐	☐	☐	☐	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐
PURCHASE		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☒	☒	☐	☒	☐	☒
SALES		☐	☐	☒	☒	☐	☒	☐	☒	☒	☐	☐	☐	☐	☐	☐	☐	☐	☒
SALESAGENT		☐	☒	☒	☒	☐	☐	☐	☐	☒	☐	☒	☐	☐	☒	☐	☐	☐	☐

Complaint

The **Complaints** can be found via **Search Complaint Order List** but also in the Role Center *TRIMIT Small Business* directly.

CRONUS Complaints

Finance CRM Sales Purchase Product Design Logistics Production Portals Posted Documents All Reports

Customers Vendors Sales Orders Complaints Purchase Orders Masters Pick Documents

FastTab General

CO00001 · The Fashion Store UK

Get Posted Sales Lines for Complaint Approve Create Documents Post Sales Documents Post Purchase Documents Create & Post All Sales Document Test Complete Co

General

Show less

Document No. CO00001

Customer Name The Fashion Store UK

Your Reference

Sell-to

Sell-to Address Station Road, 21

Sell-to Address 2

Sell-to Post Code CB1 2FB

Sell-to City Cambridge

Sell-to Country/Region GB

Sell-to County

Sell-to Contact Charley Nelson

Skip Availability Check

Posting Date 1/1/2024

Salesperson JR

Salesperson 2

Salesperson 3

Bill-to

Bill-to Customer No. 2000

Bill-to Name The Fashion Store UK

Complaint Details

Sales Channel

Received By ADMIN

Date of Receipt 1/1/2024

Shipment Date 1/1/2024

Responsible ID

Status Open

Solution Suggested by

Default Reason

Return Reason Code DEFECTIVE

Handling Customer

Solution Customer Refund on Return + Replacemen

Free of Charge

Sales Replacement Doc... Order

Handling Vendor

Solution Vendor

Document No.

With pressing **<Enter>**, an automatic Number can be created for a new Complaint based on the Parameter in the **Sales & Receivables Setup**.

Customer Name

You can enter a **Customer No.** or a part of the Customer Name, after which the total name of the Customer will be shown.

In addition, many Customers related fields will be filled automatically: see the fields in **green** in the picture above.

Your Reference

In this field, **Your Reference** can be entered.

Sell-to Contact

In this field, the **primary Contact Name** of the **Customer** Card will be filled automatically but can be changed.

Skip Availability Check

This Boolean determines whether an **Availability Check** is executed, when entering a quantity on the Complaint Line. If this Complaint would not be concerning a Replacement, you should put a checkmark in this field. Otherwise, you could get messages that the Item is not available, even if you are only registering the Item for a Credit Memo.

Posting Date

This field specifies the **Date** when the posting of the Complaint will be executed. By default, today's Work Date will be filled.

The **Posting Date** will be copied to the Posting Date of the Credit Memo, Sales Order, Sales Return Order, Sales Invoice, Purchase Order or Purchase Credit Memo when you post the Complaint.

Salesperson, Salesperson 2, Salesperson 3

These fields will be populated automatically by the default **Salesperson** (2 or 3) on the Customer Card. It can be manually changed for this specific Complaint.

Replace Order Type

If you enter a **Replace Order Type**, it will also be copied to any Sales Document Header and -Lines that might be created based on the Complaint.

Replace Collection No.

If you enter a **Replace Collection No.** it will also be copied to any Sales Document Header that might be created based on the Complaint.

Sales Channel

If you enter a **Sales Channel**, it will also be copied to any Sales Document Header and -Lines that might be created based on the Complaint.

This could be for instance the *B2B Portal* or the *Sales Agent*.

Received By

This field will automatically be filled by the **User** that created the Complaint.

But you can overwrite it.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent, the **Received By** will be filled with *CPO* automatically.

Date of Receipt

This field will automatically be filled with the **Work Date** the Complaint was created. It represents the **Date** the Complaint was received.

But you can overwrite it.

Date of Shipment

This field will automatically be filled with the **Work Date** the Complaint was created. It represents the **Date** that a Replacement (Sales Order) will be shipped to the Customer.

But you can overwrite it.

Responsible ID

This can be filled with the **User** that will handle this Complaint.

Status

The **User** that is reviewing the Complaint can make a judgement. If this is not done, the **Status** will be *Open*. After reviewing, the Status could be *Approved* or *Rejected*.

You are also able to set the **Status** from *Open* to *Approved*, by clicking **Approved**.

Complaint Order

CO00001 · The Fashion Store UK

Get Posted Sales Lines for Complaint

Approve

 Create Documents

Solution Suggested by Customer

The Customer may have a preference on how to solve the Complaint. This can be a *Refund* or a *Replacement*.

Return Reason Code

In this field, the Reason for the Complaint can be entered.

This could be mandatory based on [Return Reason Code Mandatory](#) in the Sales & Receivables Setup, and a default can be filled based on the [Default Return Reason Code](#) in the Sales & Receivables Setup, but can be changed.

The **Return Reason Code** on the Complaint Line will be copied from the Complaint Header but may deviate from the one on the Header describing the Complaint per Line.

When entering the **Return Reason Code**, the **Default Location Code** will be copied to the Complaint Lines, and the **Solution Customer**, **Free of Charge** and **Solution Vendor** will be copied to the Complaint Header. This will also happen when there is a **Default Return Reason Code** in the **Sales & Receivables Setup**.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent, the **Return Reason Code** will be filled with the **REASON** of the first product on the Web Return.

