

# Georg – Claims & Complaints



## Welcome to Georg!

Georg is your all-in-one solution for efficiently managing customer complaints and claims within Microsoft Business Central.

Georg facilitates the registration, tracking, and follow-up of complaints and claims, ensuring efficient issue management, ensuring nothing falls through the cracks.

## Accessing the System

Finding Georg is simple and intuitive:

1. Launch your Microsoft Business Central application
2. In the search bar at the top, type either "Georg" or "claims"
3. Click on "Georg - Claims & Complaints" when it appears in the dropdown menu

You'll immediately be welcomed by Georg's user-friendly main menu, your central hub for all complaint and claim management activities:

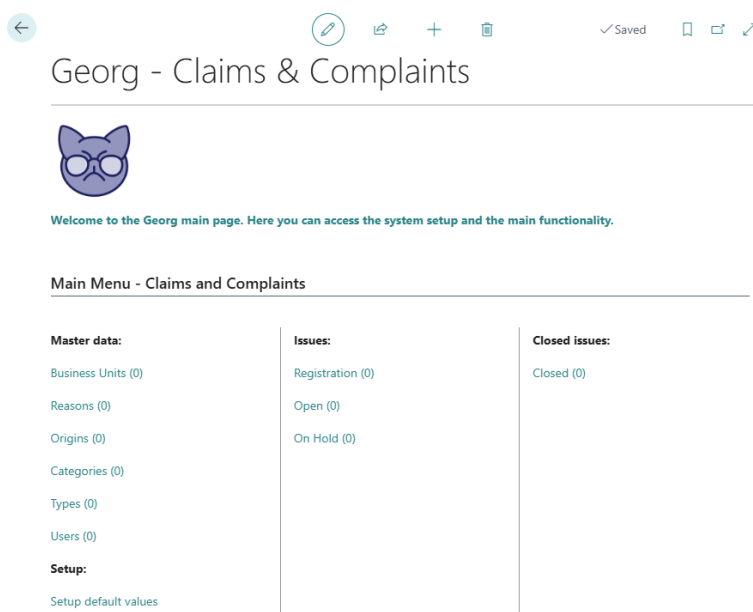


Image 1 – Main menu for setting things up and managing claims and complaints

## First-Time Configuration

Before diving into daily operations, you need to configure Georg to match your business needs. This can be done by selectin the “Setup default values” option:

### Main Menu - Claims and Complaints

<b>Master data:</b> <a href="#">Business Units (0)</a> <a href="#">Reasons (0)</a> <a href="#">Origins (0)</a> <a href="#">Categories (0)</a> <a href="#">Types (0)</a> <a href="#">Users (0)</a> <b>Setup:</b> <a href="#">Setup default values</a>	<b>New Issue:</b> <a href="#">Create a New Issue</a> <b>Issues:</b> <a href="#">In Registration (0)</a> <a href="#">Processing (0)</a> <a href="#">On Hold (0)</a>	<b>Closed issues:</b> <a href="#">Closed (0)</a>
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Image 2 – Selecting to setup the default values

## Configuring the complaints number series

- Navigate to "Setup default values" in the main menu (see image 2)
- Select "Add Default Number Series" to use the default series or drill into the “Complains Nos.” field to create your own
- Choose a numbering pattern that makes sense for your organization (the default numbering series starts with ISSUE0001)

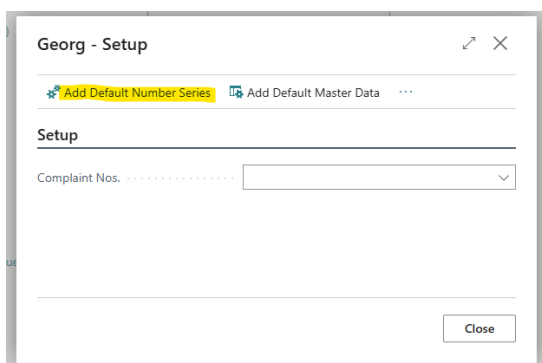


Image 3 – Setting up the default number series for complaints

## Import ready-to-use master data

- Click "Add Default Master Data" to instantly populate your system with 42 generic default values
- This time-saving feature adds:
  - 5 Business Units (perfect for departmental organization)
  - 12 Common Reasons (covering typical customer issues)
  - 13 Origins (identifying where complaints originate from)
  - 10 Categories (for strategic grouping and analysis)
  - 2 Types (used to distinguish between “Critical” and “Regular” issues)

