



MB&G INSURANCE

Dreams System

Policy Validation – Product Replaced By Dreams

In The First 12 Months

01.11.24

Dreams System Process: Policy Validation - Product Replaced by Dreams in the First 12 Months

1 Validate your policy by going to the "Customer Service" tab

Dreams LIVE - Microsoft Dynamics NAV Classic - [375A001677 Miss NATASHA NEEDHAM - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication **Customer Service**

No. 375A001677

Sell-to Customer No. . . . B375

Sell-to Contact No. . . . B375-CT001460

Sell-to Customer Name

Sell-to Address

Sell-to Address 2 Hucknall

Sell-to City Nottingham

Sell-to County/Post Code Nottinghamshire

Sell-to Contact

Related Back To Back 0

Customer Collection Staff Sales Order Sleepmatch

Order Amount. . . . 2,924.20

Payments -225.80

Financed Amount 2,500.00

BALANCE 650.00

Intake Value. . . . 2,924.20

Status Released

Order Status. . . . Delivered

Order Date 18/04/21

Delivery Date 18/05/21

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

Times Delivery Date Changed 0

Salesperson Code LB42

Location Code. . . . HDD-WD

Interaction Count 4

Archived Versions 1

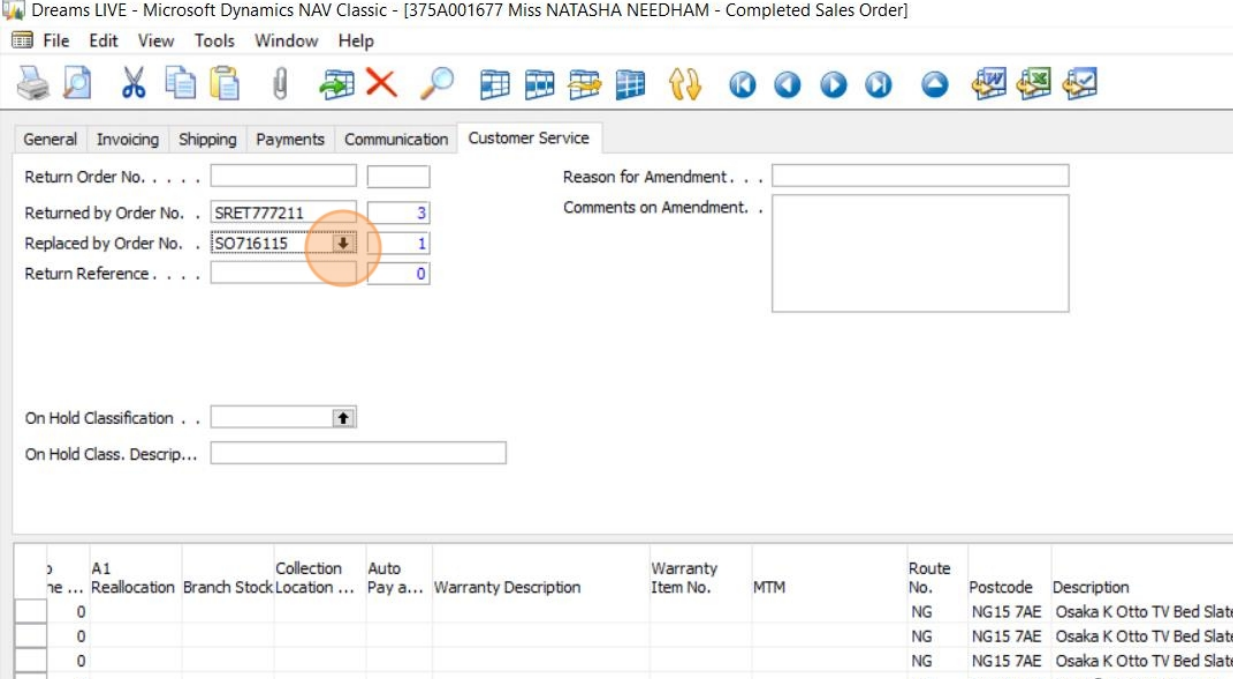
TBA Comments 0

Overall Special

Telesales Order

Reallocation	Collection Branch	Stock Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0							NG	NG15 7AE	Osaka K Otto TV Bed Slate
0							NG	NG15 7AE	Osaka K Otto TV Bed Slate
0							NG	NG15 7AE	Osaka K Otto TV Bed Slate

2 Click the grey arrow next to the SO/CSTYG number



Dreams LIVE - Microsoft Dynamics NAV Classic - [375A001677 Miss NATASHA NEEDHAM - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication **Customer Service**

