

An aerial, top-down view of a multi-level highway interchange. The roads are light grey with yellow lane markings. Numerous cars of various colors (red, blue, white, black, yellow) are visible on the roads. The interchange is surrounded by lush green trees and vegetation. The background is a solid dark blue color.

MB&G INSURANCE

Dreams System

Policy Validation – No SOs Or CSTYGs

01.11.24

Dreams System Process: Policy Validation - No SOs or CSTYGs

1 Use the search tool to find your policy.

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

Sell-to Customer No. . . . B322

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

Sell-to Customer Name . . .

Sell-to Address

Sell-to Address 2 Kinnel Bay

Sell-to City Rhyl

Sell-to County/Post Code Clwyd

Sell-to Contact

Related Back To Back . . . 0

Customer Collection . . . Staff Sales Order Sleepmatch

Order Amount. 1,301.99

Payments 0.00

Financed Amount 1,301.99

BALANCE 0.00

Intake Value. 1,301.99

Status Released

Order Status. Delivered

Order Date 22/09/19

Delivery Date 06/11/19

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

Times Delivery Date Changed . 0

Salesperson Code MUJ02

Location Code. HDD-WA

Interaction Count 1

Archived Versions 3

TBA Comments 0

Overall Special . . .

Telesales Order

	A1	Collection	Auto	Warranty	Route	Postcode	Description
Reallocation	Branch	Stock	Pay a...	Item No.	No.		
0							256-00175 Hopkins SK Ott
0					LL	LL18 5JQ	Hopkins SK Ottoman Oatm
0					LL	LL18 5JQ	Hopkins SK Ottoman Oatm
0					LL	LL18 5JQ	Hopkins SK Ottoman Oatm

2

When you have found your customer, you will see their order.

Their Bed Cover or Ten Year Guarantee policy will be listed as an item.

If it is not listed here, it wasn't purchased.

The screenshot displays a CRM software interface for an order. The top section shows order details: Order Amount of 1,301.99, Order Date of 22/09/19, and Delivery Date of 06/11/19. The status is 'Delivered'. Below this is a table of line items. A red circle highlights the 'Bed Cover' item, which is a primary item with a unit price of 85.00 and a line amount of 85.00. The table also lists other items like 'Hopkins SK Ottoman Oatmeal Fabric Oatmeal' and 'Hopkins SK Ottoman Oatmeal Box 1(Head&Foot End)'. The bottom of the interface shows navigation options like 'Back To Back Vendor No.', 'Delivery Status: Waiting', and 'Linked Docs'.

Allocation	Branch Stock Location	Collection	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description	Quantity	Rtn Qty	Unit of Measure	Unit Price Incl. VAT	Line Amount Incl. VAT	Line Disc...	C
							LL	LL18 53Q	256-00175 Hopkins SK Ottoman Fabric Oatmeal			0.00				
							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box 1(Head&Foot End)	1	1.00	EACH	229.10	229.10		
							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box 2(SRail, CR, Cyl, MSupp	1	1.00	EACH	204.45	204.45		
							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box 3(Top Base)	1	1.00	EACH	237.32	237.32		
							LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box 4(Bottom Base)	1	1.00	EACH	81.20	81.20		
				220919_102713 BED HI 8	256-00175		LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box 5(Mechanism)	1	1.00	EACH	146.93	146.93		
							LL	LL18 53Q	Bed Cover - primary Item	1	1.00	EACH	85.00	85.00		
							LL	LL18 53Q	Clava Protectionary 5.0% - 10%	1	1.00	EACH	-80.01	-80.01		
							LL	LL18 53Q	Assembly - Ottoman Bedframe D,K,SK (Inc Driv)	1	1.00	EACH	50.00	50.00		
							LL	LL18 53Q	Deacon Storage Box Natural Fabric	1	1.00	EACH	199.00	199.00		
							LL	LL18 53Q	Furniture Range 3 for 2	1	1.00	EACH	-59.66	-59.66		
							LL	LL18 53Q	Kimberley Bedside Oatmeal	2	2.00	EACH	149.00	298.00		
							LL	LL18 53Q	Furniture Range 3 for 2	1	1.00	EACH	-89.34	-89.34		
							LL	LL18 53Q	Free Del Over£100 Mon-Fri (Chargeable Weekends)	1	1.00	EACH				

3 Some orders may have multiple items but only one bed cover policy.

To see which item is covered, click the number in the "Warranty Item No".

