



Novtel®

Relations Management

Sage



www.novtel.com
www.novtel.co.za



The Basics of Novtel Relations Management

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Relations Management

1

Introduction

Introduction

Novtel Relations Management integrates with:

Microsoft Products



Word



Excel



Outlook



Access



SQL

Financial Systems



Partner (50C)
Evolution (200)



Xero Accounting

Other Novtel Software Packages

- ✓ Property Management
- ✓ Hospitality Management
- ✓ Vehicle Hire
- ✓ Self Storage
- ✓ Equipment Hire
- ✓ Procurement
- ✓ Access Control
- ✓ Contract Management

Introduction

With Relations Management, Novtel will help any organisation take control of its communication and interaction activities as it occurs.

Novtel Relations Management Software was designed with the intent of:

- ✓ Managing communication between your company and its Customers, Suppliers; Prospective Customers and Suppliers, and its Employees.





Introduction

When the full version of Novtel Relations Management is purchased, there will be no restriction on the following:

The number of concurrent Users (Local or Network)



Backing Up and Restoring Data

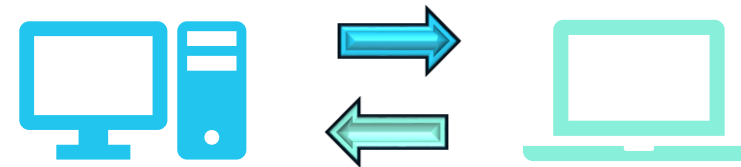


The number of Databases for Novtel and integrated with:

- ✓ Sage Pastel
- ✓ Sage Evolution
- ✓ Xero



Transferring Data to Another PC



Introduction

Please note that for demonstration purposes, our Company integrates with Sage Pastel Partner.

Also note that the purpose of this document is to discuss the basics of Relations Management, and more detailed manuals are available on each subject discussed here, and MUCH more.



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Relations Management

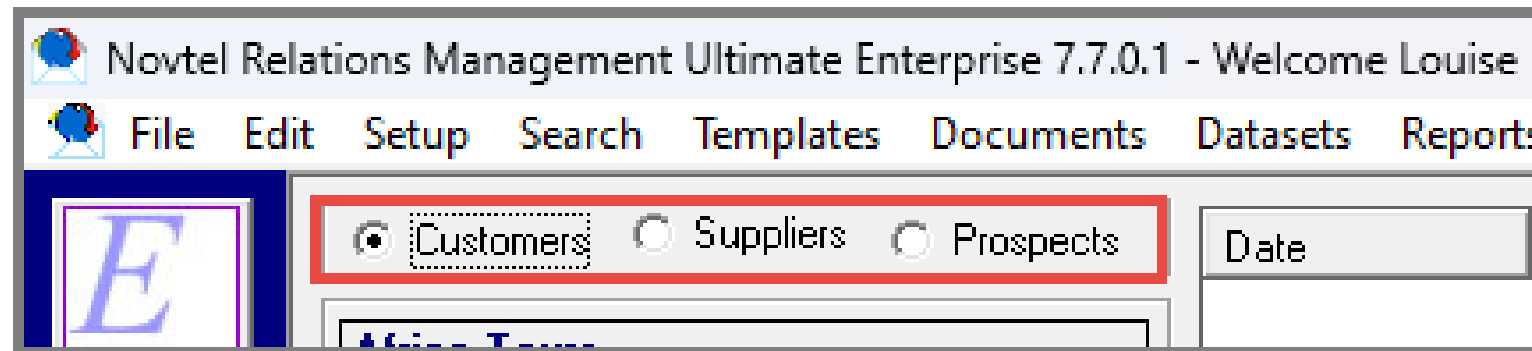
2

Customer, Supplier and Prospect Accounts

Customer, Supplier and Prospect Accounts

In Novtel Relations Management, Customer, Supplier and Prospect master files are created and managed from the respective headings.

Reports for each can be obtained; communication actions performed and existing correspondence viewed.



Customer, Supplier and Prospect Accounts

Account master files are created and edited under the required heading of either Customers; Suppliers or Prospects:

Customers

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@...)

File Edit Setup Search Templates Documents Datasets Reports

Customers Suppliers Prospects

Andrews, Shawn

Category: Gold Membership

Account Status: Suspended

Account Progress: Contract Terminated

Rental Expiry Date: Evicted

Location1: CPT - Northern Suburbs

Location2: Durbanville

Flagged Stage:

Search: []

☒ Code Search ☐ Show u

☐ Email Search

☐ Inactive Only

Advanced Search Move

Desc

- Africa Tours
- Alberts Peter
- Alberts Tom
- Alberts Jenny
- Andrews, Shawn
- Anderson, Peter
- Anderson Richard
- Andrews, Gordon
- Anderson Hotel Group
- Bell Beverly
- Bonnitec
- Carstens Kevin
- Cash Sales
- Cash Sales
- Cash Sales

Customer Count : 66

Suppliers

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@...)

File Edit Setup Search Templates Documents Datasets Reports Hel

Customers Suppliers Prospects

Mossel Bay Municipality

Category: No Category

Account Type:

Account Status: None:

Location1:

Location2:

Flagged Stage:

Search: []

☒ Code Search ☐ Show u

☐ Email Search

☐ Inactive Only

Advanced Search Move

Desc

- AAA Pumbers
- Abbey Way Electrical
- Accolade Gardens
- Test
- Game Stores
- Great Vacation Club
- London, Peter
- Maintenance Department
- Mossel Bay Municipality
- Patterson, Kevin

Supplier Count : 7

Prospects

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@...)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

Malan, Liza

Category: Frail Care

Marketing Process:

Progress or Lack Thereof:

Action:

Location1:

Location2:

Flagged Stage:

Search: []

☒ Code Search ☐ Show u

☐ Email Search

☐ Inactive Only

Advanced Search Move

Desc

- Anderson, Andrew
- Fredericks, Paul
- Greeff, Janet
- Malan, Liza
- Pretorius, Koos
- Southport Medical Supplies
- Van der Merwe, Jan

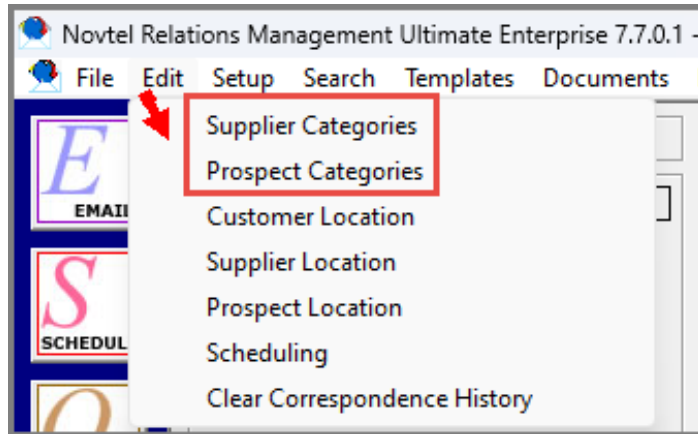
Prospect Count : 7

Customer, Supplier and Prospect Accounts

Each Account can be linked to a specific Category.

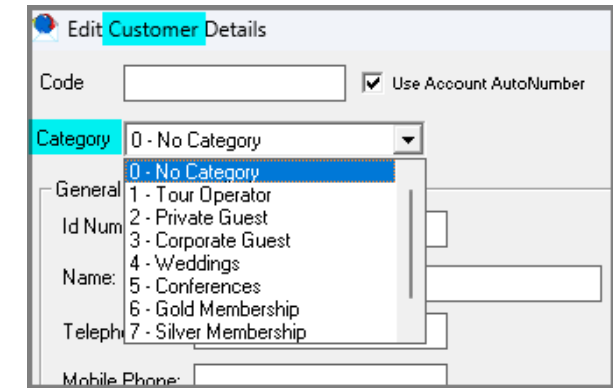
Customer Categories are set up in the linked financial system and will be available for selection in Novtel.

Supplier and Prospect Categories respectively are created in Novtel, and will be available on either the Supplier or Prospect Master File.

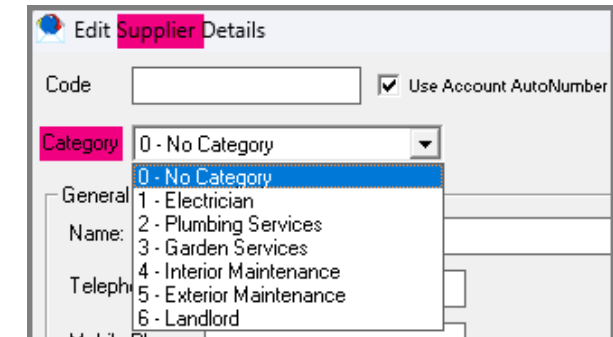


Advanced searches can be performed to group all accounts linked to the same category for the purpose of sending a bulk email and/or SMS to all accounts simultaneously.

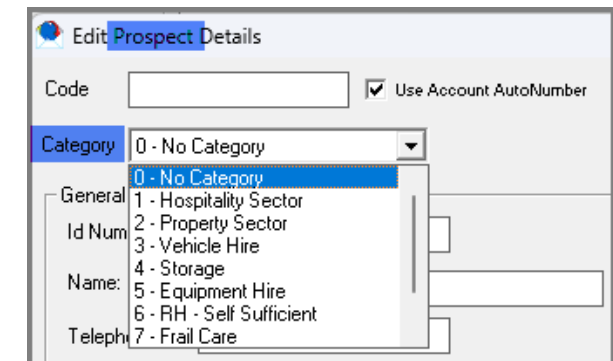
Customers



Suppliers



Prospects



Customer, Supplier and Prospect Accounts

Setup Company

Company Details | **General** | System

Display Select Range ☒

Selection Count

Display Select Status ☒

Use Location1 as Country and Location2 as City ☐

Location1 Custom Text:

Location2 Custom Text:

'Locations' can refer to either of the following – depending on how the system is set up:

- ✓ Countries and Cities
- ✓ Cities and Suburbs
- ✓ Or 'Locations' can be customized to reflect your required headings and customized entries.

Locations are set up for Customers, Suppliers and Prospects respectively, and will be available for selection on the corresponding accounts.

An advanced search can be performed to group all Customer, Supplier or Prospect Accounts linked to the same 'Location' together for the purpose of sending a bulk email and/or SMS.

Novtel Relations Management Ultimate Enterprise 7.7.0.1

File Edit Setup Search Templates Documents

Supplier Categories

Prospect Categories

Customer Location

Supplier Location

Prospect Location

Scheduling

Clear Correspondence History

Edit Customer Details

Code ☒ Use Account AutoNumber

Category

Location 1: Location 2:

Edit Supplier Details

Code ☒ Use Account AutoNumber

Category

Location 1: Location 2:

Edit Prospect Details

Code ☒ Use Account AutoNumber

Category

Location 1: Location 2:

Customer, Supplier and Prospect Accounts

1. General Information per Account includes:

- ID Number (Customer and Prospect Accounts ONLY)
- The Account Name
- Telephone and Mobile Numbers
- Email Address
- Website
- Fax Number
- The date upon which contact was first established (Customer and Prospect Accounts ONLY)

2. The physical address is captured per account.

3. And the 'GPS Coordinates' can be entered if required.

Edit Customer Details

Code: AND005 ☒ Use Account AutoNumber

Category: 9 - Hospitality Sector Location 1: 3 - CPT - Atlantic Seaboard Location 2: 16 - Camps Bay

General Information

Id Number:

Name: Anderson Hotel Group

Telephone: 021 74147

Mobile Phone: 082 65412

Email Address: anderson@hotelgroup.com

Website: >>

Fax:

First Contact: 2025/02/17

Address

Address: Anderson Building
Office 12
Camps Bay
8001

Coordinates: View

Email / Sms Options

☐ Company Only
☐ Contact Persons Only

Edit Supplier Details

Code: SEA001 ☒ Use Account AutoNumber

Category: 1 - Electrician Location 1: 1 - CPT - Northern Suburbs Location 2: 11 - Durbanville

General Information

Name: Seabreeze Electrical Services

Telephone: 021 4441112

Mobile Phone: 084 1144771

Email Address: seabreeze@electric.co.za

Website: www.seaelecser.co.za >>

Fax:

☐ Contact persons with company

Address

Address: 78 Green Street
Durbanville
8000

Coordinates: View

Email / Sms Options

☒ Company Only

Edit Prospect Details

Code: SMS001 ☒ Use Account AutoNumber

Category: 5 - Equipment Hire Location 1: 1 - Custom Type Option 1 Location 2: 10 - Test Description 6

General Information

Id Number:

Name: Southport Medical Supplies

Telephone: 021 123654

Mobile Phone: 081 123654

Email Address: Southport@medicalSupplies.com

Website: >>

Fax:

First Contact: 2023/03/06

Address

Address: 95 Blue Street
Constantia
Cape Town
8000

Coordinates: View

Email / Sms Options

☒ Company Only
☐ Contact Persons Only

Customer, Supplier and Prospect Accounts

Edit Customer Details

Code: ☒ Use Account AutoNumber

Category:

General Information

Id Number:

Name:

Telephone:

Mobile Phone:

Email Address:

Website: >>

Fax:

First Contact:

☒ Contact persons with company

☐ Company Activities

☐ Inactive

Additional Information for AND005 - Anderson Hotel Group

First Name:

Last Name:

Contact Person:

Id Number:

Email Address:

Cell:

Telephone:

Fax:

Address:

Position:

Remarks:

☐ Default

Send Email	Description	Id Number	Email	Cell
☒ Yes	Frank Anderson		frankanderson@hotelgr...	082445566
☒ Yes	Theresa Anderson		theresaanderson@hote...	084112233

Contact Persons with Company

Multiple Contact Persons can be added to an Account by clicking on the 'Contact Persons with Company' button.

Edit Supplier Details

Code: ☒ Use Account AutoNumber

Category:

General Information

Name:

Telephone:

Mobile Phone:

Email Address:

Website: >>

Fax:

☒ Contact persons with company

☐ Company Activities

☐ Inactive

Edit Prospect Details

Code: ☒ Use Account AutoNumber

Category:

General Information

Id Number:

Name:

Telephone:

Mobile Phone:

Email Address:

Website: >>

Fax:

First Contact:

☒ Contact persons with company

☐ Company Activities

☐ Inactive

Customer, Supplier and Prospect Accounts

Address:
Address: 78 Green Street
Durbanville
8000
Coordinates: View

Email / Sms Options

1 ☒ Company Only
2 ☐ Contact Persons Only
3 ☐ Company and Contact Persons

In the 'Email / SMS Options' section, 1 of 3 options can be selected:

1. Company Only

By selecting this option, an email and / or SMS will be sent to the email address and / or mobile number captured on the main screen only.

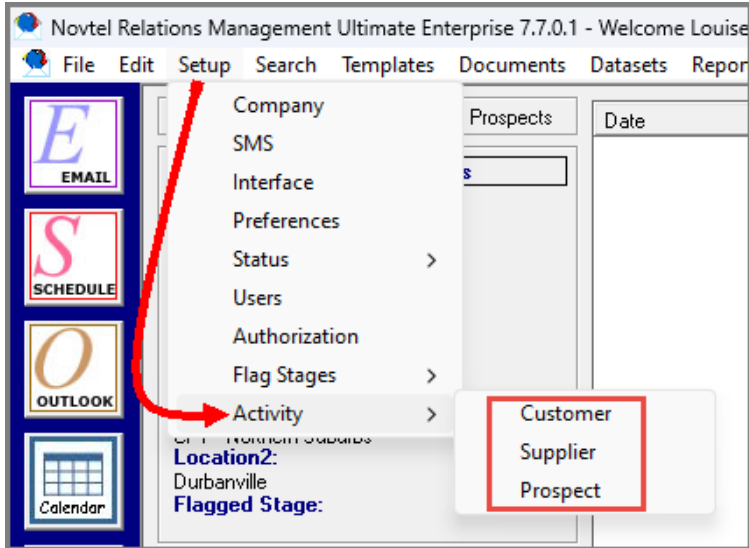
2. Contact Persons Only

Selecting this option, SMS and Email communications will be sent to contact persons linked to the company only, and not to the Company mobile number or email address.

3. Company and Contact Persons

Selecting this option, Email and SMS communications will be sent to both the Email address and / or SMS numbers of the Company and all listed Contact Persons.

Customer, Supplier and Prospect Accounts



‘Activities’ can be created according to the type of business a Customer; Supplier or Prospect is associated with.

The specific option or options can then be linked to the respective accounts directly on the Customer, Supplier or Prospect Master File.

The User will be able to filter Activities or Sub-Activities by means of an advanced search, to send a bulk email or SMS to accounts linked to the same search criteria, simultaneously.

On the Account, click on the ‘Company Activities’ option.

This action opens the ‘Select Activities’ window, displaying pre-created Activities and Sub-Activities.

Edit Customer Details

Code: AND005 ☒ Use Account AutoNumber

Category: 9 - Hospitality Sector Location 1: 3 - CPT - Atlantic Seaboard Location 2:

General Information

Id Number:

Name: Anderson Hotel Group

Telephone: 021 74147

Mobile Phone: 082 65412

Email Address: anderson@hotelgroup.com

Website:

Fax:

First Contact: 2025/02/17

☐ Contact persons with company

☒ Company Activities

☐ Inactive

Select Activities

Main Activity	Sub Activity	Selection
Hospitality Sector	Accommodation and Restaurant	☒
	Accommodation Only	☒
	All-in-one	☒
	Conference Facilities	☒
	Restaurant Only	☒
	Wedding Venue	☒
Property Sector	Body Corporate	☐
	Industrial Rentals	☐
	Property Development	☐
	Social Housing	☐

Cancel Save

Edit Supplier Details

Code: SEA001 ☒ Use Account AutoNumber

Category: 1 - Electrician

General Information

Name: Seabreeze Electrical Services

Telephone: 021 4441112

Mobile Phone: 084 1144771

Email Address: seabreeze@electric.com

Website: www.seaelecser.co.za >>

Fax:

☐ Contact persons with company

☒ Company Activities

☐ Inactive

Edit Prospect Details

Code: SMS001 ☒ Use Account AutoNumber

Category: 5 - Equipment Hire

General Information

Id Number:

Name: Southport Medical Supplies

Telephone: 021 123654

Mobile Phone: 081 123654

Email Address: Southport@medicalSupplies.com

Website: >>

Fax:

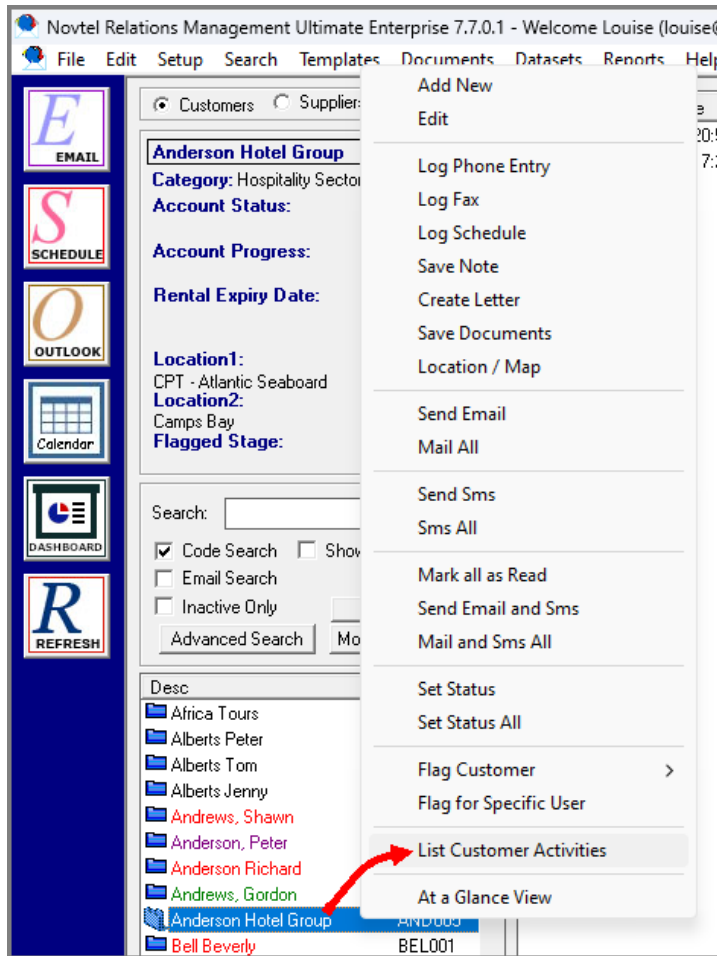
First Contact: 2023/03/06

☐ Contact persons with company

☒ Company Activities

☐ Inactive

Customer, Supplier and Prospect Accounts



To obtain a list of Activities and Sub-Activities an Account is linked to without opening the Master File, right-click on the Account and select 'List Customer / Supplier / Prospect Activities'.

Only the Sub-Activities selected under the Main Activity will be displayed in this window.



Advanced Searches can be performed to Group all Customer / Supplier / Prospect Accounts together for the purpose of sending a bulk email and/or SMS to all accounts simultaneously.



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Relations Management

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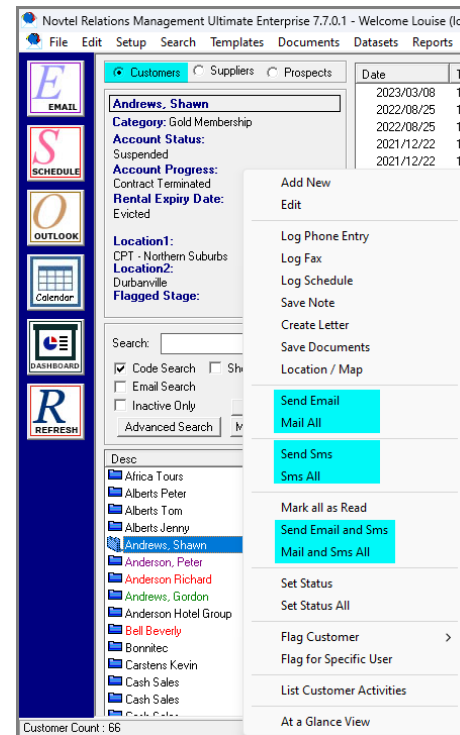
Email and/or SMS Communication

Email and/or SMS Communication

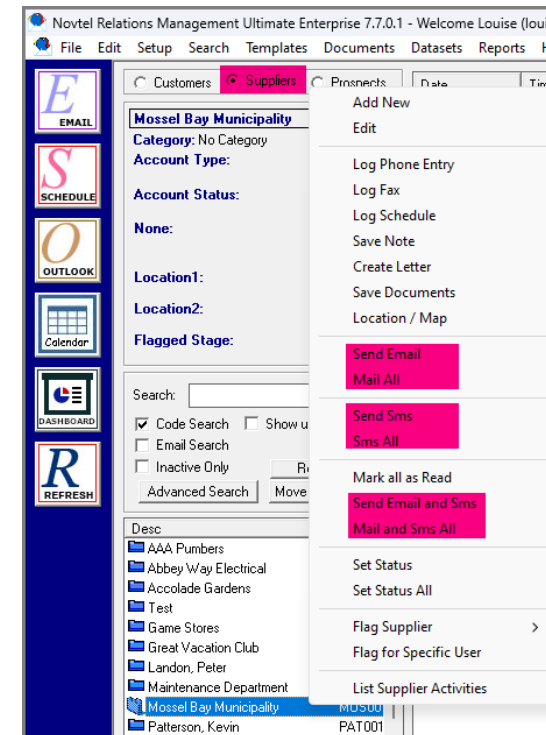
Customers

The following Communication actions can be performed on all Customer, Supplier and Prospect accounts:

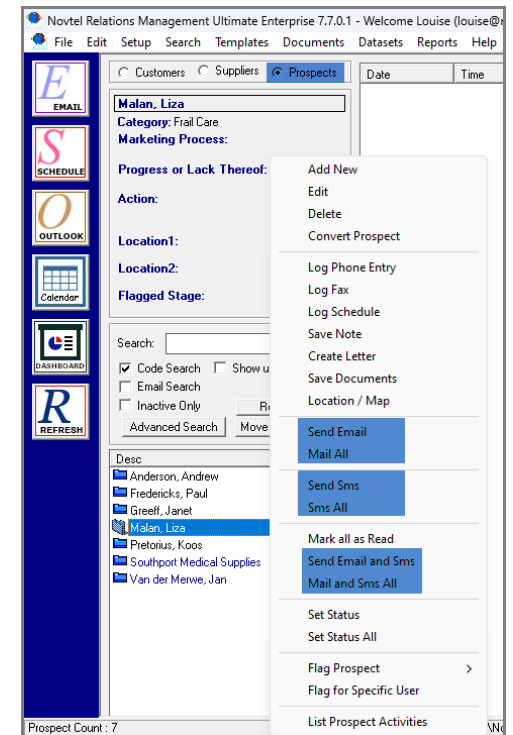
- ✓ Email a Single Account;
- ✓ Email All Accounts listed;
- ✓ SMS a Single Account;
- ✓ SMS All Accounts Listed;
- ✓ Email and SMS a Single Account;
- ✓ Email and SMS All Accounts listed.



Suppliers



Prospects



Email and/or SMS Communication

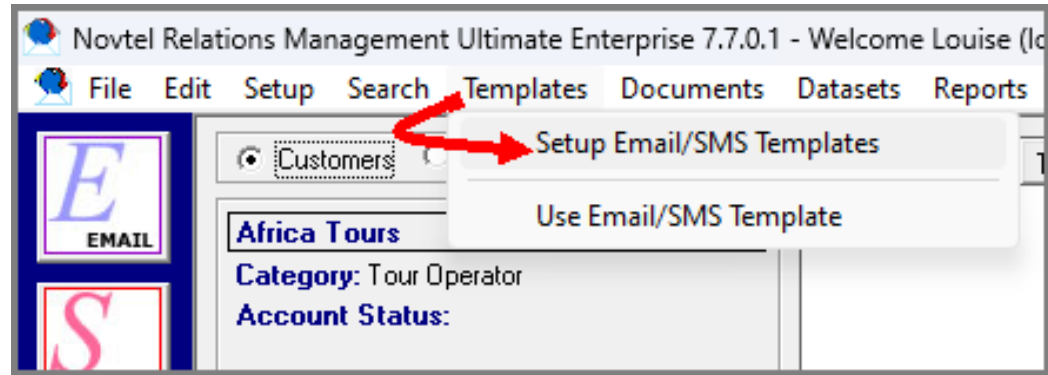
In Novtel Relations Management, an unlimited number of email and SMS templates can be created. The required template can be selected when sending standard communication to Customers; Suppliers or Prospects.

When activated, 'Merged Fields' can be selected to derive information from Novtel.

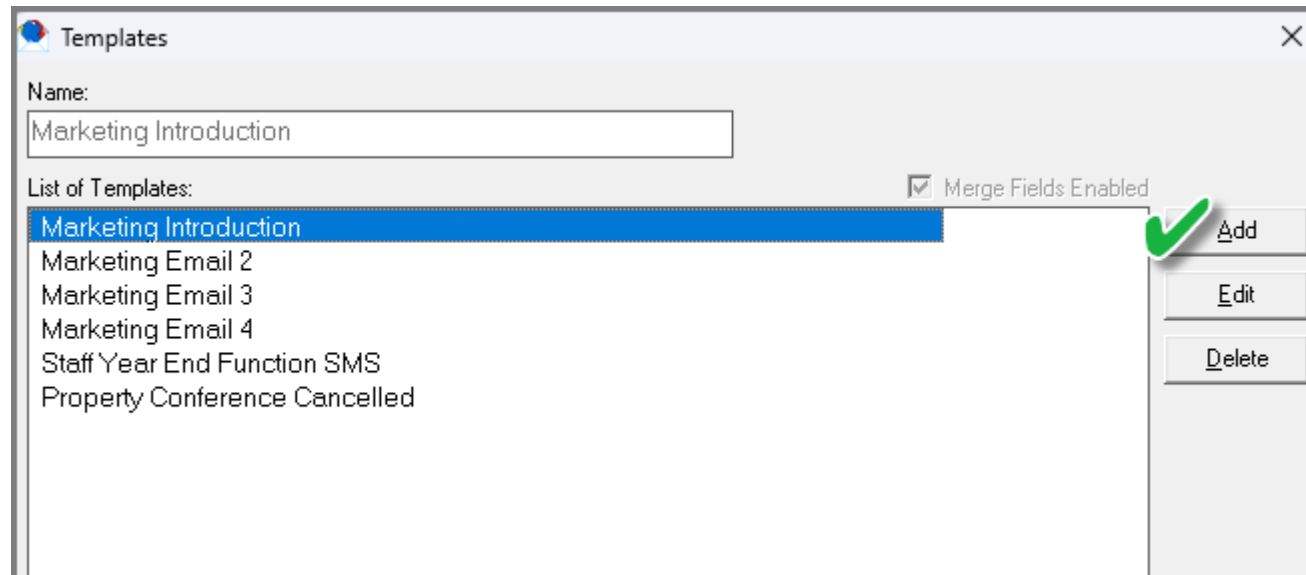
At present, the following can be selected to display customized information per Template:

- ✓ ID Number
- ✓ Description
- ✓ Telephone Number
- ✓ Mobile Number
- ✓ Fax
- ✓ Email
- ✓ Address lines 1-5
- ✓ The default Contact as selected on the 'Additional Information' screen of a Customer; Supplier or Prospect Master File

Email and/or SMS Communication

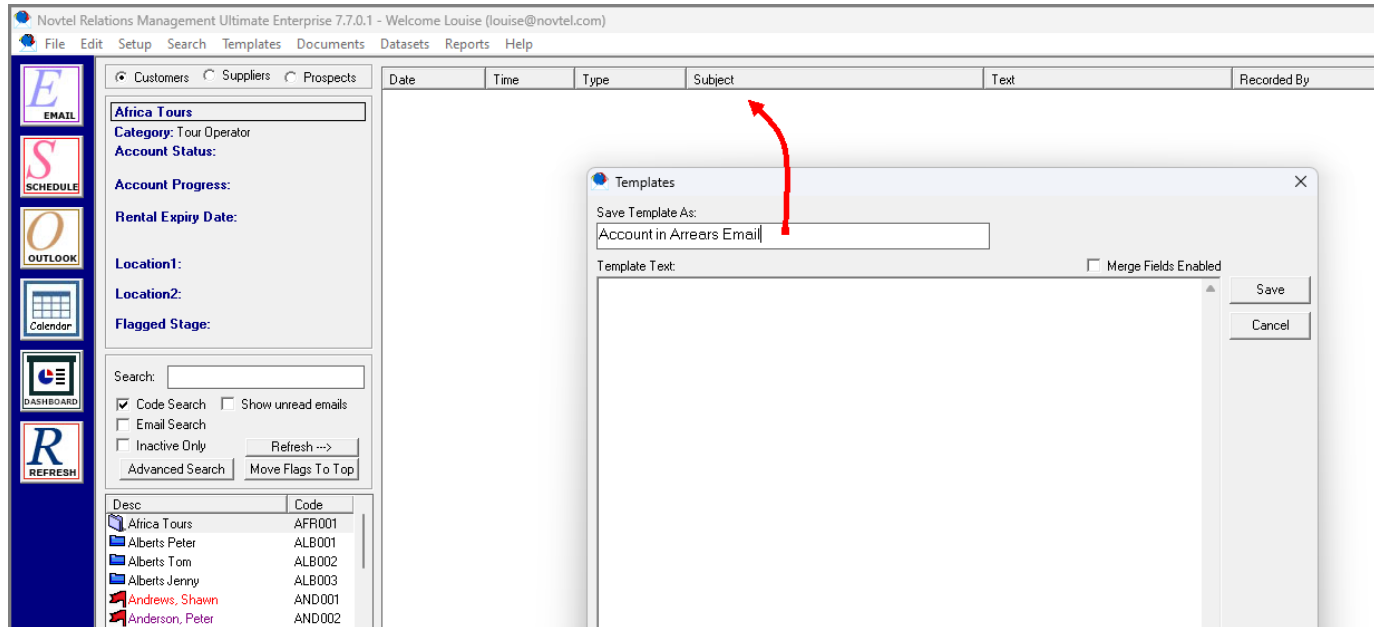


To create Email and / or SMS templates, click on the 'Templates' menu option and select 'Setup – Email/SMS Templates'.



The 'Templates' window will now be displayed and to create a new Template, click 'Add'.

Email and/or SMS Communication



Enter a unique name for this template which will easily be distinguishable when searching for the applicable template in order to use it when sending either an Email or SMS.

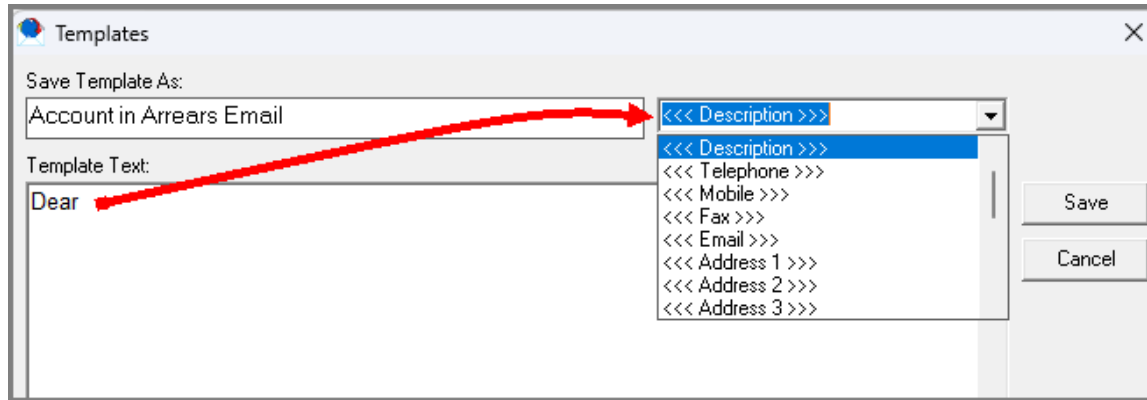
This description will also automatically be displayed as the Email or SMS Subject when sent.



To activate the option to insert customized information for each selected Customer; Supplier or Prospect when sending an Email or SMS using a Template, tick the 'Merge Fields Enabled' checkbox.

This immediately activates the field from where specific options can be selected to insert on the Template.

