



MB&G INSURANCE

Dreams

Desktop Assessment – Ordering Parts

31.10.24

Desktop Assessment - Ordering Parts

1 There are several email addresses to order parts from when actioning DTAs.

supplierinspections@dreams.co.uk - This email address is used for the majority of Dreams beds when ordering small parts. Small parts include individual slats, pistons, scissor arms and castors.


TYGReplace@dreams.co.uk - This email address is used for any large parts, including drawers from divans, full slat systems or full boxes.

customer.services@kaydian.co.uk - This email address is only used for ordering small parts for Kaydian beds. You can check if the product is a Kaydian bed under the 'manufacturer' box on the front page of the policy.

admin@mibed.co.uk - This email address is used when ordering anything for Furmanac products.

Click the documents icon to access your claim.

The screenshot displays a software interface for managing claims. On the left, a vertical list of claims is shown, with the text 'as Been Raised For Assessment' repeated. The right side shows a detailed view of a claim with the following information:

- DETAILS** | NOTES | DOCUMENTS | HISTORY
- Detail**
- A New DTA Dreams Claim Has Been Raised For Assessment
- Claim**  447569
- Type**: Automated Task
- Status**: (empty)
- Is High Priority?**: No
- Due Date**: 29/10/2024 09:43
- Opened By**: Stuart Horne
- Opened Date**: 29/10/2024 09:43
- Commenced By**: (empty)
- Commenced Date**: (empty)

2 Click "Close"

The screenshot shows a web form for editing a claim. At the top, there are several input fields: "FNOL Reference" with value "FNOL037519", "Notification Date" with value "24/10/2024", "Incident Date" with value "21/10/2024", "Order Date", "Delivery Date" with value "20/05/2022", "Position" with value "Referred", "Reason" with value "Assigned for Desktop", and "Handler" with value "Stuart Horne". A modal form is open in the foreground with a red "CLOSE" button highlighted by an orange circle. The modal form contains a date field "24/10/2024 14:15", an "Author" field with value "Service Process", and a text area with the following text: "Is there anything else you wish to tell us about your claim?:", "Do you agree with the above declaration?: Yes", and "Declaration Date: 24/10/2024".

3 Copy your order number

The screenshot shows a web browser window with the URL "mbandg.evoclaim.com/Task/Index". The browser's address bar and tabs are visible. The main content is a form titled "Edit Claim" with a sub-section "Claim". The form contains several fields: "Policy Holder" with a copy icon, "External Ref No" with value "378A002181/1" and an orange circle highlighting the copy icon, "Cover Level" with value "Dream Cover Structure Beds 2nd to 8th year warranty", "Underwriter" with value "Novus Underwriting", and "Vulnerable?" with a dropdown menu set to "No". To the right, there are summary fields: "Claim Reference" with value "447569", "FNOL Reference" with value "FN", "Notification Date" with value "24/10/2024", and "Order Date". Below the form is a navigation bar with tabs: "DETAILS", "PARTIES", "ESTIMATES", "ESTIMATE PARTS", "ESTIMATE LABOUR", "PAYMENTS", "NOTES", "TASKS", and "DOCUMENTS". The "DETAILS" tab is selected, showing "Fault Category" with value "Bed" and "Fault Type" with value "Accidental Damage". To the right of these fields are "Repair" and "Action" fields with values "DTA Pro".

4 Perform your normal validation checks on the Dreams system

Dreams LIVE - Microsoft Dynamics NAV Classic - [327A011331 Mr A CHANA - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping **Payments** Communication Customer Service

No. 327A011331

Sell-to Customer No. . . B327

Sell-to Contact No. . . . B327-CT009371

Sell-to Customer Name

Sell-to Address

Sell-to Address 2

Sell-to City Bilston

Sell-to County/Post Code West Midlands

Sell-to Contact

Related Back To Back ... 0

Customer Collection . . . **Staff Sales Order**
Sleepmatch

Order Amount. **844.20**

Payments 100.00

Financed Amount 674.20

BALANCE 70.00

Intake Value. **844.20**

Status Released

Order Status. . . **Delivered**

Order Date 23/02/21

Delivery Date

Times Delivery Date Changed . 0

Salesperson Code . . . KL23

Location Code. HDD-WD

Interaction Count 2

Archived Versions 1

TBA Comments 0

Overall Special . . .

Telesales Order

DEL UPI	Back to Back Sle...	Back To Back P.O. Req...	Back To Back Orde...	Back To Back Line ...	A1 Reallocation	Collection Branch	Stock Location ...	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.
	<input checked="" type="checkbox"/>		Y21-STK...	10000								WV
				0								WV
				0								WV
				0								WV

5 Go to cover level

Login | Five9 EvoSuite - Login Dreams Service Power Homeserve Job Syst... Bright HR PowerBI Vulne

MR&G

Edit Claim

Claim

Policy Holder

External Ref No 378A002181/1

Cover Level

Underwriter Novus Underwriting

Vulnerable? No

Claim Reference 447569

FNOL Reference

Notification Date 24/10/21

Order Date

DETAILS PARTIES ESTIMATES ESTIMATE PARTS ESTIMATE LABOUR PAYMENTS NOTES TASKS DOCUMENTS

Fault Category Bed

Fault Type Accidental Damage

Fault Detail Slats / Slat Caps

Repair

Action DTA Pro

Fraud Check Complete No

6 Double check that the claim has been raised on the correct item

CS CLAIMS HISTORY RELATED POLICIES

Product Category	Bed	Retail V
Product Type		Repair Ex
Product Size	4'6 Double	D
Vendor Ref	V03637	C
Manufacturer	AN Seng Enterprise	Sales Information
Model	WESTBROOK D BLACK METAL (SOLID SLATS) V2	Seller Br:
Vulnerable?	No	Sales A
Delivery Address		Policy
Different Delivery Address?	No	Previous P
		Lead So

7 Click "close"

Browser window showing a form with a "CLOSE" button highlighted.

