

Agreement Renewals

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Overview

Your licencing must include one of the agreement modules (Rental, Maintenance, or Service) and Agreement Reviews to take advantage of these features.

This manual covers only the specific features added in NCompass Advanced Retail version 11.07 and onwards. For more guidance on setting up agreements, please refer to your main user guide or your agreements guide.

The new agreement renewal features in NCompass Advanced Retail version 11.07 and above allow you to set a contract version against the agreement. This can be applied to Rental, Maintenance, HP, and Service agreements, allowing you to reference it back to the original paperwork version.

Setting renewal and review dates allows the automation of reminder emails to the customer and warns system operators about upcoming agreements that require action. This is done by both pushing a reminder into NCompass Today and automatically entering the agreement into Agreement Reviews.

NCompass Today will now show details of any agreements that are due for renewal soon or have charges due for review soon. You can modify these settings in the following sections:

- **Agreements > NCompass Today - Show Renewals Due in Days** (default 100 days)
- **Agreements > NCompass Today - Show Charge Reviews Due in Days** (default 14 days)

Configuration Options - Force version Selection

When setting up new agreements or editing existing ones, you can force the selection of a contract version. To do this, you need to set the configuration option 'Require Contract Version for Agreements'.

This can be set in Tools > Configuration.

Type 'Require Contract Version for Agreements' in the search box, tick the 'search all' checkbox, and click 'Search'.

- Set globally to YES if you'd like to force the selection of a contract version.
- Set globally to NO if you don't want to force the selection.

Configuration Options - NCompass Today Notifications

NCompass Today Notifications - Charge Review:

1. Navigate to **Tools > Configuration**.
2. In the search box, type '**NCompass Today - Show Charge Reviews Due in Days**'.
3. Tick the **Search All** checkbox.
4. Click **Search**.
5. Set the number of days in advance for the charge review warning.
 - Setting the number of days to **Zero** will disable the advanced warning.
 - Note: **Due today** and **overdue warnings** will still be displayed.

NCompass Today Notifications - Show When Renewals Are Due:

1. Navigate to **Tools > Configuration**.
2. In the search box, type '**NCompass Today - Show Renewals Due in Days**'.
3. Tick the **Search All** checkbox.
4. Click **Search**.
5. Set the number of days in advance for the renewal warning.
 - Setting the number of days to **Zero** will disable the advanced warning.
 - Note: **Due today** and **overdue warnings** will still be displayed.

Configuration Options - Salesperson For Agreement Renewal Reviews

Setting Salesperson for Agreement Renewal Reviews

1. Navigate to **Tools > Configuration**.
2. In the search box, type '**Salesperson for Agreement Renewal Reviews**'.
3. Tick the **Search All** checkbox.
4. Click **Search**.
5. Set the required salesperson globally.
 - If not set, the review will default to the salesperson of the Agreement.
 - This option is used when an automatic review fails to send an email to the customer due to a missing email address or an error in sending.

Setting up contract Versions

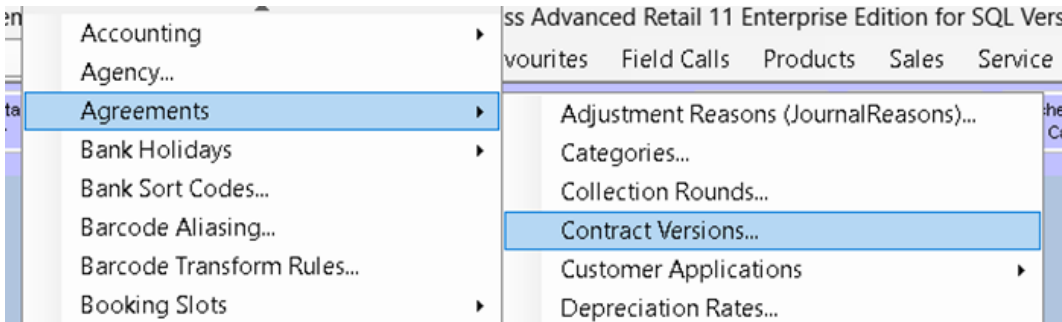
The contract **'Version'** allows the agreement to be tagged with the version of the originally signed agreement.

