

# 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 features a search bar for 'Agreement/Customer Account No.' and a 'Go!' button. Below this is a tree view of 'Customer's Agreements' with categories like 'All Agreements', 'Payments', 'Collated Notes', 'Active Agreements', 'Credit Agreements (0)', 'Maintenance Agreements (0)', 'Rental Agreements (1)', 'Service Contract Agreements (0)', and 'Expired Agreements'. The 'Rental Agreements' category is expanded, showing agreement R2073. To the right of the tree is a detailed view for agreement R2073, including fields for Branch (Demo Branch 1), Started (16/03/2022), Sold by (Ben Barter), Entered by (Ben Barter), Minimum duration (0 months), Deposit Held (€0.00), Category (Standard), Installed at (Customer Address), and Payment at (Demo Branch 1). Below these are financial details: Frequency (Monthly), Amount (20.00), Current Balance (-40.00), Arrears (40.00 [2]), Charged To (16/05/2022), and Next Payment Due (16/03/2022). At the bottom, it shows 'Include in lists for: RA1 RA2 RA3' and 'Notes:'. A context menu is open over the agreement details, listing various actions such as '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...' (which is highlighted), and 'Standing Ordering / Direct Debit Mandate...'. A footer note states: 'To view agreements for a Customer, select the Customer and click Show Agreements'.

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

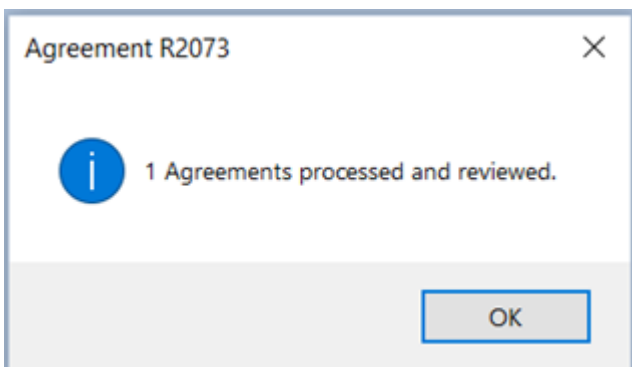
## Enter the Required Details

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

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

Detail:

Add Detail

Salesperson:  Filter for Notes:

Link to Sale:   Mark as Private

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

Buttons: Pick Customer..., Show Details..., Add History, Agreements..., Sales..., Service Jobs..., Add New Service Job..., Copy History, Close

Created 2025-03-10 15:37:09 UTC by Jasmine Richardson  
 Updated 2025-03-10 15:40:07 UTC by Jasmine Richardson