Policy Date	19/05/2030	Policy Status	Active
		Policy Liability	RV
		Claim Liability	RV
		Claims Incurred	GBP 84.00 1

8 Check the fault type

External Ref No	378A002181/1	FNOL Reference	FN
Cover Level	Dream Cover Structure Beds 2nd to 8th year warranty	Notification Date	24/10/2024
Underwriter	Novus Underwriting	Order Date	
Vulnerable?	No		

DETAILS	PARTIES	ESTIMATES	ESTIMATE PARTS	ESTIMATE LABOUR	PAYMENTS	NOTES	TASKS	DOCUMENTS
Fault Category	Bed	Repair						
Fault Type	Accidental Damage	Action						DTA Pro
Fault Detail	Slats / Slat Caps	Fraud Check Complete						No
Fault Description	Date Fault Noticed: 21/10/2024 Fault Description: Broken wooden slats	Specific Requests / Directions						
Cause								
Cause Description								

9 Check the delivery date to ensure the claim is valid.

Accidental damage is covered for the first 5 years

Manufacturing defects are covered after the first 12 months

Claim Reference	447569	Status	Open
FNOL Reference	FNOL037519	Position	Referred
Notification Date	24/10/2024	Reason	Assigned for Desktop Ass
Order Date		Handler	Stuart Horne
Incident Date	21/10/2024	Next Appointment Date	
Delivery Date	20/05/2022		

ES	TASKS	DOCUMENTS	HISTORY	API
Repair		Claim Value		
Action	DTA Process	Maximum Liability	RV	
Fraud Check Complete	No	Claims Incurred	£ 84.00	
Specific Requests / Directions		Repair Excess	£ 0.	

10 Match the "Cause" to your "Fault type"

DETAILS	PARTIES	ESTIMATES	ESTIMATE PARTS	ESTIMATE LABOUR	PAYMENTS	NOTES	TASKS	DOCUMENT
Fault Category	Bed						Repair	
Fault Type	Accidental Damage						Action	DTA Pro
Fault Detail	Slats / Slat Caps						Fraud Check Complete	No
Fault Description	Date Fault Noticed: 21/10/2024 Fault Description: Broken wooden slats						Specific Requests / Directions	
Cause	Accidental Damage							
Cause Description								
Emmiera Instruction Code	AD1 Accidental Damage							

11 Copy the fault description and paste it into the cause description field

Fault Detail	Slats / Slat Caps						Fraud Check Complete	No
Fault Description	Date Fault Noticed: 21/10/2024 Fault Description: Broken wooden slats						Specific Requests / Directions	
Cause	Accidental Damage							
Cause Description	Date Fault Noticed: 21/10/2024 Fault Description: Broken wooden slats							
Emmiera Instruction Code	AD1 Accidental Damage							
Emmiera Instruction	AD1: Accident Damage is covered.							

12 Set the repair as "Furniture repair"

Sutherland	Claim Reference	447509		
	FNOL Reference	FNOL037519		
Structure Beds 2nd to 8th year warranty	Notification Date	24/10/2024	Incident Date	21/10/2024
rg	Order Date		Delivery Date	20/05/2022

ESTIMATE PARTS ESTIMATE LABOUR PAYMENTS NOTES TASKS DOCUMENTS HISTORY API

	Repair	Furniture Repair
	Action	DTA Process
	Fraud Check Complete	No
	Specific Requests / Directions	

13 Click here

Amy Stephenson

SAVE SAVE AND CLOSE CLOSE PRINT EMAIL

Status	Open
Position	Referred
Reason	Accepted
Handler	Referred
Next Appointment Date	Rejected
	Reopened

Maximum Liability	RV	Claim Value	Unlimited
Claims Incurred	£ 84.00	Claim #	1
Repair Excess	£ 0.00		

14 Set the claim position as "Accepted"

time - Formstack Daily Claim Review -... Issues & Breaches -... Peer Review Checkli... TSG >> | All Boo

Amy Stephenson ▾

SAVE SAVE AND CLOSE CLOSE PRINT EMAIL

<input type="text"/>	Status	Open ▾
<input type="text"/>	Position	Accepted ▾
Report Date <input type="text" value="21/10/2024"/>	Reason	<input type="text"/>
Expiry Date <input type="text" value="20/05/2022"/>	Handler	Stuart Horne ▾
	Next Appointment Date	<input type="text"/>

<input type="text"/>	Claim Value	Claim #
<input type="text"/>	Maximum Liability <input type="text" value="RV"/>	<input type="text" value="Unlimited"/>
<input type="text"/>	Claims Incurred £ <input type="text" value="84.00"/>	<input type="text" value="1"/>

15 The claim reason you select depends on where the parts have been ordered from:

If parts have been ordered from TYG, select "Parts Requested from Dreams" - this will send the customer an email to let them know that Dreams will contact them to arrange the repair through them.

If parts are being ordered from any of the other suppliers, choose "Parts Requested to Customer Small Claim" - this sends an email to the customer which advises them to contact us to arrange a repair if they need help fitting their parts.

The screenshot shows a web-based claim management interface. On the left, there are input fields for 'Date' (21/10/2024) and 'Date' (20/05/2022). The main area contains a form with several sections: 'Position' (Accepted), 'Reason' (dropdown menu), 'Handler' (Accepted), and 'Next Appointment Date'. The 'Reason' dropdown menu is open, showing options: Accepted, Claim Taken in Error - Referred to Retailer, Complaint - Rejection Overturned, Complaint Resolved, Finalised, Parts Requested from Dreams (highlighted with an orange circle), Parts Requested to Customer Small Claim, Repair Authorised, Repair Complete, and Replacement Requested. Below these sections are financial fields: 'Maximum Liability', 'Claims Incurred', 'Repair Excess' (with an info icon), 'Claim Fee', 'Current Reserve' (£ 84.00), 'Total Paid' (£ 0.00), and 'Grand Total' (£ 84.00).

16

Search the name of the bed in the parts availability spreadsheet to confirm if the product is still available to order.

If the bed has been discontinued, it will need to be replaced.

	No parts	Full replacement	
	no parts	full replacement	
	no parts	full replacement	
rtas	no parts	full replacement	
	no parts	full replacement	
	No parts	Full replacement	
		Full replacement	
ailable, need to			
ontrol box available			
ats available from			
	Discontinued		
	Discontinued		
port legs ONLY			
	Scissor arms not available has spare		
	order box 3 from TYG. Light fixtures		
	not available as spares, order head		

Find and Replace

Find Replace

Find what: westbrook

Options >>

Find All Find Next Close

17

Go to estimates

Claim

Policy Holder	[Redacted]	Claim Reference	447569
External Ref No	378A002181/1	FNOL Reference	FN
Cover Level	Dream Cover Structure Beds 2nd to 8th year warranty	Notification Date	24/10/2024
Underwriter	Novus Underwriting	Order Date	
Vulnerable?	No		

DETAILS PARTIES **ESTIMATES** ESTIMATE PARTS ESTIMATE LABOUR PAYMENTS NOTES TASKS DOCUMENTS

Fault Category	Bed	Repair	Furniture
Fault Type	Accidental Damage	Action	DTA Pro
Fault Detail	Slats / Slat Caps	Fraud Check Complete	No
Fault Description	Date Fault Noticed: 21/10/2024 Fault Description: Broken wooden slats	Specific Requests / Directions	

18

If you are ordering parts from TYG (or replacing the bed) then you need to delete the Emmiera estimate.

