



**MB&G** INSURANCE

# Oak Furnitureland

Desktop Assessment

06.11.24

# OFL Desktop Assessment

1 Go to "Documents"

The screenshot displays a software interface for document management. At the top, a navigation bar contains several tabs: "E PARTS", "ESTIMATE LABOUR", "PAYMENTS", "NOTES", "TASKS", "DOCUMENTS" (highlighted with an orange circle), "HISTORY", and "API". Below the navigation bar, the main content area is divided into sections. On the left, there are several empty input fields. In the center, there are fields for "Claim Reference" (442672), "Notification Date" (16/09/2024), "Incident Date" (16/09/2024), and "Delivery Date" (12/09/2023). Below these fields, there are dropdown menus for "Repair" (set to "Repair") and "Action" (set to "DTA Process"). Further down, there are fields for "Incident Location" and "Show Incident Loc" (set to "No"). On the right side, there is a vertical list of items, including "Next Appo", "Maximum", "Claims I", "Repai", "Cl", "Current", and "Te".

2 If there are no photos in the documents tab, the claim has been raised manually.

Copy the claim number and search it in the OFL inbox.

The screenshot shows a web browser window with a tab titled "Scribe | Workspace". The browser's address bar and various extension icons (Service Power, Homeserve Job Syst..., Bright HR, PowerBI, Vulnerable Custome..., Overtime - Formstack, Daily Claim Review) are visible. The main content area displays a form with the following fields:

- Claim Reference**: 442672 (highlighted with an orange circle)
- Notification Date**: 16/09/2024
- Incident Date**: 16/09/2024
- Delivery Date**: 12/09/2023

Below the form is a navigation bar with tabs: ESTIMATE PARTS, ESTIMATE LABOUR, PAYMENTS, NOTES, TASKS, DOCUMENTS (selected), HISTORY, API. At the bottom right of this bar are buttons: + ADD, DELETE, EXPORT, and + ADD TEMPLATE DOCUMENT.

3 Find the customer's images and assess which parts are needed.

The screenshot shows an email interface. At the top, there are filters: "Categorized", "Flagged", "Important", "Close Search", and a menu icon. The email content starts with "Claim ref : 442672" (highlighted in yellow). Below this is a sender profile for "TM" (Oak Furniture Land). To the right of the sender information are buttons for "Reply", "Reply All", "Forward", and a share icon. The date "Sat 26/10/2024 1" is visible. The main body of the email contains a large image of a grey fabric sofa, with an orange circle highlighting a specific area on the fabric.

## 4 Go to details

### Claim

Policy Holder	<input type="text"/>
External Ref No	off-8631601
Cover Level	<input type="text"/> Furniture Guard
Underwriter	Novus Underwriting
Vulnerable?	No

Claim Reference	442672
Notification Date	16/09/2024
Delivery Date	12/09/2024

DETAILS FINANCE POLICE PARTIES ESTIMATES ESTIMATE PARTS ESTIMATE LABOUR PAYMENTS NOTES TASKS DO

Sender

Category

<input type="checkbox"/>	OPEN	DESCRIPTION	FILE NAME
<input type="checkbox"/>	<a href="#">Open</a>	MB&G Insurance - Your Oak Furnitureland Claim - Assessing Claim	MB&G Insurance - Your Oak Furnitureland Claim - Assessing Claim.eitrem1

## 5 Set the "Incident cause" to match the "Incident type"

Registration No.	off-8631601-1
Incident Category	Sofa
Incident Type	Accidental Damage
Incident Detail	Material Issue
Incident Description	4 seater sofa bottom cushion cover zip is ripped off. don't know how it happened
Incident Cause	<input type="text"/>
Cause Description	<input type="text"/>
Report Reviewed	dd/MM/yyyy

Incident Location	<input type="text"/>
Show Incident Loc	No

6

Copy and paste the "Incident description" and paste it into the "Cause description field"

The screenshot shows a form with the following fields and values:

- Asset: ofl-8631601-1 - OFL / 37043
- Component: [Empty]
- Purchase Date: [Empty]
- Registration No.: ofl-8631601-1
- Incident Category: Sofa
- Incident Type: Accidental Damage
- Incident Detail: Material Issue
- Incident Description: 4 seater sofa bottom cushion cover zip is ripped off. don't know how it happened
- Incident Cause: Accidental Damage
- Cause Description: [Empty]
- Report Reviewed: dd/MM/yyyy
- Repair Action: DTA Proces
- Incident Location: [Empty]
- Show Incident Loc: No

An orange circle highlights the text in the "Incident Description" field.

7

Set the "Report reviewed" as today's date

The screenshot shows the same form as above, but with the "Cause Description" field now containing the text from the "Incident Description" field. The "Report Reviewed" field is highlighted with an orange circle.

The "Cause Description" field now contains: 4 seater sofa bottom cushion cover zip is ripped off. don't know how it happened

The "Report Reviewed" field is highlighted with an orange circle.

## 8 Set the repair to "Furniture repair"

is ripped off, don't know how it

is ripped off, don't know how it

Repair
Action
Appliance Product Recall
Appliance Repair
Appliance Settlement
Breakdown No Action
Cancellation
Cycle Repair
Cycle Replacement
Cycle Replacement & Cycle Repair
Furniture Repair
Furniture Replacement
Gadget Repair

Incident Location

Show Incident Loc ⓘ

## 9 Go to "Estimates"

Claim

Policy Holder	Mr Phillip Mills	Claim Reference ⓘ	442672
External Ref No	ofl-8631601	Notification Date	16/09/2024
Cover Level	Furniture Guard	Delivery Date	12/09/2024
Underwriter	Novus Underwriting		
Vulnerable?	No		

DETAILS	FINANCE	POLICE	PARTIES	ESTIMATES	ESTIMATE PARTS	ESTIMATE LABOUR	PAYMENTS	NOTES	TASKS	DO
Asset	ofl-8631601-1 - OFL / 37043							Repair	Furniture R	
Component								Action	DTA Proces	
Purchase Date										
Registration No.	ofl-8631601-1							Incident Location		
Incident Category	Sofa							Show Incident Loc ⓘ	No	
Incident Type	Accidental Damage									
Incident Detail	Material Issue									

## 10 Click "Add"

16/09/2024

Status: Open  
Position: Referred  
Reason: Assigned for Desktop Assessment  
Handler: Yasmin Ellis  
Next Appointment Date:

+ ADD    DELETE    EXPORT    + ADD CREDIT NOTE

DESCRIPTION	ESTIMATE	PAID	OUTSTANDING	PENDING
First Inspection	£ 48.00	£ 0.00	£ 48.00	£ 0.00

