

【Applications Notes】

Claims Management for a Consumer Appliances Retailer

Problem and solution

■ Current operation

This nationwide consumer appliances retailer manages customer claims with paper-based reports via fax. When a claim occurs, a standard form is completed in the field and then faxed to headquarters. At headquarters, staff inputs essential information to a central database and then files the fax hardcopy.

■ Problem

Attempting to manage paper-based claims information in this way is inefficient and inaccurate. Also, since the various branch offices cannot easily share the claim information, they often submit duplicate claims, which can result in serious confusion and customer satisfaction issues.

■ Solution

Lucida Insight™ publishes a standard claims form securely on the Web. Claims records are now freely shared by branch offices and automatically uploaded to a central database for on-going reference.

■ Result

The claims information formerly managed as faxed copies and manual data entry is now handled as real-time, Web-enabled database information. Web-based claims information shared among branch offices now proactively prevents duplicate claims and resulting customer satisfaction issues.

Sample spreadsheet

- Claim report sheet (branch use)

This screenshot shows a spreadsheet interface for a branch office. The spreadsheet is titled "Claims Local" and contains several data entry fields for claim information, including "Product Code", "Search Home", "Copy", "Date", "Category", "State", "Inventory", "Ref. ID", "Inspection", "Other", "Merchandise", "Manufacturer", "Quantity", and "Status/Comments. E-mail generated by the collector".

- HQ aggregation sheet

This screenshot shows a spreadsheet interface for headquarters aggregation. The spreadsheet is titled "HQ Aggregation" and contains a detailed table of claim records. The table has columns for "Area ID", "Internet ID", "Branch Name", "Last Date", "Customer", "Date Entered", "Trade Inventory", "Inventory Reported", "User", "Manufacturer", "Quantity", "Status", and "Name".

