



# ProcessForce User's Guide

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# How to Guide – ProcessForce Complaint Management

ProcessForce provide a solution that allows to manage complaints from customers, suppliers or from internal departments. It allows to record, analyze and start action upon complaints, among other things. Check documents in this chapter to get more information on this subject.

## In this section

- [Document Series Setup – Configuration](#)
- [Complaint](#)
- [Complaint Group](#)
- [Complaint Reason](#)

## Path

Main Menu → Complaints

The screenshot displays the 'Complaint' window in ProcessForce. The window is divided into several sections:

- Header:** 'Complaint' with standard window controls.
- Form Fields:**
  - Series:** Supplier, 1
  - Complaint Type:** Supplier
  - Business Partner Code:** 00001
  - Business Partner Name:** ABC Inc
  - Contact Person:** Fred Barns
  - Warehouse Code:** 01
  - Project Code:**
  - Status:** Started
  - Created Date:** 18.04.12
  - Started Date:** 18.04.12
  - On-Hold Date:**
  - Closed Date:**
  - Originator:** Mark Jones
  - Owner:** Mary Smith
- Tabs:** Transactions, Action, Notes, Attachments.
- Item Details:**
  - Item Code:** Active-Item-01
  - Item Name:** Active-Item-01
  - Revision Code:**
  - Transaction Type:** Purchasing: Goods Receipt PO
  - Document No.:** 2
- Batch / Serial No. Details:**

#	Batch	#	Manufacturing Serial No.
1	2012-04-18-5	1	
2			
- Complaint Details:**

#	Reason Code	Reason Name
1	01	Covered in Oil
2	02	Broken
3	03	Wet
- Remarks:** A large text area for additional notes.
- Buttons:** OK, Cancel, and a 'You Can Also' dropdown.

## 1.1 Document Series Setup – Configuration

The [Complaints](#) Form uses the SAP Business One document numbering function.

### Document Numbering - Setup

Document	Default Series	First No.	Next No.	Last No.	Change Menu Names
Purchase Quotation Group	Primary	1	1		
Sales Blanket Agreement	Primary	1	1		
Purchase Blanket Agreement	Primary	1	1		
Stock Counting	Primary	1	1		
Purchase Request	Primary	1	2		
Incoming Payment Order	Primary	1	1		
Outgoing Payment Order	Primary	1	1		
Complaint	Supplier	1	3	1000	
Down Time	Primary	1	1		
Inventory_Register	Primary	1	1		
Manufacturing_Order	Primary	1	9	100	
NCMR_Transaction	Primary	1	1		
Operation_Time_Recording_Adj	Primary	1	1		
Operation_Time_Recording	Primary	1	1		
Pick_Order	Primary	1	11		

OK Cancel

In this example there are document series for each Compliant Type:

### Series - Complaint - Setup

		Number			String					
#	Name	First No.	Next No.	Last No.	Prefix	Suffix	Remarks	Group	Period Ind.	Lock
1	Supplier	1	3	1000	VED			1 ▾	Default ▾	<input type="checkbox"/>
2	Customer	1001	1001	2000	CUS			1 ▾	Default ▾	<input type="checkbox"/>
3	Internal	2001	2001	3000	INT			1 ▾	Default ▾	<input type="checkbox"/>

Display Series Linked to Selected Period(s) Indicator

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## 1.2 Complaint

In this form you can set all the details needed to create a Complaint, inter alia document type (Customer, Supplier, Internal), Contact Person, Warehouse or action needed to be performed as result of a Complaint.

### On this page

- [Complaint Header](#)
- [Transaction](#)
- [Action](#)
- [Notes](#)
- [Attachments](#)
- [Creating a Quality Control Test](#)
- [Creating an activity for a complaint](#)
- [Complaint status](#)

### Path

Complaints → Complaint

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### 1.2.1 Complaint Header

The form header allows the user to manage the following:

- Select and enter a complaint number using a defined Document Series Number
- Enter the source of the complaint, Customer, Supplier or Internal
- Select and enter the Business Partner Code. Note the lookup table filters the business partners based on Complaint Type. If chosen Complaint Type is Internal, Business Partner Code, Business Partner Name and Contact Person fields are grey out.
- Enter the Contact Person. Note the filter is based on the selected Business Partner Code.
- Enter the Warehouse and Project Code
- To manage the Complaint cycle, the user can select a Status and its corresponding Date. The valid values are Created, Started, On-Hold, Closed.



- Enter an Originator, i.e. the person who started the Complaint.
- Enter an Owner, i.e. the person who is responsible for managing the Complaint.
- An Alert can be generated to be sent to Complaint Manager to allocate the Owner.

