WHITE PAPER

Complaints

TRIMIT version: 26.1
Date: July 30, 2026

TRIMIT

Table of Contents

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.*

TRIMIT Complaints can track all these follow-up processes.

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 also possible to register Returns with the **TRIMIT B2B Webshop** and **TRIMIT Sales Agent**, which will be submitted to the ERP as a Complaint.
See ***White Paper – TRIMIT Web Returns*** for more details.

The **TRIMIT Complaints** are not suitable for your complaints towards your suppliers; only for your customers' complaints towards you.

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 26.1 for Business Central W1 BC28.X**.
The pictures in this White Paper are based on the demo data for **TRIMIT 26.1,** which is based on Microsoft Dynamics 365 Business Central 2026 Release Wave 1, 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*	*Return Reasons*
	6036492	*trm API Complaint Header*
	6036493	*trm API Complaint Line*
	6036673	*trm Complaint Line Relation*
	6036674	*trm Complaint Header*
	6036675	*trm Complaint Line*
	6036677	*trm Complaint Buffer*
	6036688	*trm Complaint Line Rel. Compl.*
	6036689	*trm Complaint Header Completed*
	6036690	*trm Complaint Line Completed*
	6037179	*trm Order Picture Info*
The pages	*6036688*	*trm Compl.SalesLine Disc Comb*
	6036692	*trm Complaint Order*
	6036993	*trm Complaint Order Subform*
	6036995	*trm Complaint Orders List*
	6036696	*trm Completed Complaint List*
	6036697	*trm Completed Complaint*
	6036698	*trm Complaint Order Lin Compl*
	6036819	*trm Complaint Document FactBox*
	6036825	*trm Complaint Line FactBox*
	6036826	*trm Complaint Compl FactBox*
	6036827	*trm Complaint Line Con FactBox*
	6036828	*trm Complaint ComplDoc FactBox*
	6037191	*trm Order Picture List*
	6038006	*trm Dialog Complaint Line*
The reports	*6036689*	*trm Complaint Data*
	6036691	*trm Complaint Statistics*
The codeunits	*6036729*	*trm Complaint Handling*
	6038012	*trm API Complaint Create*

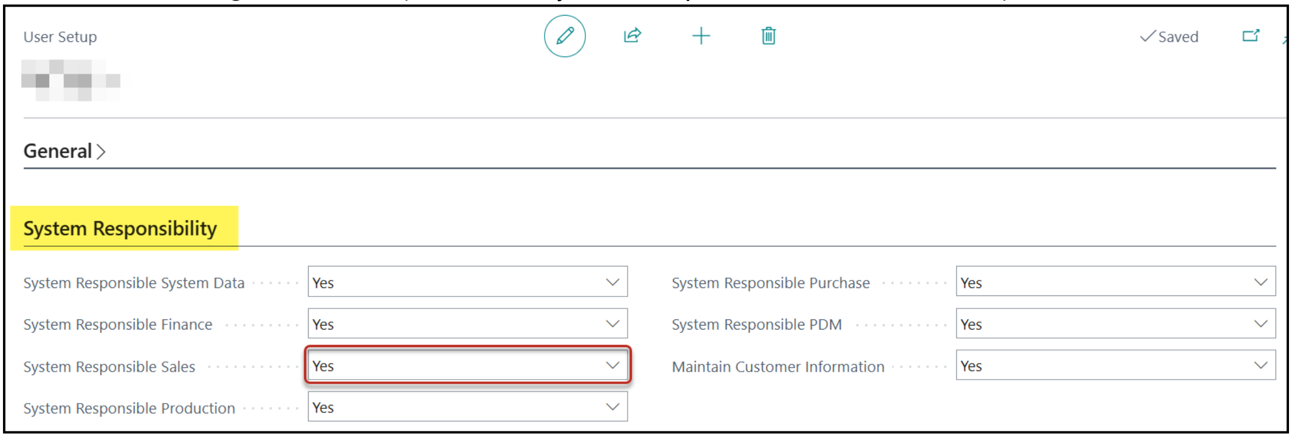
Besides these special objects, also other objects have been customized for TRIMIT Complaints, like i.e., the pages of the Sales Order, Sales Credit Memo, Posted Sales Invoice and Posted Credit Memo: a field **Complaint** indicating that the document is related to a Complaint Yes/No.

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*.



System Responsible Sales

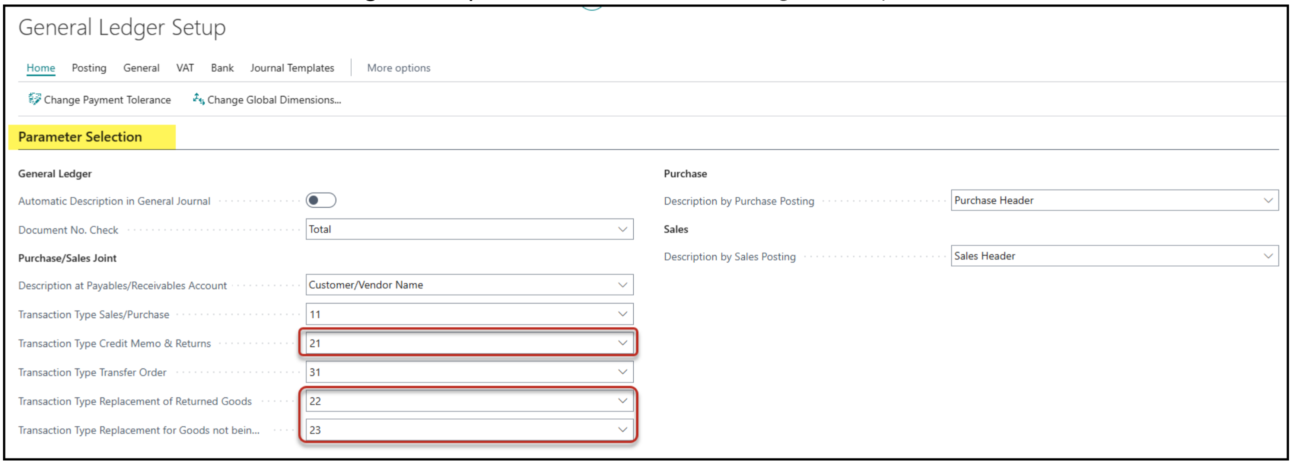
This Parameter set to *Yes* opens the possibility to change fields or delete records.
If set to *No* the fields cannot be changed or action cannot be carried out:

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*.



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 *Refund on Return + Replacement* when the field **EU Country/Region Code** of the Sell-To/Buy-From Country/Region is filled.

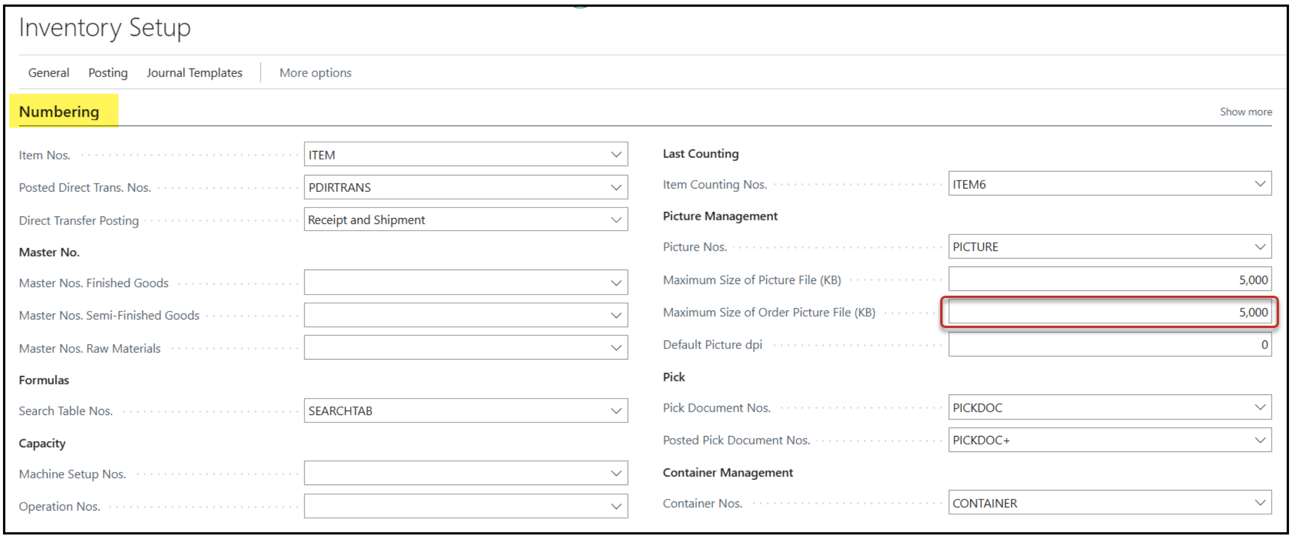
Transaction Type Replacement for Goods not being Returned

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 New Item to Customer	**Sales Credit Memo** No Item returned	**Return Order** Credit Memo when Item is returned	**Production Order**
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

Inventory Setup


Inventory Setup

General | Posting | Journal Templates | More options

Numbering — Show more

Item Nos.	ITEM
Posted Direct Trans. Nos.	PDIRTRANS
Direct Transfer Posting	Receipt and Shipment
Master No.	
Master Nos. Finished Goods	
Master Nos. Semi-Finished Goods	
Master Nos. Raw Materials	
Formulas	
Search Table Nos.	SEARCHTAB
Capacity	
Machine Setup Nos.	
Operation Nos.	
Last Counting	
Item Counting Nos.	ITEM6
Picture Management	
Picture Nos.	PICTURE
Maximum Size of Picture File (KB)	5,000
Maximum Size of Order Picture File (KB)	5,000
Default Picture dpi	0
Pick	
Pick Document Nos.	PICKDOC
Posted Pick Document Nos.	PICKDOC+
Container Management	
Container Nos.	CONTAINER

Maximum Size of Order Picture File (KB)

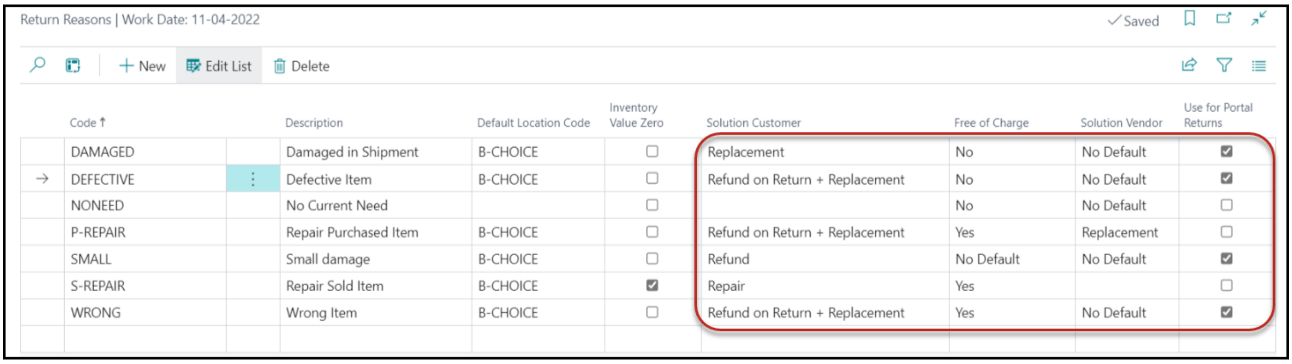
The Parameter **Maximum Size of Order Picture File (KB)** is to set the maximum size for the Order Picture that can be created via TRIMIT e-commerce for configured Items or related to a Web Return or uploaded to a Complaint or Order in the ERP.

This means that if the original picture might be bigger, it will automatically be rescaled to this maximum value. The default value will be set to *5,000 KB*, so *5 MB*.