Solution Customer

In the field **Solution Customer**, the appropriate solution must be entered about how to manage the Complaint. There are several options possible. These options each have a different result in what other actions should be taken regarding the creation of Sales Orders, Sales Credit Memos, Sales Return Orders or Production Orders. In the table below you can see what these are:

	Sales Order or Sales Invoice New Item to Customer	Sales Credit Memo No Item returned	Return order Credit Memo when Item is returned	Production Order
Refund		Yes		
Refund + Replacement	Yes	Yes		
Refund on Return			Yes	
Refund on Return + Replacement	Yes		Yes	
Replacement	Yes			
Repair				Yes

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent, the **Customer Solution** will be filled with the **SOLUTION** of the first product on the Web Return.

Free of Charge

If this parameter is set to *TRUE*, the **Unit Price** and the **Direct Unit Cost** will be set to 0 for all Orders (Sales & Purchase).

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent, it will set based on the chosen **REASON** of the first product on the Web Return.

Sales Replacement Document Type

This field has two options that determine which Sales Document will be created in case of **Solution Customer** is set to *Refund + Replacement*, *Refund on Return + Replacement* or *Replacement*.

The default is *Order* but can be changed.

Order	A Sales Order is created to replace the Item of Complaint.
Invoice	A Sales Invoice is created to replace the Item of Complaint.

Solution Vendor

There are four options how to handle actions towards the Vendor in case of a Complaint.

If the *Blank* option is chosen, it means that there are no actions towards the Vendor.

	Purchase Order	Purchase Credit Memo
Blank		
Refund/ Reduction		Yes
Replacement	Yes	
Replacement (Drop Shipment)	Yes*	

* Created as Drop Shipment to Sales Line and only valid if a Solution Customer is set to Replacement

FastTab Shipping and Billing

The FastTab **Shipping & Billing** contains Customer information inherited from the Customer card or get from the Concerned Invoice. There is one exception: Location Code Replacement. This field is discussed below.

Shipping and Billing			
Ship-to Code	LONDON	Ship-to Country/Region Code	GB
Ship-to Name	The Fashion Store UK - London	Ship-to County	
Ship-to Name 2		Shipment Method Code	
Ship-to Address	20 Savile Row	Shipping Agent Code	
Ship-to Address 2	Mayfair	Shipping Agent Service Code	
Ship-to Contact		Transport Method	
Ship-to Post Code	WC1 3DG	Location Code, Replacement	
Ship-to City	London		

Most of the fields will be copied from the entered **Customer Name**.

Location Code Replacement

In this field, you can enter the **Location Code** from which Replacing Items will be shipped to the Customer.

FastTab Misc. Parameters

Misc. Parameters			
Language Code	ENG	Currency Code	
Phone No.		Comment	No

Most of the fields will be copied from the entered **Customer Name**.

Comment

This field will automatically be set to Yes, after you have entered the Comments to this Complaint via **Actions, Complaint, Comments**.

Functions on Complaint Header

In the Complaint Header, you can find several actions that can be executed.

Complaint Order	   	✓ Saved
CO00001 · The Fashion Store UK		
 Get Posted Sales Lines for Complaint  Approve  Create Documents  Post Sales Documents  Post Purchase Documents  Create & Post All Sales Document  Test Complete Complaint  Complete Complaint ...		

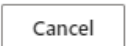
Get Posted Sales Invoice Lines for Complaint

With this Function, a Page opens showing all Sales Invoice Lines for a specific Customer (with **Currency** and **Bill to Customer** on the Header) within the [Horizon, Invoice No. Search](#) set in the Sales & Receivables Setup. From this Page, appropriate Invoice Lines can be selected.

The [Concerning Invoice](#) and [Concerning Invoice Line](#) on the Complaint Line will be populated.

Based on the maximum length of a Text Variable in BC, we decided to set the Limit of Posted Sales Invoices that could be shown to 50.

If there are more than 50 Posted Sales Invoices for the current Customer, you will get an extra Dialog to limit the number of Posted Sales Invoices by setting an extra Filter for the **From-/To Posting Date**:

Please narrow the search (51 records are found within the filter)		 
From Posting Date	7/1/2022	
To Posting Date	7/1/2023	
		 

Approve

With this Boolean, the Complaint gets the Status *Approved*. This is mandatory if the Function **Create Documents** should be executed.

Create Documents

Depending on the settings for **Solution Customer** and **Solution Vendor**, this Function enables the user to create the appropriate Sales, Purchase, and/or Production Documents. Below you find two examples.

Create Refund/Return Customer

Create Replacement Customer

Create Vendor Documents

All

OK

Cancel

Create Repair Order

All

OK

Cancel

Post Sales Documents

With this Function, the **Sales Order**, **Sales Return Order** or **Sales Credit Memo** can be posted directly from the Complaint. Only valid documents to post will be shown.

Post Purchase Documents

With this Function, the **Purchase Order** or **Purchase Credit Memo** can be posted directly from the Complaint. Only valid documents to post will be shown.

Create & Post All Sales Documents

With this Function, all appropriate Sales Documents are created and posted.

Test Complete Complaint

This Function test, if the Complaint can be completed; if all Lines have been processed and if all the attached Documents have been posted. If not, an error will appear.

Complete Complaint

The Function **Complete Complaint** moves the Complaint Header and -Lines to **Completed Header** and **-Lines** Tables. This can only happen, if all Lines have been processed and all attached Documents have been posted.

You can find the Completed Complaints via **Search Completed Complaints**.

The Layout of the page will be the same as for the normal Complaint, but you are not able to change it anymore.

