

YAVEON

ProBatch 365 Incident Management

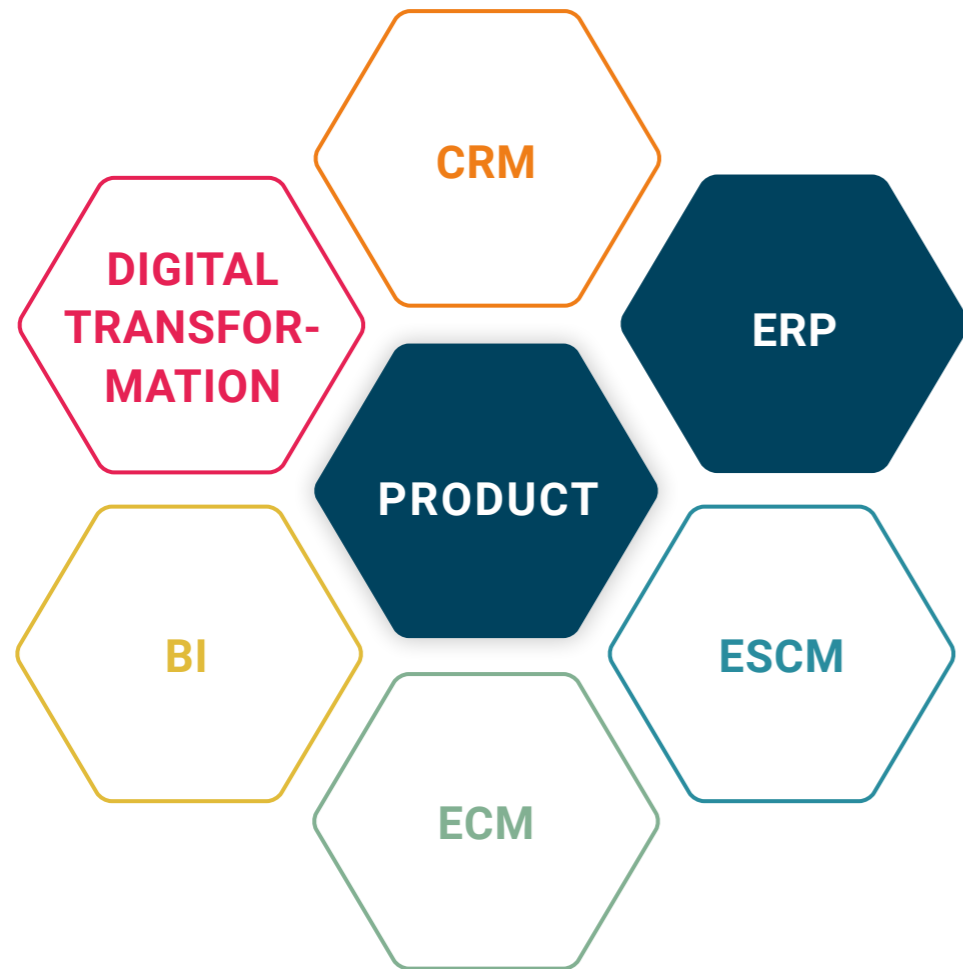
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Microsoft
Partner



EVERYTHING AT A GLANCE



BASIS

Microsoft Dynamics 365 Business Central

COMPANY SIZE

Small and medium-sized companies

INDUSTRIES

Chemicals, pharmaceuticals, biotechnology, cosmetics, food, medical technology



CENTRALIZED RECORDING

Complaints or incidents of any kind can be recorded centrally in Business Central and further processed from there. Supply chain issues are fully integrated with Business Central, to enable seamless monitoring.



TIME-SAVING AUTOMATION

An incident document refers to an internal report when a problem is detected, or the report was made by a customer or supplier. The system automatically transfers the data of items and lots from the origin document to the incident document.



SATISFIED CUSTOMERS AND SUPPLIERS

After evaluation and the determination of necessary actions, a return order or credit memo is generated for the customer or vendor to ensure a long-term positive working relationship.

