

WebPresence

Managing your Calculus provided website.

- [Special Offer Text](#)
- [Adding Images to Sub-Category Pages in Magento](#)
- [Enhancing the Date Picker with AM/PM Delivery Slots](#)
- [Google](#)
 - [Google Promotions ID](#)
 - [Min/Max Energy Efficiency Class Google Feed Support](#)
- [Embedding videos on your product pages](#)
- [Magento Email Change Request](#)
- [Product Advisor](#)
- [Product Page Custom Tabs \(WIP\)](#)
- [Customer Account/Trade Management](#)
 - [Creating a Trade Account for a Customer](#)
 - [My Account / Statements](#)
- [Managing Search Terms & Redirects](#)
- [NCompass B2B \(accounts integration\)](#)
 - [Helpdesk Introduction](#)
 - [Helpdesk Promotional Information Block](#)
 - [Accessing the Helpdesk from NCompass Desktop](#)

Special Offer Text

TCL

LG 43UT80006LA.AEK 43" 4K LED Smart TV

Screen size43"

Display typeLED

Energy efficiency classG

Refresh rate60Hz Native

Display resolution4K (3,840 × 2,160)

+ Show more

Use Voucher Code 25MAY10P to Receive 10% off

Warranty 1 Year

£229.00

In Stock

Add to Basket

More Info

SAVE £30

TCL 43C655K 43" 4K QLED HDR Pro Android TV

Now £249.00
Was £279.00

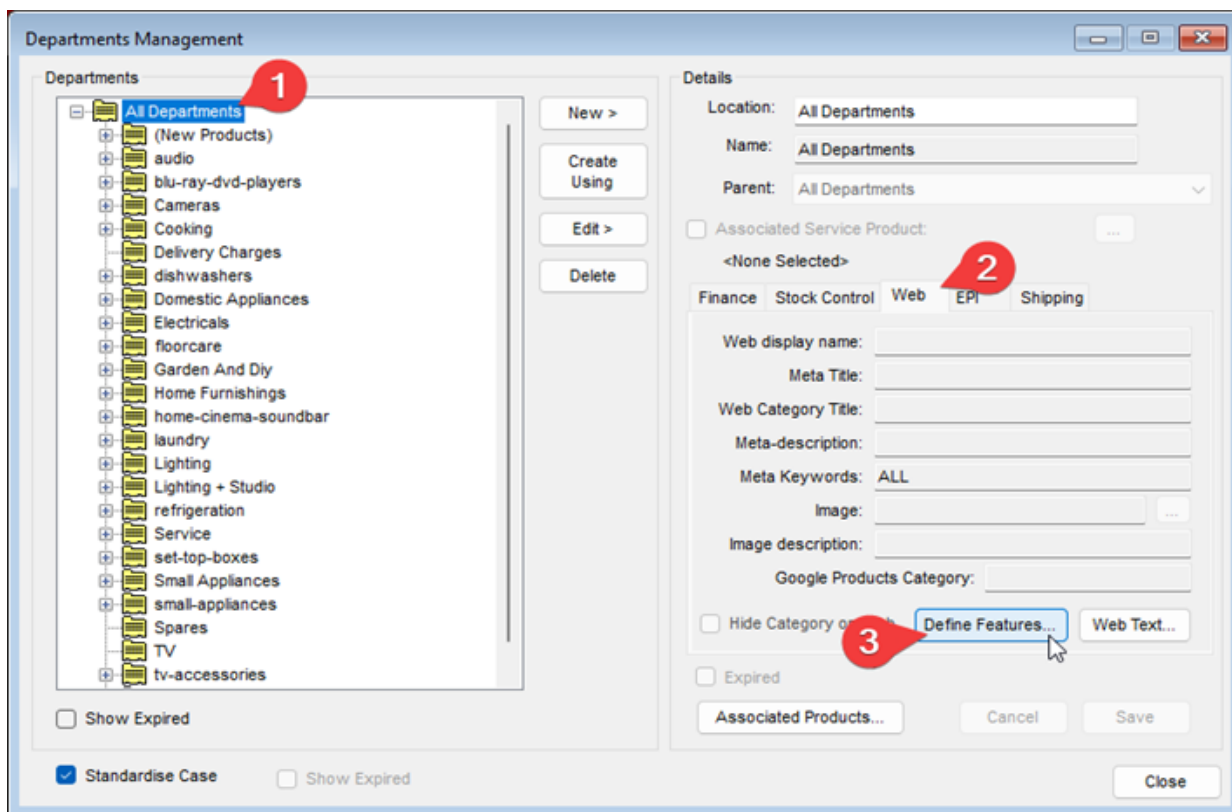
Home > TV & Projectors > Televisions > 4K Ultra HD TVs > LG 43UT80006LA.AEK 43" 4K LED Smart TV

strategy which can be applied on both your product and catalogue pages.

Configuring your feature

Open **NCompass** and navigate to **Administration > Department Management**

Select the top category known as **All Departments** > open the **Web** tab from the right hand side menu, and select **Define Features** in that section of the menu.



Now follow this step carefully. If you select **Create New** from the middle menu buttons, populate **exactly** as defined in the below steps 1 through 4,

Display Name: Special Offers Text 1

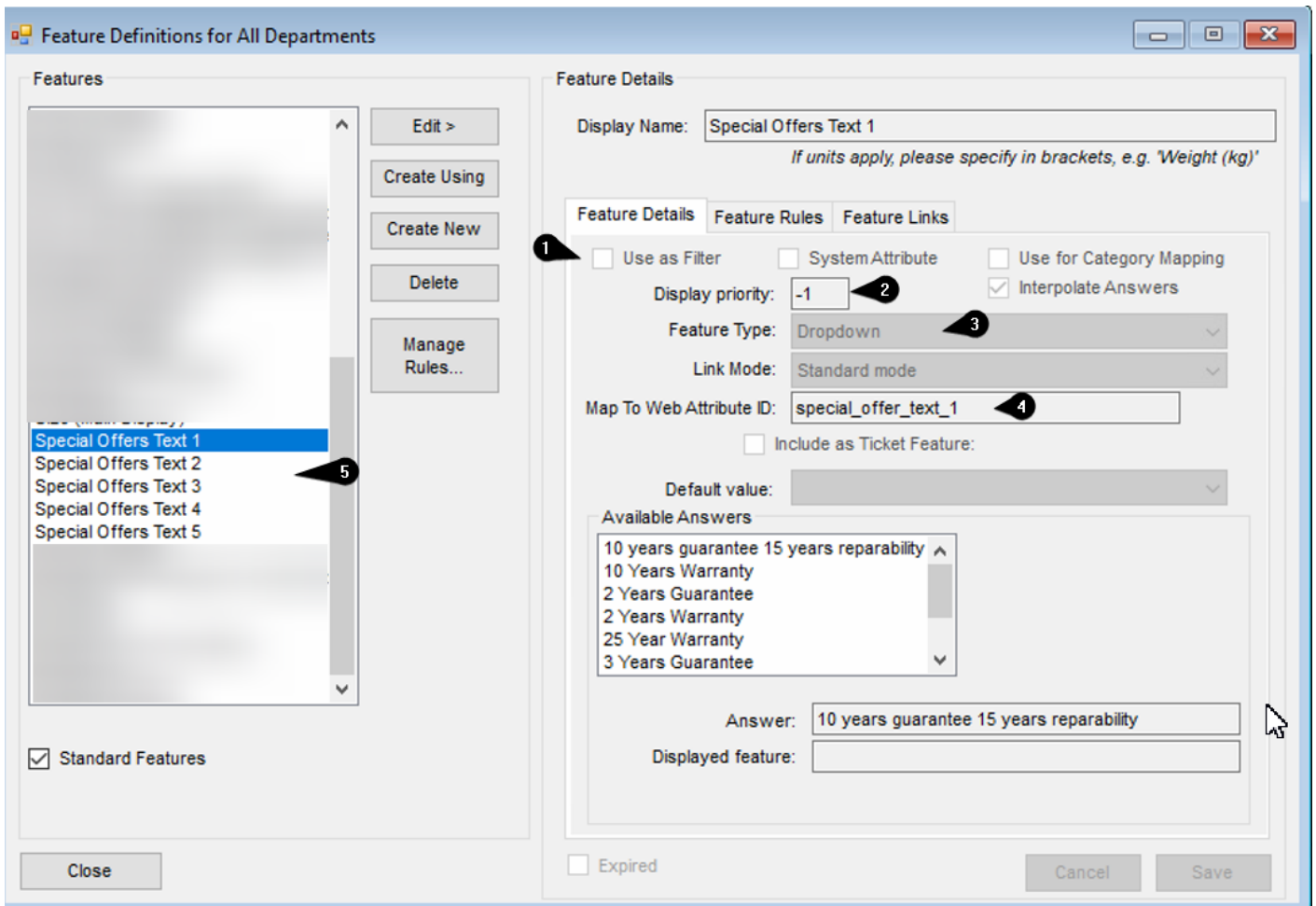
Use as filter: Unchecked

Feature Type: Dropdown

Display Priority: -1

Map To Web Attribute ID: special_offer_text_1

For marker number 5 in the below screenshot, you will notice that you can use this same feature up to 5 times, simply change the **Display Name** and **Map To Web Attribute IDs** number from **1**, to **2** all the way through to **5** for each feature will allow you to stack multiple



The Available answers will be what you would like to show on the website. if you'd like to know more about feature answers, please refer to the main webpresence documentation by [clicking here](#)

Applying Special Offer text to your products

Again within NCompass, open a designated product of your choice by navigating to **Products > Enquiry**, search for any product and open the **product info** for the item.

once here, navigate to the **Web** tab for the item, and select **configure features** from the menu.

Product Details

Standard Product

EPI+/PIM Not Linked Link ...

