

# Domestic and General

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# Domestic and General Warranties Configuration and Use

## Domestic and General Warranties Configuration and Use

### **Procedure Guide for NCompass**

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# Overview

NCompass Advanced Retail now supports direct integration for Domestic and General warranties, for both sale and submission.

Schemas include

- In store term warranty
- In store monthly warranty
- Online term warranty

**If you want to be able to sell online monthly warranty, this will require extensions and development to your website, currently we do not offer the facility to sell monthly warranties via your website**

Our cloud server will download warranty rates to your system, and can be set to auto tag products on the scheduled price update, you can set on a department basis the point of sales

in addition, when selling a warranty, a live rate check is performed at the point of sale, this ensures accuracy or warranty rates

Submission is a two-stage process, customer and warranty details are submitted real time, followed by a warranty start date confirmation when the goods are taken or delivery completed

## Configuration

### Tasks

- Set Provider Availability and priority
- Set provider details and accounting options
- Set your dealer ID
- Update warranty templates
- Configure and map warranty Categories to your product department
- Map your manufacturers to Domestic and Generals manufacturers codes
- Ensure products have the correct manufacturers parts and labour periods set
- Enable Activation Sweep

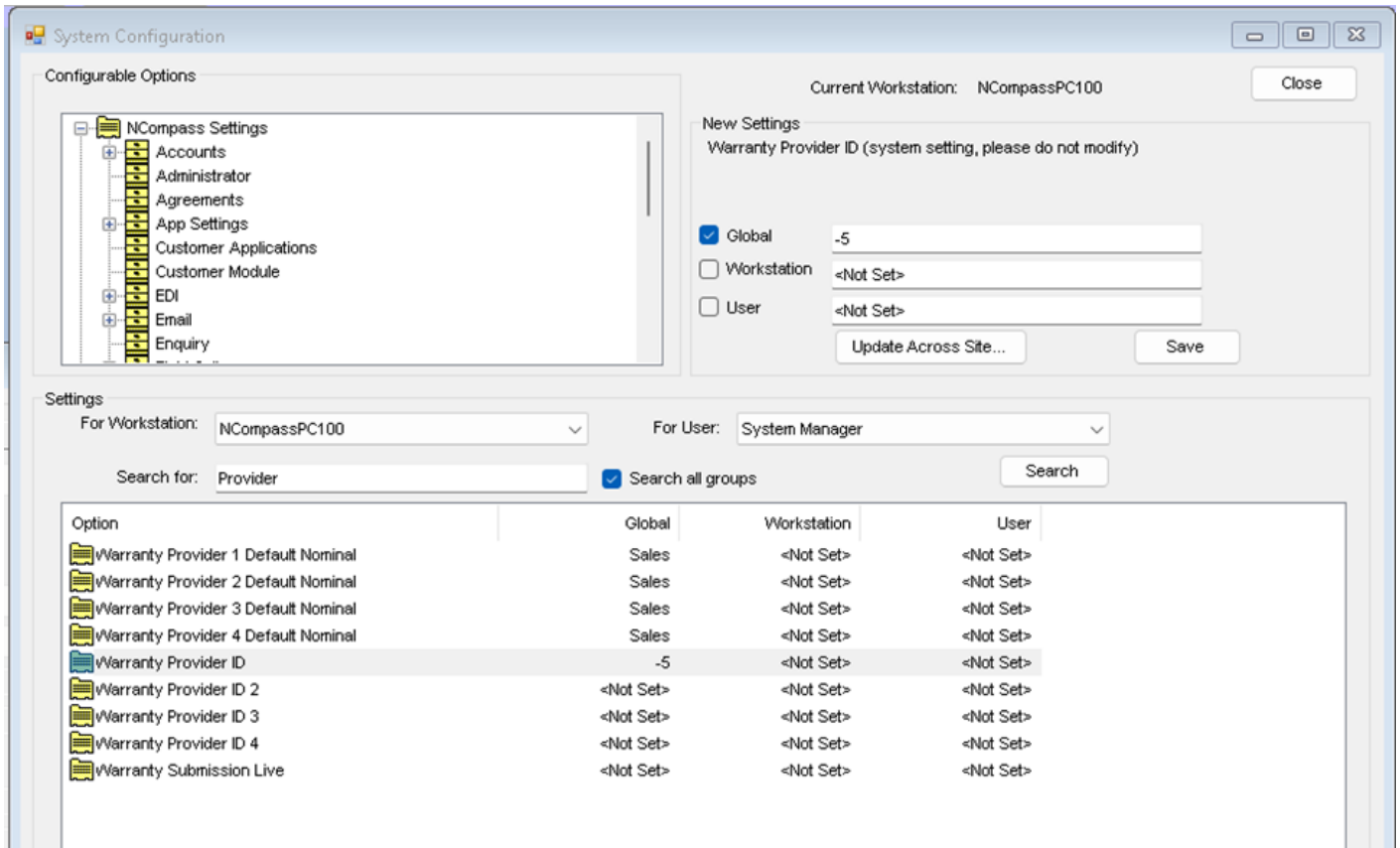
## Setting the providers availability

NCompass supports up to four providers simultaneously, these are set in the configuration menu as providers 1-4

Go to: Tools > configuration

Enter 'provider' into the search box

click the 'search all groups' checkbox, hit search



You should set the provider ID's in the order you want them, and they should be set globally

Domestic and general is normally ID -5

If you have other providers, their id's will already be populated, make a note of the ID numbers before changing them

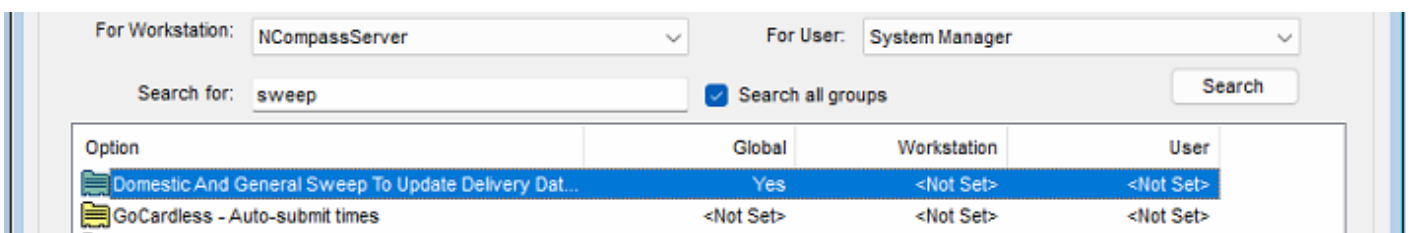
If you unsure, please call support who will assist you

In the example above Domestic and General is set as the first provider and is the only provider

## Activation Sweep

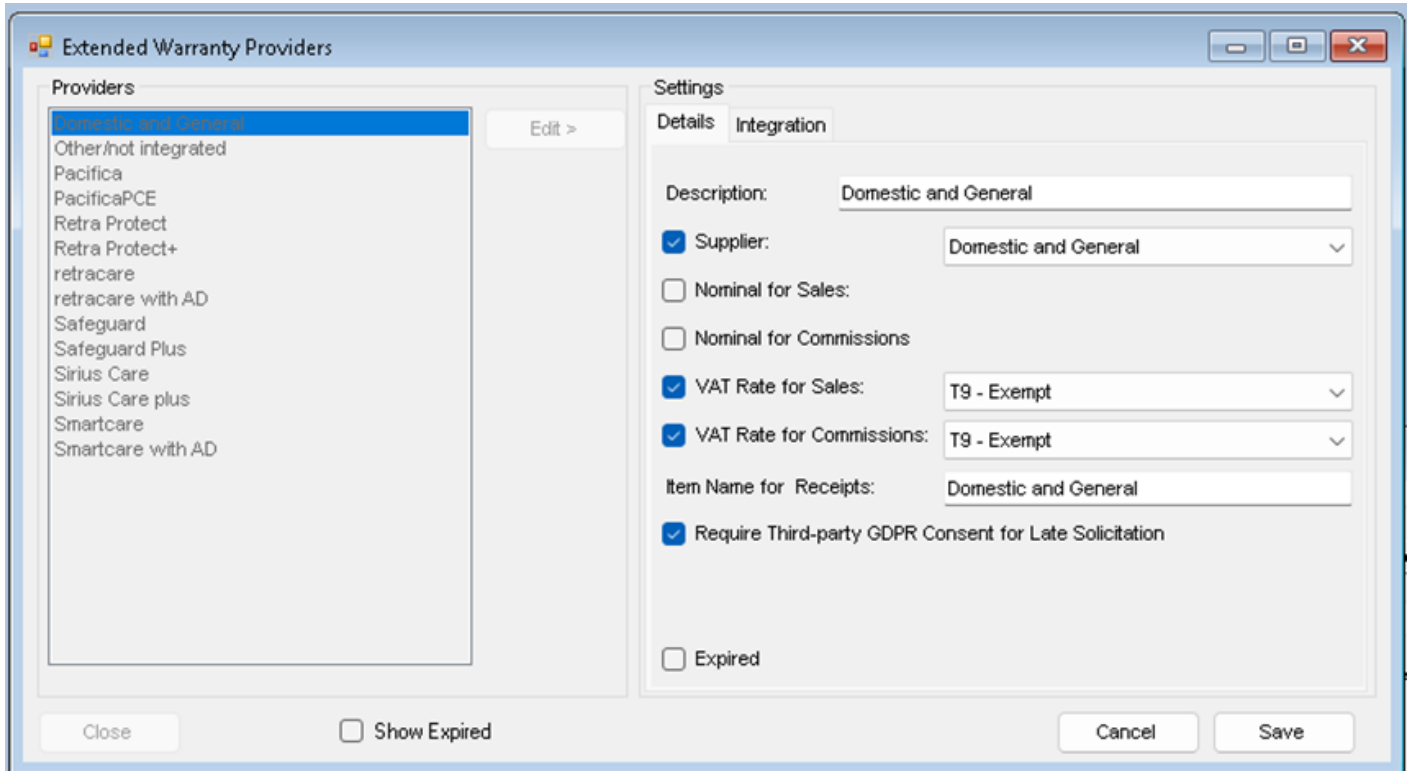
This enables server-side tasks to sweep for activations dates (when the sales are invoiced)

Search for 'Sweep'



## Setting the providers details

Go to: Administration > Extended Warranties > Providers



Select Domestic and General from the list

click 'Edit'

update the details

Click 'Save'

Description – this how the provider appears in NCompass – there is no need to change this

Supplier – NCompass links to accounting systems, and can supplier invoice match to sold warranties, you should link this provider to a supplier in your system, if Domestic and General is not in your supplier list, Go to: Administration > Manufacturers and Suppliers and add a new entry, ensure its marked as a supplier, link it to your accounts system in the normal way

Nominal for Sales – select the nominal to link to for accounts export

Nominal for commissions – not used

Vat Rates – set as exempt (although this is overridden by the warranty template)

Item names for Receipts – how it appears on sales documents

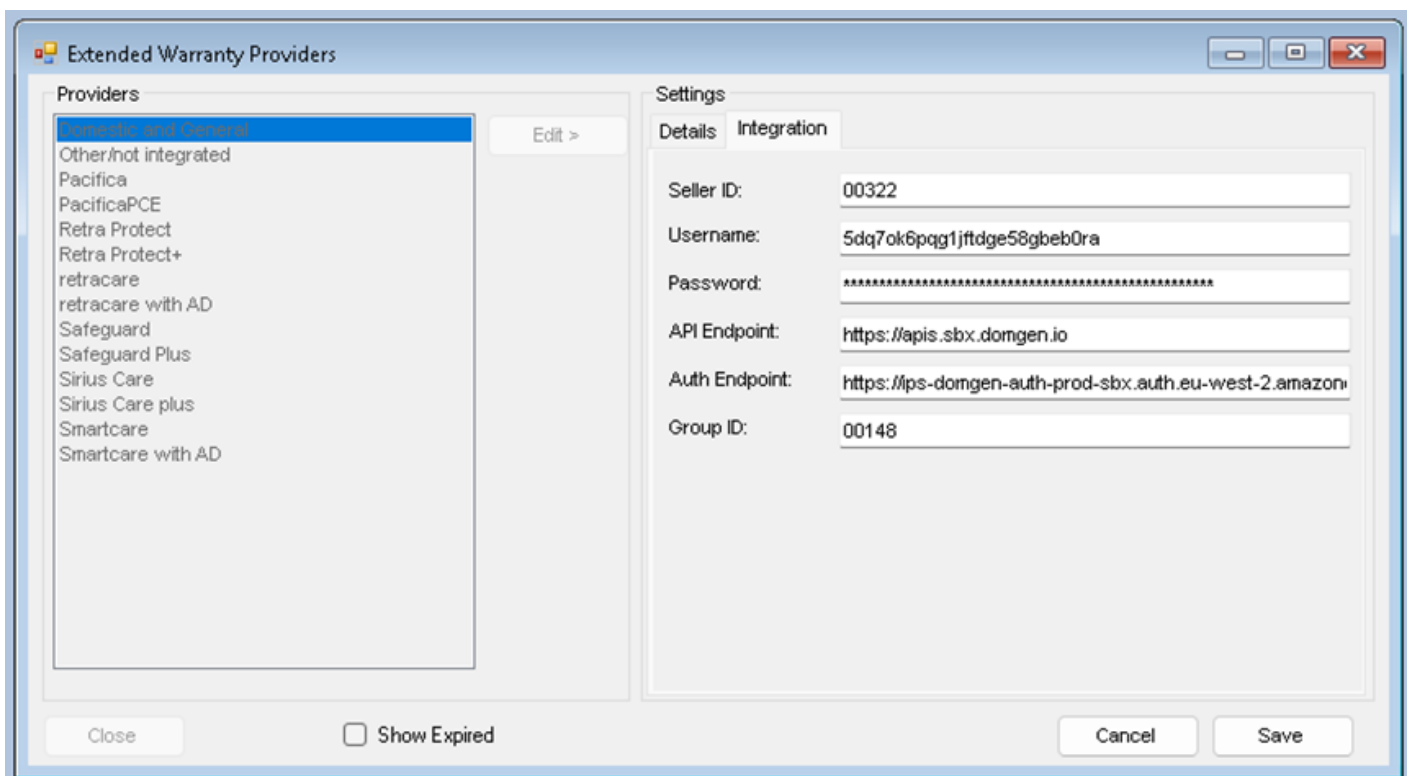
Requires Third- Party GDPR consent – this should be ticked

When complete click 'Save'

**Note: if your system is configured to exports account data, you should ensure that your nominals for warranty sales are set correctly, please see the accounts export guide**

Now click on the Integration tab

Here you need to enter the credentials supplied by Domestic and General, our support or implementation teams may have already entered these for you, if there is already a username and ID's present, you can skip this step