If you are ordering parts from another supplier, leave the Emmiera estimate on there in case the customer requires an appointment.

DOCUMENTS HISTORY API

+ ADD DELETE X

ESTIMATE NO.	JOB NUMBER	DESCRIPTION	ESTIMATE	PAID	OUTSTANDING
202302	447569	Triage/Intel	£ 36.00	£ 0.00	£
202303	447569	First Inspection	£ 48.00	£ 0.00	£

19

If you need to delete the estimate, click on it then press "delete"

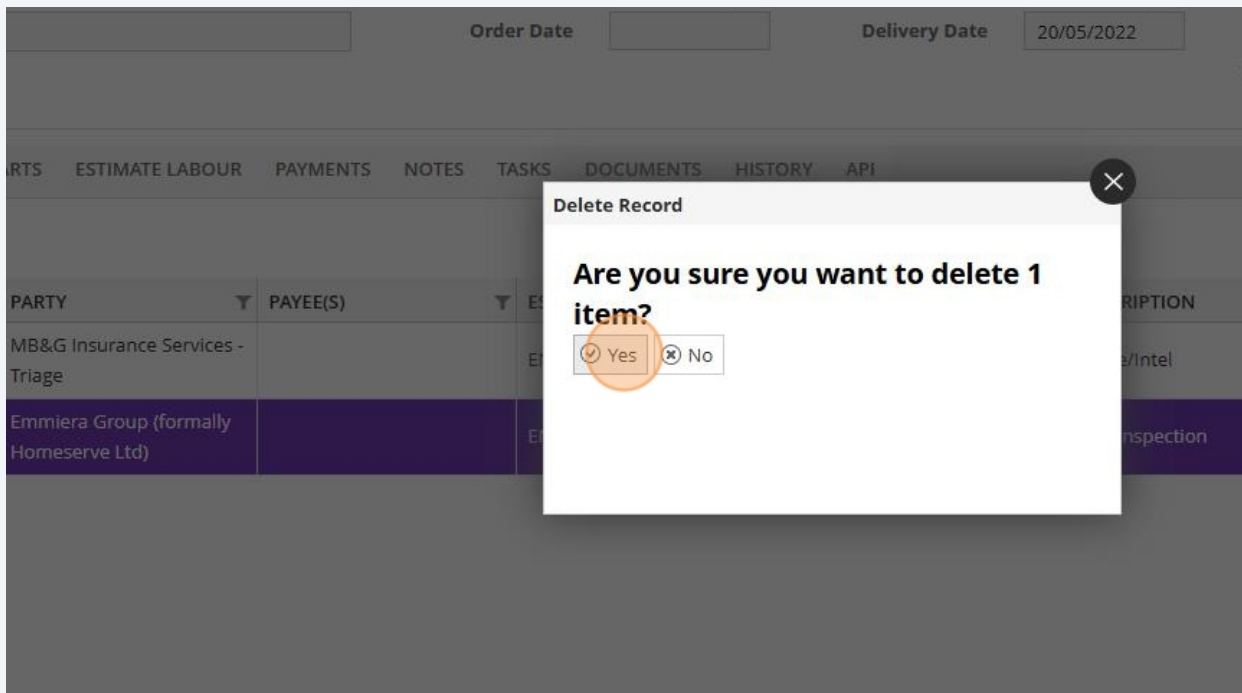
Status: Open
Position: Accepted
Reason: Parts Requested from Dreams
Handler: Stuart Horne
Next Appointment Date:

21/10/2024
20/05/2022

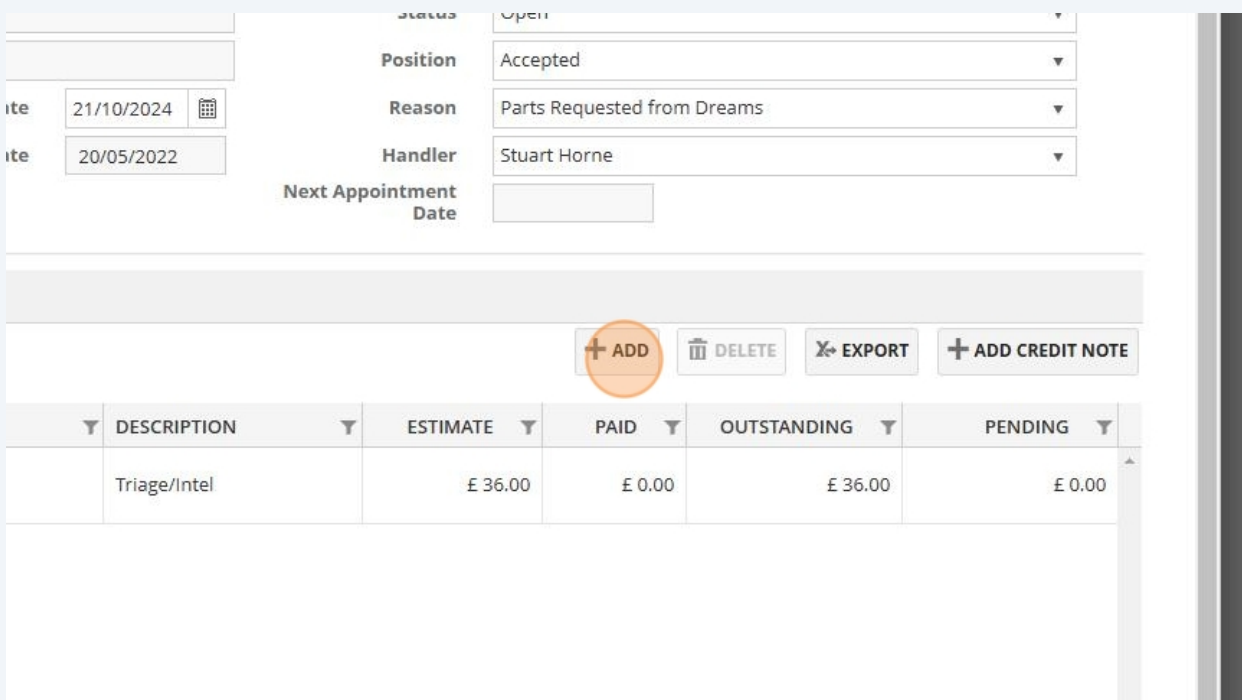
+ ADD DELETE X EXPORT + ADD CREDIT NOTE

DESCRIPTION	ESTIMATE	PAID	OUTSTANDING	PENDING
Triage/Intel	£ 36.00	£ 0.00	£ 36.00	£ 0.00
First Inspection	£ 48.00	£ 0.00	£ 48.00	£ 0.00