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** or **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 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
For a **Web Return** on the **TRIMIT B2B Webshop** or **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 on 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.*

Use for Portal Returns

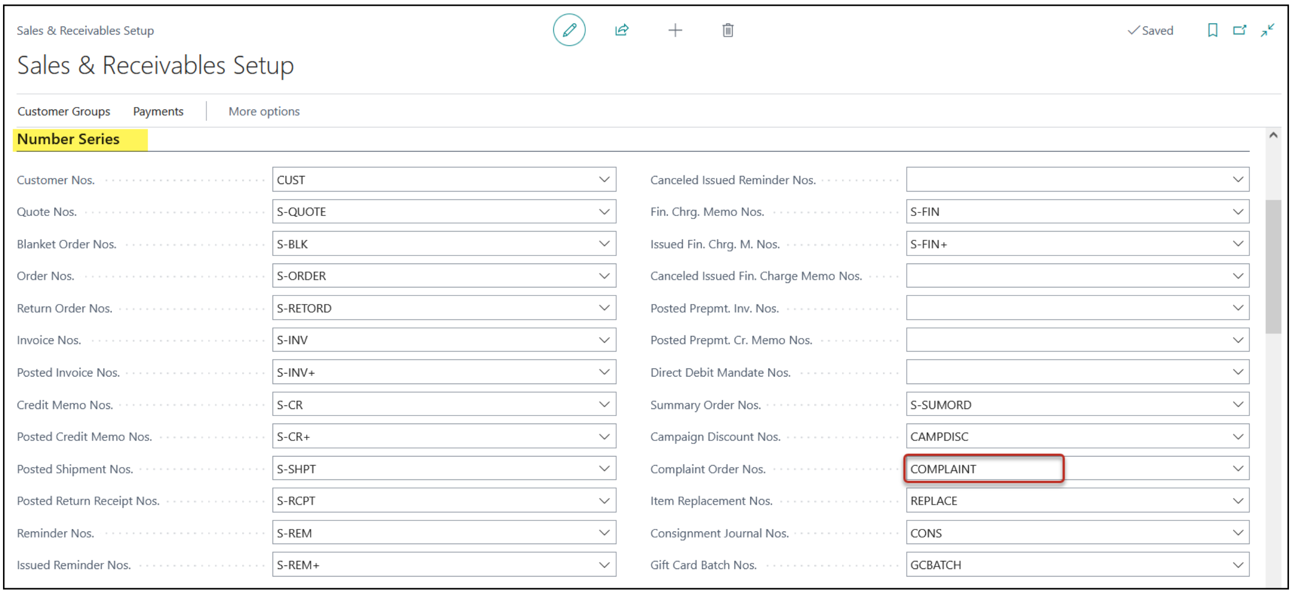
Setting this field to *TRUE* means that this specific **Return Reason** can be chosen by the Customer in the **TRIMIT B2B Webshop** for the **TRIMIT Web Return**.
Setting this field to *TRUE* means that this specific **Return Reason** can be chosen by the Salesperson in the **TRIMIT Sales Agent** for the TRIMIT **Web Return**.

If none of the **Return Reasons** is set to *TRUE*, they all can be chosen in the TRIMIT Web Returns.

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*.

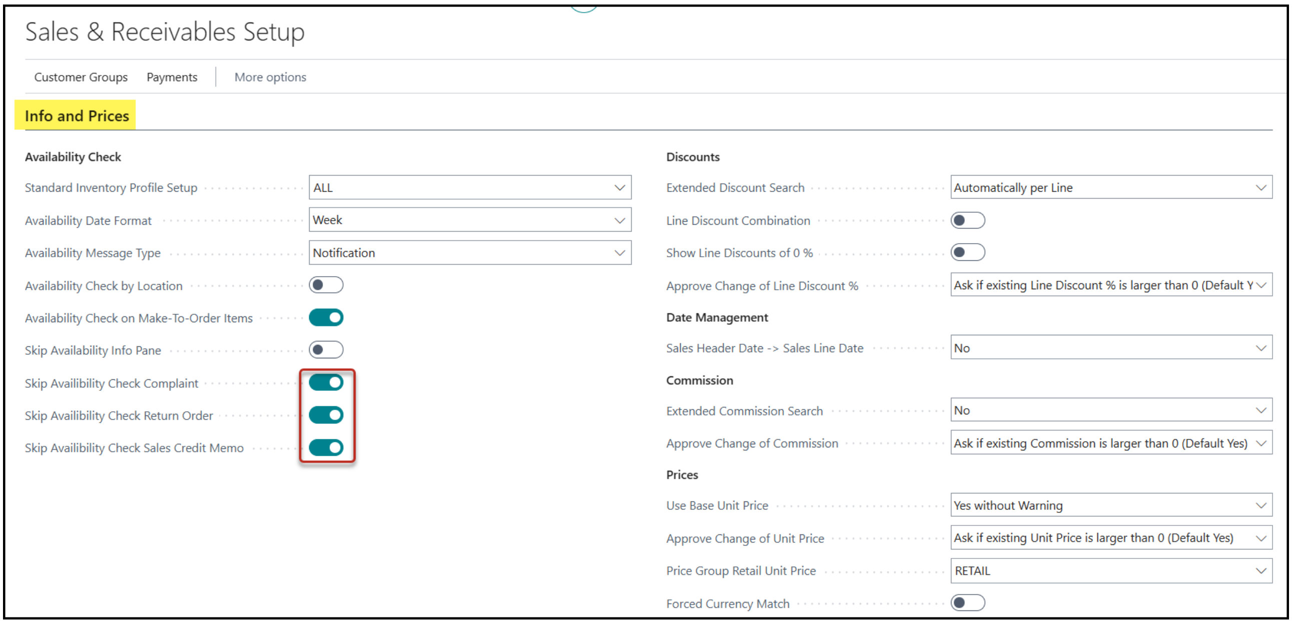
FastTab Number Series



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



Skip Availability Check Complaint

This Parameter determines the field **Skip Availability Check** in the Complaint Header.
If you choose *Yes*, the **Skip Availability Check** will also be set to *Yes* in the Complaint Header, and Availability will not be calculated/checked for the Complaint Lines.

If you choose *No* the **Skip Availability Check** in the Complaint Header will also be set to *No*, and Availability will be calculated/checked.
If many customers ask for a **Replacement** for their Complaint, you might consider setting this Parameter to *No*.

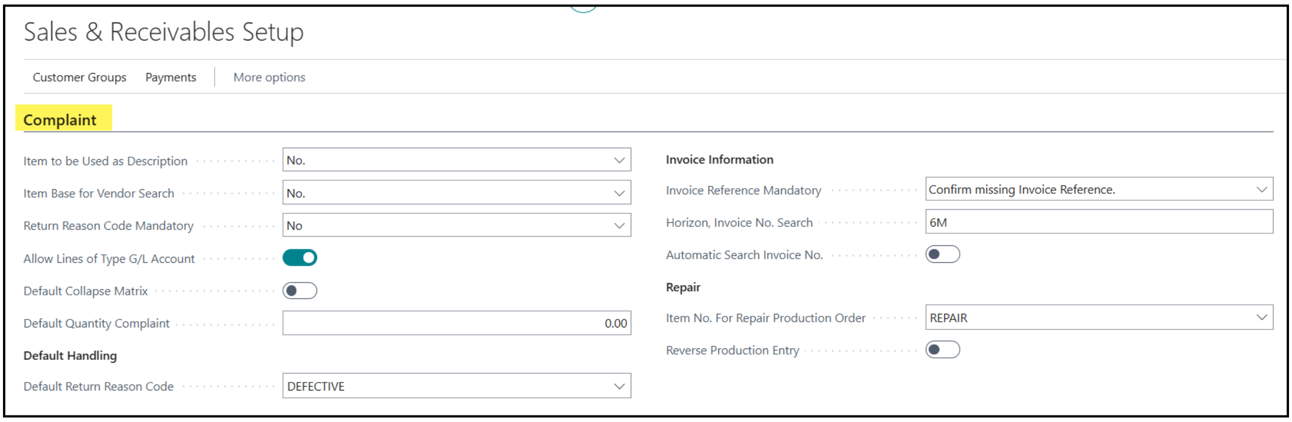
Skip Availability Check Return Order

This Parameter determines the field **Skip Availability Check** in the Sales Return Header.
This field is not shown by default, but you can add it to the page via ***Personalize.***
If you choose *Yes*, the **Skip Availability Check** will also be set to *Yes* in the Sales Return Header, and Availability will not be calculated/checked for the Sales Return Order Lines.
If you choose *No*, the **Skip Availability Check** will also be set to *No* in the Sales Return Header, and Availability will be calculated/checked.

Skip Availability Check Sales Credit Memo

This Parameter determines the field **Skip Availability Check** in the Sales Credit Memo.
This field is not shown by default, but you can add it to the page via ***Personalize.***
If you choose *Yes*, the **Skip Availability Check** will also be set to *Yes* in the Sales Credit Memo, and Availability will not be calculated/checked for the Sales Credit Memo Lines.
If you choose *No*, the **Skip Availability Check** will also be set to *No* in the Sales Credit Memo, and Availability will be calculated/checked.

FastTab Complaint



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

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. 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.

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

Horizon, Invoice No. Search

If the ***Get Posted Sales Invoice Lines for Complaint*** 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.**

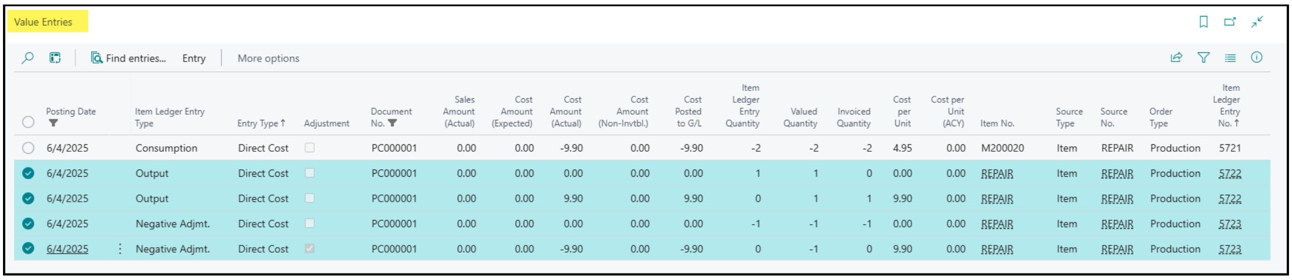
Item No. for Repair Production

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.,

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

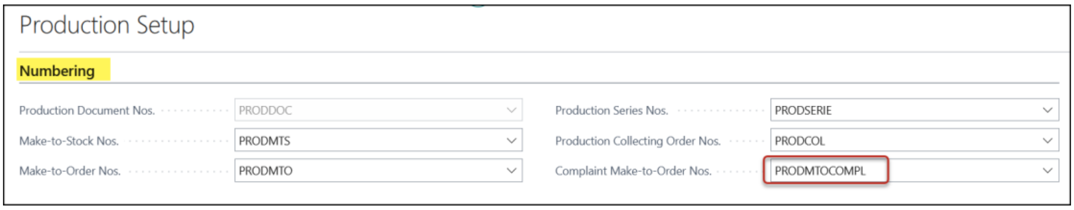
Posting Date	Item Ledger Entry Type	Entry Type	Adjustment	Document No.	Sales Amount (Actual)	Cost Amount (Expected)	Cost Amount (Actual)	Cost Amount (Non-Invtbl.)	Cost Posted to G/L	Item Ledger Entry Quantity	Valued Quantity	Invoiced Quantity	Cost per Unit	Cost per Unit (ACY)	Item No.	Source Type	Source 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

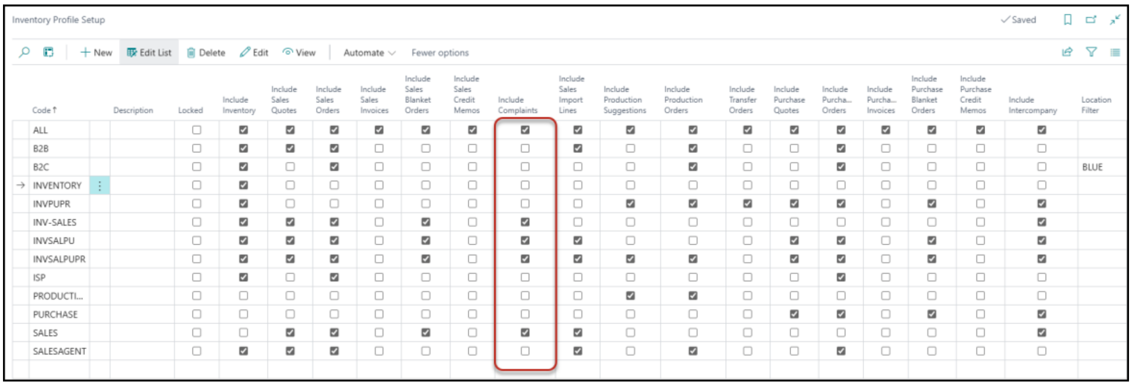
Complaint Make-to-Order Nos.

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.