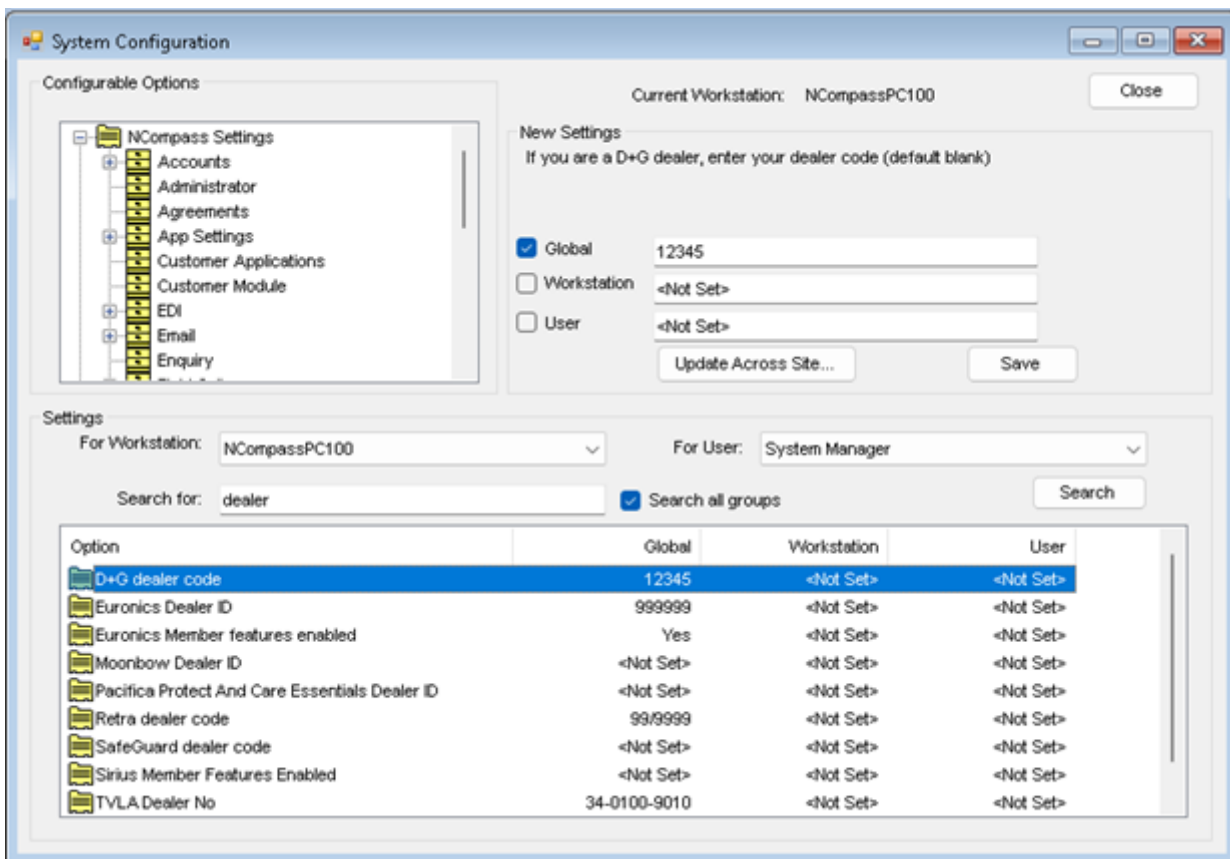


## Setting Your Dealer ID

The dealer id can be set globally or on a branch level

Go to: Tools > configuration

Enter 'Dealer' into the search box and check the 'Search all groups'



Highlight the D+G entry and tick the global box

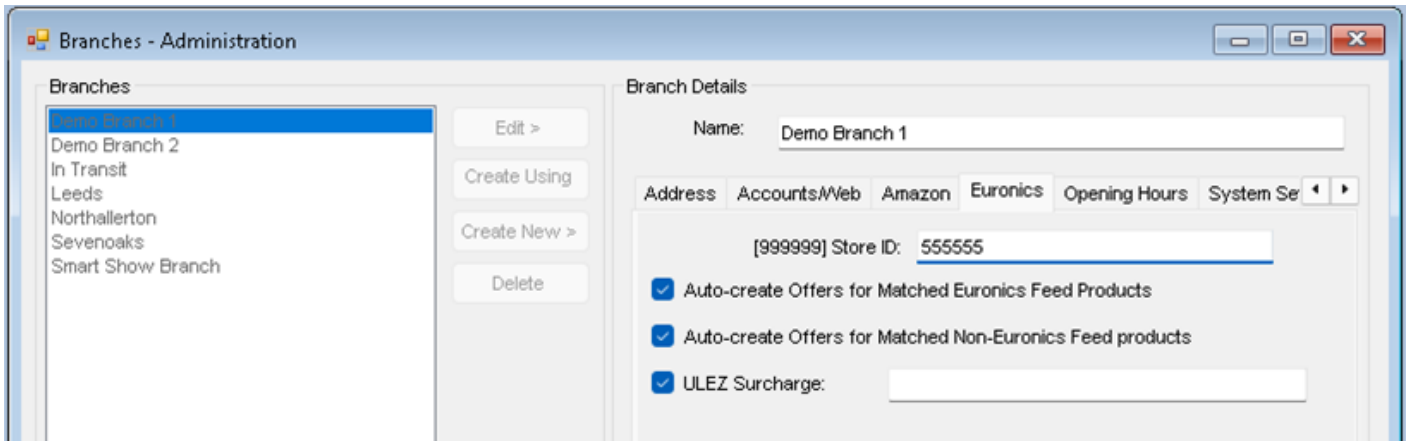
Enter your dealer ID (this will be provided by Domestic and Genera)

- Click Save

You can also set your dealer ID at Branch Level (tis overrides the config setting )

Go to: Administration > Branches

- Select your branch
- Click on the Euronics tab
- Click Edit



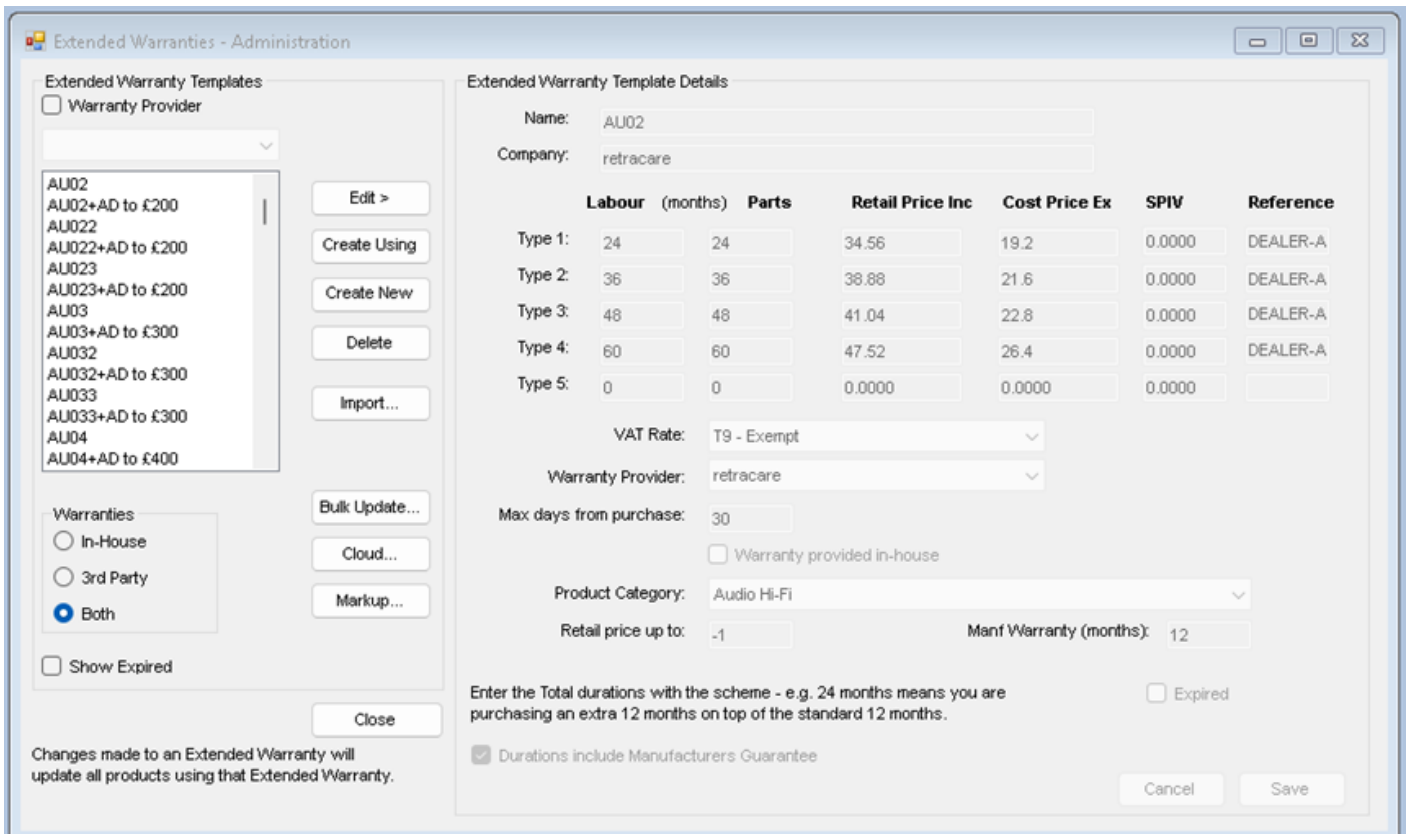
Enter your dealer / Store ID and Click 'Save'

### Updating the warranty templates

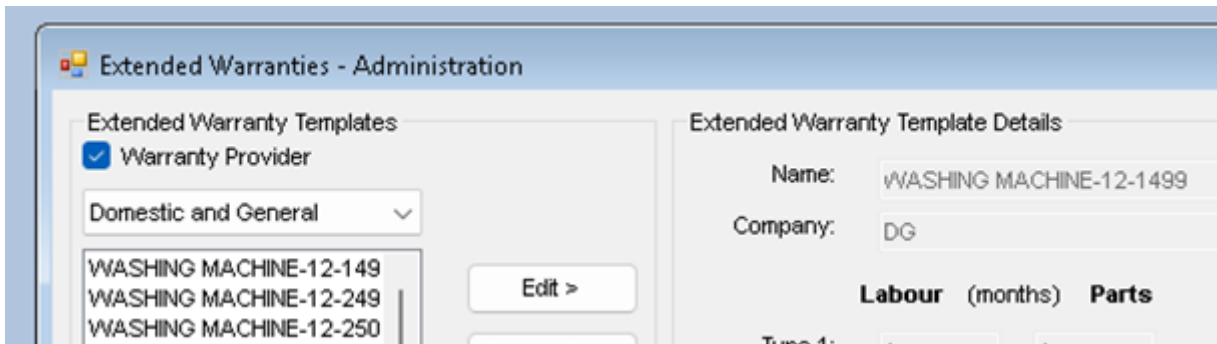
Warranty templates are the list of available warranties for the provider, this is managed in the Calculus cloud, our cloud download allows bulk updates to warranties and the warranty category list

Go to: Administration > Extended Warranties > Templates

This Will open up the extended warranty administration window, and you will see all warranty templates that are currently in the system



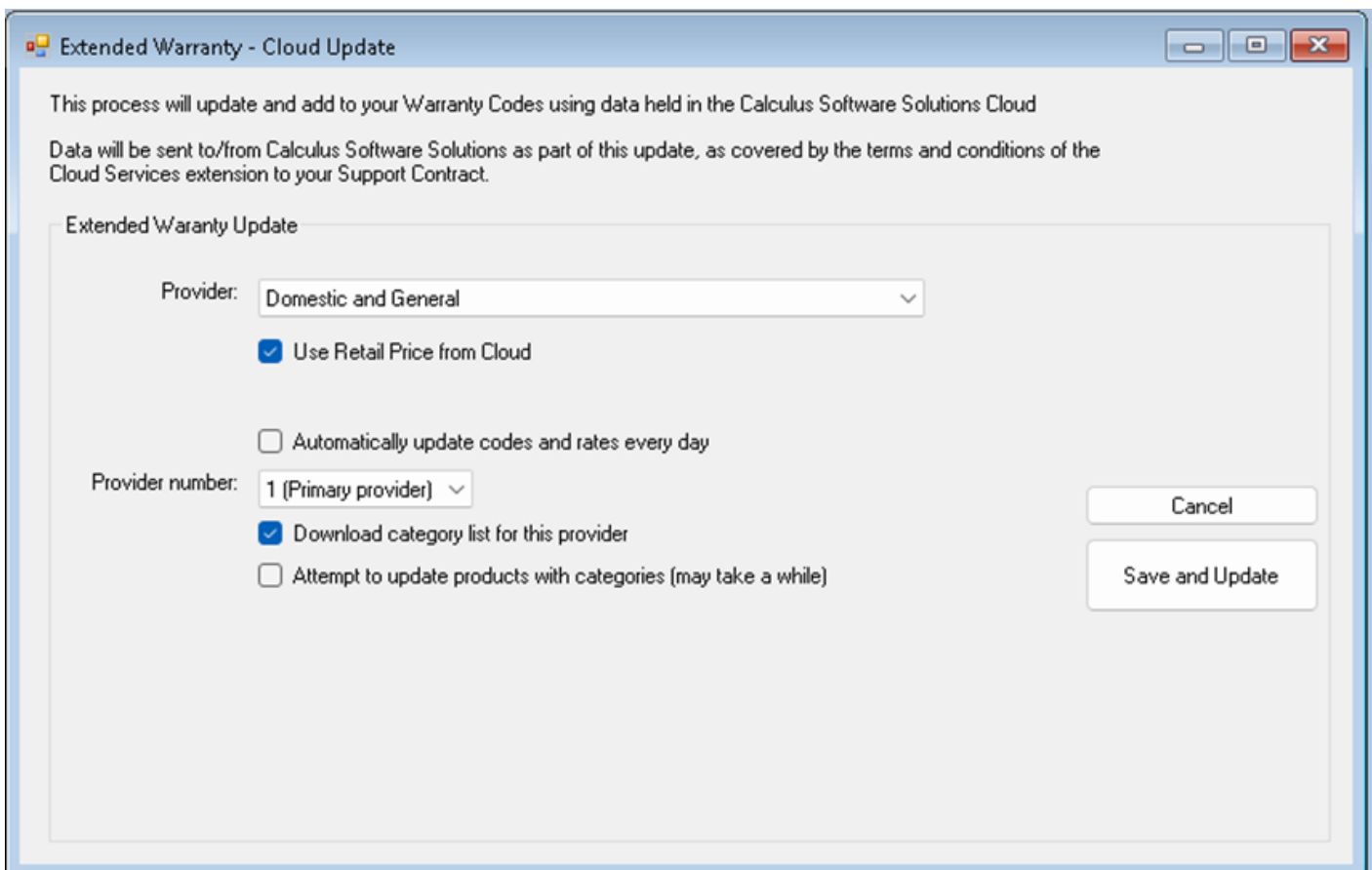
You can filter the view by provider



This administration window allows modification of the warranties, however with Domestic and General, this is all handled by the cloud services.

To download the rates and categories

Click the 'Cloud' button



If this is the first time you have downloaded the rates, we will need to get the rates and categories first before we can add the categories to the products department.

Ensure the Automatically updates codes and rates is unchecked

Download Categories for this provider is checked

Attempt to update products is unchecked

Click 'Save and Download'

Adding Warranty Categories to your products

Categories can be added at product level, but this would mean updating every product you want to sell a warranty for, you can check if there has been a warranty set by checking product details (warranty tab)

The screenshot shows the 'Product Details' window for a 'Standard Product'. The 'Warranty' tab is selected. The window displays various warranty configuration options:

- Manf Labour: 12, Manf Parts: 12 (All entries are specified in months)
- Notes: [Empty text box]
- Try to auto-configure warranty details below... [Button]
- Warranty action at POS:  Prompt for Warranty [Dropdown]
- Extended Warranty:  WASHING MACHINE-12-1499 [Dropdown] +  Show Expired
- Automatically refresh warranty code using the first category below
- Domestic and General:  [Dropdown]
- Inherited: - Not selected
- Maintenance: [None] [Dropdown] +  Show Expired
- Manual: [Empty text box] +
- View Manual Details... [Button]
- Standardise Case

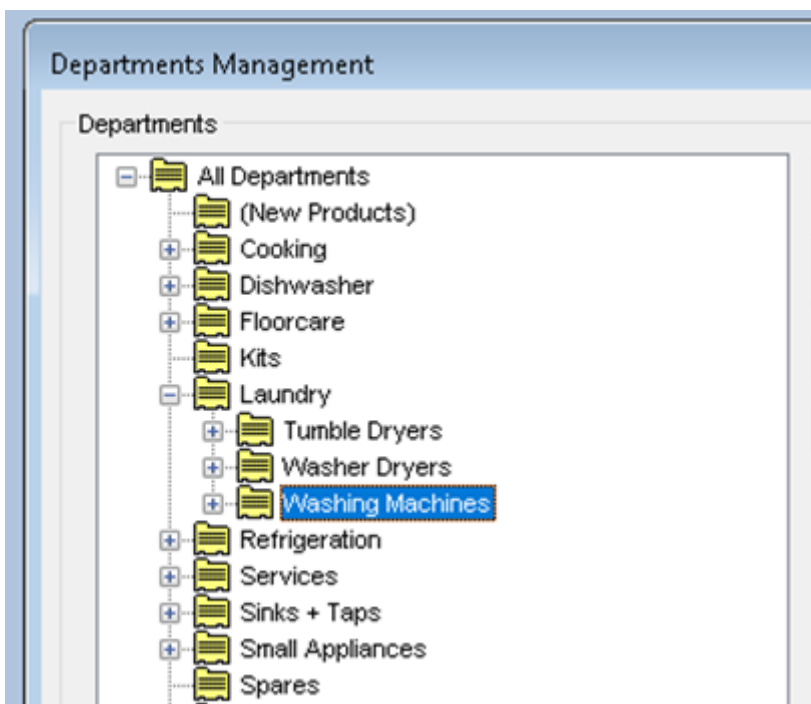
Navigation buttons: << Back, Next >>, Save, Cancel.