## 11 Choose OFL as the estimate "Type"

Type:

Party:

Description: MB&G Payment Correction

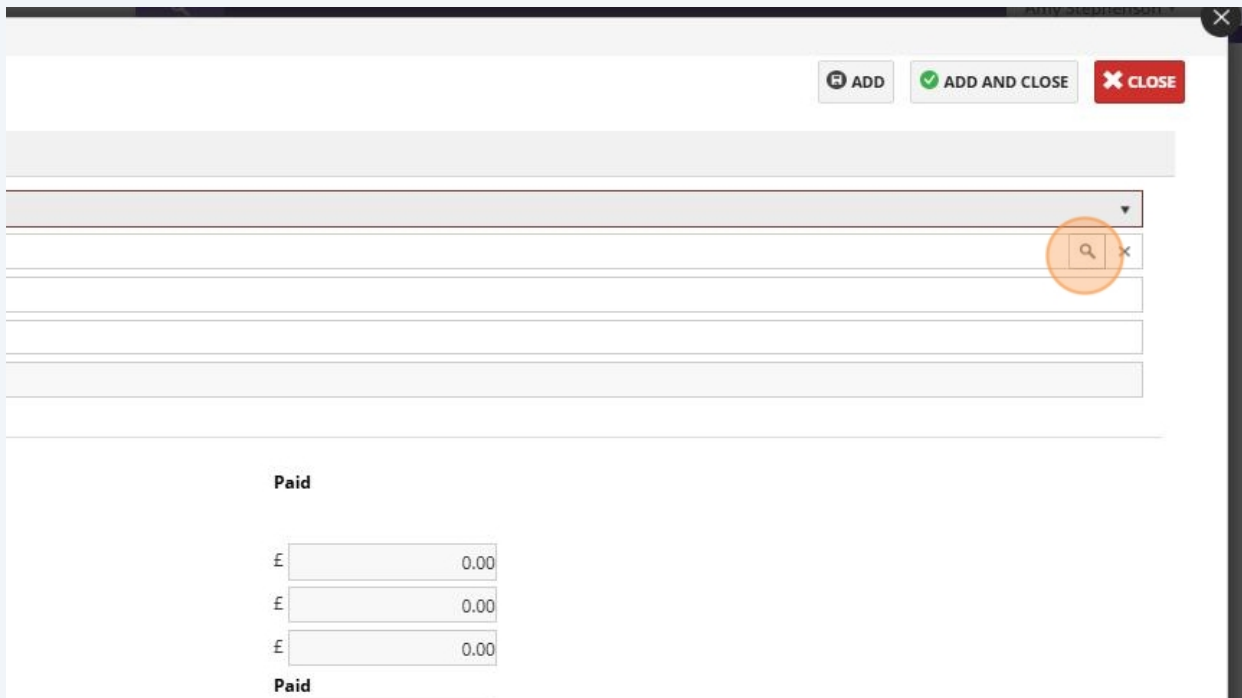
Job Number: OFL

Quote Number:

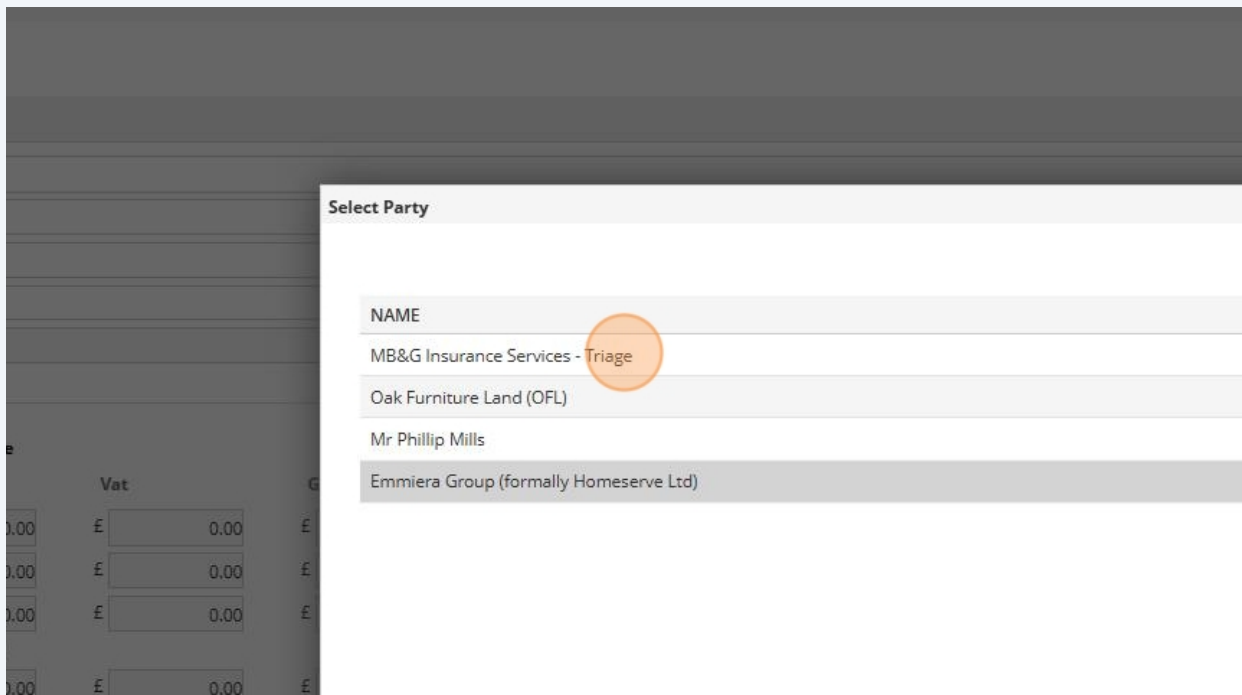
**Breakdown**

Estimate			Payments
Net	Vat	Gross	
£ <input type="text" value="0.00"/>	£ <input type="text" value="0.00"/>	£ <input type="text" value="0.00"/>	£ <input type="text" value="0.00"/>
Applied			Remaining
£ <input type="text" value="0.00"/>	£ <input type="text" value="0.00"/>	£ <input type="text" value="0.00"/>	£ <input type="text" value="0.00"/>