General Stock Control Financial Warranty Rental EPI Labels Ordering Web Associated Products Kits/Bundles Notes Quotations Chi

Web / Multi-Channel Settings... Change settings for display of this Product on your web-sites, Amazon and eBay

This product is enabled on the site using local web content

Product Features

Feature	Value	DefaultVal
350° oscillation	<empty>	
Accessories Included	<empty>	
Air Displacement	<empty>	
Air Flow	<empty>	
Air Treatment Category slider [Hide]	<empty>	
Battery Life (Up to)	<empty>	
Best Sellers	<empty>	

Configure Features Set and maintain the values shown for the features for this Product on your web-site

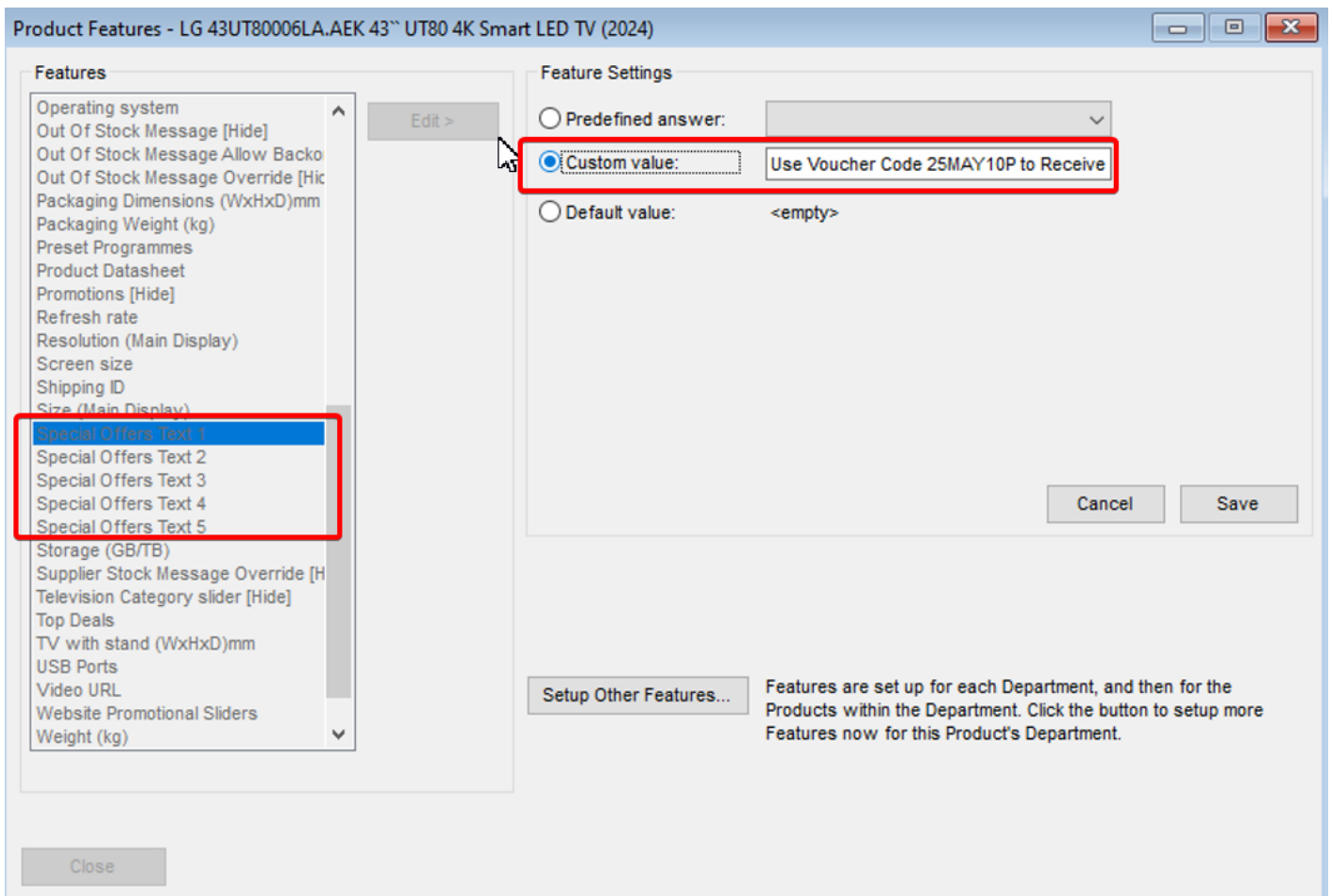
Web/Multi-Channel is a live, integrated web-site offering a display of products with live pricing, stock levels, and optional reserve & collect or e-commerce facilities.

<< Back Next >>

☒ Standardise Case Create Copy... Convert to Variant... Edit Close

From the list of features available to you, find your special offer text features from the left hand menu, and select **edit** from the middle section of this window. You may either use **Predefined answer**, or **custom value**, populate the value with what you wish to display in your catalogue/product pages. You can see i've set a custom value here which allows me to write anything i'd like in this field. be sure to click **save** found in the bottom right of the window to set the feature.

if you'd like to know how to use predefined answer, please refer to the webpresence management guide mentioned earlier in this guide.



These changes will now be sync to the website and you will see the special offer text now displays on the product listing, or catalogue page.

Changing the Appearance

Now we have the special offer text showing on the website, we can begin to adjust how the text is displayed. This is done in Magento Admin.

Navigate to Stores > Configuration and under the Calculus menu, select **Catalog Manager** and Under **Product Management** there will be a section called **Special Offers Block**

Show Special Offers Block in Product View [store view]	Yes	
Requires Product Attributes		
Show Special Offers Block in Catalog Listing [store view]	Yes	
Special Offers display position in Catalog Listing [store view]	Above Features	
Show Title [store view]	Yes	☒ Use system value
Display Style [store view]	Single Box	☐ Use system value
Block Title [store view]	Special Offers	☒ Use system value
Title Colour [store view]	#b41f21 	☒ Use system value
Show Title Icon [store view]	Yes	
Title Icon [store view]	Price Tags	☐ Use system value
Text Colour [store view]	#b41f21 	☒ Use system value
Show Border [store view]	Yes	☒ Use system value
Border Colour [store view]	#b41f21 	☒ Use system value
Border width [store view]	2	☒ Use system value
Border Radius [store view]	2	☒ Use system value
Show Icon for Items [store view]	Yes	
Item Icon [store view]	Price Tags	☒ Use system value
Show Icon for links [store view]	Yes	

Special Offers Block Configuration (Field-by-Field Explanation)

This configuration panel allows you to control the appearance and behaviour of the **Special Offers Block** on product and catalogue pages.

Visibility & Positioning

- **Show Special Offers Block in Product View**
Enables or disables the Special Offers block on individual product pages. Requires that the appropriate product attributes are set.
- **Show Special Offers Block in Catalogue Listing**
Controls whether the block appears on catalogue listing pages (e.g., category views).
- **Special Offers display position in Catalogue Listing**
Defines where the block appears relative to other product details. Options include "Above Features" or "Below Features".

Title and Display Style

- **Show Title**

Toggles the visibility of the Special Offers block title.

- **Display Style**

Choose how the offers are displayed:

- **Single Box:** All offers are grouped in one styled container.
- **Individual Boxes:** Each offer is displayed in a separate box with its own border.

- **Block Title**

Set the text that appears as the heading for the block, e.g., “Special Offers”.

- **Title Colour**

Choose the colour of the block title text.

- **Show Title Icon**

Enables an icon next to the block title.

- **Title Icon**

Select an icon to display beside the title. Options include **Price Tags**, **Thumbs Up**, **Tick**, **Recycle**, etc.

Offer Content Styling

- **Text Colour**

Defines the colour used for the offer text within the block.

- **Show Border**

Enables a border around each offer (or the entire block, depending on the Display Style).

- **Border Colour**

Sets the colour of the border.

- **Border Width**

Determines how thick the border line appears (in pixels).

- **Border Radius**

Controls the roundness of the corners on the offer box(es). Higher values result in more rounded corners.

Icons for Offers and Links

- **Show Icon for Items**

Displays an icon before each individual offer item (not just the title).

- **Item Icon**

Choose the icon used for each item (same list of options as the Title Icon field).

- **Show Icon for Links**

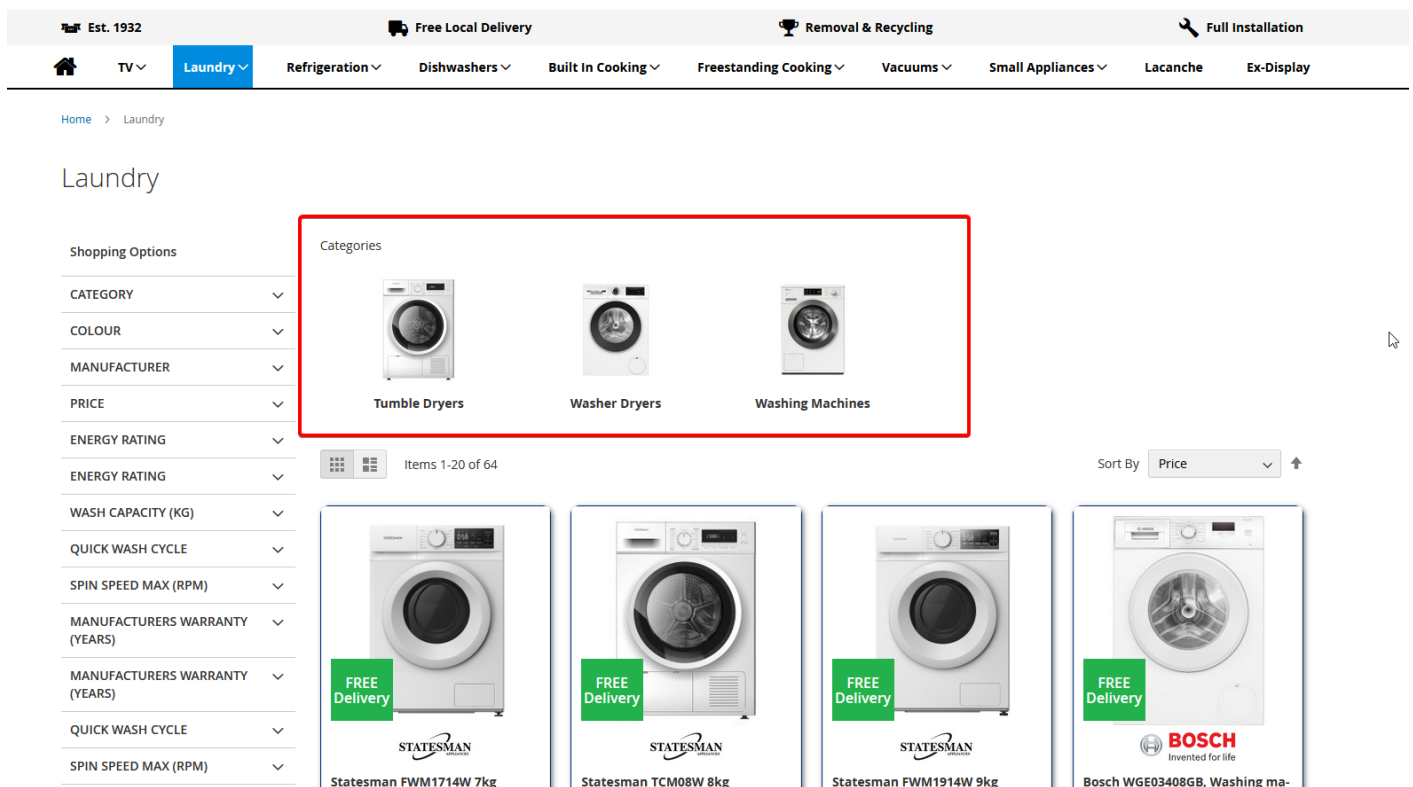
If links are included in your offer content, this option toggles whether an icon should appear next to those links.