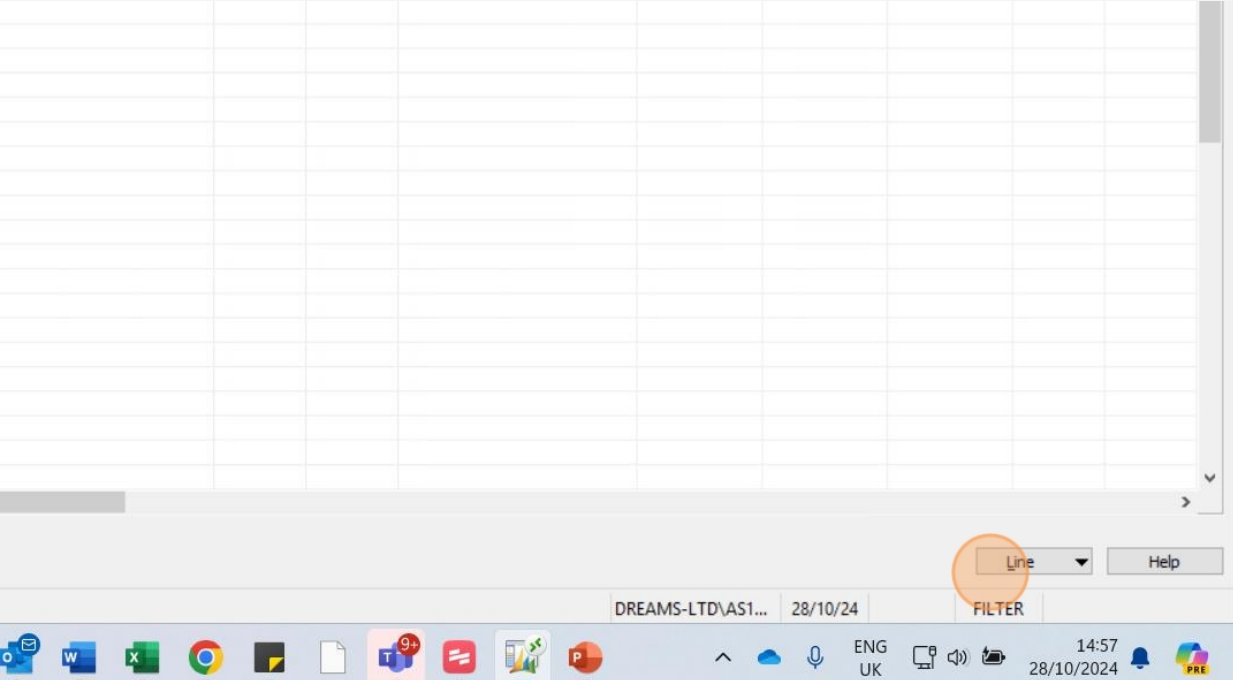
Return Order No.
Returned by Order No. . . . SRET777211 3
Replaced by Order No. . . . SO716115 1
Return Reference 0

Reason for Amendment
Comments on Amendment . . .

On Hold Classification . . .
On Hold Class. Descrip...

>	A1	Collection	Auto	Warranty	MTM	Route	Postcode	Description
	Reallocation	Branch Stock Location ...	Pay a...	Item No.		No.		
0						NG	NG15 7AE	Osaka K Otto TV Bed Slate
0						NG	NG15 7AE	Osaka K Otto TV Bed Slate
0						NG	NG15 7AE	Osaka K Otto TV Bed Slate