**It's much simpler to let NCompass automatically select the warranty for your products, and by default new products will be set to inherit the warranty selection from the department tree**

# Setting your warranty category and action on departments level

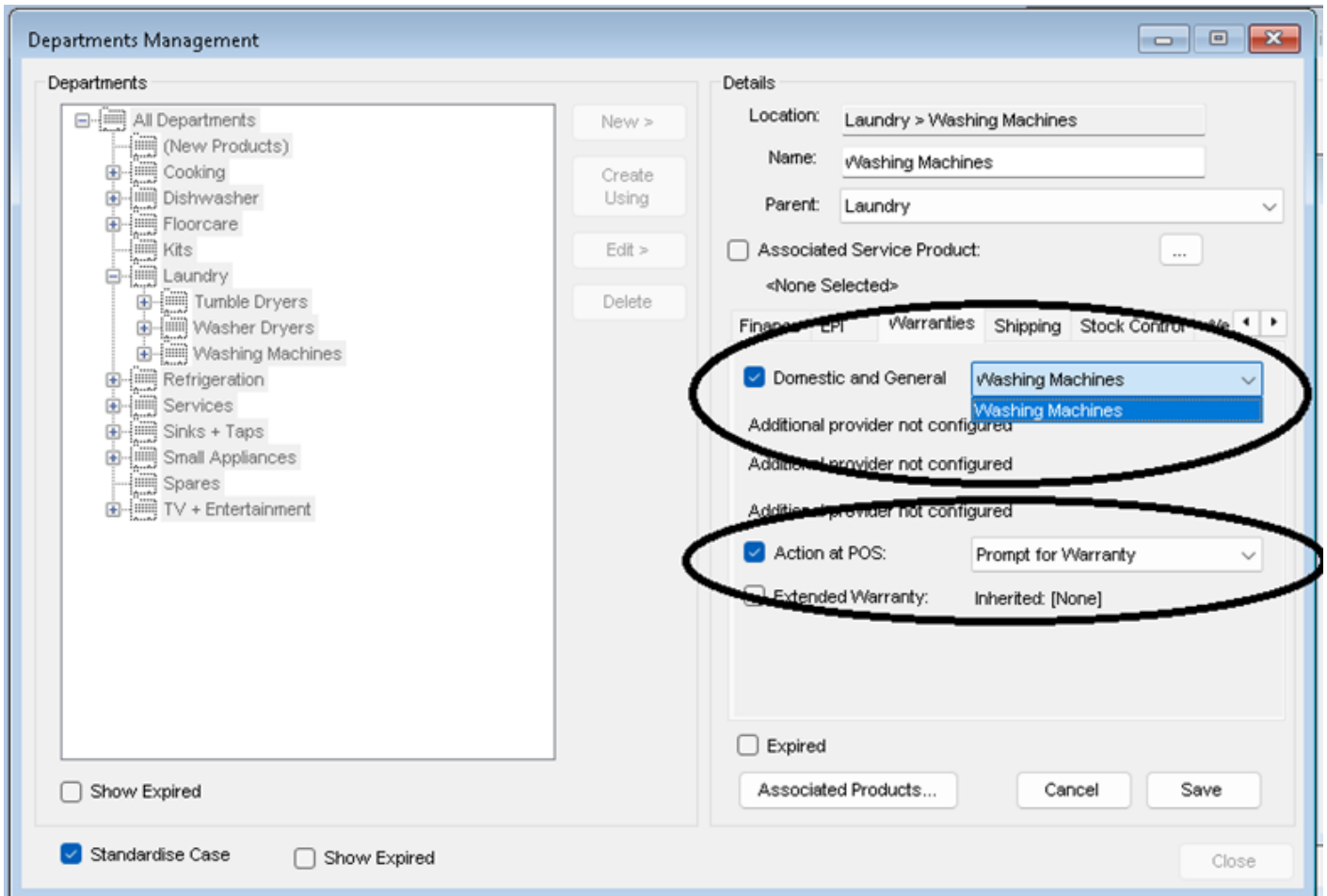
Go to: Administration > Departments Management

For each department you want to add warranties to, select the department where the warranty category changes



In this example above, the split in categories takes place under Laundry, where it splits between tumble dryers, washer dryers and washing machines, each of which have a different Domestic and General Category

Highlight your category and click 'Edit' then select the warranty tab on the right



Set the warranty category for the department and your preferred action at point of sale, we recommend 'Prompt for Warranty'

Click 'Save'

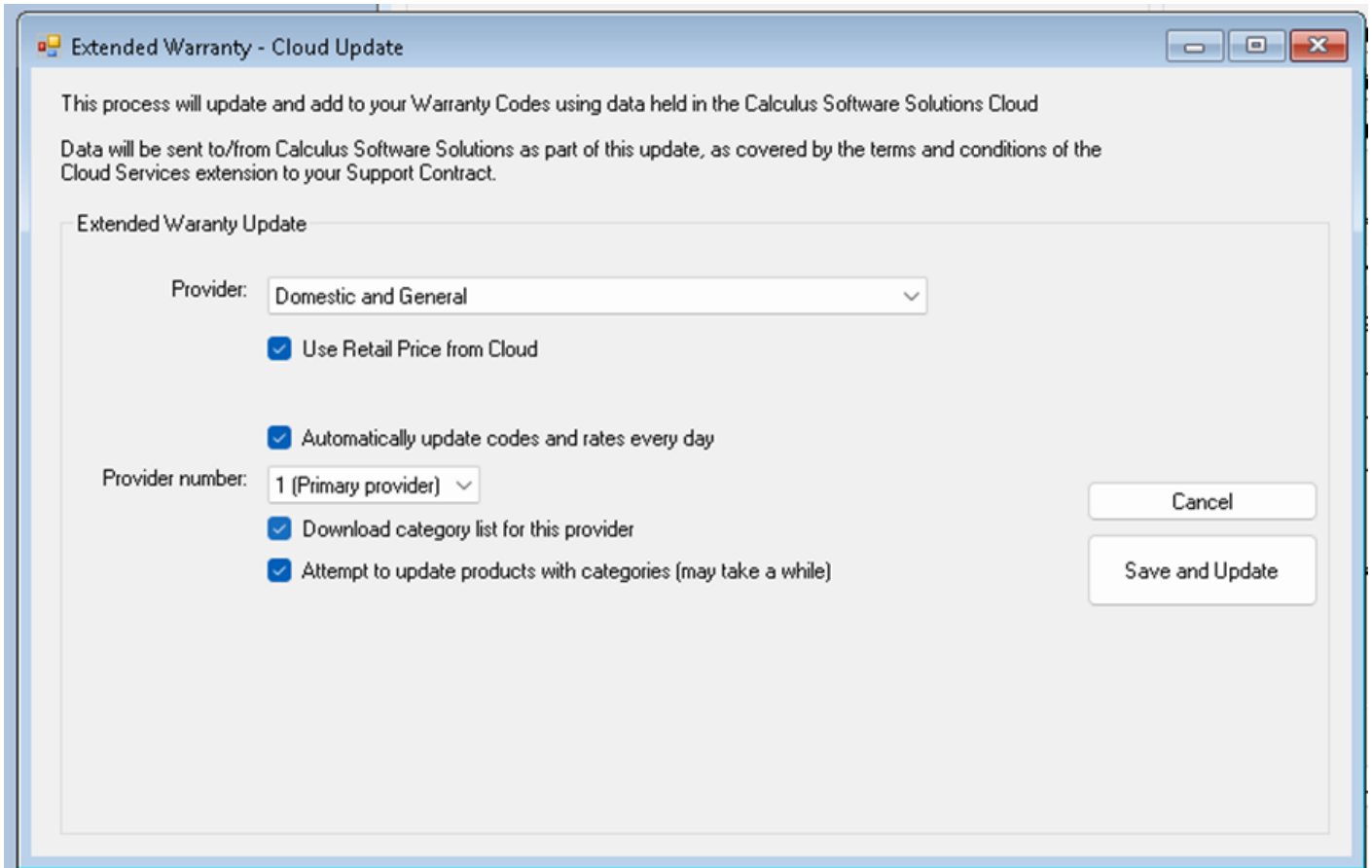
Repeat for all departments where you want to tag / sell warranties

We can now get NCompass to tag warranties against products

Go to: Administration > Extended Warranties > Templates

Click on the 'Cloud' button

Now we will refresh the template and set the tagging



Make sure you have the selection as above ensuring you have selected the correct provider number 1-4 from the dropdown

This process will take some time as it's going to look at all products on your system and tag them with the correct warranty based on category and price

Click 'Save and Update'

You will see progress boxes as the tagging takes place

## Updating Product Prices

Activating and Expiring date-stamped Prices

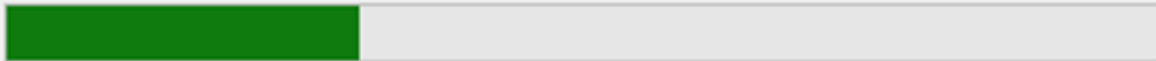
Beko EDG6231W 60cm Double Oven Gas Cooker with Gas Hob - White



## Updating Product Warranties

Checking for Warranty Categories

> Communicating with Calculus Software Solutions <



Extended Warranty - Cloud Update ✕



The update is complete

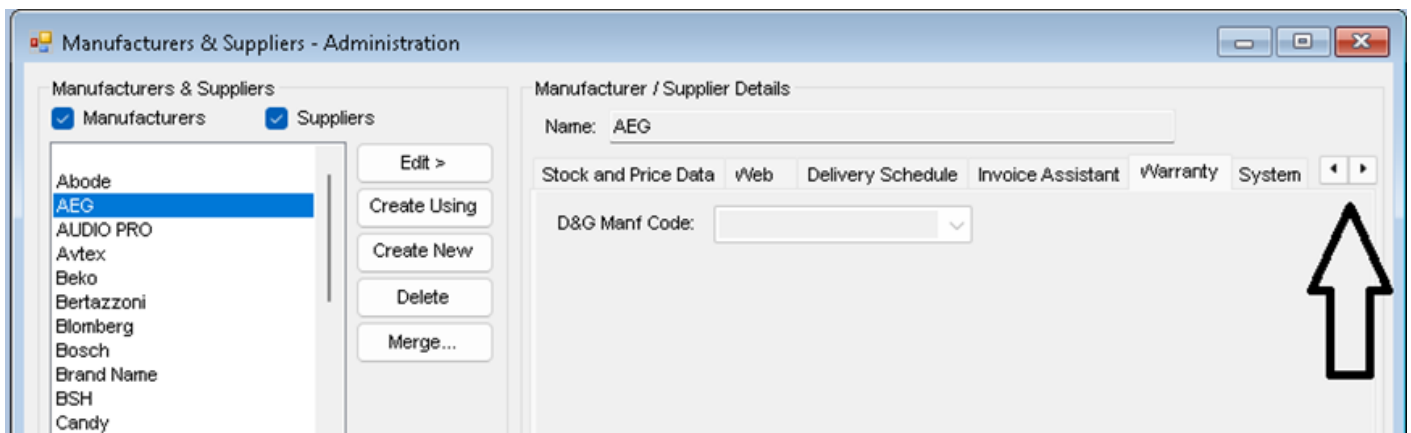
OK

This may take several minutes to complete

# Mapping your Manufacturer

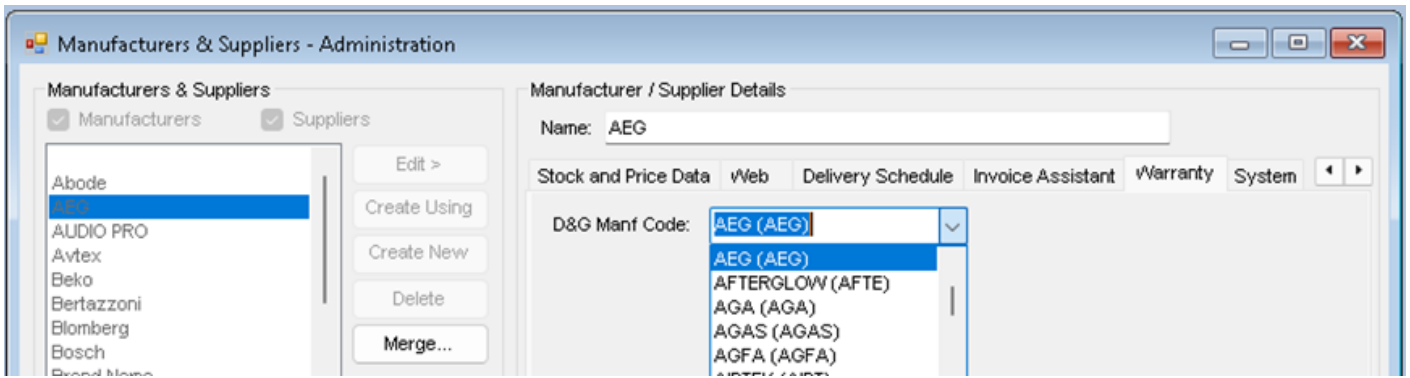
Go to: Administration > Manufacturers and Suppliers

Select your manufacturer and select the warranty tab, note you may have to scroll the tabs to find the warranty tab



Click 'Edit'

Select the correct Domestic and General Code from the dropdown

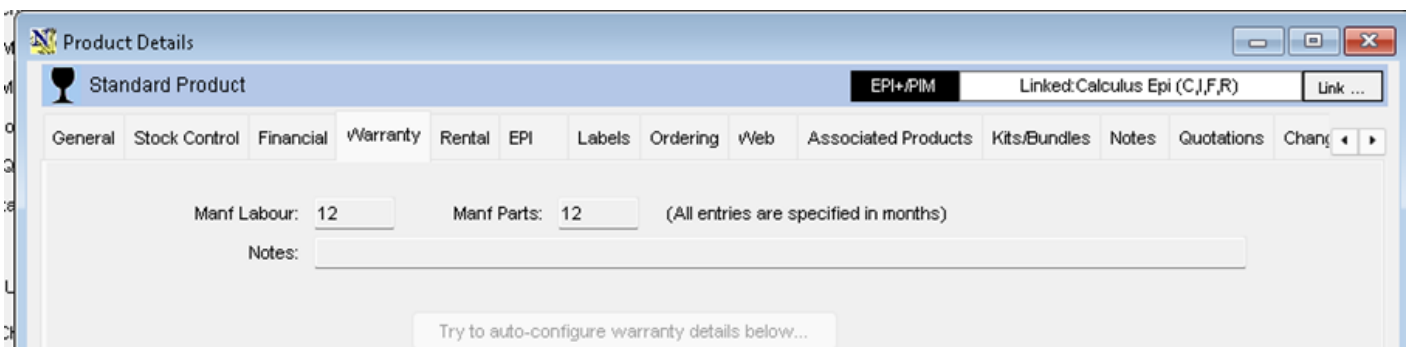


Click 'Save'

### Manufacturer's part and labour periods

It's important that manufacturers parts and labour periods are set correctly on products, The Euronics product feed will normally supply these details, if you have product data in your system that is old or from another source you must check that these periods are set

You will find these under product details on the warranty tab.