After making changes, press **save config** in the top right of the magento dashboard,

A cache flush may be required before changes are reflected on the website. This can be done by navigating to **System > Cache Management** from the left hand menu

Adding Images to Sub-Category Pages in Magento

This guide explains how to add images to your sub-category pages, giving your customers a more visual and intuitive navigation experience. The process is straightforward and requires minimal effort to set up.



Step 1: Log in to Magento's Backend

1. Open your browser and go to your admin panel.
Example: `mywebsite.co.uk/cssadmin`
2. Enter your provided username and password.

Step 2: Navigate to Categories

1. In the left-hand menu, go to **Catalogue > Categories**.
2. Select the parent category you want to enhance (e.g., **Laundry**).

For example, if “Laundry” has child categories such as *Washing Machines*, *Washer Dryers*, and *Tumble Dryers*, you can assign images to each child category.

Step 3: Add an Image

1. With your chosen category selected, expand the **Content** section.
2. Locate the image box. You can either:
 - Click the box and upload an image from your local computer, or
 - Drag and drop the image file directly onto the box.

Image guidelines:

- Use square images for the best results.
- Recommended maximum size: **300 × 300 pixels**.
- Format: **JPG or PNG**.

The screenshot displays the Magento 2 dashboard interface. On the left is a vertical sidebar with navigation icons for Dashboard, Calculus, Sales, Catalog, Customers, Marketing, MageDelight, Content, ManageDev, Reports, Amasty, Stores, System, Find Partners & Extensions, and AITOC. The main content area is titled 'Dashboard' and includes a search bar, a 'Scope: All Store Views' dropdown, and a 'Reload Data' button. Below this is the 'Advanced Reporting' section with a 'Go to Advanced Reporting' button. The dashboard is divided into several sections: 'Lifetime Sales' showing £199.99, 'Average Order' showing £199.99, 'Last Orders' with a table of recent orders, 'Last Search Terms' with a table of search results, and a 'Bestsellers' section showing the top product, the Dyson V8NEW Cordless Stick Vacuum Cleaner.

Customer	Items	Total
test outlook	1	£0.00
test 1 test 1	1	£0.00
Charles Brittain	1	£0.00
Nick Cobb	1	£0.00
Nick Cobb	1	£0.00

Search Term	Results	Uses
sf6100kvs1	2	3
kad93	2	2
pizza oven	12	1
kgn34	2	3
ken33	2	19

Product	Price	Quantity
Dyson V8NEW Cordless Stick Vacuum Cleaner - 40 Minutes Run Time - Silver	£329.00	2

Step 4: Save Your Changes

1. Once the image has been added, click **Save** at the top right.

Step 5: Clear Magento's Cache

1. Go to **System > Cache Management**.
 2. Click **Flush Magento Cache**.
-

Step 6: View on the Frontend

After the cache is cleared, the images you've added will appear on the front end of your website, enhancing your category navigation.

Enhancing the Date Picker with AM/PM Delivery Slots

This enhancement adds **AM/PM delivery slots** to the Date Picker module.

Note: The Date Picker module is a chargeable feature and requires **NCompass Engineer Area Management** AND **WebPresence Delivery Datepicker Modules** to function.

If you do not currently offer delivery dates on your website but wish to start doing so, please contact the admin team by clicking the provided [button link](#).

Before You Begin

- If you do not have the Date Picker set up, please follow the setup documentation before continuing.
Reach out to support@findesolutions.com to obtain the most up-to-date setup guide.
- If you already have the Date Picker installed and are familiar with configuring shipping options in NCompass, you can proceed with the steps below.

Step 1: Navigate to Shipping Options

1. Open **NCompass**.
2. Go to **Field Calls > Shipping Options**.

You should already see existing services such as **AM** and **PM** delivery options (if previously set up).

Step 2: Create Additional AM/PM Services (if needed)

If you'd like to add new AM/PM delivery services:

1. Duplicate an existing service, such as **Next Day Delivery** or **Anytime**.
2. Rename the duplicated service to represent the new time slot (e.g., *Next Day AM* or *Next Day PM*).
3. Associate a new **delivery product** with each new shipping option you create.

Shipping Options Administration

Shipping Options

Group: [All]

Edit >

Create Using

New >

Delete

Carrier Small Item Expedited Delivery

Carrier Small Item Standard

Next Day Delivery

Next Day Delivery AM

Next Day Delivery PM

Special Order

Standard Anytime Delivery

Shipping Settings

Shipping Option Availability | Shipping Option Detail | Basket Rules

Control when this option should be available to select.

Description: Next Day Delivery AM

Group:

Web Description: Next Day Delivery AM

View Product...

Pick Product...

Delivery Product: Next Day Delivery

Cost: £20.00

☐ Show Expired ☒ Show Current ☐ Show Future

Start Date	End Date	Notes
19/04/2024	31/12/9998	

Add New

Edit

Expire

Remove

Date Availability Values

Valid From: 19/04/2024 To: 31/12/9998 No End

Service for the day/time selected is: ☒ Available ☐ Blocked

Monday ☐ No ☒ Yes ☐ Part

Tuesday ☐ No ☒ Yes ☐ Part

Wednesday ☐ No ☒ Yes ☐ Part

Step 3: Configure “Schedule As”

Within the **Shipping Option Detail** tab:

1. Locate the **Schedule As** field.
2. Select the appropriate option:
 - **AM Anytime**
 - **PM Anytime**

This ensures the slot is categorised correctly.

Shipping Options

Group: [All]

Edit >

Create Using

New >

Delete

Carrier Small Item Expedited Delivery

Carrier Small Item Standard

Next Day Delivery

Next Day Delivery AM

Next Day Delivery PM

Special Order

Standard Anytime Delivery

Shipping Settings

Shipping Option Availability | Shipping Option Detail | Basket Rules

Control the days this option will be offered.

☐ Allow Simple (Undated) Options:

Allow Delivery On

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday

☒ Saturday ☒ Sunday

Schedule As: AM: Any time

Holidays: Any time

AM: Any time

PM: Any time

Below set when the service can be ordered for the option. For example a Next Day Delivery could offer a delivery date from the next day (Min. Days Ahead = 1) to 1 week (Max. Days Ahead = 7).

Min Days Ahead: 1 Max Days Ahead: 1

Service is	Start Date	End Date
Allowed	18/04/2024	31/12/9998

Step 4: Result on the Website

Once configured:

- The **new AM/PM delivery options** will appear alongside existing shipping methods at checkout.
- **Availability logic:**
 - **AM/PM slots** are only offered if engineers are available for those slots in NCompass.
 - The **Anytime option** always appears, as long as there are delivery points available for that day.

Google

Google Promotions ID

This guide explains how to associate products in NCompass with the `promotion_id` attribute required for Google Merchant Center promotions. This allows you to run targeted promotions for groups of products as outlined in Google’s documentation:

[Google Merchant Promotions - About the promotion_id attribute](#)

Step 1: Create the `promotion_id` Attribute in NCompass

To begin, you need to create a new attribute that links products to Google’s `promotion_id`.

Instructions:

1. **Log in to NCompass.**
2. Navigate to **Department Management**.
3. Highlight the **"All Departments"** category.
4. Click the **Web** tab.
5. Select **Define Features**.
6. In the new window, click **Create New** and enter the following details:

Field	Value
Display Name	Google Promotion ID [Hide]
Use as Filter	Unchecked
Display Priority	-1
Feature Type	Dropdown
Map To Web Attribute ID	<code>googlepromoid</code>

“ **Tip:** The `[Hide]` tag in the Display Name ensures this feature doesn’t appear on the frontend filter panel.

Video Walkthrough

A short video demonstrating how to create this attribute in the Department Administration panel is available below.

Step 2: Assign Promotion IDs to Products

Once the attribute is created, you can assign promotion IDs to individual or bulk product listings using the new `googlepromoid` field either through ncompass price import facility, OR assigning the feature manually on a product level basis. If you require further information on how to manage your price imports , or managing features on products, please reach out to our support email on support@findesolutions.com

Once you synchronise products to your website with the value inside that attribute, these will correctly display in the merchant feed with a `promotion_id` value against the product

Min/Max Energy Efficiency Class Google Feed Support

Where you might not be using our energy rating service (this would be setup for you as part of this energy rating service which is a chargeable module) you can reach out to admin@findesolutions.com to find out more information on this.

This setup enables your Google product feed to include the following optional energy efficiency attributes, which are used to define the range of energy classes available for a product:

- **min_energy_efficiency_class**: Indicates the **lowest** energy efficiency class within the product range.
Example: `"min_energy_efficiency_class": "D"`
- **max_energy_efficiency_class**: Indicates the **highest** energy efficiency class within the product range.
Example: `"max_energy_efficiency_class": "A++"`

These values help Google display more detailed energy information for applicable products, improving compliance and visibility in search results.

1. Attribute Configuration Instructions

To enable this in your system:

1. Open NCompass and navigate to: **Administration > Department Management**
2. **Select** the **"All Departments"** category.
3. On the **right panel**, click on **"Web"**.
4. Scroll down to **"Define Features"**.
5. Click **"Create New"** from the central list of buttons.

