



MB&G INSURANCE

Dreams System

Policy Validation – SO or CSTYG Full Replacement
With New Bed Cover

01.11.24

Dreams System Process: Policy Validation -SO/CSTYG Full Replacement with New Bed Cover

1 Find your policy then head to the "Customer Service" tab.

Dreams LIVE - Microsoft Dynamics NAV Classic - [SO652345 Miss SUSAN.A THOMAS - Completed Sales Order]

File Edit View Tools Window Help

Customer Service

No. SO652345

Order Amount. 1,612.00

Order Date 09/12/20

Sell-to Customer No. . . . B103

Payments 63.00

Delivery Date 19/04/21

Sell-to Contact No. . . . B103-CT036699

Financed Amount 0.00

Money owed/due 0.00

Sell-to Customer Name

BALANCE 1,549.00

Sell-to Address

Make Payment

Sell-to Address 2

Allowances

Sell-to City Hounslow

Intake Value. 1,612.00

Sell-to County/Post Code Middlesex

Status Released

Sell-to Contact

Order Status. Delivered

Related Back To Back ... 0

Customer Collection Staff Sales Order Sleepmatch

Q	A1	Collection	Auto	Warranty	Route	Postcode	Description
Reallocation	Branch	Stock	Pay a...	Item No.	No.		
0					TW	TW3 1QG	Tempur Cooltouch Original
10000					TW	TW3 1QG	Therapur ActiGel Plus Resp
0		TP01			TW	TW3 1QG	Clear Blue X Mattress Bags

2 Check the "Replaced by Order No" box.

If there is an SO or a CSTYG, this implies the customer has either had replacement parts or a full replacement.

Dreams LIVE - Microsoft Dynamics NAV Classic - [SO652345 Miss SUSANA THOMAS - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication Customer Service

Return Order No. . . . SRET698329 1 Reason for Amendment . . .

Returned by Order No. . SRET910248 1 Comments on Amendment . .

Replaced by Order No. . CSTYGAL967 1

Return Reference . . . 0

On Hold Classification . .

On Hold Class. Descrip...

	A1	Reallocation	Branch Stock	Collection Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0									TW	TW3 1QG	Tempur Cooltouch Original
10000									TW	TW3 1QG	Therapur ActiGel Plus Resp
0				TP01					TW	TW3 1QG	Clear Blue X Mattress Bags
0									TW	TW3 1QG	Clear Blue X Mattress Bags

3 Click the grey arrow.

Dreams LIVE - Microsoft Dynamics NAV Classic - [SO652345 Miss SUSANA THOMAS - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication Customer Service

Return Order No. . . . SRET698329 1 Reason for Amendment . . .

Returned by Order No. . SRET910248 1 Comments on Amendment . .

