

Setup And Configuration

How to setup Admin and configuration options

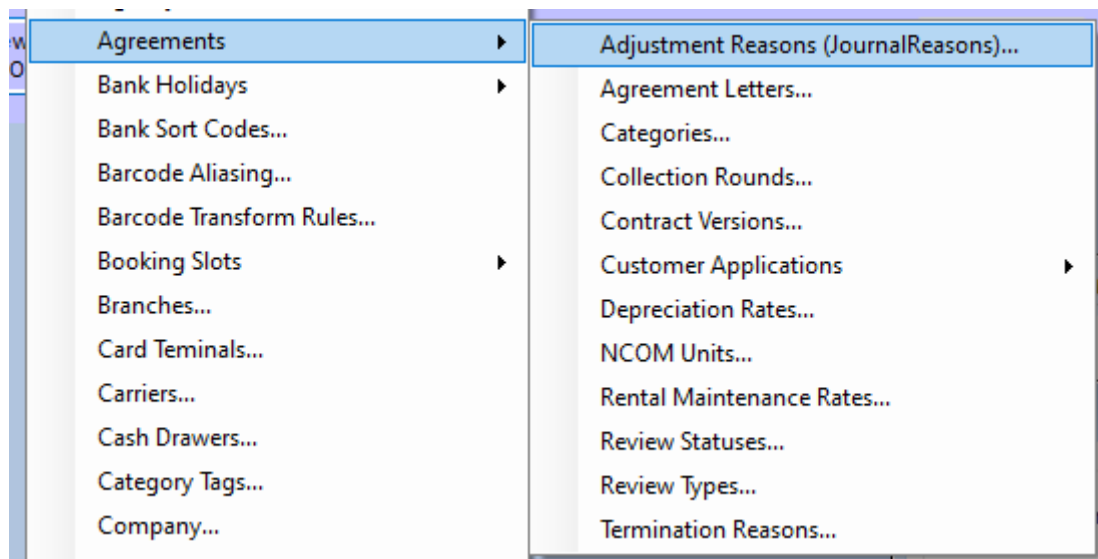
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Configuration Options

Administration settings

There are a range of Administration options and settings, these can be accessed, from the :-

Administration > Agreements



Adjustment (Journal) Reasons

Administration > Agreements > Adjustment Reasons

Here you can set up a range of reasons for selecting when making Journal entries

There will be a range of defaults already setup, these can be edited if required, but they are global, so if they have already been used, it's better to make them as expired and setup a new reason

There are two options that can be added

Applies to Cancelled agreements - this Reason is only available on cancelled agreements

Applies to Written off agreements - this Reason is only available on written off agreements

- Highlight and click 'Edit' to amend an existing Reason
- Click 'Create New' to add a new Reason
- Highlight and click 'Create Using' to generate a new reason, copying the setting from your highlighted choice
- Delete- this will delete the highlighted entry, note some entries in the reason list are system locked, you may also be blocked from deleting a reason that has already been used

Agreement Letters

Administration > Agreements > Agreement Letters

Here you can setup system letters, these are triggered in some parts of the agreement system, Note, this is the bridge between the Agreement system and the output types, normally you will not need to amend anything here, please speak to our support team if you require help

Agreement Letter Administration

Product Feeds

Direct Debit Failed

New >

Edit >

Delete

Currency Settings

Description: Direct Debit Failed

Type Selection

☐ Email ☒ Letter

Filename: agreement_letter_ddfailed

Query Name: RentalAgreement

☐ Use For Renewals

☐ Expired

☒ Standardise Case

Close

☐ Show Expired

Cancel

Save

You can setup letters as Email or File (crystal Reports format)

- Highlight and click 'Edit' to amend an existing letter
- Click 'Create New' to add a new letter
- Delete- this will delete the highlighted entry, note some entries in the Letter list are system locked, you may also be blocked from deleting a Letter that has already been used

Select if the letter is Email or file, if its email, you will be asked to select a preset email for the list, please see your main Administration guide on setting up email templates

