

An aerial, top-down view of a winding asphalt road with several cars of various colors (red, blue, white, black, yellow) driving along it. The road is surrounded by lush green trees and vegetation. The background is a solid dark blue color.

MB&G INSURANCE

Dreams

Raising An FNOL – Customer Has Not Matched To Their Policy

31.10.24

Dreams FNOL - Customer hasn't matched to their policy.

1

If a customer has matched their claim to their own policy, it will just say "FNOL" in the left column.

If they have not matched to their own policy, it will say "FNOL - Missing Policy".

Double-click on the claim.

FNOL	24/10/2024 10:51	FNOL037505	Dreams Claim FNOL	17
FNOL	24/10/2024 10:42	FNOL037503	Dreams Claim FNOL	36
FNOL	24/10/2024 09:44	FNOL037499	Dreams Claim FNOL	36
FNOL	24/10/2024 09:09	FNOL037498	Dreams Claim FNOL	06
FNOL	23/10/2024 22:19	FNOL037497	Dreams Claim FNOL	30
FNOL	23/10/2024 20:25	FNOL037494	Dreams Claim FNOL	88
FNOL	23/10/2024 19:00	FNOL037492	Dreams Claim FNOL	03
FNOL - Missing Policy	23/10/2024 16:51	FNOL037488	Dreams Claim FNOL	09

2

Click the documents button next to "FNOL Reference" to access the customer's details.

Service Power Homeserve Job Syst... Bright HR PowerBI Vulnerable Custome... Overtime - Formstack Daily Claim Review -..

Defect

FNOL Reference	<input type="text" value="FNOL037488"/>		
Claim Reference	<input type="text" value="Open selected record"/>		
Notification Date	<input type="text" value="23/10/2024"/>	Incident Date	<input type="text" value="01/10/2024"/>
Order Date	<input type="text"/>	Delivery Date	<input type="text"/>

Action

3

Copy the order number provided by the customer.

If the customer has not provided an order number, use their post code to validate their policy using the Dreams system.

Scribe | Workspace

HR PowerBI Vulnerable Custome... Overtime - Formstack Daily Claim Review -... Issues & Breaches -... Peer Review Checkli..

Dreams Order Number

Policy

Approval Date


Is the Delivery Address different to the Home Address?

4 Do your normal policy validation checks

Dreams LIVE - Microsoft Dynamics NAV Classic - [888H433122 Mrs Saranyaa Krishnashankar - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping **Payments** Communication Customer Service

No. 888H433122 

Sell-to Customer No. . . . B888

Sell-to Contact No. . . . B888-CT924873

Sell-to Customer Name

Sell-to Address

Sell-to Address 2

Sell-to City Gloucester

Sell-to County/Post Code

Sell-to Contact

Related Back To Back 0

Customer Collection **Staff Sales Order**
Sleepmatch

Order Amount. **1,363.00**

Payments 1,303.00

Financed Amount 0.00

BALANCE **60.00**

Intake Value. **1,363.00**

Status Released

Order Status. **Delivered**

Order Date 28/11/20

Delivery Date 02/02/21

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

Times Delivery Date Changed 0

Salesperson Code

Location Code HDD-CF

Interaction Count 3

Archived Versions 95

TBA Comments 0

Overall Special

Telesales Order

	A1	Collection	Auto	Warranty	Warranty	MTM	Route	Postcode	Description
Re...	Reallocation	Branch Stock	Pay a...	Description	Item No.		No.		
0									256-00155 Francis SK Grey
0				281120_050621 BED_750 8	256-00155		GL	GL1 1QN	Bed Cover Primary Item
0							GL	GL1 1QN	Francis SK Grey Otto Elect

5 Make sure the name on the order matches the name on the FNOL form.

If it is a completely different person, the customer may have provided the wrong order number.

Use the post code to find the correct customer.

Dreams LIVE - Microsoft Dynamics NAV Classic - [090A011613 Miss E BHAGOTRA - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication Customer Service

No. 090A011613

Sell-to Customer No. . . . B090

Sell-to Contact No. . . . B090-CT029356

Sell-to Customer Name . . .