Fill in the following fields:

- **Display Name:** `Energy Rating Group`
- **Use as filter:** *Unchecked*
- **Display Priority:** `-1`
- **Feature Type:** `Free Text`
- **Map To Web Attribute ID:** `energyrating_eprlgroup`

Feature Definitions for All Departments

Features

- Certification Authority [Hide]
- Certification Code [Hide]
- Certification Name [Hide]
- Energy Label Link
- Energy Rating
- Google Promotion ID
- Meta Description
- Meta Keywords
- Meta Title
- Out Of Stock Message Override
- Product Datasheet
- Special Offer Text 1

Feature Details

Display Name:

If units apply, please specify in brackets, e.g. 'Weight (kg)'

Feature Details | **Feature Rules** | **Feature Links**

☐ Use as Filter ☐ System Attribute ☐ Use for Category Mapping

Display priority: ☒ Interpolate Answers

Feature Type:

Link Mode:

Map To Web Attribute ID:

☐ Include as Ticket Feature:

Default value:

6. Click **Save**.

2. Applying Energy Rating Values to Products

Once set up, assign values based on the energy class range used:

Range Used	Value to Input
A to G (newer scale)	2019
A+++ to D (older scale)	2013

- Apply the relevant value to the **Energy Rating Group** feature for each product like so.

Under the **Product Information > Web** tab for the item, locate the new feature created, and populate with the required value.

Product Details

Standard Product

EPI+/PIM Linked: Calculus Epi (C,I,F,R) Link ...

General Stock Control Financial Warranty Rental EPI Labels Ordering Web Associated Products Kits/Bundles Notes Quotations Change T

Web / Multi-Channel Settings... Change settings for display of this Product on your web-sites, Amazon and eBay

This product is enabled on the site and has PIM Data

Product Features

Feature	Value	DefaultValue
Certification Authority [Hide]	European_Commission	
Certification Code [Hide]	912637	
Certification Name [Hide]	EPREL	
Depth	<empty>	
Energy Label Link	B	
Energy Rating	B	
Energy Rating Group	2019	
Google Promotion ID	<empty>	
Height	<empty>	
Installation type	<empty>	
Meta Description	<empty>	
Meta Keywords	<empty>	
Meta Title	<empty>	
Out Of Stock Message Override	<empty>	
Product Datasheet	<empty>	
Special Offer Text 1	<empty>	
Width	<empty>	

Configure Features Set and maintain the values shown for the features for this Product on your web-site

This will then appear in the feed like the following for use by google merchant centre, or any other agency required to use the min/max efficiency class.

```

<link>
  https://www.tvatech.co.uk/h Hoover-hlec8dg-1000005887.html
</link>
<g:image_link>
  https://www.tvatech.co.uk/media/catalog/product/h/o/h Hoover_hlec8dg_896321_34-0100-0234.png
</g:image_link>
<g:condition>new</g:condition>
<g:product_type>Default Category > Laundry > Tumble Dryer</g:product_type>
<g:google_product_category>2612</g:google_product_category>
<g:sku>1000005887</g:sku>
<g:availability>in_stock</g:availability>
<g:price>299.99 GBP</g:price>
<g:brand>Hoover</g:brand>
<g:mpn>HLEC8DG</g:mpn>
<g:agency>Euronics Agency</g:agency>
<g:shipping_weight>
<g:gtin>8059019037943</g:gtin>
<g:promotion_id>
<g:energy_efficiency_class>B</g:energy_efficiency_class>
<g:min_energy_efficiency_class>G</g:min_energy_efficiency_class>
<g:max_energy_efficiency_class>A</g:max_energy_efficiency_class>
<g:certification>
  <g:certification_authority>22367</g:certification_authority>
  <g:certification_name>22365</g:certification_name>
  <g:certification_code>26985</g:certification_code>
</g:certification>
+<g:shipping></g:shipping>
</item>
<item>
  <g:additional_image_link>
    https://www.tvatech.co.uk/media/catalog/product/h/o/h Hoover_hlec8dg_896321_34-0100-0234.png
  </g:additional_image_link>

```

Embedding videos on your product pages

This feature is not enabled by default. Please contact the web team and request this feature be enabled.

NOTE: The video will need to be uploaded to a third party hosting platform like Youtube or Vimeo. This cannot be achieved with the raw video file.

It is possible to embed a video on your product pages using the video's URL.

The screenshot shows a product page for a Bosch WGG254F0GB 10kg 1400 Spin Washing Machine - White. The page layout includes a top navigation bar with the Calculus logo, a search bar, and links for My account and Basket. Below this is a secondary navigation bar with categories like Family Business, Free Local Delivery, Award Winning Service, and Service, Repairs, & Parts. The main content area features a large image of the washing machine, a vertical gallery of smaller images on the left, and a detailed product description on the right. The product name is 'Bosch WGG254F0GB 10kg 1400 Spin Washing Machine - White'. The price is £749.00, and it is marked as 'OUT OF STOCK' with a 'CONTACT US FOR AVAILABILITY' link. The product features include SUPER QUICK 30, SPEEDPERFECT, and ANTISTAIN. The energy rating is A, and the max spin speed is 1400. The washing capacity is 10 kg, and the depth is 58.8 cm. Additional information includes IronAssist and I-DOS Automatic dosing. The features listed are Super Quick 30, SpeedPerfect, and AntiStain.

Home > Laundry > Washing Machines > Freestanding > Bosch WGG254F0GB 10kg 1400 Spin Washing Machine - White

Bosch WGG254F0GB 10kg 1400 Spin Washing Machine - White

Product Video

BOSCH
Invented for life

Be the first to review this product

£749.00 **OUT OF STOCK**
CONTACT US FOR AVAILABILITY

ADD TO WISH LIST ADD TO COMPARE

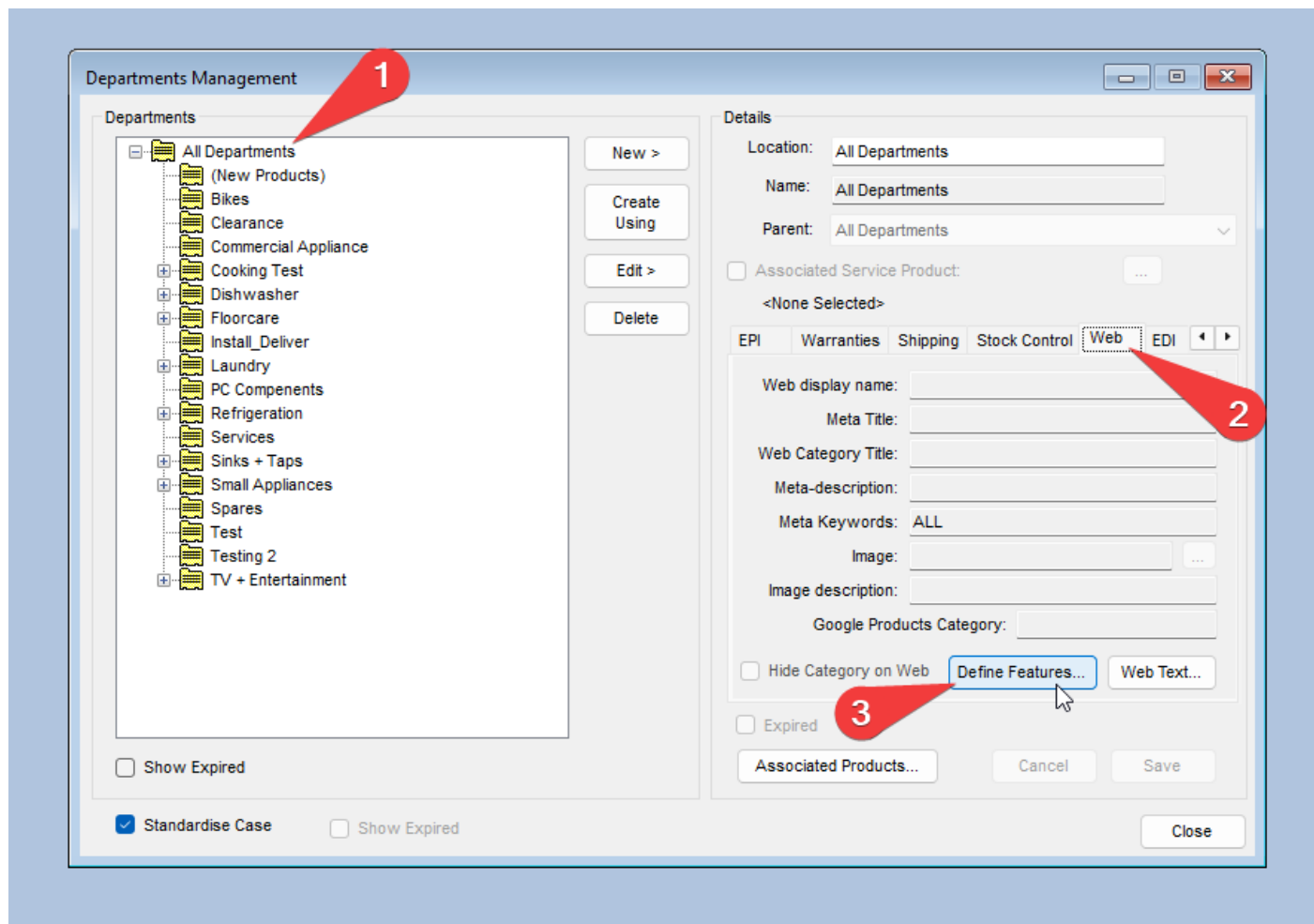
A

• Energy - Rating	A
• Max Spin Speed	1400
• Washing Capacity (KG)	10 kg
• Depth (CM)	58.8 cm
• Additional Information	IronAssist: Reduces wrinkles and your ironing pile, I-DOS Automatic dosing: Stop dosing, start saving., Continuous start delay
• Features	Super Quick 30, SpeedPerfect, AntiStain