Agreement Category Administration

Agreement Categories

Pending Close

Standard

New >

Edit >

Delete

☐ Show Expired

☐ Standardise Case

Category Settings

Description: Pending Close

☐ Override BACS User Number:

Maintenance Commission Multiplier: 1.00

Rental Commission Multiplier: 1.00

Service Contract Commission Multiplier: 1.00

Filename Prefix:

Please do not modify this setting unless directed by Support

☐ Expired

Close

Cancel

Save

Collection Round Administration

Rounds

15th Of The Month

22nd Of The Month

30th Of The Month

9th Of The Month

Cookstown 15Th

Round A

Round B

Edit >

Create Using

Create New

Delete

☒ Standardise Case

Close

Details

Round Name: 15th Of The Month

☐ Lead Engineer:

Lead Engineer is used to link to Mobile devices

☐ Expired

Cancel

Save

Enter the details to match - any text blank will be ignored

Details

Agreement Contract Version Admin

Versions

Not Recorded

New >

Edit >

Delete

Contract Version

Description:

☐ Applies to HP

☐ Applies to Maintenance

☐ Applies to Rental

☐ Applies to Service Contract

☐ Expired

Cancel

Save

Close

☐ Show Expired

Agreements

Bank Holidays

Bank Sort Codes...

Barcode Aliasing...

Barcode Transform Rules...

Booking Slots

Branches...

Card Terminals...

Carriers...

Cash Drawers...

Category Tags...

Company...

Currencies...

Adjustment Reasons (JournalReasons)...

Agreement Letters...

Categories...

Collection Rounds...

Contract Versions...

Customer Applications

Depreciation Rates...

NCOM Units...

Rental Maintenance Rates...

Review Statuses...

Review Types...

Termination Reasons...

Goods In

Scheduled Calls

Accommodation Status...

Agreement Types...

Categories...

Employment Status...

History Statuses...

Marital Statuses...

Property Types...

Accommodation Status

Accommodation

- Council Tenant
- House Owner
- Housing Association
- Living With Parents
- Mobile Home
- Private Tenant
- Tied Property

New >

Edit >

Delete

Accommodation Settings

Description: Council Tenant

☒ Landlord Required

☐ Furnished Required

☐ Expired

☐ Show Expired

Cancel Save

☒ Standardise Case

Close

Employment Status

Employment

- Benefits
- Fulltime
- House Wife
- Job Share
- Part-time employed
- Retired
- Self Employed
- Unemployed

New >

Edit >

Delete

Employment Settings

Description:

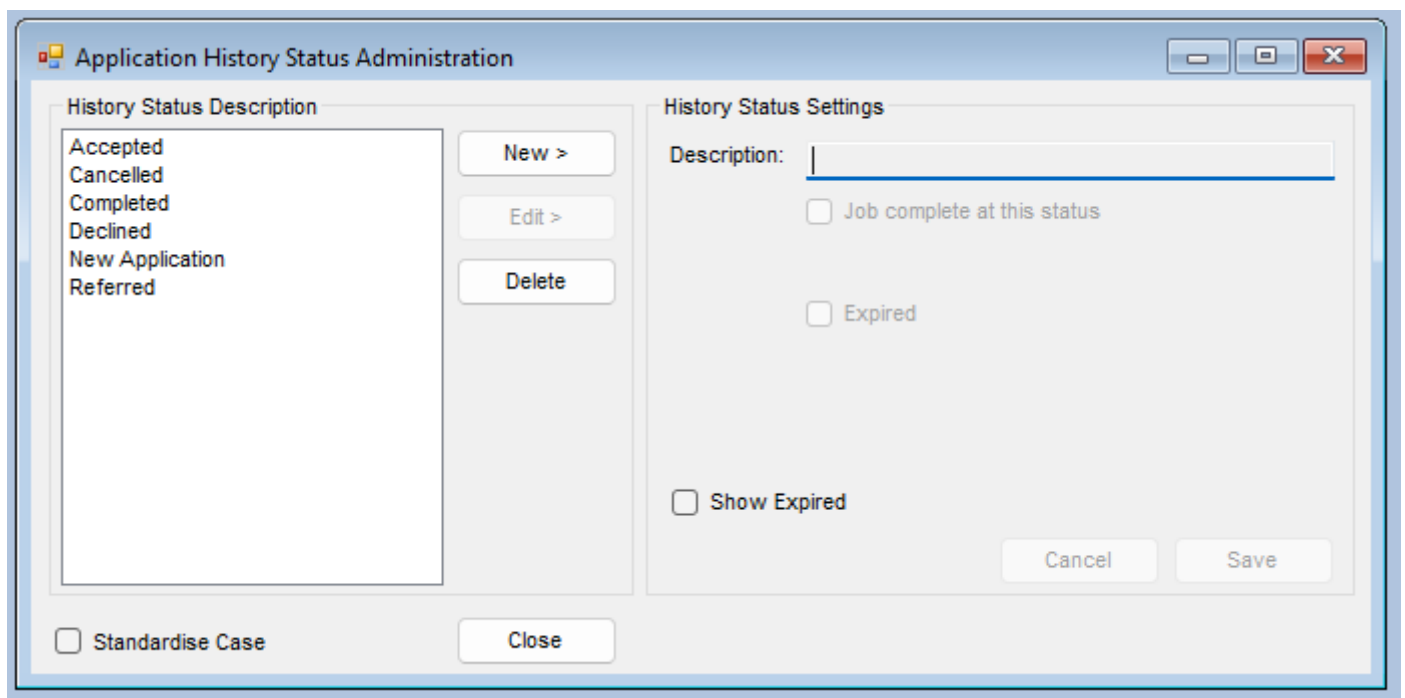
☐ Expired

☐ Show Expired

Cancel Save

☒ Standardise Case

Close

The window is titled "Application History Status Administration". It features a list of status types on the left: Accepted, Cancelled, Completed, Declined, New Application, and Referred. To the right of this list are three buttons: "New >", "Edit >", and "Delete". The right side of the window is titled "History Status Settings" and contains a "Description:" text field, two checkboxes labeled "Job complete at this status" and "Expired", and a checkbox labeled "Show Expired". At the bottom left is a checkbox labeled "Standardise Case", and at the bottom right are "Cancel" and "Save" buttons. A "Close" button is located at the bottom center.

Application History Status Administration

History Status Description

- Accepted
- Cancelled
- Completed
- Declined
- New Application
- Referred

New >

Edit >

Delete

History Status Settings

Description:

☐ Job complete at this status

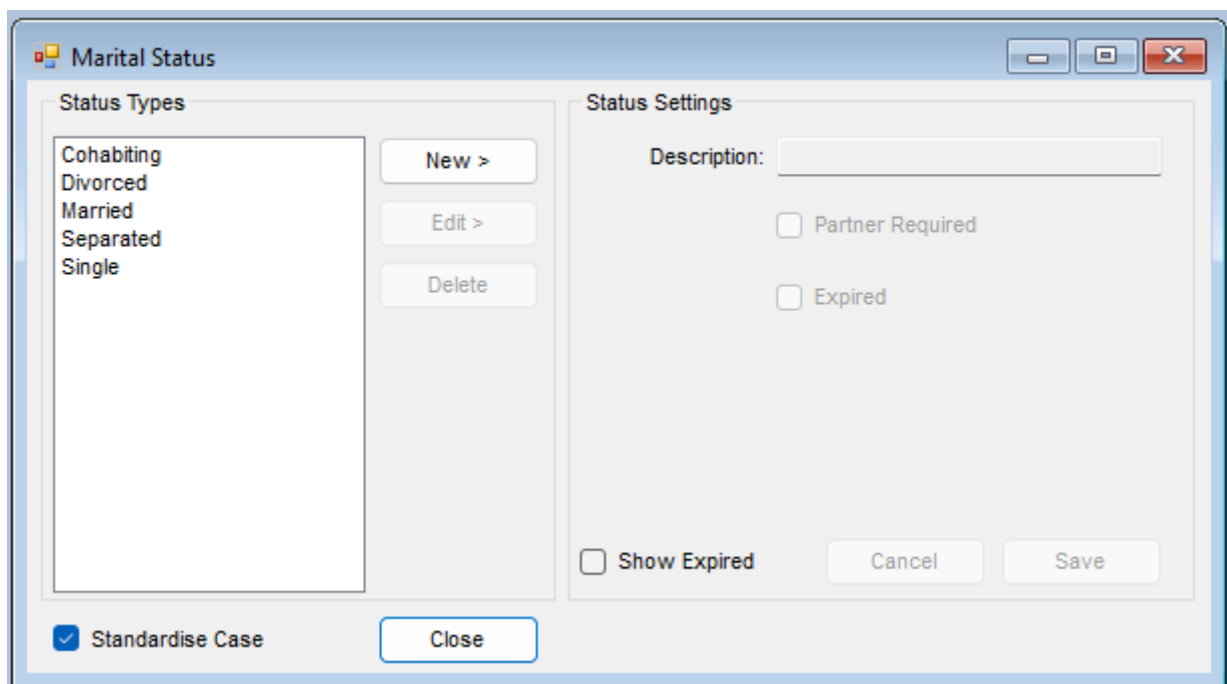
☐ Expired

☐ Show Expired

Cancel Save

☐ Standardise Case

Close

The window is titled "Marital Status". It features a list of status types on the left: Cohabiting, Divorced, Married, Separated, and Single. To the right of this list are three buttons: "New >", "Edit >", and "Delete". The right side of the window is titled "Status Settings" and contains a "Description:" text field, two checkboxes labeled "Partner Required" and "Expired", and a checkbox labeled "Show Expired". At the bottom left is a checked checkbox labeled "Standardise Case", and at the bottom right are "Cancel" and "Save" buttons. A "Close" button is located at the bottom center.

Marital Status

Status Types

- Cohabiting
- Divorced
- Married
- Separated
- Single

New >

Edit >

Delete

Status Settings

Description:

☐ Partner Required

☐ Expired

☐ Show Expired

Cancel Save

☒ Standardise Case

Close

Property Types

Types

Flat
House
Mobile House

☒ Standardise Case

Property Settings

Description:

☐ Has Intercom
☐ Expired

☐ Show Expired

XXXXXXXXXXXXXXXXXXXX

Depreciation Rates - Administration

Rates

Standard (Default)

☒ Type:

Straight-line (only duration applies)
Straight-line (only duration applies)
Reducing Balance (only percent applies)
Write-off (written off at next run)
Formula

☐ Expired

☐ Standardise Case

Rate Details

Name: Standard (Default)
Duration: 48 months
Percentage: 2.08333%

Updating a depreciation rate will update the rate for all items using that rate.

NCOM Unit Admin

Units

Edit >

Create Using

Create New

Delete

Cloud

☐ Standardise Case

Close

Details

Serial No:

Tel Number:

Unit Type:

PassCode:

Fitted to:

<Support>

Last sent:

<Support>

<Support>

☐ Expired

Cancel

Save

Maintenance/Rental Agreement Schemes - Administration

Schemes

[None]

Edit >

Create Using

Create New

Delete

Scheme Details

Name:

Rate:

0

per month

Minimum duration:

0

months

☐ Maximum Cover:

months

☐ Expired

Cancel

Save

Schemes allow you to set the price for rental / maintenance of products, for easy maintenance.

Close

Agreement Review Status Administration

Review Statuses

Cancelled

Completed

Open

New >

Edit >

Delete

Statuses Settings

Description:

Cancelled

☐ Treat as Complete

☒ Treat as Canceled

☐ Expired

☐ Show Expired

Cancel

Save

☐ Standardise Case

Close

Agreement Review Type Administration

Review Types

General Review [Default]

Renewal Requiring Attention

New >

Edit >

Delete

Types Settings

Description: General Review [Default]

☐ Expired

☐ Show Expired

Cancel

Save

Close

☐ Standardise Case

Agreement Termination Reason Administration

Reasons

Automatic at End Date

No longer required

Re-rented

New >

Edit >

Delete

Reason Settings

Description: No longer required

☐ Expired

☐ Show Expired

Cancel

Save

☒ Standardise Case

Close