

# CORE<sup>2</sup> DYNAMICS

## **Key User Documentation**

Complaint Management – Business Central Core V5.00

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## 1 Complaint Management (CORE modification)

General Remark:

The complaint function is completely taken from NAV2016 to BC.

### 1.1 Complaint Management Overall Process

Phoenix Mecano starts the complaint process with the complaint management tool. The complaint process starts before a return order is created. The complaint contains the customer, vendor or the internal resource that is complaining. The reason of the complaint (item, delay of delivery, ...) is inserted and notes about what needs to be done to solve the problem, are added.

From the complaint form it is possible to create the following documents:

- Sales Complaint (Source Type = Customer)
  - Sales Order
  - Sales Return Order
  - Sales Credit Note
- Purchase Complaint (Source Type = Vendor)
  - Purchase Order
  - Purchase Return Order
  - Purchase Credit Note

From the sales complaint form, it is only possible to generate the sales documents. From the purchase complaint form, only purchase documents can be generated.

From a sales complaint a purchase complaint can be created. The two complaints are linked to each other so that all documents (purchase- and sales documents) can be viewed under related documents.

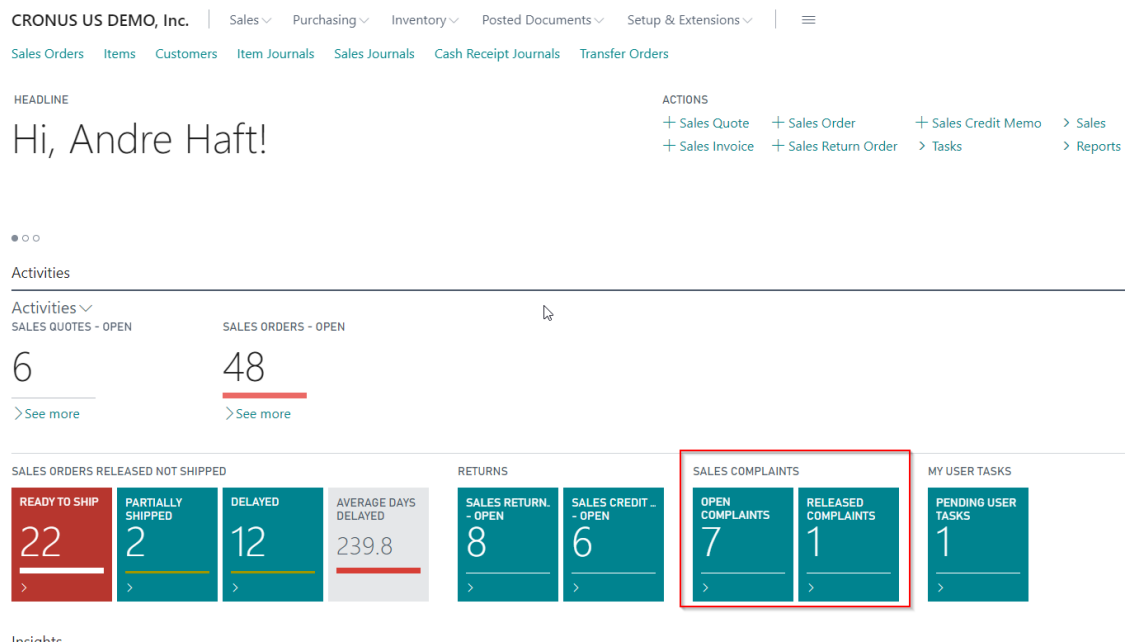
In case of a sales return, after the item is receipted, or at least posted, a decision is made whether the item is scrapped, repaired or sent back to the supplier. In case of repairing, the item will be re-shipped with a sales order. In case of scrapping an inventory adjustment has to be done (with the item journal) and the customer gets the credit note.

## 1.2 Role Center

The new module will be integrated into the Sales Order Processor RC and into the Purchase Agent RC.

The module will have four activity boxes. Two boxes for open and released complaints, two for open and released non-confirmative complaints. The finished complaints and the finished non-confirmative complaints are stored in the posted documents.

For user convenience two activity boxes were inserted.