Step 1: Setup

Setup for this takes place in NCompass

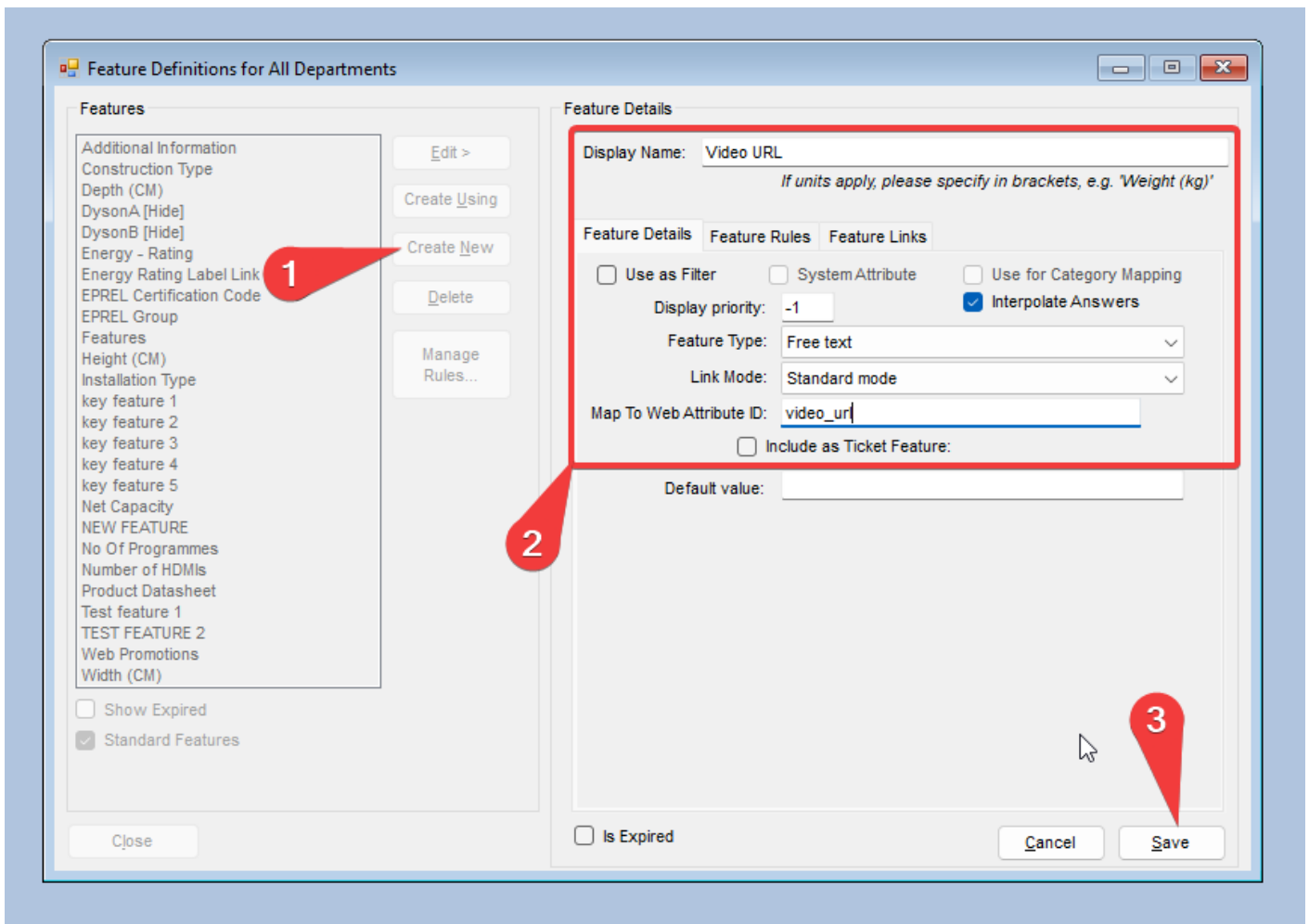
Navigate to **Administration > Department Management** and open **Define features** in the web tab of all departments



In this window create a new feature using the **Create New** button.

Populate the following fields before pressing **Save**

Field	Value
Display Name	Video URL
Use as Filter	Unchcked
Display Priority	-1
Featur Type	Free Text
Map To Web Attribute ID	video_url



Setup Complete

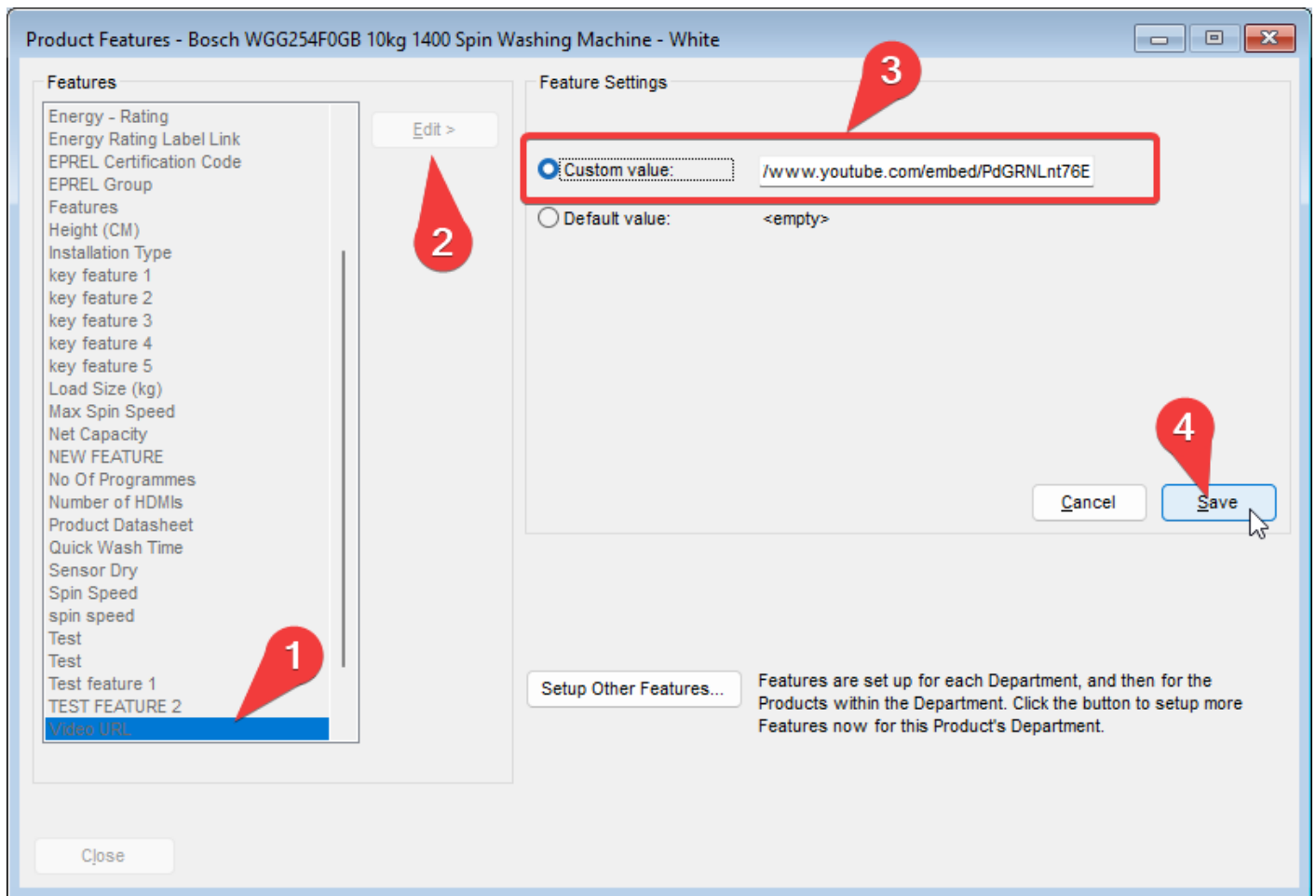
Step 2: Linking My Video

As the warning at the top of this guide states, you can only embed a video URL to your product pages. We do not currently support the upload of RAW video files.

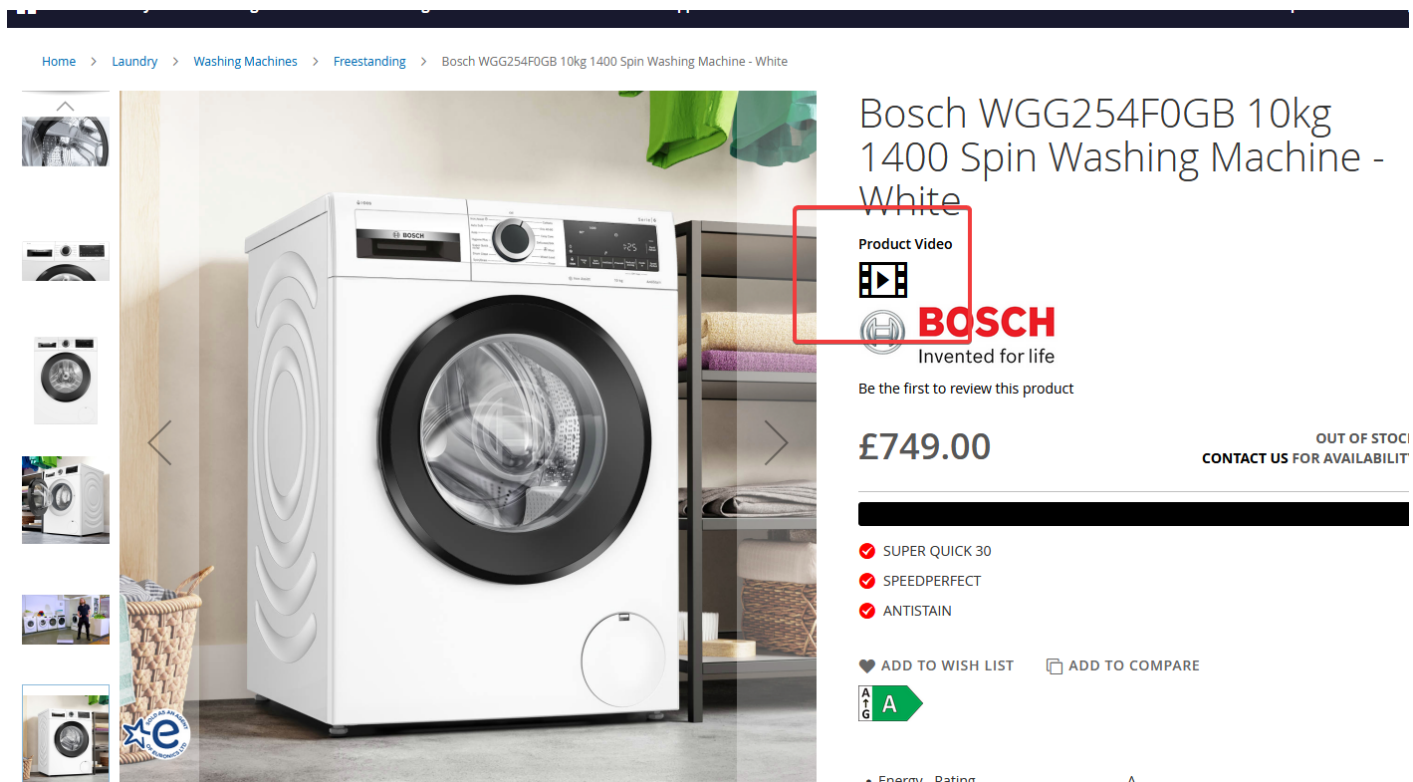
Navigate to the **Product Features** window for the product you are embedding the video to and select **Video URL** from the list of available features.