Actions on Complaint Header

Complaint Order

CO00001 · The Fashion Store UK

Get Posted Sales L-Lines for Complaint

Approve

Create Documents

Post Sales Documents

Post Purchase Documents

Create & Post All Sales Document

Test Complete Complaint

Complete Complaint

Actions

Related

General

Document No. CO00001

Salesperson JR

Default Reason

Customer Name The Fashion Store UK

Salesperson 2

Return Reason Code DEFECTIVE

Details

User Defined

Manage

Expand All

Collapse All

User Defined

This will open the **Page Actions** in which you are able to make 'shortcuts' to other programs.

Manage, Expand All / Collapse All

With these Functions, the user can **Expand** or **Collapse** all Matrix Lines on the Complaint Lines.

Related on Complaint Header

In this paragraph, menu items below Navigate are discussed below.

Complaint

The screenshot shows the 'Complaint Order' header for 'CO00001 · The Fashion Store UK'. The 'Related' menu is open, showing options: Complaint, Comments, Workflow, Dimensions, and Picture Overview. The 'Complaint' option is highlighted.

Drilling down from **Related, Complaint**, the user can attach all kinds of specific Complaint Information, such as **Comments**, a TRIMIT **Workflow**, and Financial **Dimensions** or get an overview of **Pictures** attached.

Order Documents, Customer Documents

The screenshot shows the 'Complaint Order' header for 'CO00001 · The Fashion Store UK'. The 'Order Documents' and 'Customer Documents' menus are open. The 'Order Documents' menu shows options: Sales Orders, Sales Return Orders, Posted Invoices, Posted Credit Memos, Posted Return Receipts, and Posted Sales Shipments. The 'Customer Documents' menu shows options: Customer Complaint Documents and Vendor Documents.

Order Documents, Vendor Documents

The screenshot shows the 'Complaint Order' header for 'CO00001 · The Fashion Store UK'. The 'Order Documents' and 'Vendor Documents' menus are open. The 'Order Documents' menu shows options: Purchase Orders, Purchase Credit Memos, Posted Purchase Invoices, Posted Purchase Credit Memos, and Posted Purchase Receipts. The 'Vendor Documents' menu shows options: Vendor Documents and Complaint Line Details.

Under **Related**, you can find all Documents (Open and Posted) that are related to this Complaint. These Documents are divided in **Customer Documents** or **Vendor Documents**.

Customer Complaint Documents, Customer

Complaint Order

CO00001 · The Fashion Store UK

Get Posted Sales L...Lines for Complaint

Approve

Create Documents

Post Sales Documents

Post Purchase Documents

Create & Post All Sales Document

General

Show less

Document No. CO00001

Customer Name The Fashion Store UK

Your Reference

Sell-to

Sell-to Address Station Road, 21

Sell-to Address 2

Sell-to Post Code CB1 2FB

Sell-to City Cambridge

Sell-to Country/Region ... GB

Sell-to County

Bill-to

Bill-to Customer No. 2000

Bill-to Name The Fashion S

Complaint Details

Sales Channel

Received By ADMIN

Date of Receipt 1/1/2024

Shipment Date 1/1/2024

Responsible ID

Status Open

Test Complete Complaint

Complete Complaint

Actions

Related

Automate

Complaint

Order Documents

Customer Complaint Documents

Customer

Complaint Line Details

Document No.

Line No.

Item Details

No.

Complaint Item No

Sales Orders

Sales Return Orders

Posted Invoices

Posted Credit Memos

Posted Return Receipts

Posted Sales Shipments

Under **Related**, all Complaint Documents (Open and Posted) that are related to this Customer (so also Documents that are not related to this specific Complaint, but to other Complaints of the same Customer) can be reviewed.

Complaint Lines

Complaint Lines can be created via [Get Posted Sales Invoice Lines for Complaint](#) or can be entered manually.

Lines	Manage	Line	VarDim	Related Order No.	Functions	Fewer options										
Expand Matrix	Type	No.	Item not Available	Description	Description 2	Invoiced Item No.	Complaint Item No.	Return Item No.	Replacement Item No.	Location Code Replacement Order	Location Code Return Order	Quantity	Unit of Measure Code	Unit Price	Net Amount	Return Reason Code
☒	Matrix	2030	☐	Ella Trousers		2030	2030	2030	2030	BLUE	B-CHOICE	1	PCS	41,00	41,00	DEFECTIVE
☐	Item	20303038	☐	Ella Trousers	Yellow.38	20303038	20303038	20303038	20303038	BLUE	B-CHOICE	1	PCS	41,00	41,00	DEFECTIVE
☒	Matrix	2100	☐	Lily Blouse		2100	2100	2100	2100	BLUE	B-CHOICE	2	PCS	0,00	71,98	WRONG
☐	Item	21009901	☒	Lily Blouse	Black.XS	21009901	21009901	21009902	21009903	BLUE	B-CHOICE	2	PCS	0,00	71,98	WRONG
→ ☐	Item	3200	☐	Sofa Helios 2 Seater			M3240105520	M3240105520	M3240208827	BLUE	B-CHOICE	1	PCS	0,00	0,00	WRONG

Lines	Manage	Line	VarDim	Related Order No.	Functions	Fewer options										
Expand Matrix	Type	No.	Free of Charge	Solution Customer	Solution Vendor	Vendor No.	Rejected	Related Order No.	Concerning Invoice	Concerning Invoice Line	Refund/Return Documents Created	Replacement Documents Created	Purchase Documents Created			
☒	Matrix	2030	☐	Refund on Return + Replacement		2300	☐		103005	42466	☒	☒	☒			
☐	Item	20303038	☐	Refund on Return + Replacement		2300	☐		103005	45680	☐	☐	☐			
☒	Matrix	2100	☐	Refund on Return + Replacement		STD	☐		103006	10000	☒	☒	☒			
☐	Item	21009901	☒	Refund on Return + Replacement		STD	☐		103006	19215	☐	☐	☐			
→ ☐	Item	3200	☒	Refund on Return + Replacement		STD	☐			0	☐	☐	☐			

Most fields are comparable to the columns on other Order Lines. In this paragraph, only the fields are discussed that are specific to the Complaint Lines.