If not correct the wrong warranty may be offered

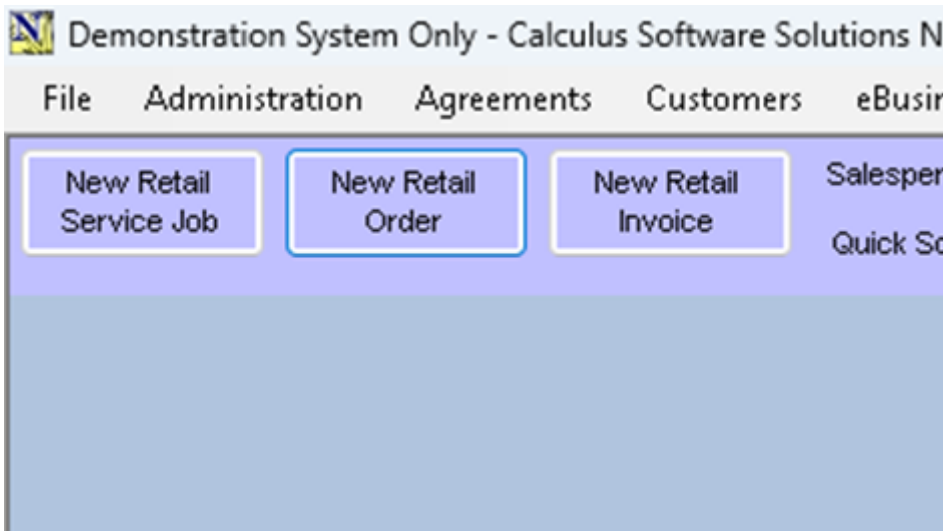
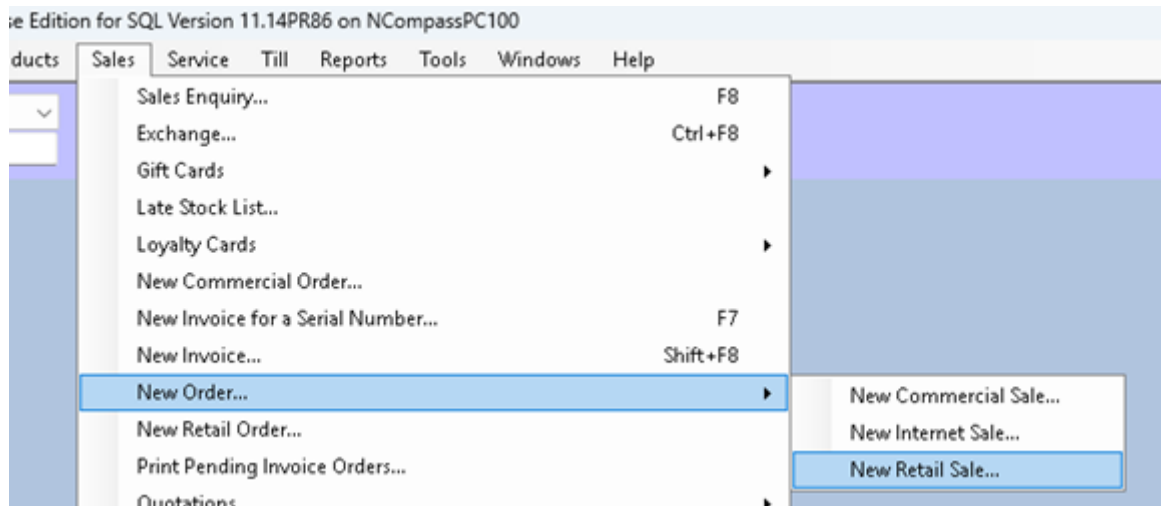
### Sales Process

NCompass can 'Prompt' the salesperson to add the warranty to the sale each time an item is added to the sales order or invoice.

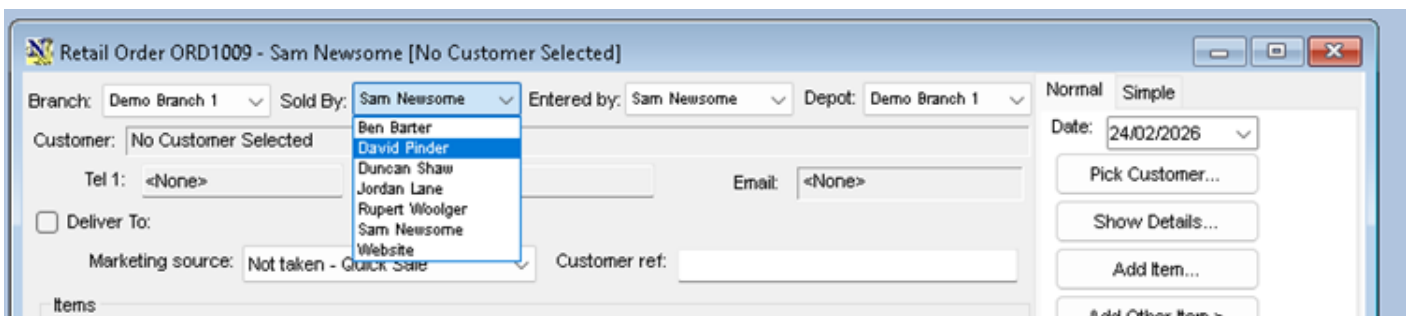
If you want to sell a warranty for a product that's already sold, this is also supported

### Selling warranties with the products

Start the sale process in the normal way usually this is via a sales order



Sign into the sales order window in the normal way



Then Select Pick Customer

Customer Enquiry for Retail Order ORD1009 - Sam Newsome [Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD]

**Search Details**

Surname: pin Search

Forename: SmartMatch

Telephone:

Postcode: ng

Company / Address:

Email:

Account No.:

Branch: ▾

Category: ▾

Date of Birth: To Over 18

Account/Cash Customers ▾

CustomerID: NCCRM/ No Customer

Include Expired Entries

Enter the details to match - any left blank will be ignored.  
CustomerID is just the number portion, and must be exact;  
Address will find the entry anywhere in the address fields;  
Other items will only match items beginning with the data entered.

If you have a customer card, scan or swipe it to find that customer

**Current Matches (Exact)**

Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD

Details... Items... History... Select

Ledger... Agreements... Sales... Service Jobs...

New... Cancel

Search for your customer

If your customer is already in NCompass, Highlight and click Select

If your customer is not found

Click 'New'

Mr Pin, NG - New Customer

CustomerID: <No ID Available> Hot-links Tools

Customer Details

	Title	Initials	Forename	Surname
Name:	Mr			Pin

Company/  
Address:

County: Postcode: NG !

Country: [Not set] v

Summary: Mr Pin, NG

Telephone: Two:

Mobile No: 0799989563131 Fax:

Main Email: PINNNNN@test.com

Alt Email:

Website:  Expired

Web Login... Show Map... Send Text...

Save Cancel Attachments... Extra >

Standardise Case  
 Show Expired

Fill in the customer details and then click Save

**Note:** its important you get full customer details, full title, initial, Surname, correct address, postcode email and telephone numbers

Click 'Save'

Now Add your product to the sales

Click 'Add Item'

Product Enquiry for Retail Order

Search Details

Manufacturer:  Search

Model/Part No:  Advanced

Stock/Serial No:

Quick Search:

Retail Price from:  to

Supplier:

Updated After:  23/02/2026 Before:  24/01/2026

Channel

Product Grade

New Stock  PO for Stock Only

S/H Stock Only  Include Expired Products

Barcode/Shortcode:  Scan

Fill in any combination of the above boxes, or scan a bar-code.  
Use a \* to match zero or more characters.  
Use a ? to match exactly one character.  
You only need complete the first part of the manufacturer or model

Standard Detailed

Product	Price	B/Free	C/Free	C/BO	C
Blomberg LWA29461W 9kg 1400 Spin SpinSave ...	429.99	8	8	0	0

Branch: Demo Branch 1 - available stock

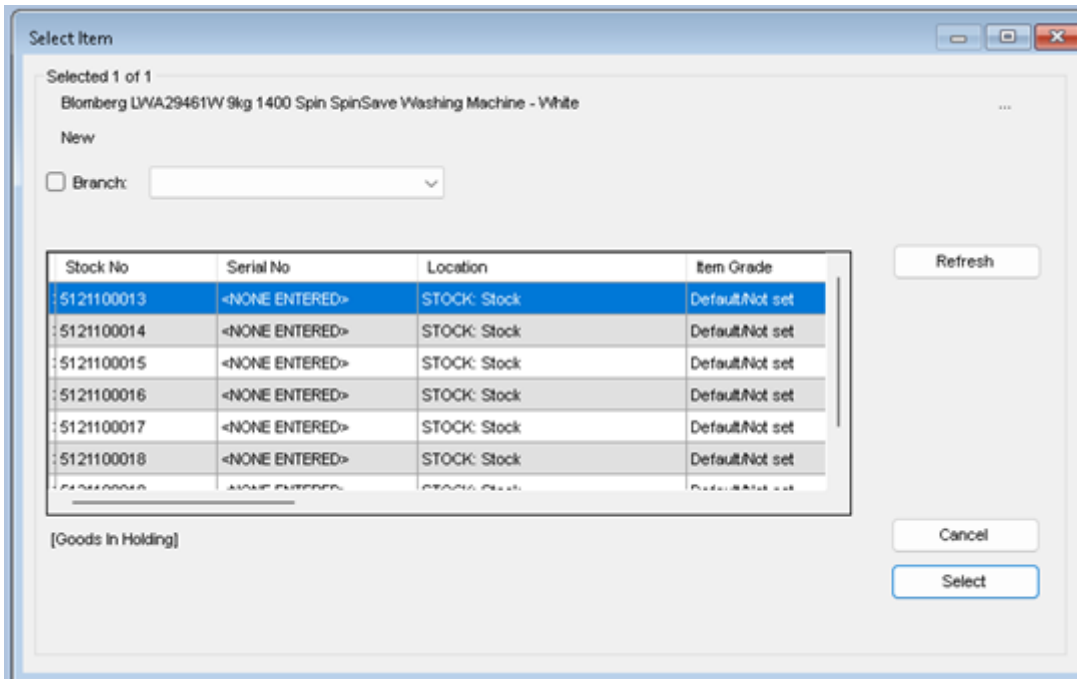
Rental Price: No rate set

Retail Prices: Retail [1.00+]: 429.99 ex VAT: 358.33

More > Variant Matrix... Link EPI+ Product(s)...

Select Stock... Product Info... Create Special Order... Cancel

Search for your item the click' Select '



Depending on your system settings, you may or may not be required to pick a stock number, if required pick the first available stock number

Highlight and Click 'Select'

You will then be presented with the price confirmation screen

Item Price

Item Quantity

Quantity required: 1

Allocate stock from: Pick stock number then select price

Stock Number: 5121100013 Pick Stock...

Price per item

Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White

Our List Price: Retail [1.00+]: 429.99

Discount %: 0.0 Discount Inc VAT: 0.00 ...

Unit Selling Price Ex VAT: 358.33

Unit Selling Price Inc VAT: 429.99

New: Default/Not set

This is an Agency product for Euronics Agency

Cancel Confirm

If you're changing the price, you must do it before proceeding, as the next step will check the warranty category and retail price

Click 'Confirm'

**If your system is set to not to prompt for warranties, you will be returned to your sales order, however its our recommendation that 'Prompt for Warranty' is turned on for all product categories, and the next window that opens is a list of available warranty purchase options**

The Warranty window will do a live call to Domestic and Generals system to check the warranty rates and update if required, this should only take a few seconds and then you will be presented with the list

Extended Warranty Options

**Item Details**

Product: Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Price: 199.99  
 Stock No: 5121100013 Manufacturer's Parts: 36 Manufacturer's Labour: 36  
 Serial No: <NONE ENTERED> Listed Warranty Scheme: WASHING MACHINE-36-249

The following options are suggested:

**Extended Warranty**

Scheme: WASHING MACHINE-36-249  Show Expired  
 Max days for scheme: 30 DOP: 24/02/2026

	Labour (months)	Parts (months)	Price	Availability
<input checked="" type="radio"/> 5 years:	60	60	143.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	

Durations are the total cover, including existing manufacturer warranty

**Purchase Details**

List Price: 143.00   
 Price includes accidental damage @ £0.00  
 Voucher Code:   
 Price ex VAT: 119.17 Price Inc VAT: 143.00

There may be more than one warranty purchase option available

This will show both term warranty.

36-month, 60-month, and the term includes the manufacturers original warranty

And monthly warranties, where the term will be set to 1 month and the price shown is the monthly price

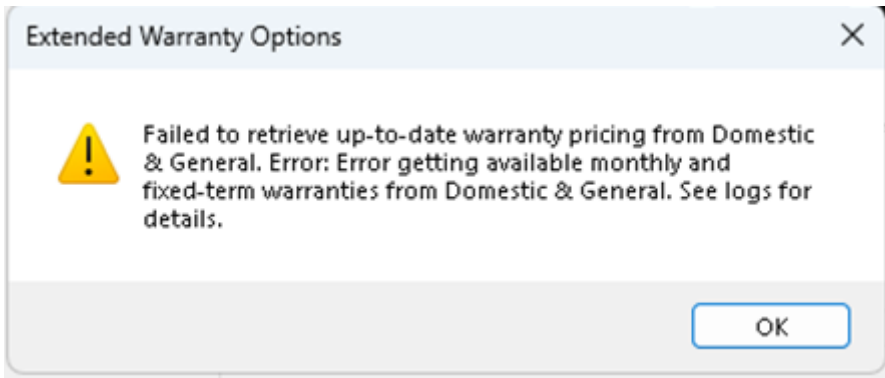
Select the desired warranty option and the price will update, not you should not try and change the warranty price, if you do the warranty submission may be rejected

Click 'Confirm Warranty Purchase' to continue with the sale and include the selected warranty

Or

Click 'Cancel – No Warranty required'

Note: if for any reason there is no access to Domestic and General's systems the rate will not be able to be confirmed, and you will not be able to sell the warranty



**If this happens, check your internet access and the service status with Domestic and General**

You can always return to the sales order later to add the warranty to the sales order.

### **Complete the IPID requirements**

**IDIP** = Insurance **P**roduct Information **D**ocument

The PDF is stored the normal reports folder, and can be printed emailed or viewed directly from NCompass

This document can be different based on the warranty type, Monthly / Term

, It's a requirement that the customer gets a copy of the IPID and has a chance to read through the basic terms before accepting the warranty sale, Domestic and General may also require confirmation of any questions or statements before the warranty can be purchased, so the following window will open

Domestic And General Sale Details

Questions

Important: remember to issue IPID to customer and give them time to read it.

example question 2

How would you like to receive your documents?