20 Click "Yes"



21 Now you need to add an estimate for your parts. Click "Add"



22 Choose "Dreams" as the estimate type

The screenshot shows a web form titled "Add Claim Estimate" with a sub-section "New Estimate". Under the "DETAILS" tab, there is a dropdown menu for "Type" with "Dreams Default" selected and highlighted in purple. Other fields include "Party", "Description" (MB&G Payment Correction), "Job Number" (Triage Fee), and "Estimate Number". Below this is a "Financial Breakdown" section with a table:

	Estimate			
	Net	Vat	Gross	
Sub Total	£ 0.00	£ 0.00	£ 0.00	£

23 Click the magnifying glass

The screenshot shows a search interface with a magnifying glass icon highlighted in an orange circle. At the top right, there are buttons for "ADD", "ADD AND CLOSE", and "CLOSE". Below the search bar, there is a list of items, with the first item highlighted. At the bottom, there is a "Paid" section with a value of "£ 0.00".

24 Double-click the supplier you are ordering parts from

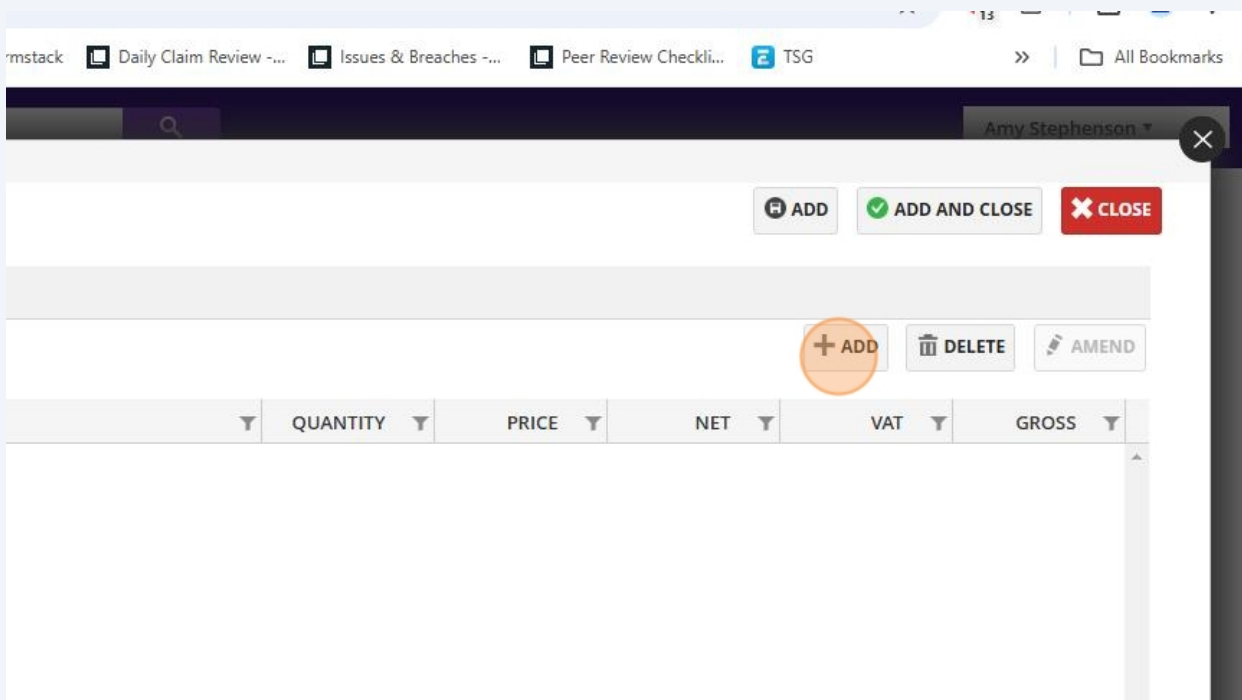
The screenshot shows a software interface with a 'Select Party' dialog box. The dialog lists several suppliers, with 'Dreams' highlighted in orange. The background shows a form with fields for Type, Party, Description, Job Number, and Estimate Number, and a Financial Breakdown table.

	Net	Vat
Parts	£ 0.00	£ 0.00
Labour	£ 0.00	£ 0.00
Sub Total	£ 0.00	£ 0.00
Pair Excess	£ 0.00	£ 0.00

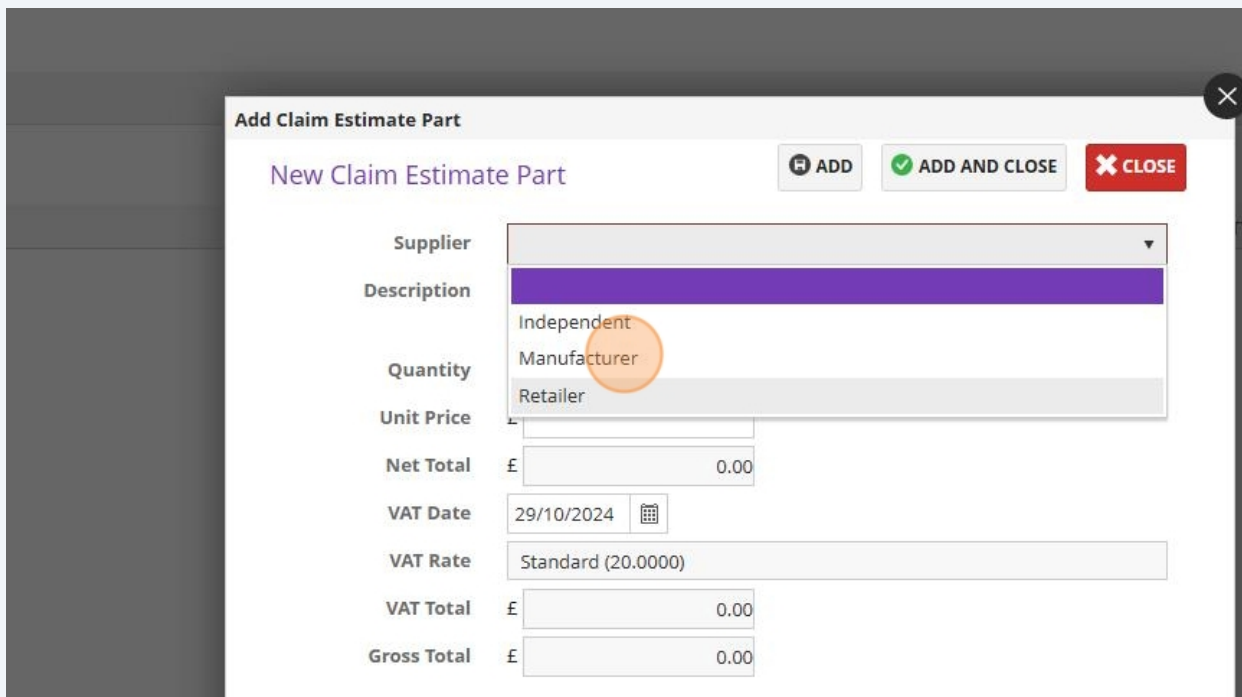
25 Type "DRE" in both the description and job number fields then click "Parts"

