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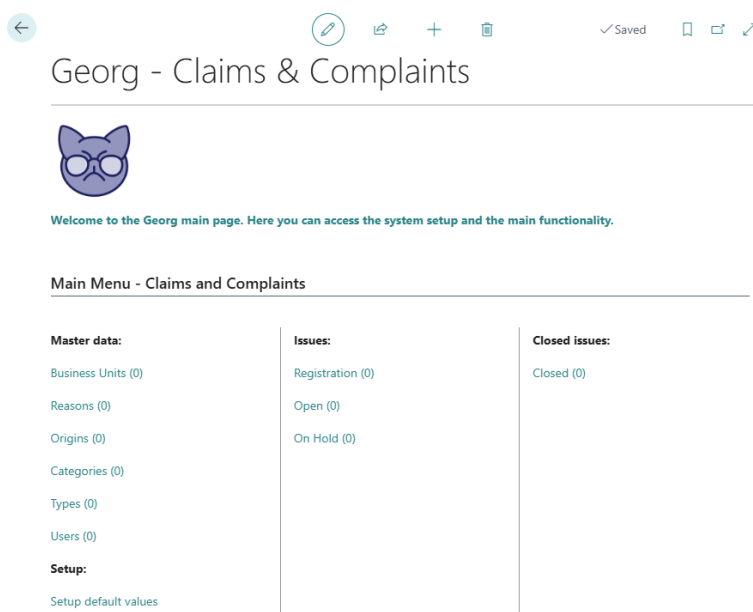

Image 1 – Main menu for setting things up and managing claims

First-Time Configuration

Before diving into daily operations, take a moment to configure Georg to match your business needs by selectin the "Setup default values" option:

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)
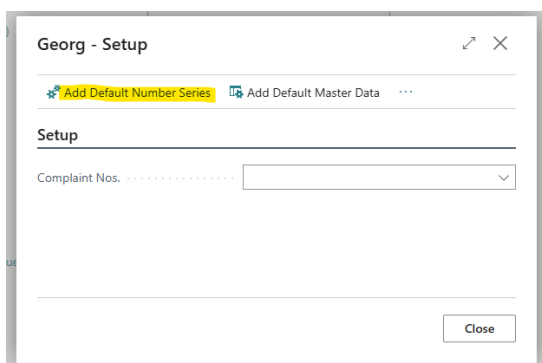

Image 3 – Setting up the default number series for complaints

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)

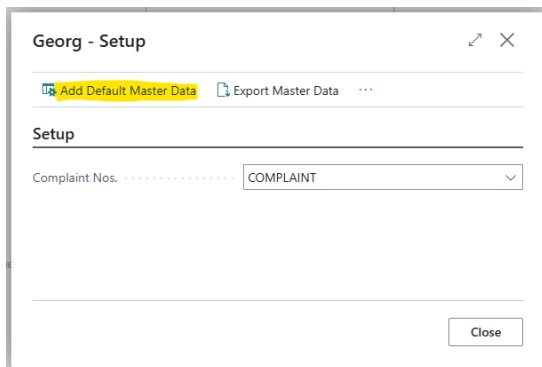   - 2 Types (used to distinguish between "Critical" and "Regular" issues)

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.
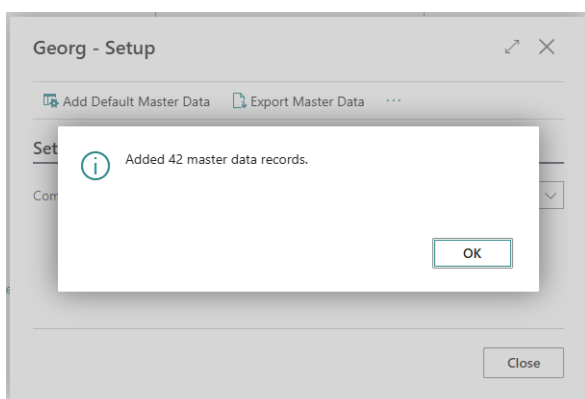

Image 5 – Included in the setup we have 42 values that can be used to get started

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 according to 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 (12) option and access the list of reasons to make the needed adjustments.
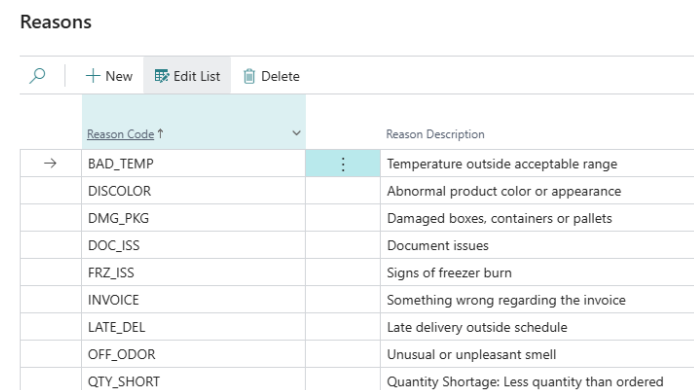

Image 7 – When the default values have been set up, we can see an updated count of master data in the main menu

Working with Claims and Complaints

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

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)", "Category (e.g., BILLING)" and "Supervisor".

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 the complaint to "Processing"

On the complaint page we have a section called "Incident Logging". There we can register details about the incident, including its cause and how the complaint was received. This covers both what happened and who was involved.

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

5

While solving the issue, you can also register all the steps required to resolve and close the case under the 'Resolution Actions' option.

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 also have sections for additional information and some more detailed descriptions.

Image 13 – If this is a claim it is possible to add cost information if applicable

Changing the Status and Closing an Issue

If it takes some time to resolve a complaint it can be put on hold and then changed back to processing.

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

Update the status thoughtfully

- 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

Image 15 – 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!

metadata