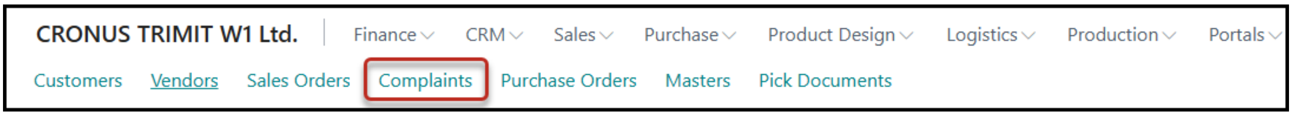


Inventory Profile Setup

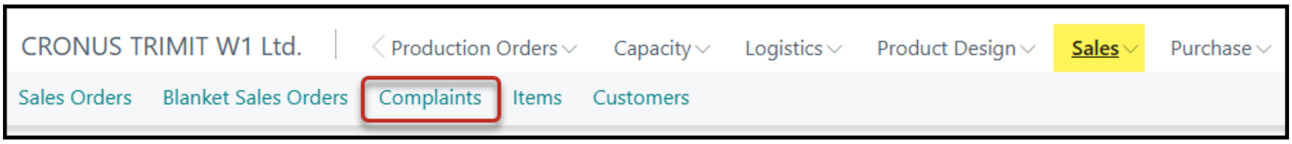
Code	Description	Locked	Include Inventory	Include Sales Quotes	Include Sales Orders	Include Sales Invoices	Include Sales Blanket Orders	Include Sales Credit Memos	Include Complaints	Include Sales Import Lines	Include Production Suggestions	Include Production Orders	Include Transfer Orders	Include Purchase Quotes	Include Purcha... Orders	Include Purcha... Invoices	Include Purchase Blanket Orders	Include Purchase Credit Memos	Include Intercompany	Location Filter
ALL		☐	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	☑	
B2B		☐	☑	☑	☑	☐	☐	☐	☐	☑	☐	☑	☐	☐	☑	☐	☐	☐	☐	
B2C		☐	☑	☐	☑	☐	☐	☐	☐	☐	☐	☑	☐	☐	☑	☐	☐	☐	☐	BLUE
INVENTORY		☐	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	
INVPUPR		☐	☑	☐	☐	☐	☐	☐	☐	☐	☑	☑	☑	☑	☑	☐	☑	☐	☑	
INV-SALES		☐	☑	☑	☑	☐	☑	☐	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☑	
INVSALPU		☐	☑	☑	☑	☐	☑	☐	☑	☑	☐	☐	☐	☑	☑	☐	☑	☐	☑	
INVSALPUPR		☐	☑	☑	☑	☐	☑	☐	☑	☑	☑	☑	☐	☑	☑	☐	☑	☐	☑	
ISP		☐	☑	☐	☑	☐	☐	☐	☐	☐	☐	☐	☐	☐	☑	☐	☐	☐	☐	
PRODUCTI...		☐	☐	☐	☐	☐	☐	☐	☐	☐	☑	☑	☐	☐	☐	☐	☐	☐	☐	
PURCHASE		☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☐	☑	☑	☐	☑	☐	☑	
SALES		☐	☐	☑	☑	☐	☑	☐	☑	☑	☐	☐	☐	☐	☐	☐	☐	☐	☑	
SALESAGENT		☐	☑	☑	☑	☐	☐	☐	☐	☑	☐	☑	☐	☐	☑	☐	☐	☐	☐	

Complaint

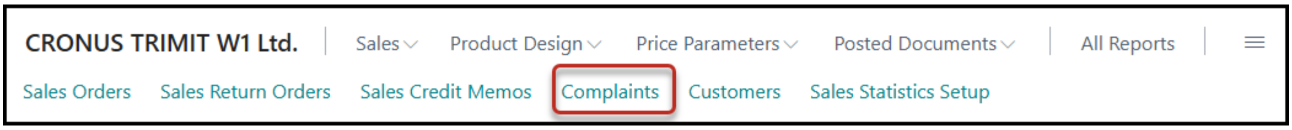
The **Complaints** can be found via **Search** *Complaint Order List* but also in the Role Center *TRIMIT Small Business* directly.



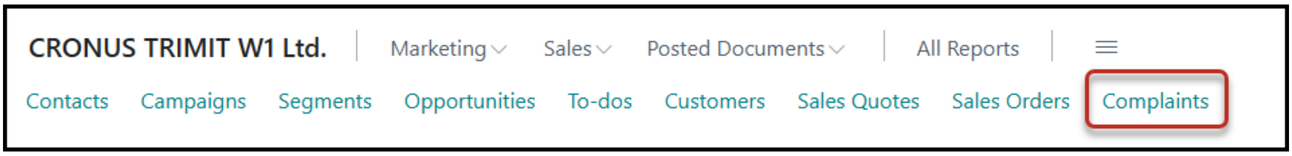
And in the Role Center *TRIMIT Production*, under *Sales.*



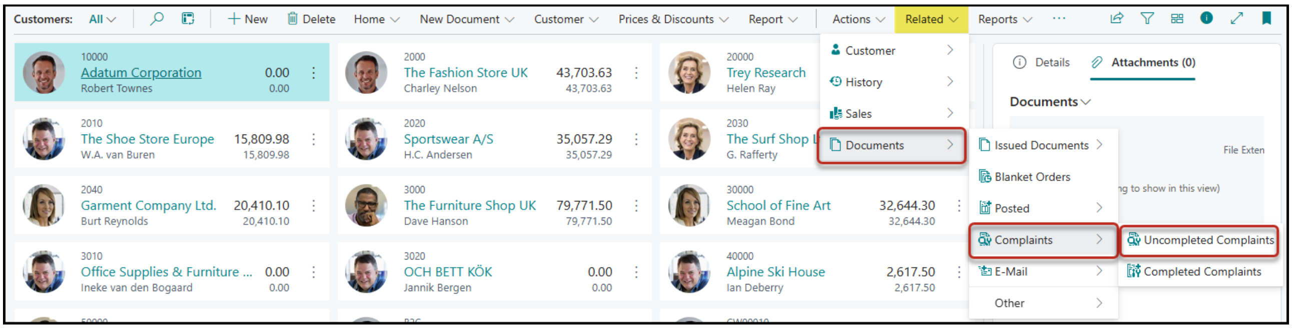
And in the Role Center *TRIMIT Customer Service.*



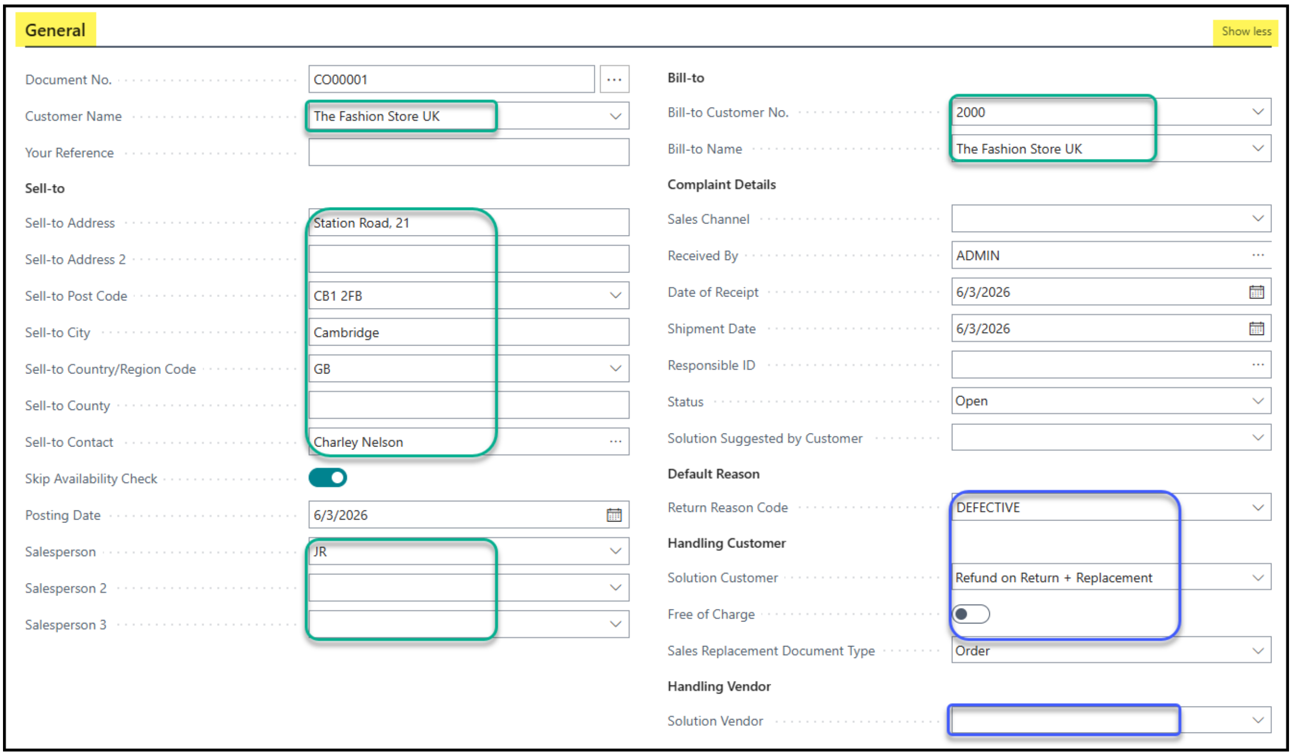
And in the Role Center *TRIMIT CRM.*



And you are able to see and even create/maintain the Complaints of a specific Customer via the Customer List/Card:



FastTab General



Document No.

With pressing **<Enter>**, an automatic Number can be created for a new Complaint based on the Parameter **Complaint Order Nos.** 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, you can fill in a Reference that the Customer has given for this Complaint.

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 Sales Credit Memo or Sales Return Order.

The default for this field can be set in the Sales & Receivables Setup with the Parameter **Skip Availability Check Complaints**

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 Sales Credit Memo, Sales Order, Sales Return Order, Sales Invoice, Purchase Order or Purchase Credit Memo when you create the Documents for this 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.

> Note
> If the Complaint is created based on a **Web Return** on the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, the **Sales Channel** will be filled with the **Sales Channel** of the Portal Profile for the applicable TRIMIT B2B Webshop or TRIMIT 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** on the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, the **Received By** will be filled with **User/Client ID** of the connection between the ERP and the e-commerce 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.

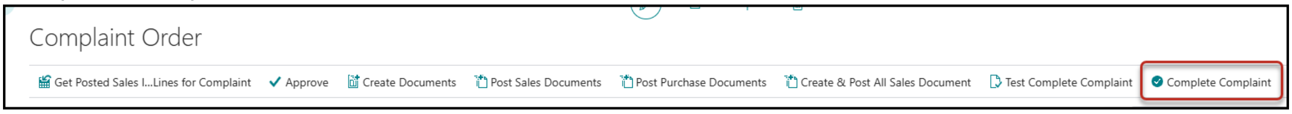
Responsible ID

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

If the Complaint gets **Status** *Rejected*, you can immediately Complete the Complaint by clicking ***Complete Complaint***.



See Complete Complaint for more details.

Solution Suggested by Customer

The Customer may have a preference regarding how to solve the Complaint.
This can be a *Refund* (Sales Credit Memo)or a *Replacement* (Sales Order).

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** on the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, the **Return Reason Code** will be filled with the **REASON** from the first product in the Web Return.

Solution Customer

In the field **Solution Customer,** the appropriate solution must be filled in 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** on the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, the **Customer Solution** will be filled with the **SOLUTION** from the first product in 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** on the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, it will be filled in based on the chosen **REASON** from the first product in 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 will be created to replace the Item of Complaint.
Invoice	A Sales Invoice will be created to replace the Item of Complaint.

