

Onboarding Procedure

Onboarding

Domestic and General will require confirmation that the retailer's system is set up correctly, so this specific onboarding procedure must be followed

- Dealer Contacts D&G and Signs up
- Dealer Contacts our admin team and signs up, Admin Adds SJ and assigns it to support
- Support do initial set up, enter sandbox creds, download rates and categories,
- Support contacts retailer and takes them through adding categories and mapping manufacturers, instructs retailer to come back to them when this is done, parks the SJ
- When the retailer confirms the mapping are done, supports checks the data and sends a copy of the mappings to D&G, tests a warranty sale into sandbox, parks SJ
- When D &G confirm they are happy with the setup, Support update credentials, runs tagging, goes through a test warranty sale with the retailer and if all is ok, update the creds to live (production)
- Support close job, email D & G informing them that the retailer is live

First Step

D & G warranty is a chargeable module; Admin must be contacted first and the relevant paperwork completed !

Dealer Information

Check with the retailer

- Do they want to remove old warranty providers?
- Will D & G be the Primary Provider?
- Do you know the dealer ID (should already be in config as CIH dealer code)
- Do they use Accounts export? see the full customer guide for this

Please confirm with the retailer!

Credentials

Sandbox Test Environment

Use these credentials for testing

BaseAuthUrl

<https://ips-domgen-auth-prod-sbx.auth.eu-west-2.amazoncognito.com>

BaseApiUrl

<https://apis.sbx.domgen.io>

ClientId: 5dq7ok6pqg1jftdge58gbeb0ra

clientSecret:1g556ree8l2koeo3o4he98oiqfkk056e49tm30m2mprl7ps8lq64

Seller ID is Always 00322, note this is not the dealer number!

Group ID is Always 00148

Live Production Environment

DO NOT USE THESE FOR TESTING - they will generate a live warranty agreement, if you do so accidentally, you must contact D&G and request the policy is cancelled

BaseAuthUrl

<https://ips-domgen-auth-prod.auth.eu-west-2.amazoncognito.com>

BaseApiUrl:

<https://apis.prod.domgen.io>

ClientID:

51vhsggqa0btrj609i6kjavldf

Secret:

90e08gcf7vdoc86kpirg73jjm92b5vrbcd07s5dacd94257fj84

Seller ID is Always 00322, note this is not the dealer number!

Group ID is Always 00148

Note the credentials are the same for all CIH dealers please ensure that the dealer code is correctly set!

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.

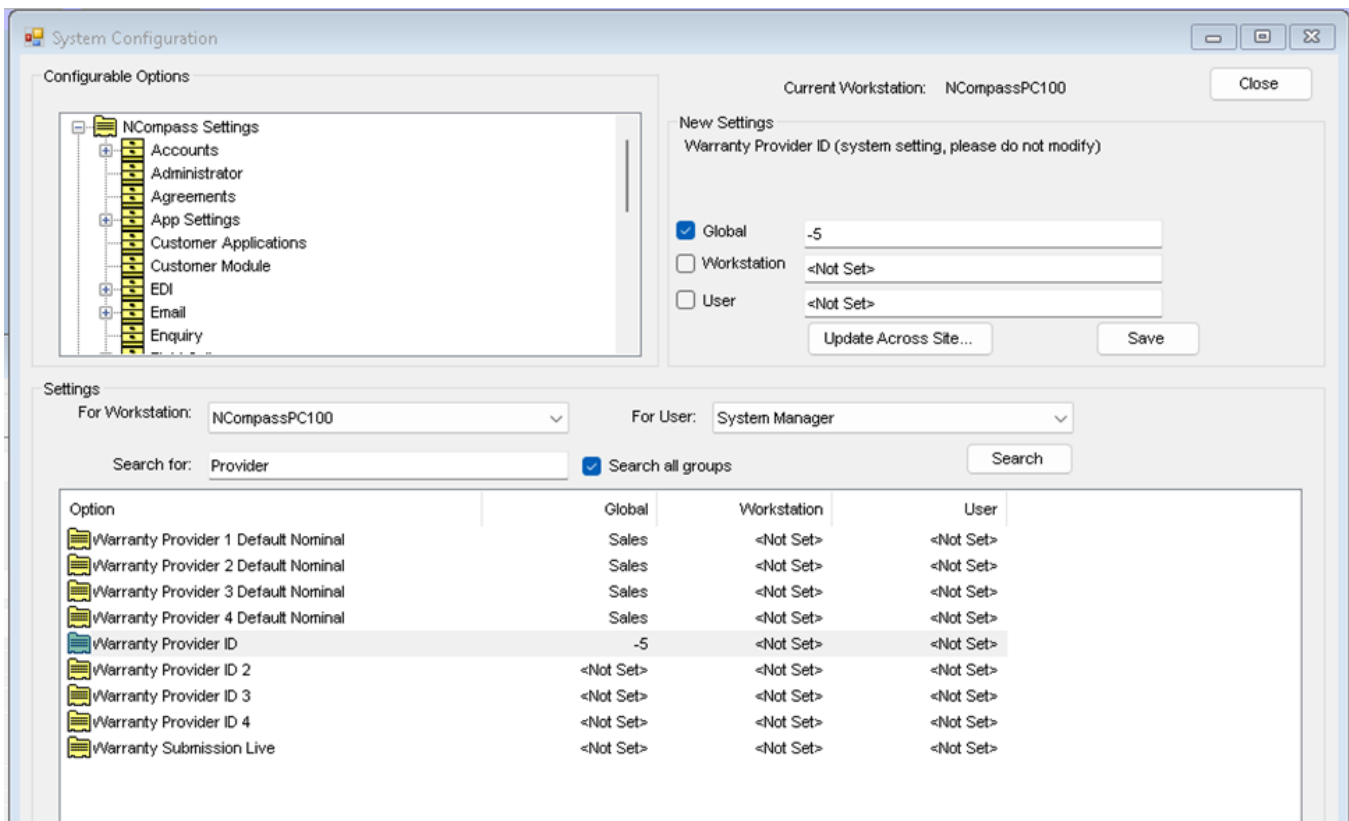
Enter 'provider' into the search box. 'search all groups' checkbox, hit search.

