

Intranet Complaints System – New Credit Authorisation Procedure

The procedure for credit authorisation has changed. Credit must now be authorised at two levels, Commercial and Financial.

The Existing Complaints Authorisation Procedure

Concluding action

8D date	<input type="text" value="Automatically generated"/>	DD/MM/YYYY
Return product form date	<input type="text" value="Automatically generated"/>	DD/MM/YYYY
Disposal note date	<input type="text" value="Automatically generated"/>	DD/MM/YYYY
Date of Disposal note signed back	<input type="text"/>	DD/MM/YYYY
Is complaint category correct	<input checked="" type="radio"/> Yes <input type="radio"/> No <input type="text" value="C1 Missed due date forwarder responsibility"/>	
Credit note value	<input type="text"/>	EUR <input type="text"/>
Request credit authorisation	<input type="radio"/> Yes <input checked="" type="radio"/> No	
<input type="button" value="Submit"/>		
Credit authorised	<input checked="" type="radio"/> Yes <input type="radio"/> No	
Credit authoriser	<input type="text" value="Automatically generated"/>	
Reason for rejection/date/name	<input type="text"/>	
Transfer ownership	<input checked="" type="radio"/> Yes <input type="radio"/> No	
<input type="button" value="Submit"/>		

The New Complaints Authorisation Procedure

Concluding action

Conclude	
8D date	
Return product form date	
Disposal note date	
Date of Disposal note signed back	
Is complaint category correct	<input checked="" type="radio"/> Yes <input type="radio"/> No
C1 Missed due date forwarder responsibility	
Credit note value	100000 GBP
Date	20/08/2005 DD/MM/YYYY
Submit	

Credit Authorisation	
Credit Authorisation Advice - Advise Credit Authorisation	
COMMERCIAL Credit Authorisation - Credit Authorised	
Credit Authorised - COMMERCIAL LEVEL	<input checked="" type="radio"/> Yes <input type="radio"/> No
Credit Authoriser - COMMERCIAL LEVEL	Jan Berry
Reason - COMMERCIAL LEVEL	
Submit	
FINANCIAL Credit Authorisation - Credit Authorised	
Credit Authorisation Status: Credit Authorised	

1. Credit note value
2. Submit for credit authorisation
3. Hidden authorisation stage (can be expanded to view - see 4)
4. Expanded authorisation stage
5. Authorisation decision
6. Submit authorisation
7. Hidden authorisation stage (can be expanded to view - see 4)
8. Green = Credit Authorised, Red = Credit Denied, White = Process Incomplete