For example:

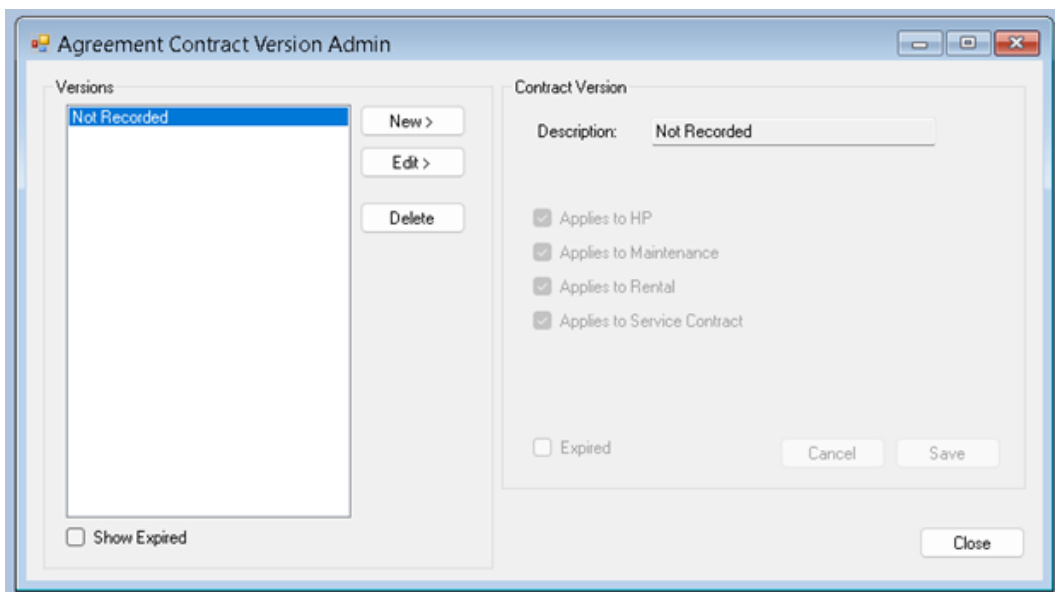
- **'Pre 2020'**
- **'36-month fixed term paperwork V1'**
- **'36-month fixed term paperwork V2'**