Email and/or SMS Communication



Templates

Save Template As:
Account in Arrears Email

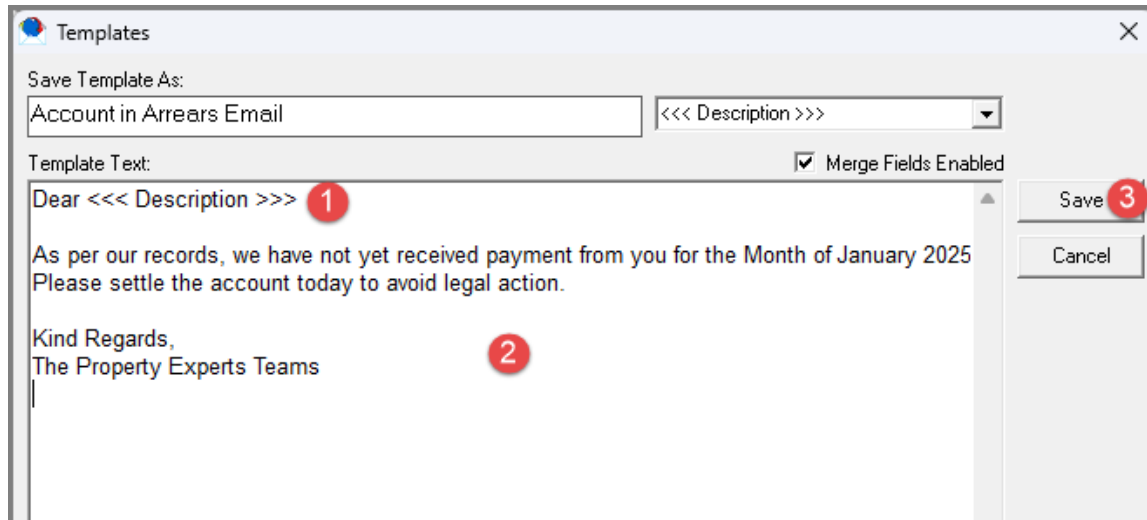
Template Text:
Dear

Merged Fields:
<<< Description >>>
<<< Telephone >>>
<<< Mobile >>>
<<< Fax >>>
<<< Email >>>
<<< Address 1 >>>
<<< Address 2 >>>
<<< Address 3 >>>

Save
Cancel

Next, the standard wording can be added to the 'Template Text' section.

In this case, we will first enter the wording 'Dear' and then select the <<<Description>>> option from the Merged Fields menu.



Templates

Save Template As:
Account in Arrears Email

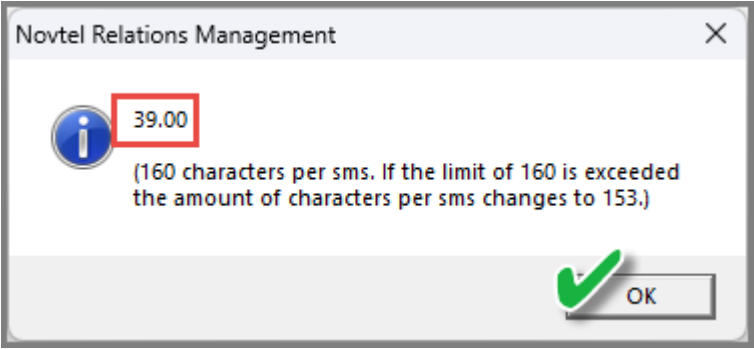
Template Text:
Dear <<< Description >>> 1
As per our records, we have not yet received payment from you for the Month of January 2025
Please settle the account today to avoid legal action.
Kind Regards,
The Property Experts Teams 2

Merge Fields Enabled

Save 3
Cancel

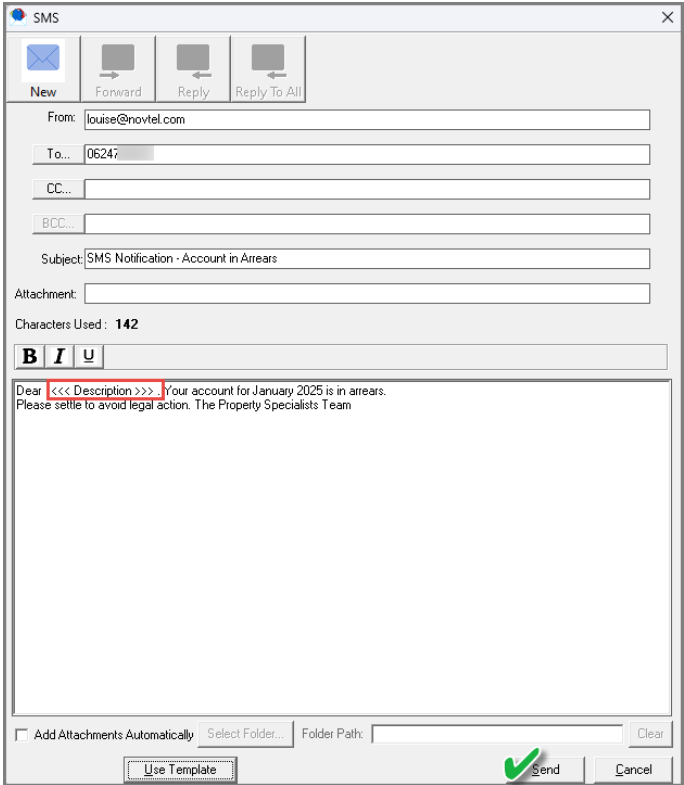
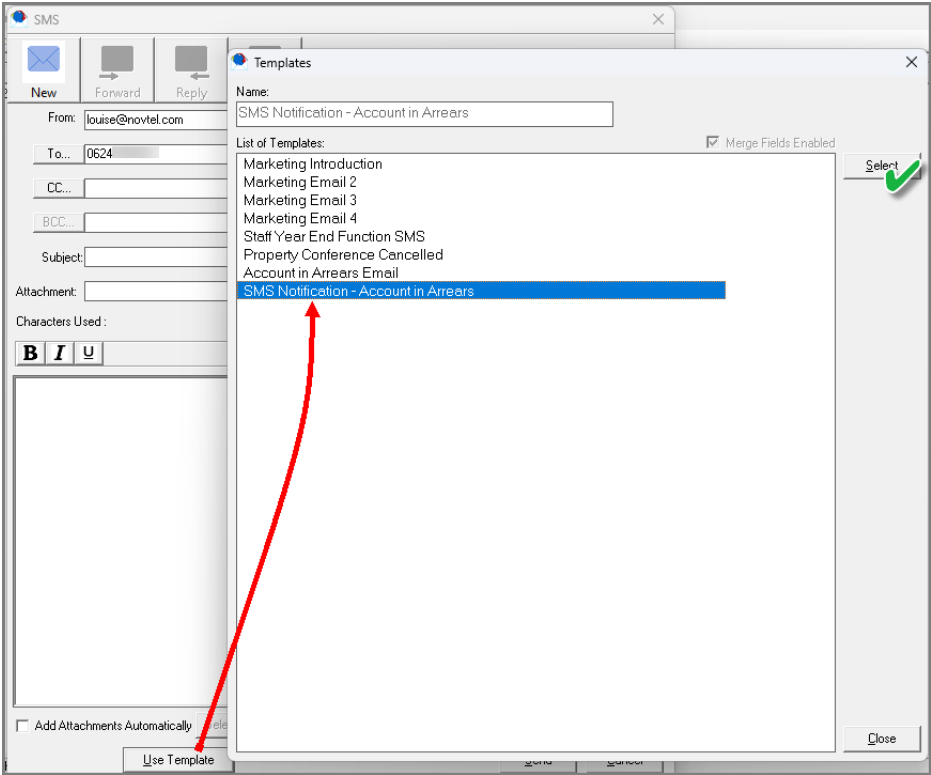
1. This merged option is now inserted here.
2. The rest of the 'Template Text' can be added and if needed, other 'Merged Fields' can also be entered if required.
3. Clicking 'Save', the Template has been created successfully.

Email and/or SMS Communication



SMS Credits can be obtained from Novtel, and SMS communications will also be saved per account.

SMS Templates can be set up and used when sending a generic SMS to a single, or multiple accounts.



Email and/or SMS Communication

After sending the SMS and accessing it, it is displayed as follows in Novtel, and the SMS will be sent to the selected account's mobile number.

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

Alberts Peter
Category: Gold Membership
Account Status: Newly Added
Account Progress:
Rental Expiry Date:
Location1: CPT - Northern Suburbs
Location2: Bellville
Flagged Stage:

Search:
☒ Code Search ☐ Show unread emails
☐ Email Search
☐ Inactive Only
Refresh -->
Advanced Search Move Flags To Top

Desc Code

Africa Tours	AFR001
Alberts Peter	ALB001
Alberts Tom	ALB002
Alberts Jenny	ALB003
Andrews, Shawn	AND001
Anderson, Peter	AND002
Anderson Richard	AND003

Date	Time	Type	Subject	Text	Recorded
2025/02/13	10:54:03	Sms	SMS Notification - Account in Arrears		Louise
2025/02/13	09:18:10	Email Out	Account in Arrears Email		Louise

SMS

New Forward Reply Reply To All

From: louise@novtel.com

To: 0624

CC:

BCC:

Subject: SMS Notification - Account in Arrears

Attachment:

Characters Used : 136

B I U

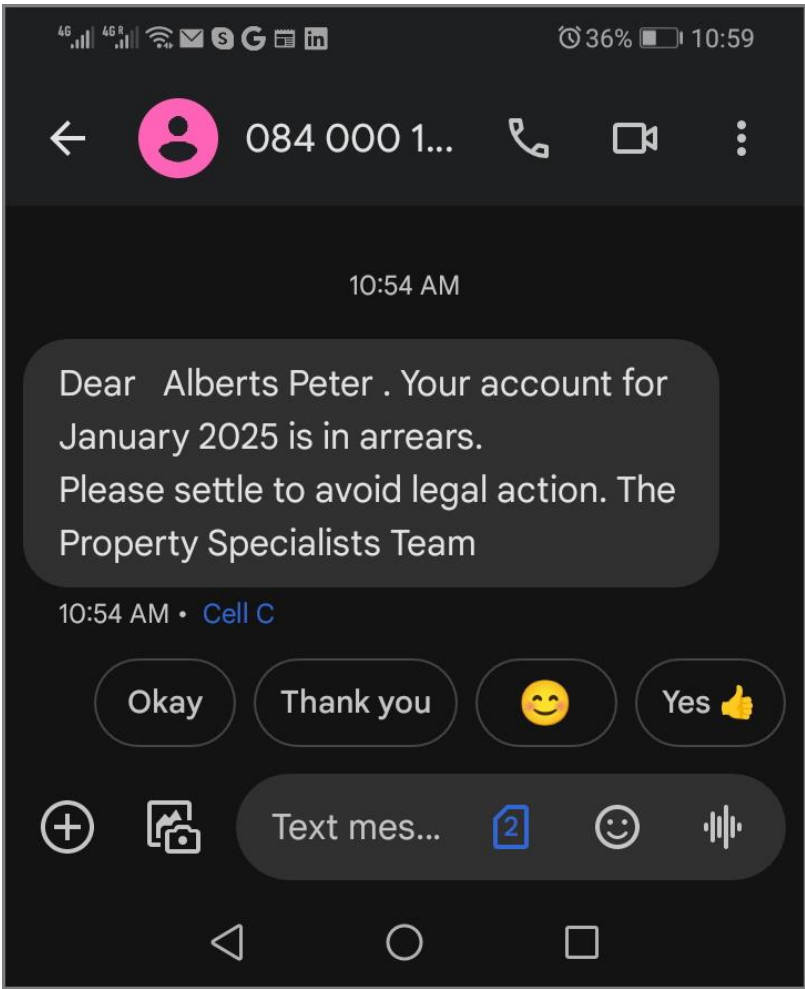
Dear **Alberts Peter**. Your account for January 2025 is in arrears.
Please settle to avoid legal action. The Property Specialists Team

C:\Users\Louise\AppData\Local\Temp\TempReport.html

List of Outgoing Email / SMS

Date and time report was printed: 13/02/2025 10:54:03 am

Code	Description	Email	Cell	Person Type	SMS Status Message
ALB001	Alberts Peter		0624	Customer	SMS Sent Successfully.



Email and/or SMS Communication

All Emails between your company and its Customers, Supplier and Prospects will be saved to the corresponding accounts.

The screenshot displays the Novtel Relations Management Ultimate Enterprise 7.7.0.1 interface. The window title is "Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)". The menu bar includes File, Edit, Setup, Search, Templates, Documents, Datasets, Reports, and Help. The left sidebar contains icons for EMAIL, SCHEDULE, OUTLOOK, Calendar, DASHBOARD, and REFRESH. The main area shows a list of email communications for the "Anderson Hotel Group" account. A red box highlights the "Type" column, which contains "Email Out" for two entries. A blue text box explains that emails sent from Novtel are displayed as "Email Out". A green text box explains that emails imported from Outlook are displayed as "Email In".

Date	Time	Type	Subject	Text	Recorded By	Requested By
2025/02/17	12:20:53	Email Out	Novtel Manual Attached		Louise	
2025/02/17	12:17:25	Email Out	Novtel Manual Attached		Louise	

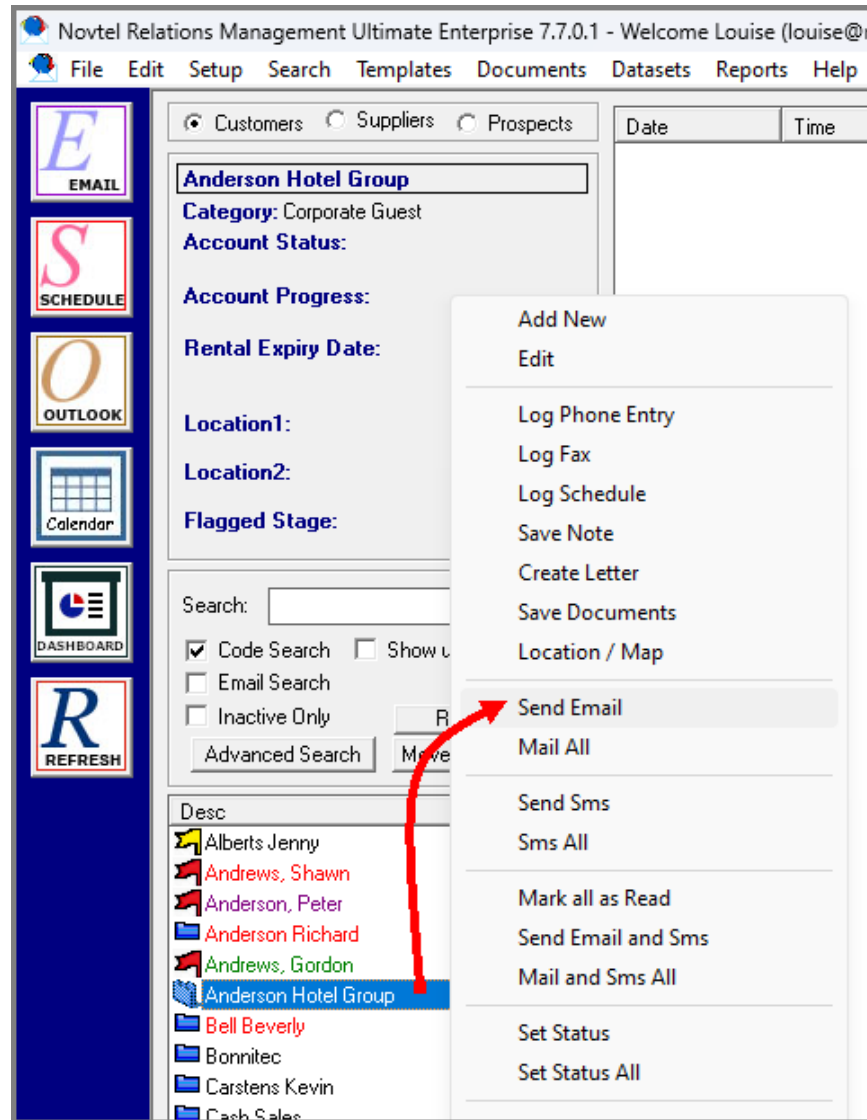
Anderson Hotel Group
Category: Corporate Guest
Account Status:
Account Progress:
Rental Expiry Date:
Location1:
Location2:
Flagged Stage:

Search:
☒ Code Search ☐ Show unread emails
☐ Email Search
☐ Inactive Only

Desc	Code
Africa Tours	AFR001
Alberts Peter	ALB001
Alberts Tom	ALB002
Alberts Jenny	ALB003
Andrews, Shawn	AND001
Anderson, Peter	AND002
Anderson Richard	AND003
Andrews, Gordon	AND004
Anderson Hotel Group	AND005
Bell Beverly	BEL001
Bonnitec	BON001
Carstens Kevin	CAR001
Cash Sales	CAS001
Cash Sales	CAS002
Cash Sales	CAS003

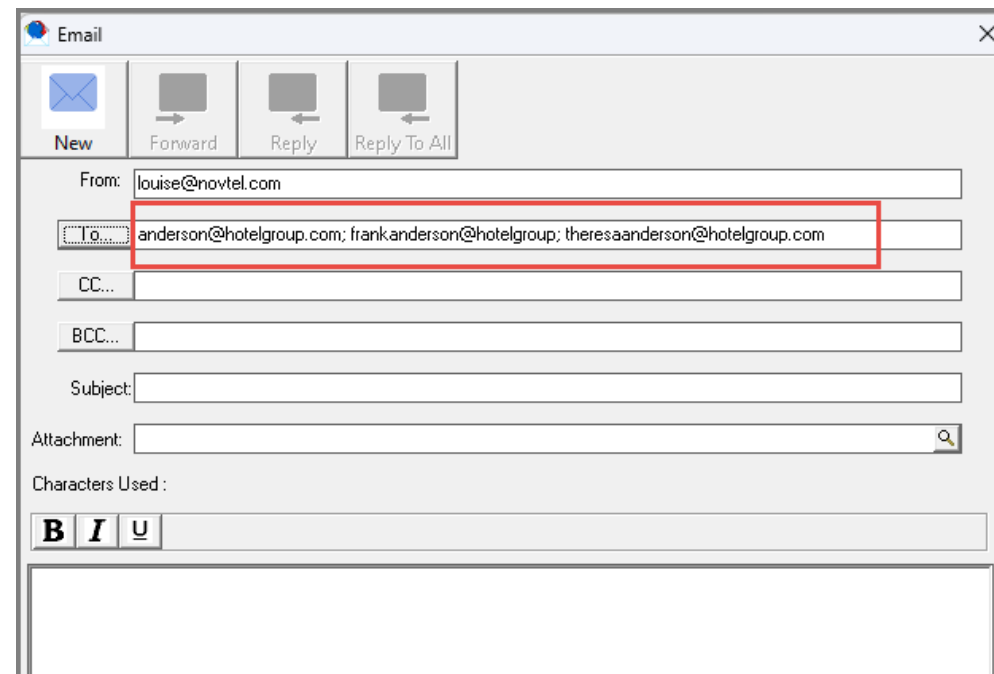
Customer Count : 66 Relations DB Path: C:\Users\Louise\NovtelData\Relations\Basic Manual.mdb Pastel Path : C:\Pastel18\PASTEL

Email and/or SMS Communication



By right clicking on a specific account and selecting 'Send Email', the email address captured on the account master file will be added to the 'To' field automatically.

If the Company and Contact Persons option is selected on the Account master file, the contact persons with the company's email addresses will be inserted.



Email and/or SMS Communication

If required, an email address can be removed from the Email screen to exclude it.

An existing email address can be added to the email communication, and can be 'cc'd' or 'bcc'd'.

An email address not currently in the address book, can be included too if required.



The screenshot shows a form for adding an email address. It has two input fields: 'Email :' containing 'louise@novtel.com' and 'Cell :'. Below these are three radio buttons labeled 'To', 'CC', and 'BCC'. The 'BCC' radio button is selected and highlighted with a dashed border. A red arrow points from the 'Email' field to the 'BCC' button. At the bottom, there is a green checkmark icon, an 'Add' button, and a 'Cancel' button.

Email and/or SMS Communication

Email

New Forward Reply Reply To All

From: louise@novtel.com

To: kevin@carstens.co.za

CC:

BCC:

Subject:

Attachment:

Characters Used :

B **I** **U**

☐ Add Attachments Automatically Select Folder... Folder Path: Clear

Use Template Display / Remove Attachment Send Cancel

In the 'Email' window, click on the 'Use Template' button.

The required pre-created Template can now be searched for and selected.

Templates

Name: Happy Birthday!

List of Templates: ☒ Merge Fields Enabled

Marketing Introduction
Marketing Email 2
Marketing Email 3
Staff Year End Function SMS
Property Conference Cancelled
Account in Arrears Email
SMS Notification - Account in Arrears
Financial Statistics
Happy Birthday!

Select

Email and/or SMS Communication

The screenshot shows an email composition window titled "Email". At the top, there are icons for "New", "Forward", "Reply", and "Reply To All". Below these are fields for "From:" (louise@novtel.com), "To:" (kevin@carstens.co.za), "CC:", and "BCC:". The "Subject:" field contains "Happy Birthday!" and is marked with a red circle 1. Below the subject field is an "Attachment:" field with a search icon, marked with a red circle 3. Underneath is a "Characters Used : 223" label. A formatting bar with "B", "I", and "U" buttons is present. The main text area contains a greeting "Dear <<< Description >>>" marked with a red circle 2, followed by a birthday message and a signature. At the bottom, there is a checkbox for "Add Attachments Automatically", a "Select Folder..." button, a "Folder Path:" field, and a "Clear" button. The bottom-most row contains a "Use Template" button, a "Display / Remove Attachment" button, a "Send" button marked with a red circle 4, and a "Cancel" button.

1. The Template's name is automatically inserted as the 'Subject'.
2. The message is displayed as entered. At present, the 'Merged Field' is displayed as <<<Description>>>, but when the email is sent, the Account Description will be entered for a personalized message.
3. If you would like to attach a digital birthday card or document, it can be done by clicking on the search option in the 'Attachment' field, and searching and selecting the item from the stored location on the PC.
4. Clicking 'Send', the email is sent to the email address linked to the account.

Email and/or SMS Communication

The screenshot shows an email composition window titled 'Email'. It includes fields for 'From' (louise@novtel.com), 'To' (kevin@carstens.co.za), 'CC', 'BCC', and 'Subject' (Happy Birthday!). There are buttons for 'New', 'Forward', 'Reply', and 'Reply To All'. Below the fields, it shows 'Attachment:', 'Characters Used: 223', and text formatting buttons (B, I, U). The email body starts with 'Dear <<< Description >>>' and ends with 'Birthday Regards, Mike Westford CEO'. An 'Alter Status' dialog box is open in the foreground, containing three dropdown menus: 'Account Status' (set to '--No Change--'), 'Account Progress' (set to '--No Change--'), and 'Rental Expiry Date' (set to '--No Change--'). The dialog has 'Accept' and 'Cancel' buttons. At the bottom of the email window, there are checkboxes for 'Add Attachments Automatically', a 'Select Folder...' button, a 'Folder Path:' field, and buttons for 'Use Template', 'Display / Remove Attachment', 'Send', and 'Cancel'.

If required, the statuses can be amended and saved.

If activated, the 'List of Outgoing Email / SMS' report will be generated in your browser.

List of Outgoing Email / SMS

Date and time report was printed: 18/02/2025 08:34:03 am

Code	Description	Email	Cell	Person Type	SMS Status Message
CAR001	Carstens Kevin	kevin@carstens.co.za		Customer	

Email and/or SMS Communication

The screenshot displays the Novtel Relations Management Ultimate Enterprise 7.7.0.1 interface. The top menu bar includes File, Edit, Setup, Search, Templates, Documents, Datasets, Reports, and Help. The left sidebar contains icons for EMAIL, SCHEDULE, OUTLOOK, Calendar, DASHBOARD, and REFRESH. The main window is divided into several sections:

- Customers Section:** Displays details for Carstens Kevin, including Category (Bronze Membership), Account Status (Newly Added), Account Progress, Rental Expiry Date, Location1, Location2 (Bantry Bay), and Flagged Stage.
- Search Section:** Includes a search bar and checkboxes for Code Search, Email Search, and Inactive Only. A red arrow points from the 'Carstens Kevin' entry in the list below to the 'Date' field in the communication table.
- Communication Table:** A table with columns Date, Time, Type, Subject, and Text. It shows a single entry for 2025/02/18 at 08:34:03, Type 'Email Out', Subject 'Happy Birthday!', and Text.
- Email Composition Window:** A pop-up window titled 'Email' showing the details of the email being sent. It includes fields for From (louise@novtel.com), To (kevin@carstens.co.za), CC, BCC, and Subject (Happy Birthday!). The text area contains a greeting 'Dear Carstens Kevin' and a birthday message from the Property Experts Team.

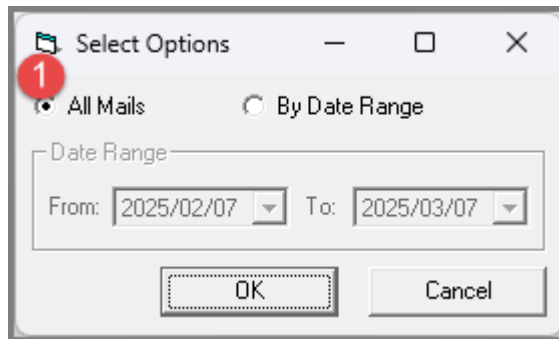
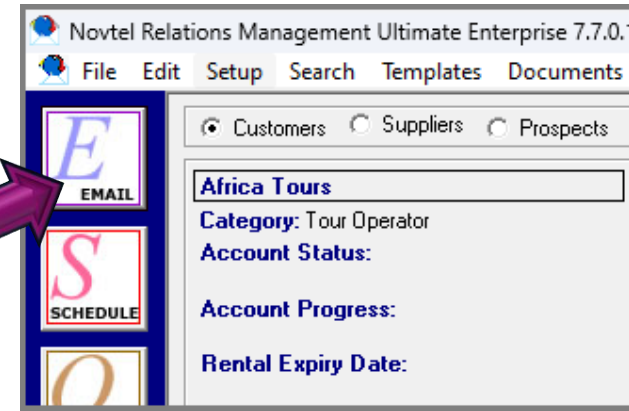
The email will now be captured to the account's communication screen, and can be accessed by double clicking on the communication.

Note that the account description is now displayed instead of the 'Merged Field' option, <<<Description>>>.

Email and/or SMS Communication

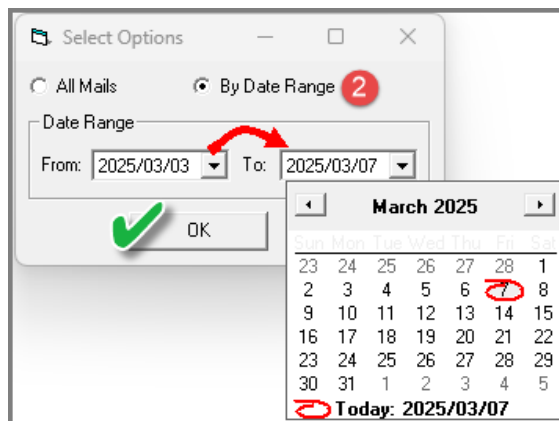
Emails can also be imported from Microsoft Outlook to Novtel, to keep all communication centralized.

Clicking on the 'Email' Icon, one of 2 options can be selected, namely:



1. All Emails

This option is selected by default, and all emails for the last month can be imported to Novtel.



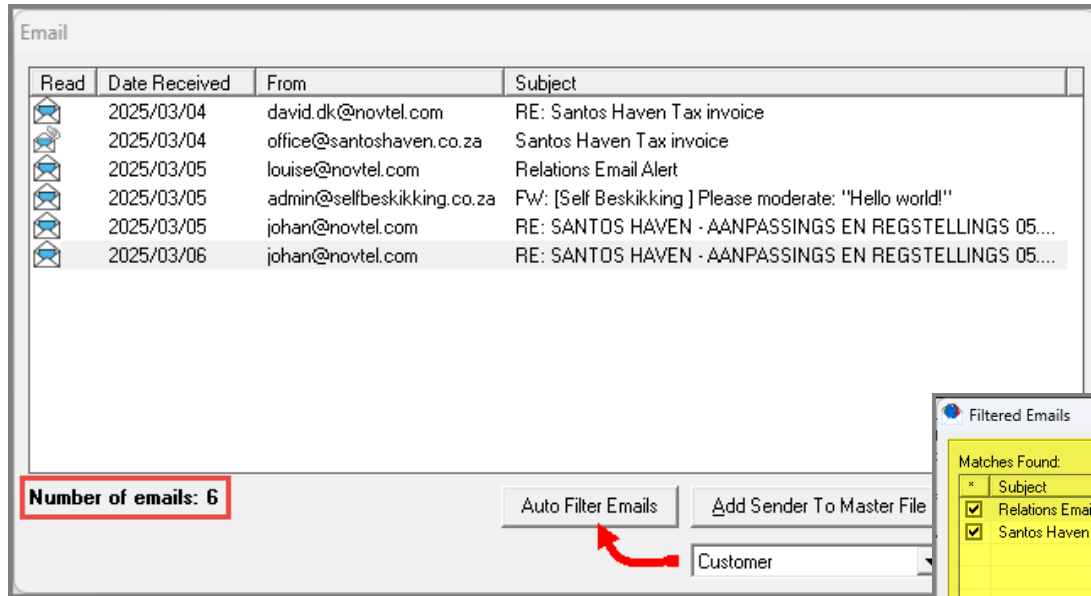
2. By Date Range

Selecting this option, you will be able to import emails for the required date range.

For example:

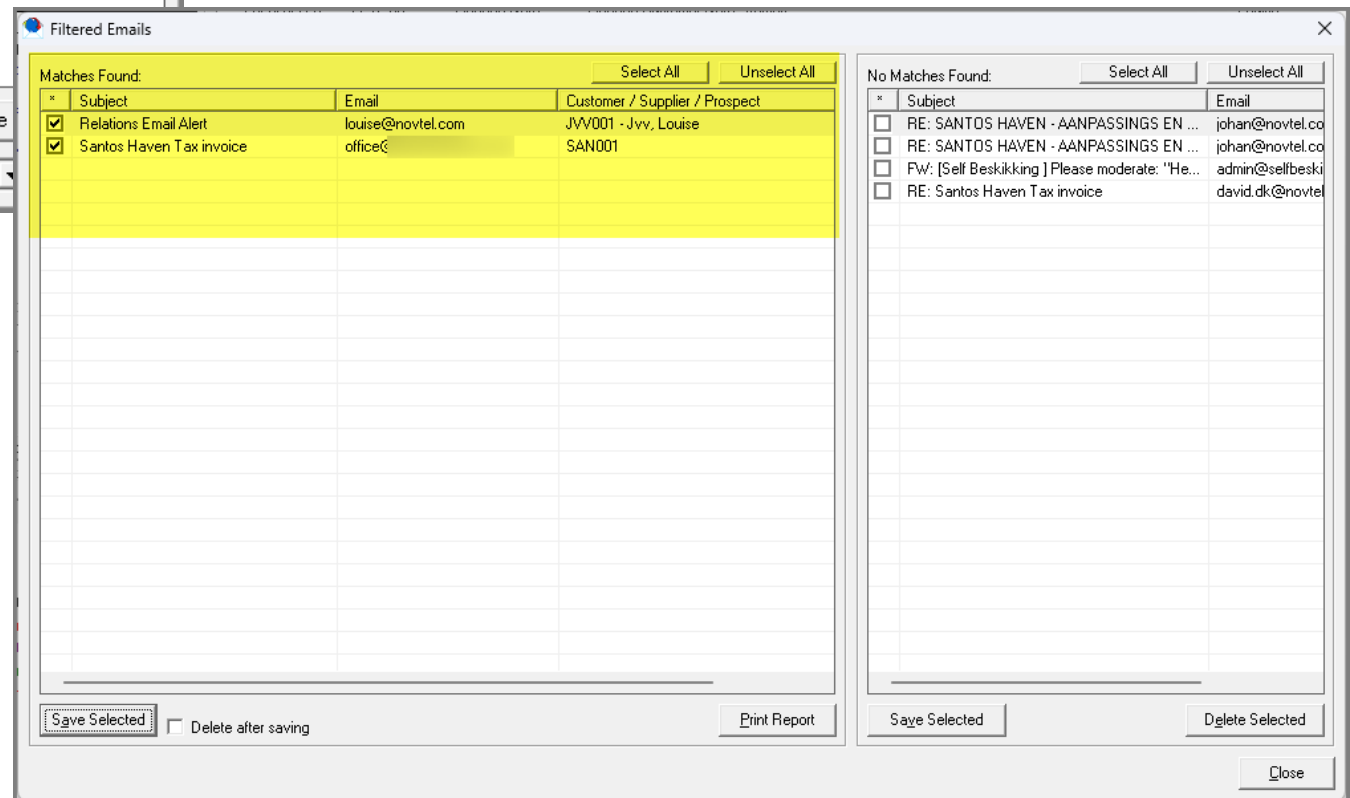
Emails received during the past 5 days only.

Email and/or SMS Communication

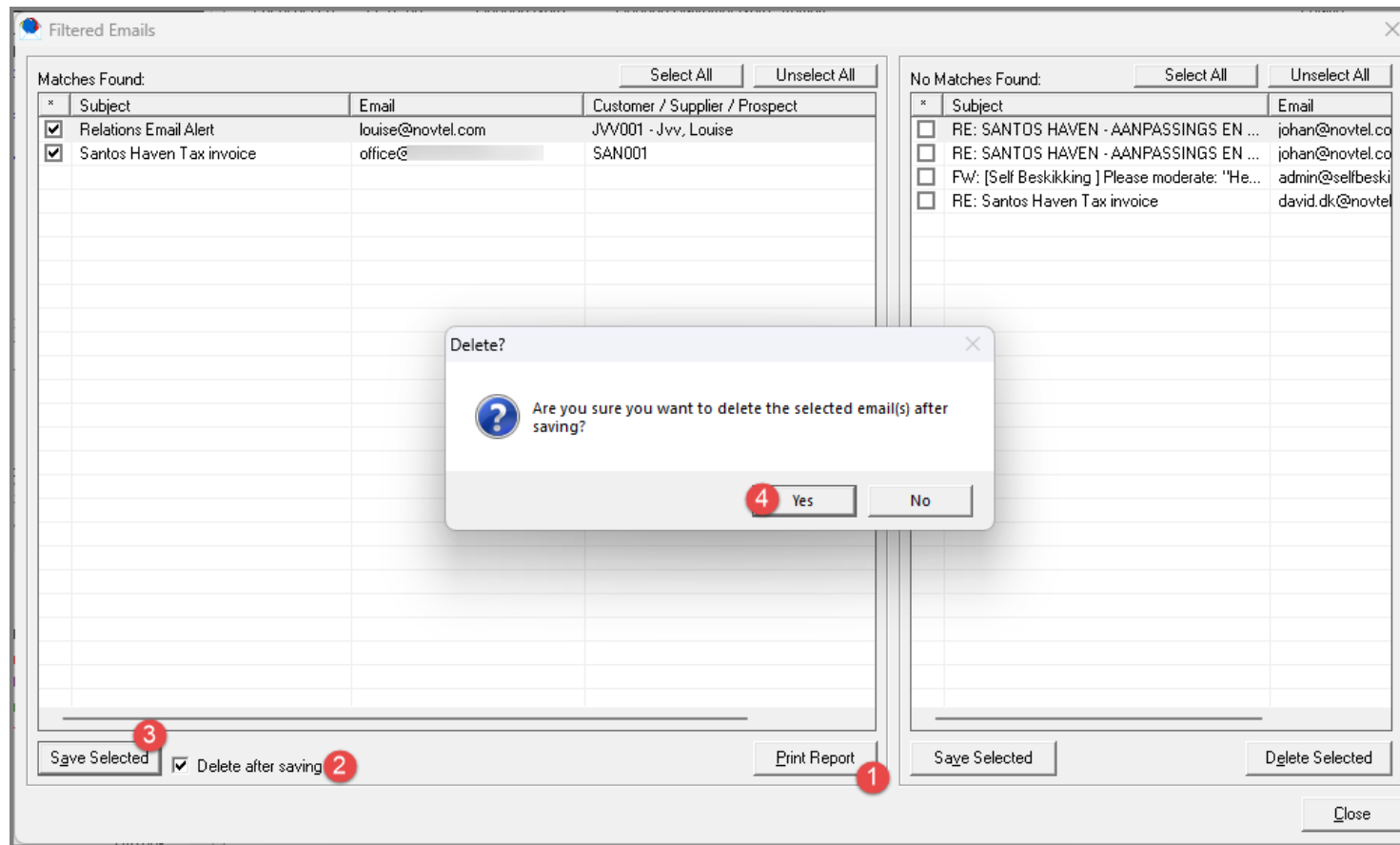


Only emails received within the selected period, will be displayed here, and will be imported to either the relevant **account** of the Customer, Supplier or Prospect Communications window.