**Complaint**

Series: Supplier 1  
 Complaint Type: Supplier  
 Business Partner Code: 00001  
 Business Partner Name: ABC Inc  
 Contact Person: Fred Barns  
 Warehouse Code: 01  
 Project Code:

Status: Started  
 Created Date: 18.04.12  
 Started Date: 18.04.12  
 On-Hold Date:   
 Closed Date:   
 Originator: Mark Jones  
 Owner: Mary Smith

**Item Details**

Item Code: Active-Item-01  
 Item Name: Active-Item-01  
 Revision Code:   
 Transaction Type: Purchasing: Goods Receipt PO  
 Document No.: 2

**Batch / Serial No. Details**

#	Batch	#	Manufacturing Serial No.
1	2012-04-18-5	1	
2			

**Complaint Details**

#	Reason Code	Reason Name
1	01	Covered in Oil
2	02	Broken
3	03	Wet

**Remarks**

OK Cancel You Can Also

## 1.2.2 Transaction

Transaction Type: Purchasing: Goods Receipt PO  
 Document No.: Purchasing: Goods Receipt PO

**Complaint Details**

#	Reason Code
1	01

This Tab allows the user to record Item related and Non-Item related Complaints.

If the Complaint is Item related, the user enters the Item, and optionally the Reason Code, that is the cause of the Complaint.

The user can also enter the Transaction Type, Document Number relating to the Complaint and also the associated Batch and Serial Numbers.

Note when the user enters the appropriate Transaction Type, only the data relating to the Business Partner is shown.

Batches and Serial Numbers can be added and/or deleted.

For recording and analysis purposes, multiple [Reason Code](#) can be added and/or deleted.

A remark can also be added.

Complaint

Series Supplier 1

Complaint Type Supplier

Business Partner Code 00001

Business Partner Name ABC Inc

Contact Person Fred Barns

Warehouse Code 01

Project Code

Status Started

Created Date 18.04.12

Started Date 18.04.12

On-Hold Date

Closed Date

Originator Mark Jones

Owner Mary Smith

Transactions Action Notes Attachments

Item Details

Item Code Active-Item-01

Item Name Active-Item-01

Revision Code

Transaction Type Purchasing: Goods Receipt PO

Document No. 2

Batch / Serial No. Details

#	Batch	#	Manufacturing Serial No.
1	2012-04-18-5	1	
2			

Complaint Details

#	Reason Code	Reason Name
1	01	Covered in Oil
2	02	Broken
3	03	Wet

Remarks

OK Cancel You Can Also

### 1.2.3 Action

If additional Action is required, the user can enter a sample quantity that will be returned from the Customer or to the Supplier.

The sample can be tracked by entering the corresponding Date and the desired location where the Sample will be placed.

An alert is sent to the Warehouse Manager to inform that a sample will be delivered.

- The alert is based on the following query, Status = Started, Business Partner Code and Name, Item Number, Batch/Serial Number, Delivery Date, Warehouse Code and Warehouse manager.



When the sample is received into the warehouse, based on a Return document, an alert is sent to the Complaint Owner.

- The alert is based on the following query, Status = Started, Complaint No, Business Partner Code and Name, Item Number, Batch/Serial Number, Received Date, Warehouse Code and Complaint Owner.

Complaint

Series	Supplier	1	Status	Started
Complaint Type	Supplier		Created Date	18.04.12
Business Partner Code	→	00001	Started Date	18.04.12
Business Partner Name	ABC Inc		On-Hold Date	
Contact Person	Fred Barns		Closed Date	
Warehouse Code	→	01	Originator	→ Mark Jones
Project Code			Owner	→ Mary Smith

Transactions	Action	Notes	Attachments
<b>Sample</b>		<b>Action</b>	
Quantity	10.000	Quality Test	<input checked="" type="checkbox"/>
Request Date	18.04.12	Quality Control Test	→ 1
Delivery Date	18.04.12	Product Recall	<input type="checkbox"/>
Received Date		<b>Remarks</b>	
Inspection Date			
Warehouse Code			

OK Cancel You Can Also

## 1.2.4 Notes

The Notes Tab allows the user to enter details of the Complaint.

Complaint

Series	Supplier	1	Status	Started
Complaint Type	Supplier		Created Date	18.04.12
Business Partner Code	→	00001	Started Date	18.04.12
Business Partner Name	ABC Inc		On-Hold Date	
Contact Person	Fred Barns		Closed Date	
Warehouse Code	→	01	Originator	→ Mark Jones
Project Code			Owner	→ Mary Smith

Transactions	Action	Notes	Attachments

OK Cancel You Can Also

## 1.2.5 Attachments

The Attachments Tab allows the user to attach documents relating to the Complaint.

The screenshot shows the 'Complaint' form with the 'Attachments' tab selected. The form contains several input fields for complaint details and a table for attachments.