Press **Edit** and then select the **Custom Value:** radio button, pasting in the URL for your hosted video

NOTE: If you are using a YouTube video you will need to use the /embed URL instead of the standard /watch URL found in the address bar.



Once your product has synced to the website you will not see a video icon on the product display page which will open a popup containing your video.



Magento Email Change Request

This guide explains where staff should check and update email addresses in Magento Admin when a customer requests an email-address change for their website.

Purpose

Customer email changes can affect several different parts of a Magento site. Some email addresses control outgoing transactional emails, some receive form submissions, and some are only visible content shown in the footer or store-location pages.

Use this guide as a checklist so the requested email is updated in the right places and existing unrelated email addresses are not changed by mistake.

Before You Start

- Confirm the old email address and the new email address in writing from the customer.
- Ask whether the change is for visible website content, outgoing email senders, form recipients, or all of these.
- Check the correct store view or website scope before saving configuration changes.
- If the site has multiple store locations, check each relevant location block or page separately.
- Take a screenshot or note the original value before changing live configuration.

Quick Checklist

1. Stores > Configuration > Sales > Sales Emails.
2. Stores > Configuration > General > Store Email Addresses.
3. Stores > Configuration > General > Contacts, if the Contact Us form recipient needs changing.
4. Calculus custom form modules, such as Multi Buy, Product Enquiry, In Stock Alert, and Product Quote Request.
5. Content > Blocks filtered by footer, if the email appears in the website footer.
6. Content > Blocks searched by email, if the email appears on store-location content.
7. Content > Pages searched by the old email address, if no matching CMS block is found.
8. Frontend QA and cache flush after saving.

Core Magento Email Locations

Start with the standard Magento configuration. These settings control most of the normal email behaviour on the site.

Sales Emails

Magento Admin path: Stores > Configuration > Sales > Sales Emails.

Check this area when the customer asks about order confirmation, invoice, shipment, credit memo, or sales update emails.

Open the correct scope from the top-left scope selector before editing.

Check each expanded section under Sales Emails, including Order, Invoice, Shipment, Credit Memo, and their comment/update sections.

Look for Sender, Send Order Email Copy To, Copy Method, Enabled, and Template fields.

If the field uses an Email Sender identity, update the actual email address under Store Email Addresses rather than only changing Sales Emails.

Save Config when complete.

Store Email Addresses

Magento Admin path: Stores > Configuration > General > Store Email Addresses.

This is the main place to update sender identities used by Magento and by many custom modules.

Check General Contact, Sales Representative, Customer Support, Custom Email 1, and Custom Email 2.

Update both Sender Name and Sender Email where the customer has asked for a full identity change.

Make sure the scope is correct. Some sites use different sender emails per website or store view.

Save Config after changing the values.

Contact Form Recipient

Magento Admin path: Stores > Configuration > General > Contacts.

Check Email Options > Send Emails To if the standard Magento Contact Us form recipient needs changing.

Check Email Sender if the customer wants the outgoing sender identity changed.

Save Config when complete.

Calculus Custom Modules

Some sites have custom enquiry forms that send emails to specific recipient fields. If the customer uses any of these frontend forms, check their configuration as well as the core Magento settings.

The common pattern is that each module has a To Email field and an Email Sender field. To Email controls where the form submission goes. Email Sender usually points to one of the Store Email Addresses identities.

Common Module Checks

Calculus > Multi Buy > Multi Buy Module Configuration: check To Email and Email Sender.

Calculus > Product Enquiry > Product Enquiry Module Configuration: check To Email and Email Sender.

Calculus > In Stock Alert > In Stock Alert Module Configuration: check To Email and Email Sender.

Calculus > Product Quote Request > Product Quote Module Configuration: check To Email and Email Sender.

Custom Module Notes

Only change a module if the site uses that form or the customer specifically mentions that enquiry type.

If a To Email field contains multiple email addresses, keep the existing comma-separated format and only replace the address requested.

If Email Sender is set to Sales Representative, Customer Support, or another identity, update that identity under Store Email Addresses if needed.

Footer Email Content

Magento Admin path: Content > Blocks.

Use this when the email address appears in the footer of the website, such as a store address block with telephone and email details.

1. Open Content > Blocks.
2. Use Filters and search Identifier for footer.
3. Compare the block Title with the footer section on the frontend. For example, a visible footer title such as Visit Aspull Domestics may correspond with a block like footer-block-3.
4. Open the matching block.
5. Search the block content for the old email address.
6. Update both the visible email text and any mailto: link if present.
7. Save the block.

Frontend footer area showing the store contact email.

Useful Links

About Aspull Domestic
Contact Us
Spares & Repairs
Finance Options
Privacy Policy
Terms & Conditions

My Account

My Orders
My Addresses
My Personal Information

Visit Aspull Domestic

Aspull Domestic
Unit 4 - 5
Caroline Street
Wigan
WN3 4EL
Tel: 01942 833 908
Email: info@allspareswigan.com

Follow us on Facebook



Aspull Domestic
2,479 followers

Follow Page

Share

CMS Blocks grid filtered by Identifier footer and matched by block Title.

Search by keyword

Active filters: Identifier: foot

Filters:

ID: from to

Created: from to

Modified: from to

Store View: All Store Views

Asset: Select...

Title:

Identifier: foot

Status: Select...

Actions 4 records found per page of 1

☐	ID	Title	Identifier	Status	Created	Modified	Action
☐	2	Useful Links	footer-block-1	Enabled	Feb 27, 2020 12:13:57 PM	Nov 12, 2024 11:09:31 AM	Select v
☐	3	My Account	footer-block-2	Enabled	Feb 27, 2020 12:32:16 PM	Nov 12, 2024 11:09:32 AM	Select v
☐	49	Visit Aspull Domestic	footer-block-3	Enabled	Jul 8, 2020 3:07:38 PM	Apr 27, 2026 5:07:07 PM	Select v
☐	50	Follow us on Facebook	footer-block-4	Enabled	Jul 8, 2020 3:08:49 PM	Nov 12, 2024 11:10:13 AM	Select v

Store Location Email Blocks

Magento Admin path: Content > Blocks.

Store pages and location sections are often built from CMS blocks. If the customer has multiple store locations, each location may have its own email block.

1. Open Content > Blocks.
2. Search by keyword email.
3. Open every relevant location block, such as Location Store 1 Email.
4. Check whether there are multiple location blocks for the customer.
5. Update the visible email address and any mailto: link in each block that should change.

6. Do not change other branch emails unless the customer requested those as well.

7. Save each changed block.

Screenshot placeholder: CMS Blocks keyword search for email showing location email blocks.

CMS Pages

If the email cannot be found in a CMS block, also check CMS pages.

Go to Content > Pages.

Search for the old email address or the store/location name.

Open matching pages and check PageBuilder, HTML, and inserted CMS block references.

Update visible text and mailto: links where required.

Saving And Cache

After configuration changes, select Save Config.

After CMS block or page changes, select Save.

Flush Magento cache if the frontend does not update straight away.

If the site uses LiteMage or another full-page cache, clear that cache as well.

Recommended QA Before Closing The Request

Check the frontend footer on desktop and mobile.

Check every store-location page that was changed.

Click visible email links and confirm the mailto: address is correct.

Submit a safe test on affected enquiry forms if the recipient email was changed and the customer expects form routing to change.

Check a Magento transactional email only where the customer requested sender changes for sales emails. (An old sales order can be located placed by a company address and you can trigger this by opening the order, and clicking "Send Email" at the top ***this might take up to 15 minutes to arrive in the recipients email inbox***)

Confirm the old email address is no longer present in the changed CMS blocks or configuration areas.

Troubleshooting

If the frontend still shows the old email, flush Magento cache and any full-page cache, then check the correct store view was edited.

If an email sender still shows the old address, check Store Email Addresses for the identity selected in Sales Emails or the custom module.

If form submissions still go to the old address, check the module To Email field rather than only the sender identity.

If a footer block was edited but the page did not change, confirm the frontend footer title matches the CMS block title or identifier.

If there are several store locations, search Content > Blocks for email and review every location-specific block for "email".

Useful Admin Paths

Stores > Configuration > Sales > Sales Emails.

Stores > Configuration > General > Store Email Addresses.

Stores > Configuration > General > Contacts.

Calculus > Multi Buy.

Calculus > Product Enquiry.

Calculus > In Stock Alert.

Calculus > Product Quote Request.

Content > Blocks.

Content > Pages. (if the email is presently on any cms pages ***THIS IS WORTH CHECKING***)

Product Advisor

Product Page Custom Tabs (WIP)

Setting Up Custom Product Tabs

This guide is for setting up new tabs below products.

Details	Features	Reviews
---------	----------	---------

Introducing the Ninja XSKOGXLRBRKEU Woodfire XL Electric BBQ Rib Rack in a sleek silver color. This rib rack is perfect for grilling ribs to perfection with its large size and electric heating element.

Key features include:

- Extra large size for grilling multiple racks of ribs at once
- Electric heating element for consistent and even cooking
- Durable construction with a sleek silver finish
- Easy to clean and maintain
- Perfect for outdoor BBQs and gatherings

Creating the feature in NCompass

Navigate to **Administration > Department Management**.

Select the **Web** tab and click **Define Features**.

Departments Management

Departments

- All Departments
- [New Products]
- 5% VAT Sundry
- Accessories
- Clearance
- Cooking
- Delivery Charges
- Dishwashers
- Floorcare
- Imported
- Kitchen Accessories
- Kitchen Web Items
- Kitchens
- Laundry
- Refrigeration
- Service
- Sinks/Taps
- Small Appliances
- Tiles
- TV + Audio

New >
Create Using
Edit >
Delete

☐ Show Expired
☒ Standardise Case

☐ Show Expired

Details

Location: All Departments
Name: All Departments
Parent: All Departments

☐ Associated Service Product: <None Selected>

EPI Warranties Shipping Stock Control **Web** EDI

Web display name:
Meta Title:
Web Category Title:
Meta-description:
Meta Keywords: ALL
Image:
Image description:
Google Products Category:

☐ Hide Category on Web Define Features... Web Text...

☐ Expired
Associated Products... Cancel Save

Close

Create a new feature, the **Display Name** will be the name of the tab on the website.