Adding and amending Contract Versions

1. Navigate to **Administration > Agreements > Contract Versions**

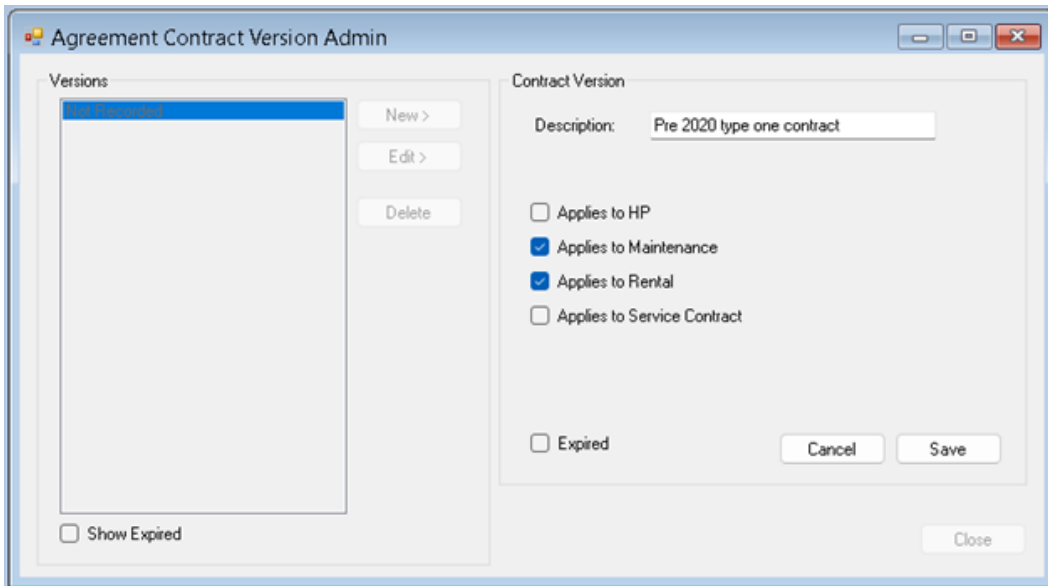


This Admin window allows you to view, add, or amend contract versions. You can also mark a contract version as **'expired'**.



Adding a New Contract Version

1. Click **'New'**.
2. Enter a name for the contract version.
3. Select the type of agreements this version applies to.
4. Click **'Save'**.



Editing an Existing Contract Version

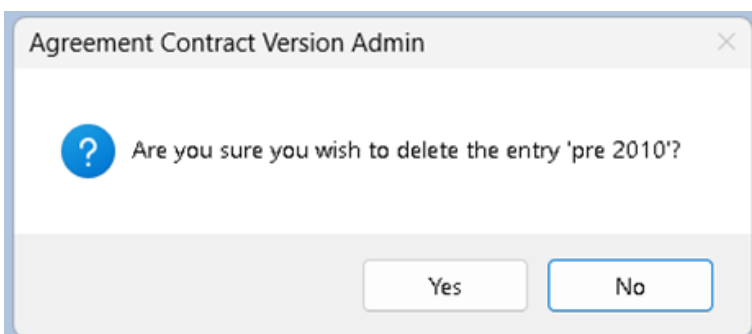
1. Select the version you want to edit and click **'Edit'**.
2. You can:
 - Change the name.
 - Change the agreement type it applies to.
 - Mark the entry as expired.
3. Once you have completed your changes, click **'Save'**.

Note: Changing the entry name will apply to all agreements where this version is set.

Deleting a Contract Version

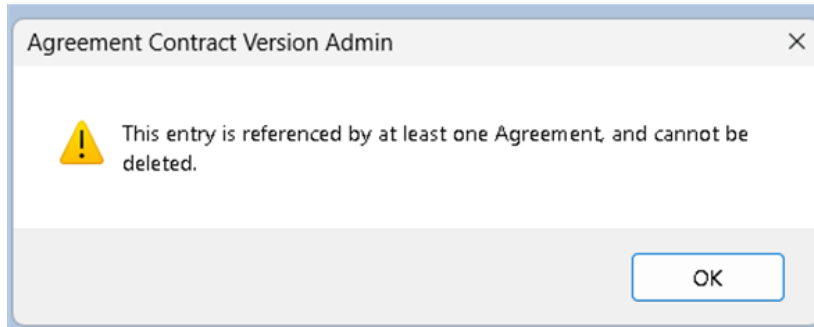
1. Select the version you want to delete and click **'Delete'**.
2. Click **'Yes'** to confirm the deletion.

Note: If the entry is in use on any agreements, you will be blocked from deleting it.



Marking a Contract Version as Expired

If an entry is in use on an agreement but you don't want it to be used in the future, you should mark the entry as expired:



1. Click the **'Expired'** checkbox.
2. Click **'Save'**.

Adding a Contract Version to an Agreement

1. Start your agreement in the normal way by selecting **'New XXX Agreement'** from the Agreements menu.

Existing Agreements

1. Find your agreement by either:
 - Searching for the customer with **'Customer Enquiry'** from the Customers menu (or pressing **F3**).
 - Selecting **'Agreement Explorer'** from the Agreements menu (or pressing **F5**) and entering the agreement number.
2. Press **'Edit Agreement'**.