Solution Vendor

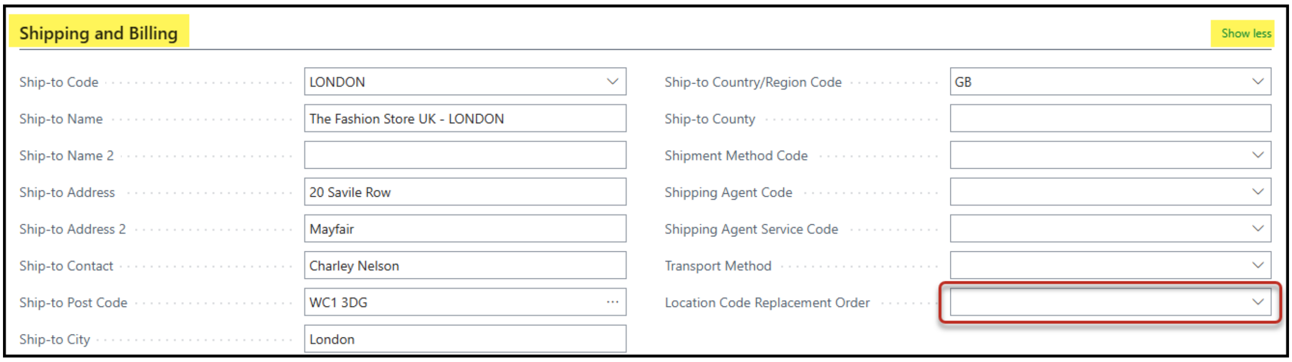
There are four options on how to handle actions towards the Vendor in case of a customer's Complaint. If the *Blank* option is chosen, it means that there are no actions towards the Vendor.

	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.



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

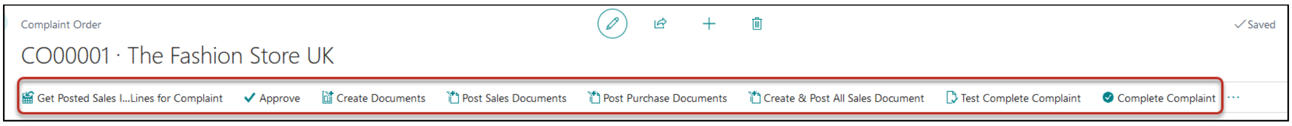
Most of the fields will be copied from the entered **Customer Name**.

Comment

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

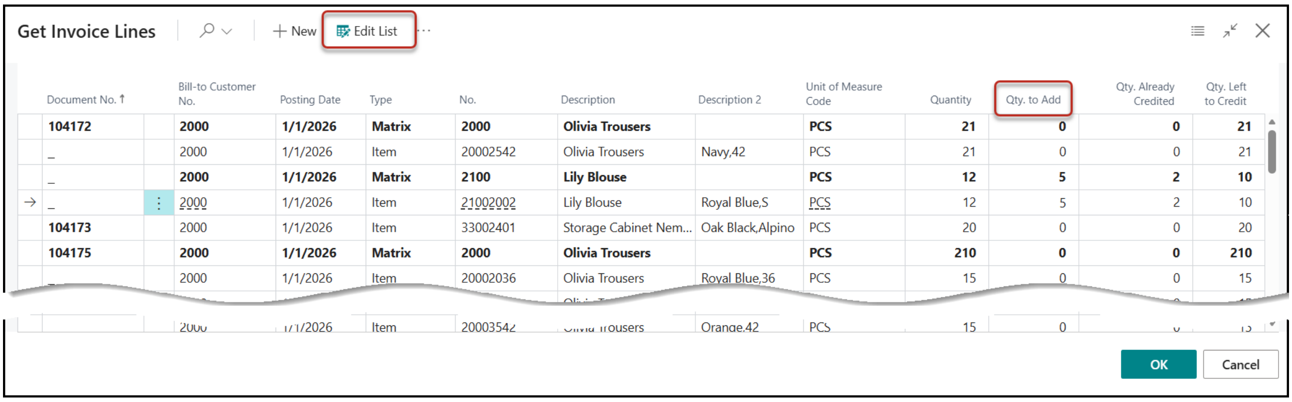
Functions on Complaint Header

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



Get Posted Sales Invoice Lines for Complaint

With this Function, a Page opens showing all Posted 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.



Document No. ↑	Bill-to Customer No.	Posting Date	Type	No.	Description	Description 2	Unit of Measure Code	Quantity	Qty. to Add	Qty. Already Credited	Qty. Left to Credit
104172	2000	1/1/2026	Matrix	2000	Olivia Trousers		PCS	21	0	0	21
_	2000	1/1/2026	Item	20002542	Olivia Trousers	Navy,42	PCS	21	0	0	21
_	2000	1/1/2026	Matrix	2100	Lily Blouse		PCS	12	5	2	10
_	2000	1/1/2026	Item	21002002	Lily Blouse	Royal Blue,S	PCS	12	5	2	10
104173	2000	1/1/2026	Item	33002401	Storage Cabinet Nem...	Oak Black,Alpino	PCS	20	0	0	20
104175	2000	1/1/2026	Matrix	2000	Olivia Trousers		PCS	210	0	0	210
_	2000	1/1/2026	Item	20002036	Olivia Trousers	Royal Blue,36	PCS	15	0	0	15
	2000	1/1/2026	Item	20003542	Olivia Trousers	Orange,42	PCS	15	0	[illegible]	[illegible]

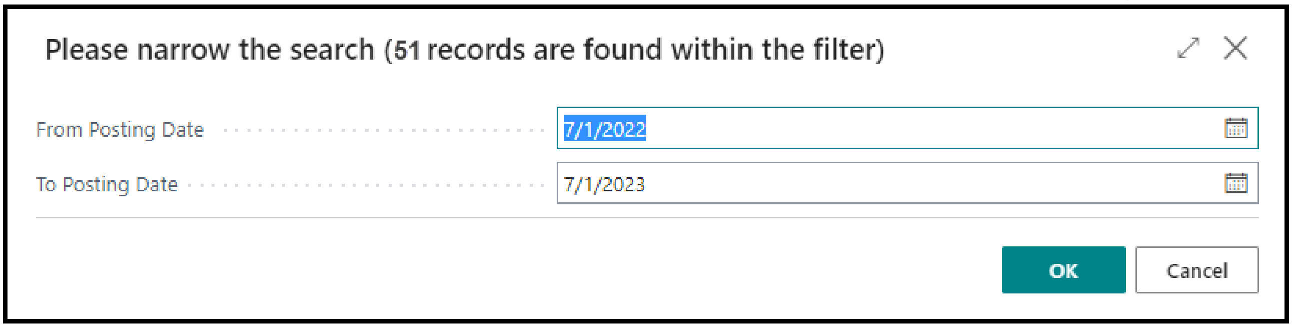
After clicking *Edit List*, you can also already fill in the **Qty. to Add**, which will become the **Quantity** in the Complaint Line that the Customer is complaining about.

Quantity = Quantity that has been invoiced on this Sales Invoice Line.
Qty. to Add = Quantity the Customer is complaining about.
Qty. Already Credited = Quantity that has already been handled or added to Complaint Lines for this Sales Invoice Line.
Qty. Left to Credit = Quantity – Qty. Already Credited

After clicking the **OK** button, all the Complaint Lines will be created based on the **Qty. to Add** – you do not need to select them – and the **Quantity** of the Complaint Lines will be filled with the **Qty. to Add**.
If you do not fill in the **Qty. to Add**, you need to select the Lines, after which they will be created as Complaint Lines, and you need to fill the **Quantity** on the Complaint Lines itself.

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**:



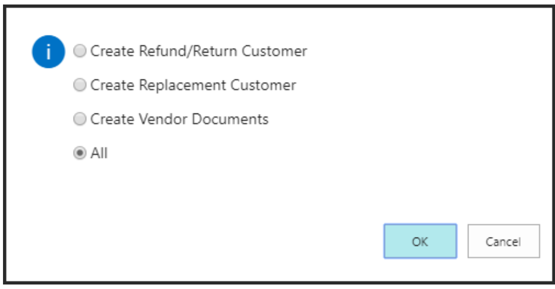
Approve

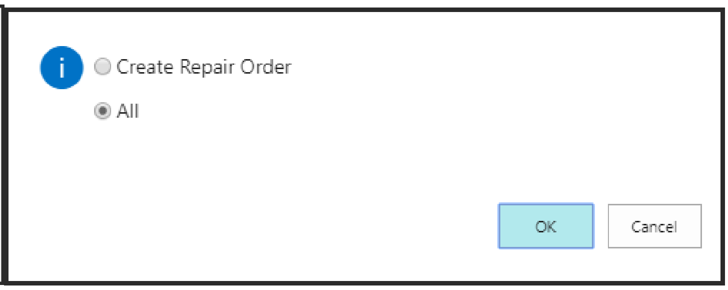
With this Boolean, the Complaint gets the Status *Approved*. This is mandatory if the Function **Create Documents** should be executed.

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.

You can create all documents at once or select the Type of documents you want to create.





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

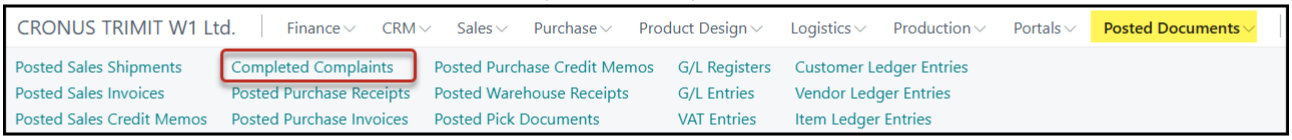
This Function test, if the Complaint can be completed; if all Lines have been processed and if all the attached Documents have been posted. If not, an error will appear.

Complete Complaint

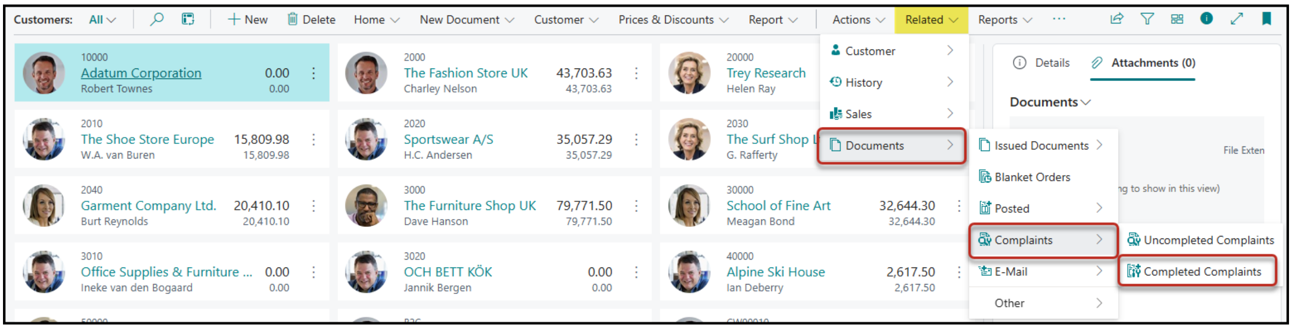
The Function **Complete Complaint** moves the Complaint Header and -Lines to **Completed Header** and -**Lines** Tables. This can only happen, if all Lines have been processed and all attached Documents have been posted or if you set the **Status** of the Complaint (or Complaint Lines) to *Rejected*.

The Layout of the **Completed Complaints** page will (more-or-less) be the same as for the normal Complaint, but you are not able to change it anymore.

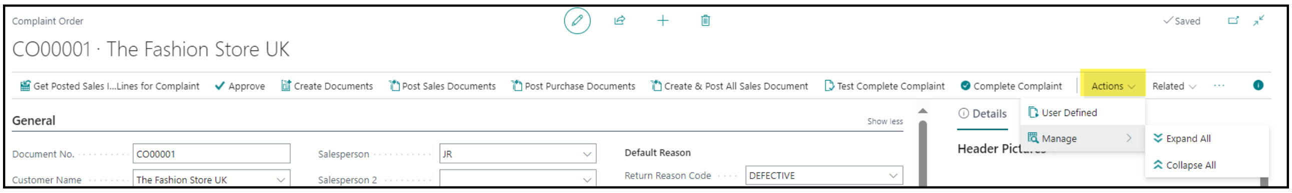
You are always able to see the details via **Search** *Completed Complaints*, or in the Role Center *TRIMIT Small Business* via ***Posted Documents, Completed Complaints***.



But also, under ***Posted Documents*** in the Role Centers *TRIMIT Customer Service* and *TRIMIT CRM*. And in the Customer List/Card via ***Related, Documents, Complaints, Completed Complaints***.