The screenshot shows a web browser displaying the 'Add Claim Estimate' form. The 'PARTS' tab is selected, and the 'Description' and 'Job Number' fields contain 'DRE'. The 'Party' field is set to 'Dreams'. The 'Estimate Number' field is empty, and a dropdown menu is open below it showing 'DRE' and 'dre'.

26 Click "ADD"



27 Set the supplier as "manufacturer"



28 Type the name of the parts into the description field and enter the unit price.

Click "Add and close"

The screenshot shows a dialog box titled "Add Claim Estimate Part" with a close button (X) in the top right corner. The dialog contains the following fields and values:

Field	Value
Supplier	Manufacturer
Description	solid slat system
Quantity	1
Unit Price	£ 31.31
Net Total	£ 31.31
VAT Date	29/10/2024
VAT Rate	Standard (20.0000)
VAT Total	£ 6.26

The "ADD AND CLOSE" button is highlighted with an orange circle.

29

Estimate costs:

TYG - The estimate price will be the cost of the box on the Dreams system

Supplier Inspections - The estimate cost is £4.99

Any other supplier - £50

Qty	MTM	Route No.	Postcode	Description	Quantity	Rtn Qty	Unit of Measure ...	Unit Price Incl. VAT	Line Amount Incl. VAT	Line Disco...	Order Date
				211-01117 Westbrook D B...		0.00					
		CR	CR4 1EG	Westbrook D Black Metal ...	1	1.00	EACH	81.08	81.08		26/04/22
		CR	CR4 1EG	Westbrook D Black Metal ...	1	1.00	EACH	36.61	36.61		26/04/22
		CR	CR4 1EG	Dreams D Wood Slats (Solid)	1	1.00	EACH	31.31	31.31		26/04/22
117		CR	CR4 1EG	Bed Cover Primary Item	1	1.00	EACH	25.00	25.00		26/04/22
		CR	CR4 1EG	Assembly - Bedframe D,K,...	1	1.00	EACH	55.00	55.00		26/04/22
		CR	CR4 1EG	Superspring Silentnight Pa...	1	1.00	EACH	40.00	40.00		26/04/22
		CR	CR4 1EG	50% off Silentnight Beddi...	1	1.00	EACH	-20.00	-20.00		26/04/22
		CR	CR4 1EG	Free Del Over £100 Mon-...	1	1.00	EACH				26/04/22

30 Click "Notes"

Mrs Yvonne Sutherland	Claim Reference ⓘ	447569		
002181/1	FNOL Reference	FNOL037519		
Dream Cover Structure Beds 2nd to 8th year warranty	Notification Date	24/10/2024	Incident Date	21/
s Underwriting	Order Date		Delivery Date	20

▼

NOTES ESTIMATE PARTS ESTIMATE LABOUR PAYMENTS **NOTES** TASKS DOCUMENTS HISTORY API

▼	PARTY	▼	PAYEE(S)	▼	ESTIMATE NO.	▼	JOB NUMBER	▼
	MB&G Insurance Services - Triage				EN202302		447569	
fault	Dreams				EN202497		DRE	

31 Click "Add"

	Status	Open
	Position	Accepted
21/10/2024	Reason	Parts Requested from Dreams
20/05/2022	Handler	Stuart Horne
	Next Appointment Date	

+ ADD DELETE

NOTE ▼

32 Type your note and click "Add and close"

Add Claim Note

New Claim Note

ADD ADD AND CLOSE CLOSE

Date: 29/10/2024

Author: Amy Stephenson

Claim Note Type: [dropdown]

DTA - Solid slat system ordered from TYD

33 Go to tasks

ie Sutherland

Claim Reference 447569

FNOL Reference FNOL037519

Notification Date 24/10/2024 Incident Date 21/10/2024

Order Date Delivery Date 20/05/2022

ESTIMATE PARTS ESTIMATE LABOUR PAYMENTS **TASKS** DOCUMENTS HISTORY API

CREATED	AUTHOR	TYPE	NOTE
24/10/2024 14:15	Service Process		Is there anything else 24/10/2024
29/10/2024 15:08	Amy Stephenson		DTA - Solid slat system

34 Tick the box on the task

Order Date Delivery Date 20/05/2022 Handler
Next Appointment Date


UR PAYMENTS NOTES **TASKS** DOCUMENTS HISTORY API

	▼ DUE DATE	▼ COMPLETED?	▼ TYPE
	29/10/2024 09:43	<input type="checkbox"/>	Automated Task

35 Go to documents

Claim Reference ⓘ 447569
 FNOL Reference FNOL037519
Beds 2nd to 8th year warranty Notification Date 24/10/2024 Incident Date 21/10/2024
Order Date Delivery Date 20/05/2022

TS ESTIMATE LABOUR PAYMENTS NOTES **TASKS** **DOCUMENTS** HISTORY API

 Saving...

