



MB&G INSURANCE

Dreams System

How To Search For A Policy

01.11.24

Dreams System Process: How to Search for a Policy

- 1 Click the box that contains the Dreams order number.

Dreams LIVE - Microsoft Dynamics NAV Classic - [224A012573 Mrs SULTAN YAPICI - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping **Payments** Communication Customer Service

No. 224A012573

Sell-to Customer No. . . . B224

Sell-to Contact No. . . . B224-CT012986

Sell-to Customer Name . . .

Sell-to Address

Sell-to Address 2

Sell-to City Enfield

Sell-to County/Post Code Middlesex

Sell-to Contact

Related Back To Back . . . 0

Customer Collection . . . Staff Sales Order
Sleepmatch

Order Amount. 2,005.00

Payments 2,005.00

Financed Amount 0.00

BALANCE 0.00

Intake Value. 2,005.00

Status Released

Order Status. Delivered

Order Date 16/07/19

Delivery Date 01/10/19

Daytime : 07:00:00 - 18:00:00

Times Delivery Date Changed . . 0

Salesperson Code . . . AL37

Location Code. HDD-SY

Interaction Count 0

Archived Versions 2

TBA Comments 0

Overall Special . . .

Telesales Order

	A1	Collection	Auto	Warranty	Route	Postcode	Description
Reallocation	Branch	Stock	Pay a...	Item No.	No.		
0							251-00274 Sleepmotion 9C
0					EN	EN3 6DU	Store Discretionary upto 5
0					EN	EN3 6DU	Sleepmotion 900i D Light G
0					EN	EN3 6DU	Sleepmotion 900i D Light G

2 Click the magnifying glass

Dreams LIVE - Microsoft Dynamics NAV Classic - [224A012573 Mrs SULTAN YAPICI - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication Customer Service

No. 224A012573

Order Amount. 2,005.00

Order Date 16/07/19

Sell-to Customer No. . . . B224

Payments 2,005.00

Delivery Date 01/10/19

Sell-to Contact No. . . . B224-CT012986

Financed Amount 0.00

Daytime : 07:00:00 - 18:00:00

Sell-to Customer Name

BALANCE 0.00

Times Delivery Date Changed 0

Sell-to Address

Make Payment

Salesperson Code AL37

Sell-to Address 2

Allowances

Location Code. HDD-SY

Sell-to City Enfield

Interaction Count 0

Sell-to County/Post Code Middlesex

Archived Versions 2

Sell-to Contact

Intake Value. 2,005.00

TBA Comments 0

Related Back To Back 0

Status Released

Overall Special

Customer Collection Staff Sales Order

Order Status. Delivered

Telesales Order

Sleepmatch

A1	Reallocation	Branch Stock Location	Auto Pay	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0									251-00274 Sleepmotion 9C
0							EN	EN3 6DU	Store Discretionary upto 5
0							EN	EN3 6DU	Sleepmotion 900i D Light G
0							EN	EN3 6DU	Sleepmotion 900i D Light G

3 Paste the order number into the box and press 'Enter'

Dreams LIVE - Microsoft Dynamics NAV Classic - [322A007614 Mrs ALISON MANSFIELD - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication Customer Service

