

Agreement Reviews

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Overview

This module is specifically designed to manage agreements, it allows you to tag an agreement for review, this could be for several reasons.

- Account in arrears
- Customer has made an enquiry for account balance or discrepancy.
- Equipment upgrades
- Old accounts with static activity

You can preconfigure a range of review reasons so you can simply pick from a list

Once the agreement is in review; it can be assigned a review date and the member of staff you want to action the review.

The review can be updated and given a new review date or passed to a different member of staff, for example, if you had a customer that had been renting the same equipment for years, you could review the account balance and payment history and if they were suitable for an upgrade, pass the review on to a member of your sales team to process an upgrade, or if there were missing payments, assign it to your debt recovery team.

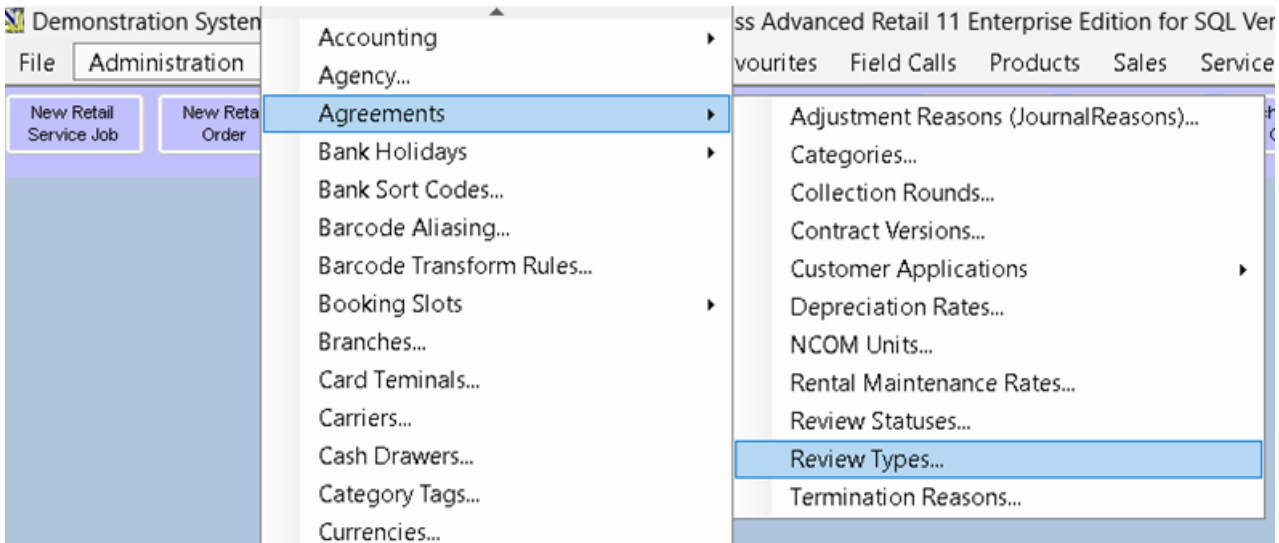
Prerequisites

- **NCompass Advanced Retail Enterprise Edition**
- **Active License:** You must have an active license for at least one of the following agreement modules:
 - Rental
 - Hire Purchase
 - Maintenance
 - Service Contracts
 - Agreement Reviews