3 Click "Line"



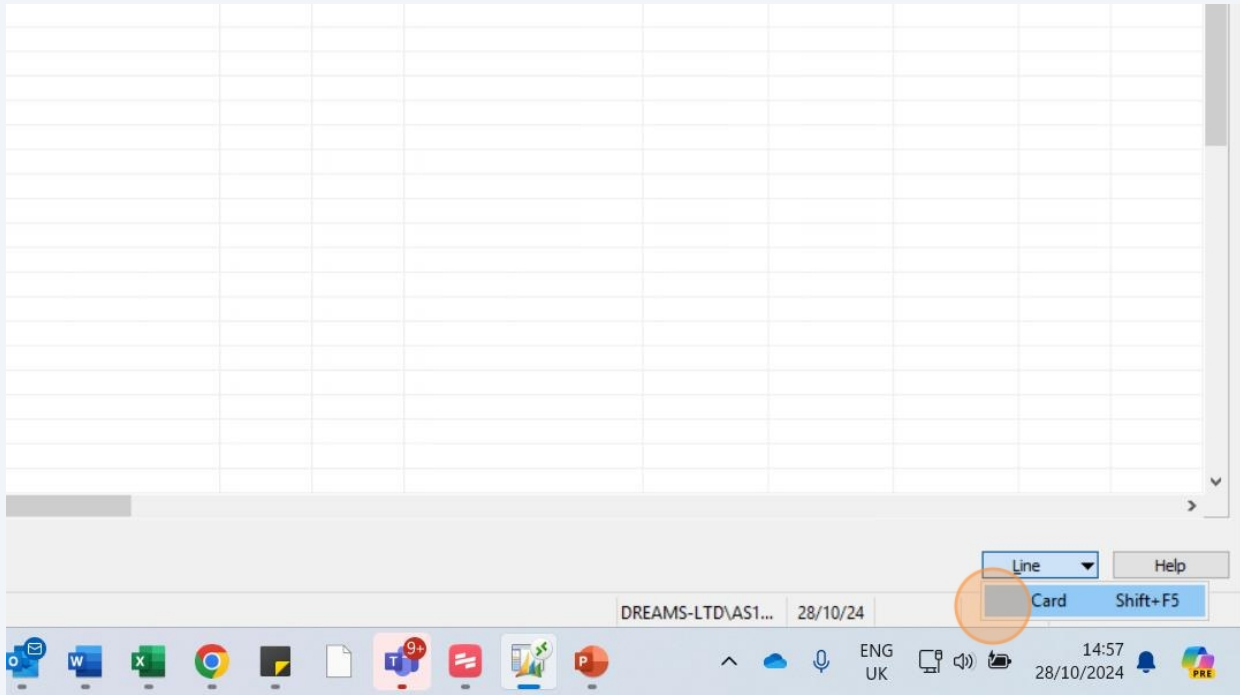
DREAMS-LTD\AS1... 28/10/24 FILTER

Line Help

14:57 28/10/2024

Line No.	Description	Quantity	Unit	Price	Total
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4 Click "Card"



5

If a full replacement has been done within the first 12 months, one of two scenarios has occurred:

1. Dreams have replaced the item due to a manufacturing defect within the first 12 months. If this has happened, the original cover would be carried over to the new product.
2. The customer has submitted an accidental damage claim on the original policy. The customer would need to take out a new policy on the replacement bed for us to consider a new claim.

Microsoft Dynamics NAV Classic - [S0716115 Miss NATASHA NEEDHAM - Completed Sales Order]

View Tools Window Help

Shipping Payments Communication Customer Service

S0716115

No. B375
 No. B375-CT001460
 Name: [Redacted]
 Address: Hucknall, Nottingham, Nottinghamshire

Order Amount: 2,098.00
 Payments: 0.00
 Financed Amount: 0.00
 Money owed/due: 0.00
BALANCE: 2,098.00

Order Date: 15/11/21
 Delivery Date: 17/01/22
 Daytime: 07:00:00 - 18:00:00
 Times Delivery Date Changed: 1
 Salesperson Code: LB42
 Location Code: HDD-WD
 Interaction Count: 0
 Archived Versions: 3
 TBA Comments: 0

Intake Value: 2,098.00
 Status: Released
 Order Status: Delivered

Staff Sales Order
 Sleepmatch

Back To	A1	Collection	Auto	Warranty	Warranty	Route	Postcode	Description	Quantity	Rtn Qty	Unit of Measure
Back Line	Reallocation	Branch Stock	Pay a...	Description	Item No.	MTM					
0						NG	NG 15 7AE	Osaka K Otto TV Bed Slate Box 1(End,Leg,Drv)	1		1.00 EACH
0						NG	NG 15 7AE	Osaka K Otto TV Bed Slate Box 2(FEnd,Mech,Leg)	1		1.00 EACH
0						NG	NG 15 7AE	Osaka K Otto TV Bed Slate Box 3(SR,BTMRail,HW,Gas)	1		1.00 EACH
0						NG	NG 15 7AE	Osaka K Otto TV Bed Slate Box 4(Base Panel)	1		1.00 EACH
0						NG	NG 15 7AE	Osaka K Otto TV Bed Slate Box 5(Lift Base)	1		1.00 EACH
0						NG	NG 15 7AE	Osaka K Otto TV Bed Slate Box 6(Lift Up Mechanism)	1		0.00 EACH
0						NG	NG 15 7AE	LG 43" 43LM6300 Smart	1		1.00 EACH
0						NG	NG 15 7AE	Assembly - TV Bed / Sound Bed / Adjustable	1		0.00 EACH

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You can check the notes on the VCS to confirm if this has been replaced by Dreams.

Press "Esc" to go back to the front page of the order.

Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description	Quantity	Rtn Qt
			NG	NG15 7AE	Osaka K Otto TV Bed Slate Box4(Base Panel)	1	
			NG	NG15 7AE	Osaka K Otto TV Bed Slate Box5(Lift Base)	1	
			NG	NG15 7AE	Osaka K Otto TV Bed Slate Box6(Lift Up Mechanism)	1	
			NG	NG15 7AE	LG 43" 43LM6300 Smart	1	
			NG	NG15 7AE	Kimberley Blanket Box Slate	1	
			NG	NG15 7AE	Furniture Range 3 for 2	1	
			NG	NG15 7AE	Kimberley Bedside Slate	1	
			NG	NG15 7AE	Furniture Range 3 for 2	1	
			NG	NG15 7AE	Kimberley Bedside Slate	1	
			NG	NG15 7AE	Furniture Range 3 for 2	1	
			NG	NG15 7AE	Holman K Mattress	1	
			NG	NG15 7AE	Store Discretionary upto 5.0%	1	
			NG	NG15 7AE	Silentnight So Cotton Fresh Pillow 4 Pack	1	
			NG	NG15 7AE	50% off Silentnight Bedding Promo Code	1	
			NG	NG15 7AE	Assembly - TV Bed / Sound Bed (255-00343/10000)	1	

Click To Back Vendor No.. Delivery Status.

DREAMS-LTI

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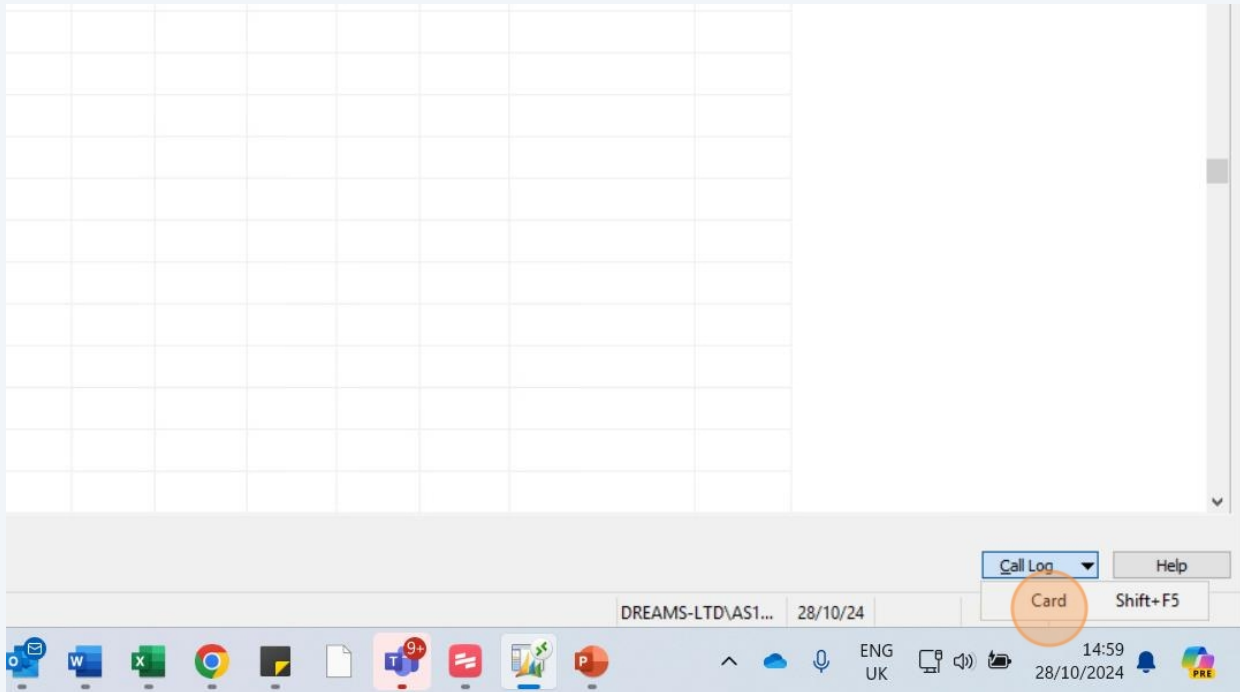
Click "Call Log"