Sell-to Address

Sell-to Address 2 Edgbaston

Sell-to City Birmingham

Sell-to County/Post Code

Sell-to Contact

Related Back To Back . . . 0

Customer Collection . . . Staff Sales Order
 Sleepmatch

Order Amount. 1,372.00

Payments 0.00

Financed Amount 1,372.00

BALANCE 0.00

Intake Value. 1,372.00

Status Released

Order Status. Delivered

Order Date 29/11/16

Delivery Date 14/12/16

Times Delivery Date Changed . 0

Salesperson Code . . . SF37

Location Code. HDD-WD

Interaction Count 1

Archived Versions 1

TBA Comments 0

Overall Special . . .

Telesales Order

Reallocation	Branch	Stock Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0				291116_141251 MATT3P HI 8	135-00413		B	B15 3EF	Enchantment K Mattress
0							B	B15 3EF	Bed Cover Primary Item
0							B	B15 3EF	Store Discretionary upto 5

6 Go back to the holding area and click "Close"

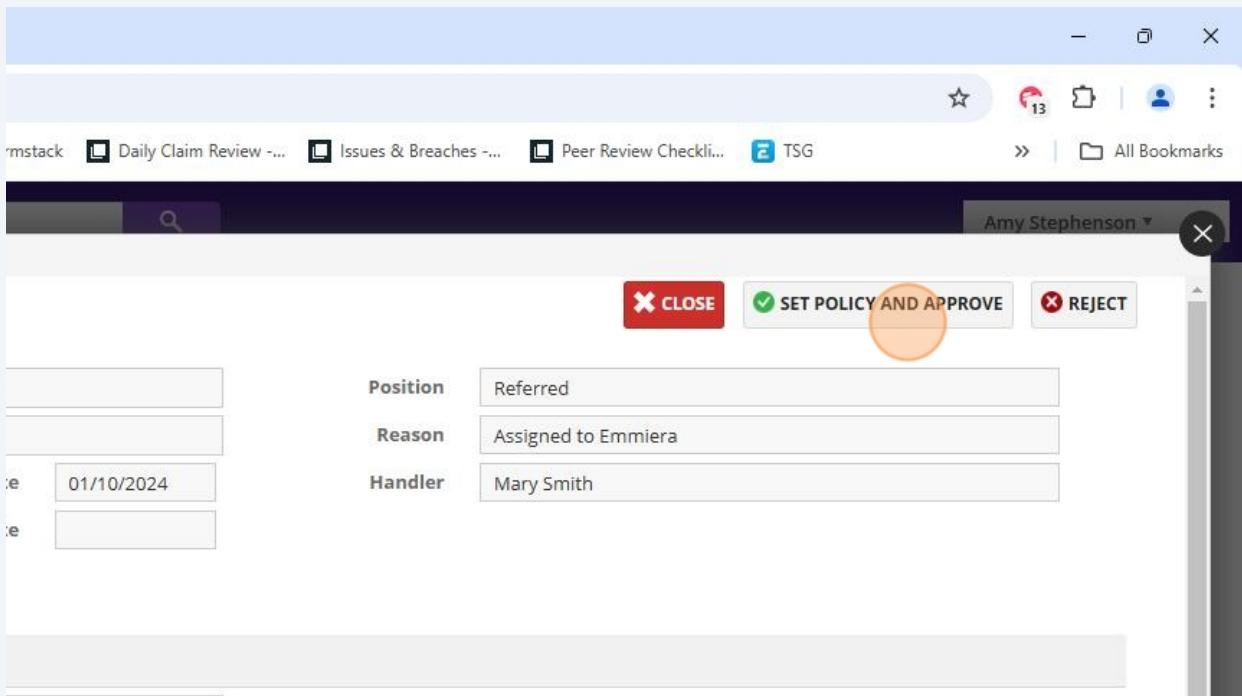
Order number 090A011613

Policy

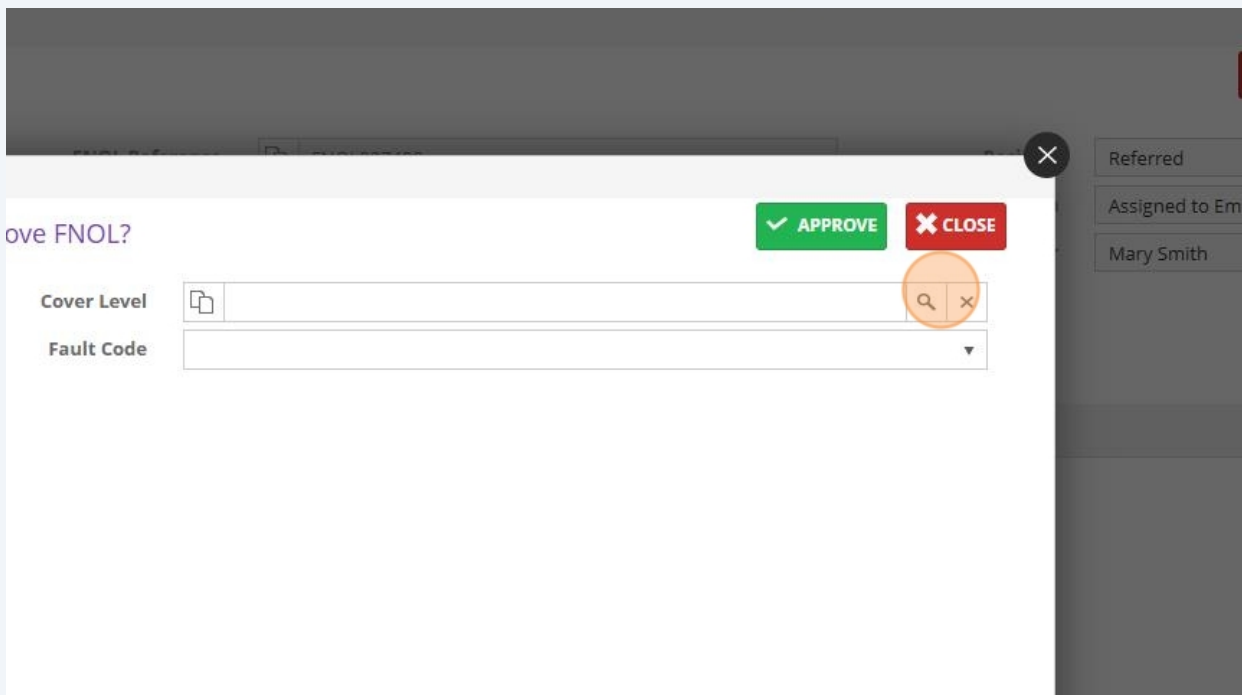
Primary Address is the Home Address? No

SET POLICY AND APPROVE REJECT

7 Press "Set Policy and Approve"



8 Click the magnifying glass



9

Paste the order number into the external reference number box and press "Search".

mbandg.evoclaim.com/Claim/FNOLs

login | Five9 | EvoSuite - Login | Dreams | Service Power | Homeserve Job Syst... | Bright HR | PowerBI | Vulnerable Custome... | Overtime - Forms

IR&G

Level

Policy Number

Provider

Broker

External Ref No

Seller Branch

Surname

Forename

Postcode

Address

Created After Before

ORDER NUMBER	STATUS	NAME	SELLER BRANCH	MB&G REP	POSTCODE	INCEPTION
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10

Double-click the correct policy

Policy Number

Provider

Broker

External Ref No

Seller Branch

Surname

Forename

Postcode

Address

Created After Before

STATUS	NAME	SELLER BRANCH	MB&G REP	POSTCODE	INCEPTION
Active	<input type="text"/>	<input type="text"/>	<input type="text"/>	B15 3EF	14/12/2016

11 Select the relevant fault code.

Approve FNOL?