No. 322A007614

Order Amount. 1,301.99

Order Date 22/09/19

Sell-to Customer No. . . . B322

Payments 0.00

Delivery Date 06/11/19

Sell-to Contact No. . . . B322-CT005441

Financed Amount 1,301.99

Daytime : 07:00:00 - 18:00:00

Sell-to Customer Name

BALANCE 0.00

Times Delivery Date Changed 0

Sell-to Address

Make Payment

Salesperson Code HUJ2

Sell-to Address 2 Kimmel Bay

Allowances

Location Code. HDD-WA

Sell-to City Rhyl

Interaction Count 1

Sell-to County/Post Code Clwyd

Archived Versions 3

Sell-to Contact

Intake Value. 1,301.99

TBA Comments 0

Related Back To Back 0

Status Released

Overall Special

Customer Collection Staff Sales Order

Order Status. Delivered

Telesales Order

Sleepmatch

A1	Reallocation	Branch Stock Location	Auto Pay	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description	Quantity	Rtn Qty	Unit of Measure	Unit Price	Line Amount	Line Ind. VAT	Line Disc.	Order Date
0							LL	LL18 53Q	256-00175 Hopkins SK Ottoman Fabric Oatmeal	1	1.00	EACH	229.10	229.10			22/09/19
0							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box1(Head/Foot End)	1	1.00	EACH	204.45	204.45			22/09/19
0							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box2(Srat,CR,CY,MSupp	1	1.00	EACH	237.32	237.32			22/09/19
0							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box3(Top Base)	1	1.00	EACH	81.20	81.20			22/09/19
0							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box4(Bottom Base)	1	1.00	EACH	146.93	146.93			22/09/19
0							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box5(Mechanism)	1	1.00	EACH	85.00	85.00			22/09/19
0				220919_102713BED HJ18	256-00175		LL	LL18 53Q	Bed Cover Primary Item	1	1.00	EACH	-80.01	-80.01			22/09/19
0							LL	LL18 53Q	Store Discretionary 5.0% - 10%	1	1.00	EACH	50.00	50.00			22/09/19
0							LL	LL18 53Q	Assembly - Ottoman Bedframe D,K,SK (Inc Driv)	1	1.00	EACH	199.00	199.00			22/09/19
0							LL	LL18 53Q	Deacon Storage Box Natural Fabric	1	1.00	EACH	-59.66	-59.66			22/09/19
0							LL	LL18 53Q	Furniture Range 3 for 2	2	2.00	EACH	146.00	292.00			22/09/19
0							LL	LL18 53Q	Kimberley Bedside Oatmeal	1	1.00	EACH	-89.34	-89.34			22/09/19
0							LL	LL18 53Q	Furniture Range 3 for 2	1	1.00	EACH					22/09/19
0							LL	LL18 53Q	Free Del Over £100 Mon-Fri (Chargeable Weekends)	1	1.00	EACH					22/09/19

Find What 322A007614

Match Whole Field

Beginning of Field

Any Part of Field

Match Case

Use the Best Key

Find As You Type

Find WH

Delivery Status: Waiting

Comments Contact/Actions Log Order Line Functions Print

Pst'd Del. Schedul...

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

4 The customer's details can be found on the general tab

Dreams LIVE - Microsoft Dynamics NAV Classic - [322A007614 Mrs ALISON MANSFIELD - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication Customer Service

No. 322A007614

Order Amount. **1,301.99**

Order Date 22/09/19

Sell-to Customer No. . . . B322

Payments 0.00

Delivery Date 06/11/19

Sell-to Contact No. . . . B322-CT005441

Financed Amount 1,301.99

Daytime : 07:00:00 - 18:00:00

Sell-to Customer Name

BALANCE **0.00**

Times Delivery Date Changed 0

Sell-to Address

Intake Value. **1,301.99**

Salesperson Code MUJ02

Sell-to Address 2 Kinnel Bay

Make Payment

Location Code. HDD-WA

Sell-to City Rhyl

Allowances

Interaction Count 1

Sell-to County/Post Code Clwyd

Archived Versions 3

Sell-to Contact

Status Released

TBA Comments 0

Related Back To Back 0

Order Status. **Delivered**

Overall Special

Customer Collection **Staff Sales Order**

Sleepmatch

Reallocation	Branch	Stock Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0							LL	LL 18 5JQ	Hopkins SK Ottoman Oatm
0							LL	LL 18 5JQ	Hopkins SK Ottoman Oatm
0							LL	LL 18 5JQ	Hopkins SK Ottoman Oatm

5 If you need to access the customer's contact details, go to the communication tab

Dreams LIVE - Microsoft Dynamics NAV Classic - [322A007614 Mrs ALISON MANSFIELD - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments **Communication** Customer Service

Telephone (Work)

Telephone (Mobile)

Telephone (Home)

Cust. Email

Quote No.

Cust Not Present

Customer Customer 0844 HDH

Call Manager (Office) 0 0 0

Call Manager (Mobile) 0 0 0

Call Manager (Home) 0 0 0

Total Calls 0 0 0

Exported to SMG (Order) GDPR Status Unverified

DSAR Number

Exported to SMG (Del.) GDPR Entry

Reallocation	Branch	Stock Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0							LL	LL 18 5JQ	Hopkins SK Ottoman Oatm
0							LL	LL 18 5JQ	Hopkins SK Ottoman Oatm
0							LL	LL 18 5JQ	Hopkins SK Ottoman Oatm

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If you do not have an order number, you can search for your customer using their postcode.