Selecting the 'Auto Filter Emails' option, Novtel will indicate which email addresses have been matched to accounts (In the left-hand section of the window), and all options are selected by default.

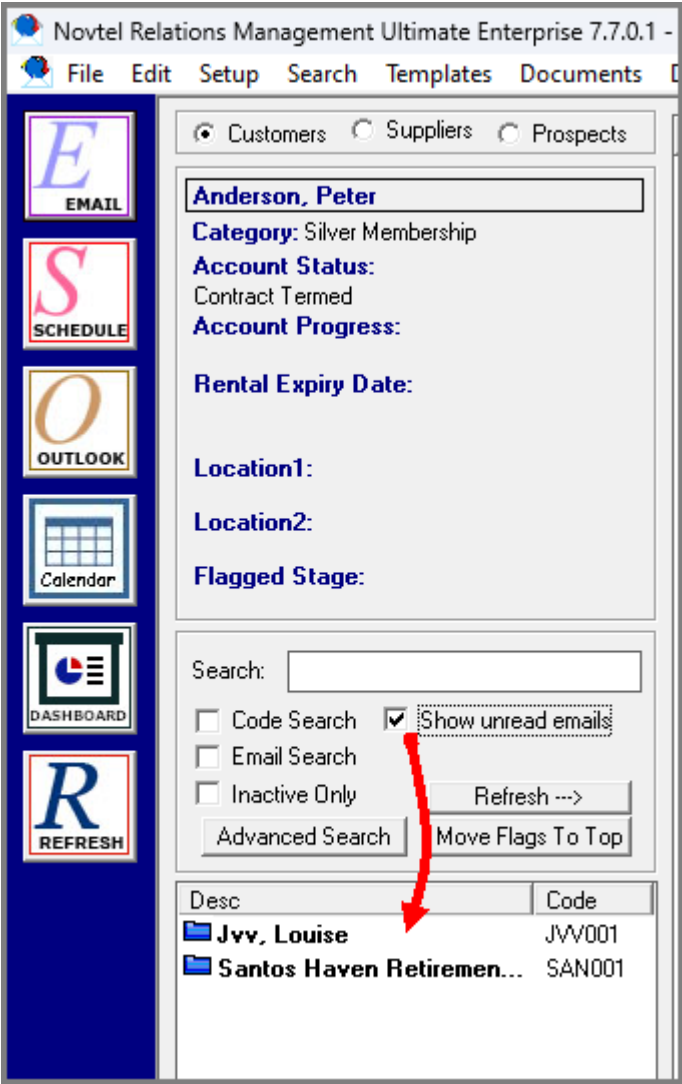


Email and/or SMS Communication



1. A Report can now be printed to list all email matches found, and whether it will be imported to a Customer, Supplier or Prospect Account.
2. If the emails are to be deleted from the email server and your Outlook Inbox, this option can be selected.
3. The emails can now be saved to Relations by clicking the 'Save Selected' button.
4. Novtel will wish to confirm the action of deleting the emails. By clicking 'Yes', the emails are moved from your Outlook Inbox to the Outlook Deleted folder.

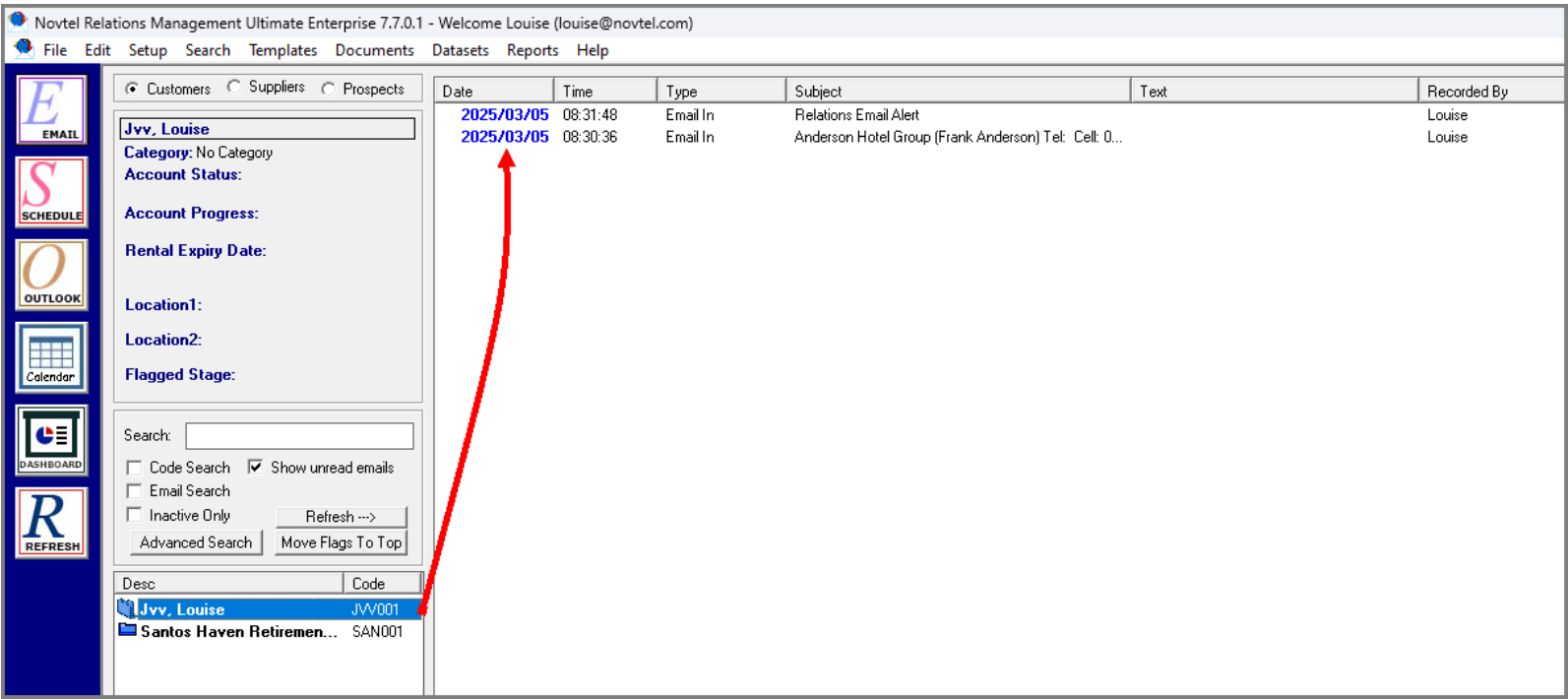
Email and/or SMS Communication



The emails will now be filtered to the relevant accounts.

By clicking on the 'Show Unread Emails' button, the accounts to which the emails were filtered will be listed, and the emails can be read directly from this screen by selecting the account and double clicking on the email to open it.

The date for all unread emails will be displayed in a bold blue colour.



Email and/or SMS Communication

After reading the email, the date's colour will turn black and will no longer be 'Bold Blue'.

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

Jvv, Louise
Category: No Category
Account Status:
Account Progress:
Rental Expiry Date:
Location1:
Location2:
Flagged Stage:

Search:
☐ Code Search ☒ Show unread emails
☐ Email Search
☐ Inactive Only

Desc	Code
 Jvv, Louise	JVV001
 Santos Haven Retiremen...	SAN001

Date	Time	Type	Subject	Text	Recorded
2025/03/05	08:31:48	Email In	Relations Email Alert		Louise
2025/03/05	08:30:36	Email In	Anderson Hotel Group (Frank Anderson) Tel: Cell: 0...		Louise



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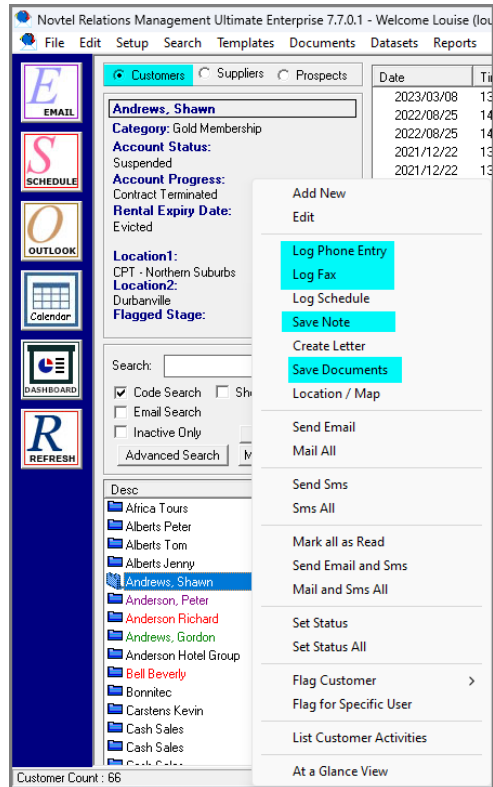
Relations Management

4

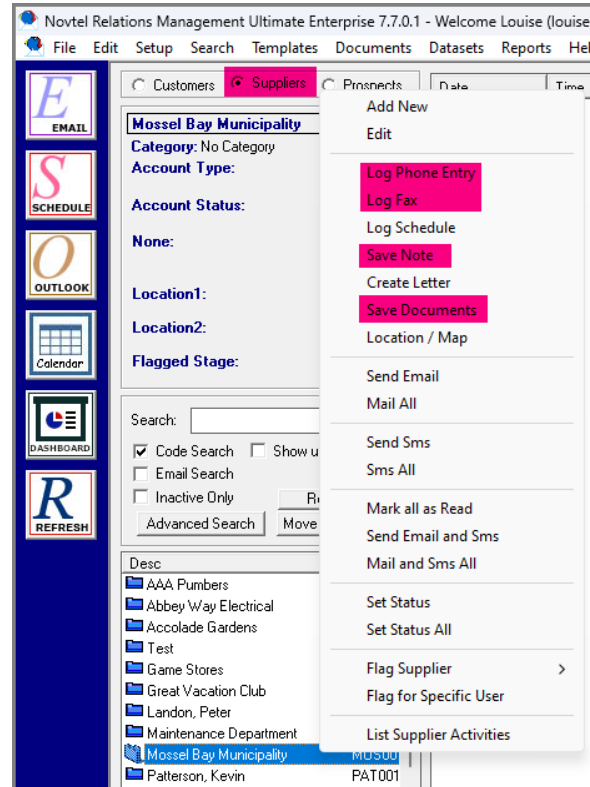
**Logging Notes on Phone Conversations;
Logging other Notes and Saving Documents**

Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

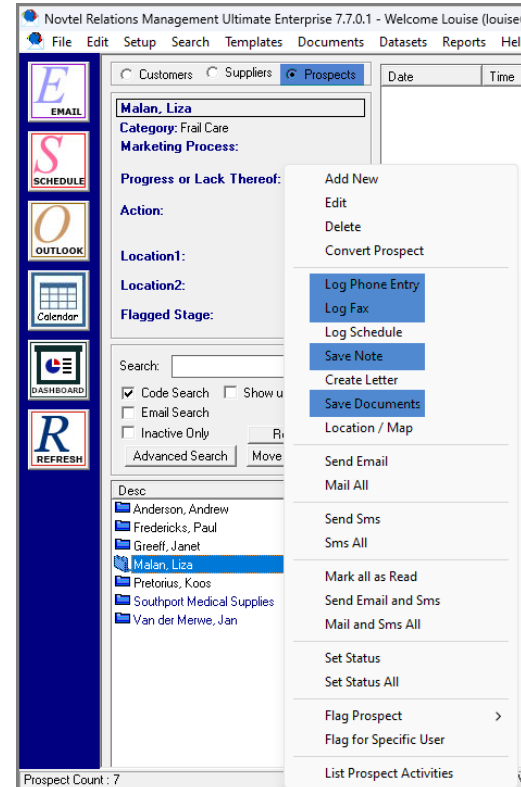
Customers



Suppliers



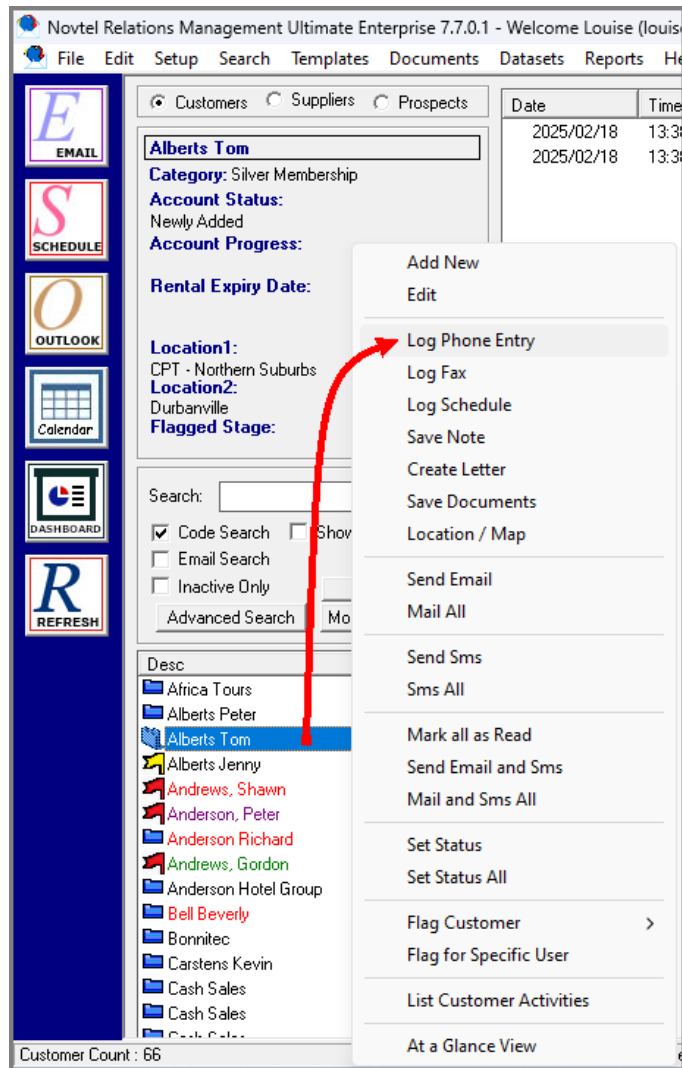
Prospects



Per account the following actions can be performed:

- ✓ Notes on phone conversations can be saved;
- ✓ If a fax was received, it can be logged to the account;
- ✓ Notes can be captured and if selected, reminders can be set and a task logged when saving the note;
- ✓ Documents such as contracts; receipts and invoices can be saved.

Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents



Right-clicking on a specific account and selecting the 'Log Phone Entry' option, the 'Log Phone' screen is displayed.

1. A Subject is to be captured and will be displayed on the Account's Communication Screen.
2. Detailed notes on the conversation are to be entered in the 'Note' field.

Log Phone

Subject: Complaint 2025-02-19 1

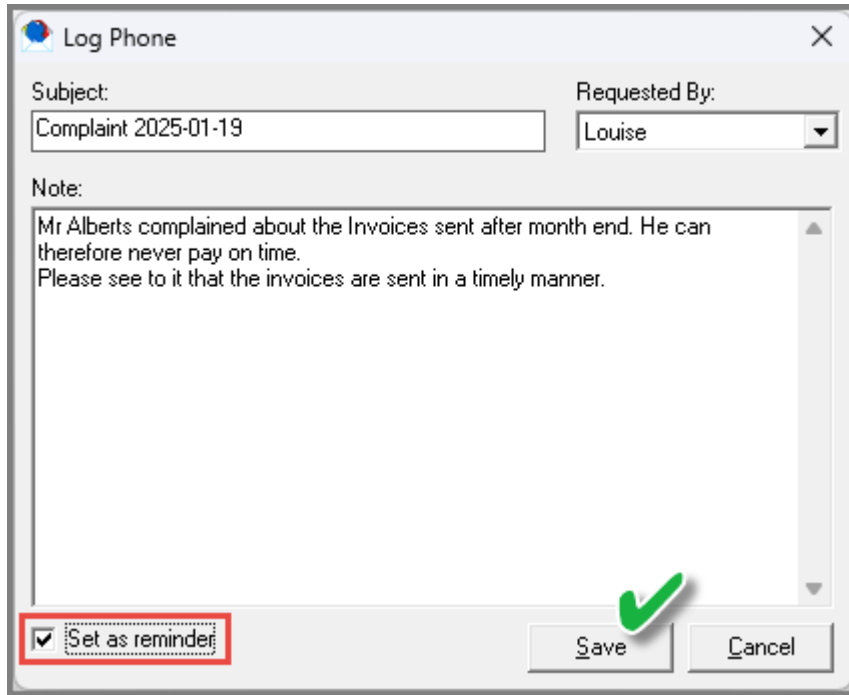
Requested By: Louise

Note:
Mr Alberts complained about the Invoices sent after month end. He can therefore never pay on time.
Please see to it that the invoices are sent in a timely manner. 2

☐ Set as reminder

Save Cancel

Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents



The 'Log Phone' dialog box is shown. It has a title bar with a close button. The 'Subject' field contains 'Complaint 2025-01-19'. The 'Requested By' dropdown menu is set to 'Louise'. The 'Note' text area contains the text: 'Mr Alberts complained about the Invoices sent after month end. He can therefore never pay on time. Please see to it that the invoices are sent in a timely manner.' At the bottom, the 'Set as reminder' checkbox is checked and highlighted with a red box. A green checkmark is placed over the 'Save' button.

Log Phone

Subject: Complaint 2025-01-19

Requested By: Louise

Note:

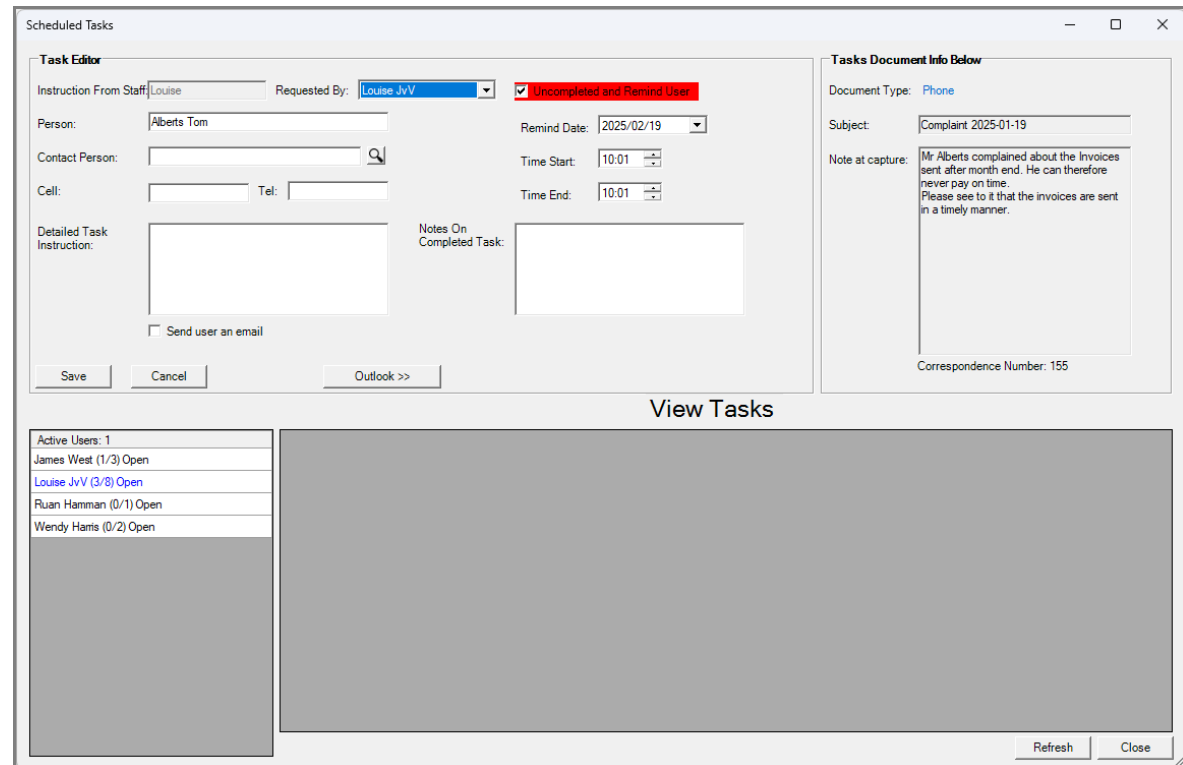
Mr Alberts complained about the Invoices sent after month end. He can therefore never pay on time. Please see to it that the invoices are sent in a timely manner.

☒ Set as reminder

Save Cancel

To be reminded of an action to be taken, the 'Set Reminder' checkbox is ticked before clicking 'Save'.

The 'Scheduled Tasks' window will be opened, and a task can now be scheduled, and a reminder set.



The 'Scheduled Tasks' window is shown. It has a title bar with standard window controls. The 'Task Editor' section on the left contains fields for 'Instruction From Staff' (Louise), 'Requested By' (Louise JvV), 'Person' (Alberts Tom), 'Contact Person', 'Cell', 'Tel', 'Dated Task Instruction', 'Remind Date' (2025/02/19), 'Time Start' (10:01), 'Time End' (10:01), and 'Notes On Completed Task'. The 'Uncompleted and Remind User' checkbox is checked. The 'Send user an email' checkbox is unchecked. The 'Tasks Document Info Below' section on the right contains fields for 'Document Type' (Phone), 'Subject' (Complaint 2025-01-19), 'Note at capture' (Mr Alberts complained about the Invoices sent after month end. He can therefore never pay on time. Please see to it that the invoices are sent in a timely manner.), and 'Correspondence Number' (155). At the bottom, there is a 'View Tasks' section with a list of active users and a large empty area for task details. The 'Refresh' and 'Close' buttons are at the bottom right.

Scheduled Tasks

Task Editor

Instruction From Staff: Louise Requested By: Louise JvV ☒ Uncompleted and Remind User

Person: Alberts Tom Remind Date: 2025/02/19

Contact Person: Time Start: 10:01

Cell: Tel: Time End: 10:01

Dated Task Instruction: Notes On Completed Task:

☐ Send user an email

Save Cancel Outlook >>

Tasks Document Info Below

Document Type: Phone

Subject: Complaint 2025-01-19

Note at capture: Mr Alberts complained about the Invoices sent after month end. He can therefore never pay on time. Please see to it that the invoices are sent in a timely manner.

Correspondence Number: 155

View Tasks

Active Users: 1

- James West (1/3) Open
- Louise JvV (3/8) Open
- Ruan Hamman (0/1) Open
- Wendy Harris (0/2) Open

Refresh Close

Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

Alberts Tom
Category: Silver Membership
Account Status: Newly Added
Account Progress:
Rental Expiry Date:
Location1: CPT - Northern Suburbs
Location2: Durbanville
Flagged Stage:

Search:
☒ Code Search ☐ Show unread emails
☐ Email Search
☐ Inactive Only

Desc Code
Africa Tours AFR001
Alberts Peter ALP001

Date	Time	Type	Subject
2025/02/19	10:01:56	Phone	Complaint 2025-01-19
2025/02/18	13:38:02	Sms	Happy Birthday!
2025/02/18	13:38:02	Email Out	Happy Birthday!

Log Phone

Subject: Complaint 2025-01-19 Requested By: Louise

Note:
Mr Alberts complained about the Invoices sent after month end. He can therefore never pay on time.
Please see to it that the invoices are sent in a timely manner.

1. The logged phone entry is now captured to the selected account, and by double clicking on the line, the logged entry is opened.
2. If required, the entry can be amended. If you wish to update the existing entry without creating a new line item, the 'Update Current' button is clicked after making the changes.
3. If the existing entry is to remain intact after making a change and a new entry is to be created, the 'Save New' button is clicked. In doing so, both the entries are now available on the account's communications screen.

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

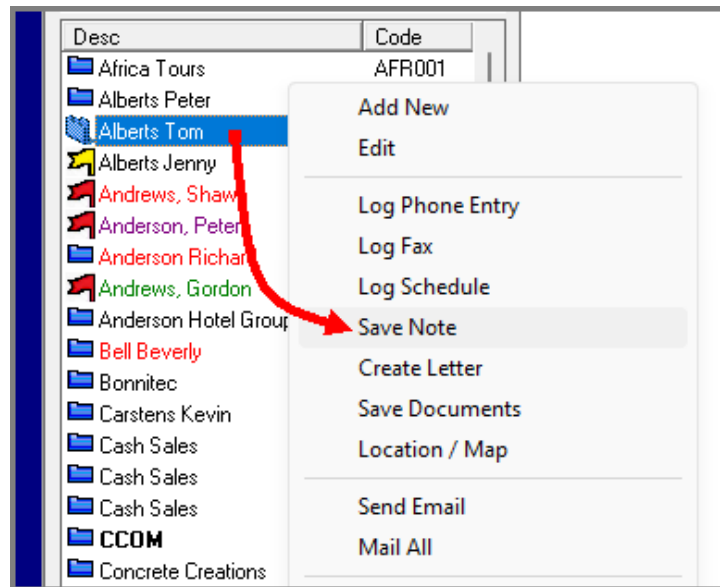
File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

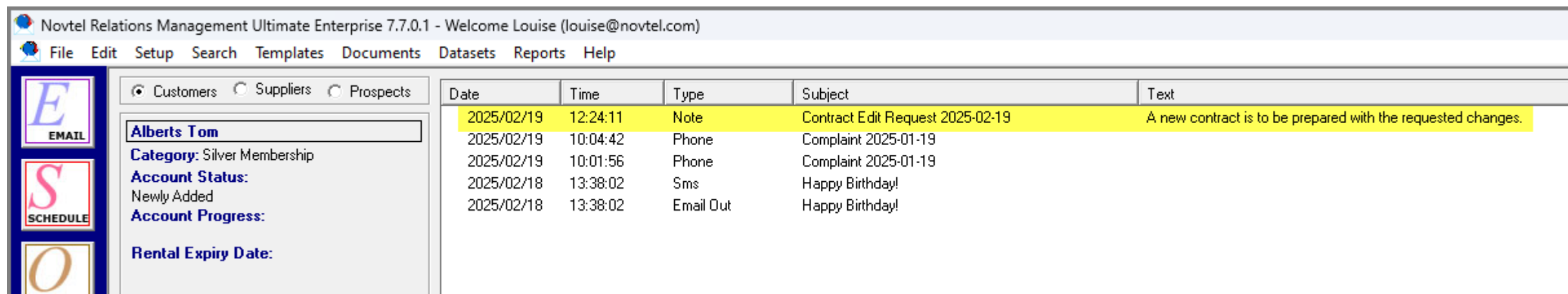
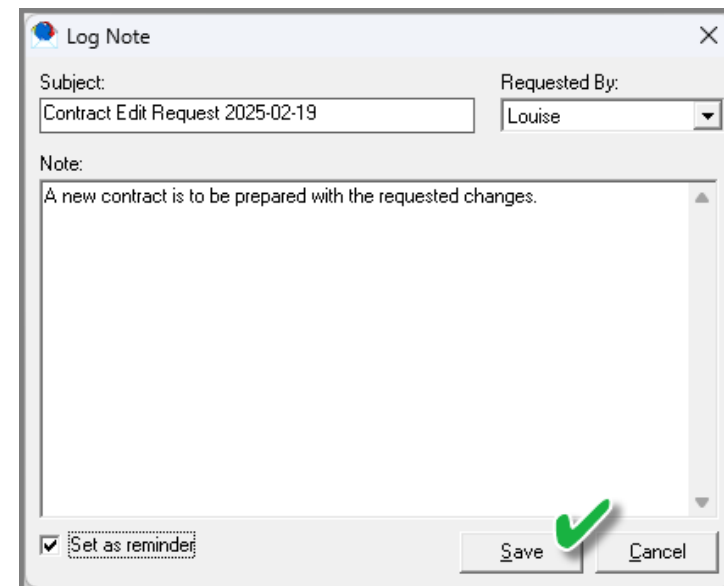
Alberts Tom
Category: Silver Membership
Account Status: Newly Added
Account Progress:
Rental Expiry Date:

Date	Time	Type	Subject
2025/02/19	10:04:42	Phone	Complaint 2025-01-19
2025/02/19	10:01:56	Phone	Complaint 2025-01-19
2025/02/18	13:38:02	Sms	Happy Birthday!
2025/02/18	13:38:02	Email Out	Happy Birthday!

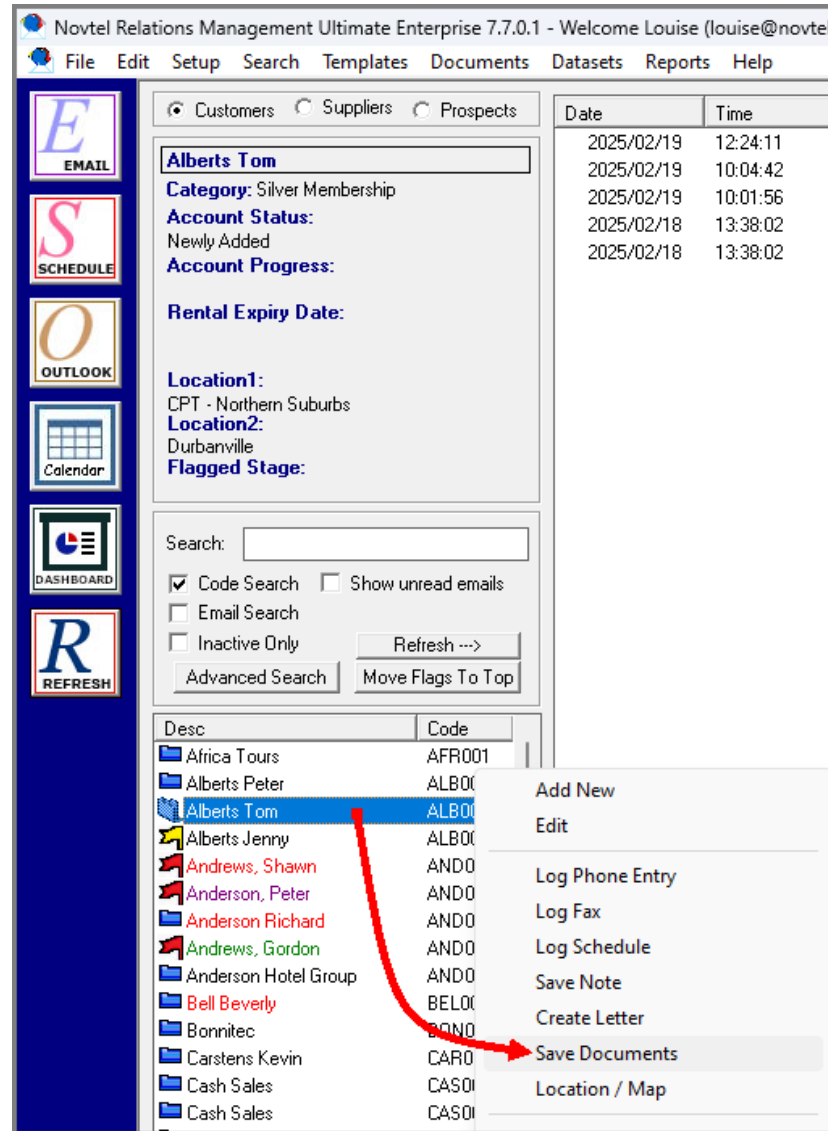
Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents



The exact same principles apply to saving a note, and the saved note will then be displayed at the top of the list in the Account's Communications window, from where it can be accessed, viewed, and if required, altered and re-saved.

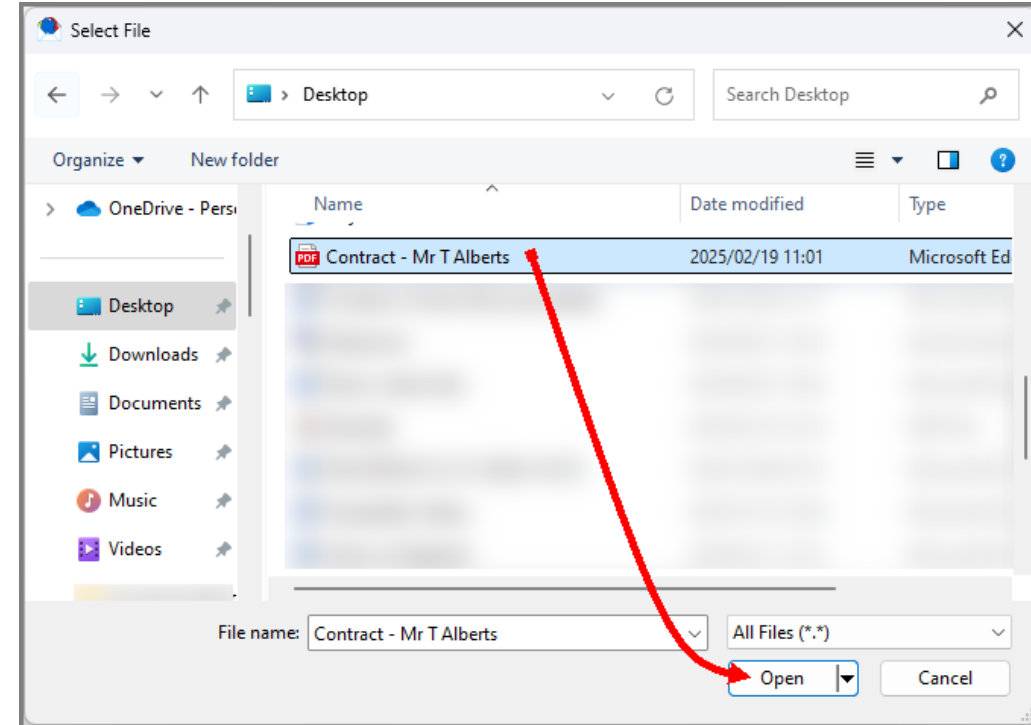


Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents



Documents can also be saved to obtain a complete communication history per Account. Such documents may include contracts and terms and conditions signed by the Account holder, etc.

Simply browse for the location where the document is stored and select it.



Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

The saved documents is now the latest addition to this Account and is displayed at the top of the list.

Double-clicking on the saved document, it is opened

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

☒ Customers ☐ Suppliers ☐ Prospects

Alberts Tom

Category: Silver Membership

Account Status: Newly Added

Account Progress:

Rental Expiry Date:

Date	Time	Type	Subject	Text
2025/02/19	12:30:37	Document	Contract - Mr T. Alberts.pdf	
2025/02/19	12:24:11	Note	Contract Edit Request 2025-02-19	A new contract is to be prepared with the requested changes.
2025/02/19	10:04:42	Phone	Complaint 2025-01-19	
2025/02/19	10:01:56	Phone	Complaint 2025-01-19	
2025/02/18	13:38:02	Sms	Happy Birthday!	
2025/02/18	13:38:02	Email Out	Happy Birthday!	

Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

Any existing correspondence can be right-clicked and flagged with the applicable priority level.

In doing so, the 'Set Flag Stage' window is opened and the applicable Flag Stages under the selected priority level can be set, and a note saved.

