



MB&G INSURANCE

Dreams System

How To Leave A Note

01.11.24

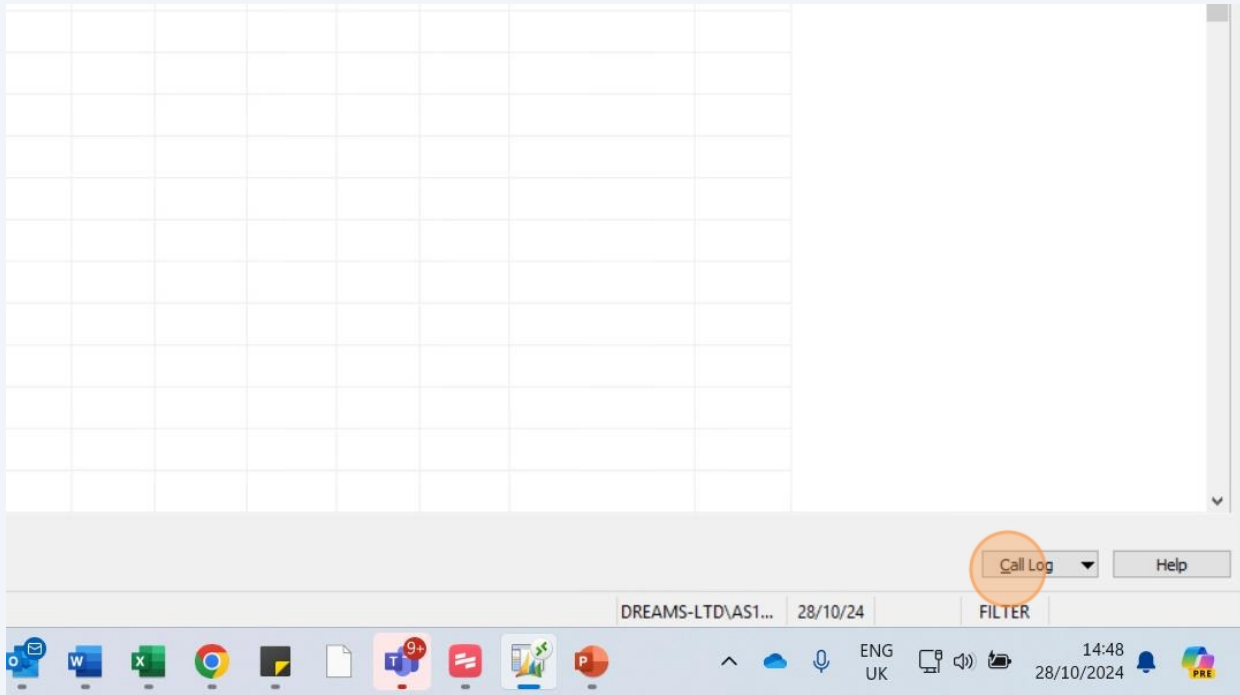
Dreams System Process: How to Leave a Note