						<input type="button" value="Call Log"/>	<input type="button" value="Help"/>
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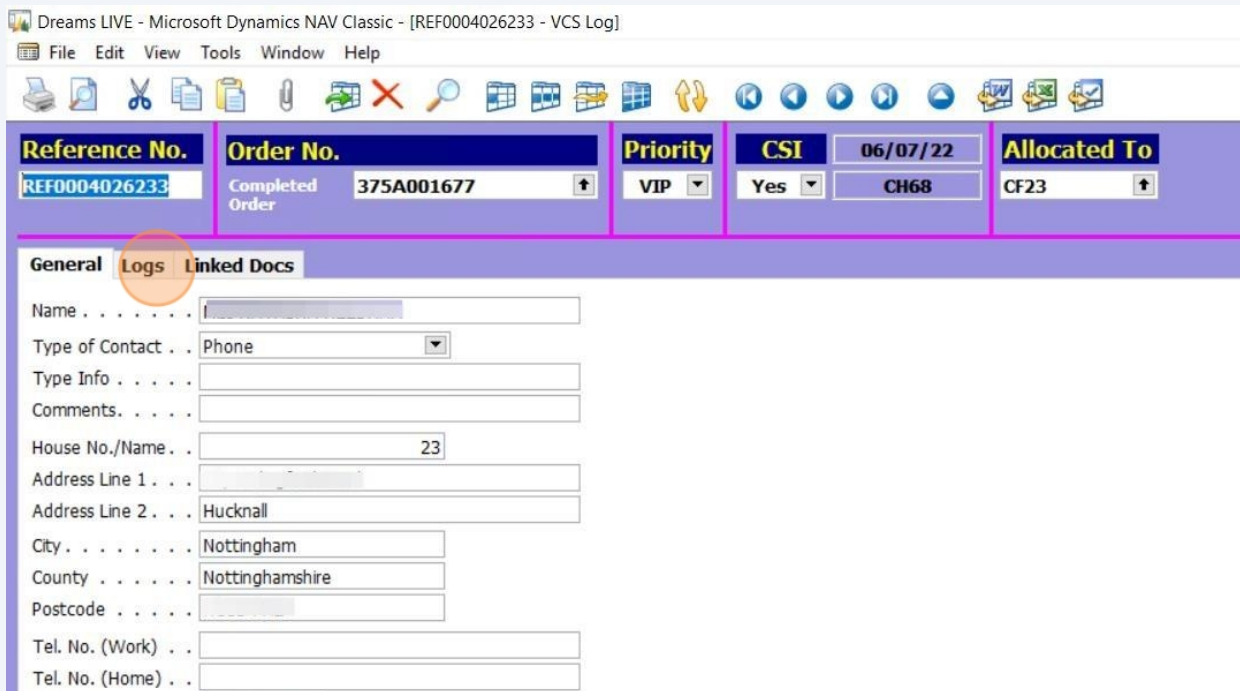
DREAMS-LTD\AS1... 28/10/24 FILTER

14:59 28/10/2024 ENG UK

8 Click "Card"



9 "Click "Logs"



10 Use the grey arrow on the right hand side to scroll through the notes.

ason	Voucher Amount	Voucher Number	Allowance Amount	Comments
is Chase				Ticket #376678 - cmr emailing about HS report - Alison has requested more information from HS about report
is Chase				Cust chasaing - spoke to H/S who advised they have called her 4 times and no response. H/S commercial team will tomm to discuss. Cust been advised.
is Chase				TRANS CMR TO HOMESERVE
e TV Bed				querying report with HS, s down as faulty due to minimal creaking, which if it is that minimal should not be considered manufacturing fault. Awaiting response from HS.
is Chase				crm called to chase update and so i have emaield central sales to get update
is Chase				Cust called wanting an update , i will email central sales ,cc Elena.. Cust is gettinh impatience as they said they have
is Chase				Customer chasing this up once more. Advised being looked into. Customer wishes to return bed. Line disconnected c reception.
e TV Bed				H/S report confirms fault. Faulty goods email and report sent to customer requesting to call cust serv or go to store reselection.
y Goods				Customer called back for the above. Not re-selecting as wants same bed. Aware no current lead time. Raising replac

11 The notes will show if the item has been replaced by Dreams.

Activity Reason	Voucher Amount	Voucher Number	Allowance Amount	Comments
Defective TV Bed				querying report with HS, s down as faulty due to minimal creaking, which if it is that minimal sh manufacturing fault. Awaiting response from HS.
y - Close ...	Progress Chase			crm called to chase update and so i have emaield central sales to get update
y - Close ...	Progress Chase			Cust called wanting an update , i will email central sales ,cc Elena.. Cust is gettinh impatience ;
y - Close ...	Progress Chase			Customer chasing this up once more. Advised being looked into. Customer wishes to return be reception.
Defective TV Bed				H/S report confirms fault. Faulty goods email and report sent to customer requesting to call c reselection.
Faulty Goods				Customer called back for the above. Not re-selecting as wants same bed. Aware no current le
Faulty Goods				
Faulty Goods				
Faulty Goods				

12 Go back to your replacement

Dreams LIVE - Microsoft Dynamics NAV Classic - [375A001677 Miss NATASHA NEEDHAM - 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. . . SRET777211 3 Comments on Amendment. . .