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.

Check with the retailer to see if they need other providers removing



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'

Ensure this is set to yes globally.

Setting up the warranty Provider

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 'Saves'

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,

Enter the Sandbox Credentials

Seller ID is Always 00322, note this is not the dealer number!

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The screenshot shows a software window titled "Extended Warranty Providers". It is divided into two main sections: "Providers" on the left and "Settings" on the right. The "Providers" section contains a list of providers, with "Domestic and General" highlighted. An "Edit >" button is next to the list. The "Settings" section has two tabs: "Details" (selected) and "Integration". The "Details" tab contains several input fields: "Seller ID" (00322), "Username" (5dq7ok6pqq1jftdge58gbeb0ra), "Password" (masked with asterisks), "API Endpoint" (https://apis.sbx.domgen.io), "Auth Endpoint" (https://ips-domgen-auth-prod-sbx.auth.eu-west-2.amazonaws.com), and "Group ID" (00148). At the bottom of the window are four buttons: "Close", "Show Expired" (with a checkbox), "Cancel", and "Save".

Setting the Dealer ID

The dealer id can be set globally or on a branch (workstation) 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 the CIH dealer code unless another has been provided by Domestic and General)
- Click Save

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

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.

Extended Warranty - Cloud Update

This process will update and add to your Warranty Codes using data held in the Calculus Software Solutions Cloud

Data will be sent to/from Calculus Software Solutions as part of this update, as covered by the terms and conditions of the Cloud Services extension to your Support Contract.

Extended Warranty Update

Provider: Domestic and General

☒ Use Retail Price from Cloud

☐ Automatically update codes and rates every day

Provider number: 1 (Primary provider)

☒ Download category list for this provider

☐ Attempt to update products with categories (may take a while)

Cancel

Save and Update

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'