No.

The Item the Customer is complaining about.

If the Item is filled via the [Get Posted Sales Invoice Lines for Complaint](#), the field Invoiced Item No. will also be filled with the same No.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field will be filled based on the **PRODUCT NO.** or the Return.

Item not Available

This Boolean Field shows whether there is availability for this Item to be replaced.

Description / Description 2

The **Description** and **Description 2** will be filled based on the **No.** or **Invoiced Item No.**

Then **Type** is *Master* or *Item*, the fields are filled based on the parameter [Item to be Used as Description](#) in the Sales & Receivables Setup.

Return Item NO. (not default shown in page)

The Item the Customer returns.

I.e., he should have received Item 20303038 but got the wrong Item 20303036.

In that case, the **No.** and **Invoiced Item No** would be 20303038, but the **Return Item No.** would be 20303036.

Another example is regarding a wrong pillow for his sofa: he is complaining about the bought sofa, but he sends back the wrong pillow he received.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field cannot be set separately in the Web Return, only in the Complaint itself.

Replacement Item No. (Not Default shown in Page)

The Item the Customer wants to receive as a Replacement.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field cannot be set separately in the Web Return, only in the Complaint itself.

Location Code Replacement Order

This is the **Location Code** from which a Replacement Sales Order should be shipped.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field cannot be set separately in the Web Return, only in the Complaint itself.

Location Code Return order

This is the **Location Code** in which the returned Items will be received.
Default filled based on the **Return Reason Code**.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field cannot be set separately in the Web Return but will be filled based on the chosen **REASON** of the Return.

Unit Price / Net Amount

If the Complaint Line was taken via [Get Posted Sales Invoice Lines for Complaint](#), it will be filled with the same **Unit Price excl. VAT** from the Posted Sales Invoice Line.
Otherwise, the user needs to determine the **Unit Price** that might have to be credited or replaced.

Return Reason Code

In the Line, a **Return Reason Code** can be entered deviating from the one in the Header.
The **Return Reason Code** on the Line is leading, and can also change the fields **Solution Customer**, **Location Code Return Order** (Default Location Code in the Return Reason Code), **Free of Charge** and **Solution Vendor** again on the Line.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field will be filled with the chosen **REASON** in the Web Return.

Free of Charge

In the Line, the **Free of Charge** Boolean can be entered deviating from the one in the Header. The **Free of Charge** Boolean on the Line is leading.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field cannot be set separately in the Web Return but will be filled based on the chosen **REASON** of the Return.

Solution Customer

For every Complaint Line, a specific **Solution Customer** can be chosen, deviating from the Complaint Header, so that each Complaint Item can have different follow-up actions.
See chapter [Repair Production Order](#) for more details regarding **Solution Customer Repair**.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field will be filled with the chosen **SOLUTION** in the Web Return Line.

Solution Vendor

For every Complaint Line, a specific **Solution Vendor** can be chosen deviating from the Complaint Header, so that each Complaint Item can have different follow up actions towards the Vendor.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field cannot be set separately in the Web Return, only in the Complaint itself.

Vendor

This will be filled with the **Vendor No.** on the Item Card but can be changed.

Rejected

A Complaint can have multiple Complaint Lines. May be not all of them will be approved or rejected. On the Complaint Line you can establish which Complaint Lines should be **Rejected** or not.

Concerning Invoice

With the function **Get Posted Sales Invoice Lines for Complaint**, you can establish for an Item with a Complaint what the **Concerning Invoice** is. This could be different Invoices for each Complaint Line. But you are also able to enter a Posted Sales Invoice manually.

Note

If the Complaint is created based on a Web Return from the TRIMIT B2B Webshop or TRIMIT Sales Agent: This field will be filled with the chosen **DOCUMENT NO.** of the Web Return.

Concerning Invoice Line

With the function **Get Posted Sales Invoice Lines for Complaint**, you can establish for an Item with a Complaint what the **Concerning Invoice Line** is.

But you are also able to enter a Posted Sales Invoice manually.

A **Concerning Invoice Line** can have multiple Complaint Lines connected. This field contains the appropriate Invoice Line of the **Concerning Invoice**.

Refund/Return Documents Created

If a Refund (Sales Credit Memo) and/or Return Order is created, this Boolean will be set to **YES**.

Replacement Documents Created

If Replacement (Sales Order) is created, this Boolean will be set to **YES**.

Purchase Documents Created

If Purchase Documents are created, this Boolean will be set to **YES**.

Actions on Lines / Manage

Lines											
Manage Line VarDim Related Order No. Functions Less options											
Create Documents for Line New Line Delete Line											
	Item	21100106	Sweater Long Sleeve	5	PCS	0.00	13.94		Refund	Replacement	2000
	Matrix	2110	Sweater Long Sleeve	0	PCS	0.00	0.00		Refund	2000	
	Item	21109906	Sweater Long Sleeve	0	PCS	20.75	0.00		Refund	2000	

Create Documents for Line

This Function creates the appropriate Sales-, Purchase- and/or Production Documents for the selected Complaint Line.