Replaced by Order No. . . SO716115 1

Return Reference. . . . 0

On Hold Classification . . ↑

On Hold Class. Descrip...

>	A1	Collection	Auto	Warranty	Warranty	MTM	Route	Postcode	Description
ne ...	Reallocation	Branch Stock Location ...	Pay a...	Pay a...	Item No.		No.		
<input type="checkbox"/>	0						NG	NG15 7AE	Osaka K Otto TV Bed Slate
<input type="checkbox"/>	0						NG	NG15 7AE	Osaka K Otto TV Bed Slate
<input type="checkbox"/>	0						NG	NG15 7AE	Osaka K Otto TV Bed Slate
<input type="checkbox"/>	0						NG	NG15 7AE	Osaka K Otto TV Bed Slate

13 Load the customer's original order on Evo

Provider Postcode

Broker Address

External Ref No 375A001677 Created After dd/MM/yy

Seller Branch

SALES ORDER NUMBER	STATUS	NAME	SELLER BRANCH	MB&G REP	PO
375A001677/1	Active	<input type="text"/>			NG

14 Paste the customer's SO/CSTYG number into the external reference number field.

It should look like "375A001677/1 / SOXXX"

The screenshot shows the MB&G Policy form. The 'External Ref No' field contains the value '375A001677/1' and is highlighted with an orange circle. Other fields include Policy Holder, Class Of Business (Household Furniture), Cover Level (Dream Cover Structure Beds 2nd to 8th year warranty), Taken Out Date, Delivery Date (18/05/20), Duration (96), and Waiting Period (12). Below the form is a navigation bar with tabs: DETAILS, PREMIUM, PAYMENTS, NOTES, DOCUMENTS, TASKS, CLAIMS, HISTORY, RELATED POLICIES. The DETAILS tab is active, showing fields for Provider (Dreams), Underwriter (Novus Underwriting), Insurer (Novus Underwriting), EvoClaim Policy Number (EC1840198), Product Category (E), Product Type, Product Size (5'), and Vendor Ref (VI).

15 Check the replacement product details

The screenshot shows a table of replacement product details. The first row is highlighted with an orange circle. The table has columns for Warranty Item No., MTM, Route No., Postcode, Description, Quantity, Rtn Qty, Unit of Measure, and Unit Price. The table contains 8 rows of data.

Warranty Item No.	MTM	Route No.	Postcode	Description	Quantity	Rtn Qty	Unit of Measure	Unit Price
		NG	NG15 7AE	Osaka K Otto TV Bed Slate Box 1(HEnd,Leg,Drw)	1	1.00	EACH	25
		NG	NG15 7AE	Osaka K Otto TV Bed Slate Box2(FEnd,Mech,Leg)	1	1.00	EACH	79
		NG	NG15 7AE	Osaka K Otto TV Bed Slate Box3(SR,BTMRail,HW,Gas)	1	1.00	EACH	12
		NG	NG15 7AE	Osaka K Otto TV Bed Slate Box4(Base Panel)	1	1.00	EACH	3
		NG	NG15 7AE	Osaka K Otto TV Bed Slate Box5(Lift Base)	1	1.00	EACH	11
		NG	NG15 7AE	Osaka K Otto TV Bed Slate Box6(Lift Up Mechanism)	1	0.00	EACH	6
		NG	NG15 7AE	LG 43" 43LM6300 Smart	1	1.00	EACH	61
		NG	NG15 7AE	Assembly - TV Bed / Sound Bed / Adjustable	1	0.00	EACH	9

16 If it is the same product, you do not need to make any amendments.

If the product was different, these details would need to be updated.

The screenshot shows a product details form with the following fields:

- TASKS CLAIMS HISTORY RELATED POLICIES** (Navigation tabs)
- Product Category:** Bed
- Product Type:** (Dropdown menu)
- Product Size:** 5'0 King
- Vendor Ref:** V03636
- Manufacturer:** Kaydian LTD (highlighted with an orange circle)
- Model:** OSAKA K OTTOMAN TV BED SLATE 43" SMART TV
- Vulnerable?:** No
- Delivery Address:** (Section header)
- Different Delivery Address?:** No
- Number:** (Input field)
- Anniversary:** (Input field)
- 518:** (Input field)