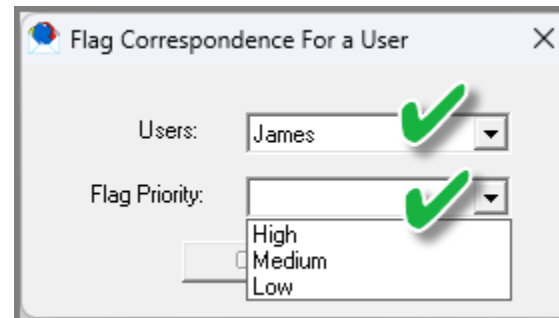
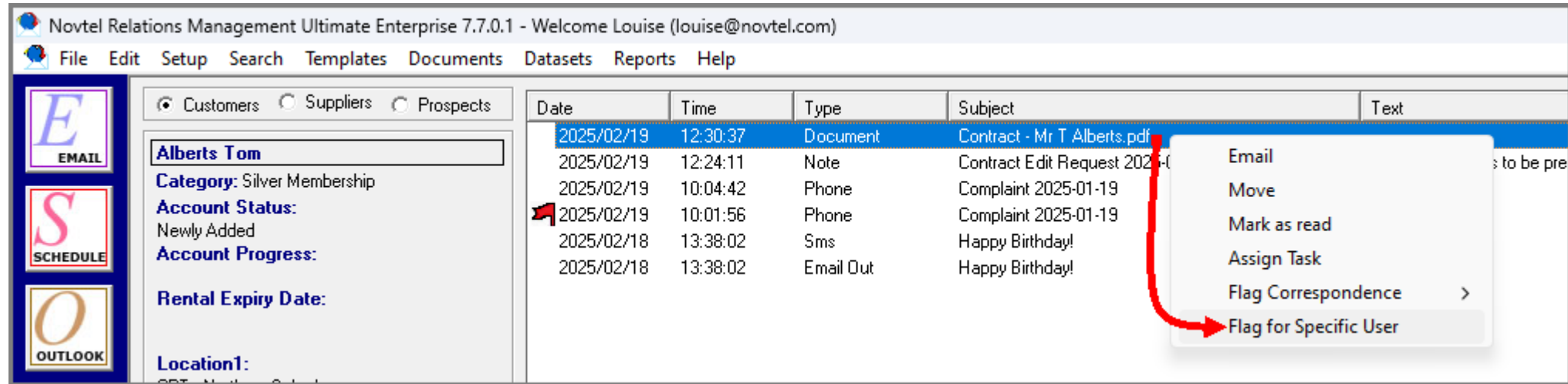
The screenshot shows the Novtel Relations Management Ultimate Enterprise 7.7.0.1 interface. On the left, there's a sidebar with icons for EMAIL, SCHEDULE, OUTLOOK, and Calendar. The main window displays a list of correspondence items. A context menu is open for the item 'Complaint 2025-01-19', showing options like Print, Move, Mark as read, Assign Task, Flag Correspondence, and Flag for Specific User. The 'Flag Correspondence' option is highlighted, and a sub-menu is visible with 'High Priority', 'Medium Priority', and 'Low Priority' options.

Date	Time	Type	Subject	Text	Recorder
2025/02/19	12:30:37	Document	Contract - Mr T Alberts.pdf		Louise
2025/02/19	12:24:11	Note	Contract Edit Request 2025-02-19	A new contract is to be prepared with the r...	Louise
2025/02/19	10:04:42	Phone	Complaint 2025-01-19		Louise
2025/02/19	10:01:56	Phone	Complaint 2025-01-19		Louise
2025/02/18	13:38:02	Sms	Happy Birthday!		Louise
2025/02/18	13:38:02	Email Out	Happy Birthday!		Louise

Date	Time	Type	Subject
2025/02/19	12:30:37	Document	Contract - Mr T Alberts.pdf
2025/02/19	12:24:11	Note	Contract Edit Request 2025-02-19
2025/02/19	10:04:42	Phone	Complaint 2025-01-19
2025/02/19	10:01:56	Phone	Complaint 2025-01-19
2025/02/18	13:38:02	Sms	Happy Birthday!
2025/02/18	13:38:02	Email Out	Happy Birthday!

Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

Right-clicking on any correspondence, it can be flagged for a specific User, and with the applicable Priority Level.





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Relations Management

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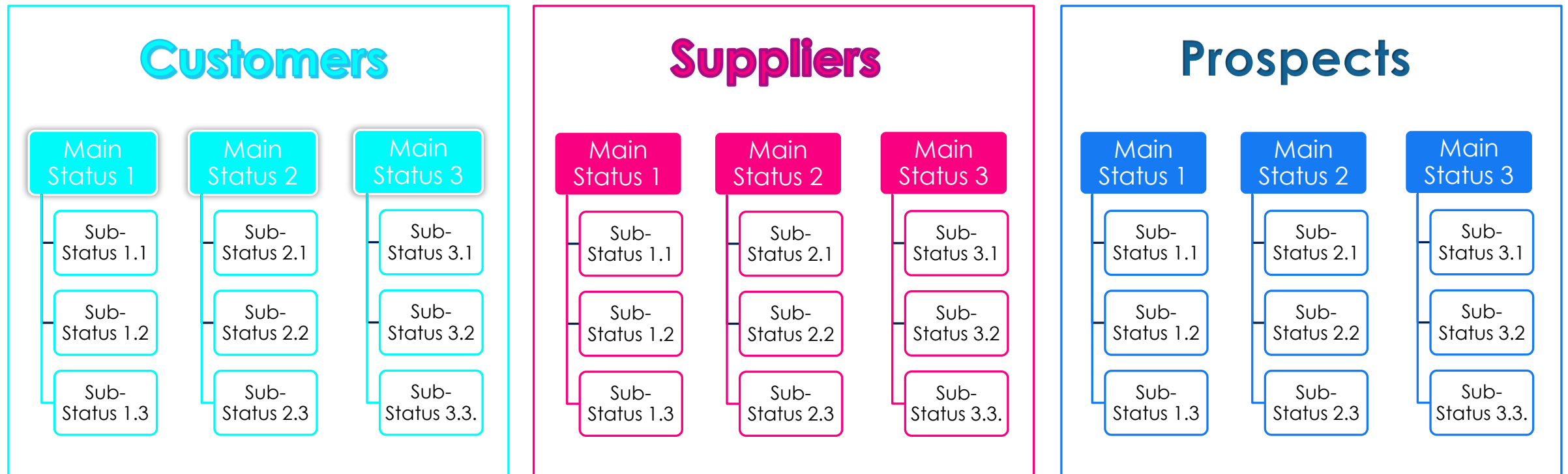
Statuses Explained

Statuses Explained

There are 3 main 'Statuses' to be created for Customers; Suppliers and Prospects, respectively.

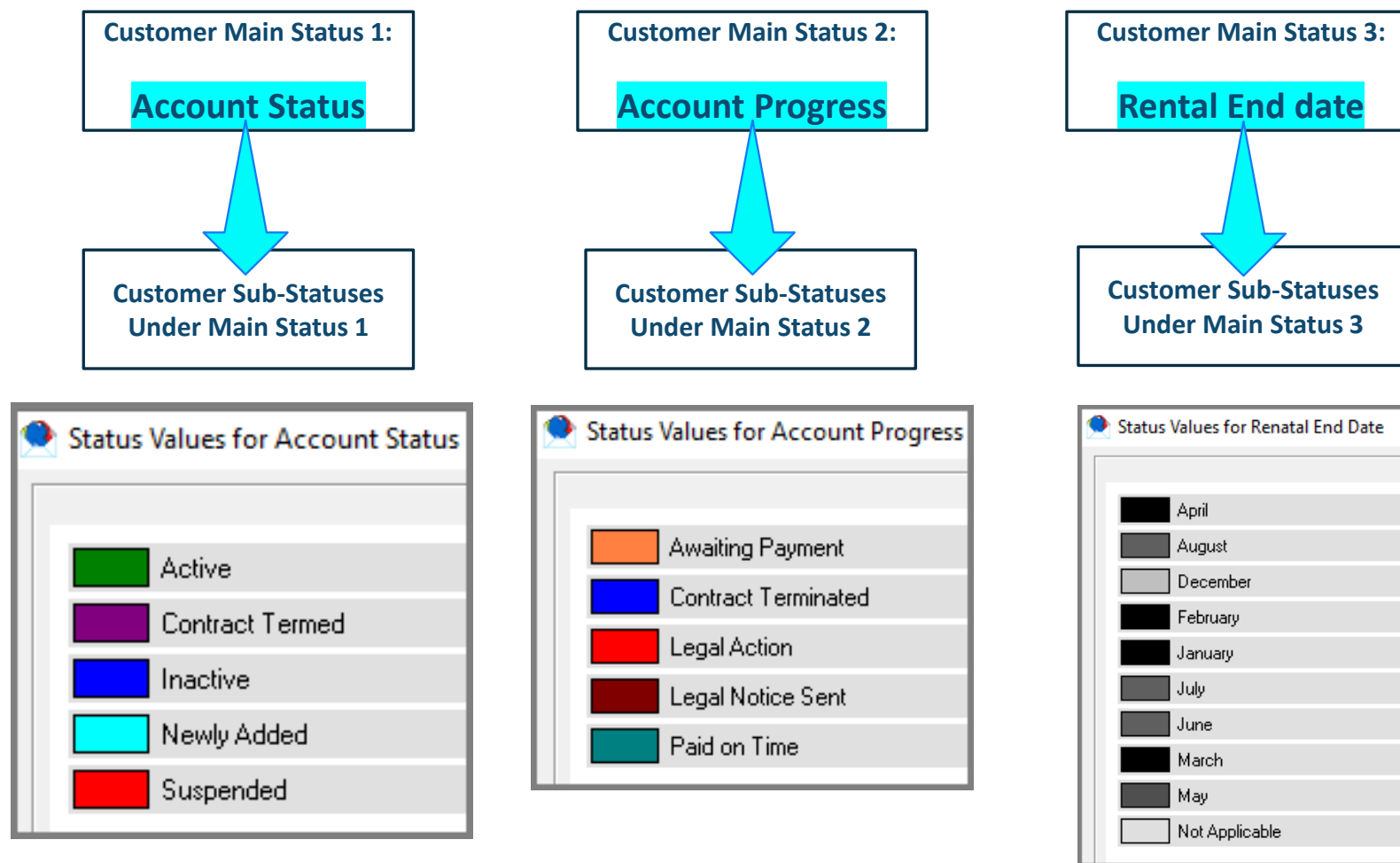
Unlimited sub-statuses can be created and linked to each main status.

The purpose is to determine the status of each individual account, at any given time.



Statuses Explained

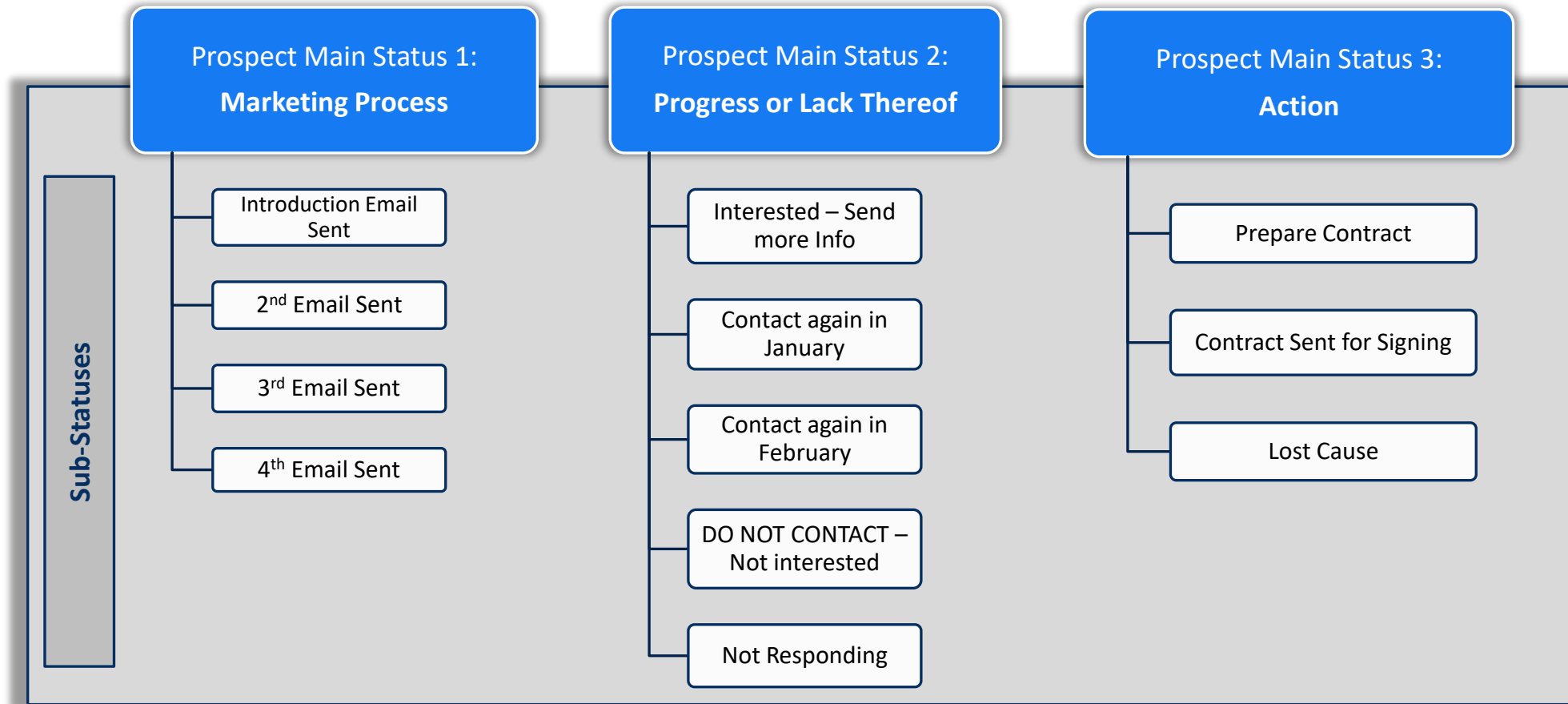
Examples of Customer Statuses and Sub-Statuses



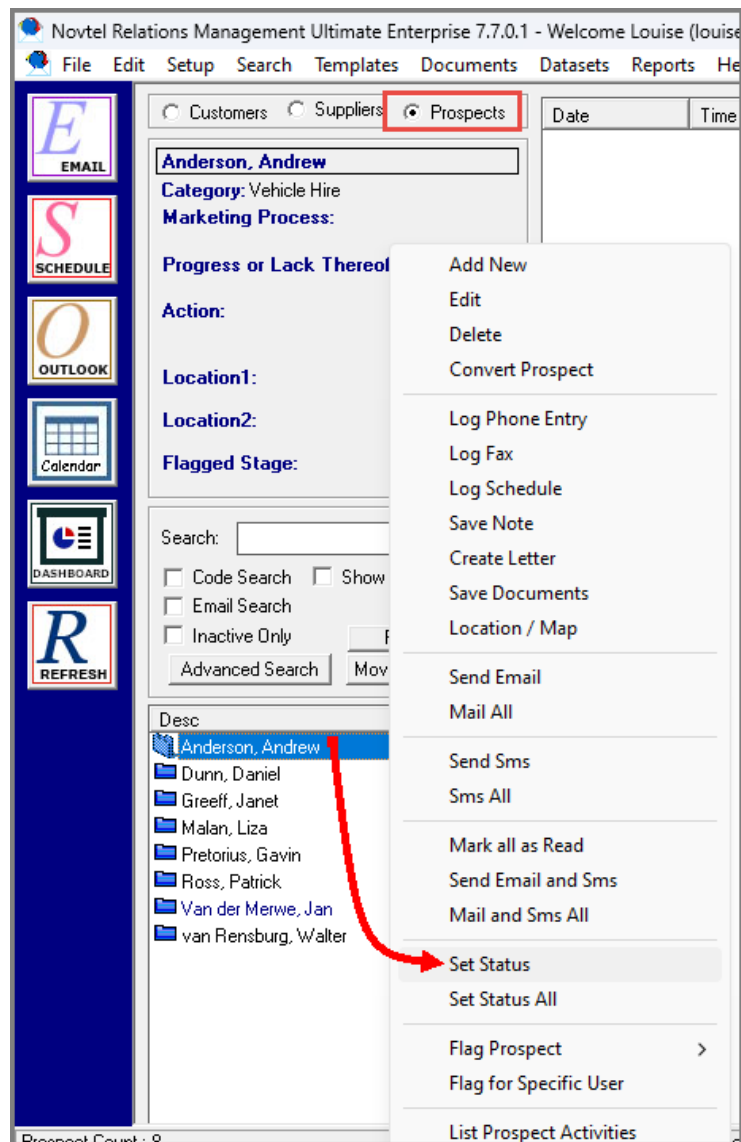
Statuses Explained

The main statuses alone will not be effective at all, and sub-statuses are needed to use this functionality successfully.

Examples for Prospect Main Status options, and what could be linked to each as Sub-Statuses, are as follow:



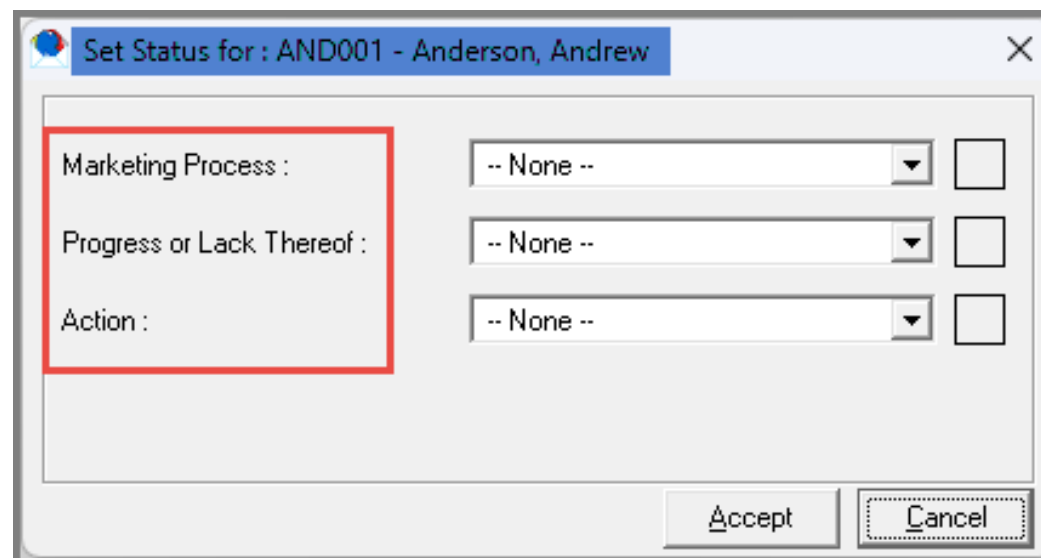
Statuses Explained



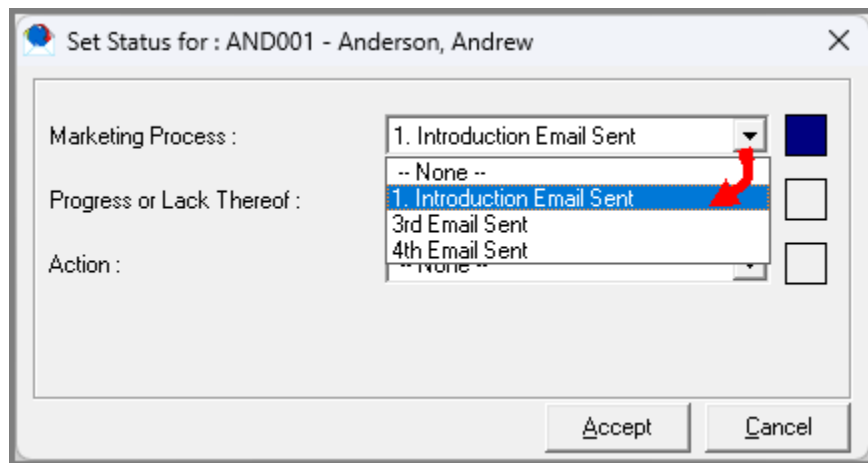
From the 'Prospects' window, a specific Prospect can be right-clicked and only this account's status changed as required, by selecting 'Set Status'.

The Prospect's 'Account Code and Name' will be displayed at the top of the window.

To the left of the window, the 3 main Prospect statuses are displayed.

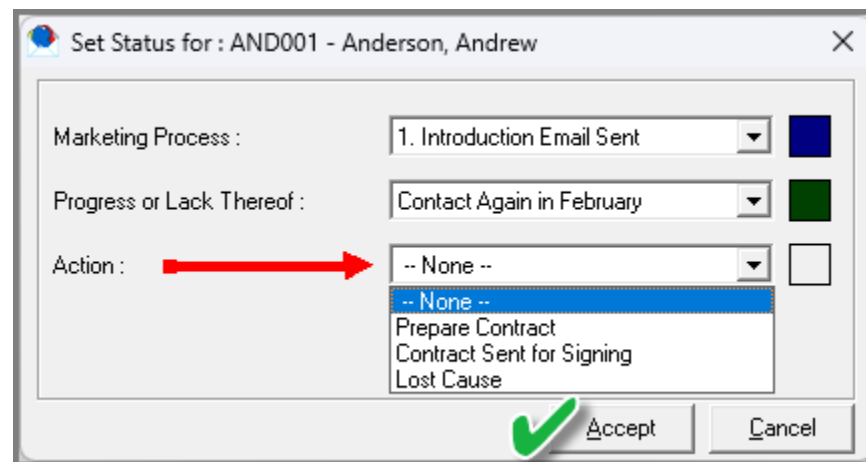
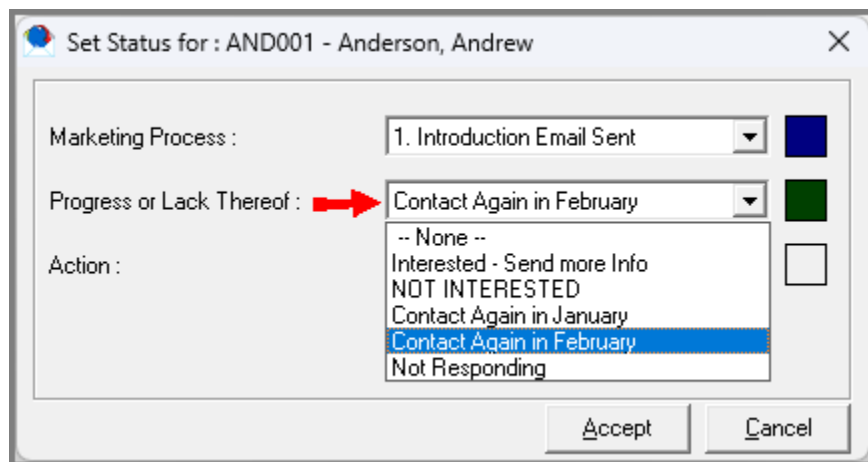


Statuses Explained



Clicking on the drop-down menu for each main status, all linked sub-statuses per main status will be displayed and can be selected as required.

- In this case, the 'Marketing Status' is 'Introduction Email Sent';
- The 'Progress or Lack Thereof' is linked to the 'Contact again in February' sub-status;
- And under the 'Action' Main Status we will not select a specific sub-status since there is no action to be taken currently.



Clicking 'Accept' the statuses have been set successfully.

Statuses Explained

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome

File Edit Setup Search Templates Documents Datasets

Customers Suppliers Prospects Date

Anderson, Andrew
Category: Vehicle Hire
Marketing Process:
1. Introduction Email Sent
Progress or Lack Thereof:
Contact Again in February
Action:

Location1:
Location2:
Flagged Stage:

Search:
☐ Code Search ☐ Show unread emails
☐ Email Search
☐ Inactive Only Refresh -->
Advanced Search Move Flags To Top

Desc	Code
Anderson, Andrew	AND001
Dunn, Daniel	DUN001
Greeff, Janet	GRE001
Malan, Liza	MAL001
Pretorius, Gavin	PRE001

Left sidebar icons: EMAIL, SCHEDULE, OUTLOOK, Calendar, DASHBOARD, REFRESH.

Specific statuses can be selected when an Advanced Search is performed in order to filter accounts linked to the same statuses.

A bulk email and / or SMS can be sent to all accounts listed, simultaneously.

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects Date

Anderson, Andrew
Category: Vehicle Hire
Marketing Process:
1. Introduction Email Sent
Progress or Lack Thereof:
Contact Again in February
Action:

Location1:
Location2:
Flagged Stage:

Search:
☐ Code Search ☐ Show unread emails
☐ Email Search
☐ Inactive Only Refresh -->
Advanced Search Move Flags To Top

Advanced Search Dialog Box:

Created By: ALL
Prospect Category: ALL
Location1: ALL
Location2: ALL
Marketing Process: 11 - 1. Introduction Email Sent
Progress or Lack Thereof: 18 - Contact Again in February
Action: ALL
Flagged User: ALL
Flagged Priority: ALL
Flagged Stage: ALL
Flagged Selection: ALL
Activities: ALL
Date Added: ☒ All 03/09/18 03/09/18
Clear All Searches Search >>



Novtel[®]

Relations Management

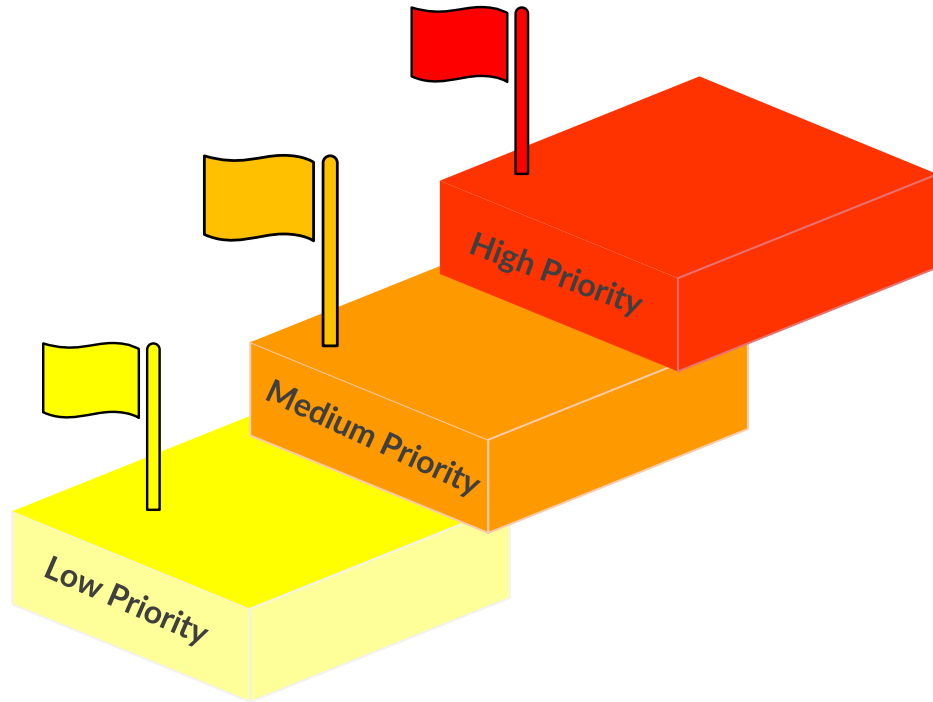
6

Flagging Accounts

Flagging Accounts

Accounts can be flagged with one of 3 priority levels, and a Flag Status can be linked to the Account.

An Account can be flagged for yourself; All Users in the Novtel System, or a specific User only.

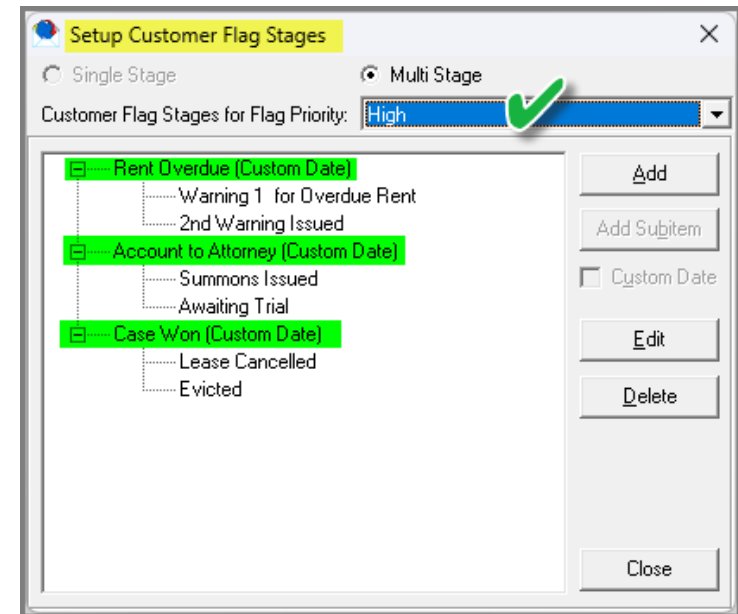


Flag stages must be pre-created in order for this functionality to be used correctly.

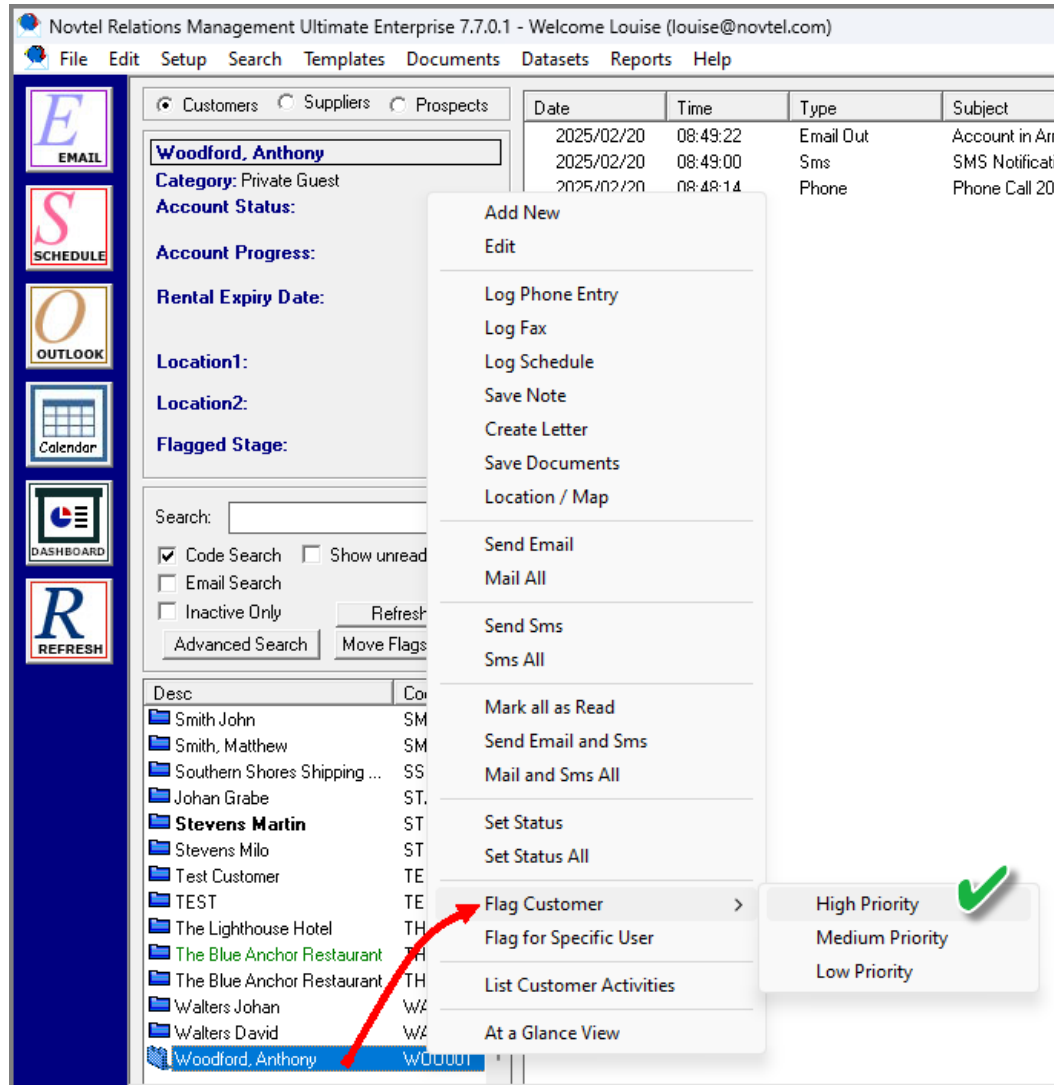
In our system, the **Customer Flag stages** for the High Priority Level have been set up as follow:

The **Main Stages** are displayed, and the Sub-Stages are linked to each Main Stage individually.

We have also selected the 'Custom Date' option to enable us to select a date when the Flag stages are set on a Customer account.

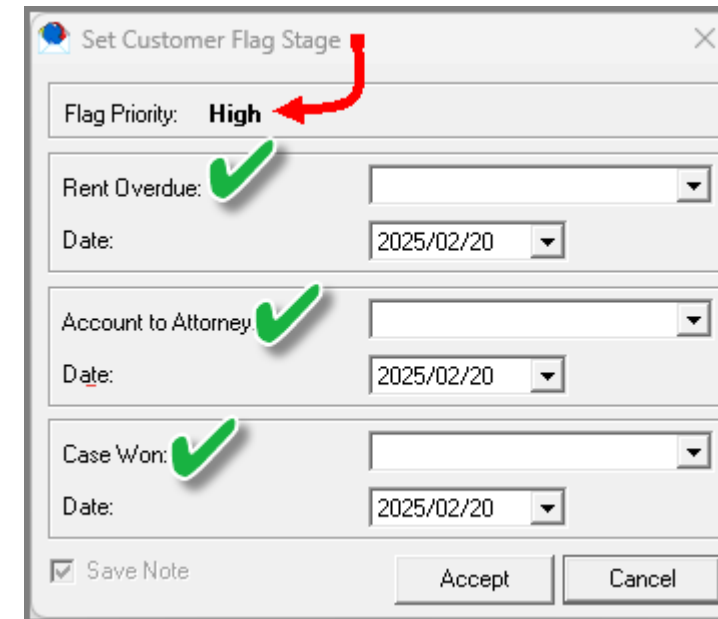


Flagging Accounts

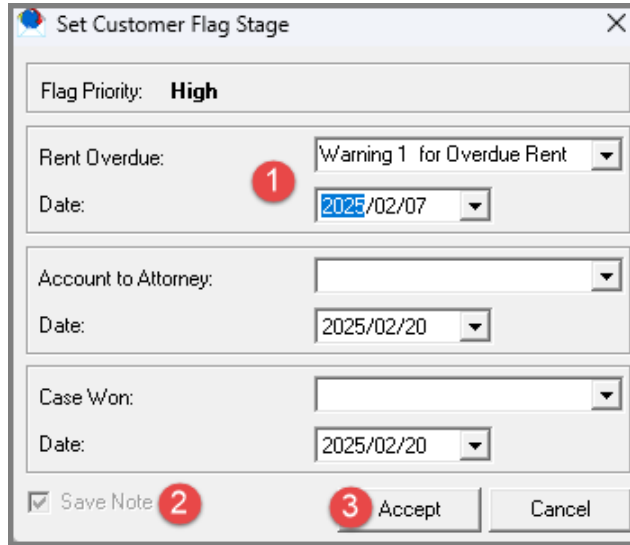


Right-clicking on an account, one of 3 flag priorities can be set.