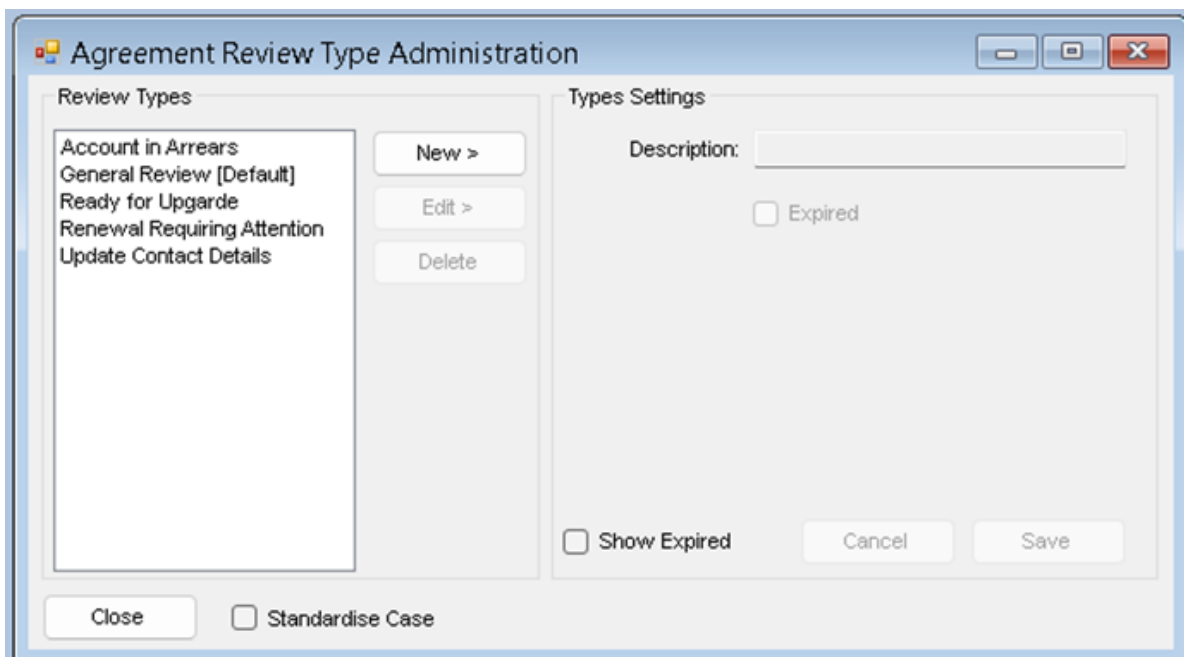
Configuration

Setting up Agreement Review Types

To set up agreement review types, navigate to the administration menu: Administration > Agreements > Review Types

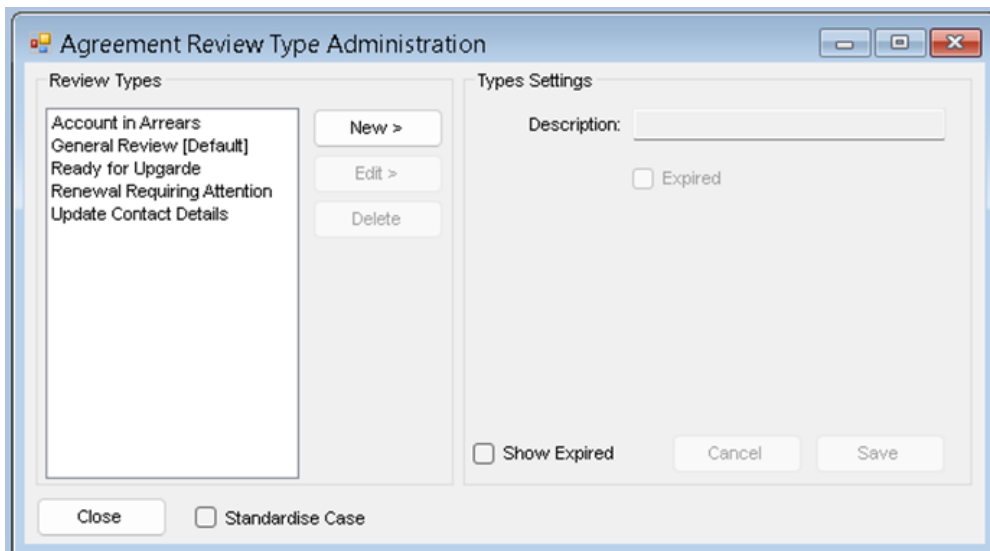


Each review type serves as a descriptive tag for the review. You can create as many review types as needed. Review types can only be deleted if they have not been used. If a review type is no longer needed, mark it as expired.