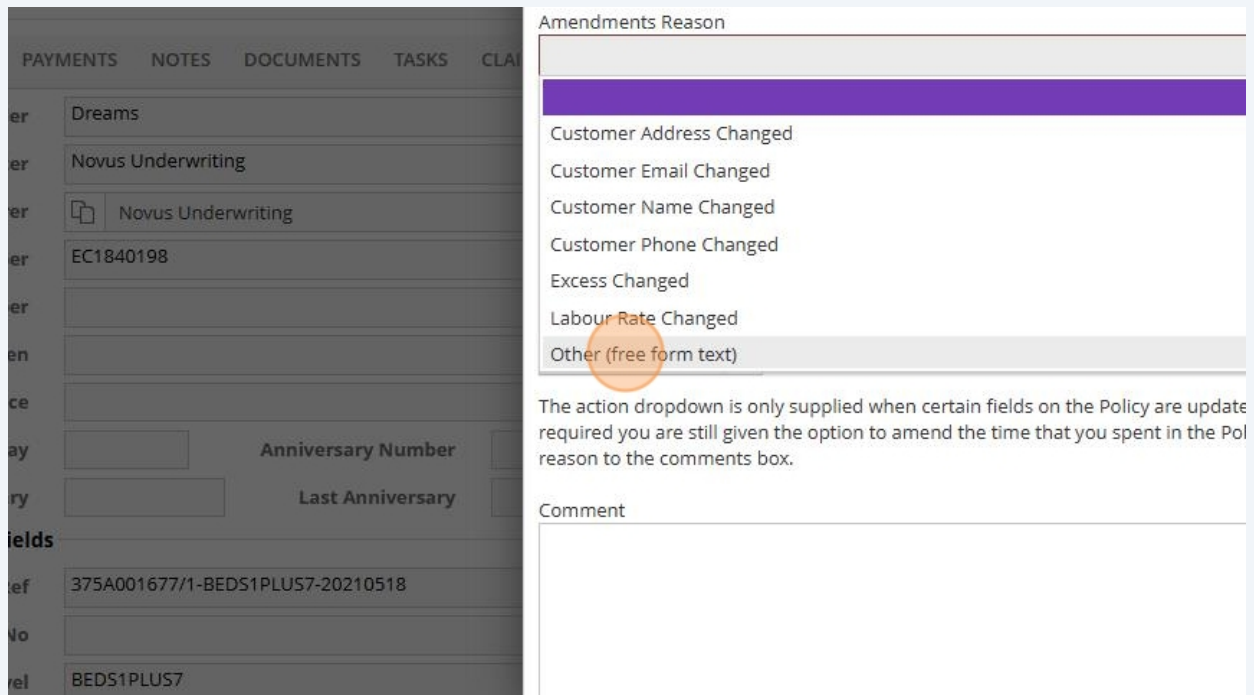
On the right side, there is a partial view of a 'Sales I...' button.

17 Click "Save"

The screenshot shows a policy edit form with the following fields and buttons:

- EDIT - Dreams system - policy** (Browser tab)
- EvoSuite - Edit Policy** (Browser tab)
- 31** (Page number)
- Vulnerable Custome...** (Link)
- Overtime - Formstack** (Link)
- Daily Claim Review -...** (Link)
- Issues & Breaches -...** (Link)
- Peer Review Checkli...** (Link)
- TSG** (Link)
- SAVE** (Button, highlighted with an orange circle)
- SAVE AND CLOSE** (Button)
- CLOSE** (Button)
- RENEW POLICY** (Button)
- 18/05/2021** (Date field)
- Expiry Date:** 17/05/2029
- Policy Status:** Active
- Policy Liability:** RV
- Claim Liability:** RV
- Claims Incurred:** GBP 0.00
- 96** (Input field)
- Months** (Text)
- 12** (Input field)
- Months** (Text)
- S** (Page number)

18 Select "Other" for the amendment reason



The screenshot shows a policy amendment form. On the left, there are tabs for PAYMENTS, NOTES, DOCUMENTS, TASKS, and CLAIMS. Below these are several input fields, some containing text like 'Dreams', 'Novus Underwriting', and 'EC1840198'. At the bottom, there are fields for 'Anniversary Number' and 'Last Anniversary'. On the right, the 'Amendments Reason' dropdown menu is open, listing various reasons such as 'Customer Address Changed', 'Customer Email Changed', 'Customer Name Changed', 'Customer Phone Changed', 'Excess Changed', 'Labour Rate Changed', and 'Other (free form text)'. The 'Other (free form text)' option is highlighted with a purple bar and a red circle. Below the dropdown, there is a 'Comment' text area.