Post

Email

Both

Information Document

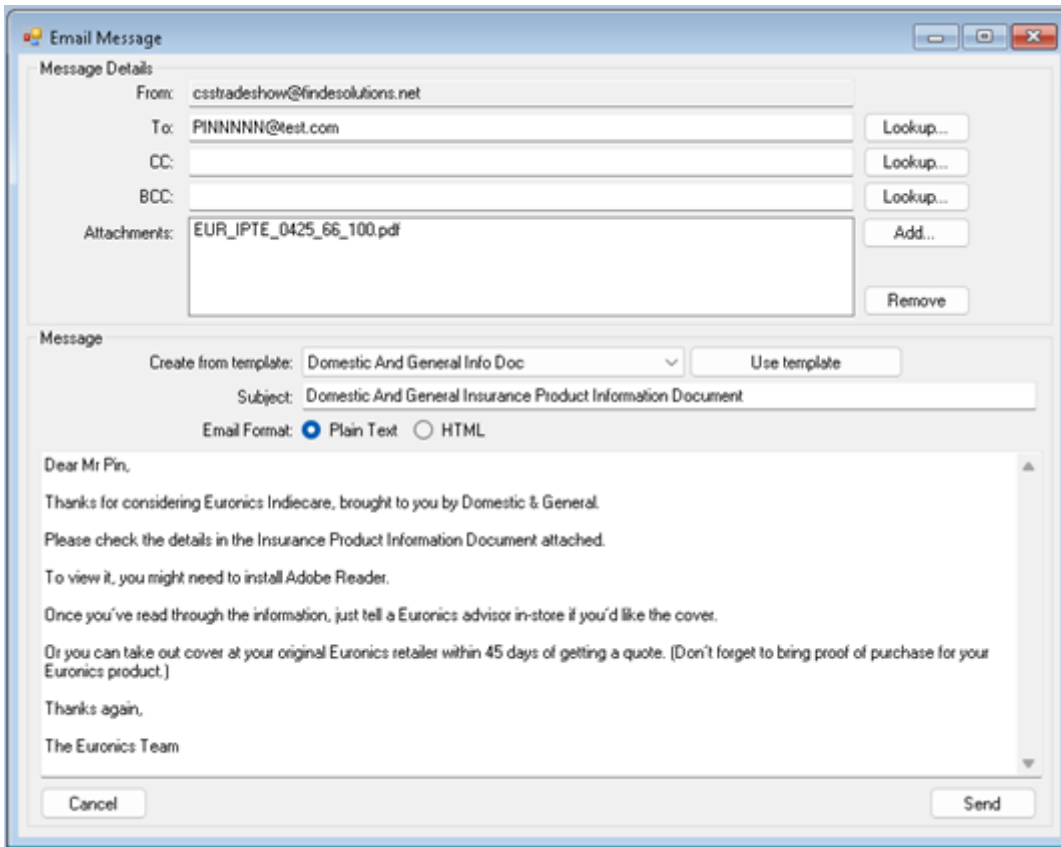
Confirm Any Questions

Select the warranty Document delivery method (this defaults to both)

If there are any questions or statements that require confirmation, they must be read out to the customer and then confirmed, normally for Domestic and General the only question will be to confirm that the customer has received read the IPID

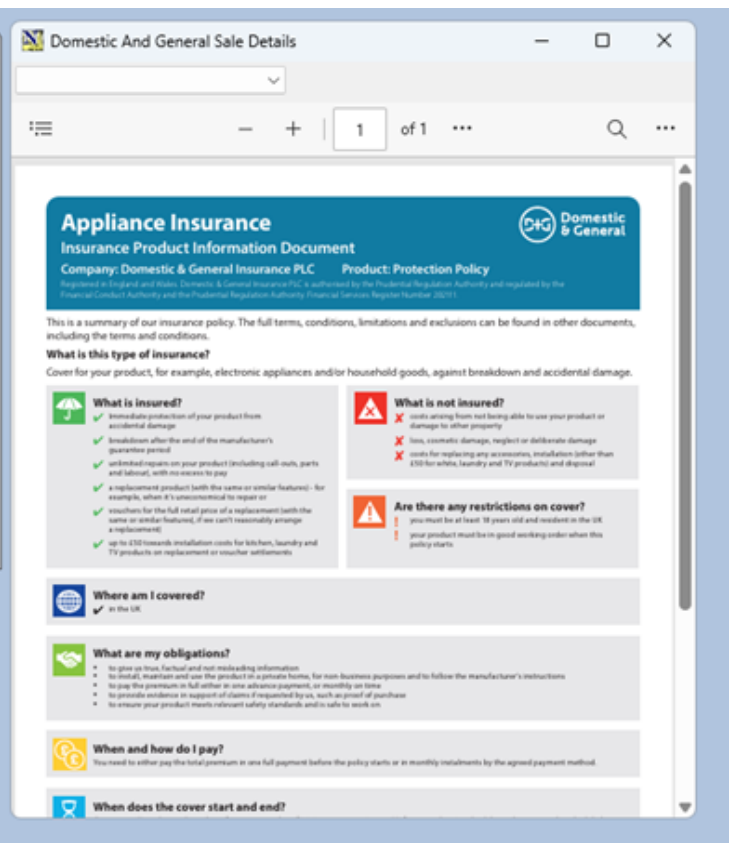
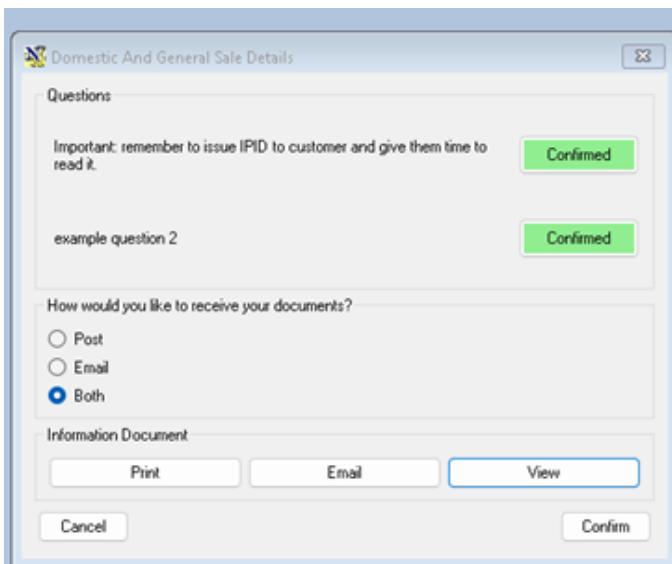
Print Will send the correct IPID PDF to the default A4 Printer

Email will open up the NCompass Email client with the customers email address and a email template with the correctly worded text, and the PDF attached



Click 'Send'

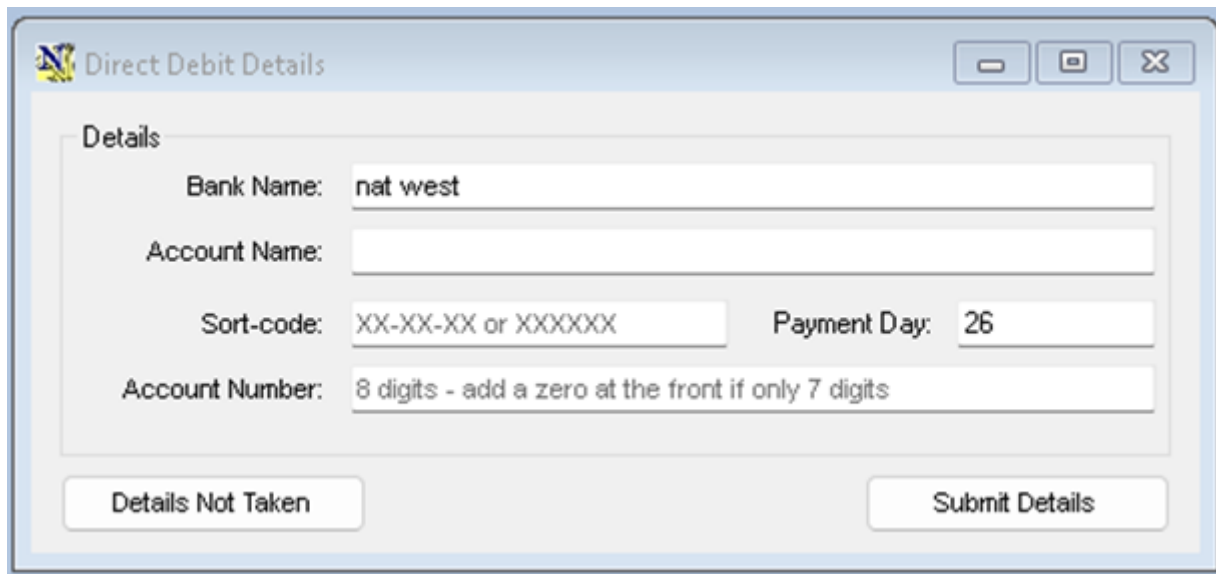
View will open the PDF in a mini-Browser



Once the customer has received / viewed the IPID you can Continue

Click 'Confirm'

If a monthly warranty has been selected, you will be prompted to collect the customers Direct Debit details



Direct Debit Details

Details

Bank Name: nat west

Account Name:

Sort-code: XX-XX-XX or XXXXXX Payment Day: 26

Account Number: 8 digits - add a zero at the front if only 7 digits

Details Not Taken Submit Details

Enter the customer bank details

The payment day defaults to the current day, the customer can have the direct debit taken on any day from the 1<sup>st</sup> to the 28<sup>th</sup>

You cannot submit monthly warranties without bank details, if click 'details not taken', you will be prompted again when confirming the sale

Retail Order ORD1009 - Sam Newsome [Mr Pin, NG]

Branch: Demo Branch 1 Sold By: Sam Newsome Entered by: Sam Newsome Depot: Demo Branch 1

Customer: Mr Pin, NG

Tel 1: <None> Mobile: 0799989563131 Email: PINNNNN@test.com

Deliver To: Marketing source: Customer ref:

Items - 1 item total over 2 lines

Product	Stock No	Serial No	Discount Group	Selling Price	Available From
Blomberg LWA29461W 9kg 1400 S...	5121100013	<NONE ENTER...	B - LIST PRICE I...	199.99	24.02/2026
Extended Warranty For Blomberg L...	5121100013	Parts: 60 Labo...		143.00	

Quantity: 1   1 item, 2 lines **Total: £342.99**

No status; Assigned to Duncan Shaw

Payment: 342.99

Defer Completion **Balance: -£342.99**

ORD1009  Gift Receipt

Back at the sales order screen, you can now continue to add more products, if additional products also have a tagged warranty, the same process will be available for each product line

When the sale is complete

Click 'Confirm'

Complete Sale - ORD1009

Are you sure you wish to complete this Sale?

Delivery

Order Balance: 0.00

All items taken now

All items being collected later

All items being delivered by courier

All items being delivered by in-house delivery

Leave the current delivery/collection arrangements as they are

Advanced - a mixture of the above or raise an additional delivery note

None - this will be arranged later

Surveys

There are no surveys to complete

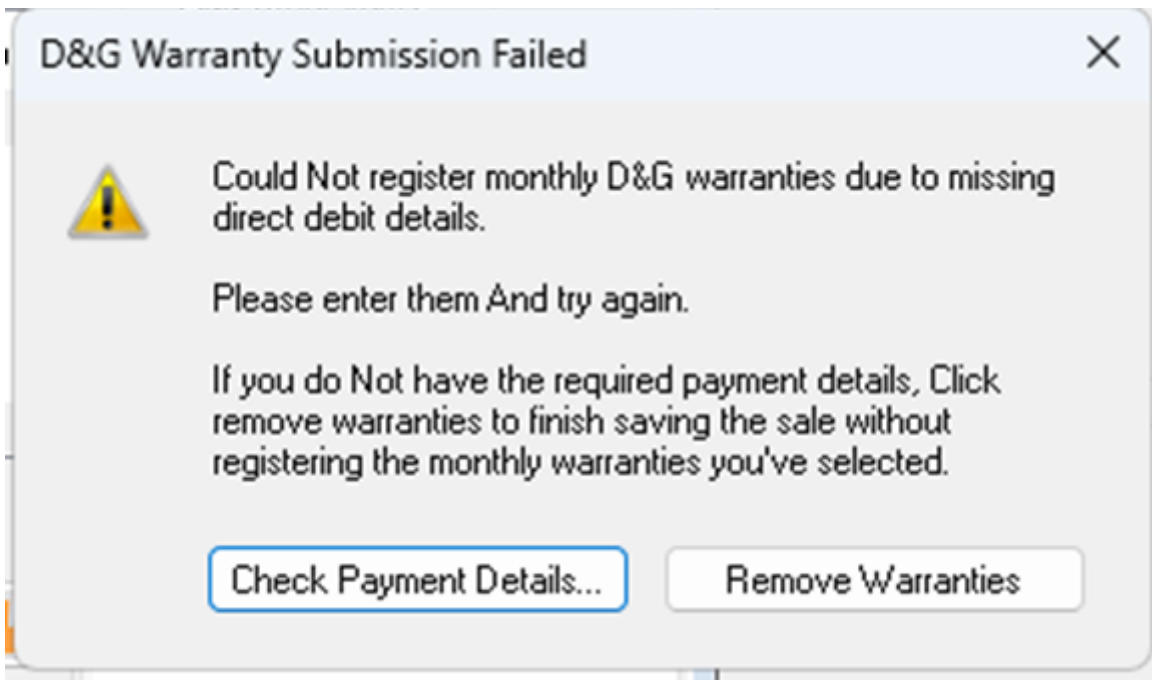
Receipt

Normal settings will be used to output a receipt

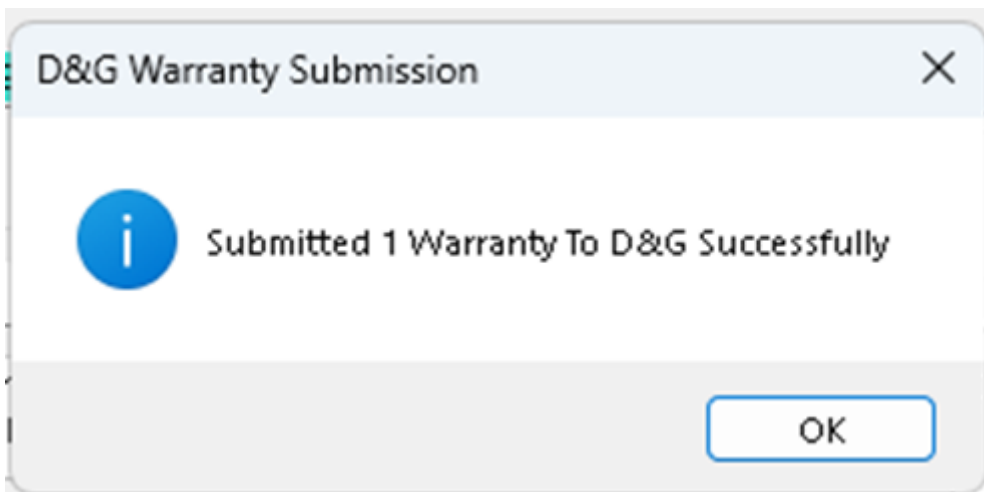
Select the item delivery / Shipping / Collection options required

Click 'Complete Sale'

If you have not taken the bank details and there is a monthly warranty present on the sale you get one final chance to enter them, monthly warranties can not be submitted without bank details



The Warranty Submission will now take place, there will be a short pause while NCompass connects to Domestic and Generals systems and submits the warranty, Once complete you will get a confirmation



If the Warranty Fails to submit you will be given a reason

The Warranty is automatically removed for the sales order and is replaced with a sundry line indicating the submission has been cancelled

Deliver To:

Marketing source:  Customer ref:

Items - 2 items total over 2 lines

Product	Stock No	Serial No	Discour
Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White [Dem...	5121100014	<NONE ENTER...	
D&G Warranty Submission Failed, Warranty Not Processed			

Selling a warranty for a previously sold product

Start a new sales order

Add the customer on to the sales order

Click the Warranty button and select the option 'For another item'

Retail Order ORD1005 - Duncan Shaw [Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD]

Branch:  Sold By:  Entered by:  Depot:

Customer:

Tel 1:  Mobile:  Email:

Deliver To:

Marketing source:  Customer ref:

Items

Product	Stock No	Serial No	Discount Group	Selling Price

Quantity:

No status; Assigned to Duncan Shaw 0 items, 0 lines **Total: £0.00**

Normal Simple

Date:

This will bring up a list of the customers previous purchases

Customer Product List - Sold Items without Extended Warranty

Customer:  Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD Pick Customer... Show Details...