1 Click "VCS"

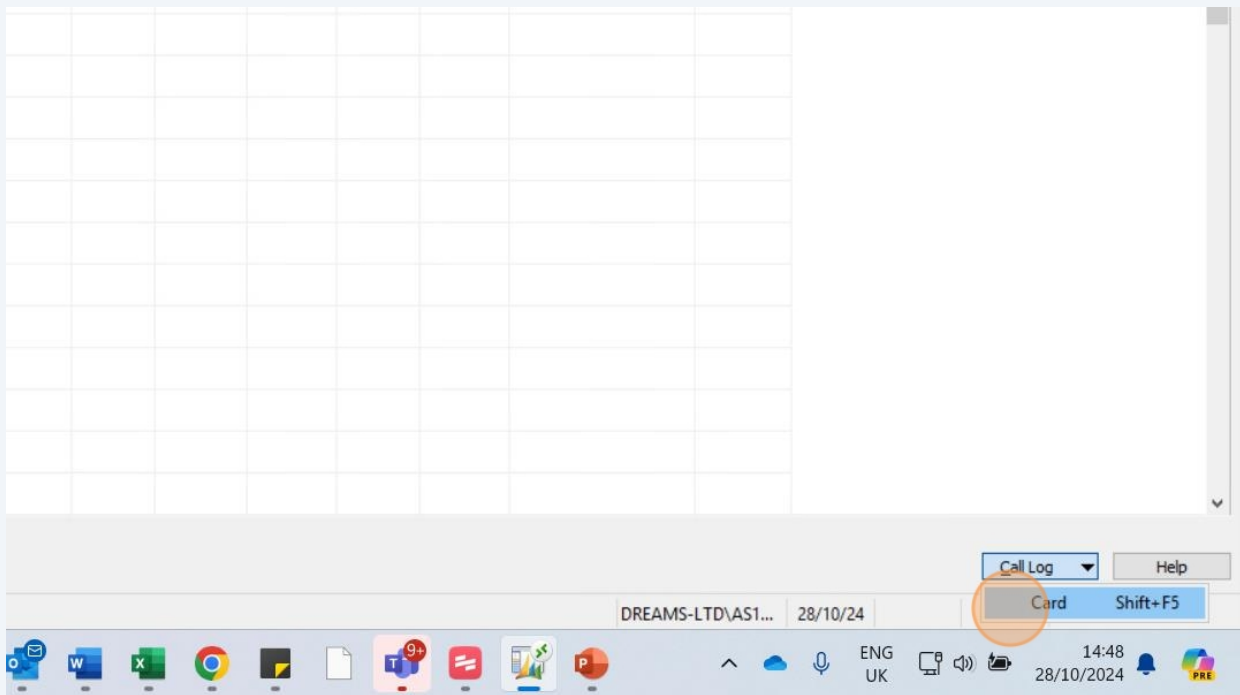
The screenshot displays a software interface with a table of warranty items. The table has columns for 'Warranty Description', 'Warranty Item No.', 'MTM', 'Route No.', 'Postcode', 'Description', and 'Quantity'. A search dialog box is open on the left with buttons for 'Find First', 'Find Next', 'Find Previous', 'Go Back', 'Close', 'Replace...', and 'Help'. Below the table, the 'Delivery Status' is set to 'Waiting'. A button labeled 'VCS' is highlighted with an orange circle. Other buttons include 'Comments', 'Contact/Actions L', and 'P'std Del. Schedul'. The Windows taskbar is visible at the bottom with various application icons.

Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description	Quantity
			LL	LL 18 5JQ	256-00175 Hopkins SK Ottoman Fabric Oatmeal	
			LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	1
			LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box2(SRail,CR,Cyl,MSupp	1
			LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box3(Top Base)	1
			LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box4(Bottom Base)	1
			LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box5(Mechanism)	1
220919_102713 BED HI 8	256-00175		LL	LL 18 5JQ	Bed Cover Primary Item	1
			LL	LL 18 5JQ	Store Discretionary 5.0% - 10%	1
			LL	LL 18 5JQ	Assembly - Ottoman Bedframe D,K,SK (Inc Drw)	1
			LL	LL 18 5JQ	Deacon Storage Box Natural Fabric	1
			LL	LL 18 5JQ	Furniture Range 3 for 2	1
			LL	LL 18 5JQ	Kimberley Bedside Oatmeal	2
			LL	LL 18 5JQ	Furniture Range 3 for 2	1
			LL	LL 18 5JQ	Free Del Over £100 Mon-Fri (Chargeable Weekends)	1

2 Go to "Call log"



3 Click "Card"



4 Go to "Logs"

Dreams LIVE - Microsoft Dynamics NAV Classic - [B322-REF000000739 - VCS Log]

File Edit View Tools Window Help

Reference No. Order No. Priority CSI Allocated To

B322-REF00000007 Order 322A007614 No No BRANCH

General **Logs** Linked Docs

Name

Type of Contact . . Phone

Type Info

Comments.