CRONUS US DEMO, Inc. | Posted Documents ▾ | ≡

[Purchase Orders](#) [Purchase Quotes](#) [Blanket Purchase Orders](#) [Purchase Invoices](#) [Purchase Return Orders](#) [Pur](#)

15  
>

11  
>

There is nothing to show in thi

POST ARRIVAL FOLLOW-UP

OUTSTANDING ...  
ORDERS  
8  
>

PURCHASE RE...  
- ALL  
3  
>

PURCHASE ORDERS - AUTHORIZE FOR PAYMENT

RECEIVED, NOT  
INVOICED  
12  
>

PARTIALLY  
INVOICED  
0  
>

Inventory Performance ▾  
DEFAULT | Day (Updated 12:09:54 PM)

There is nothing to show in thi

PURCHASE COMPLAINTS

OPEN  
COMPLAINTS  
3  
>

RELEASED  
COMPLAINTS  
0  
>

MY USER TASKS

PENDING USER  
TASKS  
1  
>

### Test Case:

Open the Client BC with the right profile. Check if the new activity boxes exist, if they show the correct number of documents and open them in the correct list.

## 1.3 Setup

### Complaint Setup

✕ Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

---

**General**

---

Resp. Table ID .....  ▾ Resp. Table Name ..... Salesperson/Purchaser

**Numbering**

---

Complaint Nos. .... COMPLAINT ▾ Finished Complaint N... COMPLAINT ▾

Fields that must be defined in the setup are "Resp. Table ID" and "Resp. Table Name". This fields define whether the responsible fields in the module are related with the "Salesperson / Purchaser" or employee table.

Complaint Management Setup (Tab General):

Field Name	Type	Further Information
Resp. Table ID	Options: <ul style="list-style-type: none"><li>• "13",</li><li>• "5200"</li></ul>	
Resp. Table Name	Text 80	Not editable; Shows the name of the chosen table

The following fields are related and connected to this setup:

- "Responsible Code" – in table Complaint Action Code
- "Default Responsible Code" – in table Complaint Corrective Action

The numbering FastTab contains the no. series for the complaints and finished complaints. If the same no. series are inserted, as above, then the posted complaint has the same no. as the complaint. This should also be the case in the new module.

## Complaint Management Setup (Tab Numbering)

Field Name	Type	Further Information
Complaint Nos.	Code 20	Table relation to "No. Series"
Finished Complaint Nos.	Code 20	Table relation to "No. Series"

For the setup a page will be created with the fields discussed above and the "FastTabs" General and Numbering.

The Complaint Setup can be found under Administration.

When the number series for the complaints and finished complaints is the same, then upon posting a complaint, the finished complaint will have the same number as before posted.

## Complaint Setup

× Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

## General

Resp. Table ID ..... 13 ▾

Resp. Table Name ..... Salesperson/Purchaser

## Numbering

Complaint Nos. ..... COMPLAINT ▾

Finished Complaint N... COMPLAINT ▾

COMPLAINT



✓ SAVED



Complaint · RMA0012

× Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder



Post...



Print...



Confirmation of Receipt



Release



Reopen

Navigate

Fewer options

## General

No. .... RMA0012

Creation Time ..... 4:49:21 PM

Receipt Method ..... Mail ▾

ID Recorded ..... ANDRE.HAFT




Received by ..... ▾

Salesperson Code ..... ▾

Source Type ..... Vendor ▾


External Reference ..... ▾

FINISHED COMPLAINT



## Finished Complaint · RMA0012

✕ Reminder: your work date is 1/29/2021   Use today | Change to... | Turn off reminder

 Print... | More options

### General

No. ....	RMA0012	Creation Date ....	8/18/2020
Receipt Method ...	Mail	Creation Time ....	4:49:21 PM
Received by .....		ID Recorded .....	ANDRE.HAFT
Source Type .....	Vendor	Salesperson Code ..	

Test case:

Open the setup page belonging to the table. Check, if the above described fields exist in the defined tabs. Select a table ID in the field "Resp. Table ID" in the tab General and check, if the right table name is shown in "Resp. Table Name". Afterwards go to the numbering tab and select the needed No. Series for the fields.

## 1.4 Complaint Header and Line

The heart of the module is the complaint form. It is a header-line structure, where the header consists of the general information and the lines are for writing text that describes the complaint and includes internal notes and comments for the solution. There are several option types in the line to define the type of text. The type "conclusion" closes the discussion and advises how to proceed.