Deleting a Review Type

1. Highlight the entry and click **'Delete'** (only available if the review type has not been used).

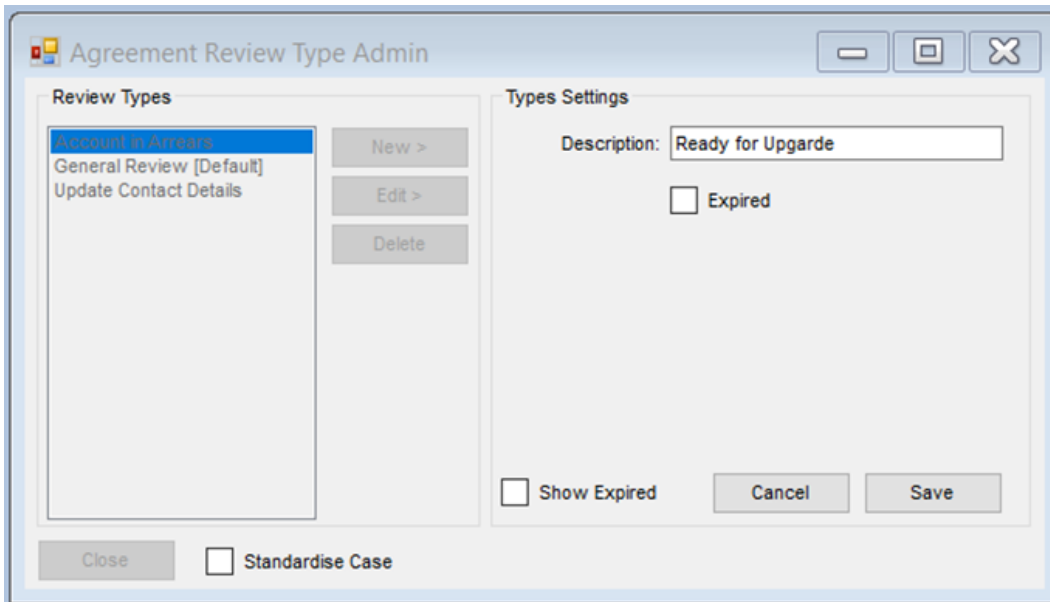


Editing a Review Type

1. Highlight your entry and click **'Edit'**.
2. You can update the description or mark it as expired.
3. Click **'Save'**.

Adding a New Review Type

1. Click **'New'**.
2. Enter the description of the review type.
3. Click **'Save'**.

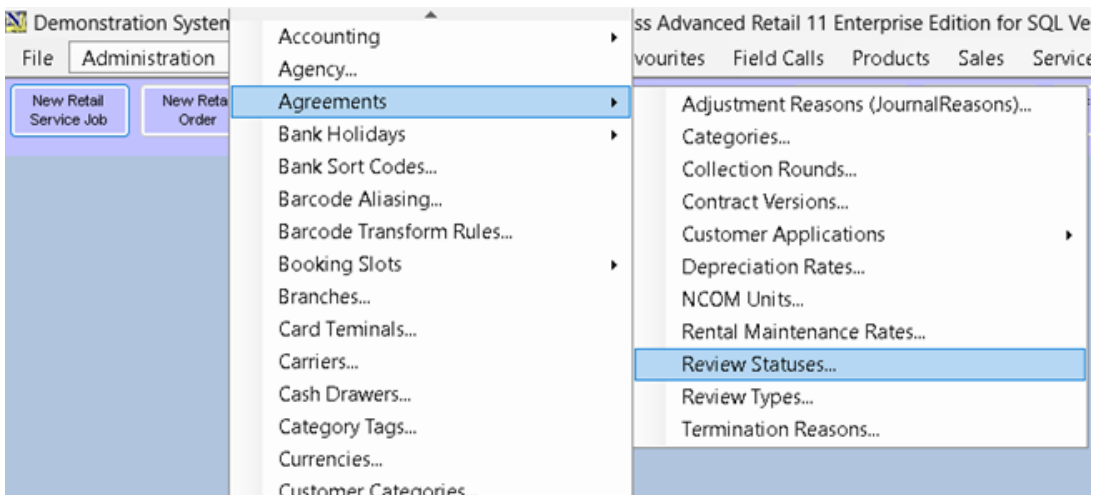


Note: The **Standardise Case** checkbox will tidy your text entry automatically on save.