Manufacturer and Category mapping

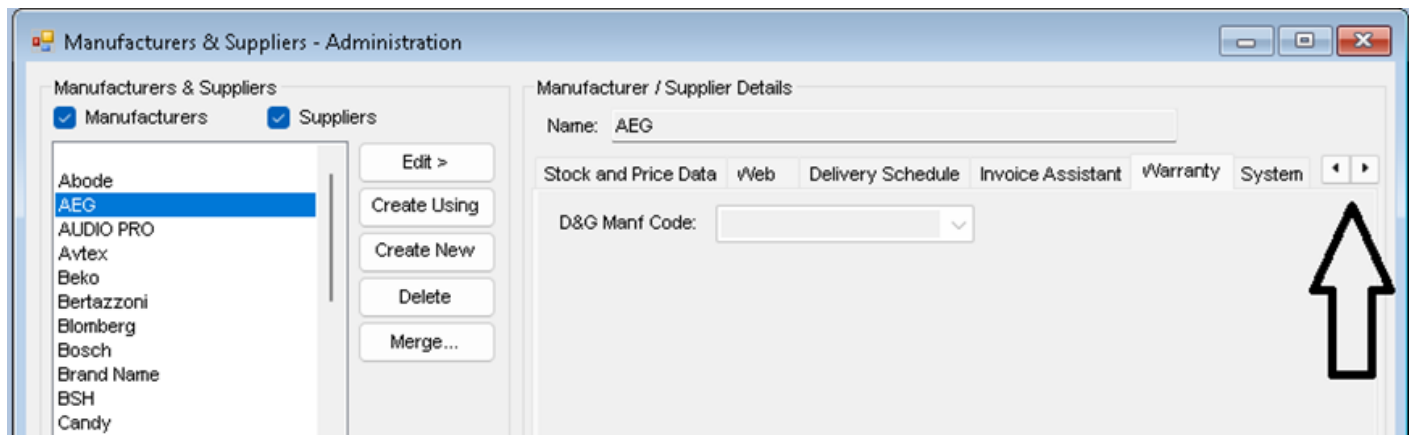
This Task can be handed back to the retailer as it could take some time, , there could be many manufacturers and departments that need mapping!

Show the retailer the following tasks and ask them to complete them, once completed continue with the rest of the setup

Mapping your Manufacturer

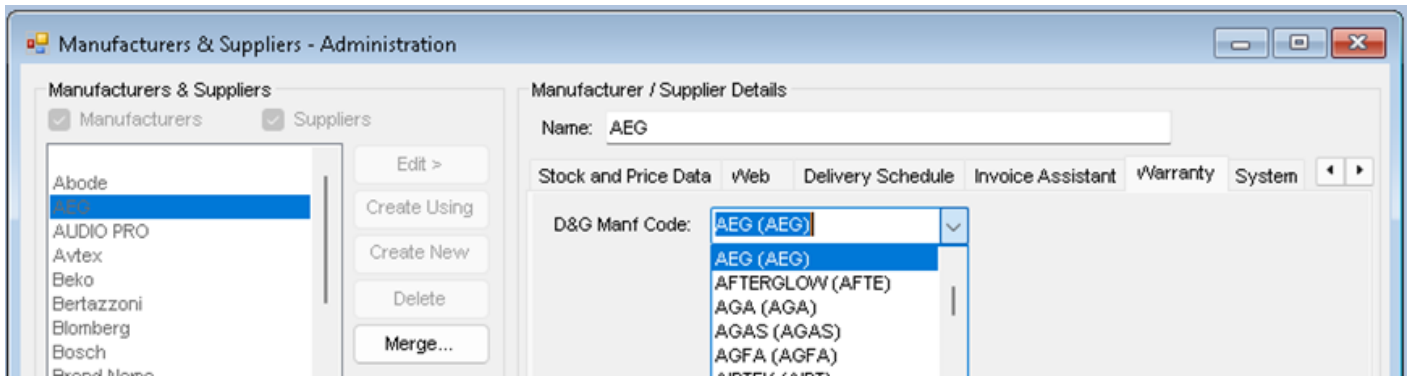
Go to: Administration > Manufacturers and Suppliers

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'