Sale/Agreement Number:   Include returned items

Product:  <Click Pick Product, or scan a barcode now> Pick Product... Search

Include 'No Customer Selected' Show first: 200

Date	Type	Status	Reference	Salesperson	Price	Product	Manf	Manf	Extended Parts	Extended Labour	S
24/02/2026	Sale	Current	INV11172	Duncan S...	£429.00	Bosch PIE631BB5E 59.2cm Induction Hob - Black	24/02/2031	24/02/2031			51
24/02/2026	Sale	Current	INV11168	Duncan S...	£149.99	Bosch BCHF220GB Serie 2 2-in-1 Cordless Vacuum Cleaner - 44 Minutes ...	24/02/2028	24/02/2028			51
24/02/2026	Sale	Current	INV11167	Duncan S...	£339.73	Beko CEG7302B Bean To Cup Fully Automatic Espresso Machine - Black	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£366.91	Bosch WAN26282GB Capacity 8kg, 1400 rpm, SpeedPerfect, Active Wat...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£843.52	Bosch WAW26750GB Capacity 9kg, 1400 rpm, ActiveOxygen, Active Wat...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£416.42	Indesit EWDE861483W EWDE 861483 W UK 6kg Washer Dryer - White	24/02/2028	24/02/2028			51
24/02/2026	Sale	Current	INV11165	Duncan S...	£399.00	Bosch WAN26250GB Capacity 8kg, 1200 rpm, VarioPerfect, EcoSilence D...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11165	Duncan S...	£759.00	Bosch WTW67561GB Capacity 9kg, Heat Pump, SelfCleaning Condenser, ...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11163	Duncan S...	£269.00	Beko BMN3WT3821W 8kg 1200 Spin RecycledTub Washing Machine - W...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11158	Duncan S...	£269.00	Beko BMN3WT3821W 8kg 1200 Spin RecycledTub Washing Machine - W...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11153	Duncan S...	£429.99	Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White	24/02/2029	24/02/2029			51

The list shows all stock controlled items the selected customer has purchased or rented. If Status is Expired, the item has been returned.


Barcode  Scan Select Item History... Close

Highlight the item and Click Select

Proceed with the warranty purchase as above

Domestic and General only allow the sale of the warranty up to 45 days after the product sale, if you attempt to sell a warranty outside of this period, you will be blocked

Extended Warranty Options

 You cannot purchase this Domestic and General warranty for an item purchased more than 45 days ago.

OK

### Promoted Warranties

There is provision in the rates table / API call for promoted warranties, if a promoted warranty is available it will be shown in the warranty selection screen, the warranty name will be prefixed with [Promo]

The availability field will show when the promotion is valid until and under the selection table the promotional test will be shown

Max days for scheme: 30 DOP: 25/02/2026

	Labour (months)	Parts (months)	Price	Availability
<input checked="" type="radio"/> [PROMO] 2 years:	24	24	216.90	Available until 10/05/2026
<input type="radio"/> 3 years:	36	36	275.40	
<input type="radio"/> 4 years:	48	48	312.30	
<input type="radio"/> 5 years:	60	60	349.20	
<input type="radio"/>	0	0	0.00	

Durations are the total cover, including existing manufacturer warranty

**20% warranty purchase discount**

Purchase Details

List Price: 216.90 Cancel - No Warranty Required

## Cancelled Transactions

As warranties are sent real time to Domestic and General, you must ensure that if the transaction is cancelled you inform them of this.

This could occur in the following scenarios

- Sales order is edited and the warranty or item and warranty removed

- Sales order is completely cancelled

- Warranty refunded from invoice

- Items and warranty refunded from invoice

In the first two scenarios, domestic and general will have received a valid warranty submission, but its start date will be set in the future

In the later scenarios, the warranty will have been submitted, and the warranty start date triggered, so the warranty will be live

Please see the section on warranty submissions to see the submission status

In all cases you should contact the Domestic and General dealer helpline and cancel the warranty

**The is no option for NCompass to automatically cancel these in version 11.14.00**

If a warranty is removed from a sales order, refunded or the sales order cancelled it will show in the submission enquiry screen

Go to : eBusiness > Extended Warranty Submissions

Select the provider from the drop down selection

The screenshot shows a software window titled "Extended Warranty Submission". It has a "Settings" section with three dropdown menus: "Company" (empty), "Provider" (set to "Domestic and General"), and "Unsubmitted" (checked) vs "Submitted" (unchecked). A "Search" button is to the right. Below is a "Warranty Sales" table with columns: Company, Description, Price, Customer Name, and Sale Date. The table contains three rows, all for company "DG" and customer "Mr J Fisk, Address1, Address4, TN6 2SE". The first row is highlighted in blue and has a price of 229.00. The second row has a price of 229.00. The third row has a price of -229.00. Below the table, it says "Total cost price: £0.00 [3]". At the bottom, there are three buttons: "Auto Submit All" (with text: "Register these warranties automatically with your provider. If successful they will be marked as submitted automatically."), "Mark as Manually Submitted" (with text: "Mark the selected warranty as manually registered. This will NOT register it for you with a provider."), and "Mark All as Manually Submitted" (with text: "Mark all listed warranties as manually registered. This will NOT register them for you with a provider."). A "Close" button is in the bottom right corner.

Company	Description	Price	Customer Name	Sale Date
DG	Cancelled: WASHING MACHINE-12-499	229.00	Mr J Fisk, Address1, Address4, TN6 2SE	23/02/2026
DG	Removed: WASHING MACHINE-12-499	229.00	Mr J Fisk, Address1, Address4, TN6 2SE	23/02/2026
DG	Refund: WASHING MACHINE-12-499	-229.00	Mr J Fisk, Address1, Address4, TN6 2SE	23/02/2026

## Warranty Submissions

The warranty is submitted at the point of sales however the contact start date is set in the future, this is due to fact we do not know the delivery / collection date at the point of submission.

The normal process is to complete the delivery or collection in your normal way, goods must be marked as taken, collected or delivered

Once the field call is marked as completed, you can invoice the sale or if you have auto invoicing turned on, it will invoice automatically

After the sale is delivery complete and invoice an update will be sent to Domestic and General with the delivery / contract start date

## Checking submissions

Go to : eBusiness > Extended Warranty Submissions

Extended Warranty Submission

Settings

Company:

Provider: Domestic and General

Unsubmitted  Submitted

Warranty Sales

Company	Description	Price	Customer Name	Sale Date	Sale	Submitted	Provider ID
DG	WASHING MACHINE-36-499	179.00	Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfi...	24/02/2026	INV11142	24/02/2026	SN40003259
Domestic and General	DG-DW-12-500-1	0.00	Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfi...	25/02/2026	INV11177	24/02/2026	5MZ0001006

Total cost price: £0.00 [2]

Register these warranties automatically with your provider. If successful they will be marked as submitted automatically.

Mark the selected warranty as manually registered. This will NOT register it for you with a provider.

Mark all listed warranties as manually registered. This will NOT register them for you with a provider.

Select the provider from the drop-down selection

Check Submitted

You will now see all the submitted warranties for that provider

Note: this screen only shows warranties that are submitted and active, i.e. when the start date has been sent

This Window is subject to further changes

## Warranty Sales Reports

There are a range of warranty reports, both summery and detailed

Go to: Reports > Sales > Warranty Sales

Warranty Sales Report

Report Settings

Style: Detailed by Branch, Salesperson, Customer Category

Invoices

Orders

Preview

Print

Report Filter

Branch:

Customer Category:

Date: Dated on or after: 01/01/2026 and on or before: 31/01/2026

Inhouse/External:  In-house  External

Salesperson:

Warranty Provider: Domestic and General

Help Close

- Select if you want to report on warranties on sales invoices or sales order
- Select your report criteria
- Select your report date range
- Select the warranty provide

Preview or print your report

			Warranty		Insurance		Total			
			Cost Ex	Retail Ex	Margin	Retail Ex	Retail Ex	Retail Inc	Margin	SPIV
<b>Demo Branch 1</b>										
<b>Duncan Shaw</b>										
<b>Retail</b>										
<b>Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield</b>	INV11142	2402/2026	£ 0.00	£ 149.17	£ 0.00	£ 0.00	£ 149.17	£ 179.00	£ 149.17	£ 0.00
Blomberg LWA29461W 9kg 1400 Spin SpinServe Washing Machine - White	Stock No: 5121100012									Serial Number: <NONE ENTERED>
DG WASHING MACHINE-36-499	Parts: 60	Labour: 60								
<b>Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield</b>	INV11177	2502/2026	£ 0.00	-£3.74	£ 0.00	£ 4.49	£ 0.75	£ 0.00	-£3.74	£ 0.00
Indesit D2IHL326UK Full Size Integrated Dishwasher - White- 14 Place Settings	Stock No: 5155100041									Serial Number: <NONE ENTERED>
Domestic and General DG-DW-12-5	Parts: 1	Labour: 1								
<b>Duncan Shaw</b>	Quantity: 2.00		£ 0.00	£ 145.43	£ 0.00	£ 4.49	£ 149.92	£ 179.00	£ 145.43	£ 0.00
<b>Demo Branch 1</b>	Quantity: 2.00		£ 0.00	£ 145.43	£ 0.00	£ 4.49	£ 149.92	£ 179.00	£ 145.43	£ 0.00
<b>Grand Total:</b>	Quantity: 2.00		£ 0.00	£ 145.43	£ 0.00	£ 4.49	£ 149.92	£ 179.00	£ 145.43	£ 0.00

# Selling Domestic and General Warranties

Domestic and General Warranty Sales

## **Procedure Guide for NCompass**

**NCompass Versions 11.14.0 (and Above)**

**This guide covers your core system please keep it to hand for reference.**

**Rev. 1.0**

**Authors DP**

**Need further help?**

Call Support on 0845 125 9193

You can also email [support@findesolutions.com](mailto:support@findesolutions.com)

Your Calculus Software Solutions support cover:

Monday – Friday 9am-5pm	<b>For the duration of your contract.</b>
Outside the above hours, including weekends	<b>£75 plus VAT per incident</b>

**For help using your system, please call 0845 125 9193**

**For out of hours Support 0845 833 9196**

**For sales enquiries such as till rolls or system upgrades, please call 0845 125 9192**

**For VeriFone queries, please call their Helpline on 08444 828222.**

[Overview](#)

[In Store Warranty Sales](#)

[Selling warranties with the products](#)

[Selling a warranty for a previously sold product](#)

[Promoted Warranties](#)

# Overview

NCompass Advanced Retail now supports direct integration for Domestic and General warranties, for both sale and submission.

Schemas include

In store term warranty

In store monthly warranty

Online term warranty

If you want to be able to sell online monthly warranty, this will require extensions and development to your website, currently we do not offer the facility to sell monthly warranties via your website

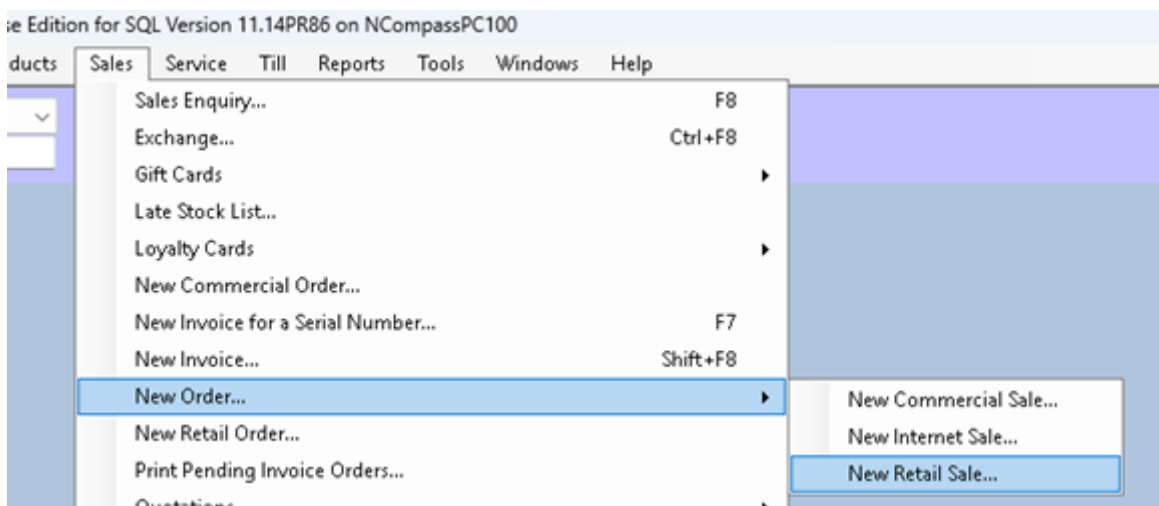
# In Store Warranty Sales

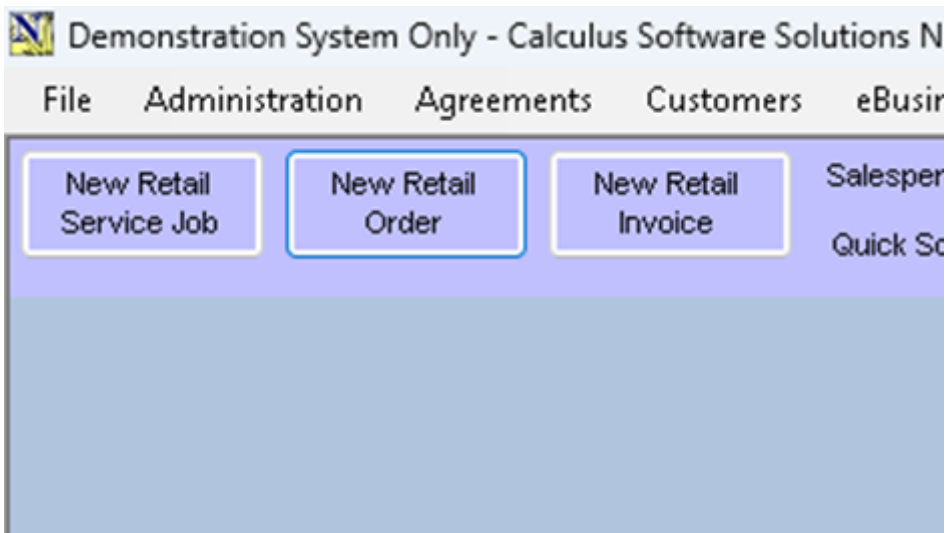
NCompass can 'Prompt' the salesperson to add the warranty to the sale each time an item is added to the sales order or invoice.

If you want to sell a warranty for a product that's already sold, this is also supported

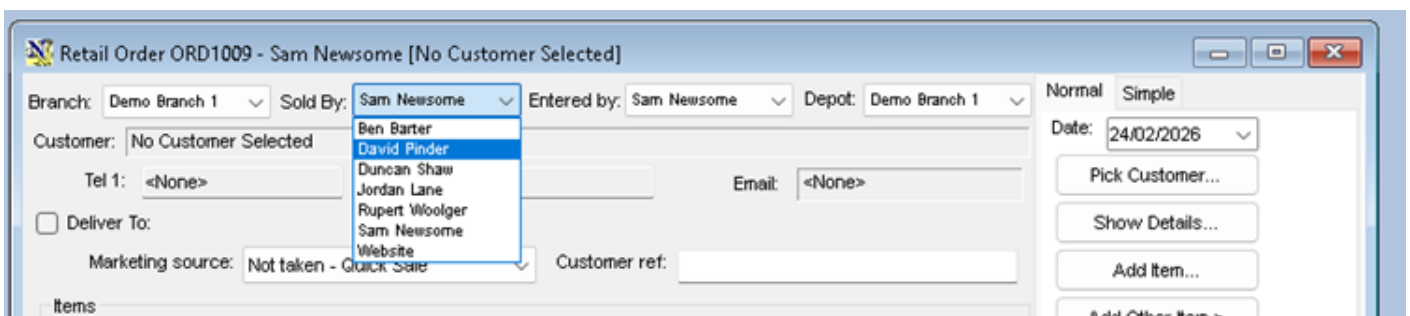
Selling warranties with the products

Start the sale process in the normal way usually this is via a sales order





Sign into the sales order window in the normal way



Then Select Pick Customer

Search for your customer

Customer Enquiry for Retail Order ORD1009 - Sam Newsome [Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD]

**Search Details**

Surname: pin Search

Forename: SmartMatch

Telephone:

Postcode: ng

Company / Address:

Email:

Account No:

Branch:   
 Category:

Date of Birth: To Over 18

Account/Cash Customers

CustomerID: NCCRM/ No Customer

Include Expired Entries

Enter the details to match - any left blank will be ignored.  
CustomerID is just the number portion, and must be exact;  
Address will find the entry anywhere in the address fields;  
Other items will only match items beginning with the data entered.

If you have a customer card, scan or swipe it to find that customer

**Current Matches (Exact)**

Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD

Details... Items... History... Select

Ledger... Agreements... Sales... Service Jobs...