Setting Up Agreement Review Statuses

Agreement review statuses can be set up from the administration menu.

1. Navigate to **Administration > Agreements > Review Statuses**.



Deleting a Review Status

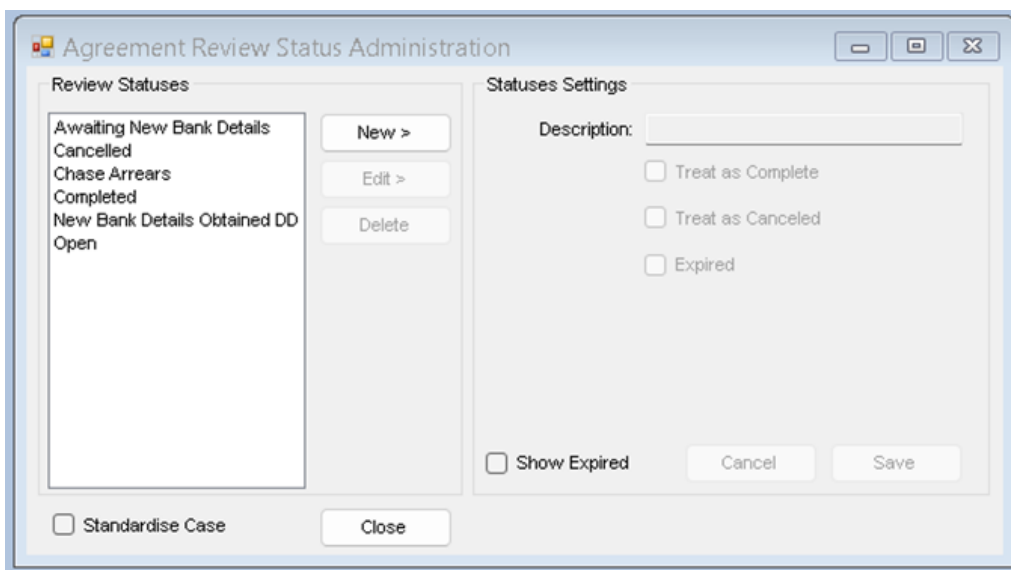
1. Highlight the entry and click **'Delete'** (only available if the review status has not been used).

Editing a Review Status

1. Highlight your entry and click **'Edit'**.
2. You can update the description, change the completion status, or mark it as expired.
3. Click **'Save'**.

Adding a New Review Status

1. Click **'New'**.
2. Enter your description and tick the options you require.
3. Click **'Save'**.



Required Statuses

You will need at least one status with a completed option. It is recommended that you also have at least one with a cancelled option. There will be defaults for these pre-loaded in your system.

- **Treat as Complete** - If this option is set, the review status will mark the review as complete.
- **Treat as Cancelled** - If this option is set, the review status will mark the review as cancelled.
- **Expired** - This will expire the review status so that it can no longer be used.

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.

The screenshot displays the 'Agreement Explorer' window for a customer named Mr D Pinder. The window is titled 'Mr D Pinder, 107 High Street, Alfreton, DE55 7HL - Agreement Explorer'. It shows a tree view of agreements on the left, with 'R2073' selected. The main area displays details for agreement R2073, including branch, start date, and payment frequency. A context menu is open over the agreement details, listing various actions such as 'Arrears Letters...', 'CAIS Information...', and 'Schedule Review...'. The 'Schedule Review...' option is highlighted in blue.