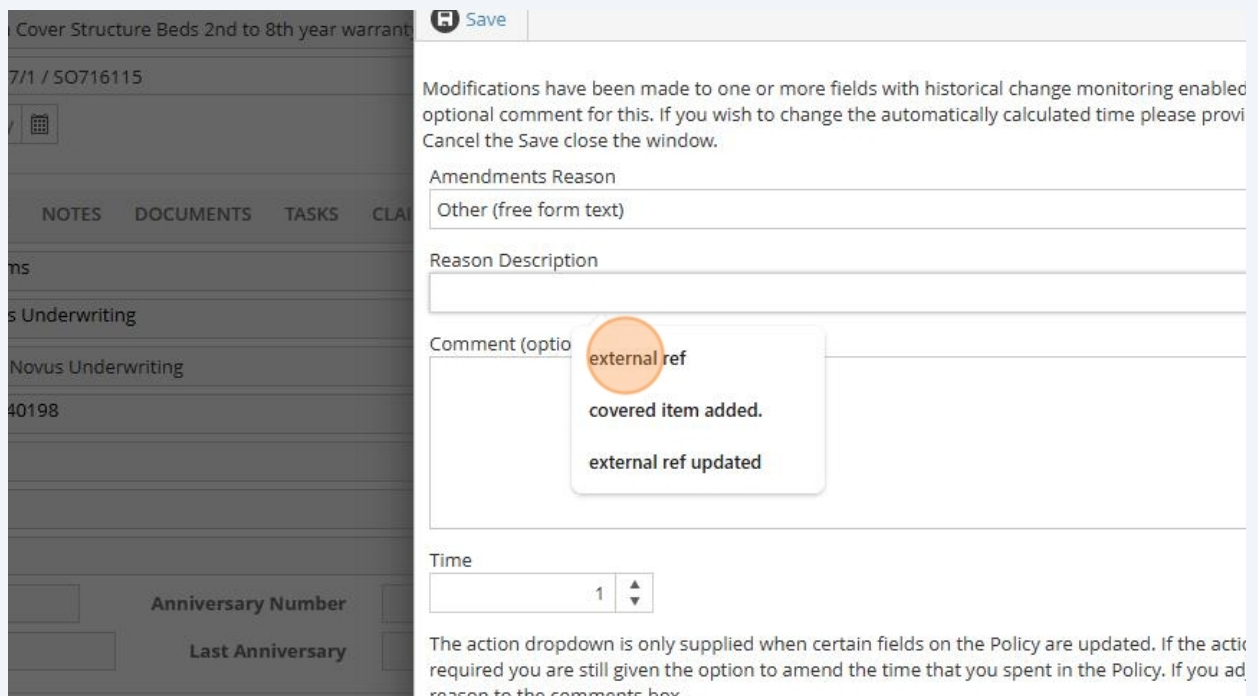
Amendments Reason

- Customer Address Changed
- Customer Email Changed
- Customer Name Changed
- Customer Phone Changed
- Excess Changed
- Labour Rate Changed
- Other (free form text)

The action dropdown is only supplied when certain fields on the Policy are update required you are still given the option to amend the time that you spent in the Pol reason to the comments box.

Comment

19 Type "External reference number updated" in the reason description



The screenshot shows a policy amendment form. At the top, there is a 'Save' button. Below it, there is a text area for 'Reason Description' containing the text 'external ref covered item added. external ref updated'. The 'Amendments Reason' dropdown menu is open, showing 'Other (free form text)' selected. Below the dropdown, there is a 'Comment (optional)' text area. At the bottom, there is a 'Time' field with a dropdown menu showing '1'. The 'Reason Description' field is highlighted with a red circle.

Modifications have been made to one or more fields with historical change monitoring enabled optional comment for this. If you wish to change the automatically calculated time please provide optional comment for this. Cancel the Save close the window.

Amendments Reason

- Other (free form text)

Reason Description

Comment (optional)

Time

The action dropdown is only supplied when certain fields on the Policy are updated. If the action required you are still given the option to amend the time that you spent in the Policy. If you add reason to the comments box.

20 Click "Save"

The screenshot shows a web application interface with a 'History Record' dialog box open. The dialog box has a 'Save' button highlighted with a red circle. The background shows a form with fields for 'Delivery Date' (18/05/2021), 'Household Furniture', 'Dream Cover Structure Beds 2nd to 8th year warrant', and '375A001677/1 / SO716115'. The 'History Record' dialog box contains a warning message, an 'Amendments Reason' field with 'Other (free form text)', a 'Reason Description' field with 'external ref', and a 'Comment (optional)' field.

History Record

Save

Modifications have been made to one or more fields with historical change r optional comment for this. If you wish to change the automatically calculated Cancel the Save close the window.

Amendments Reason

Other (free form text)

Reason Description

external ref

Comment (optional)