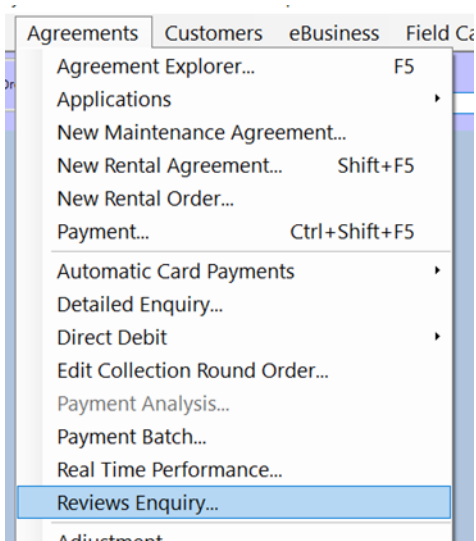


Processing The Review

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:

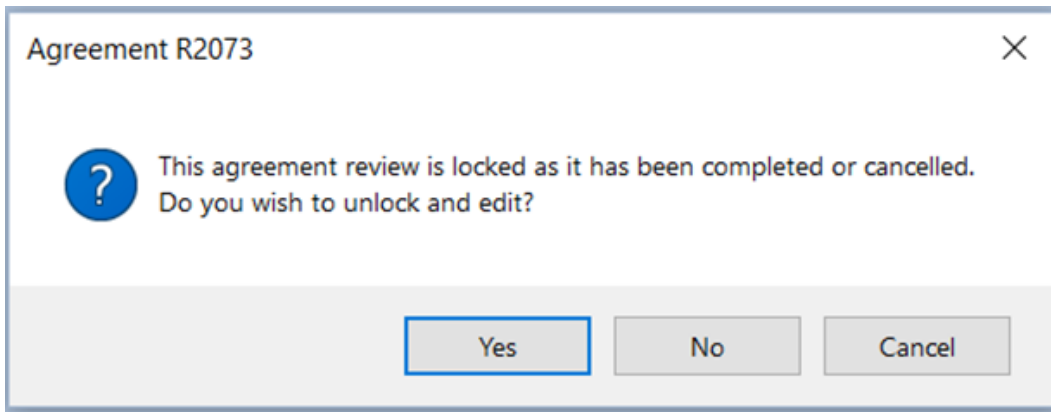
Display Agreement... Customer History... Take Cancel Save

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.

Created 2025-03-10 15:40:34 UTC by Jasmine Richardson
Updated 2025-03-10 15:52:04 UTC by Jasmine Richardson