The screenshot shows the 'Customer Service' tab of a sales order. The order number is 322A007614. The order amount is 1,301.99, and the balance is 0.00. The order status is 'Delivered'. Below the form is a table of items with the following columns: Location, Branch Stock Location, Auto Pay a..., Warranty Description, Warranty Item No., MTM, Route No., Postcode, Description, Quantity, Rtn Qty, Unit of Measure, Unit Price, Line Amount, and Line Disc. The 'Warranty Item No.' for the first item is circled in orange and contains the value '256-00175'.

Location	Branch Stock Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description	Quantity	Rtn Qty	Unit of Measure	Unit Price	Line Amount	Line Disc...
				256-00175		LL	LL18 53Q	256-00175 Hopkins SK Ottoman Fabric Oatmeal	1	1.00	EACH	229.10	229.10	
						LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box1(Head&Foot End)	1	1.00	EACH	204.45	204.45	
						LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box2(SRail,CR,Cyl,MSupp	1	1.00	EACH	237.32	237.32	
						LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box3(Top Base)	1	1.00	EACH	81.20	81.20	
						LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box4(Bottom Base)	1	1.00	EACH	146.93	146.93	
						LL	LL18 53Q	Hopkins SK Ottoman Oatmeal Box5(Mechanism)	1	1.00	EACH	85.00	85.00	
						LL	LL18 53Q	Bed Cover Primary Item	1	1.00	EACH	-80.01	-80.01	
						LL	LL18 53Q	Store Discretionary 5.0% - 10%	1	1.00	EACH	50.00	50.00	
						LL	LL18 53Q	Assembly - Ottoman Bedframe D,K,SK (Inc Driv	1	1.00	EACH	199.00	199.00	
						LL	LL18 53Q	Deacon Storage Box Natural Fabric	1	1.00	EACH	-59.66	-59.66	
						LL	LL18 53Q	Furniture Range 3 for 2	2	2.00	EACH	149.00	298.00	
						LL	LL18 53Q	Kimberley Bedside Oatmeal	1	1.00	EACH	-89.34	-89.34	
						LL	LL18 53Q	Furniture Range 3 for 2	1	1.00	EACH			
						LL	LL18 53Q	Free Del Over£100 Mon-Fri (Chargeable Weekends)	1	1.00	EACH			

4 Before raising a claim you must check that the customer hasn't received a full replacement on the furniture.

To validate the policy, go to the customer service tab

The screenshot shows the 'Customer Service' tab of a sales order. The order number is 322A007614. The order amount is 1,301.99, and the balance is 0.00. The order status is 'Delivered'. The 'Customer Service' tab is highlighted with an orange circle. Below the form is a table of items with the following columns: Line, A1, Reallocation, Branch Stock Location, Auto Pay a..., Warranty Description, Warranty Item No., MTM, Route No., Postcode, Description. The 'Warranty Item No.' for the first item is '256-00175 Hopkins SK Ottoman Oatmeal'.

Line	A1	Reallocation	Branch Stock Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0						256-00175 Hopkins SK Ott		LL	LL18 53Q	Hopkins SK Ottoman Oatm
0								LL	LL18 53Q	Hopkins SK Ottoman Oatm
0								LL	LL18 53Q	Hopkins SK Ottoman Oatm

5 Check the "Replaced by Order No box"

If this is empty, the customer has not received a replacement and their policy is still valid.

You can now raise your claim on Evo.

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

Return Order No. . . . Reason for Amendment . . .

Returned by Order No. . . 0 Comments on Amendment . . .

Replaced by Order No. . . 0

Return Reference 0

On Hold Classification . .

On Hold Class. Descrip...

	> A1	Collection	Auto	Warranty	MTM	Route	Postcode	Description
ne ...	Reallocation	Branch Stock Location ...	Pay a...	Item No.		No.		
	0					LL	LL 18 5JQ	256-00175 Hopkins SK Ott
	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