In this case, we have selected the 'High Priority' level, and therefore, the 'Flag Priority' corresponds at the top of the screen, and the Flag Stages created under this level, are displayed.



Flagging Accounts



Set Customer Flag Stage

Flag Priority: **High**

Rent Overdue: Warning 1 for Overdue Rent

Date: 2025/02/07

Account to Attorney:

Date: 2025/02/20

Case Won:

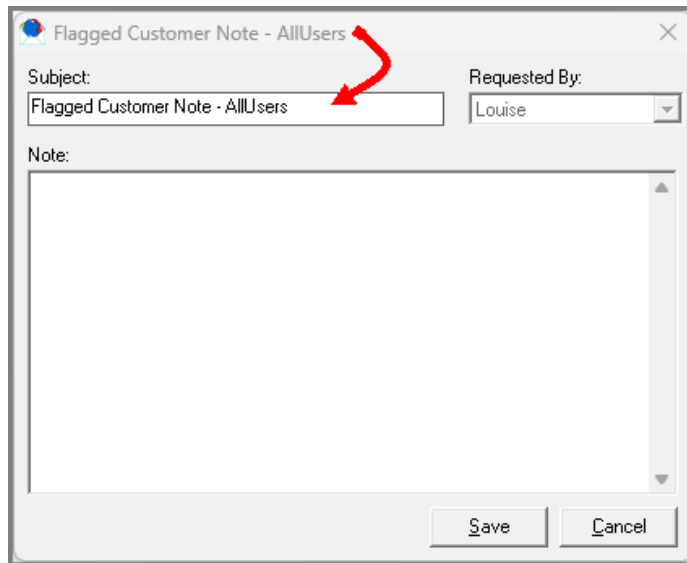
Date: 2025/02/20

☒ Save Note

Accept Cancel

Red circles with numbers 1, 2, and 3 highlight the Date field for Rent Overdue, the Save Note checkbox, and the Accept button respectively.

1. Per Main Stage, the required Sub-Stage is to be selected – where applicable, and the date set accordingly. If a sub-stage under a single main stage is applicable ONLY, the stage only will be selected and the date set.
2. By default, the 'Save Note' option is selected and cannot be deselected.
3. Clicking 'Accept', the 'Flagged Customer Note – All Users' screen is displayed, and a default 'Subject' is entered by Novtel.



Flagged Customer Note - AllUsers

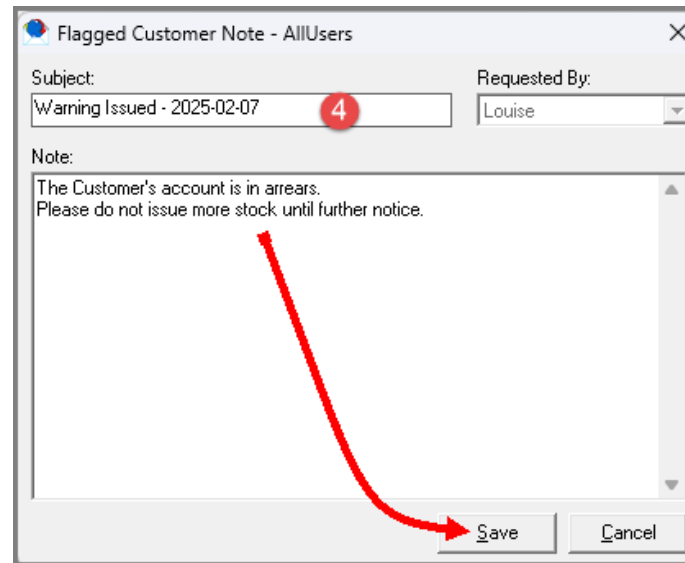
Subject: Flagged Customer Note - AllUsers

Requested By: Louise

Note:

Save Cancel

A red arrow points from the Subject field to the Note field.



Flagged Customer Note - AllUsers

Subject: Warning Issued - 2025-02-07

Requested By: Louise

Note:
The Customer's account is in arrears.
Please do not issue more stock until further notice.

Save Cancel

A red arrow points from the Note field to the Save button.

4. However: The subject can be altered to display the required information in the 'Subject' field on the Customer's communication screen.
The note can now be captured and saved.

Flagging Accounts

The Flagged Note is captured and can be accessed by all Users by simply double-clicking the line.

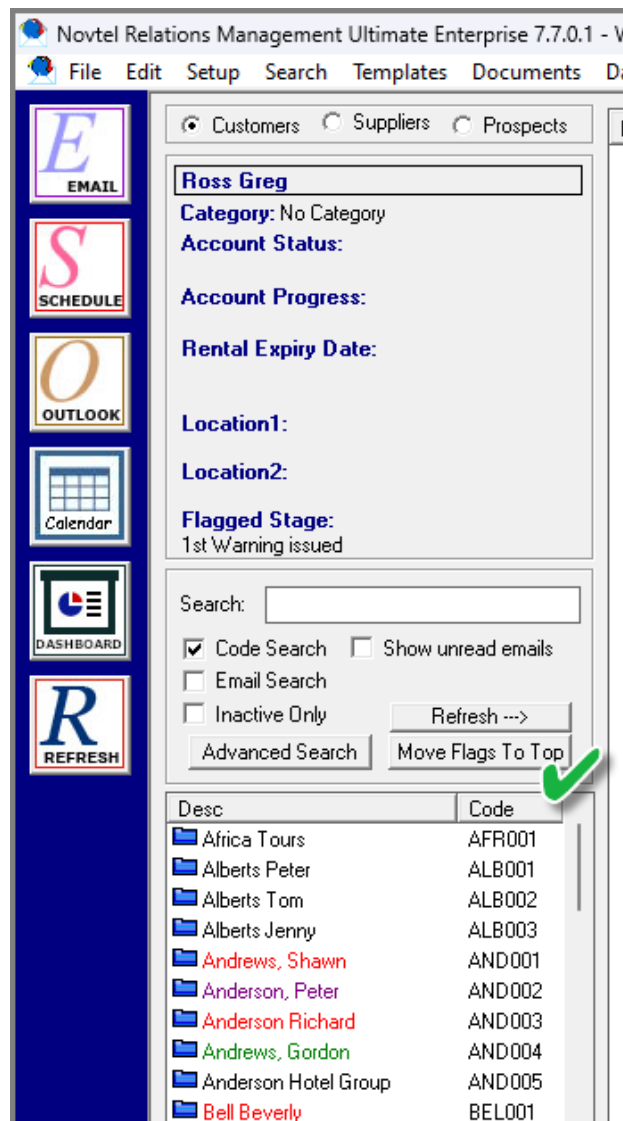
The account has been flagged successfully and displays a red flag – indicating that this is a High Priority Flag.

The screenshot displays the Novtel Relations Management Ultimate Enterprise 7.7.0.1 interface. The top menu bar includes File, Edit, Setup, Search, Templates, Documents, Datasets, Reports, and Help. The left sidebar contains icons for EMAIL, SCHEDULE, OUTLOOK, Calendar, DASHBOARD, and REFRESH. The main window shows the 'Customers' tab selected. The account details for 'Woodford, Anthony' are displayed, including Category: Private Guest, Account Status, Account Progress, Rental Expiry Date, Location1, Location2, and Flagged Stage: Warning 1 for Overdue Rent. A red arrow points from the 'Flagged Stage' field to the 'Flagged Note' entry in the table below. The table has columns for Date, Time, Type, and Subject. The 'Flagged Note' entry is highlighted. Below the table, there is a search bar and checkboxes for Code Search, Email Search, and Inactive Only. A list of accounts is shown at the bottom, with 'Woodford, Anthony' marked with a red flag icon.

Date	Time	Type	Subject
2025/02/20	09:48:38	Flagged Note	Warning Issued - 2025-02-07
2025/02/20	08:49:22	Email Out	Account in Arrears Email
2025/02/20	08:49:00	Sms	SMS Notification - Account in Arrears
2025/02/20	08:48:14	Phone	Phone Call 2025-02-20

Desc	Code
Smith John	SMI002
Smith, Matthew	SMI003
Southern Shores Shipping ...	SSS001
Johan Grabe	STA004
Stevens Martin	STE001
Stevens Milo	STE002
Test Customer	TES001
TEST	TES002
The Lighthouse Hotel	THE001
The Blue Anchor Restaurant	THE002
The Blue Anchor Restaurant	THE003
Walters Johan	WAL001
Walters David	WAL003
Woodford, Anthony	WOO001

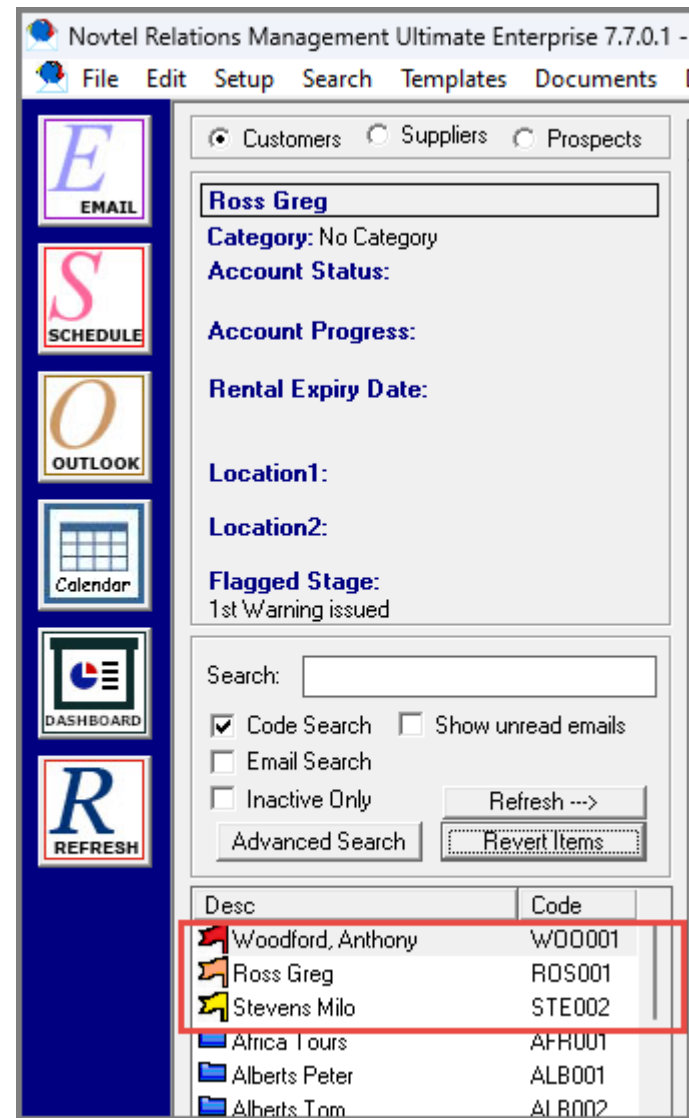
Flagging Accounts



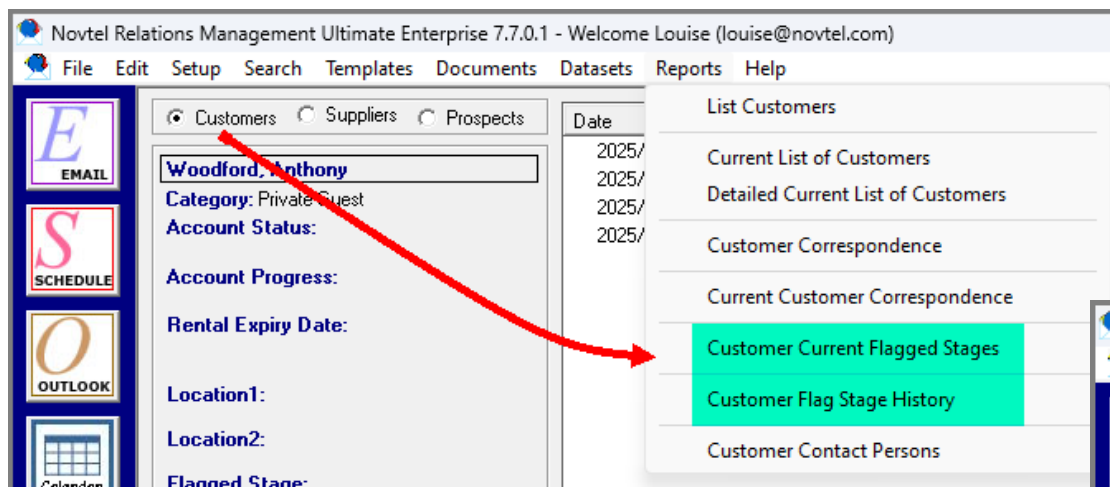
To ensure easy access to all flagged accounts – **in order of priority** – click on the 'Move Flags To Top' button.

The Flagged accounts will be displayed at the top of the list.

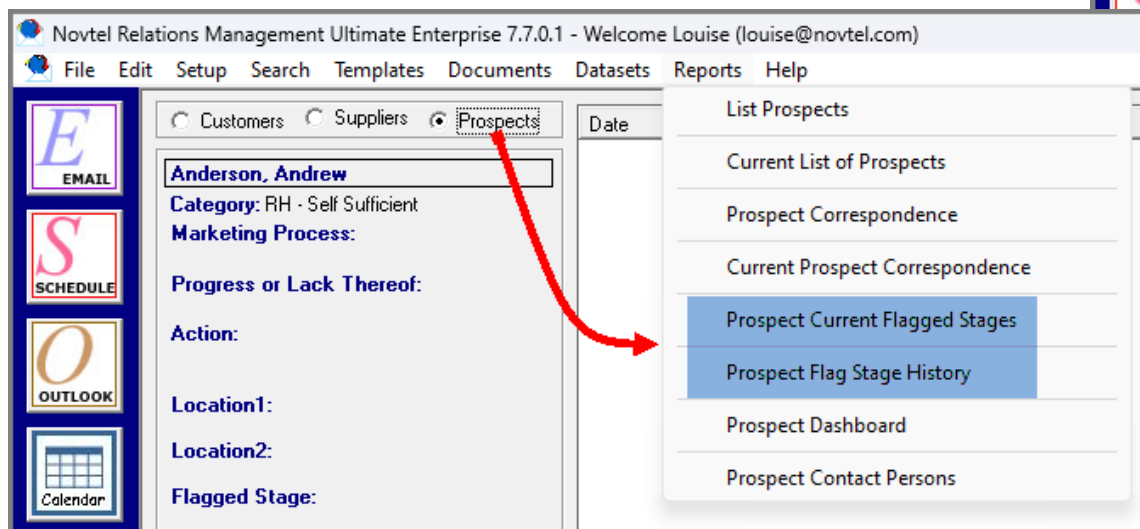
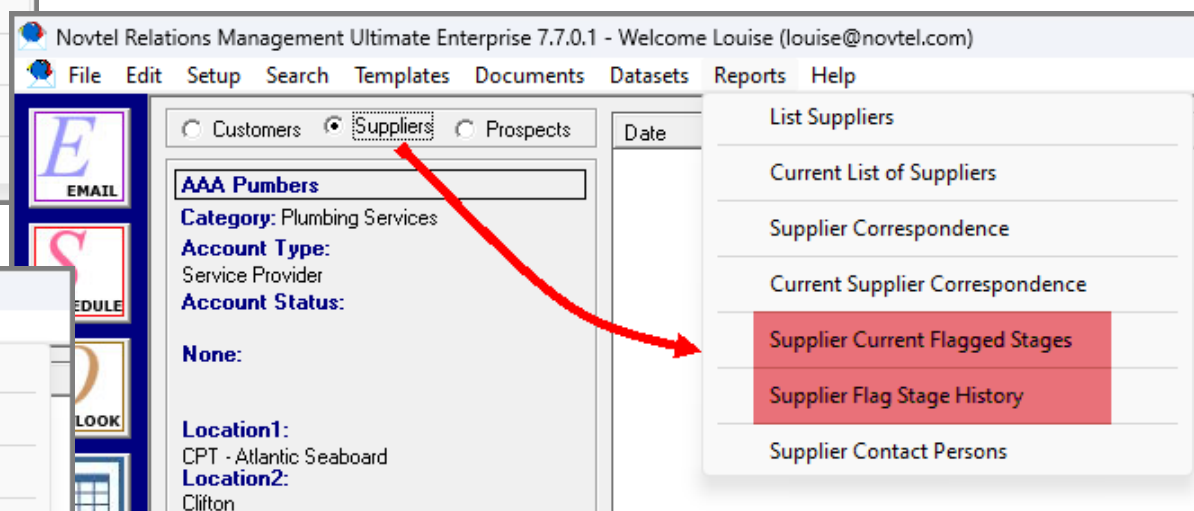
By clicking on the required Account, the Flagged Note can be accessed, and the necessary action taken.



Flagging Accounts



Under the 'Customers'; 'Suppliers' and 'Prospects' headings, reports can be obtained pertaining to the 'Flag Stages' linked per Account.





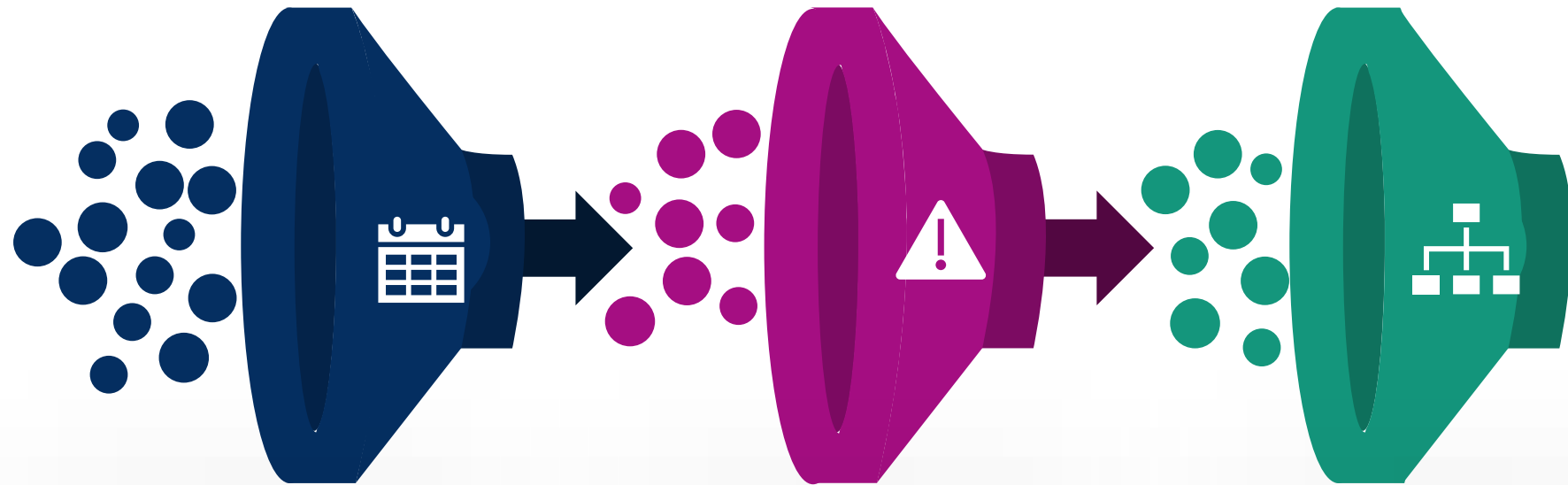
Relations Management

7

The Scheduling System

The Scheduling System

Complete and incomplete tasks can be tracked; a task history is obtained; and the auto reminder and flagging functions will assist in keeping tasks organised.



Schedule Tasks for yourself
or another System User

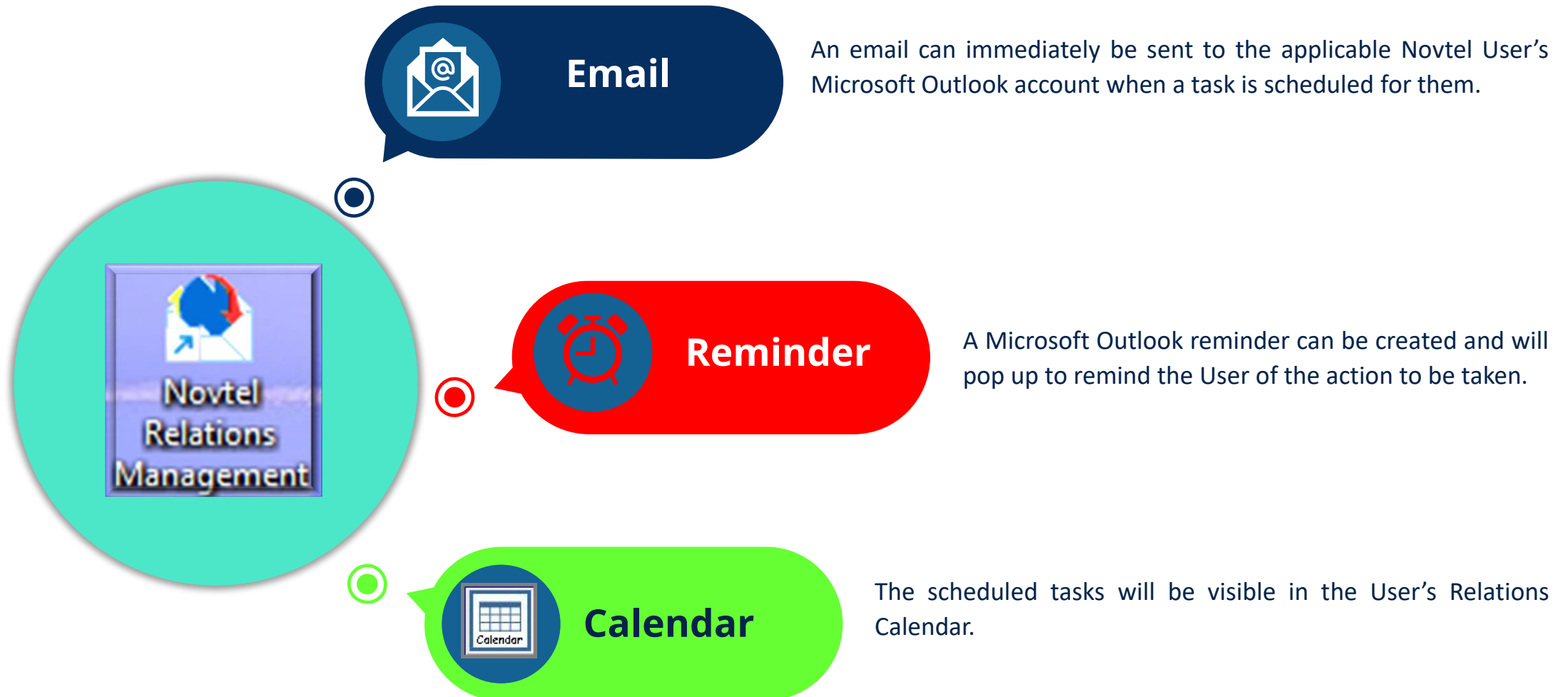


Set Reminders for
incomplete tasks

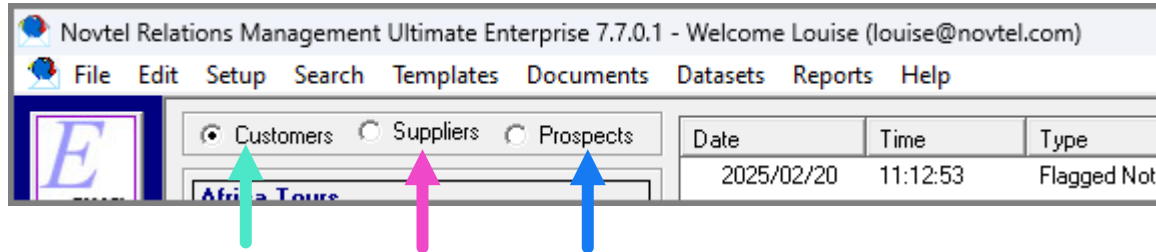


Track and manage complete and
incomplete tasks with ease

The Scheduling System

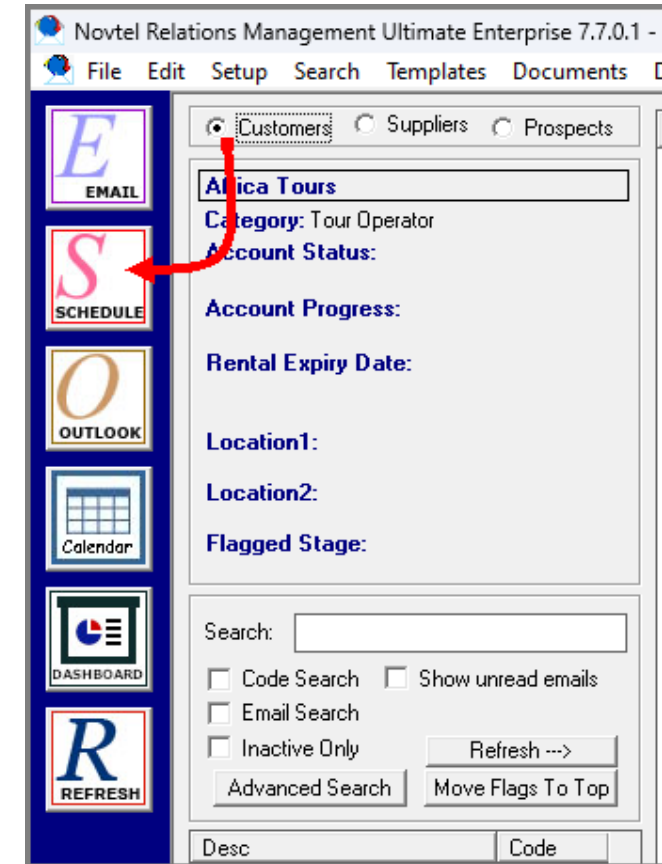


The Scheduling System



Tasks can be scheduled for Customers, Suppliers or Prospects respectively by first selecting the relevant option here.

There are various methods in which to access the scheduling screen, but for demonstration purposes, we will simply click on the 'Schedule' icon in the 'Customers' window.



The Scheduling System

Scheduled Tasks

Task Editor

Instruction From Staff: Requested By: ☐ Uncompleted and Remind User

Person:

Contact Person:

Cell: Tel:

Detailed Task Instruction:

Notes On Completed Task:

☐ Send user an email

Tasks Document Info Below

Document Type:

Subject:

Note at capture:

Correspondence Number:

View Tasks

Active Users: 1

- James West (1/3) Open
- Louise JvV (3/8) Open**
- Ruan Hamman (0/1) Open
- Wendy Harris (0/2) Open

Code	Description	CompletedNote
5	Arrange Relations Demo	
6	Send quote for repairs	
7	Send quote for repairs	Quote Sent
8	Please send quotation on Property and Relations Management Software.Integrated with Sage Pastel Partner, and for 10 Users each.	Quote Sent and got a reply already that
10	Please send quotation on Property and Relations Management Software.Integrated with Sage Pastel Partner, and for 10 Users each.	Quote was sent successfully.
11	Please contact Erica for a demonstration on our Relations Mobile App.	Demo went well, and the client will con
12		
18	Please issue a quotation ASAP for Novtel Relations Management.	

In the 'Scheduled Tasks' window, first click on the applicable User and click 'Add'.

Scheduled Tasks

Task Editor

Instruction From Staff: Requested By:

Person:

Contact Person:

Cell: Tel:

These 4 fields can be populated **manually** if required.

The Scheduling System

The screenshot shows the 'Scheduled Tasks' window with the 'Task Editor' tab active. The 'Instruction From Staff' field is set to 'Louise' and 'Requested By' is also 'Louise'. The 'Person' field is empty. The 'Contact Person' field has a search icon. The 'Cell' and 'Tel' fields are empty. The 'Detailed Task Instruction' field is empty. A 'ContactPersonWindow' dialog is open, displaying a table of contact persons. A red arrow points from the 'Contact Person' search icon in the Task Editor to the 'Frank Anderson' entry in the ContactPersonWindow table.

Code	Contact Person	Customer
AND002	Peter Anderson	Anderson, Peter
AND004	Jason Andrews	Andrews, Gordon
AND005	Theresa Anderson	Anderson Hotel Group
AND005	Frank Anderson	Anderson Hotel Group
EXP002	Erica James	
EXP002	Frank James	
FLO001	Sharon	
STA008	Peter Langa	
THE001	Jason Fredericks	The Lighthouse Hotel

However: By selecting the 'Contact Person' search option and selecting the specific person from the list, their details will automatically be captured here as inserted on the Contact Person master file.

The screenshot shows the 'Scheduled Tasks' window with the 'Task Editor' tab active. The 'Instruction From Staff' field is set to 'Louise' and 'Requested By' is 'Louise JvV'. The 'Person' field is set to 'Anderson Hotel Group' with a green checkmark. The 'Contact Person' field is set to 'Frank Anderson' with a green checkmark and a search icon. The 'Cell' field is set to '082445566' with a green checkmark. The 'Tel' field is empty.

The Scheduling System

Scheduled Tasks

Task Editor

Instruction From Staff: Requested By:

Person:

Contact Person:

Cell: Tel:

Detailed Task Instruction:

Notes On Completed Task:

☒ Send user an email

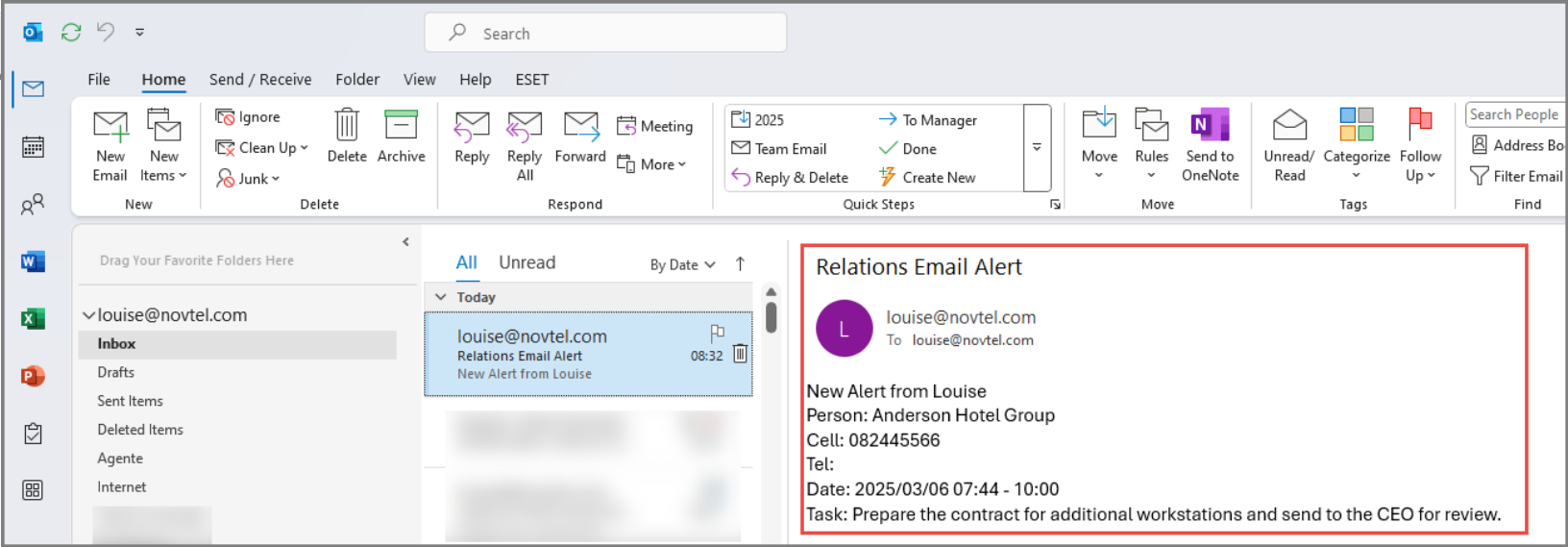
Instruction for task

A detailed instruction for the applicable Novtel User must be entered in this field. The note entered here, will be available on the Outlook reminder, as well as on the Relations calendar.

Send User an email

Ensure that this checkbox is selected in order for the User to receive an email that a task was logged for her.

The email will be displayed as follows:



The Scheduling System

The screenshot displays the 'Scheduled Tasks' window. The 'Task Editor' section includes fields for 'Instruction From Staff' (Louise), 'Requested By' (Louise JvV), and a checkbox for 'Uncompleted and Remind User'. The 'Person' field is set to 'Anderson Hotel Group', and the 'Contact Person' is 'Frank Anderson'. The 'Cell' field contains '082445566'. The 'Detailed Task Instruction' is 'Prepare the contract for additional workstations and send to the CEO for review.' A red arrow points from the 'Outlook >>' button to the 'Outlook Schedule' dialog box.

The 'Outlook Schedule' dialog box contains the following fields:

- Outlook Schedule:**
- Start Date and Time:** 2025/03/05 (1) 7:44
- End Date And Time:** 2025/03/05 (2) 10:00
- Also Remind:** ☒ "Requested By" user (3)
- Remind ahead of time: (min)** 5 (4)

At the bottom of the dialog are 'Accept' and 'Cancel' buttons, with a green checkmark next to 'Accept'.

At the bottom of the 'Task Editor' window, there is a table with the following data:

Active Users: 1	Code	Description
James West (1/3) Open	5	Arrange Relations De
Louise JvV (3/8) Open	6	Send quote for repair
Ruan Hamman (0/1) Open	7	Send quote for repairs

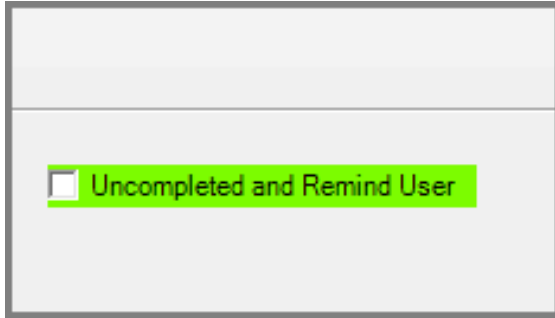
MS Outlook settings

Clicking on the 'MS Outlook' button, the 'Outlook Schedule' screen will be displayed, and the schedule set up here will cause the Outlook Calendar reminder to pop up on the User's computer.

1. By default, the 'Start' and 'End Date' will always be the current date and time and can be amended if required.
2. The end date and time for the reminder to be completed, must be captured. In this case, the task must be completed on the current day, and by 10am.
3. As one user can schedule a task for another User, the person scheduling the task can also be reminded if so selected.
4. The number of minutes prior to the end date and time to be reminded, can now be set. The options are: 0, 2, 5, 10, 15, 20, 30, 45 and 60 minutes.

Click 'Accept' to save the Outlook Schedule.