New Line/Delete Line

With these Functions, you can create a New Line on the Complaint or remove the selected Complaint Line, respectively.

Actions on Lines /Line

Lines	Manage	Line	VarDim	Related Order No.	Functions	Fewer options									
	Get Posted Sales Invoice Lines for Complaint		Get BOM Component From Invoiced Item No.		Inventory Profile		Dimensions		Bill of Materials		Comments		Pictures		Related Item Tracking

Get Posted Sales Invoice Lines for Complaint

With this Function, a Page opens showing all Sales Invoice Lines for a specific Customer (with **Currency** and **Bill to Customer** on the Header) within the [Horizon, Invoice No. Search](#) set in the Sales & Receivables Setup. From this Page, appropriate Invoice Lines can be selected.

The [Concerning Invoice](#) and [Concerning Invoice Line](#) on the Complaint Line will be populated.

Get BOM Component from Invoiced Item no.

This Function works both on Inventory Items and on Order Configured Items. If the **Complaint Item No.** that must be replaced is different from the **Invoiced Item No.**, for instance in case of a spare part needs to be exchanged or repaired, this Function expands the Bill of Materials of the **Invoiced Item No.** and makes it possible to take back an Item No. from the generated BOM as the No. on the Complaint Lines.

Inventory Profile

This Function shows the **Inventory Profile** of the selected **No.** from the Complaint Line. Note that there is a different view for a *Matrix* Line compared to a Complaint Line of Type *Item*.

Dimensions

Here the **Dimensions** of the selected Complaint Line can be entered.

Bill of materials

With this Function you can view the (temporary) **BOM** for the Item on the selected Complaint Line. This Function does not work on Matrix Lines.

You will be asked the **Specify Item No.** for which you want to see the (temporary) BOM.

Edit - Dialog - CO00003 - 42429			
Specify Item No.	3200		

Comments

In the **Comments**, you can enter Comment Lines attached to selected Complaint Line.

Pictures

With this Function, Pictures can be attached regarding a specific Complaint Item, for instance: details of the damage.

Related Item Tracking

This Function can show you the **Item Tracking Codes** that have been used on the different Documents that have been created based on the current Complaint.

You could get a Dialog to select for which Document you want to see the **Relating Item Tracking Codes**. I.e.:

Return Order

Order

OK

Cancel

If the Document was already Posted, it might look as follows:

View - 20110140 - Posted Item Tracking Lines

Search

Serial No.	Lot No.	Quantity	Warranty Date	Expiration Date
	LOT0004	2		

If the Document was not Posted yet, it might look as follows:

Edit - Item Tracking Lines - 20110140 - Amelia Tracking

Source	Item Tracking	Undefined
Sales Line		
Quantity	2	2
Qty. to Handle	2	2
Qty. to Invoice	2	2
Item Tracking Code	LOTALL	Description Lot specific tracking

Manage

Process

Line

Actions

Related

Fewer options

Availa... Serial No.	Serial No.	Availa... Lot No.	Lot No.	Quantity (Base)	Qty. to Handle (Base)	Qty. to Invoice (Base)	Appl.-to Item Entry
→ Yes		Yes	LOT0003	2	2	2	0

Functions on Lines /VarDim

Lines

Manage

Line

VarDim

Related Order No.

Functions

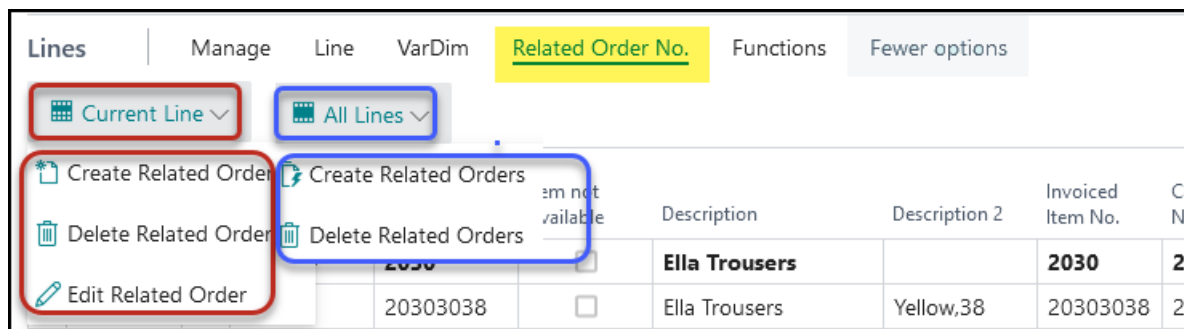
Fewer options

VarDim Order

Matrix

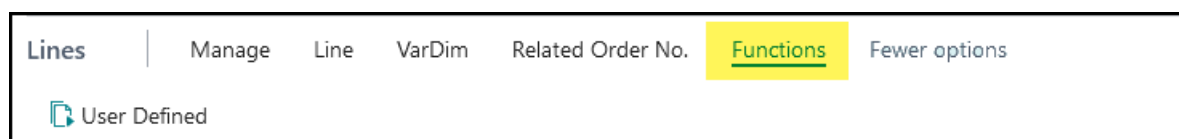
With the Functions below *VarDim*, you can show and enter quantities in a Matrix View, if the selected Complaint Line is of Type **Matrix**. If the selected Complaint Line has/needs Configuration Values, you can show/enter them via **VarDim Order**.