#	Path	File Name	Attachment Date
1			

Buttons: Browse, Display, Delete, OK, Cancel, You Can Also

## 1.2.6 Creating a Quality Control Test

From the Action Tab, the user has the option to check that the Complaint requires a Quality Control Test and create a Quality Control Test from the You Can Also button.

The user can also check that this Complaint was the source of a Product Recall activity.

The screenshot shows the 'Complaint' form with the 'Action' tab selected. The form displays 'Item Details', 'Batch / Serial No. Details', and 'Complaint Details'.

#	Reason Code	Reason Name
1	01	Covered in Oil
2	02	Broken
3	03	Wet

Buttons: OK, Cancel, You Can Also (highlighted), Create Quality Control Test

## 1.2.7 Creating an activity for a complaint

Standard SAP Business One activity functionality is available to create and check within Complaint form.

The screenshot shows the 'Complaint' form in SAP Business One. The form is divided into several sections: 'Header Data', 'Item Details', 'Complaint Details', and 'Remarks'. The 'Header Data' section includes fields for Series, Complaint Type, Business Partner Code, Business Partner Name, Contact Person, Warehouse Code, Project Code, Status, Created Date, Started Date, On-Hold Date, Closed Date, Originator, and Owner. The 'Item Details' section includes fields for Item Code, Item Name, Revision Code, Transaction Type, and Document No. The 'Complaint Details' section includes a table with columns for Reason Code and Reason Name. The 'Remarks' section is a text area for additional information. A context menu is open over the 'Create Activity' button, which is highlighted with a red circle. The menu options are: 'What's this?', 'Remove', 'Close', 'Create Activity', and 'Activity Report'. The 'Create Activity' option is the one to be selected.

#	Reason Code	Reason Name
1	01	Covered in Oil
2	02	Broken
3	03	Wet

## 1.2.8 Complaint status

- **Created** – a document is created but not yet started, Create Date can be set up
- **Started** – a document is started, Started Date can be set up
- **On-Hold** – a document is on-hold (no action is take on it), On-Hold Date can be set up
- **Closed** – a document is closed, no further editing of the document can be done.

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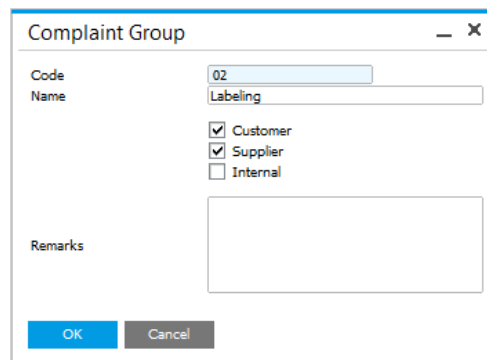
## 1.3 Complaint Group

### Path

Administration → Setup → Complaints → Complaint Groups

This form allows the user to define and edit Complaint Groups, to categorize [Reason Codes](#) for reporting and analysis purposes.

The Group can be used for customer, supplier and internal purposes. The user can pick more than one option simultaneously. Remarks can be added if needed.



The screenshot shows a window titled "Complaint Group" with a close button (X) in the top right corner. Inside the window, there are two input fields: "Code" with the value "02" and "Name" with the value "Labeling". Below these fields are three checkboxes: "Customer" (checked), "Supplier" (checked), and "Internal" (unchecked). At the bottom of the form is a large text area labeled "Remarks". At the very bottom of the window are two buttons: "OK" and "Cancel".

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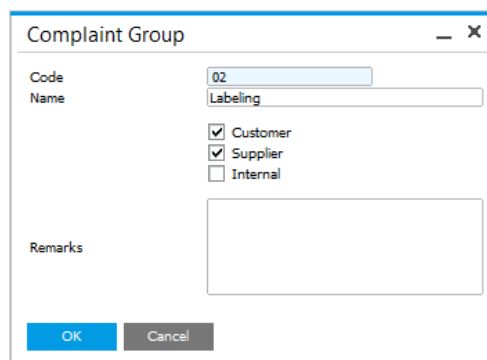
## 1.4 Complaint Reason

### Path

Main Menu → Administration → Setup → Complaints → Complaint Reasons

This form allows the user to define Reason Codes, to record why a complaint has been created, and used for reporting and analysis purposes.

The Reason Code, can be used for customer, supplier and internal purposes, and is used within the [Complaint](#) form.



The screenshot shows a window titled "Complaint Group" with a close button (X) in the top right corner. Inside the window, there are two input fields: "Code" with the value "02" and "Name" with the value "Labeling". Below these fields are three checkboxes: "Customer" (checked), "Supplier" (checked), and "Internal" (unchecked). At the bottom of the form is a large text area labeled "Remarks". At the very bottom of the window are two buttons: "OK" and "Cancel".



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