House No./Name . . 20

Address Line 1

Address Line 2 . . . Kinmel Bay

City Rhyl

County Clwyd

Postcode

Tel. No. (Work)

Tel. No. (Home)

5 Scroll to the bottom to get to the next available line.

Dreams LIVE - Microsoft Dynamics NAV Classic - [B322-REF000000739 - VCS Log]

File Edit View Tools Window Help

Reference No. Order No. Priority CSI Allocated To Overdue Status

B322-REF0000000... Order 322A007614 No No BRANCH No New

General **Logs** Linked Docs

Log Lines

Line Status	Log Reason	Fault	Info Code 1	Info 1	Info Code 2	Info 2	Reason for Parts	Parts Required	Comments
(3) Closed	Defective Mattress	Not Applicable / No Fault	016-00635	Hopkins SK Ottoman Oatmeal Box 1(head&Foot End)	V03636	KAYDIAN	Others (...)	0	

Activity Lines

Logged On	Logged At	Logged By	Contact Call	Action	Task	Activity Reason	Voucher Amount	Voucher Number	Allowance Amount	Comments
26/09/19	10:05:46	BRANCH	Action	Store Use Only - Order A...	Store - order amendment	Add on product / service				add on f.o.c delivery
26/09/19	10:07:31	BRANCH	Outgoing...	Book Delivery or Collection	Close - Delivery Booked	Arrange Delivery/Coll...				Delivery booked for Wednesday, November 6, 2019
27/07/23	11:49:17	Amy Stephe...	Action	No Action	Information only - Close ...	Defective Bedstead/KL...				Test note.
28/07/23	16:35:05	Yasmin Ellis	Action	No Action	Helpdesk - refer to store	Defective Divan				new claim assigned to emmira
					ned	Defective Bedstead / ...				Report advises no manufacturing fault with bed, overloading - claim rejected

Find what: LL18 5JQ

Match: [X] Whole Field [] Beginning of Field [] Any Part of Field

Match Case: [X]

Use the Best Key: []

Find As You Type: []

Find First Find Next Find Previous Go Back Close Replace Help

Create New Functions VCS Log Help

DREAMS-LTD\AS1... 28/10/24 NEW INS

ENG UK 14:49 28/10/2024

6 Click the grey box in the "Log reason" column

Reference No.	Order No.	Priority	CSI	Allocated To
B322-REF000000...	Order 322A007614		No	BRANCH

Line Status	Log Reason	Fault	Info Code 1	Info 1	Info Code 2	Info 2	Rea Part
(3) Closed	Defective Mattress	Not Applicable / No Fault	016-00635	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	V03636	KAYDIAN	Oth
→							

Logged On	Logged At	Logged By	Contact Call	Action	Task	Activity Reason	Voucher Amount	Voucher Number
26/09/19	10:05:46	BRANCH	Action	Store Use Only - Order A...	Store - order amendment	Add on product / service		
26/09/19	10:07:31	BRANCH	Outgoing...	Book Delivery or Collection	Close - Delivery Booked	Arrange Delivery/Coll...		
27/07/23	11:49:17	Amy Stephe...	Action	No Action	Information only - Close ...	Defective Bedstead/K...		
28/07/23	16:35:05	Yasmin Ellis	Action	No Action	Helpdesk - refer to store	Defective Divan		

7 Double click to select your product

Dreams LIVE - Microsoft Dynamics NAV Classic - [Reason List]

File Edit View Tools Window Help

Code	Description
CR	Cancellation Request
D_1ST	Distribution 1st inbound calls
DEF01	Defective Mattress
DEF02	Defective Divan
DEF03	Defective Bedstead/Kids Beds
DEF04	Defective Furniture
DEF05	Defective TV/ Sleep Motion/ Tech Bed
DEF07	Defective Headboard
DEF08	Defective Sofa Bed
DEF09	Defective Softs
DNCREQ	Do Not Contact Request
FIN	Finance Query
GDPR	GDPR Data Breach
GDPRDSAR	GDPR DSAR
LP	Late Payment by Customer
ORD	Order Confirmation
PC	Deaded in Error
RD	Rebooked Delivery
RD01	Re-book delivery - Customer Changed Mind
AOP	Add or remove product