IF YOU'RE NOW WONDERING HOW THIS ALL WORKS, YOU'VE COME TO THE RIGHT PLACE:

The features

Create an incident

An incident document refers to an internal report when a problem is detected, or the report was made by a customer or vendor. The data of items and lots can be automatically retrieved from the document of origin, e.g., an inspection order or a posted purchase delivery can be transferred to the incident document.

Assign information about the incident

You can easily add all necessary information to the incident document. Use incident types to classify the incident and specify possible costs. In addition, return reasons, complaint causes, and the general description of the incident can help to pinpoint the reasons for the incident. Assign error codes and add a detailed description for each item or lot information. Then assign immediate, corrective, and preventive actions to solve the problem, or address the issue.

The screenshot shows the 'Posted Purchase Receipt' interface for document 107225. A 'Create Incident' button is highlighted in the top navigation bar. Below, the 'General' section contains various data fields:

No.	107225	Buy-from	Document Date	1/18/2024
Buy-from Vendor No.	K00080	Name	Requested Receipt Date	
Buy-from Contact No.	KT000216	Address	Promised Receipt Date	
		Address 2	Quote No.	
		City	Order No.	106342
		Post Code	Vendor Order No.	
		Country/Region	Vendor Shipment No.	
		Contact	Order Address Code	
		No. Printed	Purchaser Code	DSM
		Posting Date	Responsibility Center	

The 'Lines' section at the bottom shows a table with columns: Type, No., Item Reference No., Description, Location Code, Quantity, Receipt Date, Unit of Measure Code, Quantity Invoiced, Planned Receipt Date, Expected Receipt Date, Order Date.

The screenshot shows the 'Incident Card' interface for document IM000001. It includes fields for 'Source Document Type' (None), 'Target Document Type' (None), and 'General Incident Desc.'. Below, the 'Actions' section contains a table:

Action Code	Action Description	Act... com...	Action to be completed until	Action completed at	Correction/Pr... Action Code	Correction/Prevention Action Description	Corr... Act... com...	Correction... Action to be completed until	Correction... Action completed at	Ret... just...
L.BLOCK	Block Lot	<input checked="" type="checkbox"/>		1/18/2024	C_MAT_STOR...	Improve Material Storage	<input type="checkbox"/>	5/12/2024		<input type="checkbox"/>

On the right, the 'Incident Error Code' section shows a table with columns: Code, Details, Quit.

PACK	Packaging damaged	
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At the bottom, there is a table for item details with columns: No., Description, Var... Code, Serial No., Lot No., Package No., External Lot Number, Location Code, Quantity, Unit of Measure Code.



Create Follow-Up Documents

After reviewing and defining necessary action, a return order or credit memo is generated for the customer or vendor if necessary. The incident document can now be closed.

← Purchase Credit Memo
✎ ⏪ + 🗑

1004 · Le Clerk Promotions

Home Prepare Request Approval Credit Memo More options

📄 Post
📄 Release
📄 Apply Entries...
📄 PB365 Header Texts
📄 PB365 Footer Texts

General Show more

Vendor Name	Le Clerk Promotions	Due Date	1/18/2024	Vendor Authorization ...	
Contact	Janine Le Clerk	Expected Receipt Date		Vendor Cr. Memo No. *	
				Status	Open

Lines | Manage Functions Line 🔗 📄

📄 New Line
✖ Delete Line
📄 Insert Ext. Texts
🔗 Dimensions
📄 Deferral Schedule
🔗 Redistribute Account Allocations
🔗

Type	No.	Description	Location Code	Quantity	Unit of Measure Code	Direct Unit Cost Excl. VAT	Tax Area Code	Tax Group Code	Line Discount %	Lir
→ Charge (It...	PUR-INCIDE...	Purchase Discount due to Incident	BERLIN	1,000	KG	4.22				
Charge (It...	PUR-INCIDE...	Purchase Discount due to Incident	BERLIN	200	KG	4.22				

Subtotal Excl. VAT (EUR)	5,064.00	Invoice Discount %	0	Total VAT (EUR)	0.00
Inv. Discount Amount...	0.00	Total Excl. VAT (EUR)	5,064.00	Total Incl. VAT (EUR)	5,064.00

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