A new form "Complaint" will be created with three "FastTabs" (General, Source and Responsible). The following table describes the fields of the three tabs.



## Complaint Header (Tab General)

Field Name	Type	Further Information
Document Type	Options: <ul style="list-style-type: none"> <li>"complaint"</li> <li>"finished complaint"</li> </ul>	Not visible
No.	Code 20	No. is chosen from No. Series
Receipt Method	Options: email, fax, mail, phone	
Received by	Code 20	Table relation depends on setup (see above)
Source Type	Options: customer, vendor, internal, contact	
Source No.	Code 20	Table relation to the in "Source Type" defined tables; With the option "internal" no list is provided, the fields "name", "address", ... can be filled manually
Name	Text 50	Filled via "Source No."
Address	Text 50	Filled via "Source No."
Post Code	Code 20	Filled via "Source No."
City	Text 30	Filled via "Source No."
Contact Name	Text 50	Filled via "Source No."
Description	Text 80	Short description of problem
Demand	Text 250	Contains the desired solution
Document Date	Date	Automatically filled with the working date when entering a new complaint and can be changed
Posting Date	Date	Is automatically filled with the working date; the date should be changed to the appropriate date before posting the complaint
Date	Date	Automatically filled with the working date when entering a new complaint
Time	Time	Automatically filled with the time when entering a new complaint
ID Recorded	Code 20	Automatically filled with the User ID of the user when entering a new complaint
Salesperson Code	Code 10	Table relation: Salesperson / Purchaser
External Reference	Text 30	

Complaint Category	Code 20	Table relation: Complaint Category (see below)
Complaint Type	Code 20	Table relation: Complaint Type (see below)
Target Date	Date	Calculated via Complaint Category and corrective action; can be changed
Priority	Integer	
Corrective Action	Code 20	Table relation: Corrective Action (see below)
Status	Options: Open, Released	
Complaint Status	Options: New, Inspection, Accept, Rejected	
Cost	Decimal	
No. of Related Complaint	Integer	Table relation: Complaint Related Documents

## Complaint Category

Field Name	Type	Further Information
Code	Code 20	
Description	Text 250	
Target Date Calc.	DateFormula	

## Complaint Type

Field Name	Type	Further Information
Code	Code 10	
Description	Text 50	
Priority	Integer	

## Corrective Action

Field Name	Type	Further Information
Code	Code 20	
Description	Text 50	
Target Date Calc.	Date Formula	
Default Responsible Code	Code 20	Table relation depends on setup (see above)

## Complaint Header (Tab Source)

Field Name	Type	Further Information
Related to Doc. Type	Options: • “	

	<ul style="list-style-type: none"> <li>• Quote,</li> <li>• Order,</li> <li>• Blanket Order,</li> <li>• Return Order,</li> <li>• Invoice,</li> <li>• Credit Memo,</li> <li>• Shipment / Receipt,</li> <li>• Reminder</li> <li>• Firm Planned Prod. Order,</li> <li>• Released Prod. Order,</li> <li>• Finished Prod. Order</li> </ul>	
Related to Doc. No.	Code 20	No. of the document the complaint relates to; Table relation depends on fields "Source Type" and "Related to Doc. Type"
Item No.	Code 20	Item that is affected, if "Related to Doc. No." is specified then the lines of type item of the document show otherwise the item list
Item Description	Text 50	Calculated field on item description
Item Variant Code	Code 10	Table relation to "Item Variant"
Item Unit of Measure code	Code 10	Table relation to "Item Unit of Measure"
Complaint Quantity	Decimal	
Lot. No.	Code 20	
Serial No.	Code 20	
Production BOM No.	Code 20	Table relation to "Production BOM Header"
Production BOM Version No.	Code 10	Table relation to "Production BOM Version"
Component Line No.	Integer	Table relation to "Production BOM Line No."
Component Description	Text 50	Calculated field on component description

## Complaint Header (Tab Responsible)

Field Name	Type	Further Information
Responsible	Code 20	Table relation depends on setup (see above)
Responsible Name	Text 50	Name or last name respectively (depending on table relation)
Responsible First Name	Text 50	First name or empty (depending on table relation)