Repeat for all manufacturers you want to sell warranties for

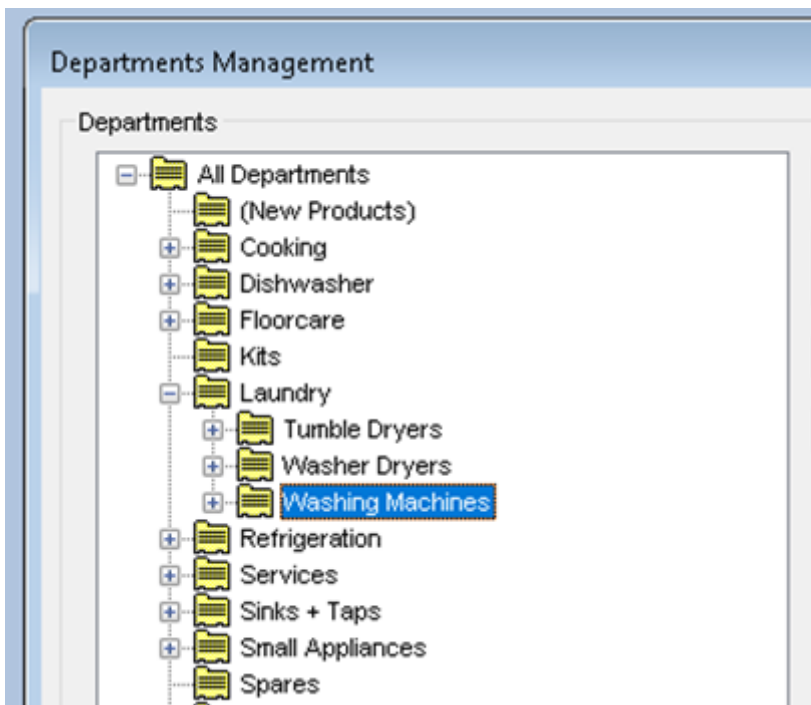
Manufacturer's part and labour periods

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

Setting your warranty category and action on departments level

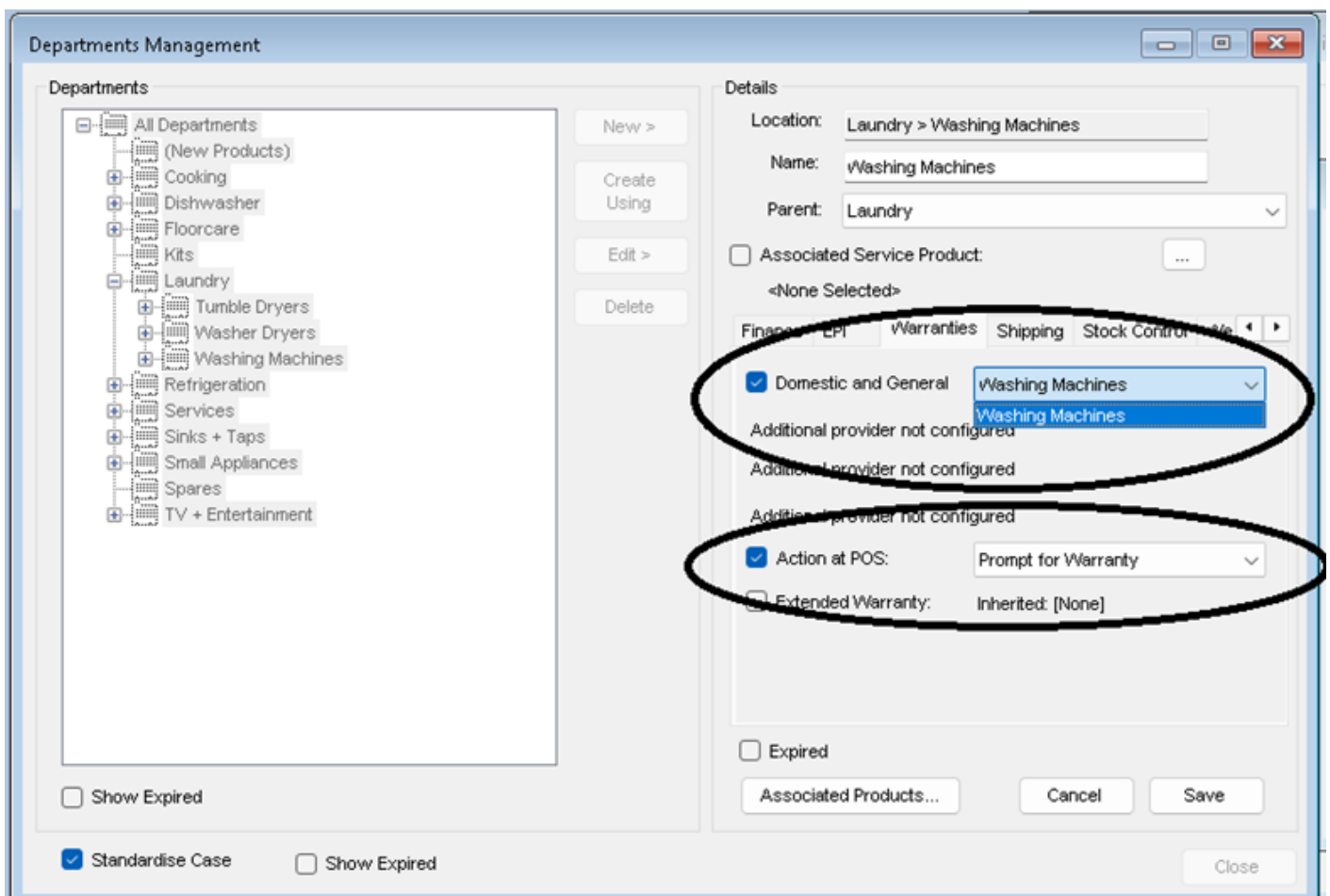
Go to: Administration > Departments Management