12 Click the magnifying glass



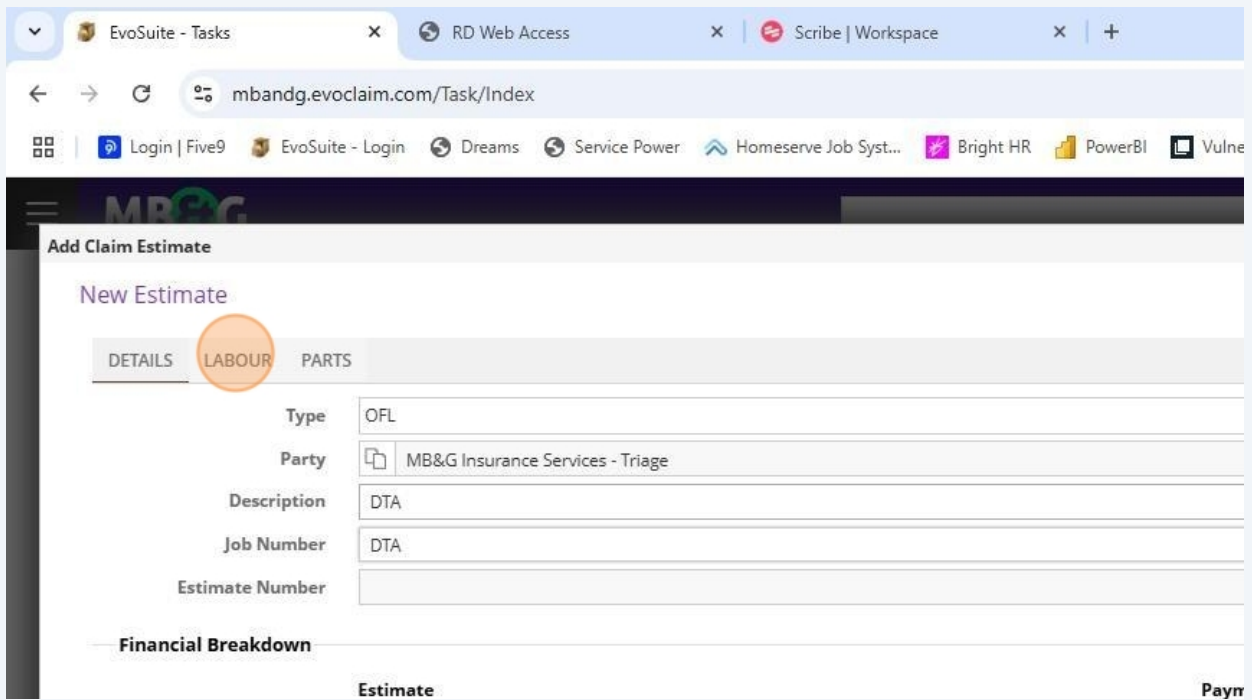
13 Double-click "MB&G Insurance Services Triage"





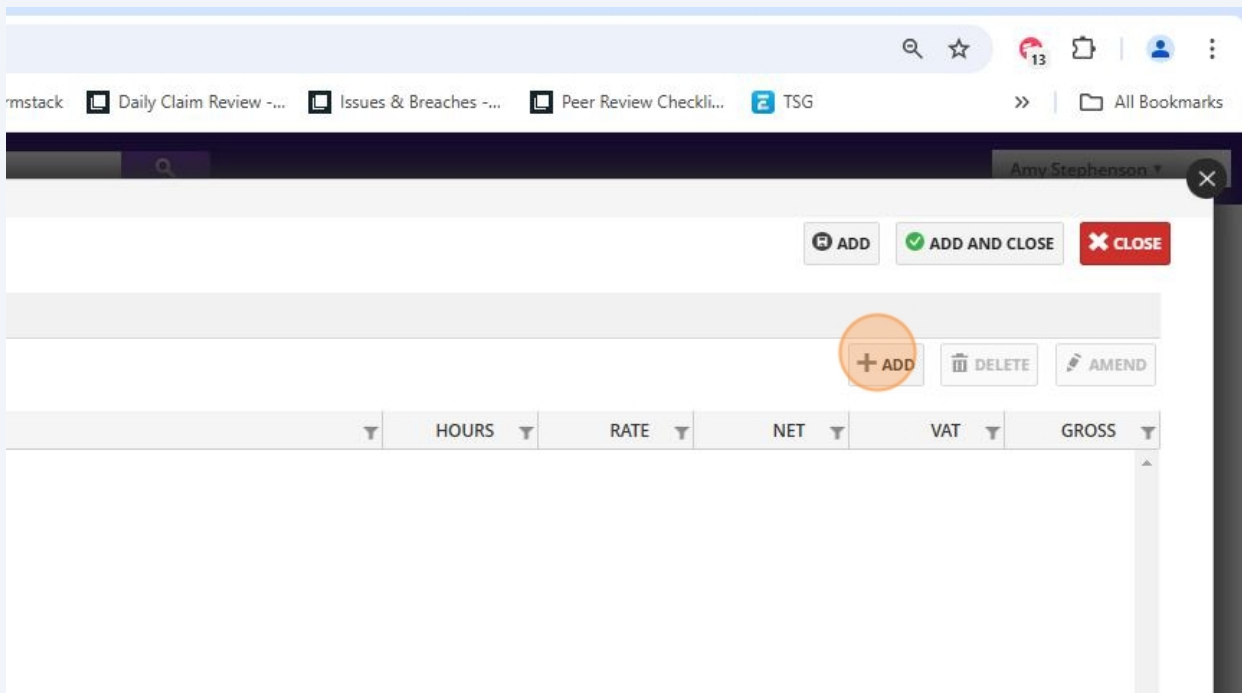
14

Type "DTA" into the estimate "Description" and "Job number" fields, then go to "Labour"