Functions on Lines /Related Order No.



Below the **Related Order No.**, you can find functionality that enables the user to create and maintain Related Orders. This works identical to the same functions on a Sales Order Line.

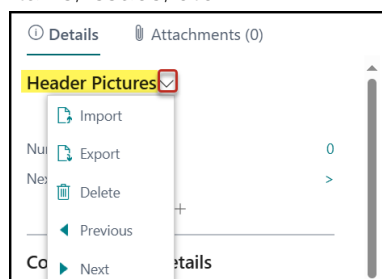
Functions on Lines/Functions



If the system requires extra Functionality regarding Complaint Lines as a **Customization**. TRIMIT has created a Menu **User Defined**. The required Customization can be put under **User Defined**. This keeps the system upgradeable.

FactBox Header Picture

In this FactBox, you can import Pictures that the complaining Customer has send so you can see the flaws, issues, etc.

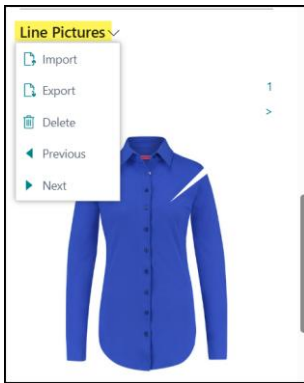


It is also possible to use the FactBox **Drag & Drop** – which can be added via **Personalize**, to import a **Header Picture** or add an **Attachment**.

It is however also possible to add Pictures via the **FactBox Line Picture**, so related to a specific **Item** Line of the Complaint.

FactBox Line Picture

In this FactBox, you can import Pictures that the complaining Customer has send so you can see the flaws, etc.



FactBox Complaint Line Details

The Complaint contains a FactBox called **Complaint Line Details**.

When Sales-/Purchase-/Production Documents are created, it will be possible to see this in the FactBox and view the attached Document.

This can be done for both **Open Documents** and **Posted Documents**. This enables the user to see what has happened on a specific Complaint Line: This is only applicable for Complaint Lines with **Type Item**.

Complaint Line Details	
Document No.	CO00003
Line No.	13214
Item Details	
No.	20303038
Complaint Item No.	20303038
Return Item No.	20303038
Replacement Item No.	20303038
Open Documents	
Sales Order	0100013
Sales Invoice	—
Sales Credit Memo	—
Sales Return Order	1005
Purchase Order	—
Purchase Credit M...	—
Production Order	—
Posted Documents	
Posted Sales Invoice	—
Posted Sales Credit Memo	—
Posted Purchase I...	—
Posted Purchase C...	—
Finished Productio...	—

FactBox Complaint Line Configuration

This FactBox can show the VarDim Order (Configuration) of the Complaint Line of **Type Item**.

Line Configuration		
originText	Shown for Replace...	
VarDim Type	Value	Name
S_PILLOW	20	Large
SEAT_MAT	88	Fabric
SEAT_COL	27	Navy

Repair Production Order

If you create a Complaint Line with **Customer Solution** = *Repair*, a related Production Order will be created for the **Item for Repair Production Order** of the Sales & Receivables Setup.

If the parameter **Reverse Production Entry** in the Sales & Receivables Setup is set to Yes, the system can automatically post a **Negative Adjustment** in the Item Ledger Entries when Finishing the *Repair* Production Order, so no Inventory is created for this special Item.

This is also happening for the Value Entries.

If the parameter **Reverse Production Entry** in the Sales & Receivables Setup is set to No, the system will only post an **Output** in the Item Ledger Entries and Value Entries when Finishing the *Repair* Production Order. This is necessary when using **Tracking Codes** (Lot Nos. or Serial Nos.) for the *Repair Item*.

For this scenario, it is best to set the **Costing Method** for this *Repair Item* to *Standard* with a **Standard Unit Cost** of 0 (zero).

Therefore, the Inventory for the *Repair Item* will remain 0 (zero). I.e.:

After you created the Complaint, **Approved** it, and clicked **Create Documents** a **Related Order No.** is created on the Complaint Item Line:

Complaint Order
CO00001 · The Fashion Store UK

Get Posted Sales L...Lines for Complaint ☒ Approve ☒ Create Documents ☐ Post Sales Documents ☐ Post Purchase Documents ☐ Create & Post All Sales Document ☐ Test Complete Complaint ☒ Complete Complaint More options

General > The Fashion Store UK DEFECTIVE Repair

Lines Manage Line VarDim Related Order No. Functions

Create Documents for Line New Line Delete Line

Exp. Mat.	Type	No.	Item not Avail.	Description	Description 2	Location Code Replacement Order	Location Code Return Order	Quantity	Unit of Measure Code	Unit Price	Net Amount	Return Reason Code	Free of Charge	Solution Customer	Solution Vendor	Vendor No.	Reje...	Related Order No.	Concerning Invoice
☒	Matrix	2000	☐	Olivia Trousers			B-CHOICE	1	PCS	37.00	37.00	DEFECTIVE	☐	Repair		STD	☐		
☐	Item	20002036	☐	Olivia Trousers	Royal Blue.36		B-CHOICE	1	PCS	37.00	37.00	DEFECTIVE	☐	Repair		STD	☐	PC000001	103226

And to repair this Lily Blouse we need some buttons and sew them:

Production Order
PC000001 · REPAIR · Repair Master for Complaints

Finish Job Card... Release Prod. Order Archive Order Check Availability Update Unit Cost Item Tracking Lines Inventory Profile Actions Related Reports Automate Fewer options

