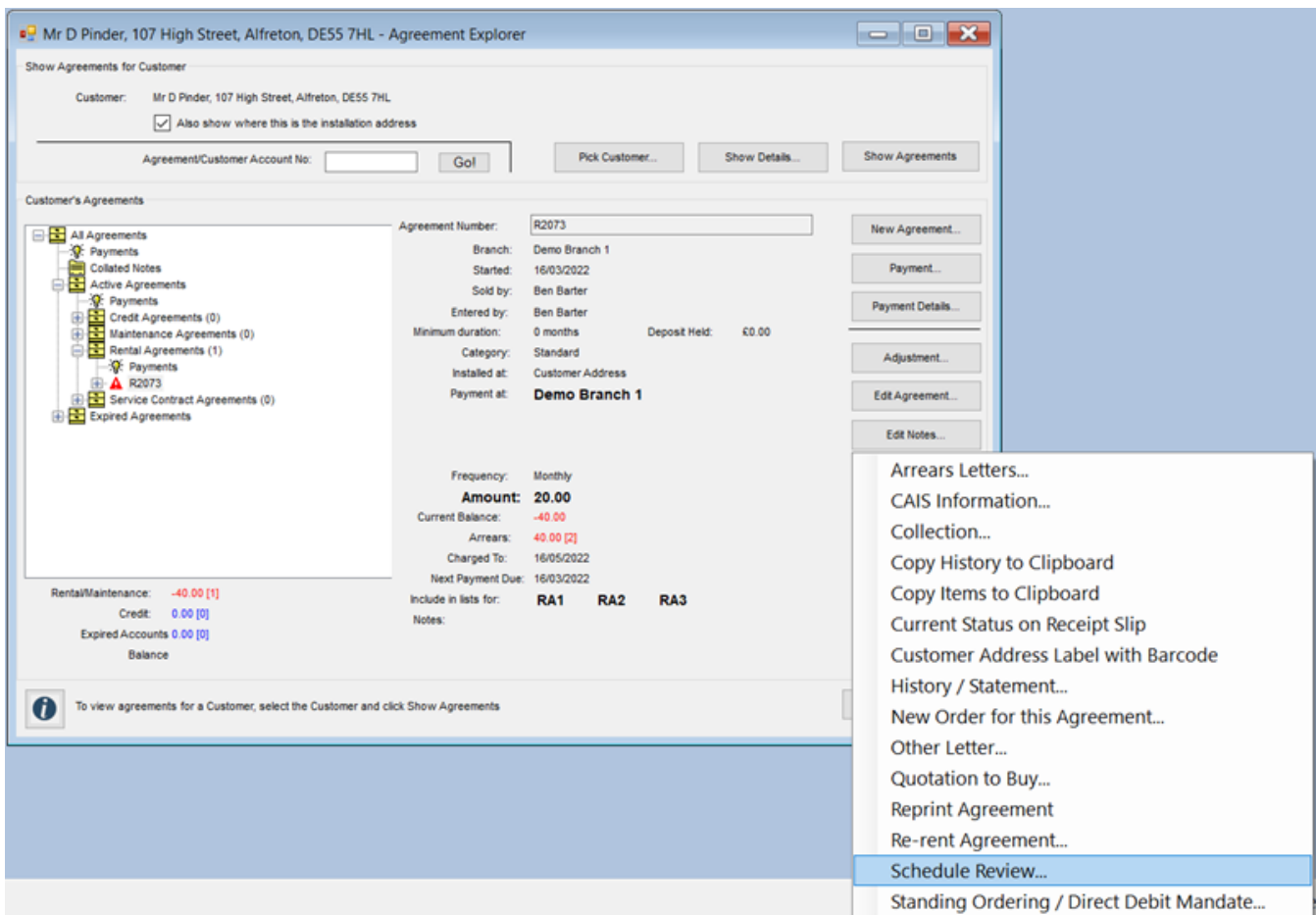


Entering an Agreement into the Review System

Scheduling a Review from the Agreement Explorer Window

1. Navigate to **Agreements > Agreement Explorer** or press **F5** on your keyboard.
2. Enter your customer details by clicking the **'Pick Customer'** button or enter an agreement or customer number directly into the account number box and press **'Go!'**.
3. Click on the required agreement number in the agreement tree on the left, and then click the **'More..'** button.
4. Select the **'Schedule Review'** option.



This will open the Review entry window.

Agreement R2073

Created By: Ben Barter

Review Date: 30/03/2023

Review Status: Awaiting New Bank Details

Assigned To: David Pinder

Review Type: Account in Arrears

Comments: Direct Debit Failed, Chase customer for new bank details

Display Agreement... Customer History... Take Cancel Save

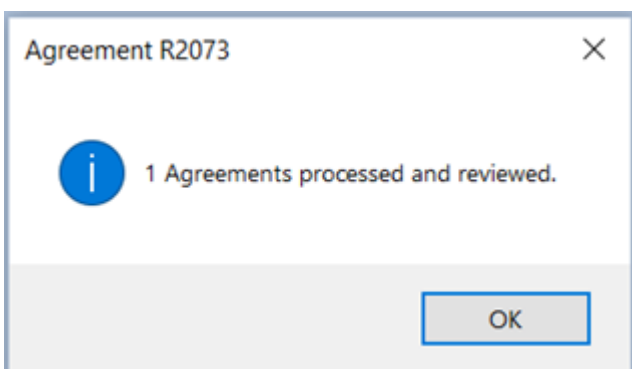
Enter the Required Details

- **Created by** – Who is scheduling the review.
- **Review date** – When this needs to be reviewed.
- **Assigned to** – The person responsible for the review process.
- **Review status** – From your pre-configured list (e.g., open, awaiting contact, etc.).
- **Review type** – The reason for the review from your pre-configured list.
- **Comments** – Any comments you need to add to the review.

There are convenient buttons on this screen to take you directly to:

- **Display Agreement**
- **Customer History**
- **Take Payment**

5. Click '**Save**'.



Note: Review comments are stored directly in customer history, along with the account number.

Customer History[Mr D Pinder, 107 High Street, Alferton, DE55 7HL]

Customer

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

Detail:

Add Detail

Salesperson:

Filter for Notes:

☐ Link to Sale:

Pick...

☐ Mark as Private

Search

Notes:

History

Ref	Comments	Date	Salesperson
	Call placed from NCompass to 01623 on NCompassServer	19/09/2018 11:44	Dale Barden
	Call placed from NCompass to 01623 on NCompassServer	19/09/2018 14:18	Dale Barden
ORD1801	Customer was changed from No Customer Selected [NCCRM/NONE] to Mr D Pinder, 107 High Stre...	03/02/2021 16:22	Ben Barter
	Call placed from NCompass to 07971959260 on NCompassPC100	14/10/2021 11:58	Ben Barter
ORD1854	Customer was changed from No Customer Selected [NCCRM/NONE] to Mr D Pinder, 107 High Stre...	19/01/2023 13:29	Amazon Sales
R2073	Direct Debit Failed, Chase customer for new bank details	30/03/2023 12:11	Ben Barter

Pick Customer...

Show Details...

Add History

Agreements...

Sales...

Service Jobs...

Add New Service Job...

Copy History

Close

Created 2026-08-05 10:35:03 UTC by David Pinder
Updated 2026-08-05 10:35:03 UTC by David Pinder