Actions on Complaint Header



User Defined

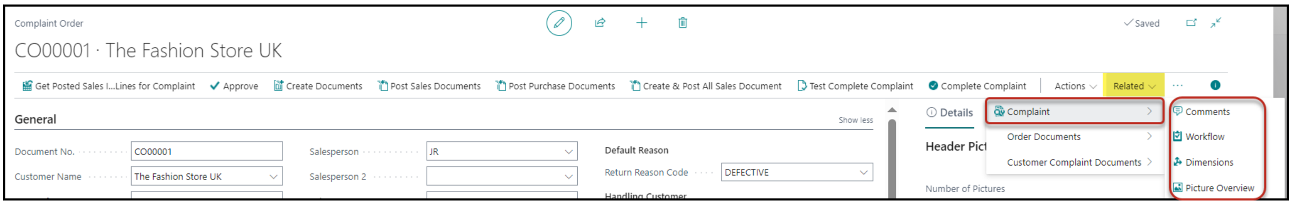
Via ***User Defined***, the **Page Actions** will be shown, where you can add all kinds of objects (like Pages, Codeunits or Reports), that a user should be able to run for this specific Complaint or Complaint Line. This way you are also able to start specific customized functionality regarding a Complaint.
More information regarding **Page Actions** can be found in the ***White Paper – TRIMIT Role Center*** The **Page Actions** you added will also be shown in the FactBox ***Page Actions.***

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

Complaint



Drilling down from ***Related, Complaint***, the user can attach all kinds of specific Complaint Information.

Comments

You can enter all kinds of **Comments** to this Complaint.

Workflow

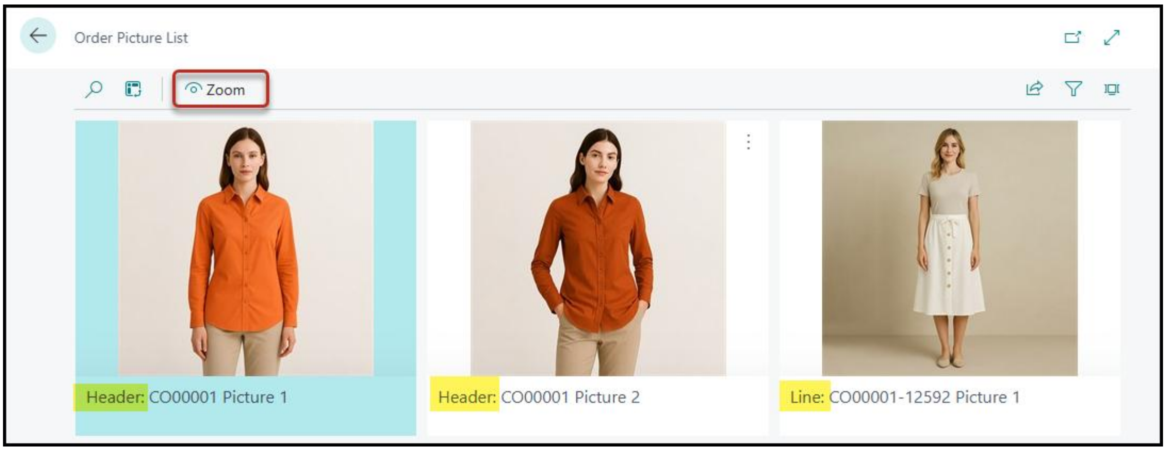
You can attach a TRIMIT Workflow with steps that need to be executed to help you manage the actions that need to be carried out regarding the Complaint.
For more information see ***White Paper – TRIMIT Workflow.***

Dimensions

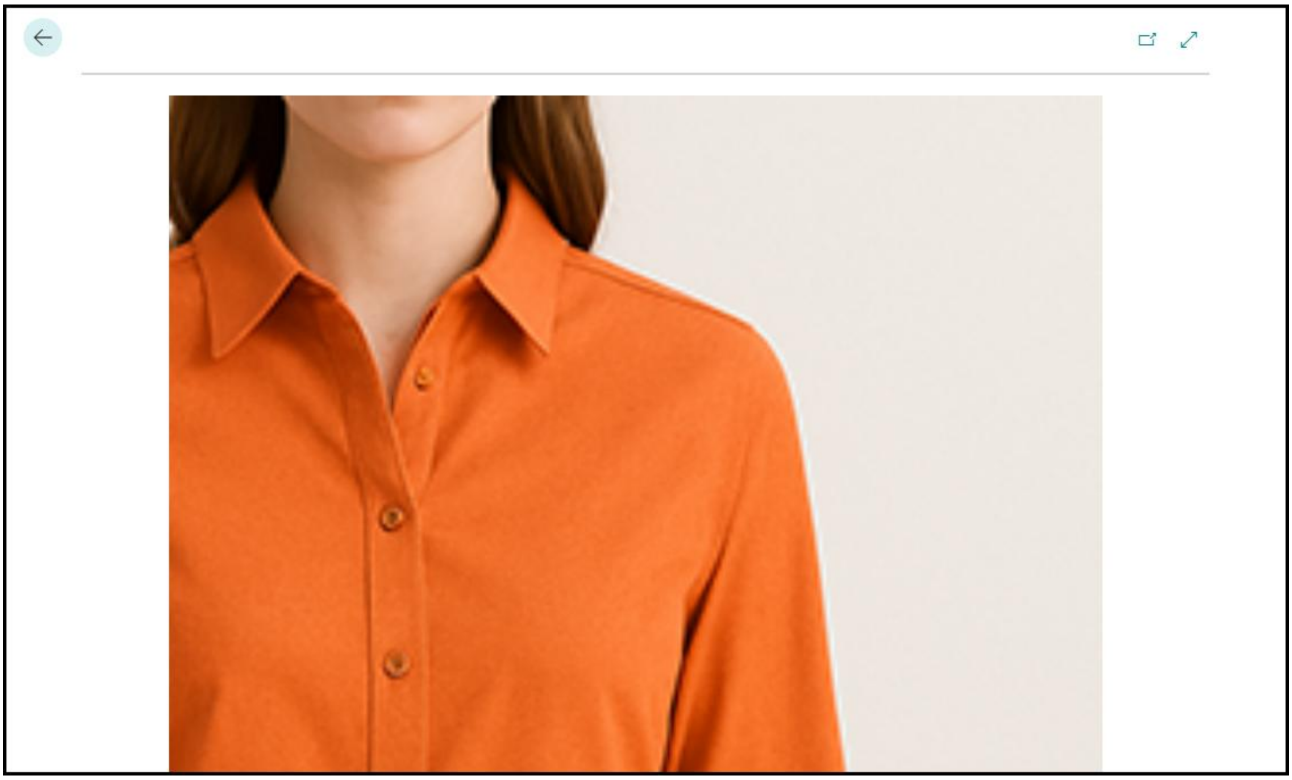
You can attach specific Financial Dimensions to the Complaint, which will also be copied to the Complaint Lines.

Picture Overview

You can attach **Pictures** to the Header (see FactBox Header Picture) and to the Lines (see FactBox Line Picture). The **Order Picture List** will show you all pictures related to Header or the Lines. I.e.:

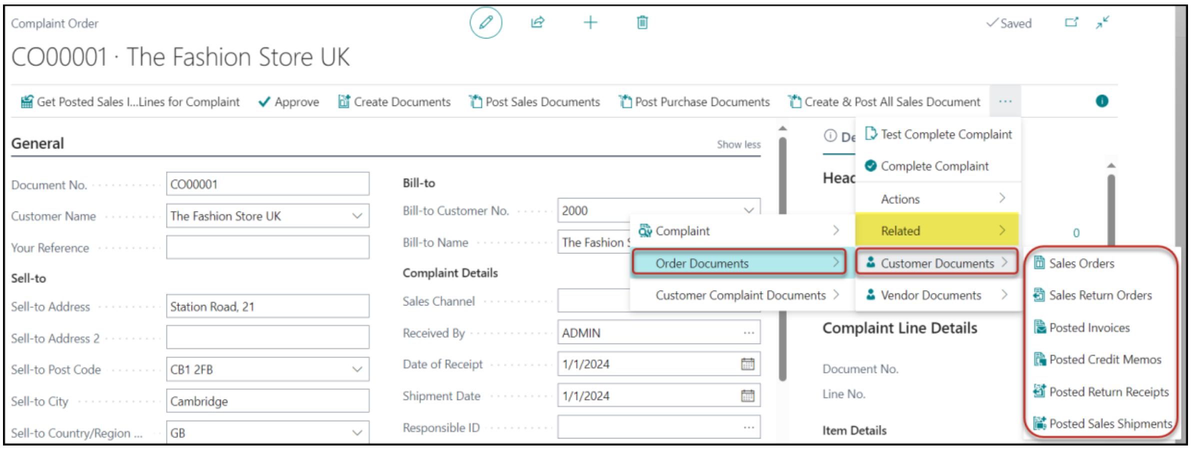


Now when selecting a picture, you can also click ***Zoom*** and see go over the picture with your mouse to see more details.

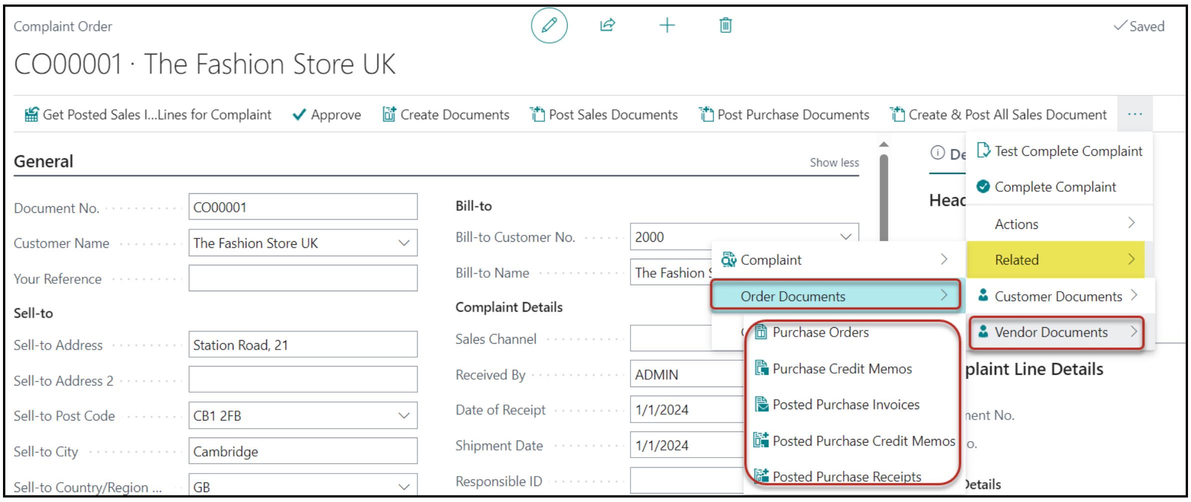


Order Documents, Customer Documents

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

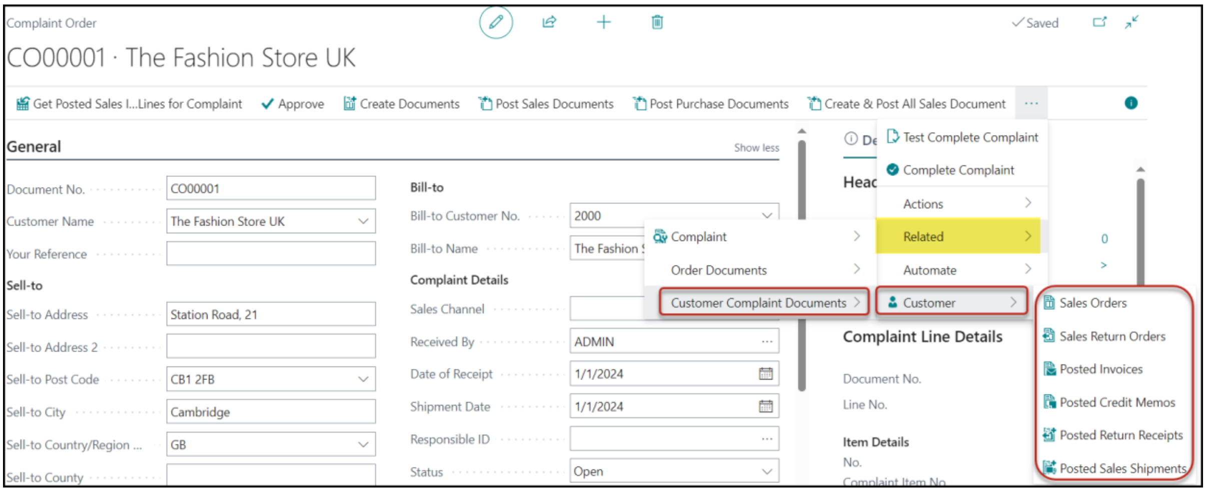


Order Documents, Vendor Documents

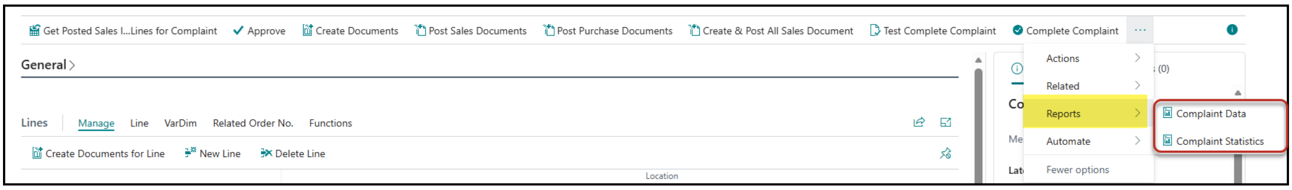


Customer Complaint Documents, Customer

Under ***Related*, *Customer Complaint Documents,*** 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.