General Show more

No. PC000001 Status New

Document Type Order Quantity to Produce 1

Item No. REPAIR Outstanding Quantity (Base) 1

Item Description Repair Master for Complaints Quantity Finished 0

Item Description 2 - Quantity to Finish 0

Schedule

Availability Date 6/4/2025 Update Status to

Start Week 23 Posting Date

Start Date 6/4/2025

End Date 6/4/2025

Lines Manage Line VarDim Related Order No. Functions

New Line Delete Line

Type	No.	Description	Description 2	Quantity per	Unit of Measure Code	Unit Cost Total	Calculated Consumption Qty.	Quantity to Consume	Complete Qty. to Consume	Quantity Consumed	Outstanding Quantity	Related Order No.	Vendor No.
Item	M220025	Buttons 0.5" Acrylic	Blue	2	PCS	0.07	2	2	☐	0	2	--	2000
Operation	300080	Sew		2	MIN	0.66	2	2	☐	0	2	--	

References		Initiation - Start level		Initiation - Overlying level	
Initiating Order Type Start Level	Complaint Line	Initiating Order Type Overlying Level	Complaint Line		
Initiating Document Type Start Level	Quote	Initiating Document Type Overlying Level	Quote		
Initiating Order No. Start Level	CO00001	Initiating Order No. Overlying Level	CO00001		
Date of Initiating Order	4/14/2025	Initiating Order Line No. Overlying Level		11508	
Initiating Order Line No. Start Level		Quantity at Overlying Level			1
Item Related info					
MRP Method	Order				
Master No.	REPAIR				

After posting the Consumptions, Finishing and Closure of the Production Order, you will see the following Item Ledger Entries – assuming **Reverse Production Entry** was Yes:

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Brand Code	Season Code	Locat... Code	Quantity	Invoiced Quantity	Remaining Quantity	Sales Amount (Actual)	Cost Amount (Actual)	Cost Amount (Non-Invtbl)	Open
6/4/2025	Negative Adjmt.		PC000001	REPAIR	Repair Master for Complaints	FASHION		BLUE	-1	-1	0	0.00	-0.73	0.00	☐
6/4/2025	Output		PC000001	REPAIR	Repair Master for Complaints	FASHION		BLUE	1	1	0	0.00	0.73	0.00	☐
6/4/2025	Consumption		PC000001	M220025	Buttons 0,5" Acrylic	FASHION		BLUE	-2	-2	0	0.00	-0.07	0.00	☐

And the Value Entries (based on special Gen. Prod. Posting Group and Inventory Posting Group for the Repairs) could look as follows – assuming **Reverse Production Entry** was Yes:

Posting Date	Item Ledger Entry Type	Entry Type	Adjustment	Document Type	Document No.	Item Charge No.	Description	Sales Amount (Actual)	Cost Amount (Expected)	Cost Amount (Actual)	Cost Amount (Non-Invtbl)	Cost Posted to G/L	Item Ledger Entry Quantity	Valued Quantity	Invoiced Quantity	Cost per Unit	Cost per Unit (ACY)	Item No.
6/4/2025	Negative Adjmt.	Direct Cost	☒		PC000001			0.00	0.00	-0.73	0.00	-0.73	0	-1	0	0.73	0.00	REPAIR
6/4/2025	Output	Direct Cost	☐		PC000001			0.00	0.00	0.73	0.00	0.73	0	1	1	0.73	0.00	REPAIR
6/4/2025	Negative Adjmt.	Direct Cost	☐		PC000001			0.00	0.00	0.00	0.00	0.00	-1	-1	-1	0.00	0.00	REPAIR
6/4/2025	Output	Direct Cost	☐		PC000001			0.00	0.00	0.00	0.00	0.00	1	1	0	0.00	0.00	REPAIR
6/4/2025		Direct Cost	☐		PC000001		Sew	0.00	0.00	0.66	0.00	0.66	0	1.9998	1.9998	0.33	0.00	
6/4/2025	Consumption	Direct Cost	☐		PC000001			0.00	0.00	-0.07	0.00	-0.07	-2	-2	-2	0.035	0.00	M220025

And the General Ledger Entries could look as follows = assuming **Reverse Production Entry** was Yes:

Posting Date	Document Type	Document No.	G/L Account No.	G/L Account Name	Description	Brand Code	Season Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount (LCY)	Bal. Account Type	Bal. Account No.	VAT Date	Entry No.
6/4/2025		PC000001	2120	Finished Goods	Direct Cost REPAIR on 06/04/25	FASHION					-0.07	G/L Account		6/4/2025	11041
6/4/2025		PC000001	2120	Finished Goods	Direct Cost REPAIR on 06/04/25	FASHION					0.73	G/L Account		6/4/2025	11045
6/4/2025		PC000001	2120	Finished Goods	Direct Cost REPAIR on 06/04/25	FASHION					-0.73	G/L Account		6/4/2025	11047
6/4/2025		PC000001	2140	WIP Account, Finished Goods	Direct Cost REPAIR on 06/04/25	FASHION					0.07	G/L Account		6/4/2025	11042
6/4/2025		PC000001	2140	WIP Account, Finished Goods	Direct Cost REPAIR on 06/04/25	FASHION					0.66	G/L Account		6/4/2025	11043
6/4/2025		PC000001	2140	WIP Account, Finished Goods	Direct Cost REPAIR on 06/04/25	FASHION					-0.73	G/L Account		6/4/2025	11046
6/4/2025		PC000001	7170	Inventory Adjmt., Retail	Direct Cost REPAIR on 06/04/25	FASHION					0.73	G/L Account		6/4/2025	11048
6/4/2025		PC000001	7791	Direct Cost Applied, Capacity	Direct Cost REPAIR on 06/04/25	FASHION					-0.66	G/L Account		6/4/2025	11044

The total on **G/L Account No. 2120** regarding the *Repair Item* is 0 (zero).