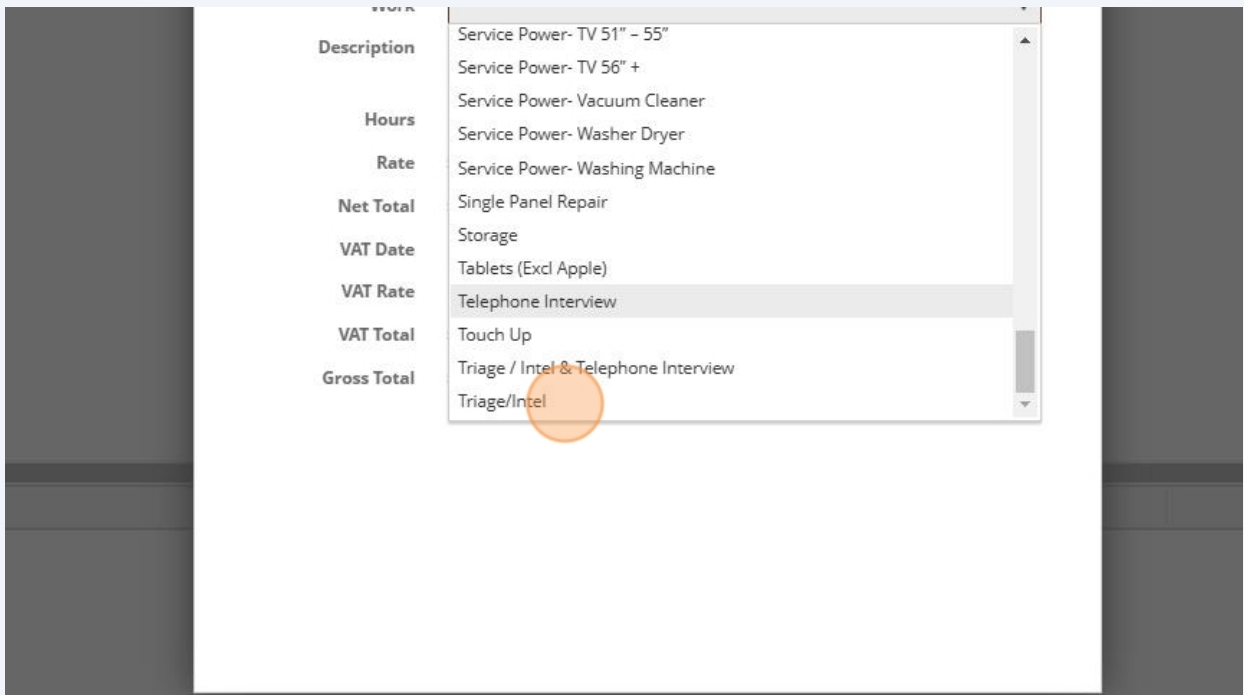


15

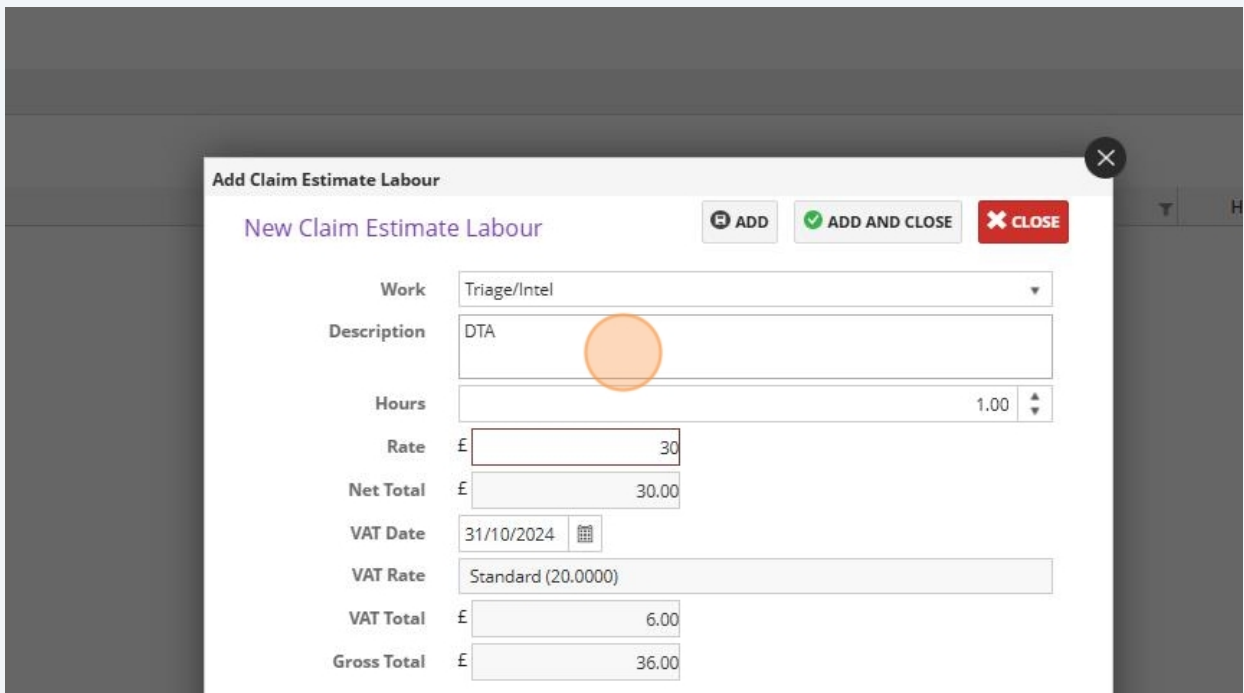
Click "Add"



16 Select "Triage/Intel"



17 Type "DTA" into the description field, set the "Rate" to £30.00



18 Click "Add and close"

**Add Claim Estimate Labour**

**New Claim Estimate Labour** ADD ADD AND CLOSE CLOSE

Work: Triage/Intel

Description: DTA

Hours: 1.00

Rate: £ 30.00

Net Total: £ 30.00

VAT Date: 31/10/2024

VAT Rate: Standard (20.0000)

VAT Total: £ 6.00

Gross Total: £ 36.00

19 Click "Add" to add an estimate for your parts.

Status: Open

Position: Referred

Reason: Assigned for Desktop Assessment

Handler: Yasmin Ellis

Next Appointment Date:

+ ADD DELETE EXPORT + ADD CREDIT NOTE

DESCRIPTION	ESTIMATE	PAID	OUTSTANDING	PENDING
First Inspection	£ 48.00	£ 0.00	£ 48.00	£ 0.00
DTA	£ 36.00	£ 0.00	£ 36.00	£ 0.00

20 Select "OFL" as the estimate type

**Add Claim Estimate**

New Estimate

DETAILS

Type

Party

Description MB&G Payment Correction

Estimate Number OFL

Job Number

Financial Breakdown

	Estimate			Payment
	Net	Vat	Gross	
Sub Total	£ 0.00	£ 0.00	£ 0.00	£
	Applied			Remainir
Repair Excess	£ 0.00	£ 0.00	£ 0.00	£

21 Click the magnifying glass.

mstack Daily Claim Review -... Issues & Breaches -... Peer Review Checkli... TSG All Bookmarks