Replaced by Order No. . CSTYGAL967 1

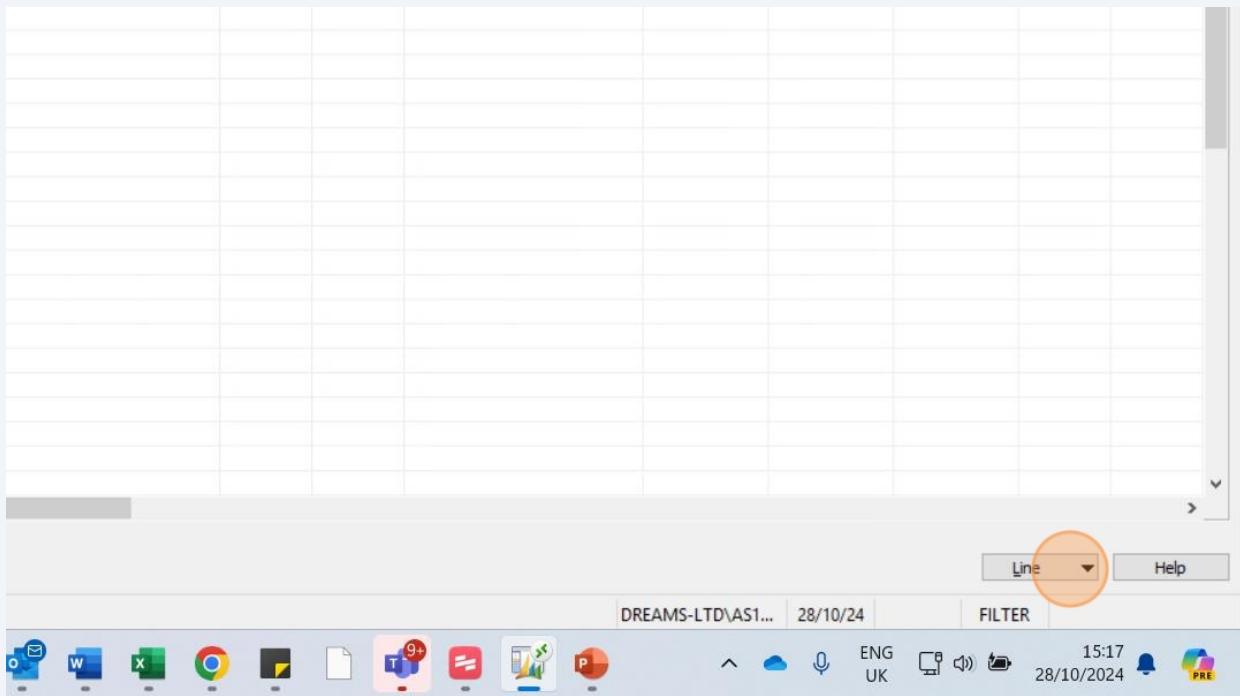
Return Reference . . . 0

On Hold Classification . .

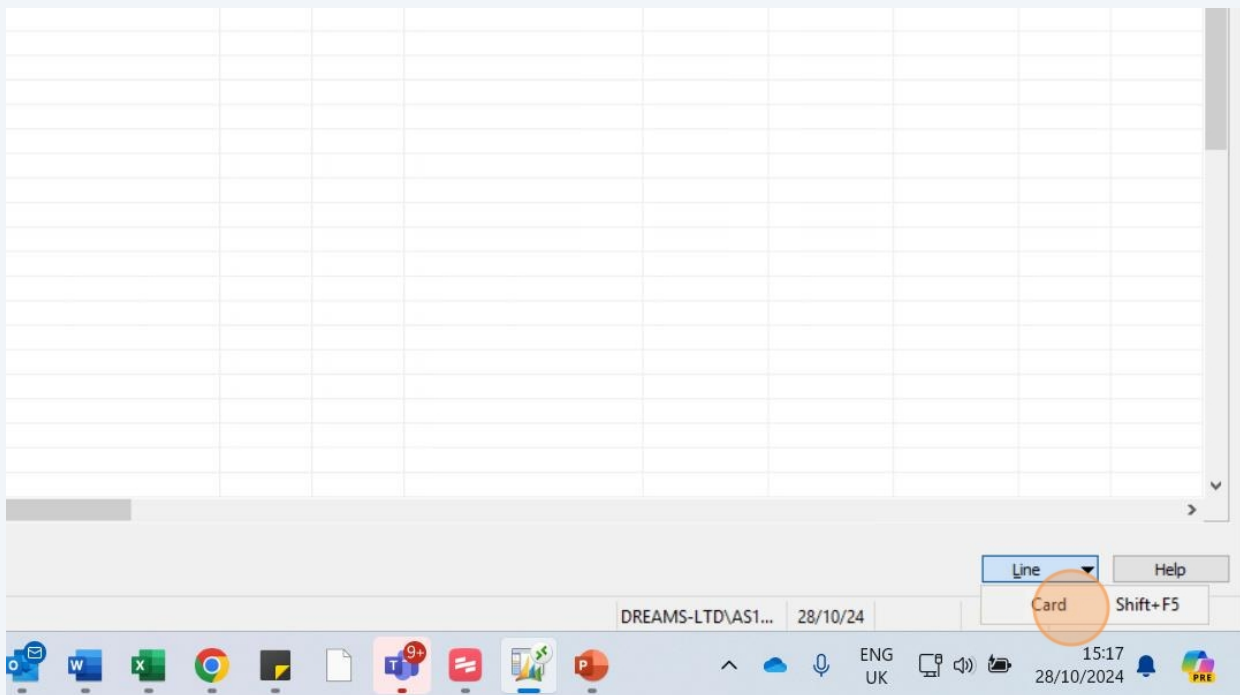
On Hold Class. Descrip...

	A1	Reallocation	Branch Stock	Collection Location	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
0									TW	TW3 1QG	Tempur Cooltouch Original
10000									TW	TW3 1QG	Therapur ActiGel Plus Resp
0				TP01					TW	TW3 1QG	Clear Blue X Mattress Bags
0									TW	TW3 1QG	Clear Blue X Mattress Bags

4 Click "Line"



5 Click "Card"



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If the SO/CSTYG number has a full replacement on it and there is a Bed Cover policy on the order, this means that the customer has had an accepted claim and they have taken out a new policy on their replacement item

Screenshot of a software interface showing order details. The top section contains fields for Salesperson Code, Location Code (HDD-HW), Interaction Count (4), Archived Versions (3), and TBA Comments (0). There are checkboxes for Overall Special and Telesales Order. The main table lists items with columns for Location, Branch Stock, Collection, Auto Pay, Warranty Description, Warranty Item No., MTM, Route No., Postcode, and Description. A red circle highlights the 'Delivery' row. The bottom section shows Delivery Status (Ready to Ship) and buttons for Comments, Contact/Actions Log, Order, Line, Functions, and Print.