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

Show Agreements for Customer

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

Also show where this is the installation address

Agreement/Customer Account No:

Customer's Agreements

Agreement Number: R2073

Branch: Demo Branch 1

Started: 16/03/2022

Sold by: Ben Barter

Entered by: Ben Barter

Minimum duration: 0 months

Category: Standard

Installed at: Customer Address

Payment at: Demo Branch 1

Deposit Held: £0.00

Frequency: Monthly

Amount: 20.00

Current Balance: -40.00

Arrears: 40.00 [2]

Charged To: 16/05/2022

Next Payment Due: 16/03/2022

Include in lists for: RA1 RA2 RA3

Notes:

Rental/Maintenance: -40.00 [1]

Credit: 0.00 [0]

Expired Accounts 0.00 [0]

Balance

To view agreements for a Customer, select the Customer and click Show Agreements

- Arrears Letters...
- CAIS Information...
- Collection...
- Copy History to Clipboard
- Copy Items to Clipboard
- Current Status on Receipt Slip
- Customer Address Label with Barcode
- History / Statement...
- New Order for this Agreement...
- Other Letter...
- Quotation to Buy...
- Reprint Agreement
- Re-rent Agreement...
- Schedule Review...**
- Standing Ordering / Direct Debit Mandate...

This will open the Review entry window.

Agreement R2073

Created By: Ben Barter

Review Date: 30/03/2023

Assigned To: David Pinder

Review Status: Awaiting New Bank Details

Review Type: Account in Arrears

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

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

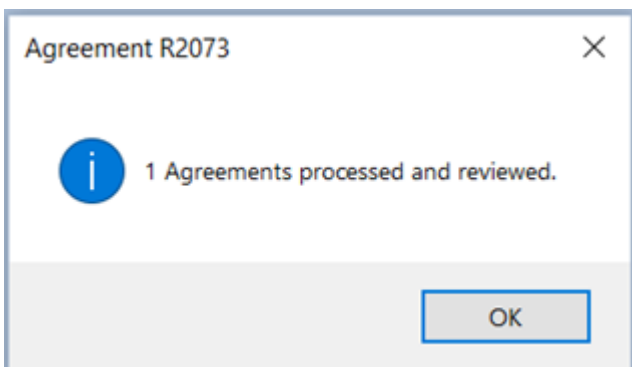
Enter the Required Details

- **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

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

Detail:

Pick Customer...

Show Details...

Add Detail

Salesperson:

Filter for Notes:

Add History

Link to Sale:

Pick...

Mark as Private

Search

Notes:

History

Agreements...

Sales...

Service Jobs...

Add New Service Job...

Copy 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

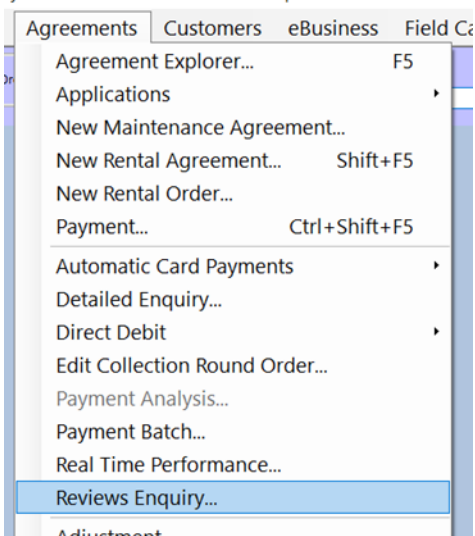
Close

Processing The Review

Review Enquiry

1. Navigate to **Agreements > Review Enquiry** from the Agreements menu.

This will open the Review Enquiry window.



Default Enquiry Search Settings

The following defaults are normally set for the enquiry search:

- Reviews with an open status.
- Reviews that need actioning from today's date.
- Reviews assigned to the signed-in operator.

You can check any required filters and select the available options from the drop-down lists.