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.

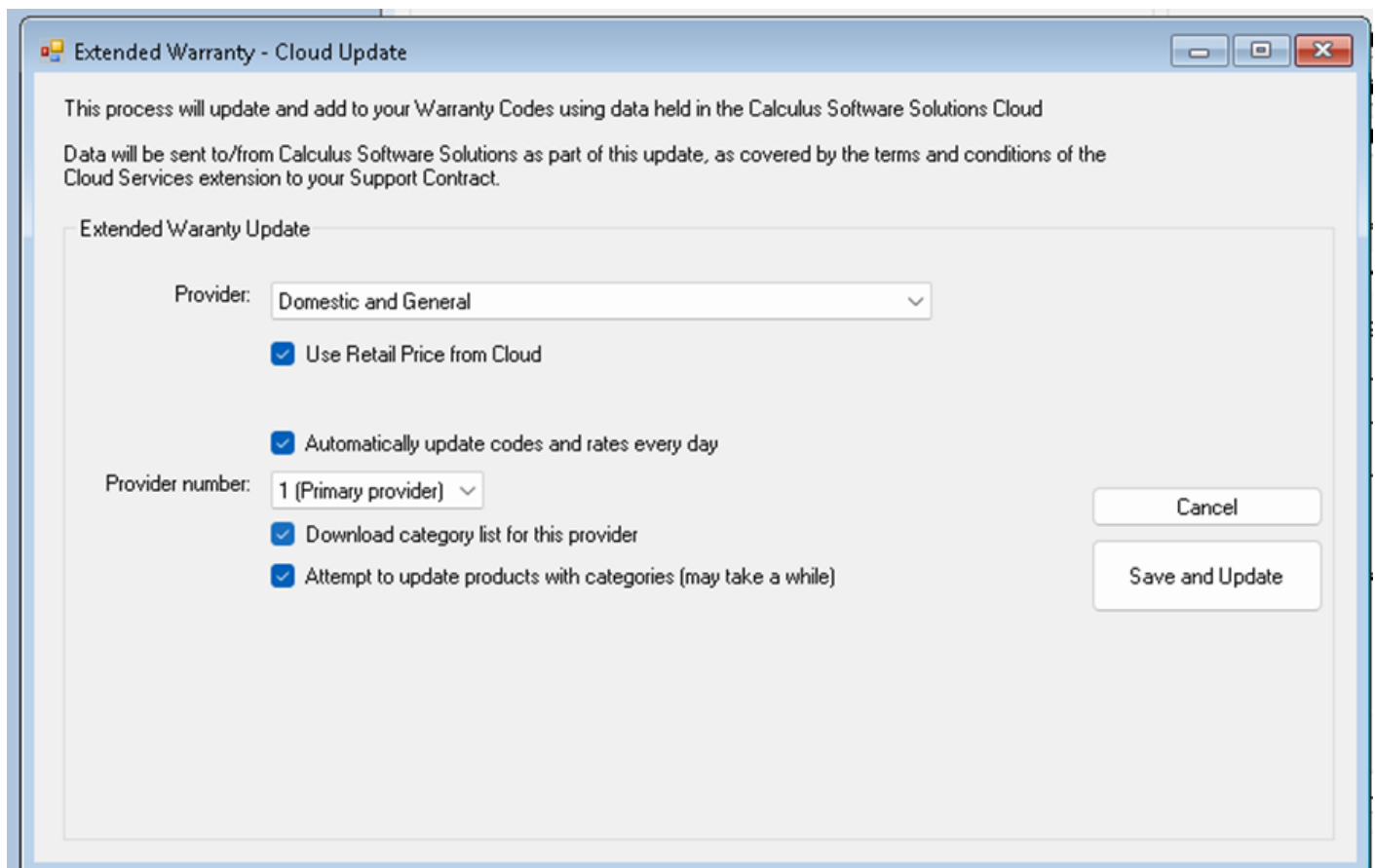
Tagging Products

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.