Reports on Complaint Header



See [Complaint Reports](#).

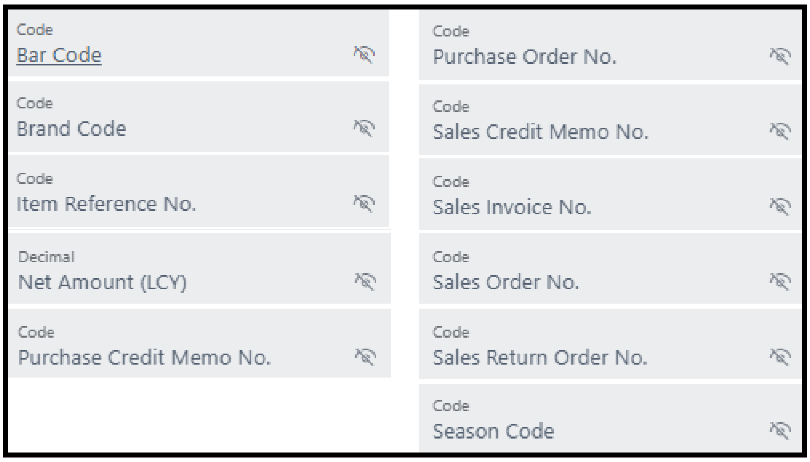
Complaint Lines

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

Expand Matrix	Type	No.	Description	Description 2	Item not Available	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	Line Discount %	Net Amount
☑	**Matrix**	**2030**	**Ella Trousers**		☐	**2030**	**2030**	**2030**	**2030**	**BLUE**	**B-CHOICE**	**1**	**PCS**	**41.00**	**0**	**41.00**
☐	Item	20303038	Ella Trousers	Yellow,38	☐	20303038	20303038	20303038	20303038	BLUE	B-CHOICE	1	PCS	41.00	0	41.00
☑	**Matrix**	**2100**	**Lily Blouse**		☐	**2100**	**2100**	**2100**	**2100**	**CW**	**B-CHOICE**	**0**	**PCS**	**0.00**	**0**	**0.00**
☐	Item	21009901	Lily Blouse	Black,XS	☐	21009901	21009901	21009901	21009901	CW	B-CHOICE	0	PCS	35.99	0	0.00

Expand Matrix	Type	No.	Description	Return Reason Code	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**	**Ella Trousers**	**DEFECTIVE**	☐	**Refund on Return + Replacement**		**2300**	☐		**104181**	**10000**	☐	☐	☐
☐	Item	20303038	Ella Trousers	DEFECTIVE	☐	Refund on Return + Replacement		2300	☐		104181	13214	☐	☐	☐
☑	**Matrix**	**2100**	**Lily Blouse**	**DEFECTIVE**	☐	**Refund on Return + Replacement**		**STD**	☐		**104182**	**10000**	☐	☐	☐
☐	Item	21009901	Lily Blouse	DEFECTIVE	☐	Refund on Return + Replacement		STD	☐		104182	19215	☐	☐	☐

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.
The red Fields have been added via ***Personalize***.
You are also able to add more Fields to the Line via ***Personalize***.



In the TRIMIT Demo Data, Brand Code = Global Dimension 1, Season Code = Global Dimension 2.

No.

The Item the Customer is complaining about.
If the Item is filled via *[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.** of the Web Return.

Description / Description 2

The **Description** and **Description 2** will be filled based on the **No.** or **Invoiced Item No.**
For Line **Type** is *Master* or *Item*, the fields are filled based on the parameter [Item to be Used as Description] in the Sales & Receivables Setup.

Item not Available

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

Invoiced Item No. (not default shown on the page)

In case the Complaint Line was created via *Get Posted Sales Invoice Lines for Complaint*, it will show the Item of the Posted Sales Invoice Line that was selected.

Return Item No. (not default shown on the 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 a sofa: the Customer is complaining about a bought sofa, but he sends back the wrong pillow that was 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 on the 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**, but you can change it.

> 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 Web Return.

Unit Price

If the Complaint Line was created 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 **Unit Price** will be determined based on the regular Sales Prices for the **Customer Name** of the Complaint.

Line Discount % (not default shown on the page)

If the Complaint Line was created via *Get Posted Sales Invoice Lines for Complaint*, it will be filled with the same **Line Discount %** from the Posted Sales Invoice Line.
Otherwise, you can fill it based on what the Customer tells you, but that is only possible if the **Line Discount Combination** in the Sales & Receivables Setup is *No.*
It is not possible to add **Line Discount Combinations** to a Complaint Line, but you can add them later to the created Sales Documents based on the Complaint.

Net Amount

This field will be calculated based on the **Quantity, Unit Price,** and **Line Discount %.**

Return Reason Code

By default, the **Return Reason Code** of the Complaint Header will be copied into the Line.
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

By default, the **Free of Charge** of the Complaint Header will be copied into the Line.
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

By default, the **Solution Customer** of the Complaint Header will be copied into the Line.
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

By default, the **Solution Vendor** of the Complaint Header will be copied into the Line.
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. Maybe 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 select existing Posted Sales Invoice Lines into the Complaint Lines, for which the **Concerning Invoice** will be filled.
This could be different Posted Sales Invoice Nos. for the Complaint Lines.
You are, however, also able to enter a Posted Sales Invoice No. 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.

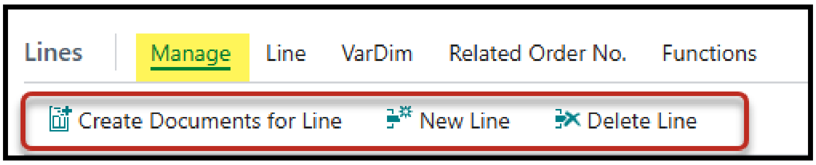
Concerning Invoice Line
With the function *Get Posted Sales Invoice Lines for Complaint*, you can select existing Posted Sales Invoice Lines into the Complaint Lines, for which the **Concerning Invoice Line** will be filled.
But you are also able to enter a Posted Sales Invoice Line manually.
A **Concerning Invoice Line** can have multiple Complaint Lines connected. This field contains the appropriate Posted Sales Invoice Line of the **Concerning Invoice**.

Refund/Return Documents Created
If a Refund (Sales Credit Memo) and/or Sales 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*.

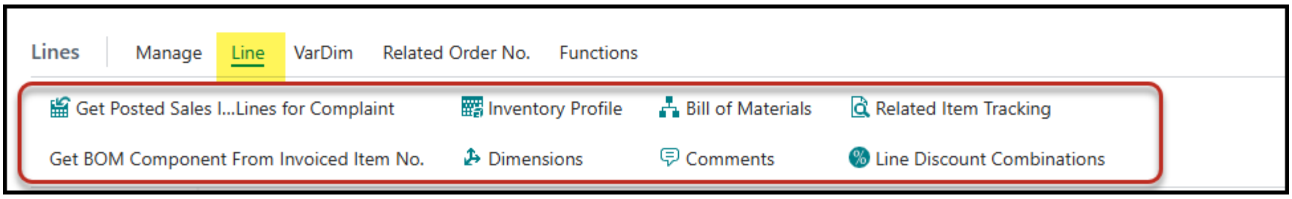
Actions on Lines / Manage



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



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.
See *Get Posted Sales Invoice Lines for Complaint* for more information.

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 (BOM) 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

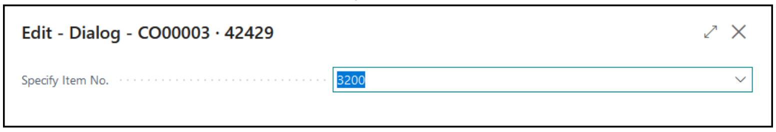
This Function shows the **Inventory Profile** of the selected **No.** from the Complaint Line. Note that there is a different view for a *Matrix* Line compared to a Complaint Line of Type *Item*.

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



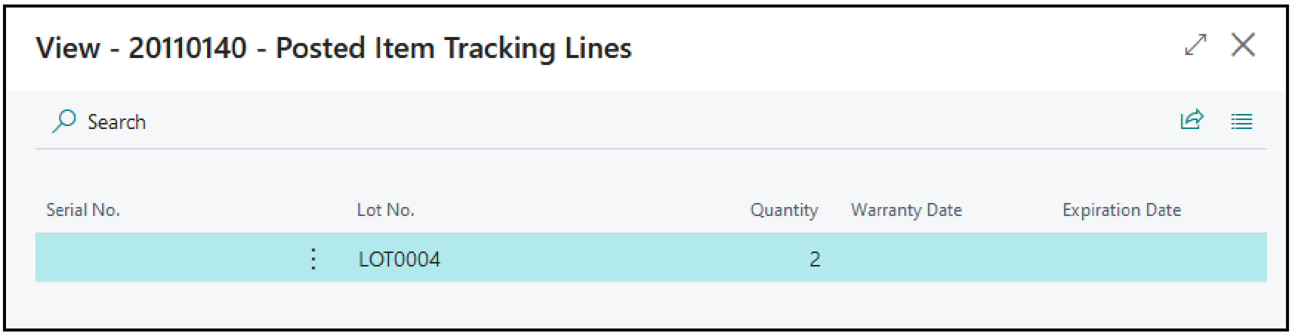
Comments

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

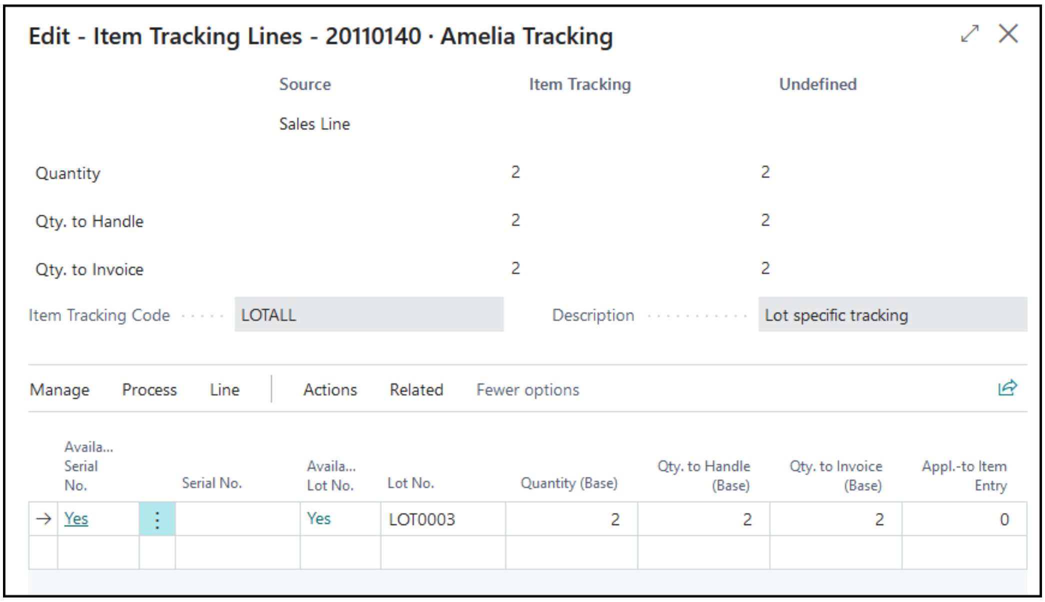
Related Item Tracking

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.:

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



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

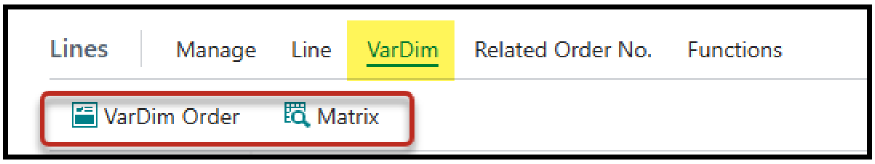


Line Discount Combinations

In case the Complaint Line was created via *Get Posted Sales Invoice Lines for Complaint*, and the original Posted Sales Invoice Line has **Line Discount Combinations**, this Function of the Complaint Line will show these **Line Discount Combinations.**

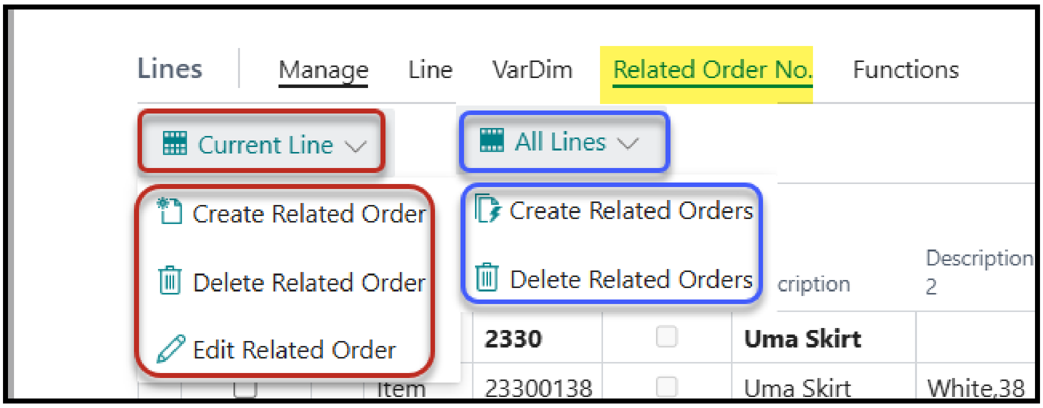
They cannot be changed but will also be copied to the Sales Documents that might be created based on this Complaint Line, and in those Sales Documents, you are able to change the **Line Discount Combinations** if necessary.