Set the **Display priority** to -99, **Feature Type** to Dropdown, and **Link Mode** to Standard mode.

Customer Account/Trade Management

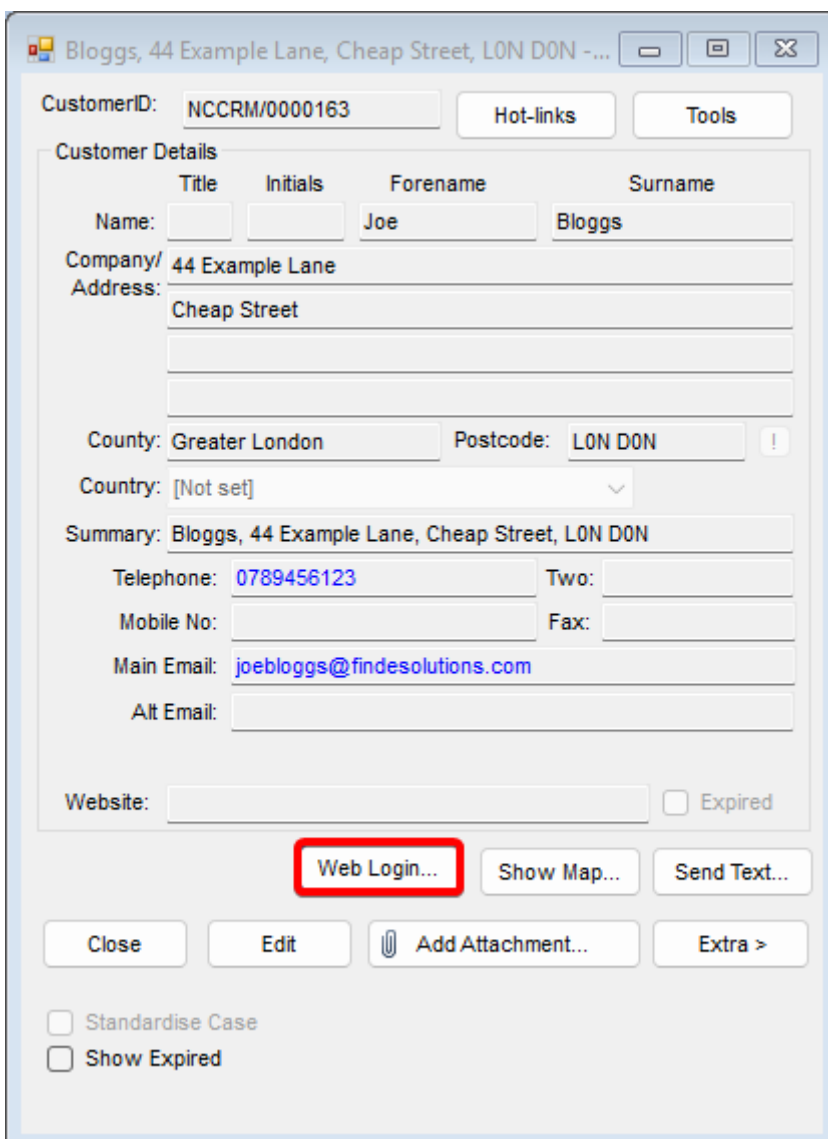
Creating a Trade Account for a Customer

Overview

If a customer does not currently have a trade account on your website, you can create one through Ncompass. Once created, the customer will be able to access the website using their new login details.

Instructions

1. In Ncompass, go to **Customers > Enquiry**.
2. Find the relevant customer.
 - If the customer does not exist, create a new customer record first.
3. Select the **Web Login** button, as shown in the image below.



The screenshot shows a web application window titled "Bloggs, 44 Example Lane, Cheap Street, LON DON -...". The form contains the following fields and buttons:

- CustomerID:** NCCRM/0000163
- Hot-links** and **Tools** buttons.
- Customer Details** section:
 - Name:** Fields for Title, Initials, Forename (Joe), and Surname (Bloggs).
 - Company/Address:** 44 Example Lane, Cheap Street.
 - County:** Greater London, **Postcode:** LON DON.
 - Country:** [Not set] (dropdown menu).
 - Summary:** Bloggs, 44 Example Lane, Cheap Street, LON DON.
 - Telephone:** 0789456123, **Two:** (empty field).
 - Mobile No:** (empty field), **Fax:** (empty field).
 - Main Email:** joebloggs@findesolutions.com, **Alt Email:** (empty field).
 - Website:** (empty field), ☐ Expired.
- Web Login...** button (highlighted with a red box).
- Show Map...** and **Send Text...** buttons.
- Close**, **Edit**, **Add Attachment...**, and **Extra >** buttons.
- ☐ Standardise Case, ☐ Show Expired.

4. In the **Customer Web Accounts** window, click **Create New**.
5. Set **Account Type** to **Website**.
6. Under **New Account Options**, select **Create New Login On Website**.
7. Enter the customer's email address.
8. Add a note if required for future reference. This is optional.
9. Click **Save**.

The screenshot shows a software window titled "Customer Web Accounts - Bloggs, 44 Example Lane, Cheap Street, LON DON". The window is divided into several sections:

- Accounts:** A list area on the left with buttons "Edit >", "Create Using", "Create New" (highlighted with callout 1), and "Delete".
- Account Details:**
 - Account Type:** A dropdown menu set to "Website" (highlighted with callout 2).
 - Web Domain:** A dropdown menu set to "(Web Site)".
 - New Account Options:** Three radio button options. The first, "Create New Login On Website" (highlighted with callout 3), is selected. The other two are "Link To Existing Login On Website And Update Website To Match NCompass" and "Link To Existing Login On Website And Update NCompass To Match Website".
 - Account Settings:**
 - Email:** A text field containing "joebloggs@findesolutions.com" (highlighted with callout 4).
 - Web Account ID:** An empty text field.
 - Notes:** An empty text area.
 - A note below the fields: "Customer must reset password on first login."
 - Delivery Sites:** An empty list area with buttons "Add...", "Details...", and "Remove" below it.
- Footer:** Checkboxes for "Expired" (unchecked) and "Show Prices" (checked), and "Cancel" and "Save" buttons.

Result

The customer's website account will be created automatically after you save the record, provided the website integration supports this functionality.

Customer Account/Trade Management

My Account / Statements

Managing Search Terms & Redirects

This guide explains how to manage search terms, redirect customer searches, and create permanent (301) URL redirects in Magento 2.

Before you begin

- You must have access to the Magento Admin.
- If the website has multiple store views, confirm which store view the change should apply to.
- For category navigation managed by NCompass, create the department or category in NCompass first and allow the synchronisation process to create it in Magento.

“ **Important:** Search term redirects and URL rewrites serve different purposes. Use a search term redirect when a customer enters a particular phrase in the website search. Use a URL rewrite when an existing page address must send visitors to a different page.

1. Add a search term

Search terms can improve the customer journey by directing common queries to more relevant results or a specific landing page.

1. Sign in to the Magento Admin.
2. From the sidebar, go to **Marketing > SEO & Search > Search Terms**.
3. Select **Add New Search Term**.
4. Complete the fields under **General Information**:
 - **Search Query:** Enter the word or phrase customers are expected to search for.
 - **Store View:** Select the store view to which the term applies.
 - **Redirect URL:** Optional. Enter the destination URL if the query should open a particular page instead of displaying normal search results. This may be an internal page or a full external URL.
 - **Display in Suggested Terms:** Set this to **Yes** if the term should be suggested when a search returns no results.
5. Select **Save Search**.

Example

A search query such as `televisions` could redirect customers to the main television category page.

The screenshot shows a dashboard with a sidebar on the left containing navigation links: DASHBOARD, SALES, PRODUCTS, CUSTOMERS, MARKETING, CONTENT, REPORTS, STORES, SYSTEM, and FIND PARTNERS & EXTENSIONS. The main area is titled 'Search Terms' and includes a search bar, a 'Add New Search Term' button, and a table of existing search terms. The table has columns for Search Query, Store, Results, Uses, Redirect URL, Suggested Terms, and Action. Five search terms are listed: 'tee shirt racer back', 'hoodie', 'gray hoodie', 'womens hoodie', and 'racer back'. Each row has an 'Edit' link in the Action column.

☐	Search Query	Store	Results	Uses	Redirect URL	Suggested Terms	Action
☐	tee shirt racer back	Main Website Main Website Store English	62	1		yes	Edit
☐	hoodie	Main Website Main Website Store English	20	2		yes	Edit
☐	gray hoodie	Main Website Main Website Store English	54	1		yes	Edit
☐	womens hoodie	Main Website Main Website Store English	20	1		yes	Edit
☐	racer back	Main Website Main Website Store English	39	2		yes	Edit

2. Edit an existing search term

1. Go to **Marketing > SEO & Search > Search Terms**.
2. Select the relevant row in the Search Terms grid to open it.
3. Update the required fields.
4. Select **Save Search**.

3. Delete a search term

A search term can be deleted from either the grid or its edit page.

Option A: Delete from the grid

1. Go to **Marketing > SEO & Search > Search Terms**.
2. Select the checkbox beside the term.
3. Set **Actions** to **Delete**.
4. Select **Submit** and confirm the deletion if prompted.

Option B: Delete from the edit page

1. Open the relevant search term from the Search Terms grid.
2. Select **Delete Search**.

3. Select **OK** to confirm.

4. Search Terms grid reference

Column	Description
Search Query	The word or phrase used to perform the search.
Store	The store view in which the query applies.
Results	The number of results returned for the query.
Uses	The number of times the query has been used.
Redirect URL	The destination page used when the query is redirected.
Suggested Terms	Shows whether the query can appear as a suggested term.
Actions	Opens the search term for editing.

5. Create a permanent 301 URL redirect

Use a URL rewrite when an old or alternative URL must permanently direct visitors to a new destination. A permanent 301 redirect also tells search engines that the page has moved.

Step 1: Identify the destination

1. Open the destination page on the website.
2. Copy the part of its URL that appears after the domain name. For example, from `https://www.example.co.uk/televisions.html`, copy `televisions.html`.
3. In Magento Admin, go to **Marketing > SEO & Search > URL Rewrites**.
4. Search the **Request Path** column for the copied value.
5. Open the matching rewrite and note its **Target Path**. A category target may resemble `catalog/category/view/id/2966`.