10 Double click on the part the customer is claiming for.

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Status	Delivery/Projected Date	Delivery Date	Sell-to Customer No.	Type	No.	Description	Quantity	Location Code	Stock T
	06/11/19	06/11/19	B322	Item	016-00635	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	1	HDD-WA	FDSS
	06/11/19	06/11/19	B322	Item	016-00636	Hopkins SK Ottoman Oatmeal Box2(SRail,CR,Cyl,MSupp	1	HDD-WA	FDSS
	06/11/19	06/11/19	B322	Item	016-00637	Hopkins SK Ottoman Oatmeal Box3(Top Base)	1	HDD-WA	FDSS
	06/11/19	06/11/19	B322	Item	016-00638	Hopkins SK Ottoman Oatmeal Box4(Bottom Base)	1	HDD-WA	FDSS
	06/11/19	06/11/19	B322	Item	016-00639	Hopkins SK Ottoman Oatmeal Box5(Mechanism)	1	HDD-WA	FDSS
		06/11/19	B322	Item	223-00037	Bed Cover Primary Item	1		Charge
		06/11/19	B322	Item	Z11-00157	Store Discretionary 5.0% - 10%	1		Value D
		06/11/19	B322	Item	Z22-00130	Assembly - Ottoman Bedframe D,K,SK (Inc Drw)	1		Charge
	06/11/19	06/11/19	B322	Item	020-01142	Deacon Storage Box Natural Fabric	1	HDD-WA	FDSS
		06/11/19	B322	Item	Z11-00123	Furniture Range 3 for 2	1		Value D
	06/11/19	06/11/19	B322	Item	810-00121	Kimberley Bedside Oatmeal	2	HDD-WA	FDSS
		06/11/19	B322	Item	Z11-00123	Furniture Range 3 for 2	1		Value D
		06/11/19	B322	Item	Z22-00134	Free Del Over£100 Mon-Fri (Chargeable Weekends)	1		Charge

11 Double click on the fault

Dreams LIVE - Microsoft Dynamics NAV Classic - [Parts]

File Edit View Tools Window Help



Reason Code	Code	Description
DEF03	ALI	Alignment (Manufacturing Fault)
DEF03	BS	Damaged by delivery crew / Packaging Damage (Delivery Damage)
DEF03	BTSS	Bolt / Thread / Screws / Sockets (Manufacturing Fault)
DEF03	CNSQ	Creaking / Squeaking (Manufacturing Fault)
DEF03	CSD	Scratch / Mark / Rust / Paint / Chipped / Glue / Dent (Manufacturing Fault)
DEF03	FFS	Fraying Fabric/Stitching (Manufacturing Fault)
▶ DEF03	HMM	Others (Manufacturing Fault)
DEF03	OTHER	Others (Delivery Damage)
DEF03	PF	Ottoman Piston Issue (Manufacturing Fault)
DEF03	PF1	Poor/faulty painted/gloss/ finish (Manufacturing Fault)
DEF03	SCB	Slat Caps Broken (Manufacturing Fault)
DEF03	SFF	Collapsed / Snapped / Broken in use (Frame) (Manufacturing Fault)

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Click "Dreams LIVE - Microsoft Dynamics NAV Classic - [TYG - User Menu] (DREDC2RDSB01.dreams.co.uk)"

Activity Lines

	Logged On	Logged At	Logged By	Contact Call	Action	Task	Activity Reason	Voucher Amount	Voucher Number
▶	26/09/19	10:05:46	BRANCH	Action	Store Use Only - Order A...	Store - order amendment	Add on product / service		
	26/09/19	10:07:31	BRANCH	Outgoing...	Book Delivery or Collection	Close - Delivery Booked	Arrange Delivery/Coll...		
	27/07/23	11:49:17	Amy Stephe...	Action	No Action	Information only - Close ...	Defective Bedstead/K...		
	28/07/23	16:35:05	Yasmin Ellis	Action	No Action	Helpdesk - refer to store	Defective Divan		
	15/11/23	11:06:10	Susan Barker	Incoming...	Repair/ Inspection	Claim declined	Defective Bedstead / ...		