Mr D Pinder, 107 High Street, Alfreton, DE55 7HL - Edit Agreement

Details | Renewal Settings

Branch: Sevenoaks + ☐ Show Expired

Sold by: Amazon Sales + ☐ Show Expired

Edited by: Amazon Sales + ☐ Show Expired

Start Date: 26/02/2025 ☐ End Date:

Date of changes: 26/02/2025

☐ Force subsequent charges on DOM:

Agreement

Agreement No: R2002 ☐ Rent To Own

Agreement Type: Rental

Agreement Category: Standard

☐ Block Discounted:

Contract Version: pre 2010
Not Recorded
pre 2010

Customer

Customer: Mr D Pinder, 107 High Street, Alfreton, DE55 7HL

Marketing source: Radcom Magazine

Pick Customer... Show Details...

Installation Address

☐ Use Install Address:

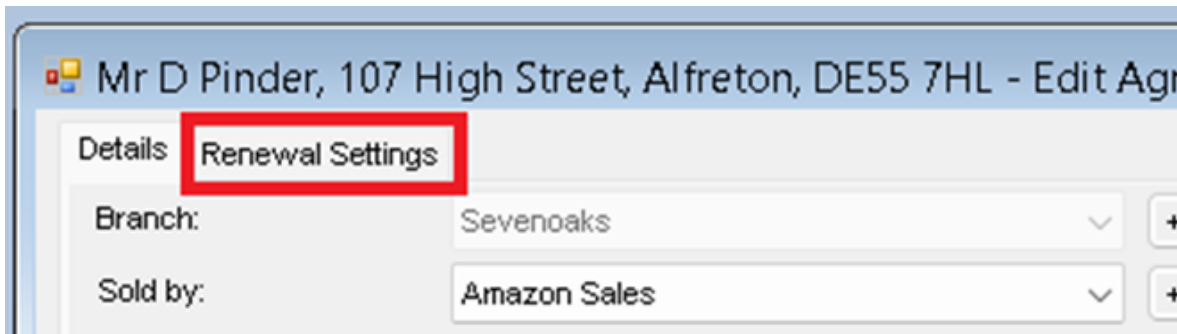
Selecting the Contract Version

1. Select the contract version from the drop-down selection box.
 - If you're editing an existing agreement, click **'Next'**, **'Next'**, **'Save'**.
 - For new agreements, ensure you have selected the other required fields (please see your agreement guide) and then click **'Next'** as normal.

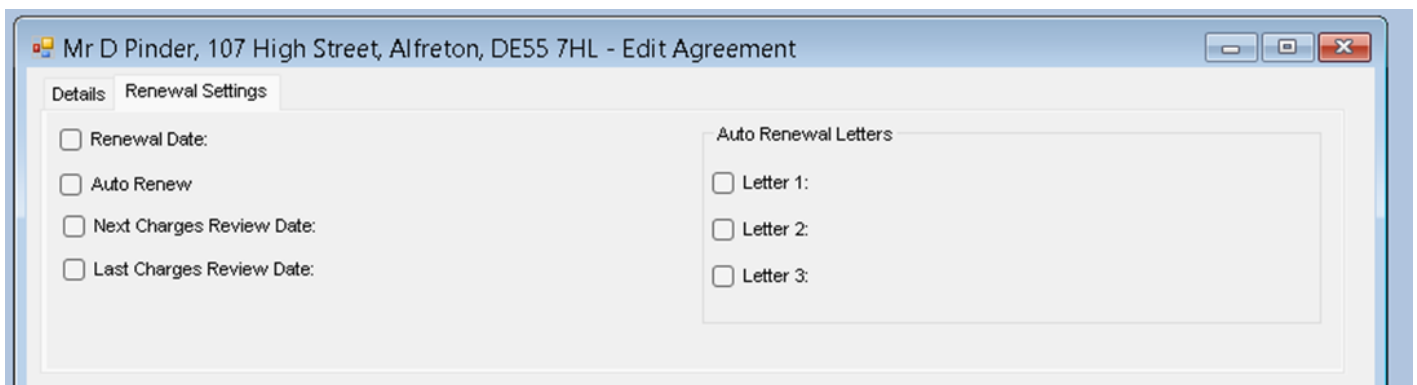
Renewals

Renewal Date

There is a new tab on the agreement setup window (agreement step 1).