## Complaint Line

Field Name	Type	Further Information
Complaint Doc. Type	Options: <ul style="list-style-type: none"> <li>• "complaint",</li> <li>• "finished complaint",</li> <li>•</li> </ul>	Not visible
Complaint No.	Code 20	Not visible
Line No.	Integer	Generated automatically, not visible, not editable
Type	Option: Note, Comment, Reply Conclusion	
Description	Text 250	
User ID	Code 20	Automatically filled with the User ID of the user when complaint line is created, not editable
Responsible Code	Code 20	Filled from "Complaint Action", can be changed. Table relation depends on setup (see above)
Entering Date	Date	Automatically filled current date when complaint line is created
Entering Time	Time	Automatically filled current time when complaint line is created
Next Action	Code 20	Table relation to "Complaint Action"
Action Target Date	Date	Calculated via "Complaint Action", can be changed

## Complaint Action

Field Name	Type	Further Information
Code	Code 20	
Description	Text 250	
Target Date Calc.	DateFormula	
Default Responsible Code	Code 20	Table relation depends on setup (see above)

There are different functions and menus in the complaint form to open related entities or start functionalities.

## Function

- Menu item "Create related Complaint"
- Menu item "Open related Complaint"
- Menu item "Return Order"
- Menu item "Order"
- Menu item "Credit Memo"

COMPLAINT

Complaint · RMA0011

× Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Post... Print... Confirmation of Receipt Release Reopen **Navigate** Fewer options

Documents Release Posting Print **Functions**

No. RMA0011

Receipt Method E-Mail

Received by

Source Type Customer

Source No. 01905893

Create Related Complaint

Open Related Complaint

Return Order

Order

Credit Memo

If the field "Source Type" of a complaint is "Customer" then this defines the Complaint as a Sales Complaint. If the field Source Type of a complaint is "Vendor" then this defines the complaint as a Purchase Complaint.

If the "Source Type" of complaint is "Customer" the related complaint of type "Vendor" is created and vice versa.

If the "Source Type" of the complaint is "Customer" only sales documents can be created (i.e. sales return order, sales order and sales credit memo).

If the "Source Type" is "Vendor" only purchase documents can be created.

If the "Source Type" is "Internal" or "Contact" nothing happens, a message tells the user that documents can only be created with "Source Type" = "Vendor" or "Customer".

Menu items "Released" and "Reopen":

To change the field "Status". Difference to standard: the status "Released" has no effect on the editability of the complaint.

Posting

If the complaint is posted, it becomes a finished complaint. Finished complaints can not be edited anymore.

Print

Possibility to print the complaint. The report design is out of scope for the CORE – has to be done locally. The "Report Selection PM" page will be extended, so that a report can be setup for complaints.

#### **1.4.1 Field Description modified (PM BASE 12.25.0.1 + 11.24.0.7)**

Field Description at Header and Line Level are now up to 100 characters. This modification was delivered with PM Base 12.25.0.1 and PM Base 11.24.0.7

### **1.5 Complaint information on Customer, Vendor, Item**

A complaint can be related to customer or vendor. In some cases, it is necessary to see how many open complaints are related for a single customer or vendor. Furthermore, it is necessary to see how many complaints are related to a single item no. Open complaints refer to all complaints, no matter which status the complaint has

Following modifications have been made:

New field "No of Open Related Complaints" only inside the Customer Card. For counting and displaying please refer to the open created Complaints for this customer not to the finished one. Place this new field between "Credit Memo" and "Pstd. Shipments".

### Customer Card:

CUSTOMER CARD

C00010 · ANHA GmbH

✕ Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process New Document Request Approval Navigate Customer Actions Navigate Report Fewer options

#### General

No. ....	C00010	Costs (\$) .....	760.30
Name .....	ANHA GmbH	No of Open Related Com... ..	4
Balance (\$) .....	-126,738.55	No. of days since last Inv... ..	0
Balance Due (\$) .....	-126,738.55	ABC-Status .....	C
Credit Limit (\$) .....	1,000.00	RFO Status .....	
Blocked .....		DUNS-No. ....	
Block Reason .....		Priority .....	0
Total Sales .....	3,416.06	Territory Code .....	