	▼ DUE DATE	▼ COMPLETED?	▼ TYPE
ment	29/10/2024 09:43		Automated Task

36 Go to "Email/forward"

Status Open

Position Accepted

Reason Parts Requested from Dreams

Handler Stuart Horne

Next Appointment Date

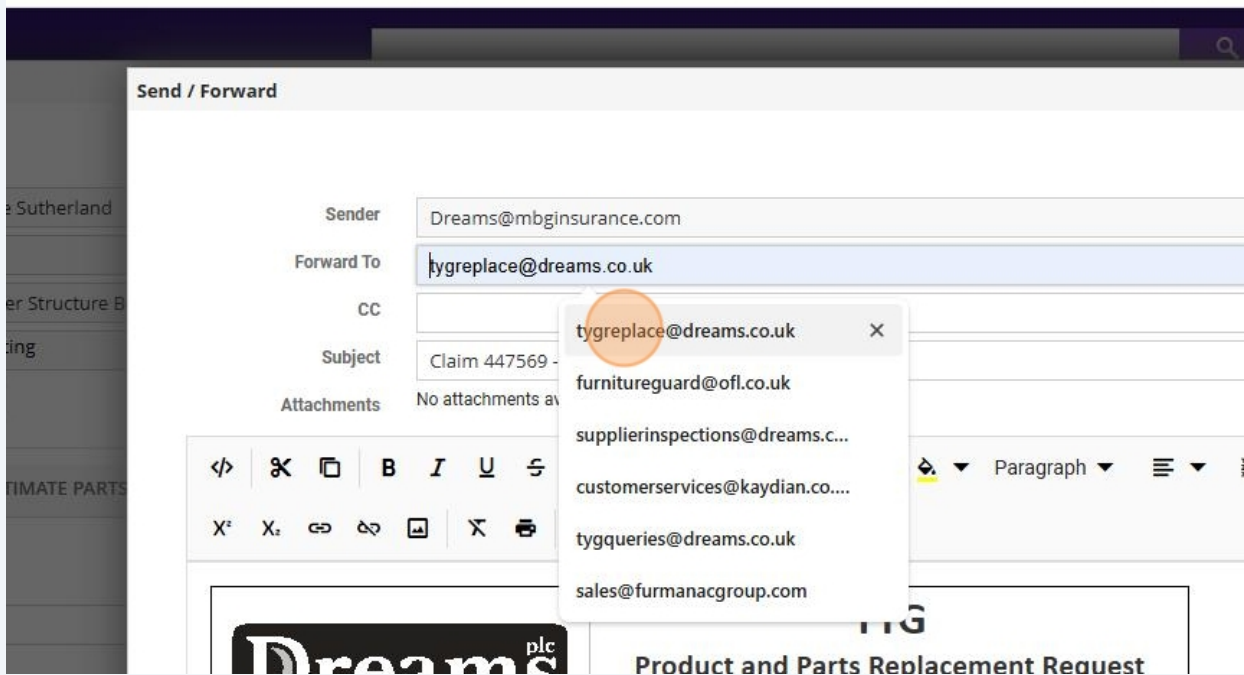
Description

SENDER	RECEIVED	ATTACHMENT	EMAIL SUBJECT	CATEGORY
dreams@mbginsurance....	29/10/2024 09:43	<input type="checkbox"/>	MB&G Insurance - Your Dreams Claim - Assessing Claim	Email Inbound

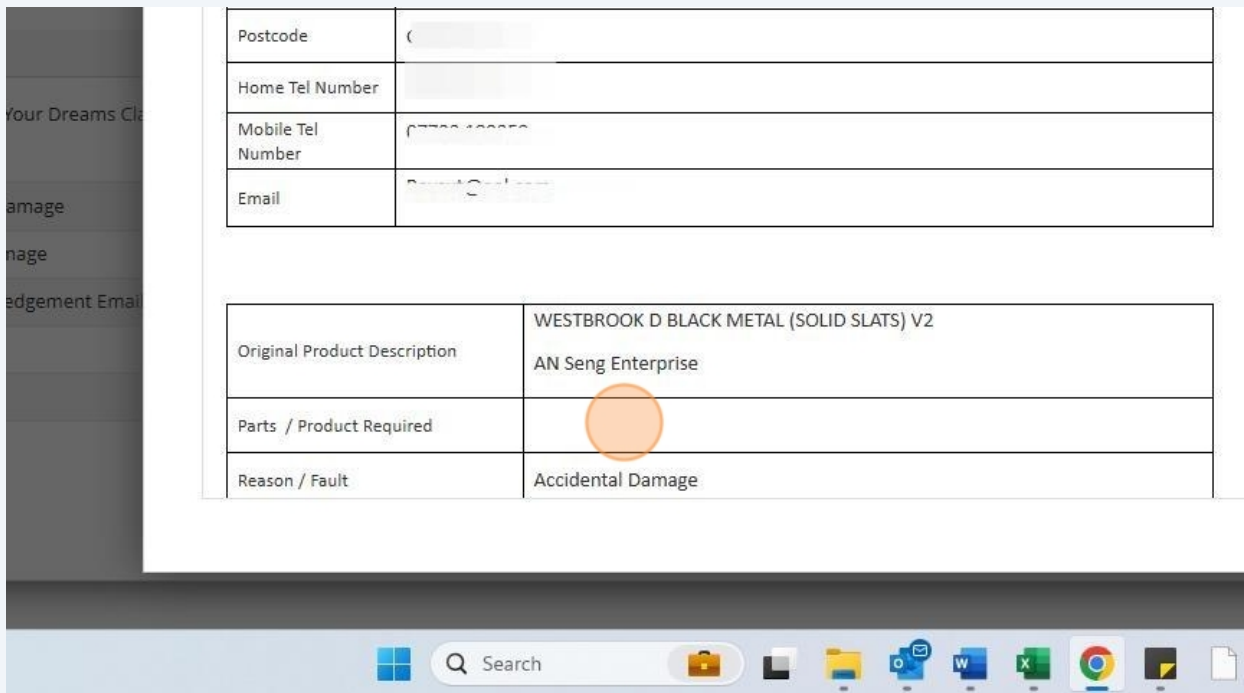
37 Double-click the "TYG Parts/Product Replacement Request Form"

FILE NAME	
Dreams - Parts Ordered - Delivery to Technician - Customer update	Email Outbound
Dreams - Parts Received	Email Outbound
Dreams - Product Under 12 Months - Referred to Dreams - Non Workflow	Email Outbound
Dreams - Rejection Reason	Email Outbound
Dreams - Rejection Reason - Postal Template	Email Outbound
Dreams - Repair Complete	Email Outbound
Dreams - Replacement Item - No Inspection Needed	Email Outbound
Dreams - TYG Parts/Product Replacement Request Form - Non Workflow	Email Outbound
FNOL Declaration	FNOL
FNOL Dreams Claim Form	FNOL
FNOL Submission Email	FNOL
Invoice DD Email Template	Email Outbound
Invoice Email Template	Email Outbound
MB&G Invoice Template	Invoice