Clicking the tab flips the top part of the window to show the new Renewals section.



To set a renewal date:

- Click the checkbox and enter the renewal date or click the calendar icon for a drop-down date picker.

Mr D Pinder, 107 High Street, Alfreton, DE55 7HL - Edit Agreement

Details | **Renewal Settings**

☒ Renewal Date: 04/02/2025

☐ Auto Renew

☐ Next Charges Review Date:

☐ Last Charges Review Date:

Agreement No: R2002

February 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

Today: 26/02/2025

Auto Renew

- To set an automatic renewal:
 - Click the checkbox.
 - Set an extend-by number and a period.

Note: When auto renew is set, the system will automatically move the renewal date on by the selected time period when the agreement reaches its renewal date.

Mr D Pinder, 107 High Street, Alfreton, DE55 7HL - Edit Agreement

Details | **Renewal Settings**

☐ Renewal Date:

☒ Auto Renew

Extend By: 36

☐ Next Charges Review Date:

☐ Last Charges Review Date:

Years
Months
Weeks
Days

Agreement No: R2002

Auto Renew Letters

- The system can send up to three different email letters to the customer. They are sent automatically at a set number of days before the renewal date, and once sent, an entry will appear in Agreement Explorer.
- The renewal letters are sent as emails from the system's email template system and must be set up in advance of adding the letter to the agreement.
- To enable and configure the letters:
 - Click the checkbox to enable letter one.

- Select the letter template from the drop-down list of templates.
- Enter the number of days in advance of the renewal date to send this letter.
- Repeat for letters two and three if required.

The screenshot shows a window titled 'Agreement'. Inside, there is a section labeled 'Auto Renewal Letters'. It contains three rows for configuring letters:

- ☒ Letter 1: Renewal Invitation Send 90 days before
- ☐ Letter 2:
- ☐ Letter 3:

Note: If an agreement fails to send a configured renewal notification, it could be due to:

- An error sending the email to the customer.
- The customer not having an email address set.

NCompass will automatically create an Agreement Review of type *Renewal Requiring Attention*. If an open review already exists of this type, a duplicate is not created.

Next Charge Review Date

1. This is the date when you next need to review the current rate on the agreement.
2. To set the next charge review date:
 - Click the checkbox and enter the review date or click the calendar icon for a drop-down date picker.

The screenshot shows a window titled 'Mr D Pinder, 107 High Street, Alfreton, DE55 7HL - Edit Agreement'. The 'Renewal Settings' tab is active. It contains the following settings:

- ☒ Renewal Date: 04/02/2025
- ☐ Auto Renew
- ☐ Next Charges Review Date:
- ☐ Last Charges Review Date:

A date picker calendar is open, showing February 2025. The date 26 is selected. Below the calendar, it says 'Today: 26/02/2025'. At the bottom of the window, the 'Agreement No:' is R2002.

This will trigger an automatic review when the date is reached.

Last Charge Review Date

1. This allows you to record the date the last charges were reviewed.
2. To set the last charge review date:
 - Click the checkbox and enter the review date or click the calendar icon for a drop-down date picker.

Mr D Pinder, 107 High Street, Alfreton, DE55 7HL - Edit Agreement

Details | **Renewal Settings**

☒ Renewal Date: 04/02/2025

☐ Auto Renew

☐ Next Charges Review Date:

☒ Last Charges Review Date:

February 2025

Mon	Tue	Wed	Thu	Fri	Sat	Sun
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

Today: 26/02/2025

Agreement

Agreement No: R2002

Agreements Detailed Enquiry

Finding Agreements by Renewal Date

To find agreements that by renewal date go to:

Navigate to **Agreements > Detailed Enquiry**.