New... Cancel

If your customer is already in NCompass, Highlight and click Select

If your customer is not found

Click 'New'

Mr Pin, NG - New Customer

CustomerID: <No ID Available> Hot-links Tools

Customer Details

	Title	Initials	Forename	Surname
Name:	Mr			Pin

Company/  
Address:

County: Postcode: NG !

Country: [Not set]

Summary: Mr Pin, NG

Telephone: Two:

Mobile No: 07999895631 31 Fax:

Main Email: PINNNNN@test.com

Alt Email:

Website: Expired

Web Login... Show Map... Send Text...

Save Cancel Attachments... Extra >

Standardise Case  
 Show Expired

Fill in the customer details and then click Save

**Note:** its important you get full customer details, full title, initial, Surname, correct address, postcode email and telephone numbers

Click 'Save'

Now Add your product to the sales

Click 'Add Item'

Product Enquiry for Retail Order

Search Details

Manufacturer:  Search

Model/Part No:  Advanced

Stock/Serial No:

Quick Search:

Retail Price from:  to

Supplier:

Updated After:  23/02/2026 Before:  24/01/2026

Channel

Product Grade

New Stock  PO for Stock Only

S/H Stock Only  Include Expired Products

Barcode/Shortcode:  Scan

Fill in any combination of the above boxes, or scan a bar-code.  
Use a \* to match zero or more characters.  
Use a ? to match exactly one character.  
You only need complete the first part of the manufacturer or model

Product	Price	B/Free	C/Free	C/BO	C
Blomberg LWA29461W 9kg 1400 Spin SpinSave ...	429.99	8	8	0	0

Branch: Demo Branch 1 - available stock

Rental Price: No rate set

Retail Prices:  ex VAT: 358.33

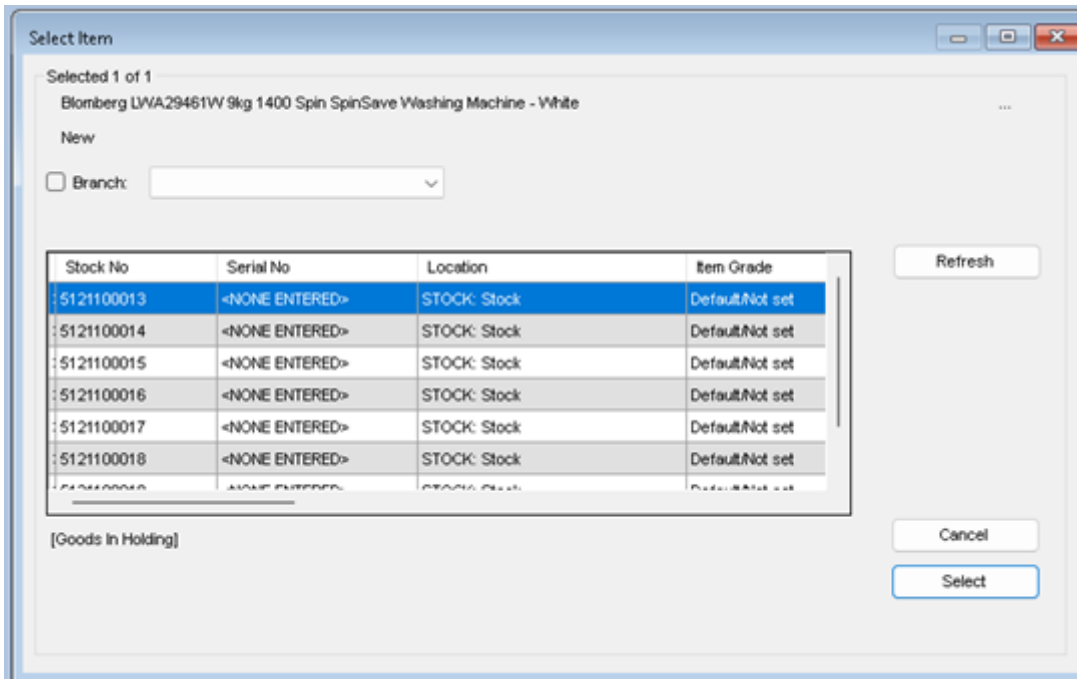
More > Variant Matrix... Link EPI+ Product(s)...

Select Stock... Product Info...

Create Special Order...

Cancel

Search for your item the click' Select '



Depending on your system settings, you may or may not be required to pick a stock number, if required pick the first available stock number

Highlight and Click 'Select'

You will then be presented with the price confirmation screen

Item Price

Item Quantity

Quantity required:

Allocate stock from:

Stock Number:

Price per item

Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White

Our List Price:

Discount %:  Discount Inc VAT:  ...

Unit Selling Price Ex VAT:

Unit Selling Price Inc VAT:

New: Default/Not set

This is an Agency product for Euronics Agency

If you're changing the price, you must do it before proceeding, as the next step will check the warranty category and retail price

Click 'Confirm'

**If your system is set to not to prompt for warranties, you will be returned to your sales order, however it's our recommendation that 'Prompt for Warranty' is turned on for all product categories, and the next window that opens is a list of available warranty purchase options**

The Warranty window will do a live call to Domestic and Generals system to check the warranty rates and update if required, this should only take a few seconds and then you will be presented with the list

The screenshot shows a software window titled "Extended Warranty Options". It is divided into several sections:

- Item Details:** Product: Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing, Price: 199.99, Stock No: 5121100013, Manufacturer's Parts: 36, Manufacturer's Labour: 36, Serial No: <NONE ENTERED>, Listed Warranty Scheme: WASHING MACHINE-36-249.
- Extended Warranty:** Scheme: WASHING MACHINE-36-249 (dropdown),  Show Expired, Max days for scheme: 30, DOP: 24/02/2026.
- Table of Options:** A table with columns: Labour (months), Parts (months), Price, and Availability. The first row is selected with a radio button.
- Purchase Details:** List Price: 143.00, Price includes accidental damage @ £0.00, Voucher Code: (empty field), Price ex VAT: 119.17, Price Inc VAT: 143.00. Buttons for "Cancel - No Warranty Required" and "Confirm Warranty Purchase" are present.

	Labour (months)	Parts (months)	Price	Availability
<input checked="" type="radio"/> 5 years:	60	60	143.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	
<input type="radio"/>	0	0	0.00	

Durations are the total cover, including existing manufacturer warranty

There may be more than one warranty purchase option available

This will show both term warranty.

36-month, 60-month, and the term includes the manufacturers original warranty

And monthly warranties, where the term will be set to 1 month and the price shown is the monthly price

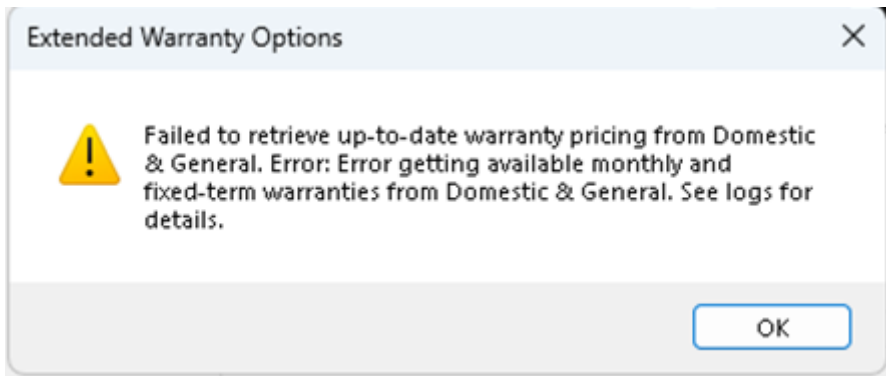
Select the desired warranty option and the price will update, not you should not try and change the warranty price, if you do the warranty submission may be rejected

Click 'Confirm Warranty Purchase' to continue with the sale and include the selected warranty

Or

Click 'Cancel – No Warranty required'

Note: if for any reason there is no access to Domestic and General's systems the rate will not be able to be confirmed, and you will not be able to sell the warranty



**If this happens, check your internet access and the service status with Domestic and General**

You can always return to the sales order later to add the warranty to the sales order.

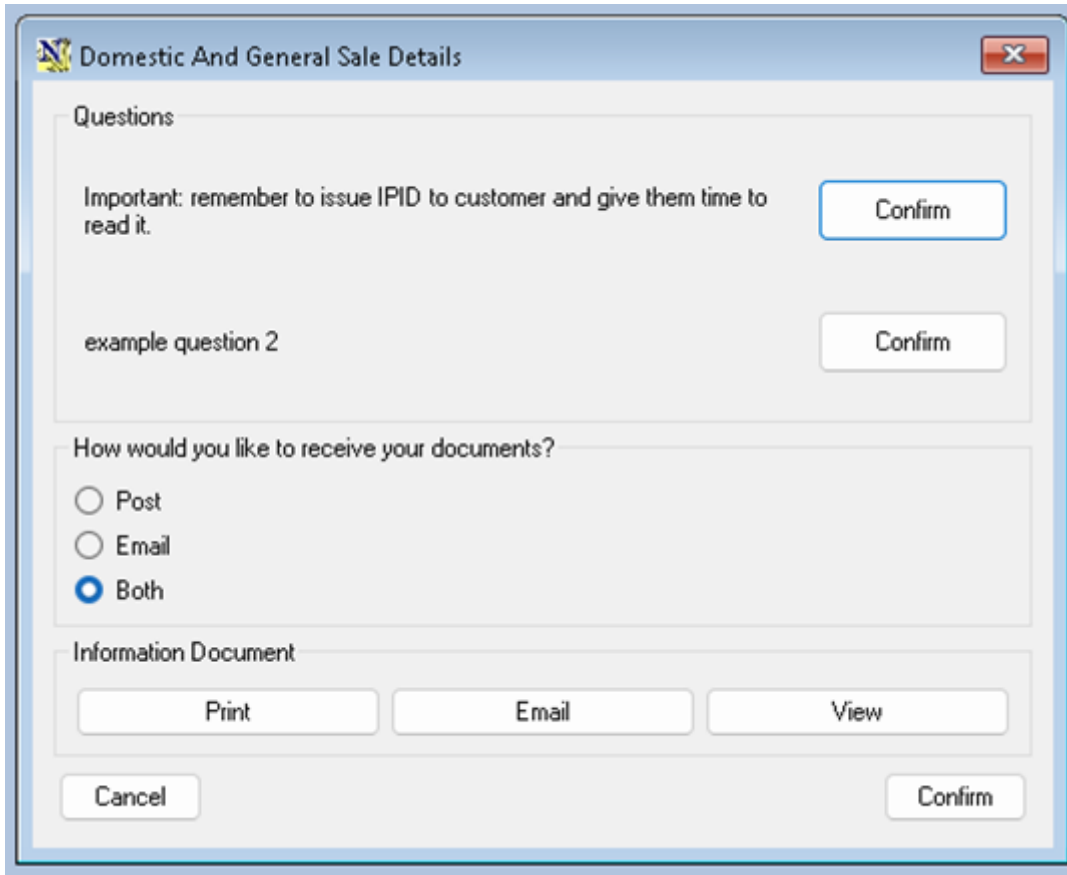
### **Complete the IPID requirements**

**IDIP = Insurance Product Information Document**

The PDF is stored the normal reports folder, and can be printed emailed or viewed directly from NCompass

This document can be different based on the warranty type, Monthly / Term

, It's a requirement that the customer gets a copy of the IPID and has a chance to read through the basic terms before accepting the warranty sale, Domestic and General may also require confirmation of any questions or statements before the warranty can be purchased, so the following window will open



The screenshot shows a software window titled "Domestic And General Sale Details" with a close button in the top right corner. The window contains three main sections:

- Questions:** A list of questions with "Confirm" buttons next to them. The first question is "Important: remember to issue IPID to customer and give them time to read it." The second is "example question 2".
- How would you like to receive your documents?:** A section with three radio button options: "Post", "Email", and "Both". The "Both" option is selected.
- Information Document:** A section with three buttons: "Print", "Email", and "View".

At the bottom of the window, there are two buttons: "Cancel" on the left and "Confirm" on the right.

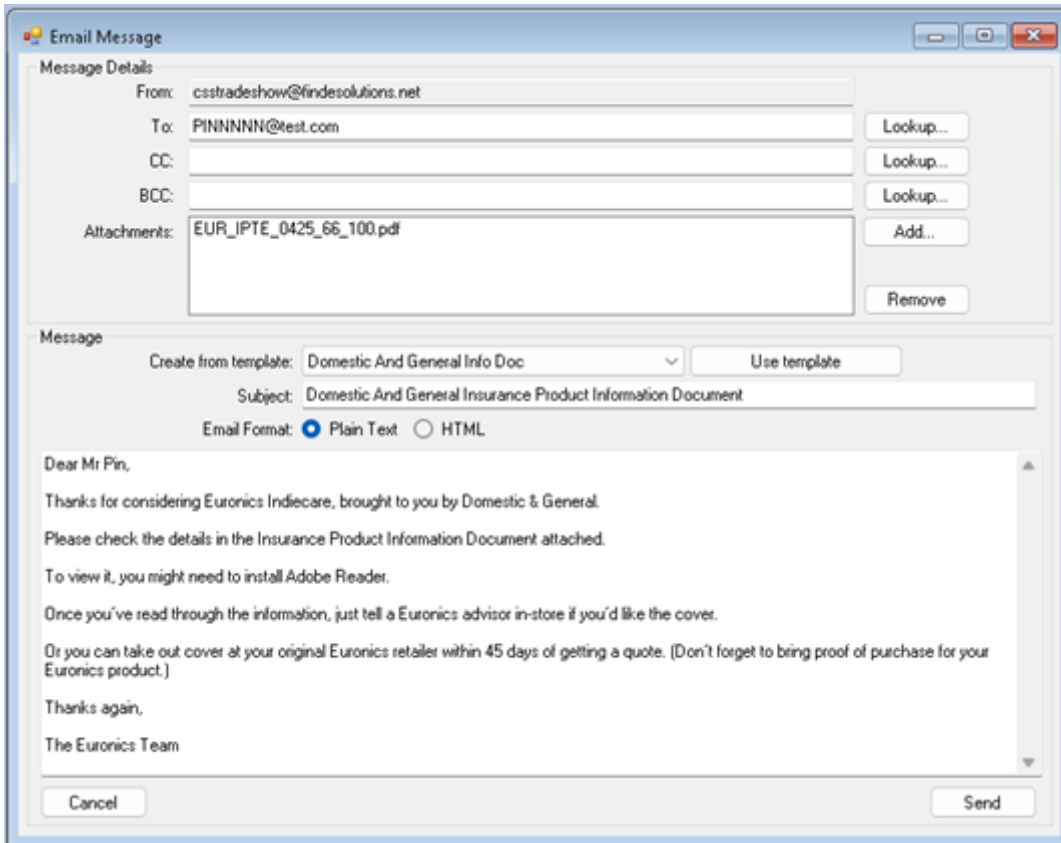
Confirm Any Questions

Select the warranty Document delivery method (this defaults to both)

If there are any questions or statements that require confirmation, they must be read out to the customer and then confirmed, normally for Domestic and General the only question will be to confirm that the customer has received read the IPID

