

Complaint Management

Module Guide: Complaint Management

Module Location

CRM > Complaint Management

Module Objective

The **Complaint Management** module functions as a centralized system to record, track, manage, and resolve every complaint received from customers. Using this module helps the company handle issues systematically, improve customer satisfaction, and identify frequently recurring problems with products or services.

1. Main View (Complaint List)

The main page of this module displays a list of all customer complaints that have been recorded in the system.

CRM | Complaint Management

Document Number

Any Part of Field

NONE

Search

Show All

Date From

1 July 2025

Date To

31 July 2025

Search

Category

All

Status

☐ Solved

☒ Not Solved

No.	Document Number	Requester	Complaint Date	Customer Name	Category	Solved Date	Attachment File
No Record							

New

View Explanation

This page serves as a dashboard to monitor all incoming complaints.

- Filters:** You can search for a specific complaint by **Document Number**, a **Date** range, **Category**, or most importantly, by **Status (Solved / Not Solved)**.

- **Complaint List:** The table below displays a summary of each complaint, with columns such as **Document Number**, **Requester**, **Complaint Date**, **Customer Name**, and **Category**.

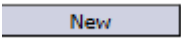
Button Functions

- **New:** The primary button to record a new complaint received from a customer.

2. Steps to Manage a Complaint

The following is the complete workflow from recording to resolving a customer complaint.

Step 1: Record a New Complaint

From the Main View, click the **New** button to open the **Add Complaint Management** form. 

Step 2: Fill in Complaint Details

Fill in all the relevant information on the form that appears. Fields marked with (*) are mandatory.

- **Complaint Date & Customer:** Select the date the complaint was received and the name of the complaining customer from the dropdown.

Complaint Date	31 July 2025	
Customer *	-- Select Customer --	

- **Category:** Choose the most appropriate complaint category (e.g., Product Quality, Delivery Delay, etc.).

Category *	New	
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- **Attachment / Reference Documents:** Attach supporting files (photos, emails) or link to other documents in the system (such as an invoice number or delivery order).

Attachment

Choose File No file chosen

- **Item Complained:** If the complaint is related to a specific product, click the **[+]** icon and add the product details in this section, such as **Item Code** and **Qty**. [\[+ Item Complained\]](#) [\[-\]](#)
- **Complaint Description:** Write down the details of the customer's complaint and completely in the description field.

Complaint Description ☐ Solved

Step 3: Save the Complaint

Click the **Save** button to record the new complaint into the system. Its status will automatically be set to 'Not Solved'.

Save

Step 4: Update Resolution Status

After the complaint has been successfully handled and a solution has been provided to the customer, reopen the complaint entry, add notes regarding its resolution, and check the **Solved** box. ☐ Solved

Tips & Important Notes

- Use the **Status** filter on the main page to quickly see all complaints that are still open (**Not Solved**) and require immediate follow-up.
- Always attach relevant supporting evidence using the **Attachment** or **Reference Documents** features to strengthen the record and facilitate investigation.

- This module is an important tool for the **Customer Service, Sales, and Quality Assurance** teams to monitor and improve the quality of services and products.

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