Filters

There are a range of filters available, including a new filter by renewal date:

Next Charges Review:	☒ Not Set	☒ Is Set	☐ From	26/02/2025	☐ To	26/02/2025
Last Charges Review:	☒ Not Set	☒ Is Set	☐ From	26/02/2025	☐ To	26/02/2025
Renewal Date:	☐ Not Set	☒ Is Set	☒ From	26/02/2025	☒ To	26/02/2025

- **Not set** – Include agreements with no renewal date set.
- **Is set** – Include agreements that have a renewal date set.
- **From** – Include only agreements from this date.
- **To** – Include only agreements before this date.

Filtering by Pending Reviews

You can also filter by agreements that have pending reviews:

On Open Review?	
☒ Yes	☐ No
☒ Choose Review Type	Renewal Requiring Attention

1. Check **'Yes'**.
2. Select **'Renewals Requiring Attention'** as the review type.
3. Click **'Search'**.

Detailed Enquiry



Search has returned 5 records

☐ Branch

☐ Current Balance Between and

☐ Date Last Paid On or after and on or before

☐ Periods in Arrears Between and

☐ Amount in Arrears Between and

☐ Agreement Category

☐ Agreement Type

☐ Agreement Number

Payment Type ☐ Include ☐ ExcludePayment Method ☐ Include ☐ Exclude

On Open Review?

☒ Yes ☐ No ☐ All☒ Choose Review Type

Current Status

☒ Active ☐ Expired ☐ All

Payment Status

Next Charges Review: ☒ Not Set ☒ Is Set ☐ From To Last Charges Review: ☒ Not Set ☒ Is Set ☐ From To Renewal Date: ☒ Not Set ☒ Is Set ☒ From To Contains Product ☐ Product: <Please select a Product>

Pick Product...

Search

Agreements - Total of Current Balances = £319.13 Records Selected: 1 : Hire purchase agreements are not included with Product/Department filter set

Agreement No	Review Count	Missed Payments	Missed Payments Value	Next Payment Due	Current Balance	Customer	Agreement Type
C2000	0	0	£0.00	05/10/2024	£365.13	Mr D Pinder, 107 High Str...	Hire Purchase
84604	0	3	£30.00	01/04/2024	£30.00	Mrs Adams, 123 Selwin St...	Rental
R2002	0	0	£0.00	26/02/2025	£24.00	Mr D Pinder, 107 High Str...	Rental
R2001	0	0	£0.00	20/04/2025	£30.00	Mr D Pinder, 107 High Str...	Rental
R2000	0	0	£0.00	18/08/2025	£70.00	Mr D Pinder, 107 High Str...	Rental

Customer History...

View in Agreement Explorer...

Take Payment...

Batch Automatic Payment...

Create Reviews...

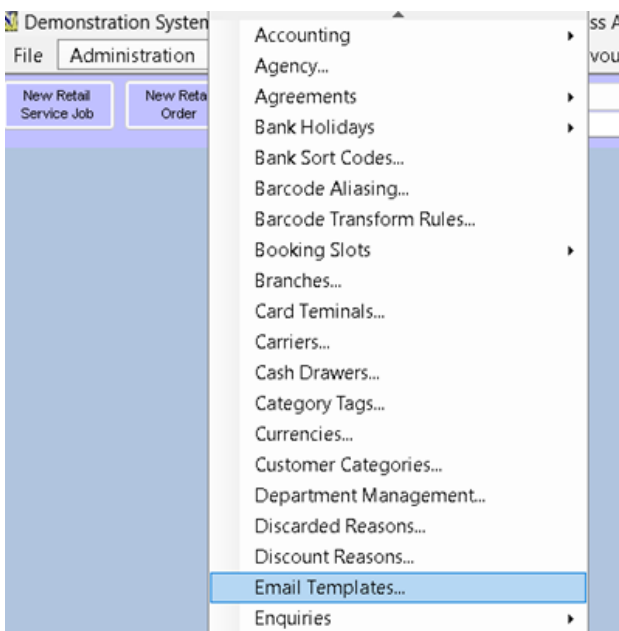
Close

Letter Templates

Configuring Renewal Letters in NCompass Email System

Renewal letters are sent out via the NCompass Email system, the template can be configured in the admin menu.

