

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