Complaint Reports

Complaint Statistics

This **Complaint Statistics** will show the Statistics of the Complaints:
How many Items were sold, and for how many did you receive a Complaint and with which Return Reason Code. These Statistics will include Open and Completed Complaints.
You can find this report via **Search Complaint Statistics**.
The **Request Page** looks as follows:

Complaint Statistics

Printer

(Handled by the browser)

Print For

Customer

Specify

- Specified for the Field

Master No.

Return Reason Code Specific

Complaint in Period, From:

Complaint in Period, To:

Sales in Period, From:

Sales in Period, To:

Filter: Integer

Advanced

Send to...

Print

Preview

Cancel

Description of the Option Fields:

Print For

You can choose between the following six options:

Customer	The report will be sorted per Customer
Vendor	The report will be sorted per Vendor for which Credit Memos have been created
Item No.	The report will be sorted per Item Number of the Complaint Line
Master No.	The report will be sorted per Master Number of the Complaint Line
Complaint Item	The report will be sorted per Complaint Item Number of the Complaint Line
Invoiced Item No.	The report will be sorted per Invoiced Item Number of the Complaint Line

Specify

You need to enter a checkmark in this Option if you want to have detailed information per **Specified for the Field** within a **Print For**.

Specified for the Field

This field determines the second level in the report, beneath the chosen **Print For**. The same options apply as for the **Print For**: *Customer, Vendor, Item No., Master No., Complaint Item, and Invoiced Item No.*

Return Reason Code Specific

With this Boolean set on **YES**, the Statistics will show the details per **Return Reason**

Complaint in Period, From and Complaint in Period, To

These Dates determine the Filter for the Complaint Lines that needs to be printed based on the **Date of Receipt** from the Complaint.

Sales in Period, From and Sales in Period, To

These Dates determine the Filter for the Item Ledger Entries that needs to be printed based on the **Posting Date** to determine the **Quantity Sold** in the report.

Therefore, a Filter on the Invoiced Items. You can find an example below.

Complaint Statistics		Date: 5-7-2022				
CRONUS TRIMIT W1 Ltd.		Time: 09:17:48				
		ADMIN				
		Page: 1				
Customer		Complain Qty.	Qty. Sold	Complain Pct.	Complain Cost	Qty. per Reason
2000	The Fashion Store UK	15	93	16,13	317,54	0
Master No.						
2011	Amelia Tracking	2	5	40	66	2 DEFECTIVE
2030	Ella Trousers	3	2	150	60	3 DEFECTIVE
2100	Lily Blouse	9	86	10,47	159,82	7 DEFECTIVE
						2 WRONG
M3240	Sofa Pillow	1	0	0	31,72	1 WRONG
List Total		15,00	93,00	16,13	317,54	

Description of the Report Fields:

Quantity Complaint

The total Quantity of the Complaint Lines.

Quantity Sold

The total Quantity Invoiced of the Items, based on Item Ledger Entries.

Complaint Pct.

Calculated based on **Quantity Complaint / Quantity Sold * 100**

Complaint Cost

Unit Cost of the Item multiplied by the **Quantity Complaint**

Qty. per Reason

Per **Return Reason Code**, which will only be shown if the **Return Reason Code Specific** will be set to Yes, the quantity will be shown.

Complaint Data

This Report provides an overview of **Complaint** information.
You can find this report via **Search Complaint Data**.

The **Request Page** looks as follows:

Complaint Data

Printer : (Handled by the browser)

Filter: Complaint Header

× Document No. :

×

× Sell-to Customer No. :

×

+ Filter...

Advanced >

Send to...

Print

Preview & Close

Cancel

In this Request Page, you can set Filters on any field of the **Complaint Header**.

An example of the result after running this Report is shown below. You can see every **Complaint** broken down on **Item** level on attached **Sales** Document. You can see the **Replacing Items**, the **Quantity**, the Person Responsible (**User**), **Receipt Date** of the Complaint Item and the **Status**.

COMPLAINT REPORT		Date	5-7-2022
CRONUS TRIMIT W1 Ltd.			ADMIN
Complaint No. : C000002			
Person Responsible :		Received By :	ADMIN
Customer No. : 2000		Receipt Date: :	1-1-2022
		Status :	Approved
Sales Item :		Quantity :	3 PCS
Complaint Item :	21002003		
Complaint Component: :	21002003	Complaint Reason Code :	DEFECTIVE
		Solution :	
Complaint No. : C000003			
Person Responsible :		Received By :	ADMIN
Customer No. : 2000		Receipt Date: :	1-1-2022
		Status :	Approved
Sales Item :	20303038	Quantity :	1 PCS
Complaint Item :	20303038		
Complaint Component: :	20303038	Complaint Reason Code :	DEFECTIVE
		Solution :	Refund on Return + Replacement
Sales Item :	21009901	Quantity :	2 PCS
Complaint Item :	21009901		
Complaint Component: :	21009903	Complaint Reason Code :	WRONG
		Solution :	Refund on Return + Replacement
Sales Item :	3200	Quantity :	1 PCS
Complaint Item :	M3240105520		
Complaint Component: :	M3240208827	Complaint Reason Code :	WRONG
		Solution :	Refund on Return + Replacement