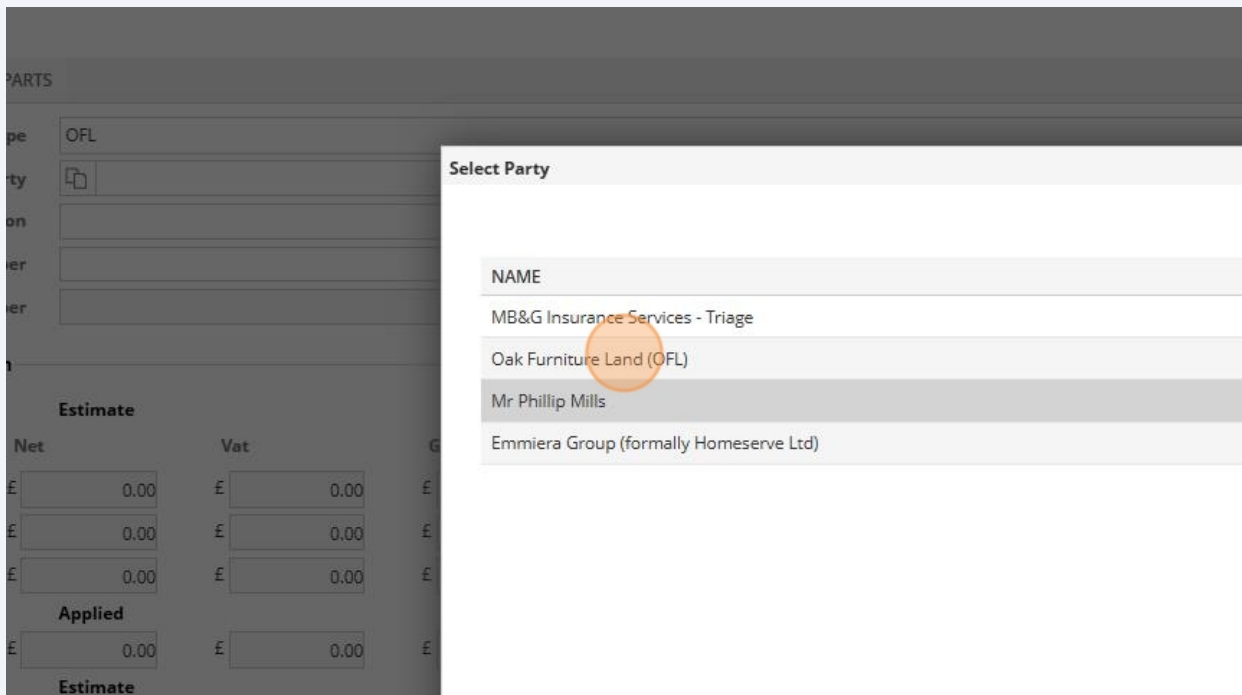
Amy Stephenson

ADD ADD AND CLOSE CLOSE

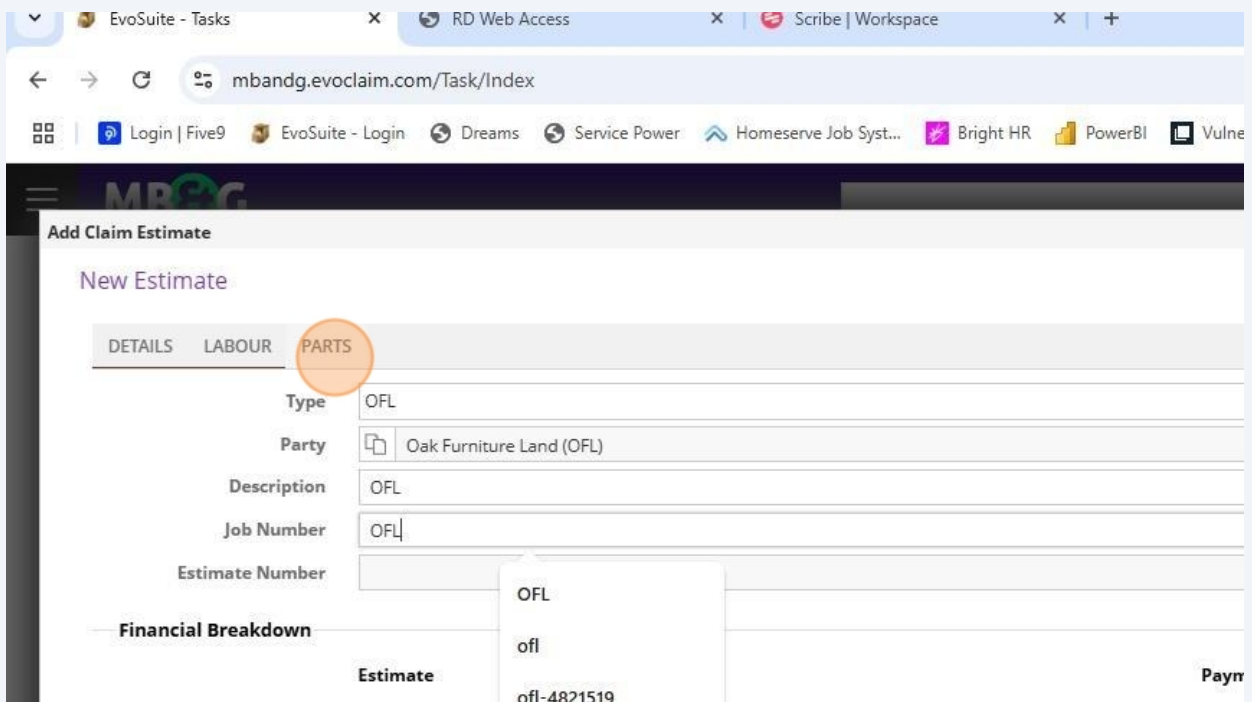
Paid

£ 0.00

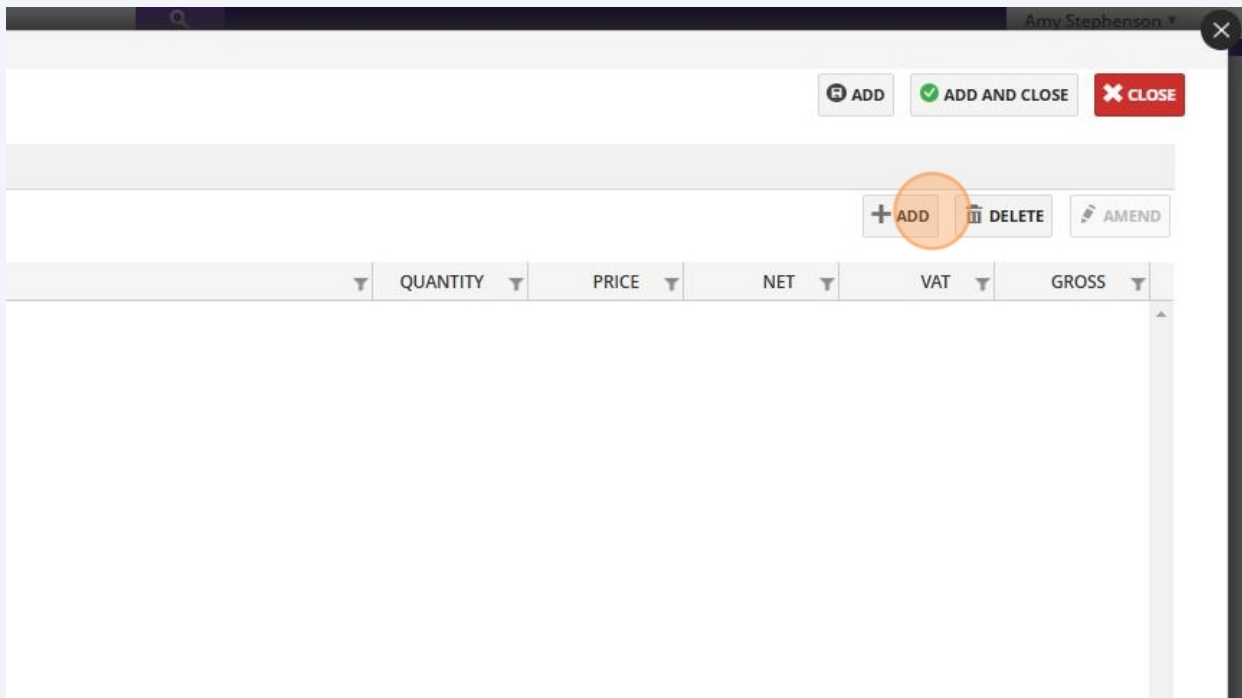
22 Double-click "OFL"



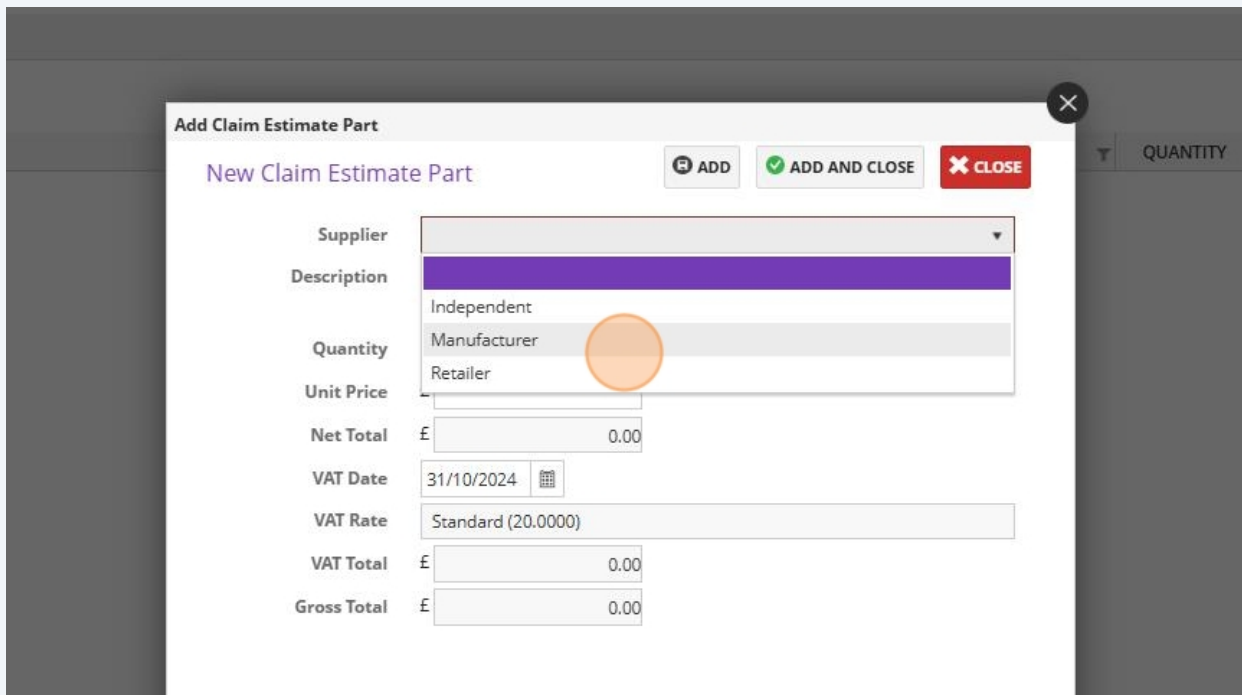
23 Type "OFL" into the description and job number fields, then go to "Parts"



24 Click "Add"



25 Select "Manufacturer" from the supplier drop down