Navigate to **Administration > Email Templates**.



Assistance

Our Implementations Team will assist you in setting up templates and linking them for you. There is an additional hourly charge for this service.

Adding a New Template

Email Template Administration

Templates

- Example Renewal Letter
- Field Call Changed – Carrier
- Field Call Changed – In House
- Field Call Complete – In House
- Field Call Consignment Sent – C
- Field Call Consignment Sent – C
- Field Call Creation – Carrier
- Field Call Creation – In House
- Item Return Note

☒ Standardise Case
☐ Show Expired

Template Settings

Description: Example Renewal Letter

Subject: Agreement %AGNO% is due for Renewal

Message Attachments

Dear %TITLE% %SURNAME%

Your agreement number%AGNO% is due for renewal on %RENEWALDATE%

This email is an automatic reminder

Our admin team will contact you to discuss your renewal options

Supported tags:

Tag	Meaning
%CARRIERDESCRIPTION%	Field Call Carrier Description

☐ Expired

Close Cancel Save

1. Click **'New'**.
2. Enter your email template text into the message box.
 - You can add tags from the list. The tags insert customer or agreement information when the email is sent. The list of tags now includes **%RENEWALDATE%** and **%AGNO%**

To attach PDF documents (same document for all customers, e.g., general terms and conditions or promotional documentation):

Click on the **'Attachments'** tab.

Template Settings

Description: Example Renewal Letter

Subject: Agreement %AGNO% is due for Renewal

Message Attachments

Please ensure any attachments are in locations accessible to all workstations

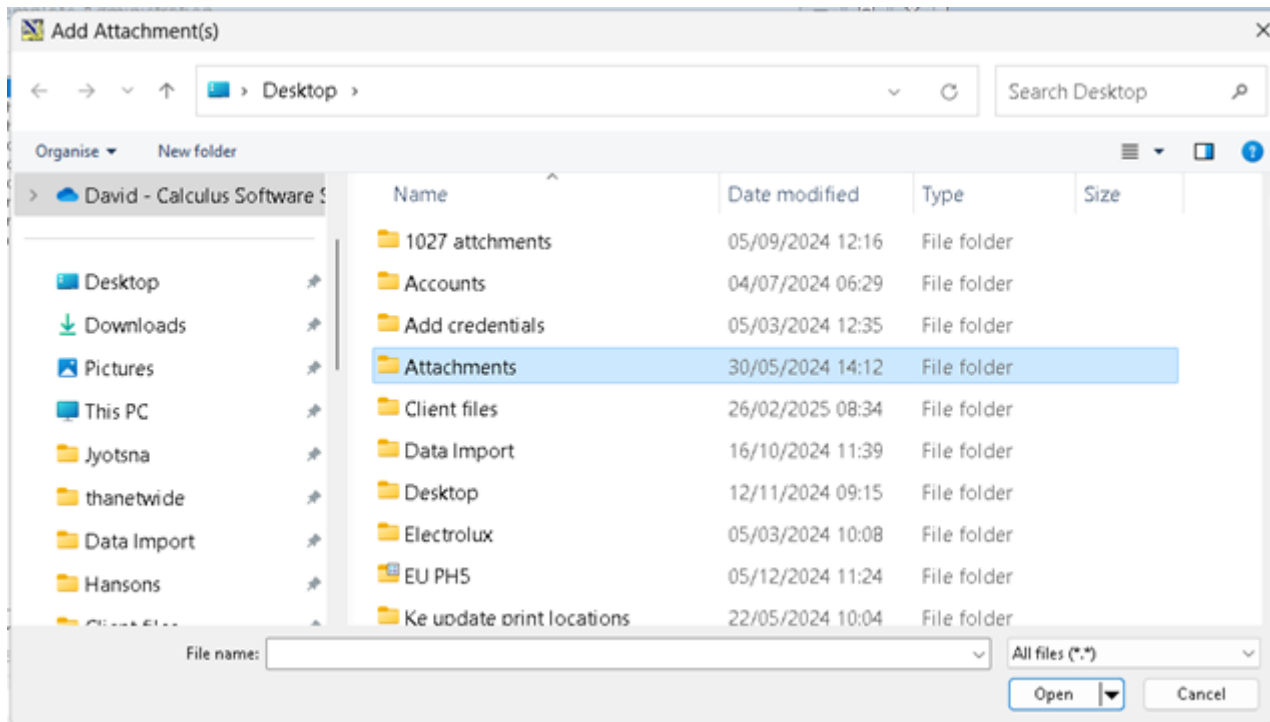
C:\Users\David Pinder\Desktop\Desktop\LS2208 scanner
 C:\Users\David Pinder\Desktop\Desktop\Crystal Reports
 C:\Users\David Pinder\Desktop\Desktop\34_0100_0341_