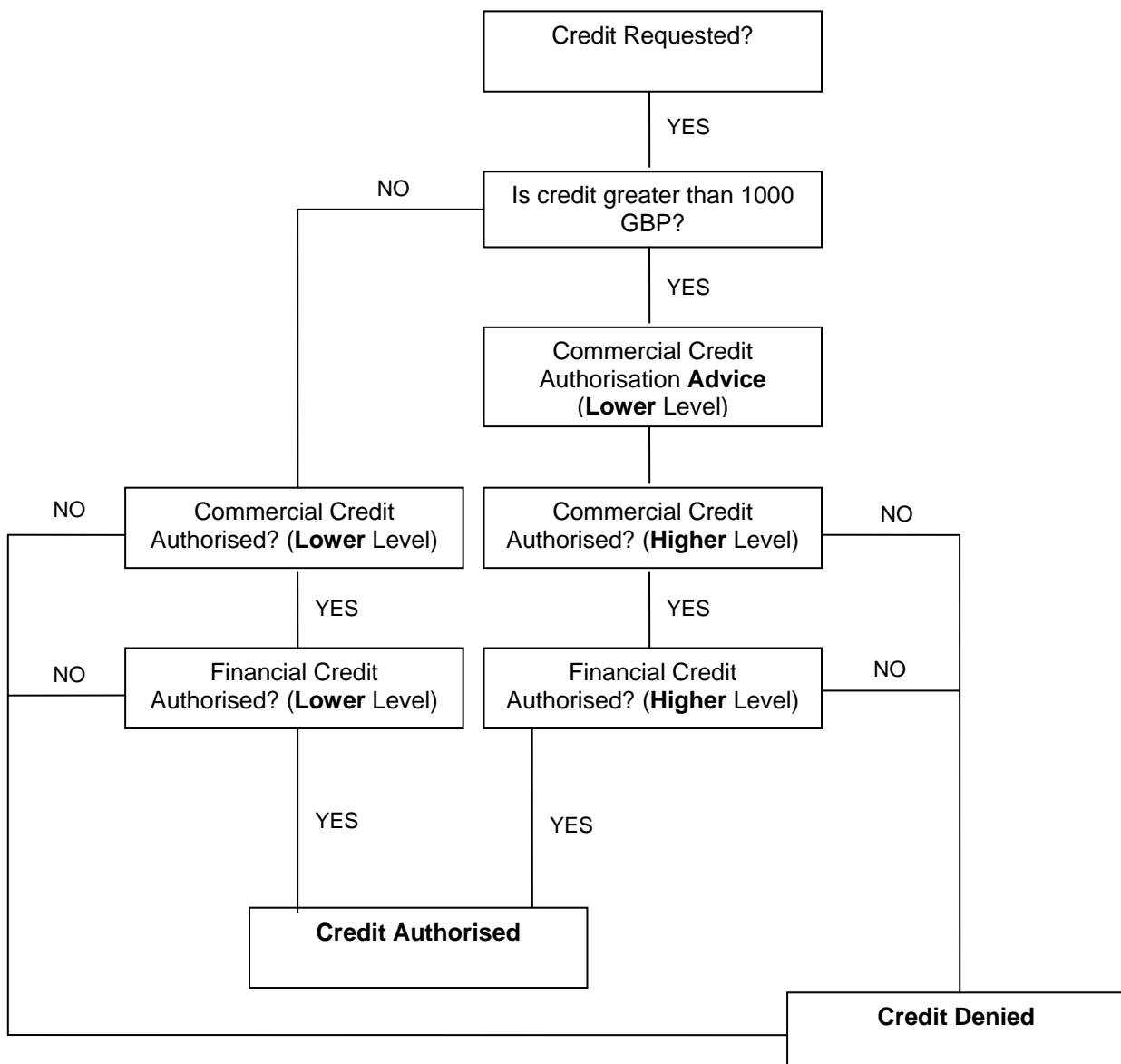
The system handles the process from the moment the credit note amount is submitted up to the stage where the complaint is handed back to the complaint owner.
The system will automatically provide a list of the users that the complaint can be delegated to at each stage of the process. This allows the owner and authoriser to perform their role and then pass the complaint on without having to work out who it needs to be sent to or what needs to be done next.

Complaint Owner Roles:

1. Enter the credit note value and the currency
 2. Click SUBMIT
- *The complaint is now passed around the credit authorisers.*
3. The complaint is passed back to you.

Credit Authoriser Roles:

1. When receiving an email requesting you authorise credit, open the complaint using the link provided.
2. Make your decision and go to the concluding action page.
3. Enter your decision and click submit
4. Choose a user from the list provided and delegate the complaint



How to delegate the complaint

Request Credit Authorisation - COMMERCIAL LEVEL

Name	<div></div>
Copy notification	<input type="radio"/> Yes <input checked="" type="radio"/> No
Copy to	<div>Aalberto Foresto Abdul-Halim Ajdari Adam Smith Adolf Benedikt</div>
Optional message	<div></div>
<div>Submit</div>	

This will change depending on the current stage

1. Select a name from the drop down box (The list will automatically have the correct names from the current stage and business unit)
2. Select a user to send a copy of the email to (**Optional**)
3. Add a message (**Optional**)
4. Click submit