26 Put the parts that you are ordering in the "Description" field

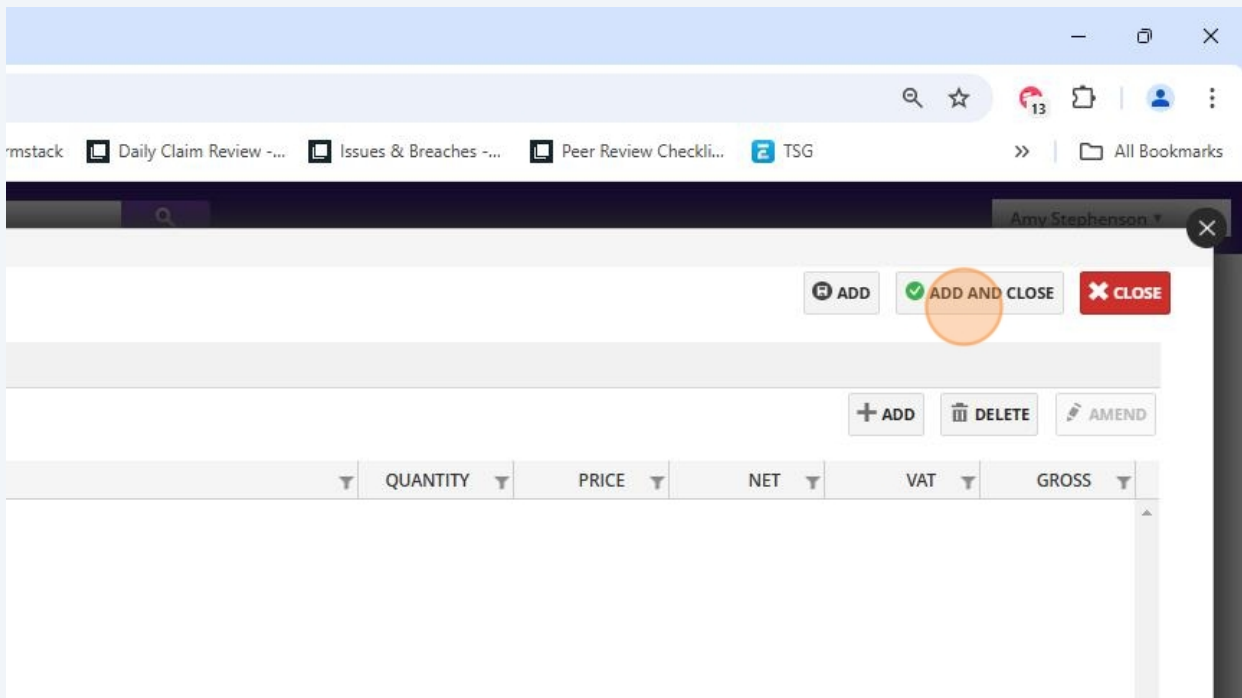
The screenshot shows a dialog box titled "Add Claim Estimate Part" with a close button (X) in the top right corner. Below the title bar, there are three buttons: "ADD" (with a plus icon), "ADD AND CLOSE" (with a checkmark icon), and "CLOSE" (with an X icon). The main form area is titled "New Claim Estimate Part" and contains the following fields:

- Supplier:** A dropdown menu with "Manufacturer" selected.
- Description:** A text input field containing "1 x seat cushion cover", which is highlighted with an orange circle.
- Quantity:** A text input field with "1" and up/down arrow icons.
- Unit Price:** A text input field with "£ 50".
- Net Total:** A text input field with "£ 50.00".
- VAT Date:** A date picker field showing "31/10/2024".
- VAT Rate:** A dropdown menu with "Standard (20.0000)" selected.
- VAT Total:** A text input field with "£ 10.00".
- Gross Total:** A text input field with "£ 60.00".

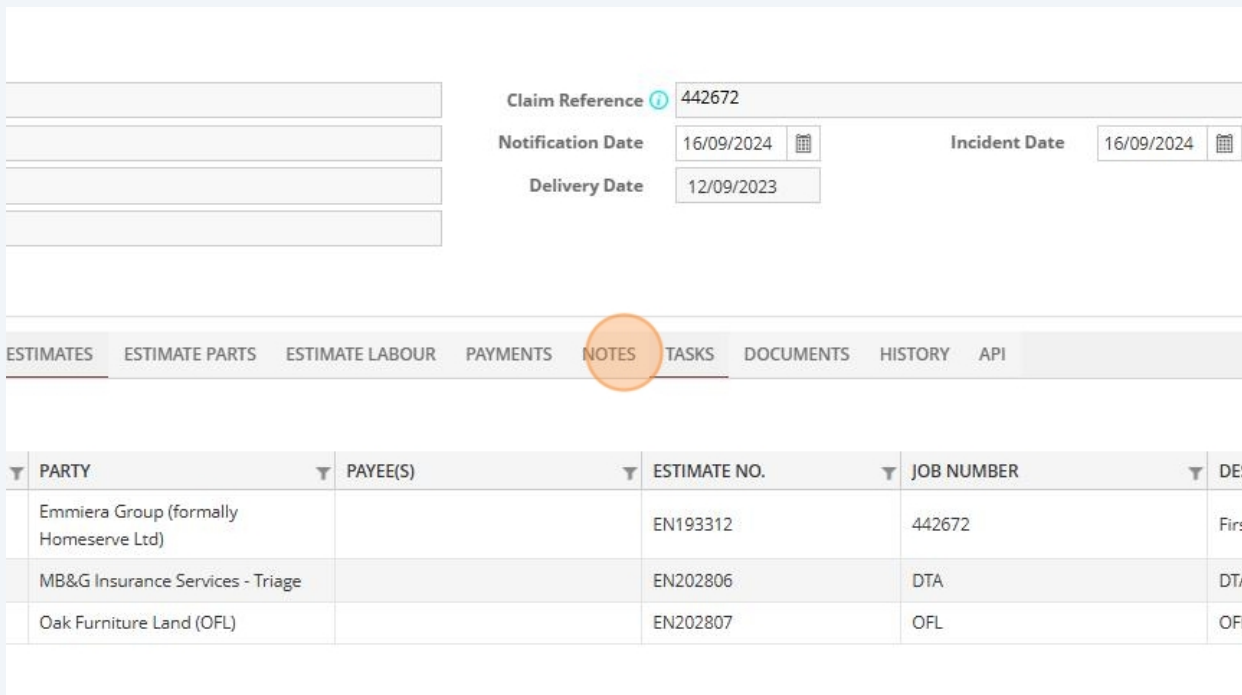
27 Set the unit price as £50 and click "Add and close"

This screenshot is identical to the previous one, showing the "Add Claim Estimate Part" dialog box. In this step, the "ADD AND CLOSE" button is highlighted with an orange circle, indicating the next action to be taken.

28 Click "Add and close" again



29 Click "Notes"





### 30 Click "Add"

<input type="text"/>	<b>Status</b>	Open
<input type="text" value="16/09/2024"/>	<b>Position</b>	Referred
	<b>Reason</b>	Assigned for Desktop Assessment
	<b>Handler</b>	Yasmin Ellis
	<b>Next Appointment Date</b>	<input type="text"/>

**+ ADD** **DELETE**

inated to discuss \*\*\*

ark Street pembroke dock sa6726bl . Same as delivery address . Please can you arrange the rest through trudi please her tell no is 07773036567

unable to change address as postcode too long - Awaiting response.

requesting images to Wife trudi moseley.trudi1@icloud.com

### 31 Add your note then click "Add and close"

**Add Claim Note**

**New Claim Note** **ADD** **ADD AND CLOSE** **CLOSE**

**Date**

**Author**

**Claim Note Type**

1 x seat cushion cover ordered from FG - DTA

ESTIMATE LABOUR

**AUTHOR**

- Yasmin Ellis
- Neil Gray
- Neil Gray
- Neil Gray
- Adam Sutton

Appointment Date

as delivery ad

o long - Awaiting

trudi1@icloud.co

### 32 Click "Tasks"

Claim Reference 442672

Notification Date 16/09/2024 Incident Date 16/09/2024

Delivery Date 12/09/2023

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

	AUTHOR	TYPE	NOTE
4 15:47	Yasmin Ellis		images requested
4 15:43	Neil Gray		*** Trudy Mills nominated to discuss ***
4 15:43	Neil Gray		New address is 71 Park Street pembroke dock sa6726 many thanks .
4 15:44	Neil Gray		Emailed customer - unable to change address as pos

### 33 Click this check-box

Delivery Date 12/09/2023

Reason A

Handler Y

Next Appointment Date

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

	DUE DATE	COMPLETED?	TYPE
	30/10/2024 11:47	<input type="checkbox"/>	Automated Task

### 34 Go to documents

Claim Reference 442672

Notification Date 16/09/2024 Incident Date 16/09/2024

Delivery Date 12/09/2023

RTS ESTIMATE LABOUR PAYMENTS NOTES TASKS DOCUMENTS HISTORY API

Due Date 30/10/2024 11:47 Completed? Automated Task

Saving...