New field "No of Open Related Complaint" only inside Vendor Card. For counting & displaying please refer to the open created Complaints for this vendor not to the finished ones. Place this new field between "Credit Memos" and "Pstd. Return Shipments".

### Vendor Card:

## VENDOR CARD



✓ SAVED



01905382 · NewCaSup

Process Report Request Approval New Document Navigate Vendor Actions Navigate Report Fewer options ⓘ

## General

Show less

No. ....	01905382	...	Balance Due (\$) .....	0.00
Name .....	NewCaSup		Document Sending Profile ..	...
Blocked .....	...		Search Name .....	NEWCASUP
Privacy Blocked .....	<input checked="" type="checkbox"/>		IC Partner Code .....	...
Last Date Modified .....	5/3/2020		Company Type .....	...
ABC-Status .....			Purchaser Code .....	RL
DUNS-No. ....	AERGQERG		Responsibility Center .....	...
No of Open Related Com... ..	1		Disable Search by Name ...	<input checked="" type="checkbox"/>
Balance (\$) .....	0.00			

New field "No of Open Related Complaint" inside Item Card. The field can be found in Fast Tab "Inventory" below field "Qty. on Asm. Component". For counting please refer to the field "Item No" on Complaint.

## Item Card:

## ITEM CARD



✓ SAVED



70000 · Side Panel

✕ Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Process Item History Special Sales...es &amp; Discounts Request Approval Actions Navigate Report Fewer options ⓘ

## Item &gt;

PCS

## Inventory

Show less

Shelf No. ....	A1	Qty. on Blanket Sales Ord... ..	5
Created From Catalog Item ..	<input checked="" type="checkbox"/>	Qty. on Service Order .....	0
Status .....	C-RELEASED	Qty. on Job Order .....	0
Statistics Group .....	0	Qty. on Assembly Order ...	0
Search Description .....	SIDE PANEL	Qty. on Asm. Component ...	0
Quantity on Hand .....	1,441	No of Open Related Com... ..	3
Qty. on Purch. Order .....	2	Stockout Warning .....	Default (Yes)
Qty. on Blanket Purch. Or... ..	0	Prevent Negative Inventory ..	Default (No)
Qty. on Prod. Order .....	0	Net Weight .....	2.3



## 1.6 Confirmation of Receipt

It was decided to build a new Core report

- REP60012 - Complaint Conf. of receipt

New action "Confirmation of Receipt" inside Sales Orders List, Sales Order Card, Sales Quote List, Sales Quote Card, Sales Complaint List and Complaint Card

Complaint · RMA0011

Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Post... Print... Confirmation of Receipt Release Reopen | Navigate Fewer options

### General

No.	RMA0011	Creation Time	4:45:56 PM
Receipt Method	E-Mail	ID Recorded	ANDRE.HAFT
Received by		Salesperson Code	
Source Type	Customer	External Reference	
Source No.	01905693	Complaint Category	
Name	Candoxy Canada Inc.	Complaint Type	
Address	18 Cumberland Street	Target Date	8/18/2020
Post Code	P7B 5E2	Priority	0
City	Thunder Bay	Status	Released
Contact Name	Mr. Rob Young	Complaint Status	New
Description		Corrective Action	
Demand		Cost	0.00
Document Date	8/18/2020	No. of Related Documents	2
Posting Date	8/18/2020	Related Complaint No.	
Creation Date	8/18/2020		

Lines | Manage

Type	Description	User ID	Entering Date	Entering Time	Next Action	Action Target Date	Responsible Code
→ Note		ANDRE.HAFT	1/29/2021	12:28:35 PM			

If you click this button a report shall be opened "Confirmation of receipt".

### Important Note:

The action is programmed inside the above-mentioned forms – NAV standard won't display the action inside the RTC unless a report is programmed.

For the layout of the Complaint Confirmation of Receipt a new report was programmed

### Note:

The layouts of the reports must be changed locally if required.

## 1.7 Sales and Purchase Complaints

With "Source Type" = Customer only sales documents can be created with the functions described above.

In order to generate a purchase document, it is necessary to generate a purchase complaint first. Therefore, it will be possible to create a purchase complaint ("Source Type" = Vendor) from a sales complaint. Both complaints are linked to each other and can be opened from each type of complaint.