Functions on Lines /VarDim



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.



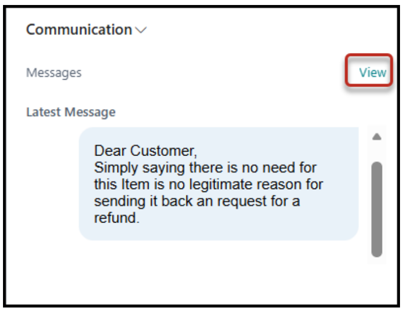
Below the **Related Order No.**, you can find functionality that enables the user to create and maintain the Related Orders. This works identical to the same functions on a Sales Order Line.

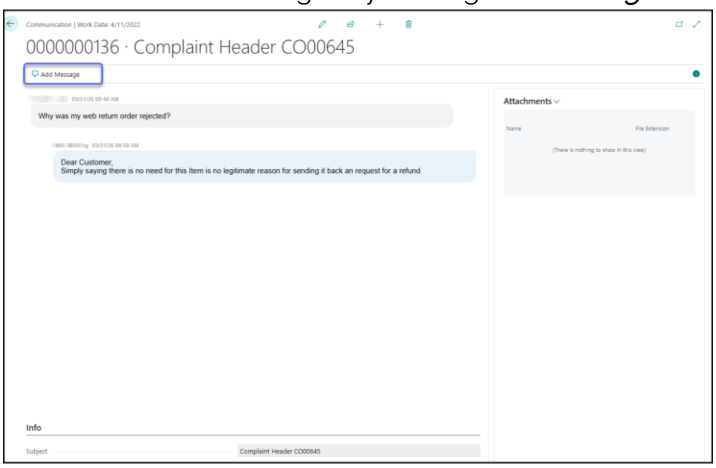
Functions on Lines/Functions

Via ***Functions, User Defined***, the **Page Actions** will be shown, where you can add all kinds of objects (like Pages, Codeunits or Reports), that a user should be able to run for this specific Complaint or Complaint Line. This way you are also able to start specific customized functionality regarding a Complaint.
More information regarding **Page Actions** can be found in the ***White Paper – TRIMIT Role Center Features***.
The **Page Actions** you added will also be shown in the FactBox ***Page Actions***.

FactBox Communication

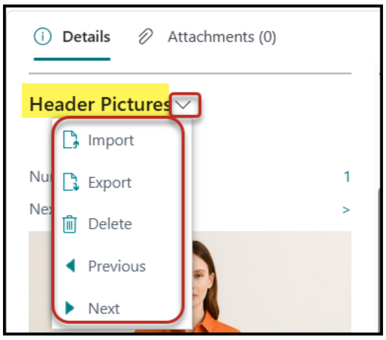
If the Complaint has been created via the **TRIMIT Web Return** from the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, it is possible that the Customer has questions or remarks regarding the Complaint. They will be added to the Complaint, and you are able to answer back to the Customer.
In the FactBox ***Communication*** you will see the latest Message which can be from the Customer or from you. By clicking ***View***, you can see all the Messages (from Customer and from Users of your company) regarding the Complaint, and you can create new Messages by clicking ***Add Message***. I.e.:





FactBox Header Pictures

In this FactBox *Header Pictures*, 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**.

Import

You can **Import** Pictures to this Complaint Header.

Export

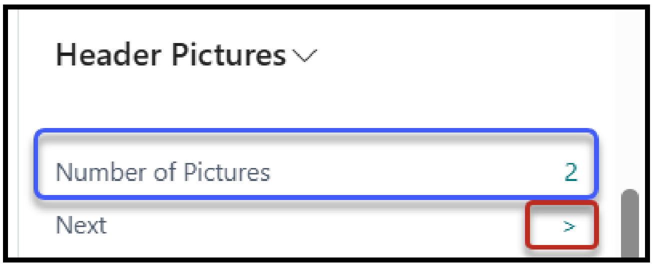
You can **Export** the Pictures that were already imported to this Complaint Header.

Delete

You can **Delete** the Pictures that were already imported to this Complaint Header.

Previous/Next

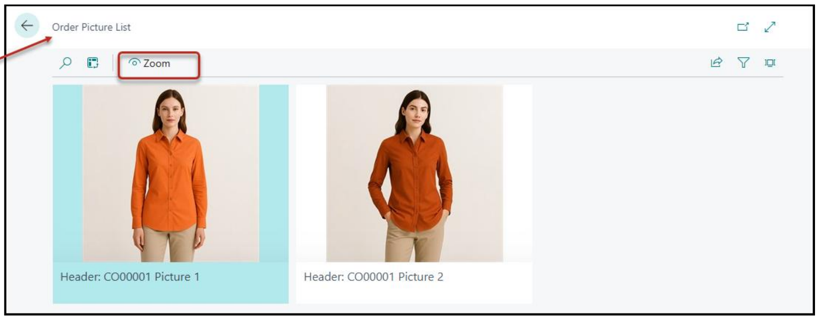
You can 'scroll' through the Pictures that were already imported to this Complaint Header.
In this FactBox, you can also see the **Number of Pictures** that were already imported to this Complaint Header. It is also possible to click the **>** to scroll through the imported Pictures.



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

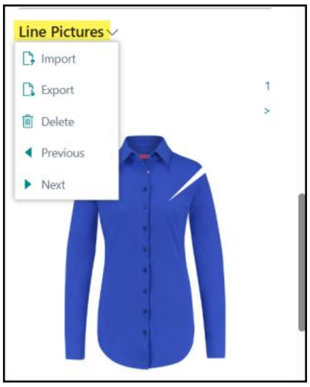
Picture Viewer

When clicking on the **Number of Pictures**, you get an overview of the Pictures that are already imported for this Complaint.



FactBox Line Pictures

In this FactBox, you can import Pictures that the complaining Customer has send so you can see the flaws, etc.
You have the same options as described in FactBox Header Pictures but now related to the individual Complaint Lines.



If the Complaint has been created via the **TRIMIT Web Return** from the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, and the Customer has uploaded a file that is a Picture, it will be uploaded in the Complaint as a **Line Picture.**

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 based on a specific Complaint Line.
This is only applicable for Complaint Lines with **Type** *Item* and *G/L Account.*

Complaint Line Details

Document No.	CO00001
Line No.	12592

Item Details

No.	23300138
Complaint Item No.	23300138
Return Item No.	23300138
Replacement Item No.	23300138

Open Documents

Sales Order	0100005
Sales Invoice	–
Sales Credit Memo	–
Sales Return Order	1010
Purchase Order	–
Purchase Credit Memo	–
Production Order	–

Posted Documents

Posted Sales Shipment	–
Posted Sales Invoice	–
Posted Return Receipt	–
Posted Sales Credit Memo	–
Posted Purchase Invoice	–
Posted Purchase Credit Memo	–
Finished Production Order	–

The **Posted Sales Shipment** and **Posted Return Receipt** are not in the FactBox by default, but you can add them via *Personalize*.

FactBox Complaint Line Configuration

This FactBox can show the **VarDim Order** (Configuration) of the Complaint Line of **Type** *Item and* show you what the base is for this **Line Configuration**.
In this example it is based on the **Invoiced Item No.**, so it will be based on a Complaint Line that was selected from an existing Posting Sales Invoice Line.

Line Configuration

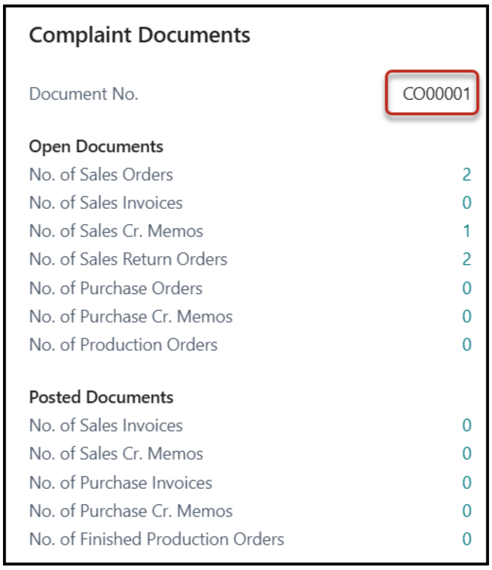
Shown for Invoiced Item No.

VarDim Type	Description	Value	Name
SOFA_FRAME	Sofa Frame Parts	52001	Persephone 1 Seater
SOFA_MAT	Sofa Box Exterior Material	55	Leather
SOFA_COL	Sofa Outer Frame Color	82	Eggplant
SOFA_PAT	Seat Fabric Pattern	00	One Color
SOFA_CUSH	Sofa Cushion Color	92	Light Grey

The **Description** is not in the FactBox by default, but you can add them via *Personalize*.

FactBox Complaint Documents

This FactBox is not shown by default, but you can add it via *Personalize.*
It will show the total numbers of the Sales-/Purchase Documents that have been created for a specific Complaint.