### 35 Click "Email/forward"

Status Open

Position Referred

Reason Assigned for Desktop Assessment

Handler Yasmin Ellis

Next Appointment Date

+ ADD TEMPLATE DOCUMENT VIEW MESSAGE EMAIL CLAIMS FILES (.PDF) EMAIL CLAIMS FILES (.ZIP) EMAIL / FORWARD

Description

RECEIVED BY	SENDER	RECEIVED	ATTACHMENT	EMAIL SUBJECT	CATEGORY
iray	OFL@mbginsurance.com	30/10/2024 11:47	<input type="checkbox"/>	MB&G Insurance - Your Oak Furnitureland Claim - Assessing Claim	Email Inbound
				MB&G Insurance - Your Oak Furnitureland Claim -	

### 36 Double-click "Product Part Request Form"

TEMPLATE NAME	CATEGORY NA...
OFL- Parts Delivery Timescale 2 Weeks	Email Outbound
OFL- Parts Delivery Timescale 4 Weeks	Email Outbound
OFL- Parts Delivery Timescale 6 Weeks	Email Outbound
OFL- Parts Delivery Timescale 8 Weeks	Email Outbound
OFL- Parts Ordered-Delivery to Customer-Large Part-Customer Update	Email Outbound
OFL- Parts Ordered-Delivery to Customer-Small Part-Customer Update	Email Outbound
OFL- Parts Received	Email Outbound
OFL- Product Part Request Form - Non Workflow	Email Outbound
OFL- Product Under 12 Months - Referred to OFL - Non Workflow	Email Outbound
OFL- Rejection Reason	Email Outbound
OFL- Repair Complete	Email Outbound
OFL- Replacement Delivery Timescales	Email Outbound
OFL- Replacement Discontinued	Email Outbound
OFL- Replacement No Inspection	Email Outbound
OFL- Tracking Information Provided - Non Workflow	Email Outbound
OFL-Accidental Damage Assessment Required	Email Outbound

### 37 Put the email address "furnitureguard@ofl.co.uk" in the "Forward to" box

Send / Forward

Sender: OFL@mbginsurance.com

Forward To: tygreplace@dreams.co.uk

CC:

Subject: Claim 442672 - P

Attachments: No attachments available

tygreplace@dreams.co.uk

furnitureguard@ofl.co.uk

supplierinspections@dreams.c...

customerservices@kaydian.co....

tygqueries@dreams.co.uk

sales@furmanacgroup.com

Paragraph

**Oak**  
furnitureland

**Product and parts replacement Request Form**

38 Paste the parts you need in the "Parts / Product Required" field

The screenshot shows a form with a table structure. The first table has two rows: 'Mobile Tel Number' with value '07535 744698' and 'Email Address' with value 'moseley.trudi1@icloud.com'. Below this is a larger table with four rows: 'Original Product Description' with value 'Make:OFL Model: 37043 Milner 4 Seater Sofa in Granite Fabric\*MLN004-FND-GRT-SMO', 'Parts / Product Required' (highlighted with an orange circle), 'Reason / Fault', and 'Requested by' with value 'Yasmin Ellis'. A footer note reads: 'The content of this communication contains confidential information. If you receive this message in error, delete the message and please contact us. Any distribution is strictly prohibited.'

39 Click "send"

The screenshot shows a form with a 'SEND' button highlighted by an orange circle. The form includes a text area with a green checkmark, a field containing '631601', and a rich text editor with a toolbar showing '10 pt', 'A', a color picker, 'Paragraph', and alignment options. On the right side, there are buttons for 'SAVE', 'SAVE AND CLOSE', and 'CLOSE'. Below these are sections for 'FILES (.PDF)' and 'EMAIL CLAIMS FILES', and a dropdown menu for 'EMAIL SUBJECT'.

## 40 Go to "Tasks"

Claim Reference 442672

Notification Date 16/09/2024 Incident Date 16/09/2024

Delivery Date 12/09/2023

TASKS

+ ADD DELETED EXPORT ADD TEMPLATE DOCUMENT

Category

Search Reset Search

FILE NAME	CREATED	CREATED BY	SENDER
Claim 442672 - Phillip Mills - ofl-8631601.eitrem1	31/10/2024 07:35	Amy Stephenson	
ireland Claim - Assessing MB&G Insurance - Your Oak Furnitureland Claim - Assessing	30/10/2024 11:47	Neil Gray	OFl@mbainsur

## 41 Change the claim status to "Accepted"

SAVE SAVE AND CLOSE CLOSE PRINT EMAIL

Status Open

Position Referred

Reason

Handler

Next Appointment Date

Accepted Referred Rejected Reopened

+ ADD DELETED EXPORT

ID?	TYPE
	Automated Task

## 42 Change the claim reason to "Parts Requested to Customer"

Appointment Date: 16/09/2024

Position: Accepted

Reason: **Parts Requested to Customer**

Handler: Yasmin Ellis

Next Appointment Date: [Empty]

EXPORT

ID?	TYPE
	Automated Task

1 - 1 of 1 items

## 43 Change the handler name to your name

Time - Formstack | Daily Claim Review - ... | Issues & Breaches - ... | Peer Review Checkli... | TSG

Amy Stephenson

SAVE SAVE AND CLOSE CLOSE PRINT EMAIL

Status: Open

Appointment Date: 16/09/2024

Position: Accepted

Reason: **Parts Requested to Customer**

Handler: **Yasmin Ellis**

Next Appointment Date: [Empty]

PI

+ ADD DELETE EXPORT

ID?	TYPE
	Automated Task

44 Click "Save and close"