The Scheduling System

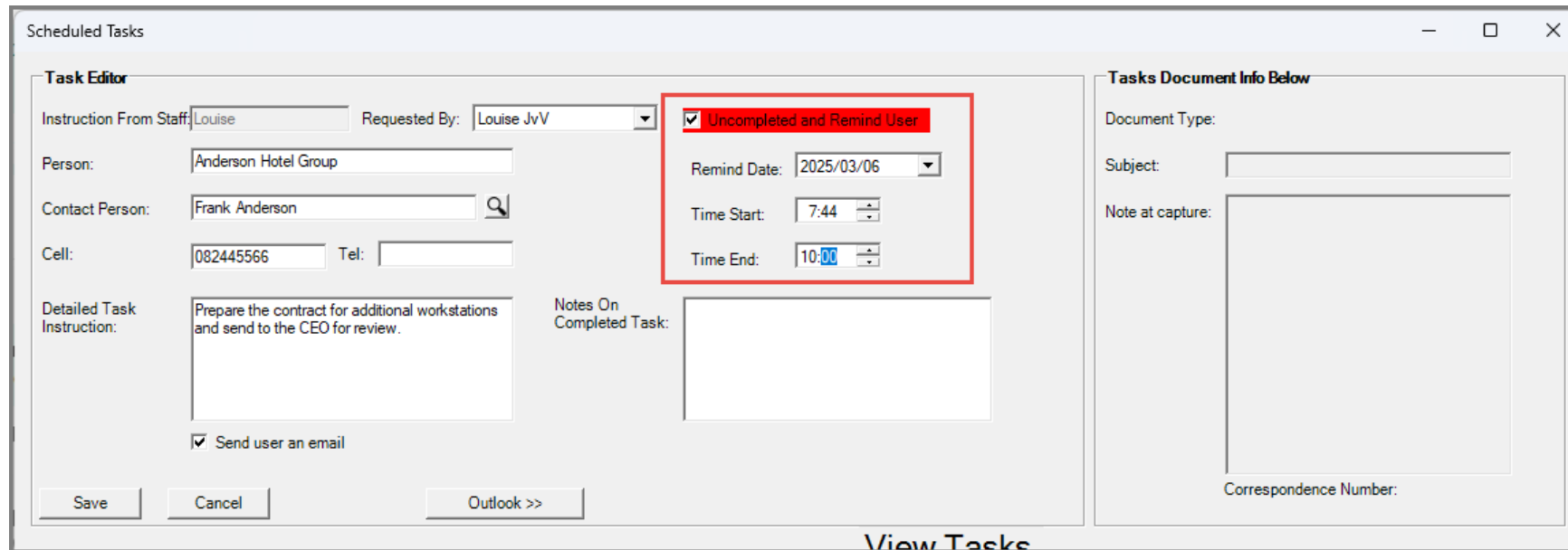


A close-up of a checkbox labeled 'Uncompleted and Remind User'. The checkbox is currently unchecked, and the text is displayed on a green background.

By default, the 'Uncompleted and Remind User' option is deselected and is displayed in a green background colour.

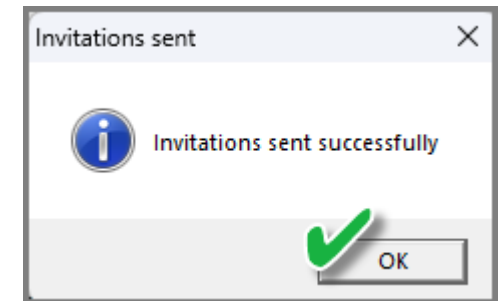
However: If this option is ticked, the wording is displayed in a red background, indicating the task has not yet been completed.

The 'Reminder' date, as well as the reminder start, and end times can now be set.



The 'Scheduled Tasks' window is shown. The 'Task Editor' section contains fields for 'Instruction From Staff' (Louise), 'Requested By' (Louise JvV), 'Person' (Anderson Hotel Group), 'Contact Person' (Frank Anderson), 'Cell' (082445566), and 'Tel'. The 'Detailed Task Instruction' field contains the text 'Prepare the contract for additional workstations and send to the CEO for review.' The 'Notes On Completed Task' field is empty. The 'Uncompleted and Remind User' checkbox is checked, and the 'Remind Date' is set to 2025/03/06. The 'Time Start' is 7:44 and the 'Time End' is 10:00. The 'Send user an email' checkbox is also checked. The 'Tasks Document Info Below' section contains fields for 'Document Type', 'Subject', 'Note at capture', and 'Correspondence Number'. The 'Save', 'Cancel', and 'Outlook >>' buttons are at the bottom.

Clicking 'Save', the task has been assigned to a specific User, and the emails sent successfully.



The Scheduling System

Scheduled Tasks

Task Editor

Instruction From Staff: Louise

Requested By: James West

☒ Uncompleted and Remind User

Person: Anderson Hotel Group

Remind Date: 2025/03/06

Contact Person: Frank Anderson

Time Start: 7:44

Cell: 082445566

Tel:

Time End: 10:00

Detailed Task Instruction: Prepare the contract for additional workstations and send to the CEO for review.

Notes On Completed Task:

☐ Send user an email

Add

Edit

Delete

Tasks Document Info Below

Document Type:

Subject:

Note at capture:

Correspondence Number:

View Tasks

Active Users: 1

James West (1/3) Open

Louise JvV (4/9) Open

Ruan Hamman (0/1) Open

Wendy Harris (0/2) Open

Code	Description	Completed	Note
5	Arrange Relations Demo		
6	Send quote for repairs		
7	Send quote for repairs		Quote Sent
8	Please send quotation on Property and Relations Management Software.Integrated with Sage Pastel Partner, and for 10 Users each.		Quote Sent and got a reply already that
10	Please send quotation on Property and Relations Management Software.Integrated with Sage Pastel Partner, and for 10 Users each.		Quote was sent successfully.
11	Please contact Erica for a demonstration on our Relations Mobile App.		Demo went well, and the client will con
12			
18	Please issue a quotation ASAP for Novtel Relations Management.		
19	Prepare the contract for additional workstations and send to the CEO for review.		

Refresh

Close

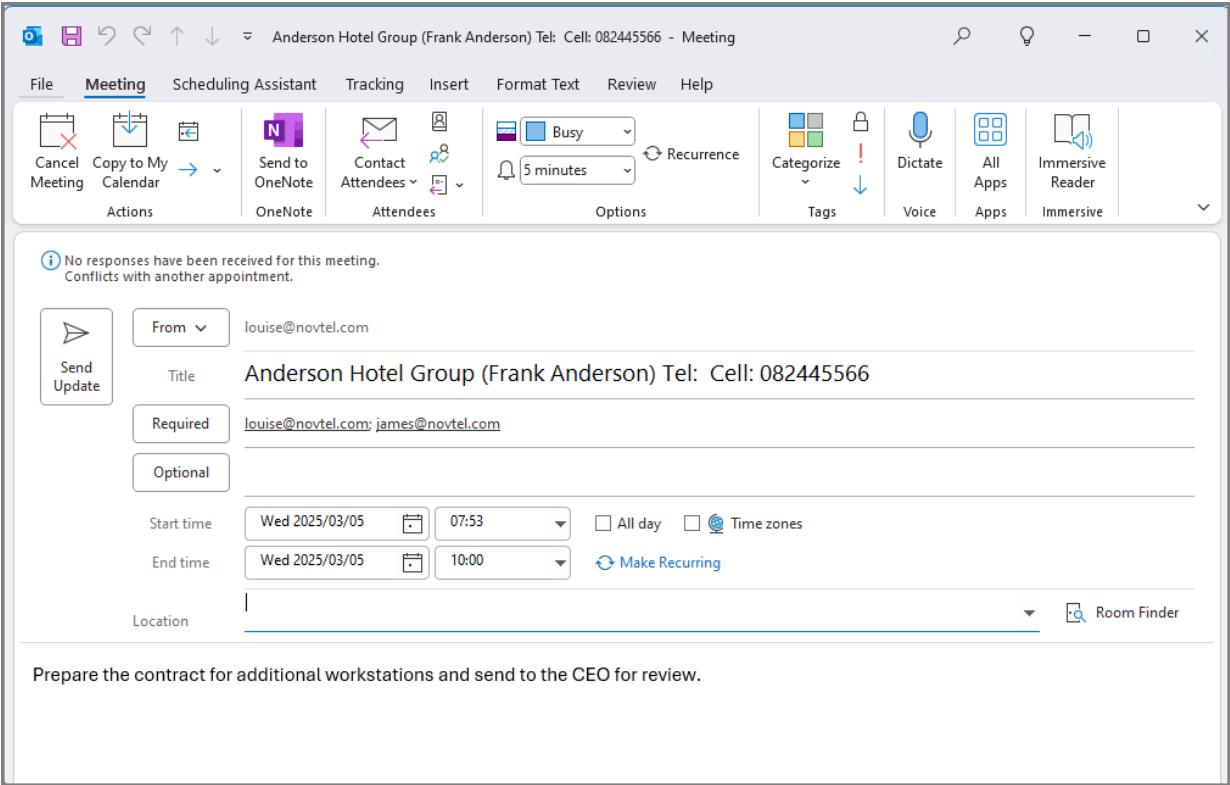
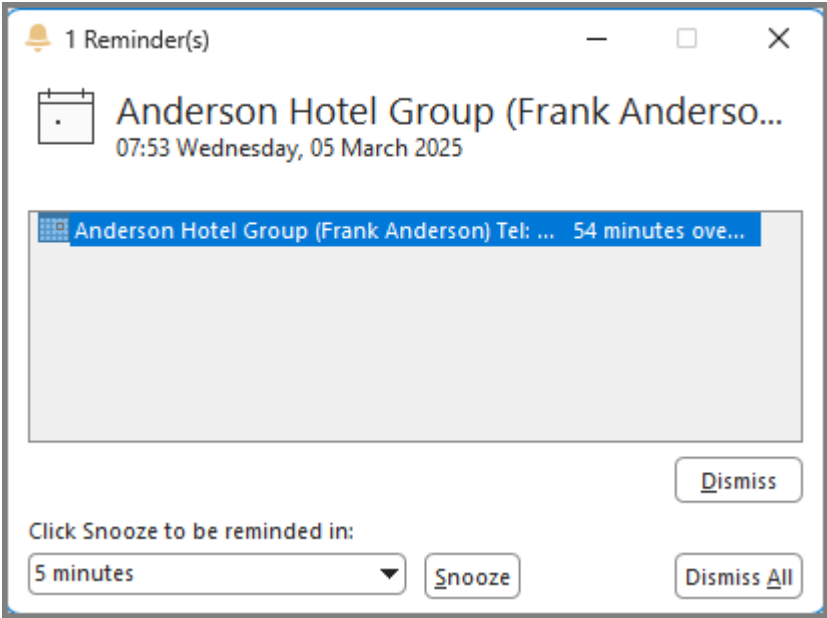
The task is now displayed under the User's List of Tasks.

 Novtel®

Page 72

The Scheduling System

The Outlook reminder will is displayed as follows:



The Scheduling System

Novtel Relations Management

File Edit Settings

EMAIL

SCHEDULE

OUTLOOK

Calendar

DASHBOARD

REFRESH

Scheduled Tasks

Task Editor

Instruction From Staff: Louise

Person:

Contact Person:

Cell: Tel:

Detailed Task Instruction:

☐ Send user an email

Add Edit Delete

Active Users: 1

James West (1/3) Open

Louise JvV (4/9) Open

Ruan Hamman (0/1) Open

Wendy Harris (0/2) Open

When the task is completed by the User, they will proceed to click on the 'Schedule' icon and select his or her Username to display the tasks assigned to them.

Clicking on the specific task to be marked as completed, the details will be displayed as captured, and the 'Edit' button is to be selected.

Scheduled Tasks

Task Editor

Instruction From Staff: Louise Requested By: James West ☒ Uncompleted and Remind User

Person: Anderson Hotel Group Remind Date: 2025/03/06

Contact Person: Frank Anderson Time Start: 7:44

Cell: 082445566 Tel: Time End: 10:00

Detailed Task Instruction: Prepare the contract for additional workstations and send to the CEO for review. Notes On Completed Task:

☐ Send user an email

Add Edit Delete

Tasks Document Info Below

Document Type:

Subject:

Note at capture:

Correspondence Number:

View Tasks

Code	Description	Completed/Note
5	Arrange Relations Demo	
6	Send quote for repairs	
7	Send quote for repairs	Quote Sent
8	Please send quotation on Property and Relations Management Software. Integrated with Sage Pastel Partner, and for 10 Users each.	Quote Sent and got a reply already that
10	Please send quotation on Property and Relations Management Software. Integrated with Sage Pastel Partner, and for 10 Users each.	Quote was sent successfully.
11	Please contact Erica for a demonstration on our Relations Mobile App.	Demo went well, and the client will con
12		
18	Please issue a quotation ASAP for Novtel Relations Management.	
19	Prepare the contract for additional workstations and send to the CEO for review.	

Refresh Close

The Scheduling System

Scheduled Tasks

Task Editor

Instruction From Staff: Requested By: ☒ Uncompleted and Remind User

Person:

Remind Date:

Contact Person:

Time Start:

Cell: Tel:

Time End:

Detailed Task Instruction:

Notes On Completed Task:

☐ Send user an email

We have changed the end time of the task to the exact day and time the task was completed, and entered the details of how the task was completed.

Scheduled Tasks

Task Editor

Instruction From Staff: Requested By: ☐ Uncompleted and Remind User

Person:

Contact Person:

Cell: Tel:

Detailed Task Instruction:

Notes On Completed Task:

☐ Send user an email

View Tasks

Active Users: 1 | Code | Description

The 'Uncompleted and Remind User' checkbox is now unticked, and the action saved.

The Scheduling System

Scheduled Tasks

Task Editor

Instruction From Staff: Requested By: ☒ Uncompleted and Remind User

Person:

Contact Person:

Cell: Tel:

Detailed Task Instruction:

Notes On Completed Task:

☐ Send user an email

Tasks Document Info Below

Document Type:

Subject:

Note at capture:

Correspondence Number:

View Tasks

Active Users: 1

James West (1/3) Open

Louise JvV (3/9) Open

Ruan Hamman (0/1) Open

Wendy Harris (0/2) Open

Code	Description	CompletedNote
5	Arrange Relations Demo	
6	Send quote for repairs	
7	Send quote for repairs	Quote Sent
8	Please send quotation on Property and Relations Management Software.Integrated with Sage Pastel Partner, and for 10 Users each.	Quote Sent and got a reply already that
10	Please send quotation on Property and Relations Management Software.Integrated with Sage Pastel Partner, and for 10 Users each.	Quote was sent successfully.
11	Please contact Erica for a demonstration on our Relations Mobile App.	Demo went well, and the client will con
12		
18	Please issue a quotation ASAP for Novtel Relations Management.	
19	Prepare the contract for additional workstations and send to the CEO for review.	The Contract was sent, and the CEO h

The captured ‘Note on Completed Task’ is now displayed in the ‘CompletedNote’ column for this task.

The time set when the task was completed, is captured here too.

View Tasks

Active Users: 1

James West (1/3) Open

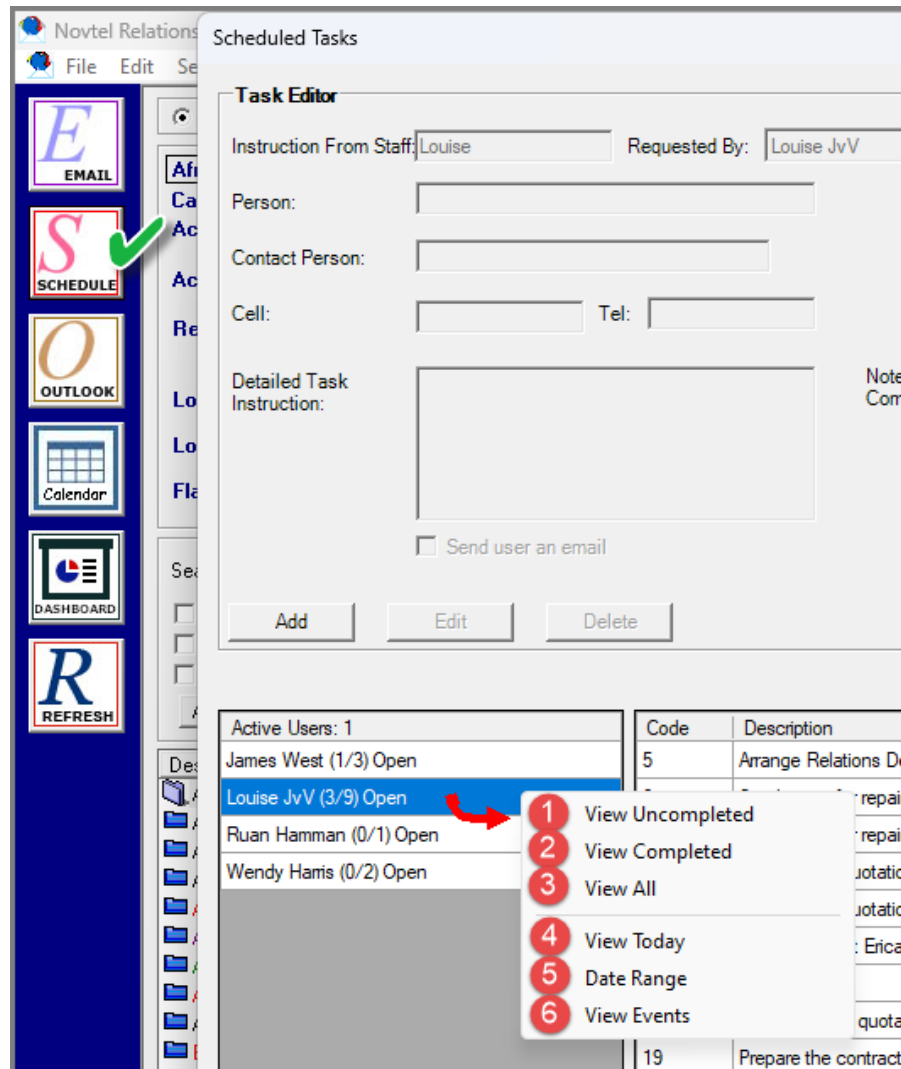
Louise JvV (3/9) Open

Ruan Hamman (0/1) Open

Wendy Harris (0/2) Open

	Date	Uncompleted	CustSupp	DocNum	TimeStart	TimeEnd	Originated	RequestedBy
	2020/08/13	Yes	Ingrid	0	08:00:00	09:00:00	James	Louise
	2021/11/29	Yes	Anderson, Peter	0	10:17:00	12:00:00		
	2021/11/29	No	Anderson, Peter	0	10:17:00	11:00:00		
that it is accepted.	2021/12/02	No	Anderson, Holdings	0	08:30:00	11:00:00		Kevin
	2021/12/16	No	Express Properties	0	08:20:00	10:05:00		James
contact us for further arrangements.	2021/12/22	No	Express Properties	0	12:45:00	02:30:00		Louise
	2021/12/22	Yes	Andrews, Shawn	84	01:00:00	03:00:00		Wendy
	2023/04/18	No	The Anchor Restaurant	0	07:34:00	07:34:00	Ruan	Louise
O has been phoned to check his emails	2025/03/05	No	Anderson Hotel Group	0	07:44:00	09:32:00	Louise	Louise

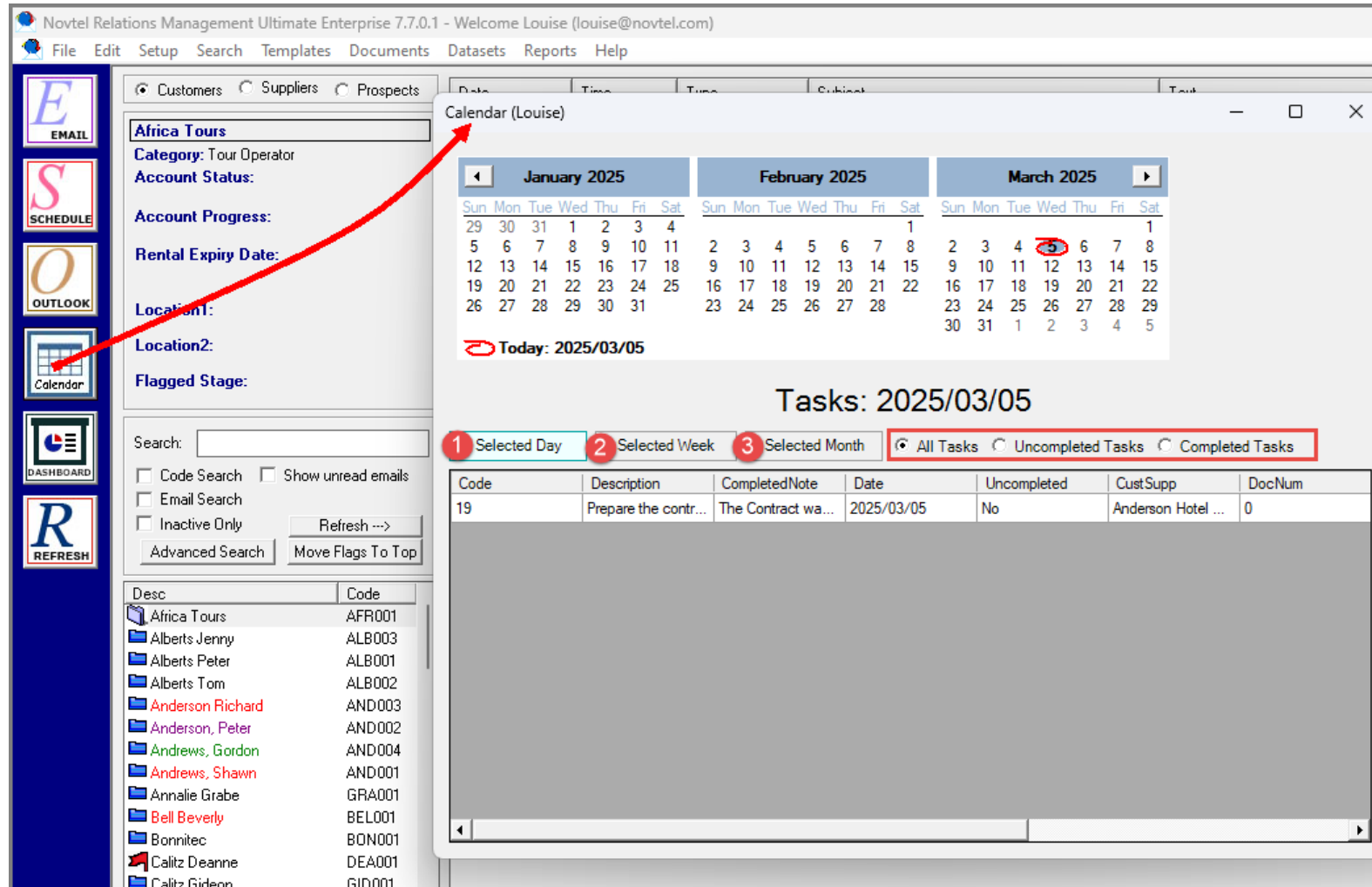
The Scheduling System



Clicking on the 'Schedule' button, a specific User can be right-clicked, and the following options are available for selection per User:

1. Selecting the 'View Uncompleted' option, all uncompleted tasks are listed.
2. Only completed tasks will be displayed for the selected User if this option is selected.
3. All tasks – completed and uncompleted – will be listed when the 'View All' option is selected.
4. Tasks for the current day can be viewed by selecting this option.
5. A date range can be specified with this option selected, and tasks for the period will be displayed.
6. The 'View Events' option gives access to the User's Calendar.

The Scheduling System



Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

Africa Tours
Category: Tour Operator
Account Status:
Account Progress:
Rental Expiry Date:
Location1:
Location2:
Flagged Stage:

Search:
☐ Code Search ☐ Show unread emails
☐ Email Search
☐ Inactive Only
Refresh --->
Advanced Search Move Flags To Top

Desc Code

- Africa Tours AFR001
- Alberts Jenny ALB003
- Alberts Peter ALB001
- Alberts Tom ALB002
- Anderson Richard AND003
- Anderson, Peter AND002
- Andrews, Gordon AND004
- Andrews, Shawn AND001
- Annalie Grabe GRA001
- Bell Beverly BEL001
- Bonnitec BON001
- Calitz Deanne DEA001
- Calitz Gideon GID001

Calendar (Louise)

January 2025 February 2025 March 2025

Sun Mon Tue Wed Thu Fri Sat

29 30 31 1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31

Today: 2025/03/05

Tasks: 2025/03/05

1 Selected Day 2 Selected Week 3 Selected Month ☒ All Tasks ☐ Uncompleted Tasks ☐ Completed Tasks

Code	Description	CompletedNote	Date	Uncompleted	CustSupp	DocNum
19	Prepare the contr...	The Contract wa...	2025/03/05	No	Anderson Hotel ...	0

The logged in User can access his or her own calendar by simply clicking on the 'Calendar' icon.

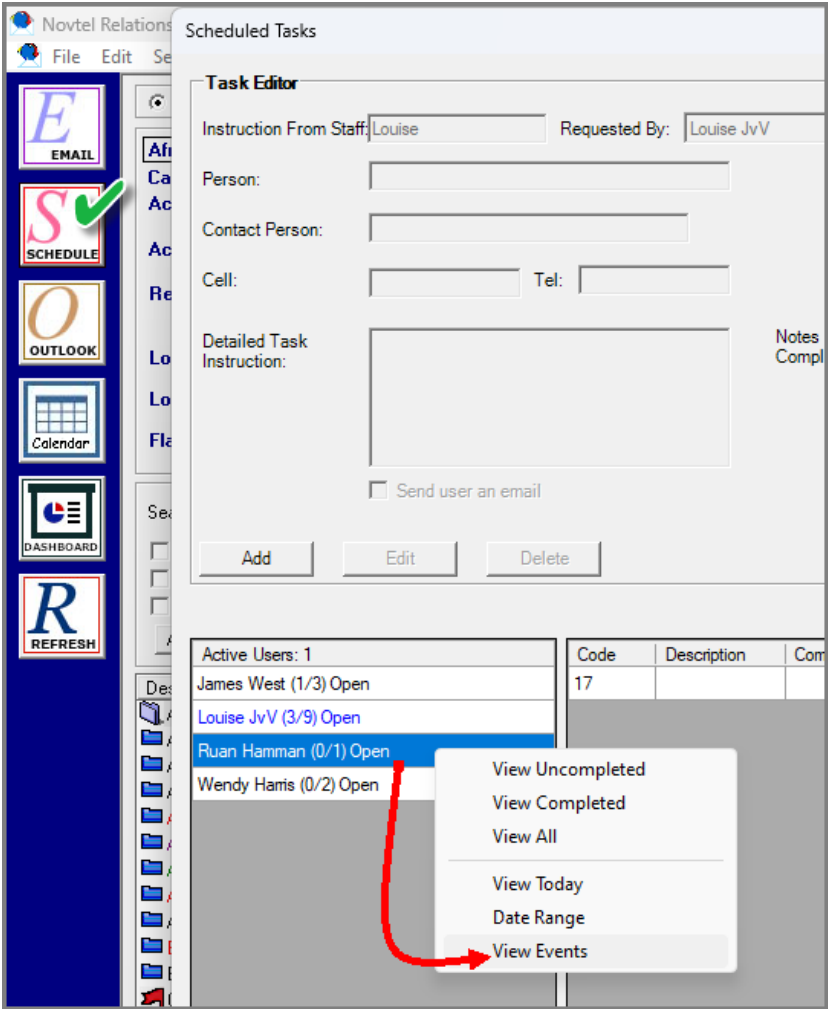
This User will be able to view his or her own tasks here for a:

1. Selected day;
2. Selected week;
3. Or selected month.

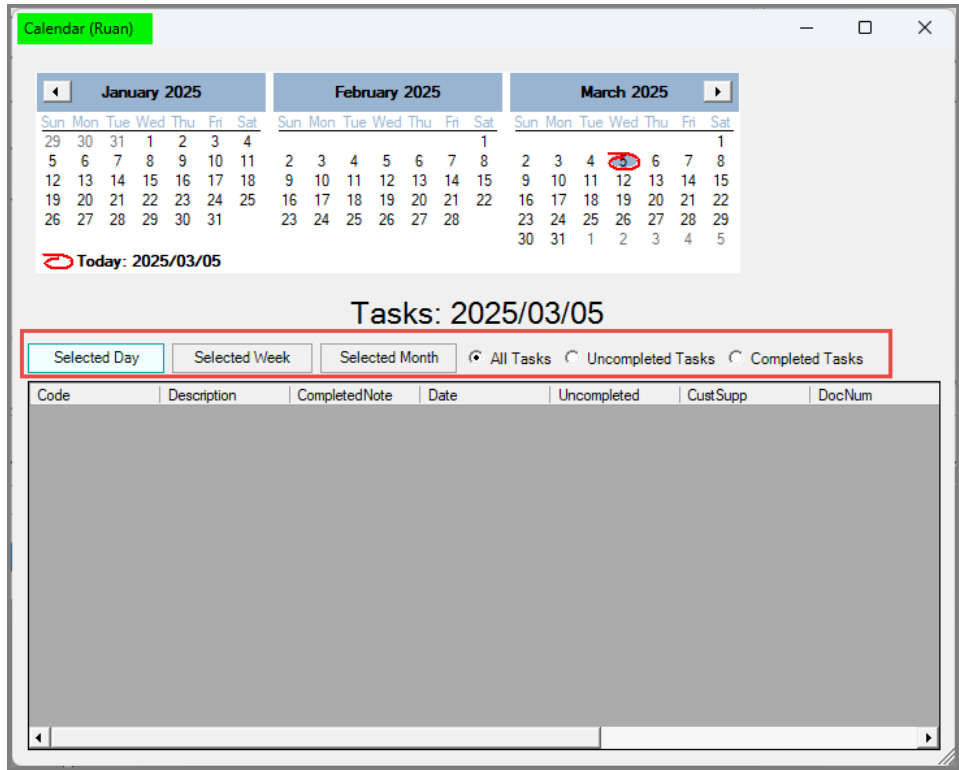
The User can also view:

- ✓ All his or her tasks (Completed and Uncompleted);
- ✓ Uncompleted Tasks ONLY;
- ✓ Completed Tasks ONLY.

The Scheduling System



To view tasks for other Users, and access their Calendars too, the 'Schedule' icon is clicked; The required User is right-clicked, and the 'View Events' option selected.



The selected User's name is displayed at the top of the Calendar window, and all tasks; only completed tasks, or only uncompleted tasks for this person can be viewed for the selected day, week or month.



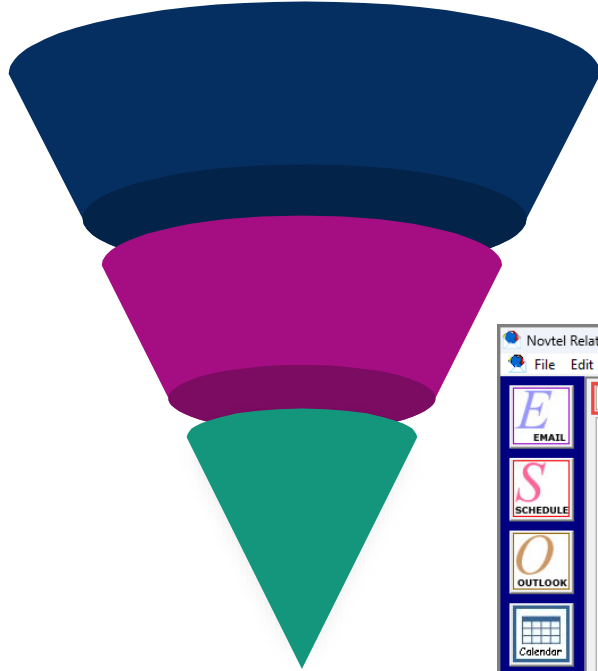
Novtel[®]

Relations Management

8

Search and Filtering Options

Search and Filtering Options



Novtel Relations Management has powerful filtering capabilities, allowing you to group customers, suppliers, and prospects - customized according to your company's needs.

Novtel Relations Management Ultimate Enterprise 7.7.0.1 - Welcome Louise (louise@novtel.com)

File Edit Setup Search Templates Documents Datasets Reports Help

Customers Suppliers Prospects

Africa Tours

Category: Tour Operator

Account Status:

Account Progress:

Rental Expiry Date:

Location1:

Location2:

Flagged Stage:

Search:

☒ Code Search ☐ Show unread emails

☐ Email Search

☐ Inactive Only

Refresh -->

Advanced Search Move Flags To Top

Desc	Code
Africa Tours	AFR001
Alberts Peter	ALB001
Alberts Tom	ALB002
Alberts Jenny	ALB003
Andrews, Shawn	AND001
Anderson, Peter	AND002
Anderson Richard	AND003
Andrews, Gordon	AND004
Bell Beverly	BEL001
Bonnitec	BON001
Carstens Kevin	CAR001
Cash Sales	CAS001
Cash Sales	CAS002
Cash Sales	CAS003

Created By: ALL

Customer Category: ALL

Location1: ALL

Location2: ALL

Account Status: ALL

Account Progress: ALL

Rental Expiry Date: ALL

Flagged User: ALL

Flagged Priority: ALL

Flagged Stage: ALL

Flagged Selection: ALL

Activities: ALL

Clear All Searches Search >>

Previous Search Parameters

Created By: ALL

Customer Category: ALL

Location1: ALL

Location2: ALL

Account Status: ALL

Account Progress: ALL

Rental Expiry Date: ALL

Previous Date: 2025/02/20 07:35:15

Flagged User: ALL

Flagged Priority: Low Priority

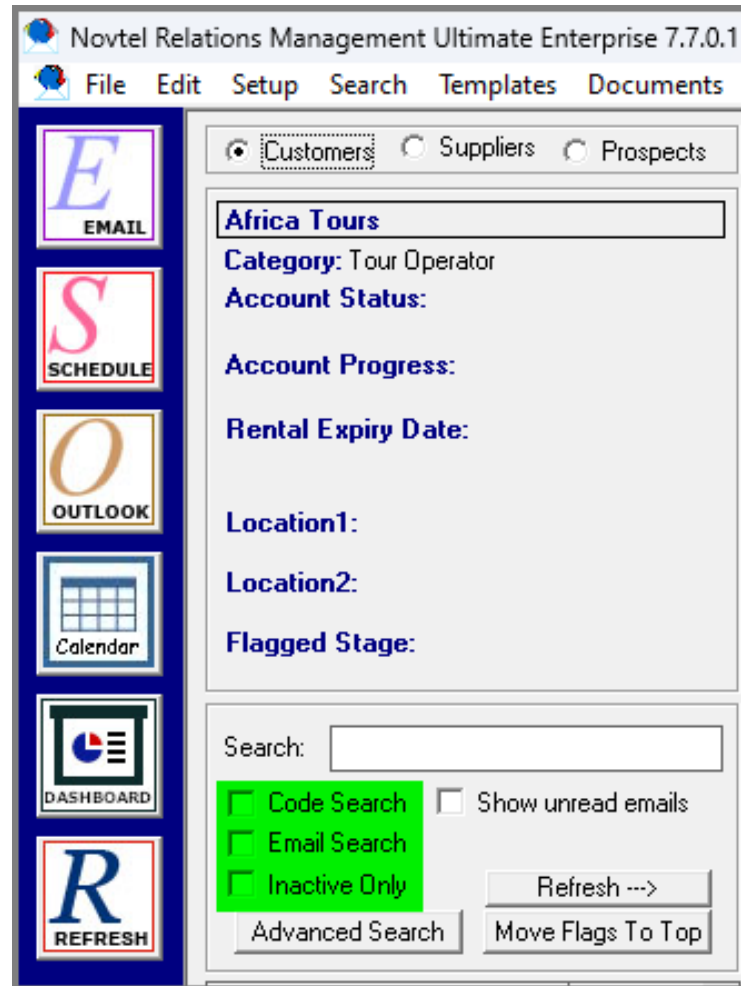
Per Customer, Supplier or Prospect Heading, **Advanced searches** can be performed to **filter Accounts** linked to the same:

- Status;
- Category;
- Location;
- Flagged User,
- Flagged Priority and / or Stages;
- or Activities

for the purpose of grouping them together to send a bulk email and/or SMS to all Accounts simultaneously.