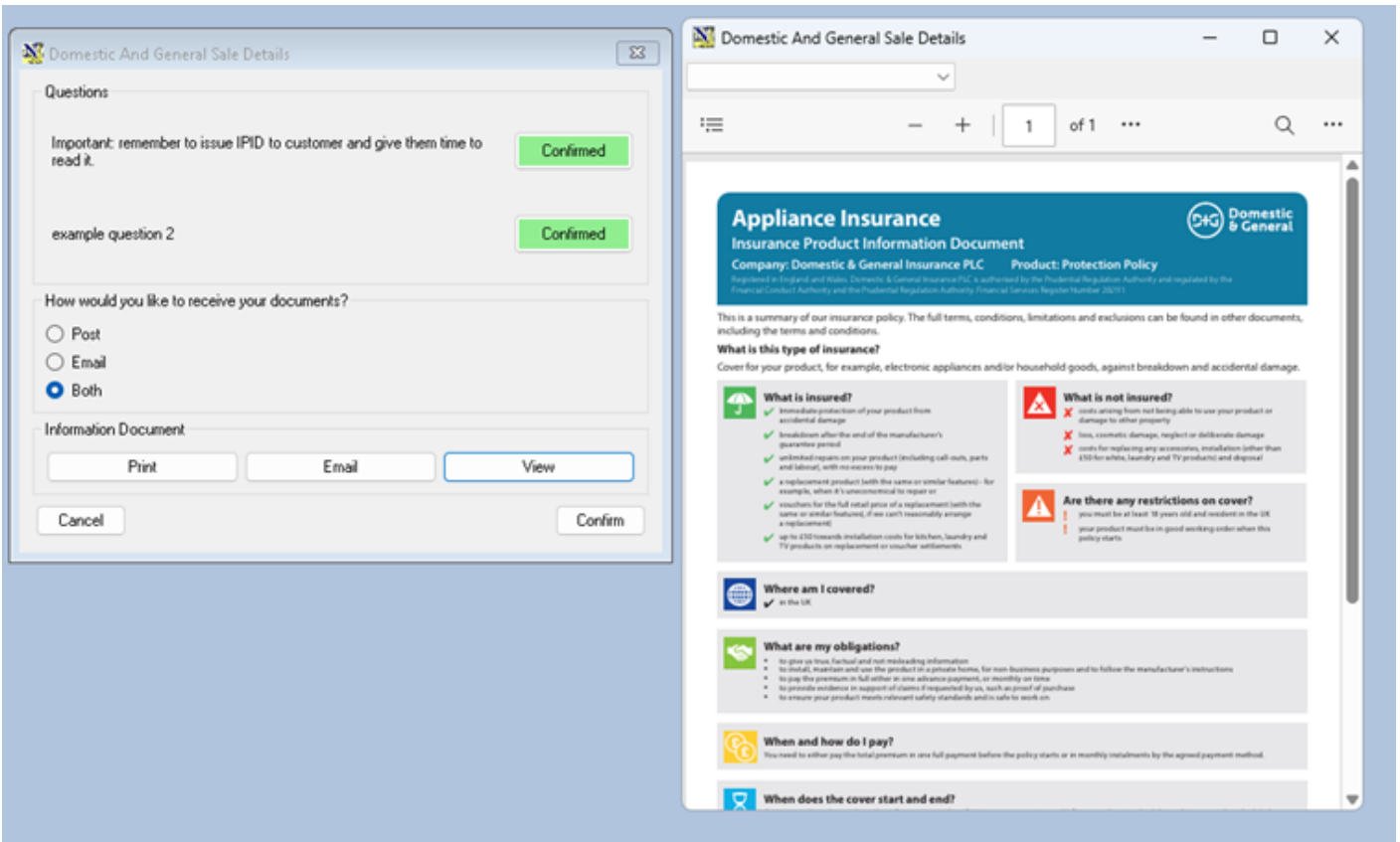
Print Will send the correct IPID PDF to the default A4 Printer

Email will open up the NCompass Email client with the customers email address and a email template with the correctly worded text, and the PDF attached



Click 'Send'

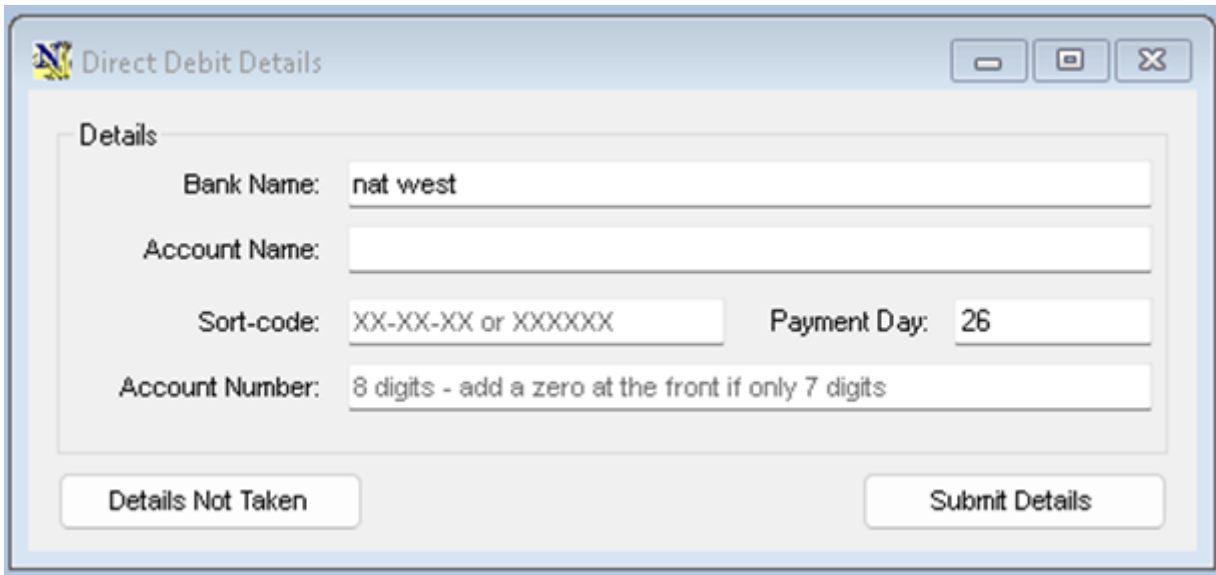
View will open the PDF in a mini-Browser



Once the customer has received / viewed the IPID you can Continue

Click 'Confirm'

If a monthly warranty has been selected, you will be prompted to collect the customers Direct Debit details



The image shows a software window titled "Direct Debit Details". It contains a form with the following fields and controls:

- Bank Name:** nat west
- Account Name:** (empty)
- Sort-code:** XX-XX-XX or XXXXXX
- Payment Day:** 26
- Account Number:** 8 digits - add a zero at the front if only 7 digits

At the bottom of the form are two buttons: "Details Not Taken" and "Submit Details".

Enter the customer bank details

The payment day defaults to the current day, the customer can have the direct debit taken on any day from the 1<sup>st</sup> to the 28<sup>th</sup>

You cannot submit monthly warranties without bank details, if click 'details not taken', you will be prompted again when confirming the sale

Retail Order ORD1009 - Sam Newsome [Mr Pin, NG]

Branch: Demo Branch 1 Sold By: Sam Newsome Entered by: Sam Newsome Depot: Demo Branch 1

Customer: Mr Pin, NG

Tel 1: <None> Mobile: 0799989563131 Email: PINNNNN@test.com

Deliver To: Marketing source: Customer ref:

Items - 1 item total over 2 lines

Product	Stock No	Serial No	Discount Group	Selling Price	Available From
Blomberg LWA29461W 9kg 1400 S...	5121100013	<NONE ENTER...	B - LIST PRICE I...	199.99	24.02/2026
Extended Warranty For Blomberg L...	5121100013	Parts: 60 Labo...		143.00	

Quantity: 1   1 item, 2 lines **Total: £342.99**

No status; Assigned to Duncan Shaw

Payment: 342.99

Defer Completion **Balance: -£342.99**

ORD1009  Gift Receipt

Normal Simple

Date: 24.02/2026

Back at the sales order screen, you can now continue to add more products, if additional products also have a tagged warranty, the same process will be available for each product line

When the sale is complete

Click 'Confirm'

Complete Sale - ORD1009

Are you sure you wish to complete this Sale?

Delivery

Order Balance: 0.00

All items taken now

All items being collected later

All items being delivered by courier

All items being delivered by in-house delivery

Leave the current delivery/collection arrangements as they are

Advanced - a mixture of the above or raise an additional delivery note

None - this will be arranged later

Surveys

There are no surveys to complete

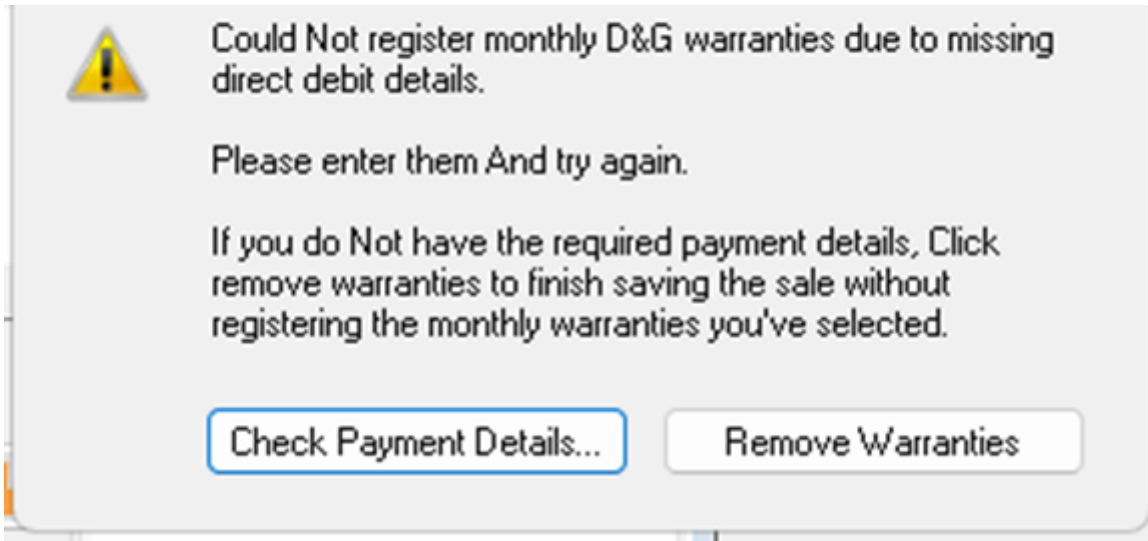
Receipt

Normal settings will be used to output a receipt

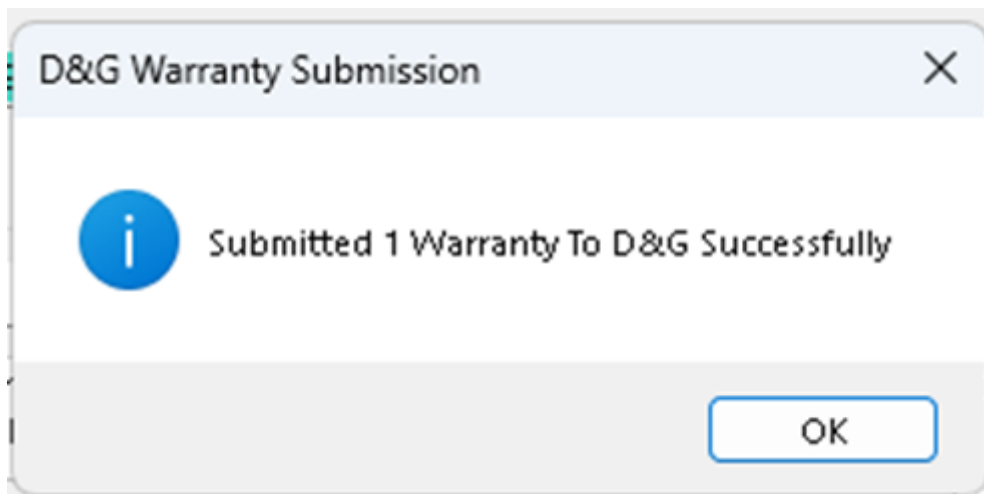
Select the item delivery / Shipping / Collection options required

Click 'Complete Sale'

If you have not taken the bank details and there is a monthly warranty present on the sale you get one final chance to enter them, monthly warranties can not be submitted without bank details



The Warranty Submission will now take place, there will be a short pause while NCompass connects to Domestic and Generals systems and submits the warranty, Once complete you will get a confirmation



If the Warranty Fails to submit you will be given a reason

The Warranty is automatically removed for the sales order and is replaced with a sundry line indicating the submission has been cancelled

Deliver To:

Marketing source:  Customer ref:

Items - 2 items total over 2 lines

Product	Stock No	Serial No	Discour
Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White [Dem...	5121100014	<NONE ENTER...	
D&G Warranty Submission Failed, Warranty Not Processed			

Selling a warranty for a previously sold product

Start a new sales order

Add the customer on to the sales order

Click the Warranty button and select the option 'For another item'

Retail Order ORD1005 - Duncan Shaw [Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD]

Branch:  Sold By:  Entered by:  Depot:

Customer:

Tel 1:  Mobile:  Email:

Deliver To:

Marketing source:  Customer ref:

Items

Product	Stock No	Serial No	Discount Group	Selling Price

Quantity:

No status; Assigned to Duncan Shaw

0 items, 0 lines **Total: £0.00**

Normal Simple

Date:

This will bring up a list of the customers previous purchases

Customer Product List - Sold Items without Extended Warranty

Customer: Mr D Pinder, 11 Deepdale Park, Sutton-In-Ashfield, NG208AD Pick Customer... Show Details...

Sale/Agreement Number:   Include returned items

Product: <Click Pick Product, or scan a barcode now> Pick Product... Search

Include 'No Customer Selected' Show first: 200

Date	Type	Status	Reference	Salesperson	Price	Product	Manf	Manf	Extended Parts	Extended Labour	S
24/02/2026	Sale	Current	INV11172	Duncan S...	£429.00	Bosch PIE631BB5E 59 2cm Induction Hob - Black	24/02/2031	24/02/2031			51
24/02/2026	Sale	Current	INV11168	Duncan S...	£149.99	Bosch BCHF220GB Serie 2 2-in-1 Cordless Vacuum Cleaner - 44 Minutes ...	24/02/2028	24/02/2028			51
24/02/2026	Sale	Current	INV11167	Duncan S...	£339.73	Beko CEG7302B Bean To Cup Fully Automatic Espresso Machine - Black	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£366.91	Bosch WAN26282GB Capacity 8kg, 1400 rpm, SpeedPerfect, Active Wat...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£843.52	Bosch WAW26750GB Capacity 9kg, 1400 rpm, ActiveOxygen, Active Wat...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11167	Duncan S...	£416.42	Indesit EWDE861483W EWDE 861483 W UK 6kg Washer Dryer - White	24/02/2028	24/02/2028			51
24/02/2026	Sale	Current	INV11165	Duncan S...	£399.00	Bosch WAN26250GB Capacity 8kg, 1200 rpm, VarioPerfect, EcoSilence D...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11165	Duncan S...	£759.00	Bosch WTW67561GB Capacity 9kg, Heat Pump, SelfCleaning Condenser, ...	24/02/2027	24/02/2027			11
24/02/2026	Sale	Current	INV11163	Duncan S...	£269.00	Beko BMN3WT3821W 8kg 1200 Spin RecycledTub Washing Machine - W...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11158	Duncan S...	£269.00	Beko BMN3WT3821W 8kg 1200 Spin RecycledTub Washing Machine - W...	24/02/2027	24/02/2027			51
24/02/2026	Sale	Current	INV11153	Duncan S...	£429.99	Blomberg LWA29461W 9kg 1400 Spin SpinSave Washing Machine - White	24/02/2029	24/02/2029			51
24/02/2026	Sale	Current	INV11150	Duncan S...	£429.00	Bosch PIE631BB5E 59 2cm Induction Hob - Black	24/02/2031	24/02/2031			51

The list shows all stock controlled items the selected customer has purchased or rented. If Status is Expired, the item has been returned.

Barcode  Scan Select Item History... Close

Highlight the item and Click Select

Proceed with the warranty purchase as above

### Promoted Warranties

There is provision in the rates table / API call for promoted warranties, if a promoted warranty is available it will be shown in the warranty selection screen, the warranty name will be prefixed with [Promo]

The availability field will show when the promotion is valid until and under the selection table the promotional test will be shown

Max days for scheme: 30

DOP: 25/02/2026

	<b>Labour</b> (months)	<b>Parts</b> (months)	<b>Price</b>	<b>Availability</b>
<input checked="" type="radio"/> [PROMO] 2 years:	24	24	216.90	Available until 10/05/2026
<input type="radio"/> 3 years:	36	36	275.40	
<input type="radio"/> 4 years:	48	48	312.30	
<input type="radio"/> 5 years:	60	60	349.20	
<input type="radio"/>	0	0	0.00	

Durations are the total cover, including existing manufacturer warranty

**20% warrnty purchase discount**

Purchase Details

List Price: 216.90

Cancel - No Warranty Required