- New function "Create Related Complaint".
- New button "Open related complaint", to open the purchase or sales complaint respectively.

The following default values from the sales complaint are set for the copied purchase complaint:

- Source Type = Vendor
- Demand
- Description
- Item No.
- Item Description
- Item Variant code
- Item Unit of Measure Code
- Complaint Quantity
- Complaint Category
- Complaint Type

There will be a new field "Related Complaint No." where the "Purchase Complaint No." is stored in the sales complaint and the "Sales Complaint No." is stored in the purchase complaint respectively. This ensures that the complaints have a one to one relationship.

It is possible to create a Purchase Complaint from a Sales Complaint by using the function "Create Related Complaint". With the function "Open Related Complaint" the related complaint can be opened, i.e. from the Sales Complaint the Purchase Complaint opens and vice versa.

COMPLAINT

Complaint · RMA0013

× Reminder: your work date is 1/29/2021 Use today | Change to... | Turn off reminder

Post... Print... Confirmation of Receipt Release Reopen **Navigate** Fewer options

Documents Release Posting Print **Functions**

No. RMA0013 8:46:01 AM

Receipt Method E-Mail ANDRE.HAFT

Received by AHA

Source Type Customer

Source No. C00010

Create Related Complaint

Open Related Complaint

Return Order

Order

Credit Memo

#### Test Case:

Activate the new function "Create related Purchase Complaint", via the action button in the page. Afterwards open the new purchase complaint with the new action button "Open related complaint". The purchase complaint should open and the above mentioned fields should be filled automatically.

### 1.8 Functions "Return Order", "Order" and "Credit Memo"

In order to receive the damaged goods from a complaint of Source Type = Customer a sales return order can be created with the function "Return Order". It opens a request form where the item (default from item no. in header), the item variant code (default from header), the location code and the description (default complaint no.) can be chosen. The description will be entered as text line and will be the first line of the new document. The functionality is in principal the same for creating sales orders or sales credit memos. It is also similar for the purchase part.

If the goods need to be sent to the vendor a purchase complaint will be set up and a purchase return order (or purchase order, or purchase credit note) can be created from the purchase complaint.

All complaint related documents must be created automatically and the form of the related documents will not be editable. Other possibilities were discussed, but it was decided to force the users to use the complaint module and the functions as the common way of working.

By using the functions to create orders, return orders etc., or by posting documents, an entry in the related documents table is created. From the related documents the documents can be directly opened. The new table "Related Document" has the following fields.

#### Complaint Action

Field Name	Type	Further Information
Complaint Doc. Type	Options: <ul style="list-style-type: none"> <li>• "complaint",</li> <li>• "finished complaint",</li> <li>•</li> </ul>	
Complaint Doc. No.	Code 20	
Related Doc. Type	Option <ul style="list-style-type: none"> <li>• Order</li> <li>• Return Order</li> <li>• Credit Memo</li> <li>• Posted Invoice</li> <li>• Posted Shipment / Receive</li> <li>• Posted Credit Memo</li> </ul>	
Related Doc No.	Code 20	

The Actions "Return Order", "Order" and "Credit Memo" are generic, i.e. for a Purchase Complaint the related purchase documents are generated, for a Sales Complaint the related sales documents are created respectively.

Using the function "Related Documents" opens a list that shows all documents created with the function "Return Order", "Order" and "Credit Memo" and also the related posted documents.

Search

Show Document

Page

More options

VIEW - COMPLAINT RELATED DOCUMENTS

X

Reminder: your work date is 1/29/2021

Use today | Change to... | Turn off reminder

Complaint Doc. Type ↑ ▼	Complaint Doc. No. ↑ ▼	Source Type ↑ ▼	Related to Doc. Type ↑	Related to Doc. No. ↑
Complaint	RMA0013	Customer	Order	1083
Complaint	RMA0013	Customer	Return Order	1009

## Test Case

From a complaint, use the function "Create Return Order". A request page is supposed to open, already filled with the item, item variant, location code and description of the complaint header as default values. Confirm this and a new return order should be created, linked to the complaint. Open the return order via the action button "Return Order". The description of the complaint header should be displayed as a text line and an item line should be displayed with the item.