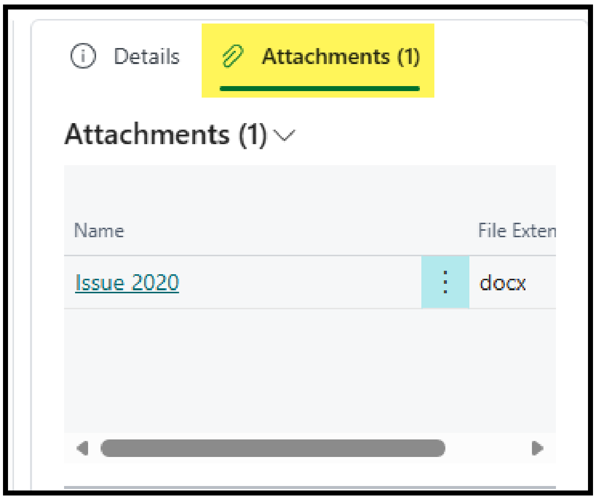


Other FactBoxes

They are not shown on the page but can be added via *Personalize*.
Sell-to Customer Sales History
Customer Statistics
Customer Details
Bill to Customer Sales History
Related Picture (Default Picture of the Master/Item)

Attachments

If the Complaint has been created via the **TRIMIT Web Return** from the **TRIMIT B2B Webshop** or **TRIMIT Sales Agent**, and the Customer has uploaded a file that is not a Picture, it will be saved as an **Attachment**.
I.e.:

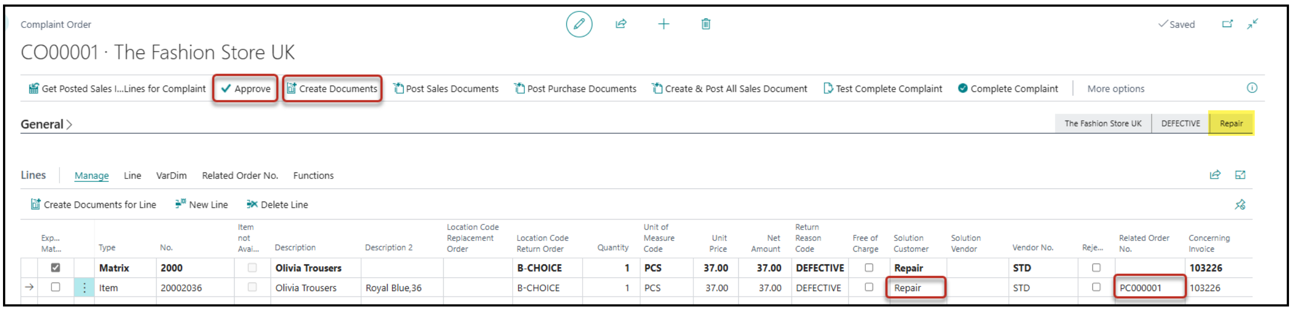


Repair Production Order

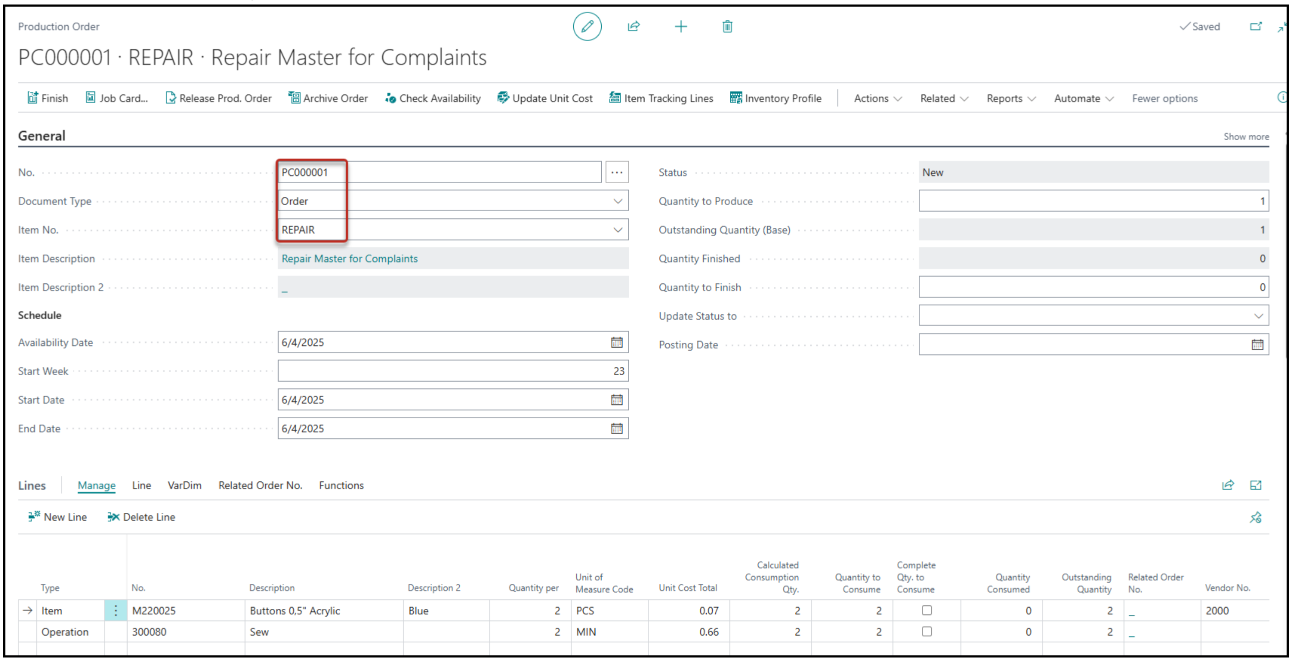
If you create a Complaint Line with **Customer Solution** = *Repair*, a related Production Order will be created for the **Item for Repair Production Order** of the Sales & Receivables Setup.

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 *Repair 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:



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



References

Show more

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	11508	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*.

Item Ledger Entries

Find entries... Entry Order Tracking Application Worksheet More options

Posting Date	Entry Type	Document Type	Document No.	Item No.	Description	Brand Code	Season Code	Locati... 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:*

Value Entries

Find entries... Entry More options

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*.

2120 Finished Goods

General Ledger Entries Edit List Home New Review Entries More options

Find entries... Reverse Transaction... Correct Dimensions Entry

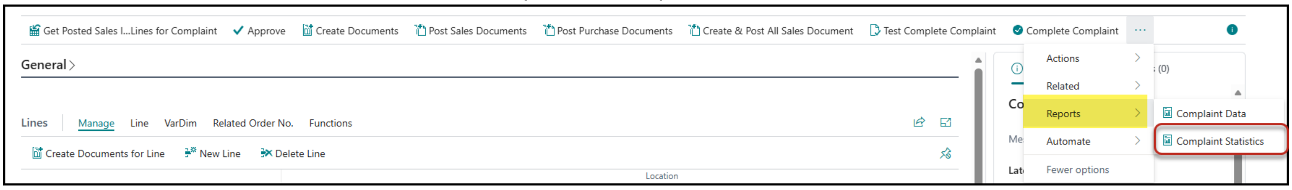
Posting Date	Document Type	Document No.	G/L Account No.	G/L Account Name	Description	Brand Code	Season Code	Gen. Posting Type	Gen. Bus. Posting Group	Gen. Prod. Posting Group	Amount (LCY)	Bal. Account Type	Bal. Account No.	VAT Date	Entry No.
6/4/2025		PC000001	2120	Finished Goods	Direct Cost REPAIR on 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 (z*ero).

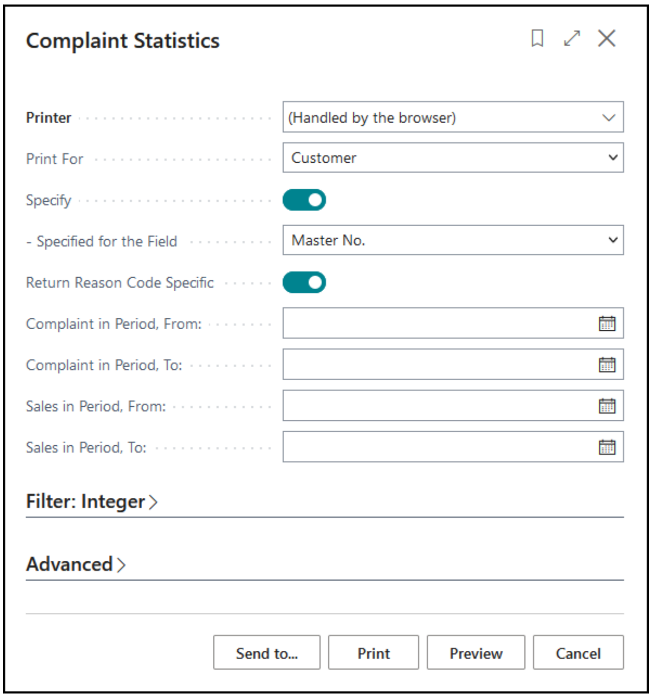
Complaint Reports

Complaint Statistics

The **Complaint Statistics** will show the Statistics for the Complaints:
How many Items were sold, and for how many did you receive Complaints and with which **Return Reason Code**. These Statistics will include Open and Completed Complaints.
You can find this report via **Search** *Complaint Statistics*.
But also, in the Complaint List/Card via ***Reports, Complaint Statistics***.



The **Request Page** looks as follows:



Description of the Option Fields:

Print For

You can choose between the following six options:

Customer	The report will be sorted by Customer
Vendor	The report will be sorted by Vendor for which Credit Memos have been created
Item No.	The report will be sorted by Item Number of the Complaint Line
Master No.	The report will be sorted by Master Number of the Complaint Line
Complaint Item	The report will be sorted by Complaint Item Number of the Complaint Line
Invoiced Item No.	The report will be sorted by 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 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
CRONUS TRIMIT W1 Ltd.

Date: 5-7-2022
Time: 09:17:48
ADMIN
Page: 1

Customer		Complaint Qty.	Qty. Sold	Complaint Pct.	Complaint 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

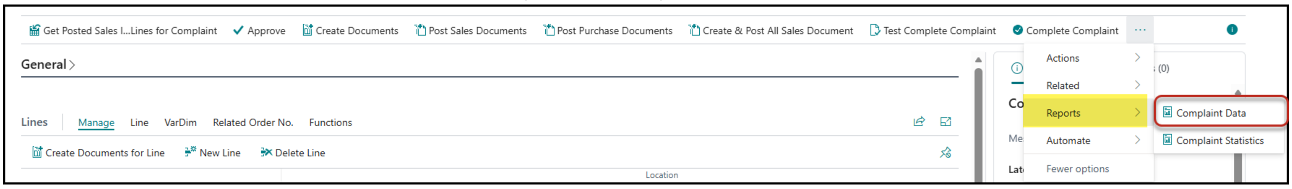
Unit Cost of the Item multiplied by the **Quantity Complaint**

Qty. per Reason

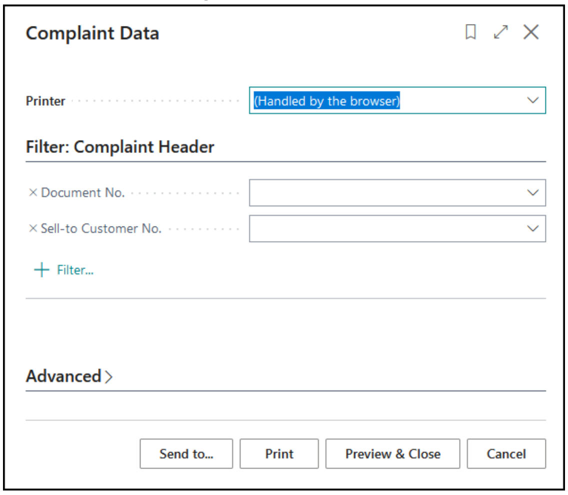
Per **Return Reason Code**, which will only be shown if the **Return Reason Code Specific** will be set to *Yes,* the quantity will be shown.

Complaint Data

This Report provides an overview of **Complaint** information.
You can find this report via **Search** *Complaint Data*.
But also, in the Complaint List/Card via ***Reports, Complaint Data***.

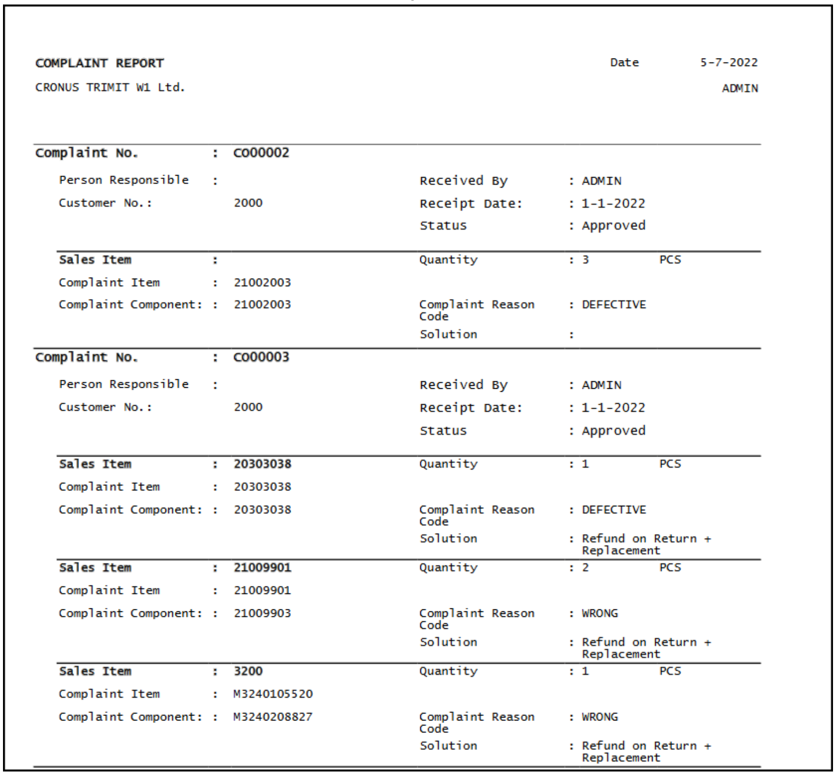


The **Request Page** looks as follows:



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