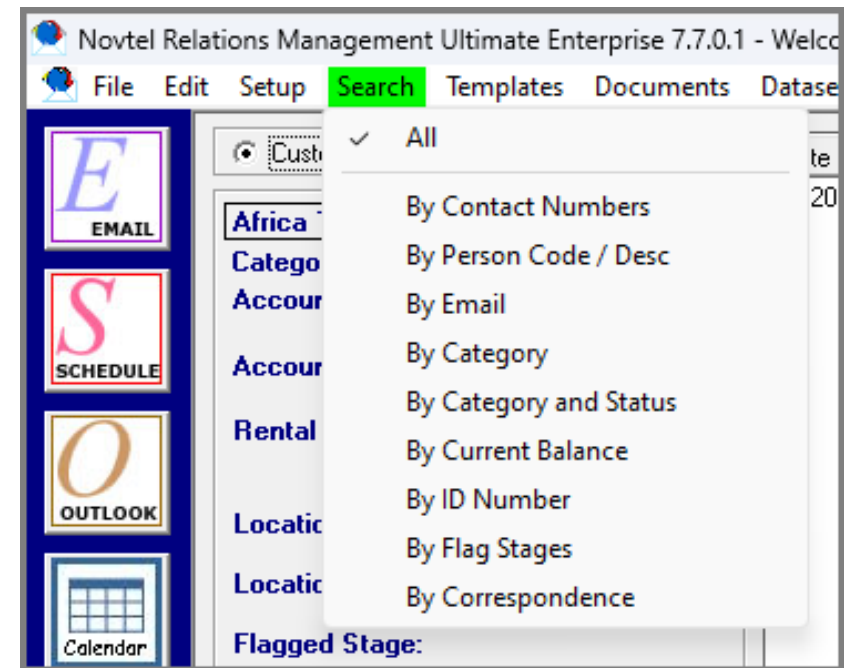
Please note that the more search criteria options are set, the more the specifically required accounts will be filtered.

Search and Filtering Options



In addition to the 'Advanced Search' options, these search options can also be utilized:

- Quick Search Options for an Account Code; Email Address or Inactive Accounts ONLY;
- And Search options available from the 'Search Menu'.





Relations Management

9

The Retirement Home Waiting List Functionality

The Retirement Home Waiting List Functionality

The screenshot shows a software window titled "Edit Prospect Details". It contains several input fields and sections:

- Code:** VAN003, with a checked box for "Use Account AutoNumber".
- Category:** 6 - RH - Self Sufficient.
- Location 1:** and **Location 2:** dropdown menus.
- General Information:**
 - Id Number:** 514545787896
 - Name:** van Rooyen, Ansie
 - Telephone:** 044 695 11223
 - Mobile Phone:** 083 222555
 - Email Address:** ansie@vanrooyen.co.za
 - Website:** (empty) with a ">>" button.
 - Fax:** (empty)
 - First Contact:** 2023/01/06
- Address:**
 - Address: Karoostraat 45
 - Mosselbaai
 - 6500
 - Coordinates: (empty) with a "View" button.
- Email / Sms Options:**
 - ☒ Company Only
 - ☐ Contact Persons Only
 - ☐ Company and Contact Persons
- Buttons:** "Accept" and "Cancel" at the bottom right.
- Navigation:** On the bottom left, there are icons for "Contact persons with company", "Company Activities", and "Waiting List". The "Waiting List" button is highlighted with a red rectangular box.
- Other:** An "Inactive" checkbox is at the bottom left.

The Retirement Home Waiting List Functionality was developed for a specific Novtel Customer.

This functionality entails the following steps:

1. The 'Retirement Home' system must be activated;
2. Deposit Amounts must be set up;
3. The current year, or year during which the Prospective Resident could wish to take occupancy;
4. All Applicable 'Zone' and Accommodation Types available in the retirement village.
5. Prospect Master Files are to be created and the waiting list details captured per prospective resident.

The Retirement Home Waiting List Functionality

Zones and Types can be illustrated as follow:



The Retirement Home Waiting List Functionality

When the Waiting List Details are captured on a Prospect's Master File, and a specific zone is selected, the types captured under this zone will be available for selection.

Waiting List Selection

Serial No: 10Sort No: 8

Deposit:

Year:

Zone: Section 1

Zone Type:

☐ Garage

Bachelor Unit

1 Bedroom Unit

Accept

Cancel

Waiting List Selection

Serial No: 10Sort No: 8

Deposit:

Year:

Zone: Section 3

Zone Type:

☐ Garage

Frail Care

Withdrawn

Refundable

Accept

Cancel

Waiting List Selection

Serial No: 10Sort No: 8

Deposit:

Year:

Zone: Section 5

Zone Type:

☐ Garage

1 Bedroom Unit

2 Bedroom Unit

Accept

Cancel

The Retirement Home Waiting List Functionality

Depending on the Zone and Unit Size, the Deposit Amount may differ, and therefore all applicable deposit settings will be pre-set up for selection on the Prospect's Waiting List Details screen.

For Example:

Section 1 and 2 Amounts

- **Batchelor Unit**
R 1000.00
- **1 Bedroom Unit**
R 2 000.00

Section 3 Amount

- **Frail Care**
R 3000.00

Section 4 and 5 Amount

- **1 Bedroom Unit**
R 3 000.00
- **2 Bedroom Unit**
R 4 000.00

The pre-created amounts will be available for selection on the Prospect's 'Waiting List Selection' screen.

Waiting List Selection

Serial No: 10

Sort No: 8

Deposit:

1000.00

2000.00

3000.00

4000.00

Year:

Zone:

Zone Type:

☐ Garage

☐ Withdrawn

☐ Refundable

Accept

Cancel

The Retirement Home Waiting List Functionality

It might happen that prospective residents will request to be placed on the waiting list for a specific year in the future since they are not yet ready to move in.

These years will therefore be created far in advance to accommodate most requests at present. However: more years can continually be created as needed.

Waiting List Selection

Serial No: 10 Sort No: 8

Deposit: [dropdown]

Year: [dropdown]

Zone: [dropdown]

Zone Type: [dropdown]

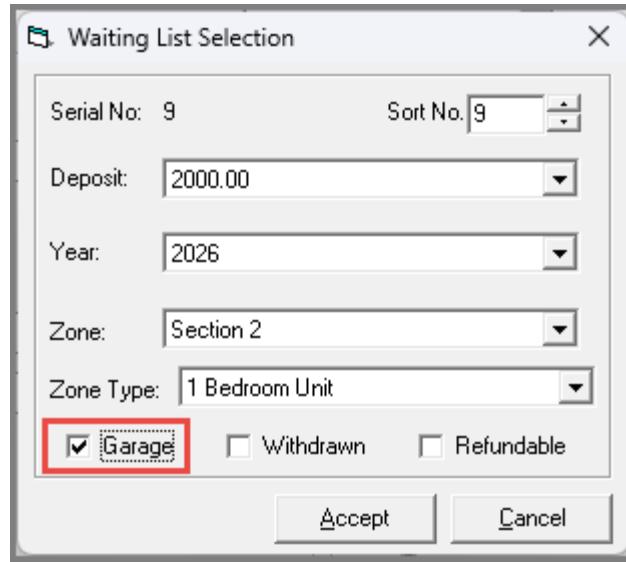
☐ Garag

2020
2021
2022
2023
2024
2025
2026
2027

Accept Cancel

The years will now also be available for selection on the Prospect’s ‘Waiting List Selection’ screen.

The Retirement Home Waiting List Functionality



Waiting List Selection

Serial No: 9 Sort No: 9

Deposit: 2000.00

Year: 2026

Zone: Section 2

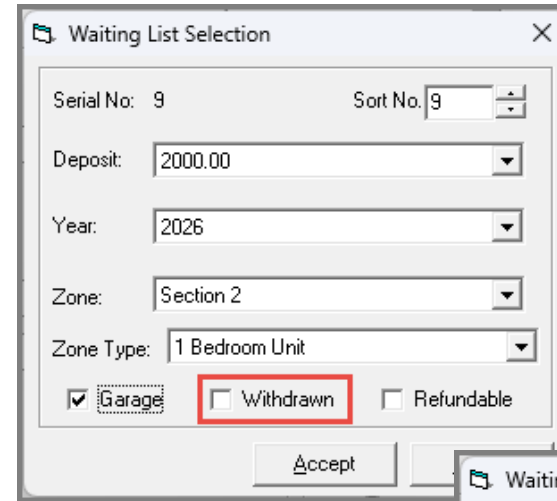
Zone Type: 1 Bedroom Unit

☒ Garage ☐ Withdrawn ☐ Refundable

Accept Cancel

If a Garage is required, this option is selected.

If not, the checkbox is left unticked.



Waiting List Selection

Serial No: 9 Sort No: 9

Deposit: 2000.00

Year: 2026

Zone: Section 2

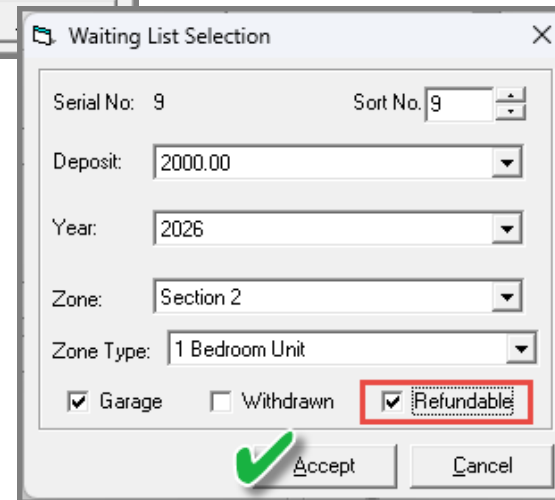
Zone Type: 1 Bedroom Unit

☒ Garage ☐ Withdrawn ☐ Refundable

Accept Cancel

By default, the 'Withdrawn' checkbox will never be selected when the Waiting List settings are applied originally.

However: In the future – and if necessary – this checkbox can be ticked to withdraw the Prospect from the waiting list.



Waiting List Selection

Serial No: 9 Sort No: 9

Deposit: 2000.00

Year: 2026

Zone: Section 2

Zone Type: 1 Bedroom Unit

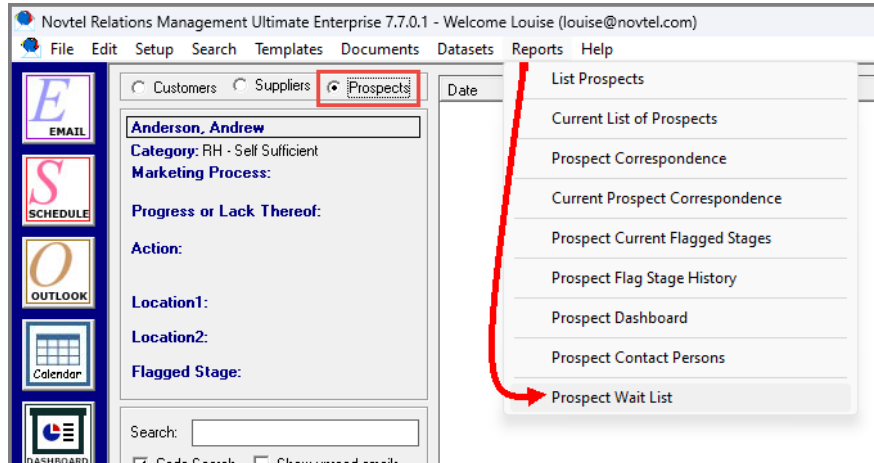
☒ Garage ☐ Withdrawn ☒ Refundable

Accept Cancel

If the Deposit amount is to be refunded to the Prospect in the future, the 'Refundable' option is selected.

If not, the checkbox is left unticked.
To save the settings, click 'Accept'.

The Retirement Home Waiting List Functionality



The 'Wait List Report' can be produced from the 'Prospects Report' menu option.

The report is opened in Microsoft Excel, and the following details are displayed:

1. ID and Serial Number Columns

The ID and Serial numbers will always be constant and equal when Prospects are created manually, and the numbers cannot be altered. These numbers are automatically allocated by Novtel as Prospects are created.

2. Code and Description Columns

The Account Code and Description for each Prospect is displayed in these 2 columns.

3. Category Column

The 'Category' selected on the Prospect's master file will be indicated here.

4. Mobile Number; Telephone Number and Email Columns

The contact details for each account are indicated in these 3 columns.

AutoSave Off Book1 - Excel

File Home Insert Page Layout Formulas Data Review View Developer BI Tools

Clipboard Font Alignment Number

A1 : X ✓ fx Prospect Wait List

Prospect Wait List
Date and Time report printed : 26/02/2025 10:13:57

ID	Serial	Code	Description	Category	MobileNum	TelNum	Email	FirstContact
1	1	VAN001	Van der Merwe, Jan	RH - Self Sufficient	084 123456	011 456123	jan@vdm.com	2025-02-05
2	2	AND001	Anderson, Andrew	RH - Self Sufficient	086 232323	044 695124	andrew@anderson.com	2025-02-05
3	3	FRE001	Fredericks, Paul	RH - Self Sufficient	082 564123	044 6200011	paul@fredericks.com	2025-02-05
4	4	GRE001	Greeff, Janet	RH - Self Sufficient	085 124578	044 695121	janet@greeff.com	2025-02-05
5	5	MAL001	Malan, Liza	Frail Care	083326566	044789654	liza@malan.com	2025-02-05
6	6	PRE001	Pretorius, Koos	RH - Self Sufficient	082 454545	044 652314	koos@pretorius.com	2025-02-05
7	7	SMS001	Southport Medical Supplies	Equipment Hire	081 123654	021 123654	Southport@medicalSupplies.com	2025-02-25
8	8	VAN002	van Rensburg, Walter	RH - Self Sufficient	082 451245	044 690 1245	walter@vanRensburg.com	2025-02-25
9	9	VAN003	van Rooyen, Ansie	RH - Self Sufficient	083 222555	044 695 11223	ansie@vanrooyen.co.za	2025-02-26

The Retirement Home Waiting List Functionality

J	K	L	M
Deposit	Zone	ZoneType	Garage
R 4 000.00	Section 5	2 Bedroom Unit	Yes
R 1 000.00	Section 1	Bachelor Unit	Yes
R 2 000.00	Section 2	1 Bedroom Unit	Yes
R 2 000.00	Section 4	1 Bedroom Unit	Yes
R 3 000.00	Section 3	Frail Care	No
R 1 000.00	Section 4	2 Bedroom Unit	Yes
			No
R 2 000.00	Section 2	1 Bedroom Unit	Yes
R 2 000.00	Section 2	1 Bedroom Unit	Yes

Deposit Column

Per account, a pre-created Deposit amount can be selected, and will be displayed on the report accordingly.

Zone and Zone Type Columns

A specific Zone is selected per account, and the required Zone Type is set accordingly. The selected details are displayed per line on the report.

Garage Column

If the 'Garage' option was selected per Account, the wording will be displayed as 'Yes'.

If not selected, the wording is 'No'.

The Retirement Home Waiting List Functionality

N O P Q				
Year	Active	Withdrawn	Refundable	\$
2025	Yes	No	Yes	
2026	No	No	Yes	
2025	Yes	No	No	
2026	No	No	No	
2026	No	No	No	
2027	No	No	Yes	
		No	No	
2026	No	No	Yes	
2026	No	No	Yes	

Year and Active Columns

If the 'Year' was selected on the account as either the current year, or prior to the current year, the 'Active' column will display the wording: 'Yes'.

For all future years, the 'Active' column will display the wording as 'No'.

Withdrawn Column

By default, the 'Withdrawn' checkbox will not be selected on an account – unless the waiting list application is indeed withdrawn by the Prospect.

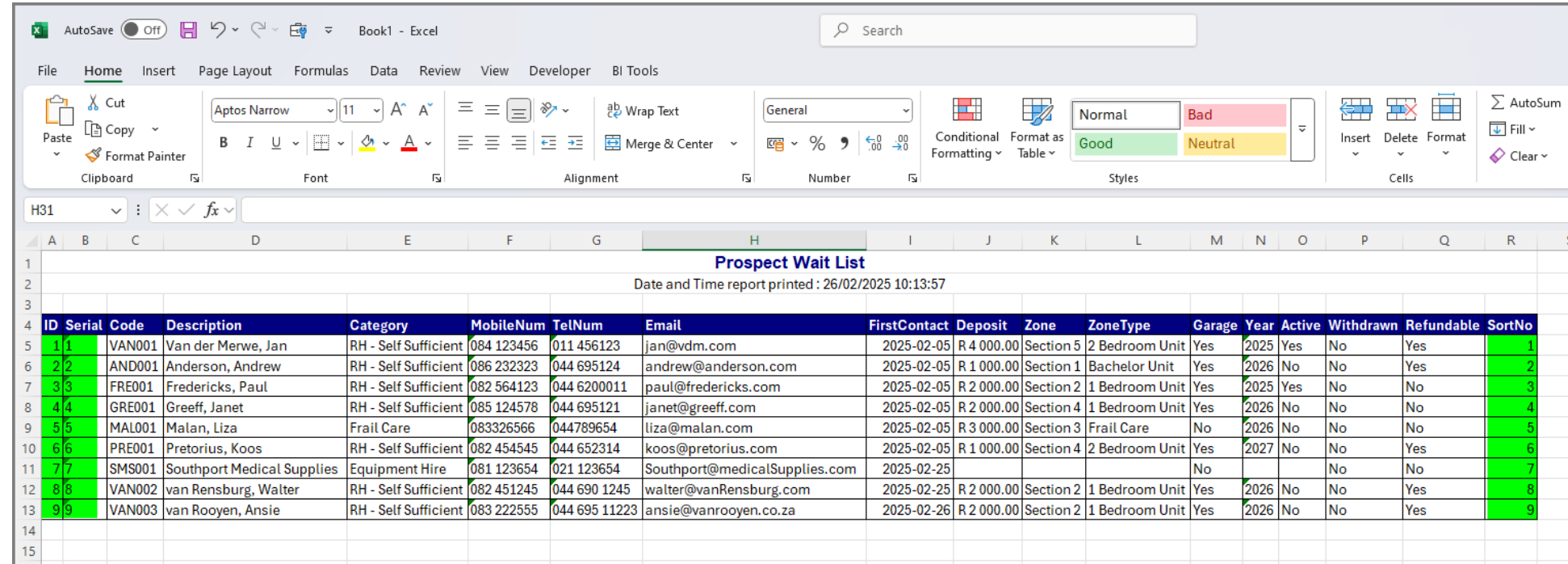
- ☐ If unticked, the wording is: 'No'.
- ☒ If ticked, it is 'Yes'. (In this case, the Prospect's account can be deleted **if required** – which will remove them from the waiting list.)

Refundable Column

If a Deposit is payable, it may either be refundable to the Prospect, or not.

- ☒ If the 'Refundable' checkbox on the account is selected, the wording on the report is 'Yes'.
- ☐ If unticked, it is 'No'.

The Retirement Home Waiting List Functionality



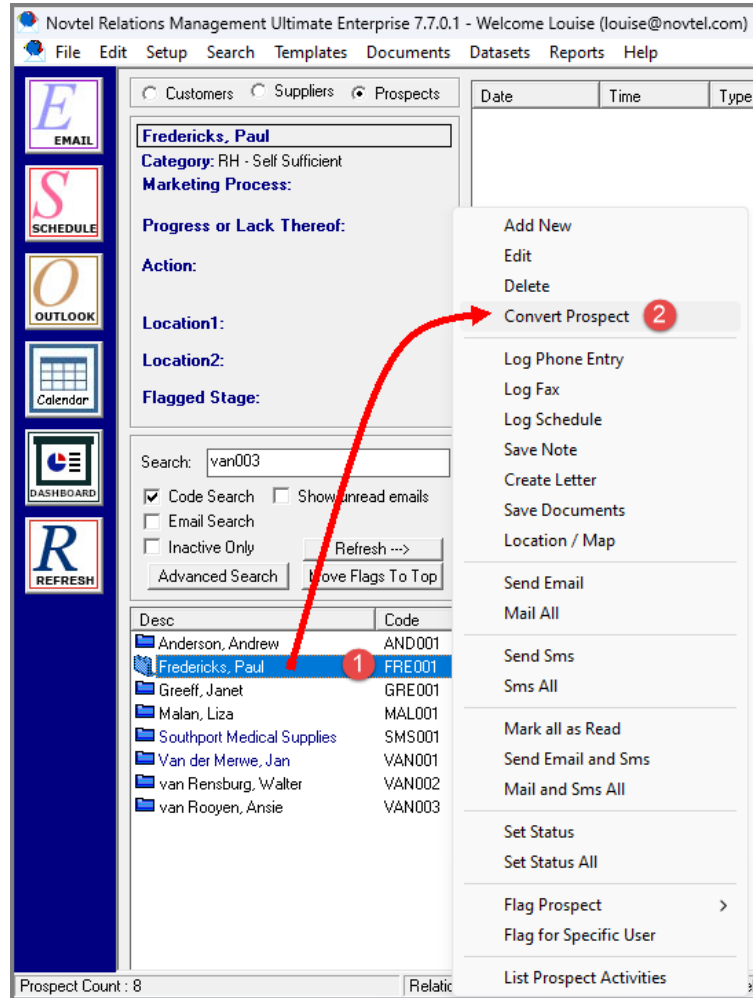
ID	Serial	Code	Description	Category	MobileNum	TelNum	Email	FirstContact	Deposit	Zone	ZoneType	Garage	Year	Active	Withdrawn	Refundable	SortNo
1	1	VAN001	Van der Merwe, Jan	RH - Self Sufficient	084 123456	011 456123	jan@vdm.com	2025-02-05	R 4 000.00	Section 5	2 Bedroom Unit	Yes	2025	Yes	No	Yes	1
2	2	AND001	Anderson, Andrew	RH - Self Sufficient	086 232323	044 695124	andrew@anderson.com	2025-02-05	R 1 000.00	Section 1	Bachelor Unit	Yes	2026	No	No	Yes	2
3	3	FRE001	Fredericks, Paul	RH - Self Sufficient	082 564123	044 620011	paul@fredericks.com	2025-02-05	R 2 000.00	Section 2	1 Bedroom Unit	Yes	2025	Yes	No	No	3
4	4	GRE001	Greeff, Janet	RH - Self Sufficient	085 124578	044 695121	janet@greeff.com	2025-02-05	R 2 000.00	Section 4	1 Bedroom Unit	Yes	2026	No	No	No	4
5	5	MAL001	Malan, Liza	Frail Care	083326566	044789654	liza@malan.com	2025-02-05	R 3 000.00	Section 3	Frail Care	No	2026	No	No	No	5
6	6	PRE001	Pretorius, Koos	RH - Self Sufficient	082 454545	044 652314	koos@pretorius.com	2025-02-05	R 1 000.00	Section 4	2 Bedroom Unit	Yes	2027	No	No	Yes	6
7	7	SMS001	Southport Medical Supplies	Equipment Hire	081 123654	021 123654	Southport@medicalSupplies.com	2025-02-25				No			No	No	7
8	8	VAN002	van Rensburg, Walter	RH - Self Sufficient	082 451245	044 690 1245	walter@vanRensburg.com	2025-02-25	R 2 000.00	Section 2	1 Bedroom Unit	Yes	2026	No	No	Yes	8
9	9	VAN003	van Rooyen, Ansie	RH - Self Sufficient	083 222555	044 695 11223	ansie@vanrooyen.co.za	2025-02-26	R 2 000.00	Section 2	1 Bedroom Unit	Yes	2026	No	No	Yes	9

The ID, Serial Number and Sort Order numbers will always correspond, provided that:

- The 'Sort Order' was not altered on an account,
- Prospect Accounts have not been deleted,
- And no Prospect has yet been converted to a Customer.

However: The sort order can be changed manually if required.

The Retirement Home Waiting List Functionality

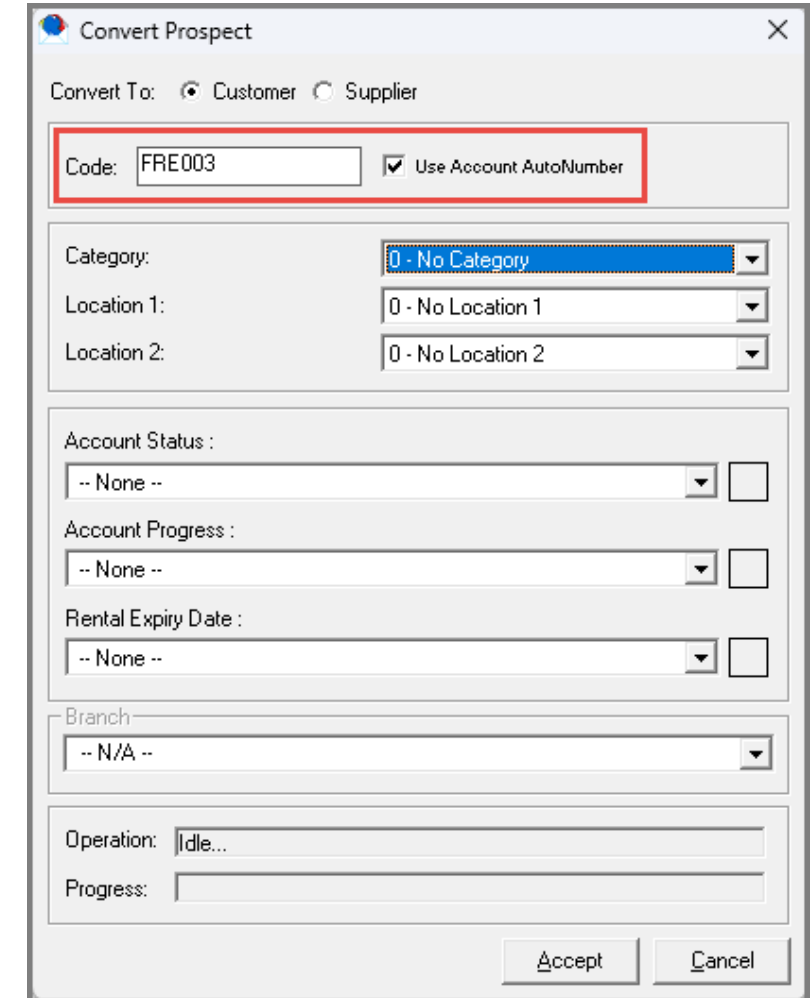


1. **Please Note:** Currently, the Prospect's code is indicated as 'FRE001'.

This code will change when converted to a Customer if Novtel finds that the same Customer Code already exists.

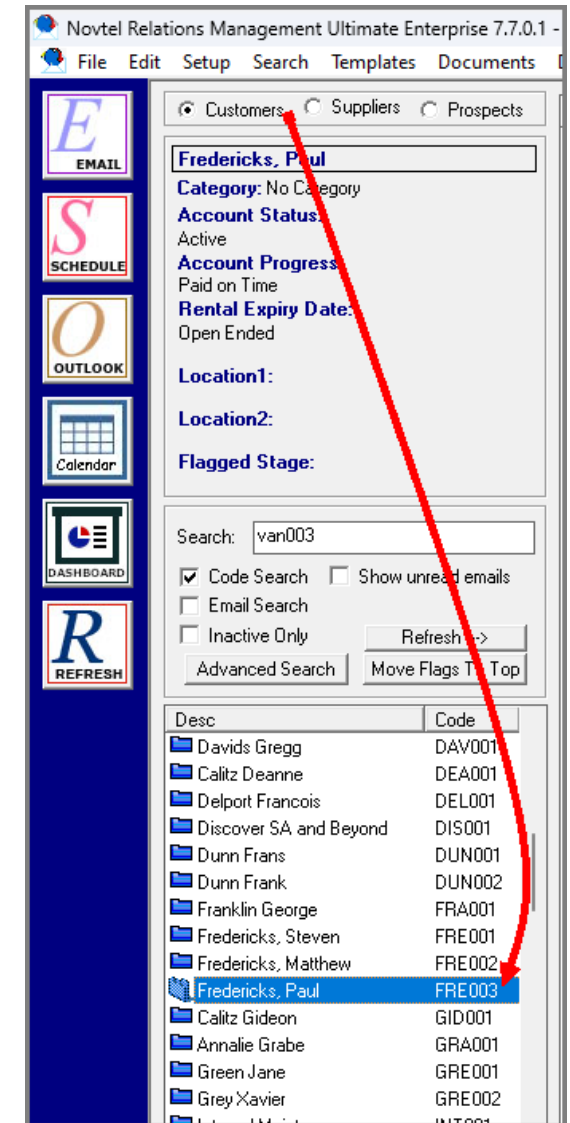
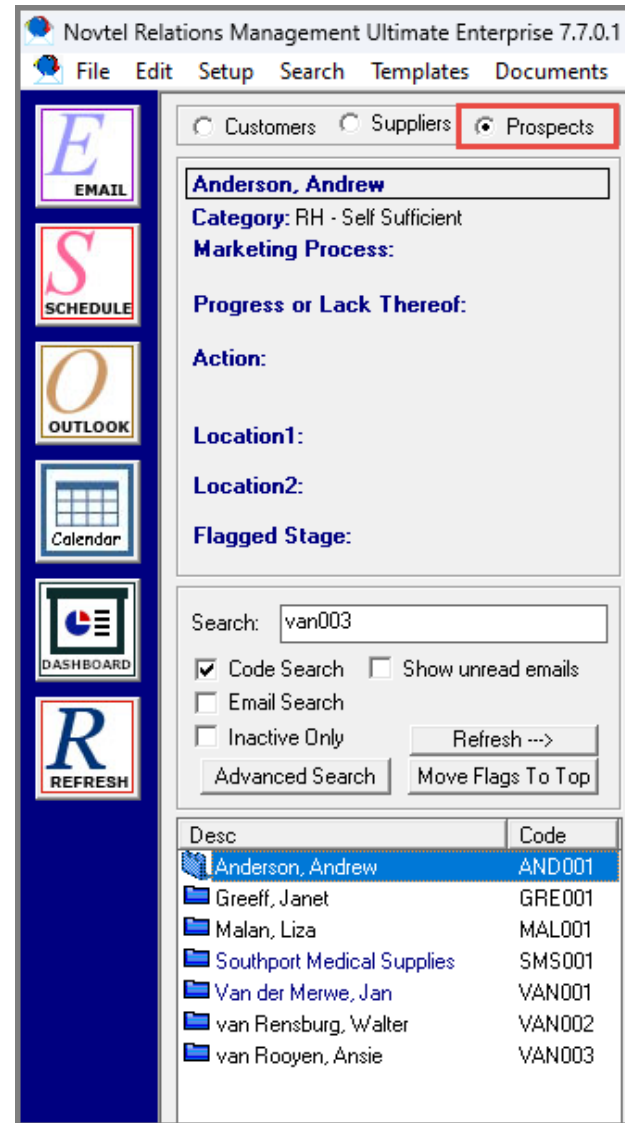
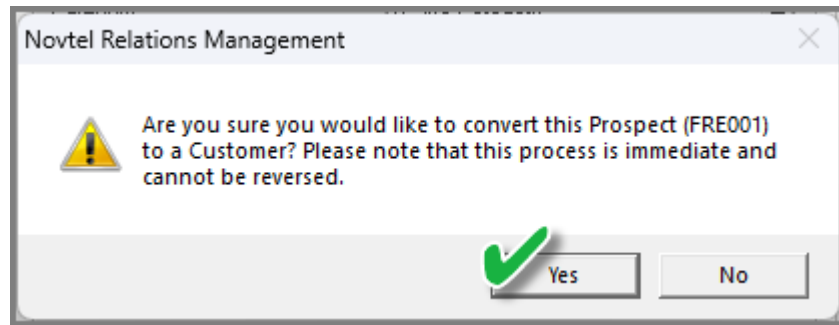
2. Right-clicking on the Prospect account and selecting the 'Convert Prospect' option, Novtel has checked for, and inserted the next available Customer Account Code as 'FRE003' at the top of the window since Customer Codes FRE001 and FRE002 already exist.

The applicable Customer Category and Locations can now be selected; the applicable statuses set, and the changes saved.



The Retirement Home Waiting List Functionality

Clicking 'Yes' to confirm the action, the account is removed from the 'Prospects' list and displayed in the 'Customers' screen.



The Retirement Home Waiting List Functionality

The screenshot displays the 'Edit Customer Details' window with the following fields and options:

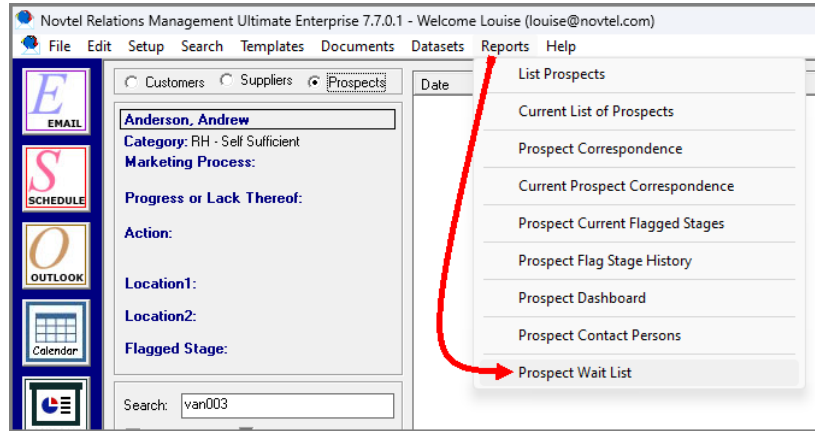
- Code: FRE003
- ☒ Use Account AutoNumber
- Category: 0 - No Category
- Location 1: [Empty]
- Location 2: [Empty]
- General Information section:
 - Id Number: 56124578
 - Name: Fredericks, Paul
 - Telephone: 044 6200011
 - Mobile Phone: 082 564123
 - Email Address: paul@fredericks.com
 - Website: [Empty] >>
 - Fax: [Empty]
 - First Contact: 2025/02/26
 - ☐ Inactive
 - ☐ Contact persons with company
 - ☐ Company Activities
 - ☒ Waiting List (indicated by a red arrow)
- Address: 89 Grootstraat

The 'Waiting List Selection' dialog box is open, showing the following details:

- Serial No: 3
- Deposit: 2000.00
- Year: 2025
- Zone: Section 2
- Zone Type: 1 Bedroom Unit
- ☒ Garage
- ☐ Withdrawn
- ☐ Refundable
- Buttons: Cancel, Accept, Cancel

Accessing the Customer Master File, the waiting list details can be accessed, but the sort order number has been removed since this Customer is no longer a Prospect active on the waiting list.

The Retirement Home Waiting List Functionality



The Prospect Waiting List now no longer displays the account linked to ID and Serial Number 3, since the Prospect was converted to a Customer.

The Sort Order for the accounts previously listed after the converted account, has been amended successfully.