## 1.9 Return Management

The management of return-related processes can include the following:

- Posting of return shipments
- Shipment of replacement items to customers
- Inspection of returned items
- Sending returned items to vendors as complaint
- Scrapping without receivement

The scope of these processes depends on many factors, such as the following:

- Customer's request
- Reason for return
- Item type and value
- Cause of damage

### 1.9.1 Manage Customer Returns

The sales return order can be created manually or with the function "Copy Document...". Furthermore, it will be created from the complaint module (see above). When the item arrives at your company the receipt and credit memo can be posted and the credit memo is sent to the customer.

SALES RETURN ORDER ✓ SAVED

1006 · ANHA GmbH

Process Release Posting Request Approval Print/Send Return Order Navigate Actions Navigate Fewer options

**General** Show less

Customer No. ....	C00010	Posting Date .....	8/18/2020
Customer Name .....	ANHA GmbH	Order Date .....	8/18/2020
SELL-TO .....		No. of Archived Versions .....	0
Address .....	An der Kleinen Mulde 64	Your Reference .....	
Address 2 .....	App 36	External Document No. ....	
State .....	NRW	Salesperson Code .....	AHA
ZIP Code .....	32549	Operator Code .....	AHA
City .....	Bad Oeynhausen	Campaign No. ....	
Country/Region .....	DE	Responsibility Center .....	
Contact No. ....	CT000258	Assigned User ID .....	
Contact .....	Andre Haft	Status .....	Open
Document Date .....	8/18/2020		

Lines | Manage | More options

Type	No.	Description	Description 2	Cancellation Date	Return Reason Code	Location Code	Quantity	Unit of Measure Code	Unit Price Excl. Tax	Tax Area Code	Tax Group
→ Comment		Invoice No. 103042:									*
Comment		Inv. No. 103042 - Shpt. No. 1020...									
Item	1850	Saddle				BLUE	10	PCS	123.00		

For re-shipping of items, a new sales order must be created. This can be done out of the complaint module, or out of the sales return order by using the function "Create return related documents", or by inserting a negative line in the sales return order and using the function "Move negative lines ...".

#### Note:

If complaint module is used, all related documents must be created out of the complaint.

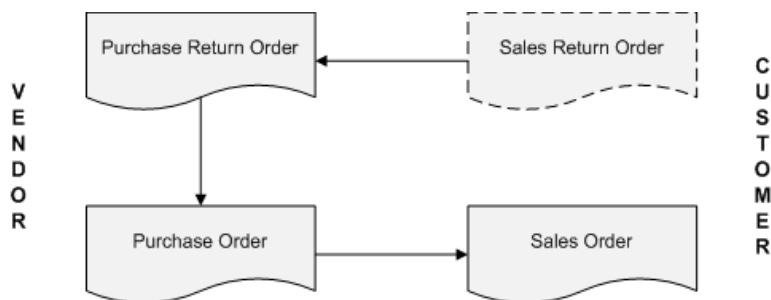
For sales return orders the approvals can be used. For details about delegating approvals see the procurement and logistics documentation.

### 1.9.2 Items returned for Vendor Complaint

When a customer ships an item in case of complaint, several documents must be created. These include the following:

- Sales return order
- Purchase return order
- Purchase order
- Sales order

The flow of these documents is shown in the sales return documents flow figure.



To generate return-related documents, the standard NAV function can be used to automatically create all these documents.

#### CREATE RET.-RELATED DOCUMENTS

##### Saved Settings

Changes to the options and filters below will be saved only to: 'Last used options ar

Use default values from: ..... Last used options and filters

##### Options

###### RETURN TO VENDOR

Vendor No. ....

Create Purch. Ret. Order ..... ☒

Create Purchase Order ..... ☒

###### REPLACEMENT

Create Sales Order ..... ☒

The created documents should all have the same complaint number, in order to open the documents also from the complaint module.

---

## **1.10 Hide standard fields in standard pages and lists and rename CORE fields**

Microsoft delivers with Business Central possibilities to add needed standard fields in a very easiest way. For this reason all additionally added standard fields are hide from pages and lists. If needed local partners must made visible these field with page extensions.

Furthermore, all CORE fields renamed with prefix “PM”. Users will see the field names without the prefix.