Add...

Remove

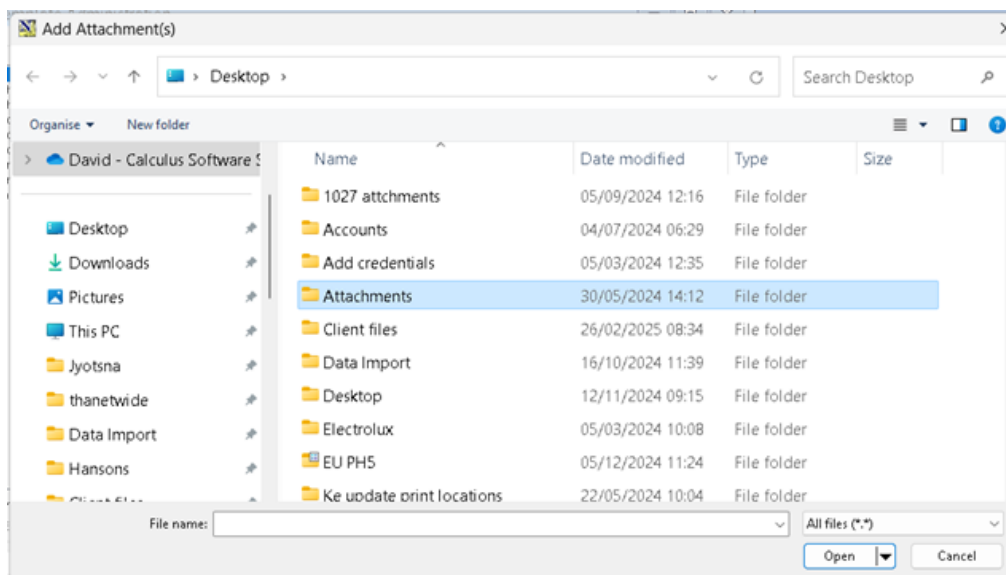
Click **'Add'** to open a file browser and add your PDF documents.

Browse to your file attachment. You can use the normal Windows browsing and selection, including highlighting multiple documents at once.



- Click the **'Open'** button to add them to your list of attachment
- You can add multiple documents by clicking the **'Add'** button again.

Once your message and attachments are complete, click **'Save'**.



Deleting an Attachment

1. Highlight your attachment.
2. Click **'Delete'** to remove the attachment from the list.

Editing a Template

1. Highlight your template from the list.
2. Click **'Edit'**.
3. Amend the template as needed.
4. Click **'Save'**.