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Cancel

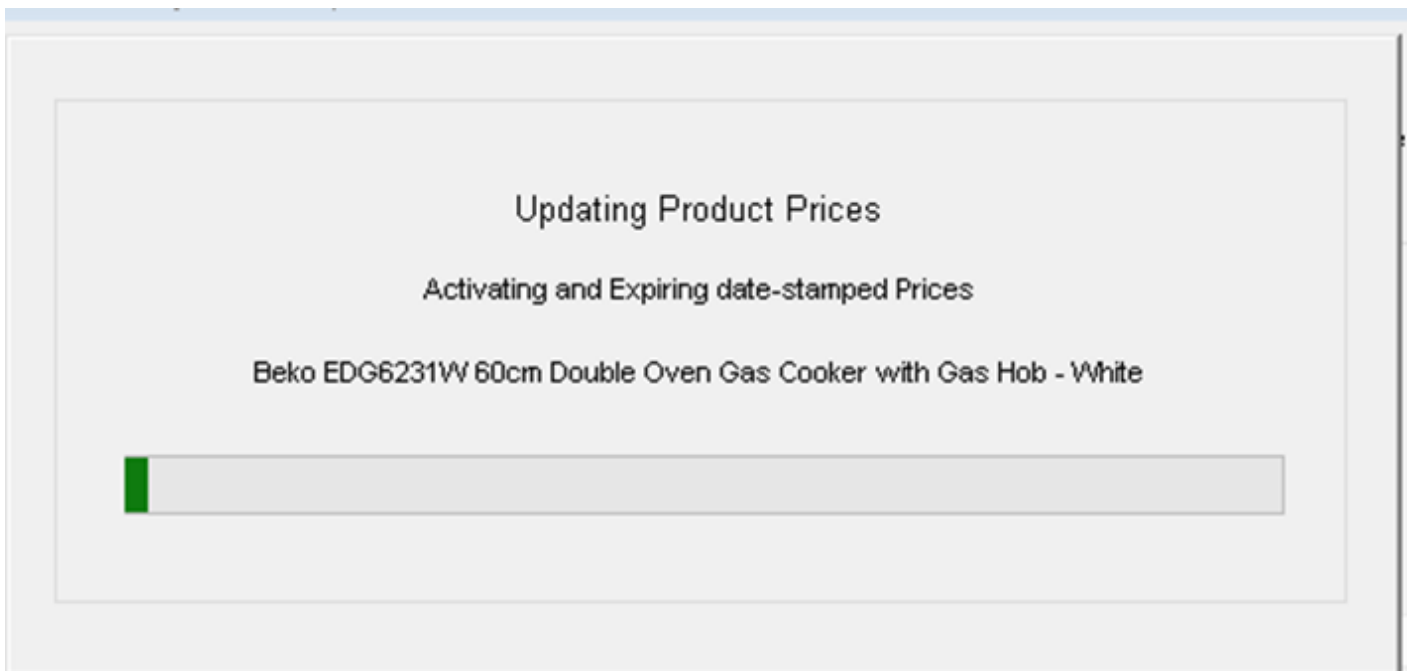
Save and Update

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

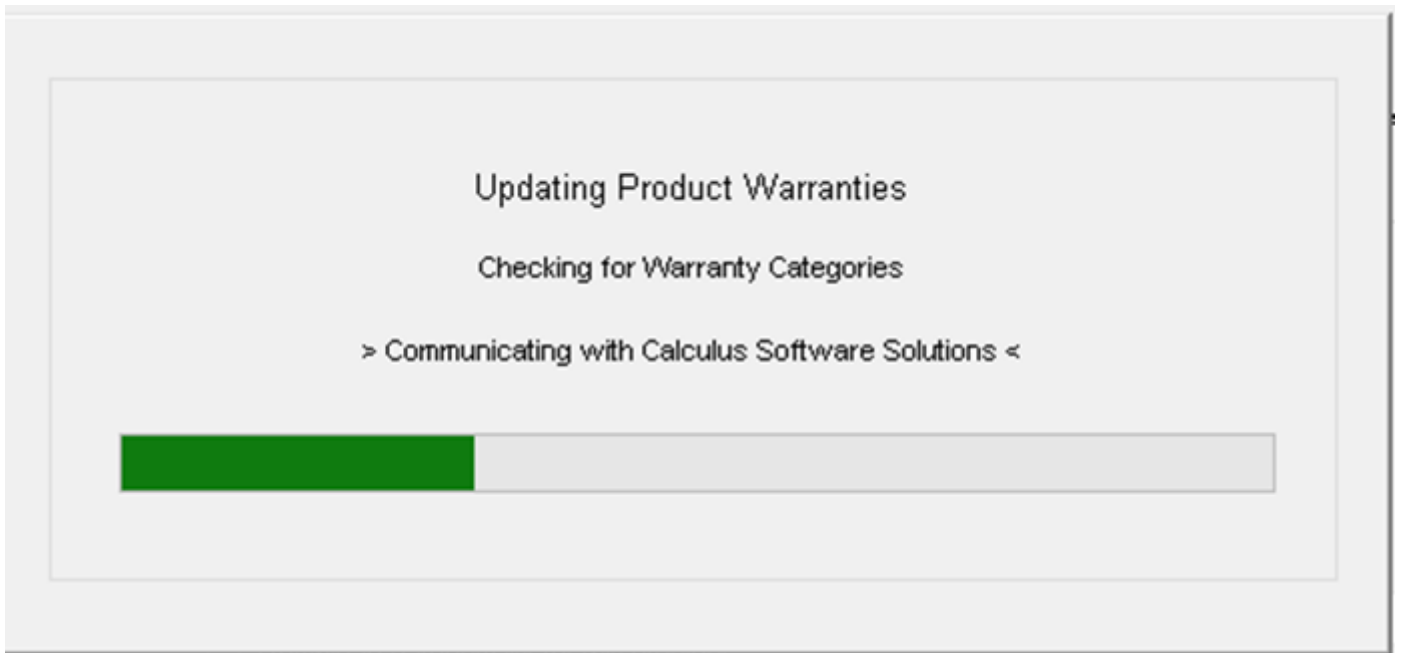
This process will take some time as it's going to look at all products on your system and tag them with the correct warranty based on category and price.

- Click 'Save and Update'

You will see progress boxes as the tagging takes place.



This may take several minutes to complete



Report Files

Make sure the 2 PDF files are present in the normal report's directory

EUR_IPTE_0425_66_100.pdf

And

EUR_IPMIP_0425_60_100.pdf

Final Configuration, Sign off and testing

Once the retailer has completed the mappings

Check the mappings, D&G will need to see that this is correct

Start a sales order, add an item that is tagged and when prompted for a warranty, check that the API call succeeds and you get a warranty rates back, if it error, check the setup, if all is good cancel the sales order

Add the following custom reports

D&G Manufactures Mappings

SQL

```
select Description, DGManfCode from ManfSupp where DGManfCode <>' ' and Expired=0 and Deleted=0
```

D&G Department - Category Mappings

SQL

SELECT