AutoSave Off Book1 - Excel

File Home Insert Page Layout Formulas Data Review View Developer BI Tools

Clipboard Font Alignment Number Styles Cells

Prospect Wait List

Date and Time report printed : 26/02/2025 12:50:07

ID	Serial	Code	Description	Category	MobileNum	TelNum	Email	FirstContact	Deposit	Zone	ZoneType	Garage	Year	Active	Withdrawn	Refundable	SortNo
9	9	VAN003	van Rooyen, Ansie	RH - Self Sufficient	083 222555	044 695 11223	ansie@vanrooyen.co.za	2025-02-26	R 2 000.00	Section 2	1 Bedroom Unit	Yes	2026	No	No	Yes	1
1	1	VAN001	Van der Merwe, Jan	RH - Self Sufficient	084 123456	011 456123	jan@vdm.com	2025-02-05	R 4 000.00	Section 5	2 Bedroom Unit	Yes	2025	No	No	Yes	2
2	2	AND001	Anderson, Andrew	RH - Self Sufficient	086 232323	044 695124	andrew@anderson.com	2025-02-05	R 1 000.00	Section 1	Bachelor Unit	Yes	2026	No	No	Yes	3
4	4	GRE001	Greeff, Janet	RH - Self Sufficient	085 124578	044 695121	janet@greeff.com	2025-02-05	R 2 000.00	Section 4	1 Bedroom Unit	Yes	2026	No	No	No	4
5	5	MAL001	Malan, Liza	Frail Care	083326566	044789654	liza@malan.com	2025-02-05	R 3 000.00	Section 3	Frail Care	No	2026	No	No	No	5
7	7	SMS001	Southport Medical Supplies	Equipment Hire	081 123654	021 123654	Southport@medicalSupplies.com	2025-02-25				No			Yes	No	6
8	8	VAN002	van Rensburg, Walter	RH - Self Sufficient	082 451245	044 690 1245	walter@vanRensburg.com	2025-02-25	R 2 000.00	Section 2	1 Bedroom Unit	Yes	2026	No	No	Yes	7



Relations Management

10

The Mobile App

The Mobile App

The Novtel Relations Management app takes existing desktop application correspondence features to the cloud, enabling you to view important information and perform key tasks on-the-go.

Novtel clients can now also view contact details, and communicate with their **Sage Pastel, Sage Evolution or Xero Customers and Suppliers** through the Novtel app via:

- Cellphone Number
- Landline Number
- WhatsApp

Prospects:

Also view and contact your Novtel Prospects via the methods listed above.

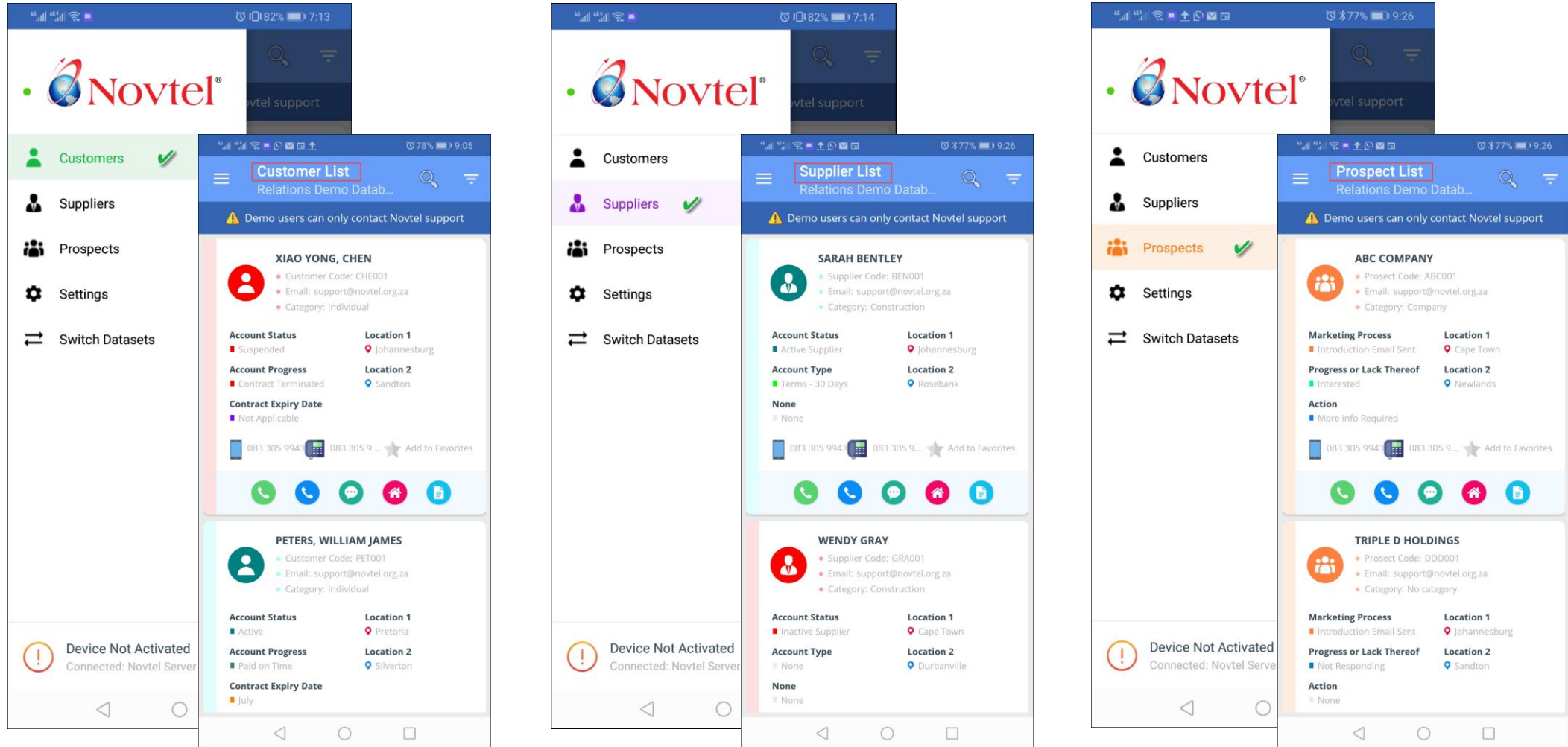
Multiple Dataset Processing:

The app can display information from, and perform work in, any of the user's existing list of Novtel Relations datasets, making it quick and easy to manage correspondence on any dataset.

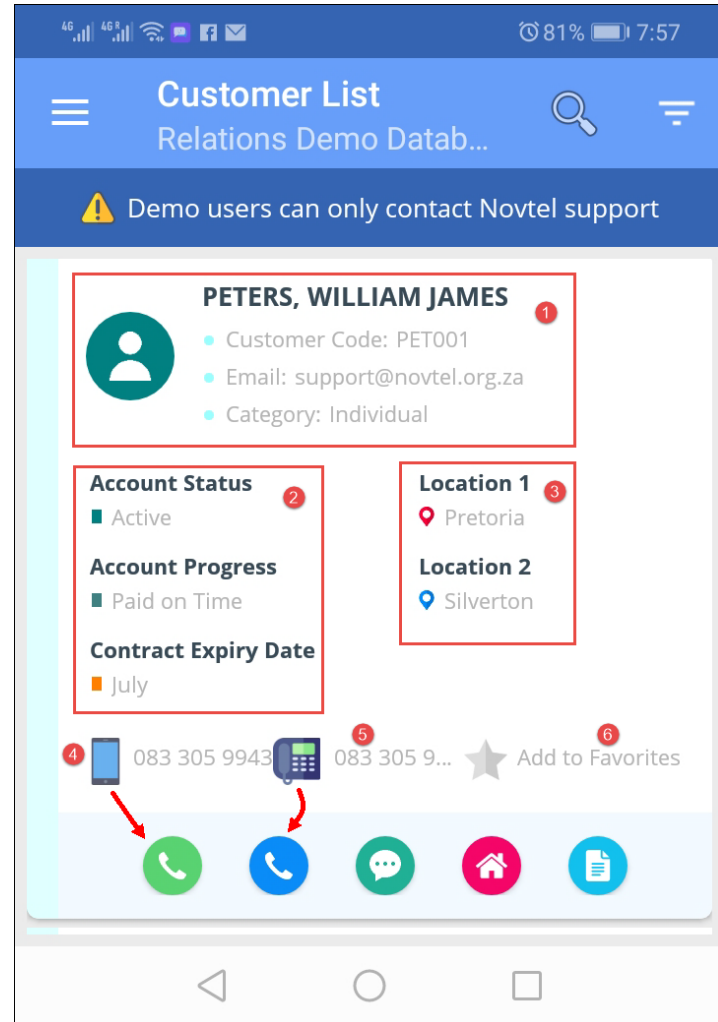


The Mobile App

Customers, Suppliers and Prospect Accounts are accessed by clicking on the respective option in the Menu.

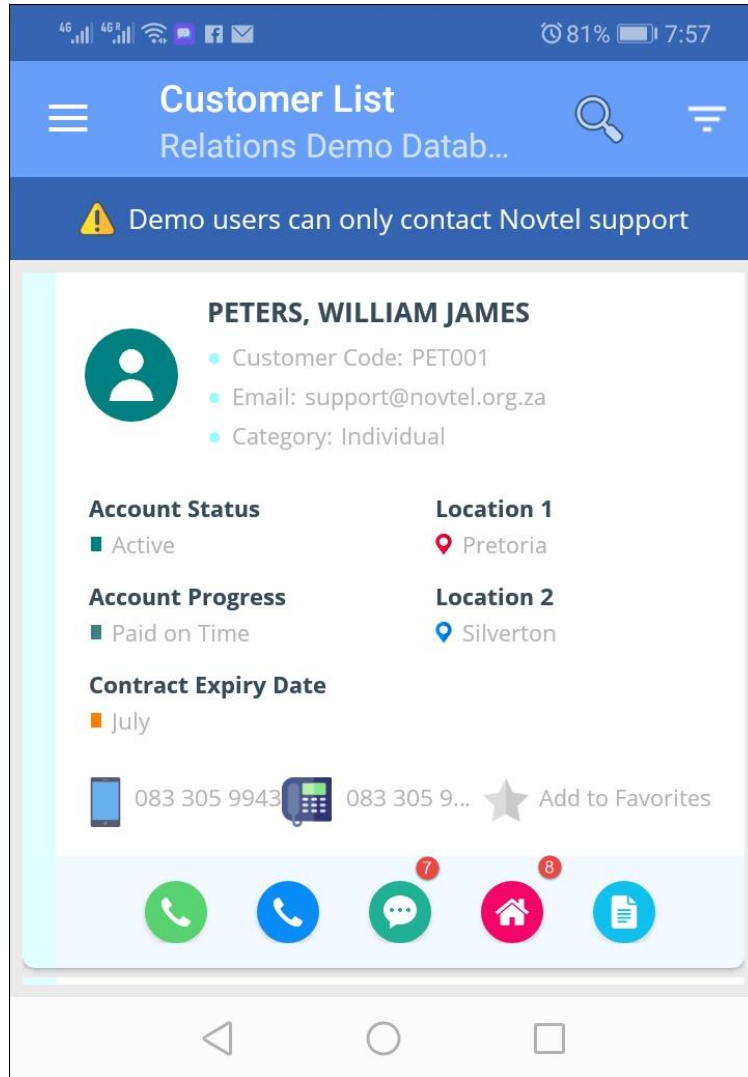


The Mobile App



1. Per Account, the Description, Code, Email Address and Category it is linked to, is displayed as set up in the desktop application.
2. The main and sub-statuses linked per selected Account, are listed here.
3. The specific locations associated per Account, are captured here.
4. The Account's main cell number is listed here and can be dialed by clicking on the telephone displayed in a **green** background.
5. The Account's main landline number is listed here and can be dialed by clicking on the telephone displayed in a **blue** background.
6. An Account can be classified as a 'Favorite' and will always be displayed at the top of the contact list, and in alphabetical order.

The Mobile App



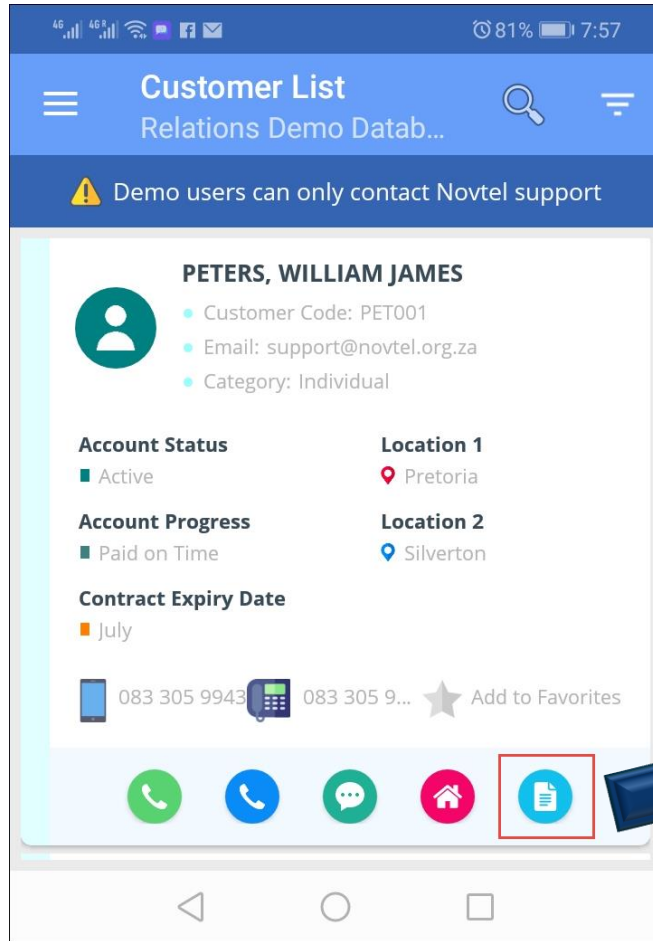
7. A WhatsApp message can be created and sent to the listed Cell number, by tapping the 'Message' icon.

8. Google Maps integration:

Easily view and navigate to your Sage Pastel or Sage Evolution Customer and Supplier addresses.

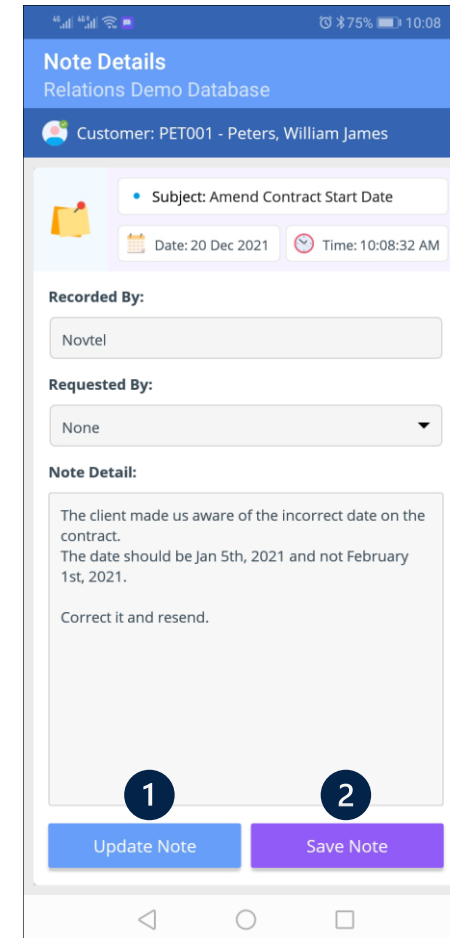
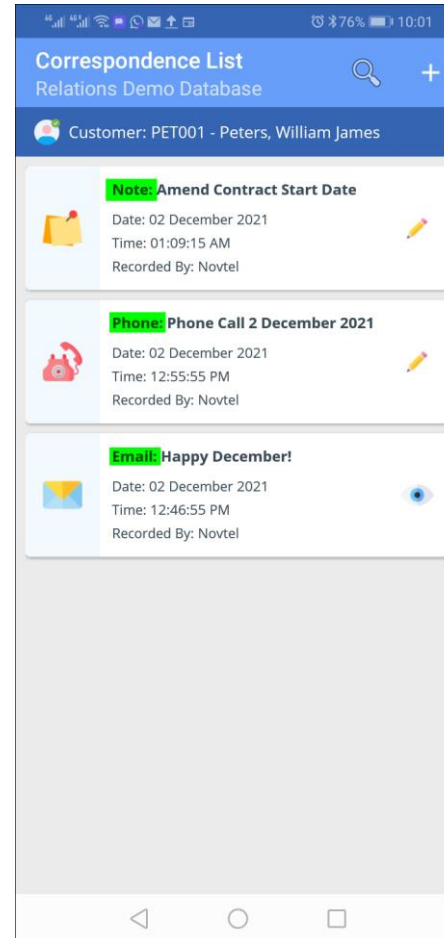
Simply tap on this icon to set a pin in Google maps.

The Mobile App



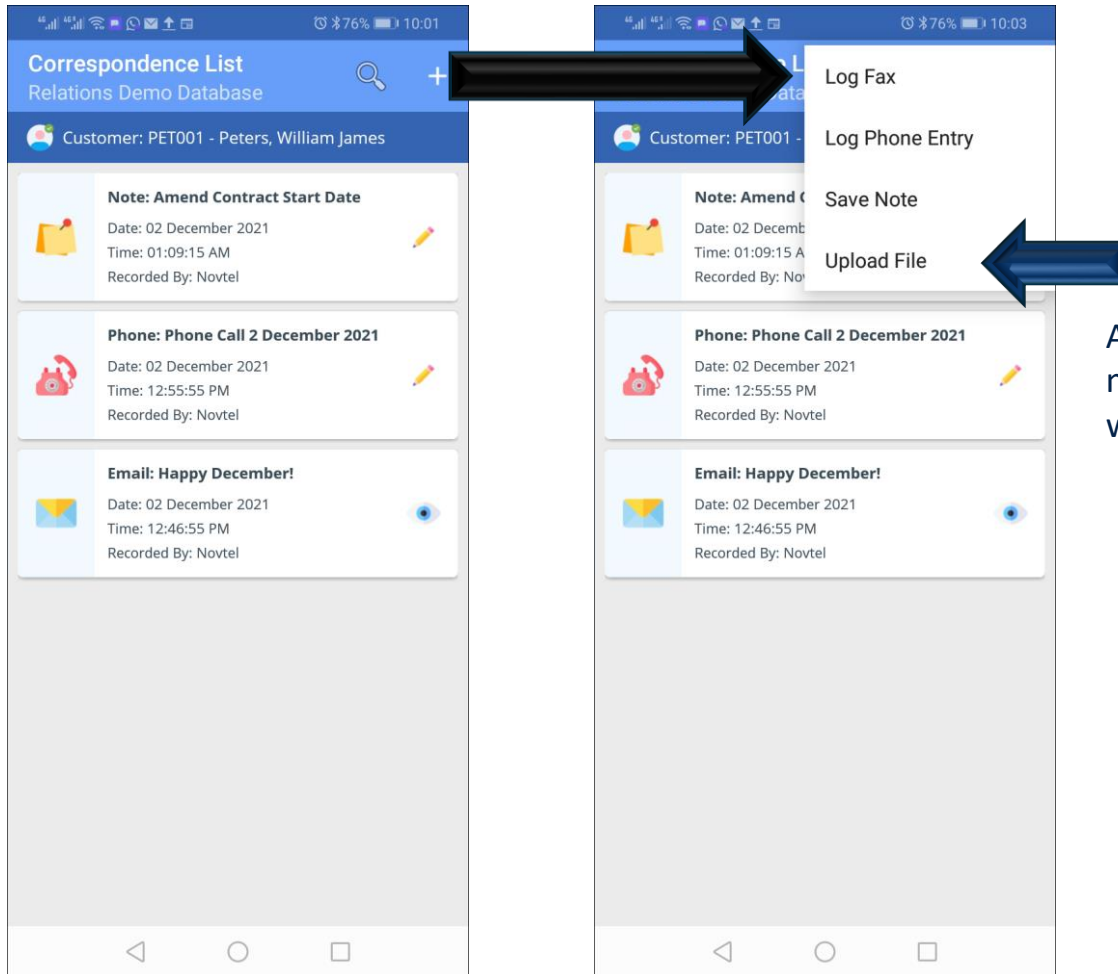
Tapping a correspondence item, the details will be displayed as captured.

- 1 From here, the existing note can be amended and updated...
- 2 OR the note can be amended, and a new note saved.



The Mobile App

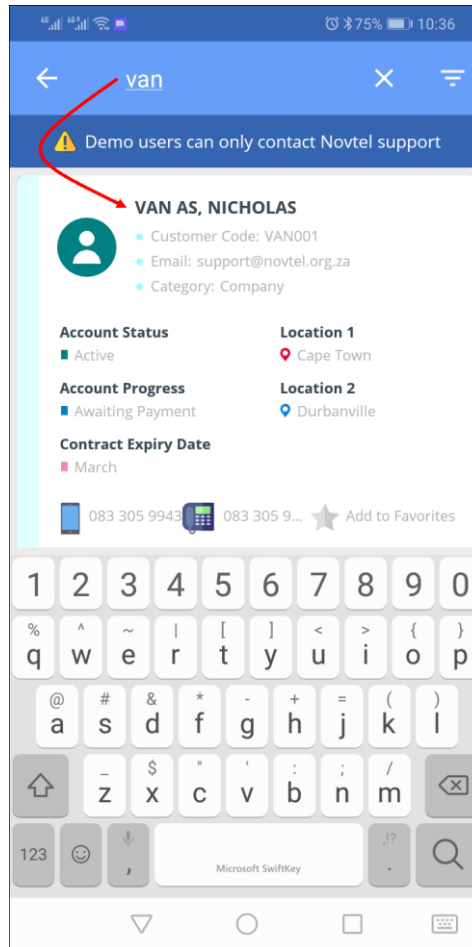
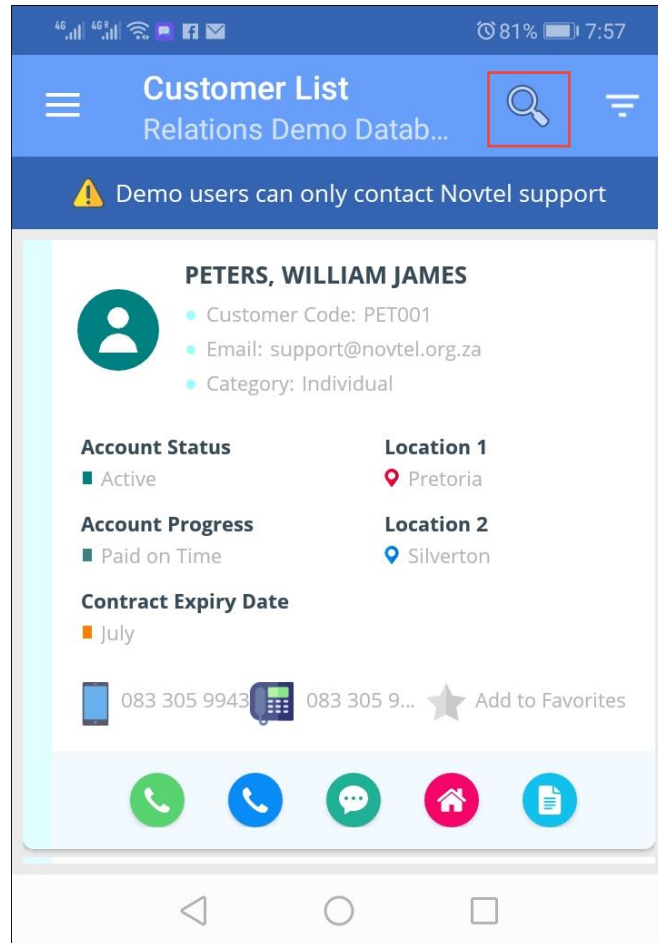
Tapping the '+' sign in the 'Correspondence List' window, a new fax, phone entry and note can be captured by selecting the relevant option.



A new file can also be uploaded from the stored location on the mobile device and will be available to view directly in the app, as well as the desktop application.

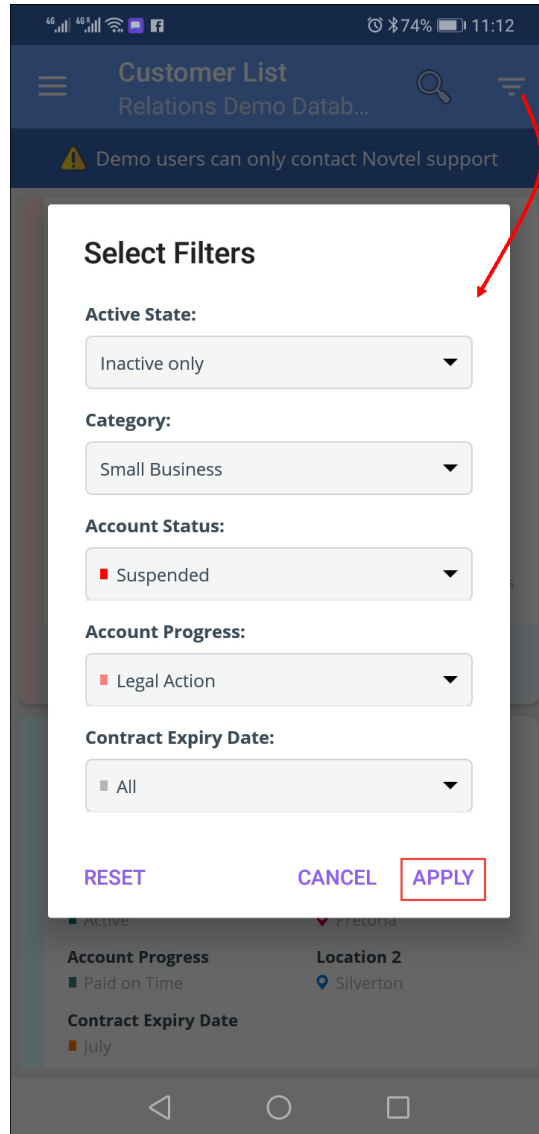
The Mobile App

A Customer, Supplier or Prospect Account can be searched for by tapping the 'Search' icon in the relevant screen.



Either search for the Account Code or Description in the 'Search' field.

The Mobile App



Accounts can also be filtered and grouped together according to:

➤ **Active State:**

- ✓ Active Accounts Only
- ✓ In-active Accounts Only
- ✓ All Accounts

➤ **Category:**

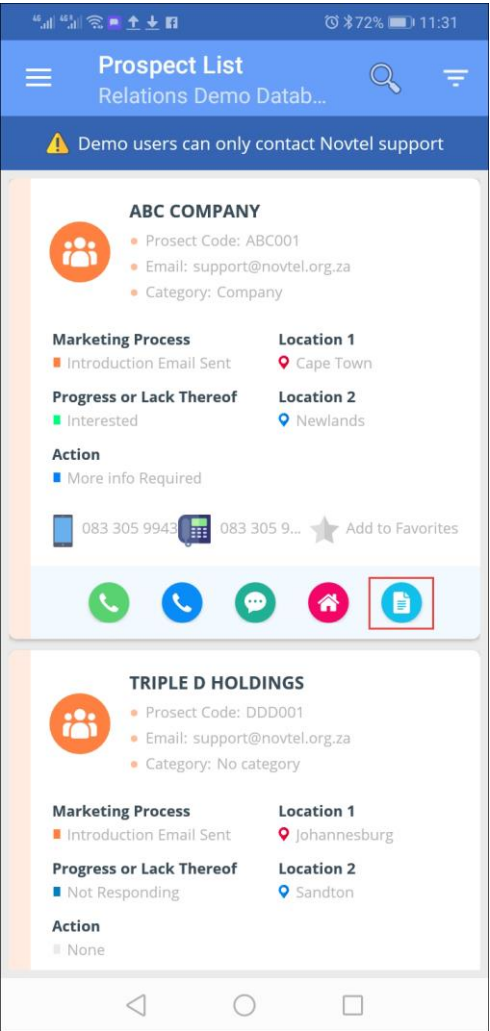
A specified Customer, Supplier or Prospect Category.

➤ **Sub-Statuses:**

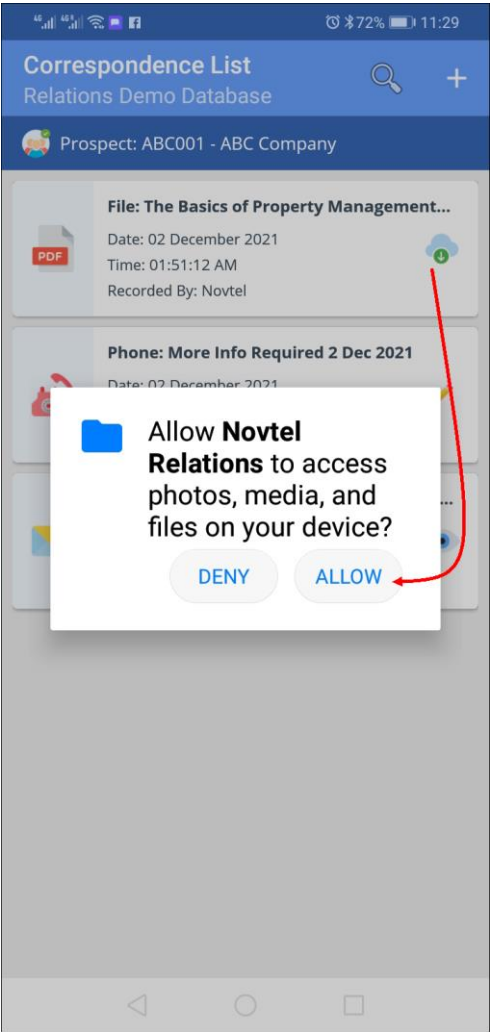
A specified sub-status linked to a main status.

The search will be performed, and the matched criteria listed upon tapping 'Apply'.

The Mobile App



A document can be viewed directly from the app by first tapping on the 'Document' icon from the required Account.

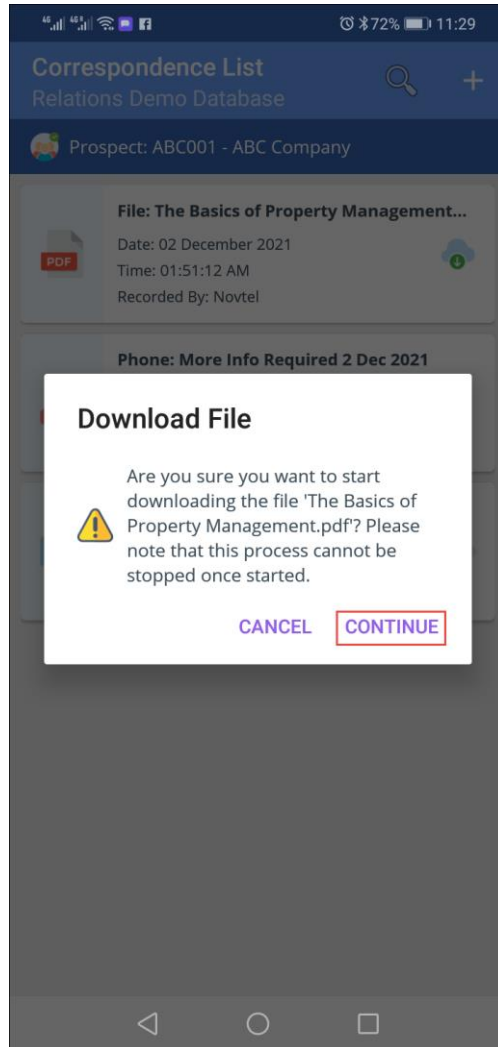


The document is now be tapped to be downloaded to the mobile device.

Only when the first document is downloaded, will permission be required to access the files on your device, and this action is to be approved.

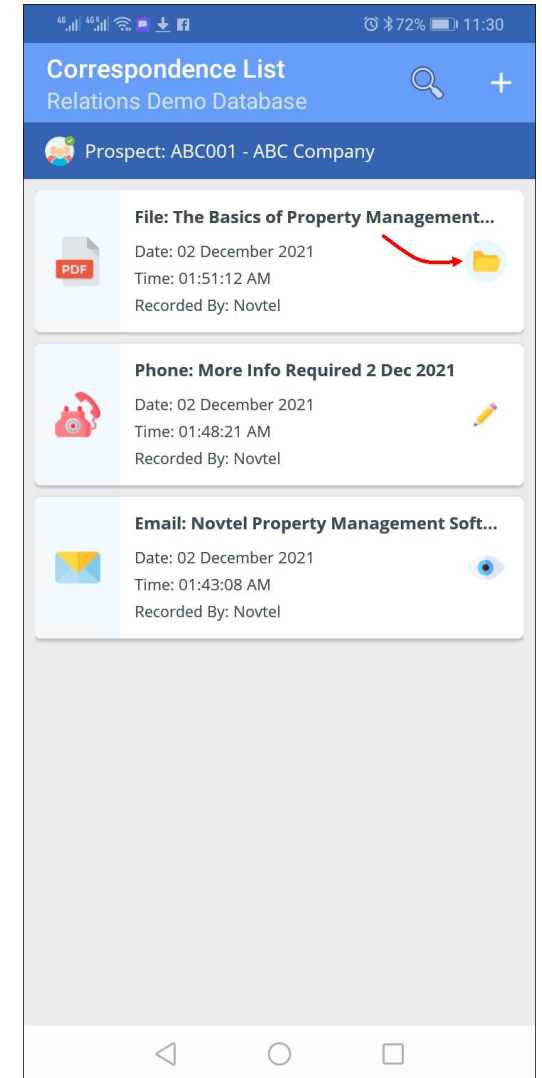
From now on, the communication will not appear again.

The Mobile App



Tap 'Continue' to proceed with the downloading of the document.

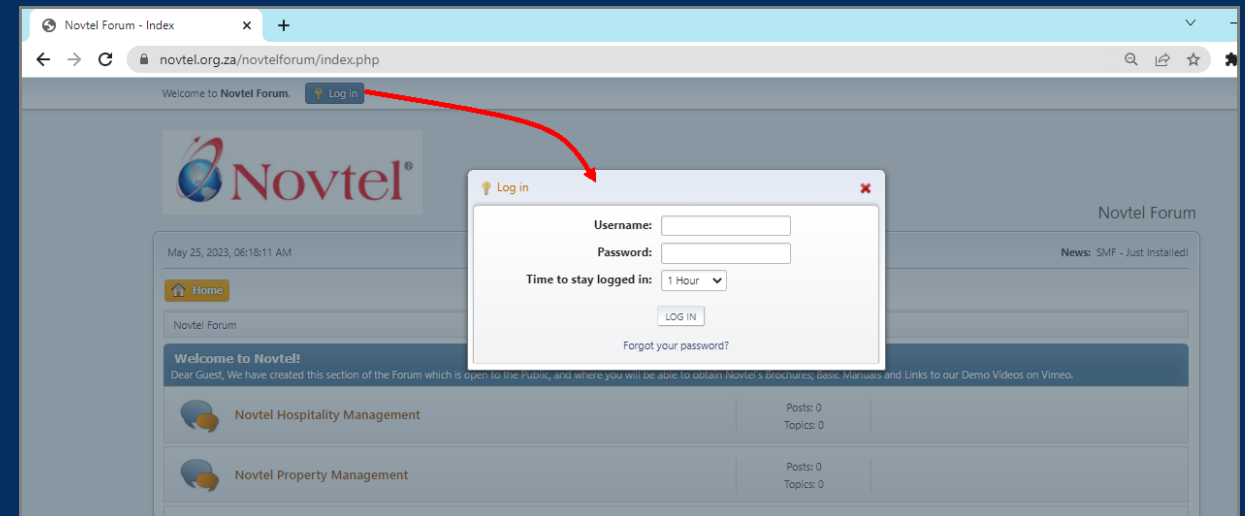
By tapping on the downloaded document, it will be opened.





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