Update Status

Fault Code: Not Applicable / No Fault

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Click the grey box in the "Action" column

General | **Logs** | **LINKED DOCS**

Log Lines

	Line Status	Log Reason	Fault	Info Code 1	Info 1	Info Code 2	Info 2	Reason for Parts	Parts Required	Comment
	(3) Closed	Defective Mattress	Not Applicable / No Fault	016-00635	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	V03636	KAYDIAN	Others (...)	0	
▶	(0)	Defective Bedstead/Kids Beds	Not Applicable / No Fault	016-00635	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	V03636	KAYDIAN	Others (...)	0	

Activity Lines

	Logged On	Logged At	Logged By	Contact Call	Action	Task	Activity Reason	Voucher Amount	Voucher Number	Allowance Amount	Comments
↔	28/10/24	14:49:16	Amy Stephe...	Action							

14 Double click "No action"

AA2	Assembly Advice
BD	Book Delivery or Collection
CBR	Call Back Required
CCD	Customer Cancelled Delivery
CN14	Cancellation - Full
CN15	Cancellation - Part
CN16	Goodwill
CN17	Cancellation - Services
CTYG	Claim TYG
LR	Correspondence - Letters
DC	Dreams Cancelled Delivery
DS	Awaiting Driver Statement
EA	Exchange
FINCR	Finance Cost Reduction
NA	No Action
OA	Order Amendment
PD	Progress Delivery or Collection
PR	Progress Refund
PT	Parts
RD	Re-book Delivery or Collection
RI	Repair / Inspection
RS	Reselection
VAT	Process VAT Refund
C@RS	Customers at Risk
PA	Resolve Assembly
ST-OA	Store Use Only - Order Amendment
ST-RS	Store Use Only - Reselection
ST-CN1	Store Use Only - Cancellation after 24 hours

15 Click the purple box in the "Task column"

Issue	Log Reason	Fault	Info Code 1	Info 1	Info Code 2	Info 2	Reason for Parts	Part Req
Defective Mattress	Defective Mattress	Not Applicable / No Fault	016-00635	Hopkins SK Ottoman Oatmeal Box 1(Head&Foot End)	V03636	KAYDIAN	Others (...)	
Defective Bedstead/Kids Beds	Defective Bedstead/Kids Beds	Not Applicable / No Fault	016-00635	Hopkins SK Ottoman Oatmeal Box 1(Head&Foot End)	V03636	KAYDIAN	Others (...)	

Record On	Logged At	Logged By	Contact Call	Action	Task	Activity Reason	Voucher Amount	Voucher Number	Allowance Amount
0/24	14:49:16	Amy Stephe...	Action	NA	↑				

16 Double click the "Information only" line

Dreams LIVE - Microsoft Dynamics NAV Classic - [Action/Task List]

File Edit View Tools Window Help

Action Code	Code	Description	Sequence No.	Status	Within Days	Require Letter	Require Authorisation	CSI	Task Type
NA									
▶ NA	CD	Information only - Close log	1	Closed	1	✓			Order
NA	IO	Information only - Log open	2			✓			Order
NA	HRTS	Helpdesk - refer to store	3	Closed	1				Order
NA	SYSTSK	System Closed	999	Closed					Order

17 Double click your product

Dreams LIVE - Microsoft Dynamics NAV Classic - [Action/Reason List]

File Edit View Tools Window Help

Action Code	Code	Description
NA		25 Customer has changed mind
NA		11 Damaged Goods
NA		40 Defective Adjustables
NA		36 Defective Bedstead/Kids Bed
NA		35 Defective Divan
NA		38 Defective Furniture
NA		41 Defective Headboard
▶ NA		34 Defective Mattress
NA		39 Defective Sofa Bed
NA		37 Defective Softs
NA		42 Defective TV Bed
NA		27 Discontinued goods
NA		33 Escalated to Service Excellence
NA		03 Failed Delivery/Collection
NA		12 Faulty Goods
NA		45 Finance Query
NA		29 General Finance
NA		9 Good Service
NA		4 Incomplete or Part Delivery
NA		7 Incorrect Goods Delivered
NA		26 Late delivery

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Click the yellow box in the "Comments" column then press "Enter" to leave your note. Use the ESC key to go back to the homepage of the system.

Info 1	Info Code 2	Info 2	Reason for Parts	Parts Required	Comments
Jopkins SK Ottoman Jatmeal Box 1(Head&Foot End)	V03636	KAYDIAN	Others (...)	0	
Jopkins SK Ottoman Jatmeal Box 1(Head&Foot End)	V03636	KAYDIAN	Others (...)	0	

	Activity Reason	Voucher Amount	Voucher Number	Allowance Amount	Comments
Close	Defective Bedstead/Ki...				