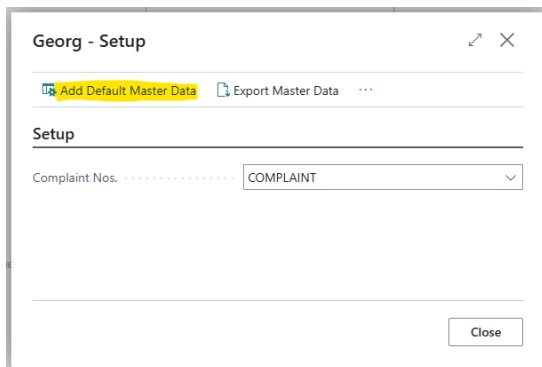


Image 4 – Adding the default master data

If we need to move master data information between systems, we also have the option to export and import the master data values to and from a file.

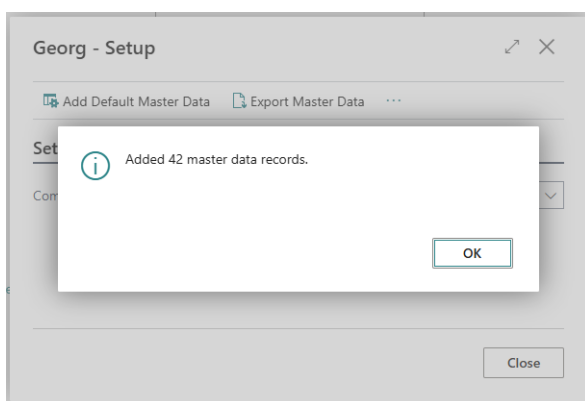


Image 5 – Included in the setup we have 42 values that can be used to get started

These defaults provide a quick starting point but can be customized as needed. The default values can be modified, added, or removed to align with each company's specific requirements.

## Customize the master data to fit your business needs

- Review the imported master data and adjust it to reflect your specific business terminology
- Add, modify, or remove entries as needed. Georg is designed to adapt to your processes, not the other way around.

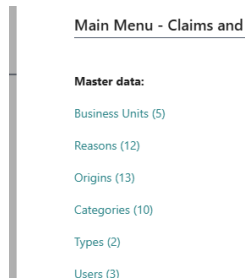


Image 6 – When the default values have been set up, we can see an updated count of the master data in the main menu

If we for an example need add a new reason we can click on the “Reasons” option and access the list of reasons to make the needed adjustments:

Reasons

🔍 + New 📋 Edit List 🗑 Delete

Reason Code ↑	Reason Description
→ BAD_TEMP	Temperature outside acceptable range
DISCOLOR	Abnormal product color or appearance
DMG_PKG	Damaged boxes, containers or pallets
DOC_ISS	Document issues
FRZ_ISS	Signs of freezer burn
INVOICE	Something wrong regarding the invoice
LATE_DEL	Late delivery outside schedule
OFF_ODOR	Unusual or unpleasant smell
QTY_SHORT	Quantity Shortage: Less quantity than ordered

Image 7 – The list of reasons that can be changed as needed

## Working with Claims and Complaints

When the number series and the master data have been setup we can start registering and working with the system. From the main menu, select "Create a New Issue":

### Claims and Complaints

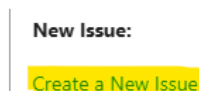


Image 8 – To create a new complaint or claim we simply choose “Create a New Issue”

Georg automatically assigns the next number in your number series sequence.