Searching for Reviews

1. Click the **'Search'** button.

Reviews Enquiry

Search Options

Created On Date: From: To:
 Review On Date: From: 30/03/2023 To:
 Completed On Date From: To:
 Include Open
 Include Cancelled
 Include Complete

Created By:
 Assigned to: David Pinder Completed By:
 Review Type: Review Status:
 Agreement Code: Agreement Type:

2 Reviews

Assigned To	Completed By	Agreement	Comments	Current Balance	Current Monthly Rate	Created Date	Review Date	Completed Date	Customer
David Pinder		R2000	now chased	-£1,797.75	£7.99	30/03/2023	30/03/2023		Mr Bearder, 5 Pine Close, Shire...
David Pinder		R2073	Direct Debit Failed, Chase cust...	-£40.00	£20.00	30/03/2023	30/03/2023		Mr D Pinder, 107 High Street, Al...

Button Options

There are button options here to take you directly to:

- **Display Review**
- **Display Agreement**
- **Customer History Notes**
- **Take Payments**

Display Review

1. Highlight the required review and click **'Display Review'** (or you can double-click the entry you want).

This will open the review on screen.

Agreement R2073; Review started on 30/03/2023

Created By: Ben Barter

Review Date: 30/03/2023

Assigned To: David Pinder

Review Status: Awaiting New Bank Details

Review Type: Account in Arrears

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

Display Agreement... Customer History... Take Edit Close

Updating the Review

You can update the review by clicking the **'Edit'** button.

Options for Updating

- **Re-timing the review** - Set a new date for the review to be actioned.
- **Reassigning the review** - Change the assigned person from the dropdown.
- **Change the status** - Update the status to a new one.
- **Changing the comments** - Extend or add new comments.

Note: If you amend the comment, the original comments remain in the customer history. The amended or new comment is also added to the customer history along with the agreement number. If you are adding notes to close a review, there is a separate note field for this.

Closing the Review

A review is closed by selecting a new status that has the **'Treat as Complete'** attribute. When selecting this type of status, a completion details section will appear automatically.

Steps to Close a Review

1. Enter a completion date.
2. Enter the person completing the review from the dropdown.
3. Enter any completion notes.

Agreement R2073

Agreement R2073; Review started on 30/03/2023

Created By: Ben Barter

Review Date: 30/03/2023

Review Status: New Bank Details Obtained DD

Assigned To: Dale Barden

Review Type: Account in Arrears

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

Completed Details

Completed Date: 30/03/2023

Completed by: David Pinder

Notes: example notes

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

Note: Completion notes are automatically added to the customer history as well as to the review completions. If you reopen a review, the completion section will still be visible so that you can see the notes.

Cancelling a Review

Selecting any status that has a **'Treat as Cancelled'** attribute will mark the review as cancelled. It's the same process as completing a review.

Steps to Cancel a Review

1. Click **'Edit'**.
2. Select a status that's treated as cancelled. The completion details will be displayed.
3. Add the reason why the review is being cancelled in the notes section.
4. Click **'Save'**.

Agreement R2000

Agreement R2000; Review started on 30/03/2023

Created By: Amazon Sales

Review Date: 30/03/2023

Review Status: Cancelled

Assigned To: David Pinder

Review Type: General Review [Default]

Comments: now chased

Completed Details

Completed Date: 30/03/2023

Completed by: David Pinder

Notes:

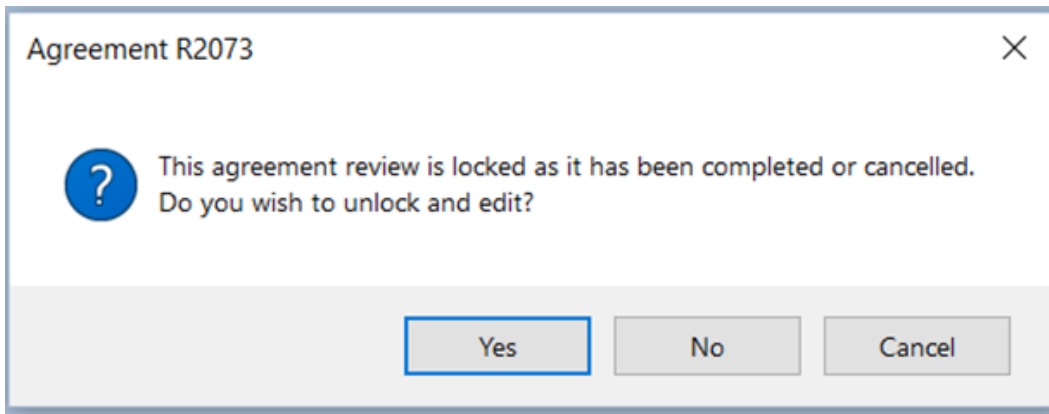
Display Agreement... Customer History... Take Cancel Save

Reopening Reviews

Once a review is marked as complete, it is automatically locked. If you require the ability to reopen completed or cancelled reviews, please speak to your systems administrator.