Area ID	Internet ID	Branch Name	Last Date	Customer	Date Entered	Trade Inventory	Inventory Reported	User	Manufacturer	Quantity	Status	Name
6	CL0000	CL0000	1/1/00	CL0000	1/1/00				CL0000	1		
7	CL0001	CL0001	1/1/00	CL0001	1/1/00				CL0001	1		
8	CL0002	CL0002	1/1/00	CL0002	1/1/00				CL0002	1		
9	CL0003	CL0003	1/1/00	CL0003	1/1/00				CL0003	1		
10	CL0004	CL0004	1/1/00	CL0004	1/1/00				CL0004	1		
11	CL0005	CL0005	1/1/00	CL0005	1/1/00				CL0005	1		
12	CL0006	CL0006	1/1/00	CL0006	1/1/00				CL0006	1		
13	CL0007	CL0007	1/1/00	CL0007	1/1/00				CL0007	1		
14	CL0008	CL0008	1/1/00	CL0008	1/1/00				CL0008	1		
15	CL0009	CL0009	1/1/00	CL0009	1/1/00				CL0009	1		
16	CL0010	CL0010	1/1/00	CL0010	1/1/00				CL0010	1		
17	CL0011	CL0011	1/1/00	CL0011	1/1/00				CL0011	1		
18	CL0012	CL0012	1/1/00	CL0012	1/1/00				CL0012	1		
19	CL0013	CL0013	1/1/00	CL0013	1/1/00				CL0013	1		
20	CL0014	CL0014	1/1/00	CL0014	1/1/00				CL0014	1		
21	CL0015	CL0015	1/1/00	CL0015	1/1/00				CL0015	1		
22	CL0016	CL0016	1/1/00	CL0016	1/1/00				CL0016	1		
23	CL0017	CL0017	1/1/00	CL0017	1/1/00				CL0017	1		
24	CL0018	CL0018	1/1/00	CL0018	1/1/00				CL0018	1		
25	CL0019	CL0019	1/1/00	CL0019	1/1/00				CL0019	1		
26	CL0020	CL0020	1/1/00	CL0020	1/1/00				CL0020	1		
27	CL0021	CL0021	1/1/00	CL0021	1/1/00				CL0021	1		
28	CL0022	CL0022	1/1/00	CL0022	1/1/00				CL0022	1		
29	CL0023	CL0023	1/1/00	CL0023	1/1/00				CL0023	1		
30	CL0024	CL0024	1/1/00	CL0024	1/1/00				CL0024	1		
31	CL0025	CL0025	1/1/00	CL0025	1/1/00				CL0025	1		
32	CL0026	CL0026	1/1/00	CL0026	1/1/00				CL0026	1		
33	CL0027	CL0027	1/1/00	CL0027	1/1/00				CL0027	1		
34	CL0028	CL0028	1/1/00	CL0028	1/1/00				CL0028	1		
35	CL0029	CL0029	1/1/00	CL0029	1/1/00				CL0029	1		
36	CL0030	CL0030	1/1/00	CL0030	1/1/00				CL0030	1		
37	CL0031	CL0031	1/1/00	CL0031	1/1/00				CL0031	1		
38	CL0032	CL0032	1/1/00	CL0032	1/1/00				CL0032	1		
39	CL0033	CL0033	1/1/00	CL0033	1/1/00				CL0033	1		
40	CL0034	CL0034	1/1/00	CL0034	1/1/00				CL0034	1		
41	CL0035	CL0035	1/1/00	CL0035	1/1/00				CL0035	1		
42	CL0036	CL0036	1/1/00	CL0036	1/1/00				CL0036	1		
43	CL0037	CL0037	1/1/00	CL0037	1/1/00				CL0037	1		
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46	CL0040	CL0040	1/1/00	CL0040	1/1/00				CL0040	1		
47	CL0041	CL0041	1/1/00	CL0041	1/1/00				CL0041	1		
48	CL0042	CL0042	1/1/00	CL0042	1/1/00				CL0042	1		
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56	CL0050	CL0050	1/1/00	CL0050	1/1/00				CL0050	1		
57	CL0051	CL0051	1/1/00	CL0051	1/1/00				CL0051	1		
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59	CL0053	CL0053	1/1/00	CL0053	1/1/00				CL0053	1		
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63	CL0057	CL0057	1/1/00	CL0057	1/1/00				CL0057	1		
64	CL0058	CL0058	1/1/00	CL0058	1/1/00				CL0058	1		
65	CL0059	CL0059	1/1/00	CL0059	1/1/00				CL0059	1		
66	CL0060	CL0060	1/1/00	CL0060	1/1/00				CL0060	1		
67	CL0061	CL0061	1/1/00	CL0061	1/1/00				CL0061	1		
68	CL0062	CL0062	1/1/00	CL0062	1/1/00				CL0062	1		
69	CL0063	CL0063	1/1/00	CL0063	1/1/00				CL0063	1		
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72	CL0066	CL0066	1/1/00	CL0066	1/1/00				CL0066	1		
73	CL0067	CL0067	1/1/00	CL0067	1/1/00				CL0067	1		
74	CL0068	CL0068	1/1/00	CL0068	1/1/00				CL0068	1		
75	CL0069	CL0069	1/1/00	CL0069	1/1/00				CL0069	1		
76	CL0070	CL0070	1/1/00	CL0070	1/1/00				CL0070	1		
77	CL0071	CL0071	1/1/00	CL0071	1/1/00				CL0071	1		
78	CL0072	CL0072	1/1/00	CL0072	1/1/00				CL0072	1		
79	CL0073	CL0073	1/1/00	CL0073	1/1/00				CL0073	1		
80	CL0074	CL0074	1/1/00	CL0074	1/1/00				CL0074	1		
81	CL0075	CL0075	1/1/00	CL0075	1/1/00				CL0075	1		
82	CL0076	CL0076	1/1/00	CL0076	1/1/00				CL0076	1		
83	CL0077	CL0077	1/1/00	CL0077	1/1/00				CL0077	1		
84	CL0078	CL0078	1/1/00	CL0078	1/1/00				CL0078	1		
85	CL0079	CL0079	1/1/00	CL0079	1/1/00				CL0079	1		
86	CL0080	CL0080	1/1/00	CL0080	1/1/00				CL0080	1		
87	CL0081	CL0081	1/1/00	CL0081	1/1/00				CL0081	1		
88	CL0082	CL0082	1/1/00	CL0082	1/1/00				CL0082	1		
89	CL0083	CL0083	1/1/00	CL0083	1/1/00				CL0083	1		
90	CL0084	CL0084	1/1/00	CL0084	1/1/00				CL0084	1		
91	CL0085	CL0085	1/1/00	CL0085	1/1/00				CL0085	1		
92	CL0086	CL0086	1/1/00	CL0086	1/1/00				CL0086	1		
93	CL0087	CL0087	1/1/00	CL0087	1/1/00				CL0087	1		
94	CL0088	CL0088	1/1/00	CL0088	1/1/00				CL0088	1		
95	CL0089	CL0089	1/1/00	CL0089	1/1/00				CL0089	1		
96	CL0090	CL0090	1/1/00	CL0090	1/1/00				CL0090	1		
97	CL0091	CL0091	1/1/00	CL0091	1/1/00				CL0091	1		
98	CL0092	CL0092	1/1/00	CL0092	1/1/00				CL0092	1		
99	CL0093	CL0093	1/1/00	CL0093	1/1/00				CL0093	1		
100	CL0094	CL0094	1/1/00	CL0094	1/1/00				CL0094	1		