A page opens and we can start registering information such as "Registration Date" "Registered By", "Business Unit", "Customer Number/Name", "Origin (e.g., CUSTOMER)" "Reason (e.g., INVOICE)" and "Category (e.g., BILLING)":

Image 9 – In the complaint page we first register the main values such as date, customer, reason and category

Some of the information is automatically filled in by default, if applicable. Once the main details on the page have been entered, you can change the status of the complaint to “Processing”.

Image 10 –Changing the status of a complaint

When processing a complaint, there are various additional options to consider. First, on the complaint card, there is a section called “Incident Logging” where you can register details about the incident, including its cause and how the complaint was received. This section can both cover what happened and who was involved.

Incident Logging

Actions ▾

	Description		Date	Registered By
→	Got a phone call about an incorrect invoice.	⋮	4.3.2025	KS

Image 11 – Below the main header we can register the reason for the complaint

While solving the issue, it is also possible register all the steps required to resolve and close the case under the “Resolution Actions” section.

## Resolution Actions

Actions ▾

Description		Original Sales Invoice	Sales Credit Invoice	New Sales Invoice	Date	Supervisor
→ Sales Invoice 103032 needs to be adjus...	⋮	103032			4.3.2025	MM

Image 12 – In addition to registering the incident we can register what steps were taken to resolve the issue

In addition to the sections for registering what happened and what was done to solve the issue we have sections for additional information and some more detailed descriptions if needed.

### Additional Information

#### Cost Information

Claim ☐

Claim Type General Claim ▾

Estimated Cost 100.000,00

Actual Cost 110.000,00

#### Resolution Information

Closed By

Closed Date

Closed Comment

### Additional Description

This is how the product was received ...




Image 13 – Additional information and descriptions can easily be added

## Changing the Status and Closing an Issue

If it takes some time to resolve a complaint, for example if we need to wait for something to be resolved then we can put it on hold:

Complaint Card - Complaint ISSUE0001 - Open

Manage || Change Status to On Hold ⬇ Change Status to Closed Page

### General

No. ISSUE0001 ... Origin

Registration Date 4.3.2025 📅 Reason

Responsible MM ▾ Category

Image 14 – The complaint can both be put on hold or directly closed if the issue has been resolved

## Update the status as needed

- Click "Change Status to Processing" when active work begins
- Select "Change Status to On Hold" if you're waiting for information
- Choose "Change Status to Closed" once the issue is fully resolved

### Main Menu - Claims and Complaints

<b>Master data:</b> Business Units (5)	<b>New Issue:</b> Create a New Issue	<b>Closed issues:</b> Closed (2)
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Image 15 – Accessing the list of closed issues

When an issue has been resolved it is not possible to change it unless it is opened again and moved back to processing.

List of Closed Complaints						
No. ↑	Customer No.	Business Unit Code	Category Code	Type Code	Origin Code	Currency Code
ISSUE0001	27321782	SALES	BILLING	REGULAR	CUSTOMER	
ISSUE0002	01905893	SALES	ENV.	CRITICAL	CUSTOMER	

Image 16 – It is possible to view a list of the closed complains and for easy to export to Excel for further analysis

## Pro Tips for Success with Georg

- **Consistent Documentation:** Establish team standards for how incidents and resolutions should be documented
- **Regular Reviews:** Schedule weekly reviews of open complaints to prevent issues from stagnating
- **Response Time Monitoring:** Use the registration and closure dates to track your team's responsiveness
- **Root Cause Analysis:** Use categories and reasons to identify recurring issues that might need systemic fixes
- **Performance Metrics:** Track resolution rates and customer satisfaction to measure your team's effectiveness

## Conclusion

Georg is more than just a complaint management system—it's a comprehensive tool for turning customer challenges into opportunities for service excellence. By following this guide, you'll create a structured approach to complaint management that satisfies customers, protects your reputation, and continuously improves your business operations.

Happy complaint resolving!



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