User Rights for Editing Closed Reviews

If your user rights allow you to edit closed reviews, you will receive a confirmation dialogue.

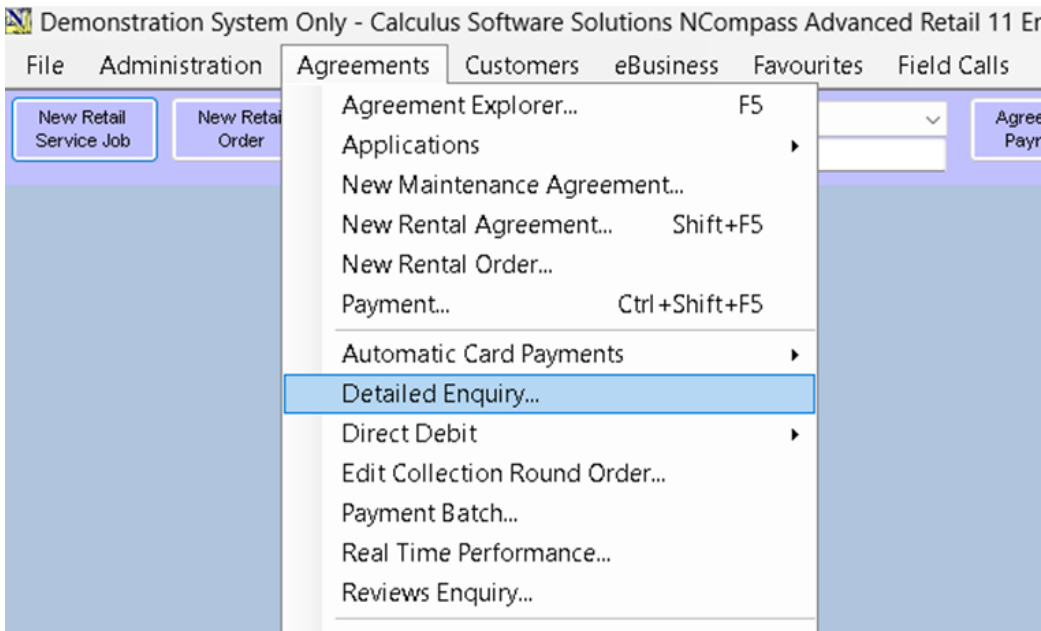


Once unlocked, the review will stay unlocked until it is given a new completion status.

Agreements Detailed Enquiry

Finding Agreements in Review or Renewal

1. Navigate to **Agreements > Detailed Enquiry**.



Filters

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

Renewal Date Filters

Next Charges Review:	<input checked="" type="checkbox"/> Not Set	<input checked="" type="checkbox"/> Is Set	<input type="checkbox"/> From	<input type="text" value="26/02/2025"/>	<input type="checkbox"/> To	<input type="text" value="26/02/2025"/>
Last Charges Review:	<input checked="" type="checkbox"/> Not Set	<input checked="" type="checkbox"/> Is Set	<input type="checkbox"/> From	<input type="text" value="26/02/2025"/>	<input type="checkbox"/> To	<input type="text" value="26/02/2025"/>
Renewal Date:	<input type="checkbox"/> Not Set	<input checked="" type="checkbox"/> Is Set	<input checked="" type="checkbox"/> From	<input type="text" value="26/02/2025"/>	<input checked="" type="checkbox"/> To	<input type="text" value="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:

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

Search has returned 5 records

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 Paymen	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