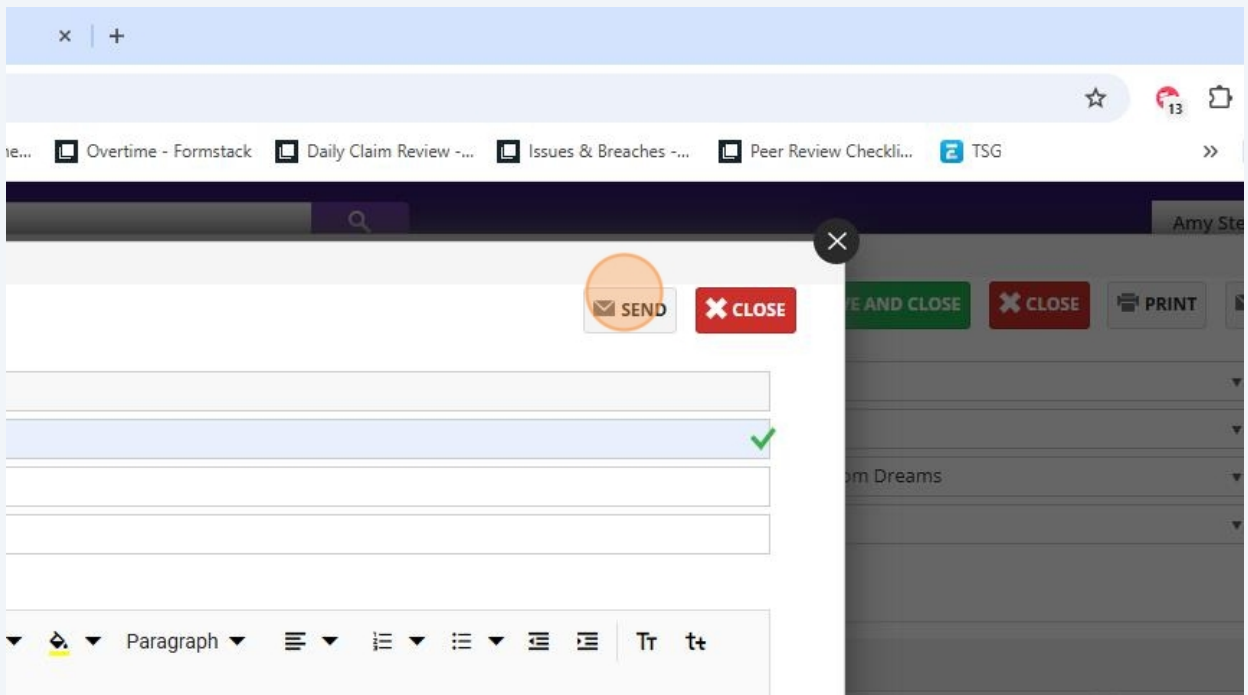
38 Enter the relevant email address into the "Forward to" box



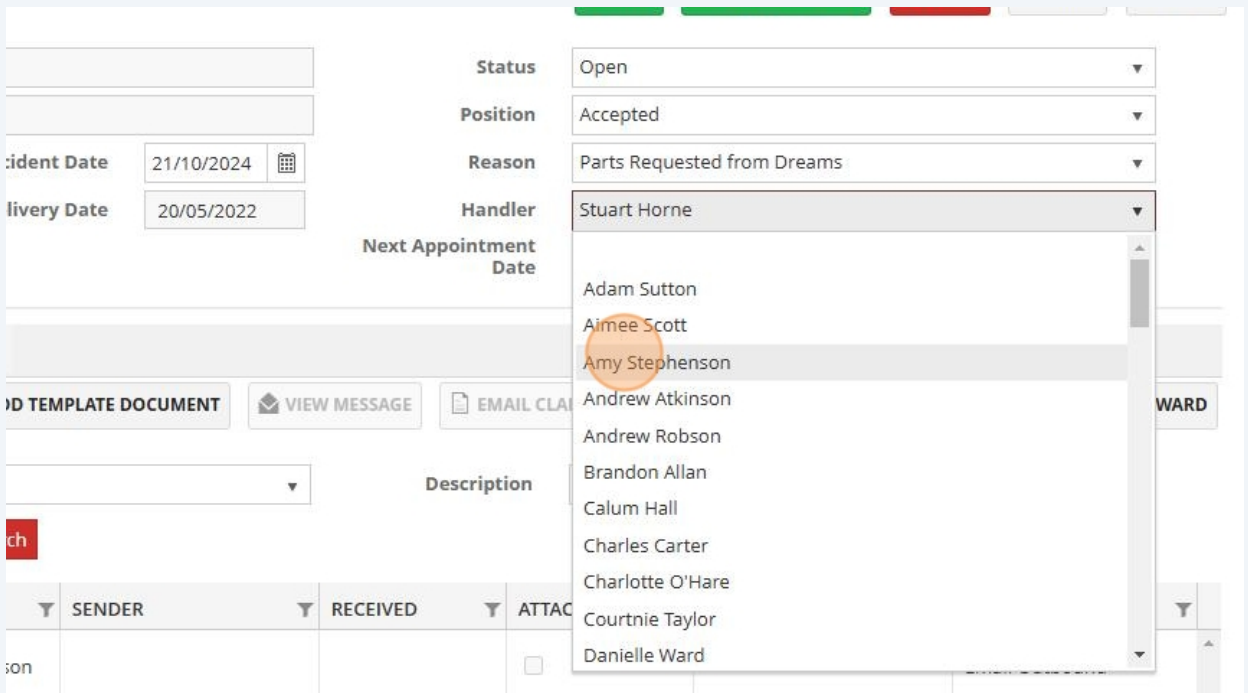
39 Scroll down to the "Parts / Product required" field and enter the name of the parts required