Step 2: Add the redirect

1. Return to the URL Rewrites grid and select **Add URL Rewrite**.
2. Set **Create URL Rewrite** to **Custom**.
3. Complete the following fields:
 - **Request Path:** Enter the old address that should redirect. Do not include the domain name or a leading slash. Example: `old-televisions.html`.
 - **Target Path:** Enter the destination. For a Magento category, use the target path identified above. For another internal page, use its relative URL key or path. For an external website, enter the complete URL, including `https://`.
 - **Redirect Type:** Select **Permanent (301)**.
 - **Store View:** Select the appropriate store view if this field is available.
 - **Description:** Optional, but recommended. Briefly record why the redirect was created.
4. Select **Save**.



Internal links: Use a relative path rather than the full website domain where possible. This prevents the redirect from becoming tied to the current domain name.

Step 3: Clear the cache and test

1. Go to **System > Cache Management**.
2. Select **Flush Magento Cache**.
3. Open a private or incognito browser window.
4. Visit the old URL and confirm that it opens the intended destination.
5. Confirm that the browser does not enter a redirect loop and that the destination page loads normally.

Troubleshooting

The old URL returns a 404 page

- Confirm that the Request Path does not contain the domain name or a leading slash.
- Check that the rewrite was created for the correct store view.
- Flush the Magento cache and test again.

The redirect opens the wrong page

- Check the Target Path against the URL rewrite belonging to the intended destination.
- Search the URL Rewrites grid for another entry using the same Request Path.
- For external destinations, confirm that the full URL includes `https://`.

The redirect loops

- Ensure the Request Path and Target Path do not resolve to the same address.
- Check whether another Magento, web-server, or CDN redirect points back to the original URL.

Completion checklist

- The correct store view has been selected.
- The Request Path contains no domain name or leading slash.
- The Target Path points to the intended internal page or complete external URL.
- The redirect type is Permanent (301).
- The Magento cache has been flushed.
- The old URL has been tested in a private browser window.

NCompass B2B (accounts
integration)

Helpdesk Introduction

Helpdesk Promotional Information Block

The Helpdesk supports an optional **promotional/information block** which is displayed at the top of the Helpdesk when content has been configured.

This block can be used for promotional banners, service announcements, important customer information, or other content that should be visible when a customer accesses the Helpdesk.

The screenshot displays the NCompass B2B Helpdesk interface. At the top, there is a header with the 'calculus' logo and a 'My account' link. Below the header is a navigation bar with links: 'NCOMPASS ADVANCED RETAIL', 'WEBPRESENCE ECOMMERCE', 'SUPPORT', 'MORE', 'CONTACT US', and 'NEWS'. On the left side, there is a sidebar menu with options: 'My Account', 'My Orders', 'My Wish List', 'Address Book', 'Account Information', 'Help Desk' (highlighted), 'My Product Reviews', and 'Logout'. Below the sidebar, there is a 'Compare Products' section stating 'You have no items to compare.' The main content area is titled 'Help Desk' and features a prominent yellow promotional banner for the 'ert AWARDS 2026' with the text 'VOTE FOR US!' and '15 OCTOBER 2026 | THE GRAND CONNAUGHT ROOMS, LONDON'. Below the banner, there is a 'Submit a ticket' button and a dropdown menu for 'Show the active service jobs'. A search bar is present with the text 'Quick search (Min. 3 characters to search in: Job Number, Subject, Reported By, Status)'. Below the search bar, there is a table of tickets with columns: 'Job nr.', 'Subject', 'Reported By', 'Status', 'Priority', and 'Last Activity'. The table shows 1-18 / 18 tickets and is on page 1.

Recommended Banner Dimensions

By default, the Helpdesk information block is configured with:

- **Maximum width:** 1060px
- **Maximum height:** 140px

Both dimensions are configurable through the website design and can be changed if required. However, it is recommended that the default dimensions are retained where possible.

Keeping the banner within **1060 x 140px** prevents promotional content from becoming too prominent and ensures that the main Helpdesk functionality remains the primary focus for the customer.

Important: Content larger than the configured dimensions may be restricted or cropped by the Helpdesk's maximum width and height settings.

Locating the Helpdesk Banner Block

To manage the Helpdesk promotional block within Magento:

1. Log in to the **Magento Administration Panel**.
2. Navigate to **Content > Blocks**.
3. Search or filter the block list for the following identifier:
`helpdesk-banner`
4. Locate the relevant block.
5. From the **Select** menu, choose **Edit**.

Blocks

🔍🔔👤 jane@findesoluti...

Add New Block

Search by keyword 🔍

FiltersDefault ViewColumns

Active filters: Identifier: helpdesk-banner

Clear all

ID

from

to

Created

from

to

Modified

from

to

Store View

All Store Views

Asset

Select...

Title

Identifier

helpdesk-banner

Status

Select...

CancelApply Filters

Actions1 records found20 per page1 of 1

ID	Title	Identifier	Status	Created	Modified	Action	Store View
117	helpdesk-banner	helpdesk-banner	Enabled	Aug 19, 2026 1:37:44 PM	Aug 19, 2026 1:52:53 PM	Select	All Store Views

Any content configured within this block will be displayed in the promotional information area at the top of the Helpdesk.

Creating the Block

If the `helpdesk-banner` block does not already exist:

1. Navigate to **Content > Blocks**.
2. Click **Add New Block**.
3. Configure the block using the following values:

Field	Value
Block Title	helpdesk-banner
Identifier	helpdesk-banner

4. Add the required promotional or informational content.
5. Ensure the block is enabled.
6. Click **Save**.

helpdesk-banner Q 🔔 👤 jane@findesolut...

← Back Delete Block **Save** ▼

Enable Block ☒ Yes

Block Title * helpdesk-banner

Identifier * helpdesk-banner

Store View * ?

- All Store Views
- Main Website
- Main Website Store
- Default Store View

ROW

Edit with Page Builder

Once saved, content within this block will be available for display at the top of the Helpdesk.

Updating the Banner Content

The block can contain standard Magento CMS content, including text and imagery.

When adding a banner image, it is recommended that the artwork is designed specifically for the available **1060 x 140px** area rather than taking a larger image and stretching it to fit.

This helps maintain image proportions and avoids banners appearing distorted or compressed.

Applying Changes to the Frontend

After creating or modifying the `helpdesk-banner` block, flush the Magento cache to ensure the updated content is displayed on the storefront.

Navigate to:

System > Cache Management

Then select:

Flush Magento Cache

Once the cache has been flushed, return to the Helpdesk on the frontend and confirm that the promotional information block is displaying correctly.

Removing the Promotional Block

If promotional information is no longer required, remove the content from the `helpdesk-banner` block or disable the block.

An empty block will prevent promotional content from occupying unnecessary space at the top of the Helpdesk.

Accessing the Helpdesk from NCompass Desktop

Screenshots for this page still need to be captured and added when it is reviewed.

The Helpdesk is the online portal where a customer can see the support tickets they have open with us, add to them, and raise new ones without having to telephone the Support team. NCompass Desktop can open the Helpdesk directly and sign the user in on the way, so nobody has to remember a second login or leave NCompass to check a ticket.

Where it lives in NCompass

Both entry points are on the **Help > Support** menu, and both open the Helpdesk inside an NCompass browser window rather than in the user's normal web browser:

- **Help > Support > Online Helpdesk** — opens the main Helpdesk page, showing the customer's existing tickets.
- **Help > Support > New Support Ticket** — opens the Helpdesk on the page for logging a new ticket. This replaced the older *Log New Service Job* option, which raised the request a different way.

Settings

The Helpdesk settings are in **Tools > Configuration > EDI > Calculus > Support Helpdesk**.

Setting	What it does
Helpdesk - Main URL	The address of the Helpdesk itself. This is the page <i>Online Helpdesk</i> opens, and the address the main email tag embeds.
Helpdesk - Log New Ticket URL	The address <i>New Support Ticket</i> opens.
Helpdesk - Job Deeplink URL	The address pattern used to link straight to one ticket. See the note below on the placeholders it accepts.
Helpdesk - Username	The customer's Helpdesk account name, used for the automatic sign-in.
Helpdesk - Password	The password for that account. Held as a password setting, so it is not readable once entered.

The addresses are normally already populated with our standard values, so on most systems the only thing that needs setting is the username and password for the customer's own Helpdesk account.

How signing in works

When a user picks either menu option, NCompass signs in to the Helpdesk in the background using the stored username and password, and then opens the requested page with that session already established. The user does not see a login page and is not asked to type anything.

If the username and password have not been filled in yet, a short prompt appears asking for them. What is entered there is saved into the settings above, so the sign-in is automatic from then on. The prompt offers the option to save them globally, which means everyone in the business then reaches the Helpdesk through the same account — this is usually what a customer wants.

The prompt is only offered to users who have access to Tools > Configuration. After an update it is therefore worth someone with high-level NCompass access being the first to open *Help > Support > Online Helpdesk*, so the details are captured for everybody else.

Helpdesk links in emails

Two tags are available in service job email templates, so a message about a repair can point the recipient at the Helpdesk:

Tag	What it produces
%SJHELPDESK.MAIN%	A link reading <i>Online Helpdesk</i> , pointing at the Helpdesk Main URL.
%SJHELPDESK.JOBCODE:xxx%	A link reading <i>Support Ticket</i> followed by the job number, pointing straight at that job using the deeplink address.

The second tag is typed into the template exactly as shown, including the :xxx ending — that is part of the tag, not something to replace with a job number. Both tags produce a ready-made hyperlink, so they belong in an HTML email template; in a plain text email the reader will see the underlying markup instead of a link. Both only fill in when the email is being produced from a service job.

Deeplink address placeholders

The *Helpdesk - Job Deeplink URL* setting is a pattern rather than a fixed address, and NCompass substitutes two things into it before using it:

- **{main_url}** is replaced with whatever is in *Helpdesk - Main URL*, so the deeplink pattern does not have to repeat the site address.
- **{%JOBNUMBER%}** is replaced with the job reference. The curly brackets are part of the placeholder and are required; the setting's own on-screen description shows it without

them. If a deeplink comes through pointing at the Helpdesk home page rather than the ticket, check the brackets first.

When it does not work

- If the Helpdesk opens but shows its own login page, the stored username or password is wrong, or the account has been changed or disabled at the Helpdesk end. Re-entering them through Tools > Configuration is enough; there is nothing else to clear down.
- If nothing opens at all, check the relevant URL setting is populated.
- Helpdesk access is not tied to any other module — a customer does not need to be set up for NCompass Anywhere, or hold any particular licence, to use it.