d.Description as 'Dealer Department' ,

wc.WarrantyCategoryDescription

FROM Departments d

LEFT JOIN WarrantyCategory wc

ON wc.Code = d.WarrantyCategoryCode_Local

WHERE d.WarrantyCategoryCode_Local < -1

AND wc.ProviderID = -5

D&G Rate Tabel Check

For the first few configurations D&G may ask you to check the rate table, the following SQL should suffice

SELECT

e.Company,

e.Description,

w.WarrantyCategoryDescription,

e.Type1Reference,

e.Type1Parts,

e.Type1Labour,

e.Type1rate,

e.Type2Reference,

e.Type2Parts,

e.Type2Labour,

e.Type2rate

FROM ExtendedWarrantyTemplate AS e

LEFT JOIN WarrantyCategory AS w

ON e.CategoryCode = w.Code

WHERE e.Company LIKE '%domestic%';

- Email the reports to D&G, you will now have to park the service job until we hear back
- Once confirmed by D&G you update the credential to the Live Production ones
- Re-start server GUI to allow the config to do the sweep to load

Pass the SJ back to Admin for invoicing

Domestic and General contact information

Contact email for our support team

admin and technical

admin use IndieCare@domesticandgeneral.com

for technical questions please use Service Desk

servicedesk@domesticandgeneral.com

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