✓ APPROVE ✗ CLOSE

Cover Level

Fault Code

- AD2 Accidental Damage
- AD2 Accidental Damage & C01
- AD2 Accidental Damage & C02 Cosmetic Damage
- AD2 Accidental Damage & C03 Sofa Beds (Kyoto Futons) Models
- AD2 Accidental Damage & C04 Standard Mattress
- AD2 Accidental Damage & C05 Tempur Mattress
- AD2 Accidental Damage & C06 Mattress Cleaning
- AD2 Accidental Damage & C07 Divan Base
- AD2 Accidental Damage & C08 Bedsteads
- AD2 Accidental Damage & C09 Bedsteads: Slats & Caps (Sprung Slats)
- AD2 Accidental Damage & C10 Bedsteads: Slats (Solid Slats)
- AD2 Accidental Damage & C11 Bedstead: Pistons

12 Click "Approve"

PowerBI Vulnerable Custome... Overtime - Formstack Daily Claim Review - ... Issues & Breaches - ... Peer Review Checkli...

✗ CLOSE ✓ S

✗

Referred

Assigned to Emmiera

Mary Smith

✓ APPROVE ✗ CLOSE

AD2 Accidental Damage & C04 Standard Mattress

13

If the customer has noted anything important in this box, such as a vulnerability, this must be logged on the claim.

Click "Close"

Warranty	Notification Date	23/10/2024	Incident Date	01/10/2024	Reason
	Order Date		Delivery Date	14/12/2016	Handler

Key Note X CLOSE

Created 23/10/2024 16:51 **Author** Service Process

Note
 Is there anything else you wish to tell us about your claim?:
 Do you agree with the above declaration?: Yes
 Declaration Date: 23/10/2024

14

Click "Notes"

Warranty	Claim Reference	447484	Status	Open
	FNOL Reference	FNOL037488	Position	Refer
Warranty	Notification Date	23/10/2024	Incident Date	01/10/2024
	Order Date		Delivery Date	14/12/2016
			Reason	Assigned
			Handler	Manager
			Next Appointment Date	

PAYMENTS **NOTES** TASKS DOCUMENTS HISTORY API

Repair	Maximum Liability	Claim
Action	Claims Incurred	RV
Fraud Check Complete	Repair Excess	£
Specific Requests / Directions	Claim Fee	£
	Current Reserve	£

15 Click "Add"

	Status	Open
	Position	Referred
01/10/2024	Reason	Assigned to Emmiera
14/12/2016	Handler	Mary Smith
	Next Appointment Date	

+ ADD **DELETE**

NOTE

Is there anything else you wish to tell us about your claim?: Do you agree with the above declaration?: Yes Declaration Date: 23/10/2024

16 Leave a note explaining the action taken and press "Add and close"

Notification Date 23/10/2024 Incident Date 01/10/2024

Reason Assigned
Handler Mary
Appointment Date

Add Claim Note

NEW CLAIM NOTE **+ ADD** **✓ ADD AND CLOSE** **✗ CLOSE**

Date 28/10/2024

Author Amy Stephenson

Claim Note Type

FNOL - Passed to Emmiera

17 Change the handler name to your name

Amy Stephenson

SAVE SAVE AND CLOSE CLOSE PRINT EMAIL

Date 01/10/2024
Date 14/12/2016

Status Open
Position Referred
Reason Assigned to Emmiera
Handler Mary Smith
Next Appointment Date

+ ADD DELETE

NOTE
Is there anything else you wish to tell us about your claim?: Do you agree with the above declaration?: Yes Declaration Date: 23/10/2024

18 Click "Save and close"

rmstack Daily Claim Review -... Issues & Breaches -... Peer Review Checkli... TSG

Amy Stephenson

SAVE SAVE AND CLOSE CLOSE PRINT EMAIL

Date 01/10/2024
Date 14/12/2016

Status Open
Position Referred
Reason Assigned to Emmiera
Handler Amy Stephenson
Next Appointment Date

19 Leave a note in the Dreams system.

Activity Reason	Voucher Amount	Voucher Number	Allowance Amount	Comments
Progress Chase				Cust called to report that mattress is no longer comfortable and would like to make a bedcover claim. Sent online claims form
Defective Mattress				cust called abt faulty <math>\langle\text{matt.}\rangle\text{.advised inspection + MB\&G process}
Defective Mattress				