Location	Branch Stock	Collection	Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
							TW	TW3 1QG	Nature's Finest 14450 D Mattress Medium
							TW	TW3 1QG	Promotion Extension
							TW	TW3 1QG	Delivery
							TW	TW3 1QG	Bed Cover Primary Item
							TW	TW3 1QG	Flaxby Quilted Mattress Protector D
							TW	TW3 1QG	Free Mattress Protector (Bed Cover)

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This SO/CSTYG number becomes the new policy number and will be on Evo as a new policy.

Screenshot of a software interface showing a table of items. The table has columns for Auto Pay, Warranty Description, Warranty Item No., MTM, Route No., Postcode, and Description. A red circle highlights the 'Bed Cover Primary Item' row. The interface also shows a top section with input fields for values 4, 3, and 0.

Auto Pay a...	Warranty Description	Warranty Item No.	MTM	Route No.	Postcode	Description
				TW	TW3 1QG	Nature's Finest 14450 D Mattress Medium
				TW	TW3 1QG	Promotion Extension
				TW	TW3 1QG	Delivery
				TW	TW3 1QG	Bed Cover Primary Item
				TW	TW3 1QG	Flaxby Quilted Mattress Protector D
				TW	TW3 1QG	Free Mattress Protector (Bed Cover)

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This must be treated like any other policy number and be validated by checking for anymore SO/CSTYG numbers.

Click the "Customer Service" tab.

Dreams LIVE - Microsoft Dynamics NAV Classic - [CSTYGAL967 SUPPLIER DEBITS - Completed Sales Order]

File Edit View Tools Window Help

General Invoicing Shipping Payments Communication **Customer Service**

No. CSTYGAL967

Order Amount **1,214.50**

Order Date 16/08/23

Sell-to Customer No. SUPPLIER DE... View Store

Payments 48.00

Delivery Date 12/09/23

Sell-to Contact No. CT100544

Financed Amount 685.00

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

Sell-to Customer Name SUPPLIER DEBITS

BALANCE **481.50**

Times Delivery Date Changed 0

Sell-to Address 10 YR GUARANTEE CLAIMS

Make Payment

Salesperson Code

Sell-to Address 2

Allowances

Location Code HDD-HW

Sell-to City

Interaction Count 4

Sell-to County/Post Code

Archived Versions 3

Sell-to Contact

TBA Comments 0

Related Back To Back 0

Intake Value **1,214.50**

Status Released

Customer Collection Staff Sales Order

Order Status **Delivered**

Sleepmatch

Overall Special

Telesales Order

Type	No.	Stock Type	YODEL UPI No.	Back to Back Sle...	Back To P.O. Req...	Back To Back Orde...	Back To Back Line ...	A1	Reallocation	Collection Branch Stock Location ...	Auto Pay a...	Warranty Description
Item	131-00909	Special		✓	Y23-STK...		10000					
Item	Z11-00013	Value...					0					
Item	Z22-00023	Charge					0					
Item	Z23-00023	Charge					0					160923 0842EIMATTOR

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If the box next to "Replaced by Order No" is empty, you can now raise the claim on Evo.

If there are any SO/CSTYG numbers showing, they need to be checked to ensure the cover is still valid.

Dreams LIVE - Microsoft Dynamics NAV Classic - [CSTYGAL967 SUPPLIER DEBITS - Completed Sales Order]

File Edit View Tools Window Help

Shipping Payments Communication Customer Service

Return Order No. . . . SRET910248 1 Reason for Amendment . . .

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

Replaced by Order No. . . . 0

Return Reference 0

On Hold Classification . . . JC HOLD

On Hold Class. Descrip... Jon Catten on hold till resolved

Type	No.	Stock Type	YODEL UPI No.	Back to Back Sle...	Back to P.O. Req...	Back To Back Orde...	Back To Back Line ...	A1 Reallocation	Collection Branch StockLocation ...	Auto Pay a...	Warranty Description
Item	131-00909	Special			✓	Y23-STK...	10000				
Item	Z11-00013	Value...					0				
Item	Z22-00023	Charge					0				
Item	Z23-00027	Charge					0				160023 0845251MATTOR