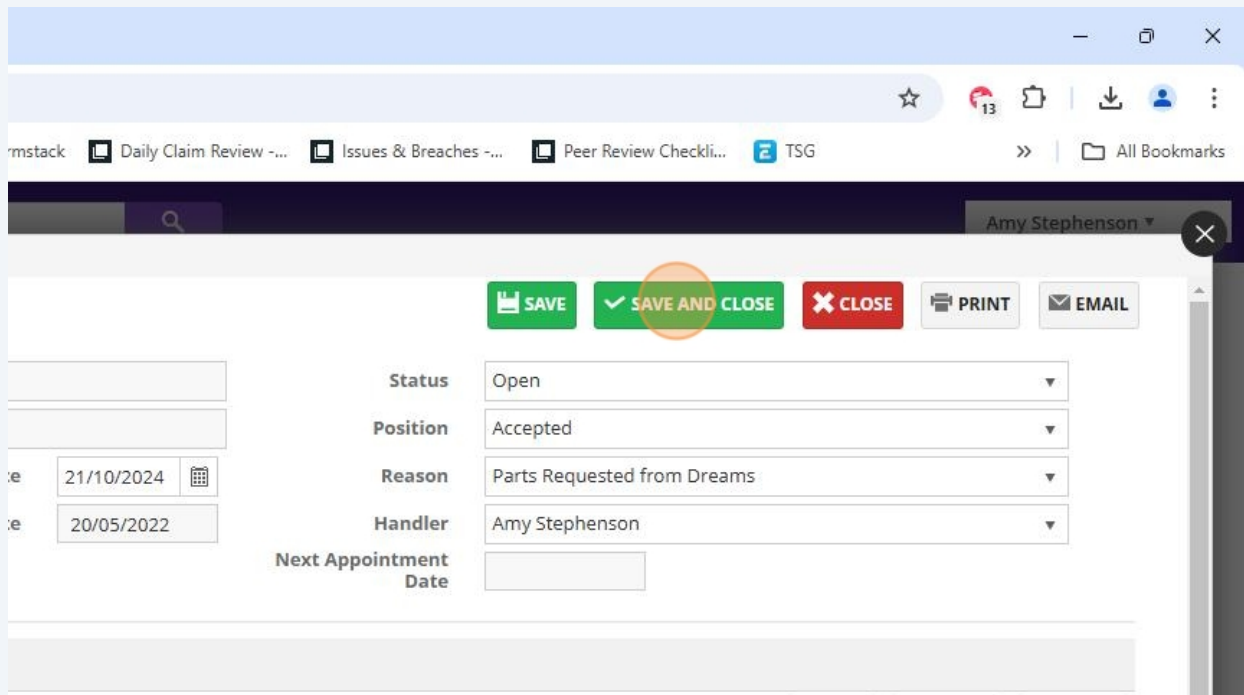
40 Press send



41 Change the handler to your name.



42 Click "Save and close"



The screenshot shows a web browser window with several tabs open: 'Daily Claim Review -...', 'Issues & Breaches -...', 'Peer Review Checkli...', and 'TSG'. The user is logged in as 'Amy Stephenson'. The main content area displays a form with the following fields:

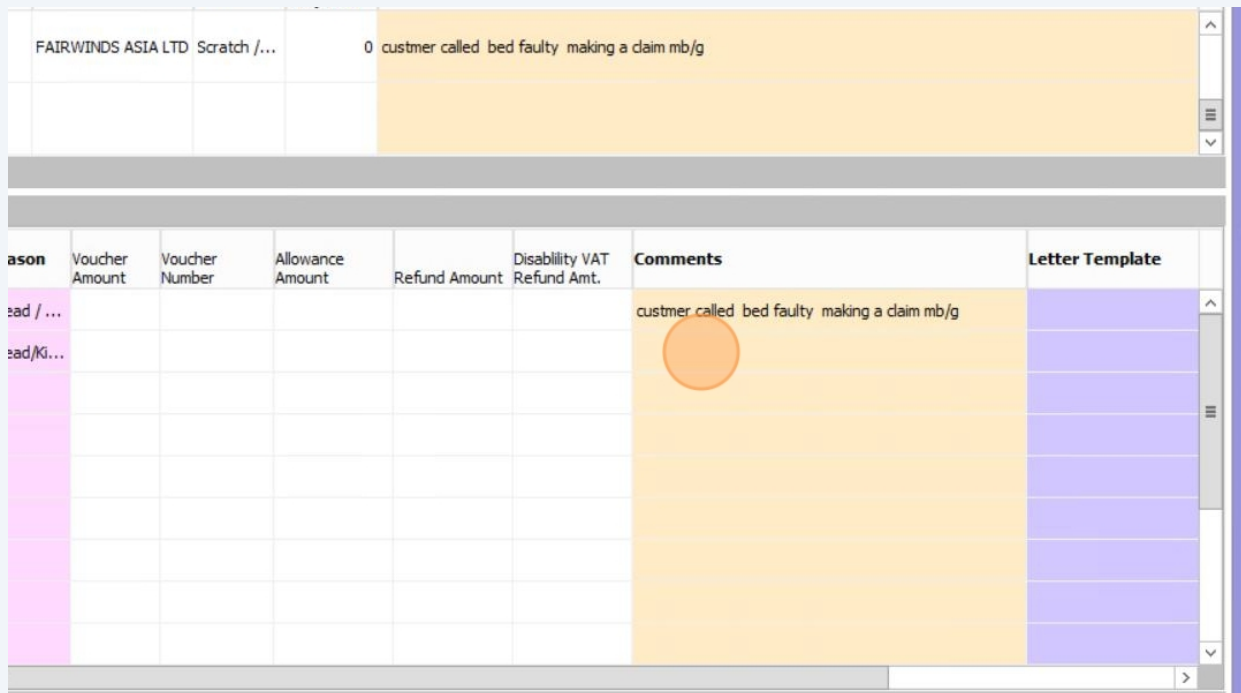
- SAVE** (green button)
- SAVE AND CLOSE** (green button with a checkmark, highlighted with an orange circle)
- CLOSE** (red button with an 'X')
- PRINT** (grey button)
- EMAIL** (grey button)

The form fields are:

- Status:** Open
- Position:** Accepted
- Reason:** Parts Requested from Dreams
- Handler:** Amy Stephenson
- Next Appointment Date:** (empty field)

On the left side, there are date pickers for '21/10/2024' and '20/05/2022'.

43 Leave a note on the Dreams system



The screenshot shows a table with the following columns: 'Person', 'Voucher Amount', 'Voucher Number', 'Allowance Amount', 'Refund Amount', 'Disability VAT Refund Amt.', 'Comments', and 'Letter Template'. The first row is highlighted in orange and contains the text '0 customer called bed faulty making a claim mb/g'. An orange circle highlights the 'Comments' cell in this row.

Person	Voucher Amount	Voucher Number	Allowance Amount	Refund Amount	Disability VAT Refund Amt.	Comments	Letter Template
FAIRWINDS ASIA LTD Scratch /...						0 customer called bed faulty making a claim mb/g	
ead / ...						customer called bed faulty making a claim mb/g	
ead/Kg...							