Allocation	Branch Stock	Location	Auto Pay	Warranty Description	Item No.	MTM	Route No.	Postcode	Description
									256-00175 Hopkins SK Ott
							LL	LL18 5JQ	Hopkins SK Ottoman Oatm
							LL	LL18 5JQ	Hopkins SK Ottoman Oatm
							LL	LL18 5JQ	Hopkins SK Ottoman Oatm
							LL	LL18 5JQ	Hopkins SK Ottoman Oatm

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Paste the post code into the search box and press 'Enter'

Allocation	Branch Stock	Location	Auto Pay	Warranty Description	Item No.	MTM	Route No.	Postcode	Description	Quantity	Rtn Qty	Unit of Measure	Unit Price	Line Amount	Line Disc.
							LL	LL18 5JQ	256-00175 Hopkins SK Ottoman Fabric Oatmeal		0.00				
							LL	LL18 5JQ	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	1	1.00	EACH	229.10	229.10	
							LL	LL18 5JQ	Hopkins SK Ottoman Oatmeal Box2(SRail,CR,Cyl,MSupp	1	1.00	EACH	204.45	204.45	
							LL	LL18 5JQ	Hopkins SK Ottoman Oatmeal Box3(Top Base)	1	1.00	EACH	237.32	237.32	
							LL	LL18 5JQ	Hopkins SK Ottoman Oatmeal Box4(Bottom Base)	1	1.00	EACH	81.20	81.20	
							LL	LL18 5JQ	Hopkins SK Ottoman Oatmeal Box5(Mechanism)	1	1.00	EACH	146.93	146.93	
							LL	LL18 5JQ	Bed Cover Primary Item	1	1.00	EACH	85.00	85.00	
							LL	LL18 5JQ	Store Discretionary 5.0% - 10%	1	1.00	EACH	-80.01	-80.01	
							LL	LL18 5JQ	Assembly - Ottoman Bedframe D,K,SK (Inc Driv)	1	1.00	EACH	50.00	50.00	
							LL	LL18 5JQ	Deacon Storage Box Natural Fabric	1	1.00	EACH	199.00	199.00	
							LL	LL18 5JQ	Furniture Range 3 for 2	1	1.00	EACH	-59.66	-59.66	
							LL	LL18 5JQ	Kimberley Bedside Oatmeal	2	2.00	EACH	149.00	298.00	
							LL	LL18 5JQ	Furniture Range 3 for 2	1	1.00	EACH	-89.34	-89.34	
							LL	LL18 5JQ	Free Del Over£100 Mon-Fri (Chargeable Weekends)	1	1.00	EACH			

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Click 'Find next' until you find the customer you are looking for.

A1	Reallocation	Branch Stock	Collection Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0										256-00175 Hopkins SK Ottoman Fat
0								LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box1
0								LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box2
0								LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box3
0								LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box4
0								LL	LL 18 5JQ	Hopkins SK Ottoman Oatmeal Box5
0					220919_102713 BED HI	8		LL	LL 18 5JQ	Bed Cover Primary Item
0						256-00175		LL	LL 18 5JQ	Store Discretionary 5.0% - 10%
0								LL	LL 18 5JQ	Assembly - Ottoman Bedframe D,K,
0								LL	LL 18 5JQ	Deacon Storage Box Natural Fabric
0								LL	LL 18 5JQ	Furniture Range 3 for 2
0								LL	LL 18 5JQ	Kimberley Bedside Oatmeal
0								LL	LL 18 5JQ	Furniture Range 3 for 2
0								LL	LL 18 5JQ	Free Del Over £100 Mon-Fri (Charge

Sell-to Post Code - Find

Find What: LL 18 5JQ

Match: Whole Field
 Beginning of Field
 Any Part of Field

Match Case:

Use the Best Key:

Find As You Type:

Buttons: Find First, Find Next, Find Previous, Go Back, Close, Replace..., Help

Delivery Status: Waiting

YCS