Novtel®

Relations Management

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

The Basics of Novtel Relations Management

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Novtel®

Relations Management

1

Introduction

Image by wahyu_t on Freepik

Introduction

Novtel Relations Management integrates with:

Microsoft Products

- Word
- Excel
- Outlook
- Access
- SQL

Financial Systems

Sage
- 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

EMAIL

SMS

By means of e-mail, SMS, notes and instructions, you are able to build a communication history and track-record in one central system.

NOTES

INSTRUCTIONS

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

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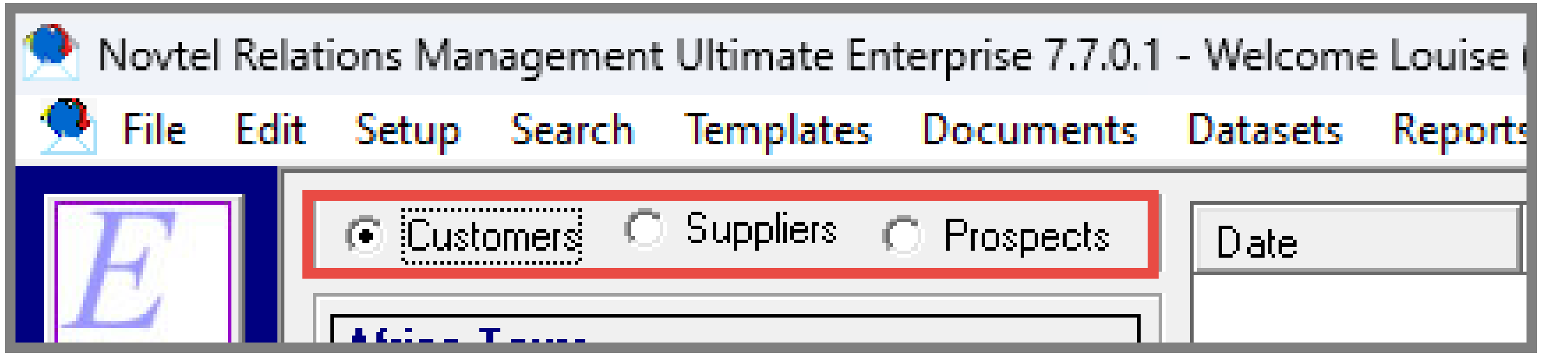
Customer, Supplier and Prospect Accounts

Image by wahyu_t on Freepik

Customer, Supplier and Prospect Accounts

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

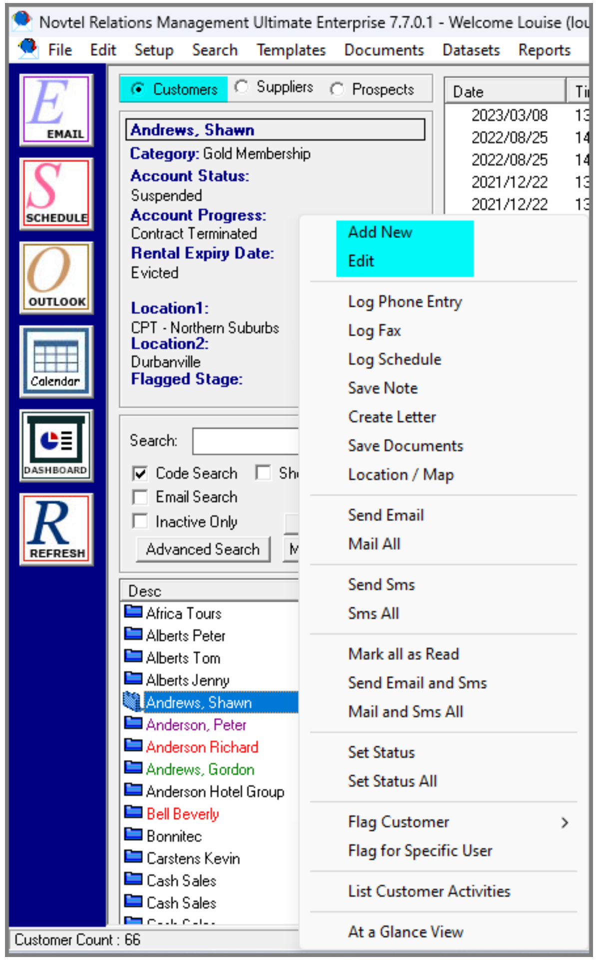
Reports for each can be obtained; communication actions performed and existing correspondence viewed.



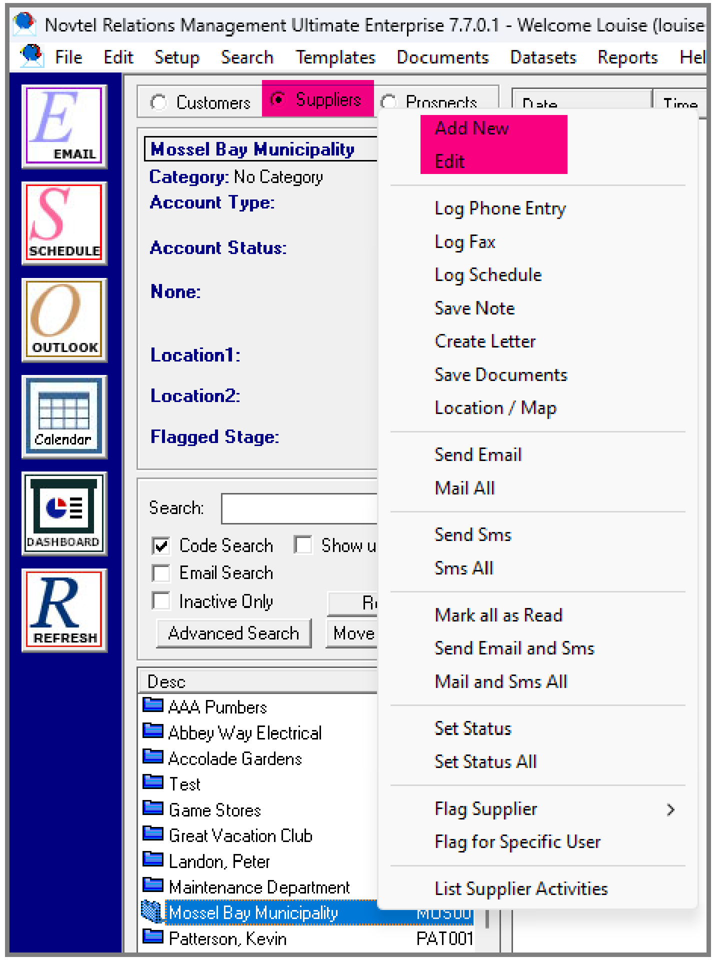
Customer, Supplier and Prospect Accounts

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

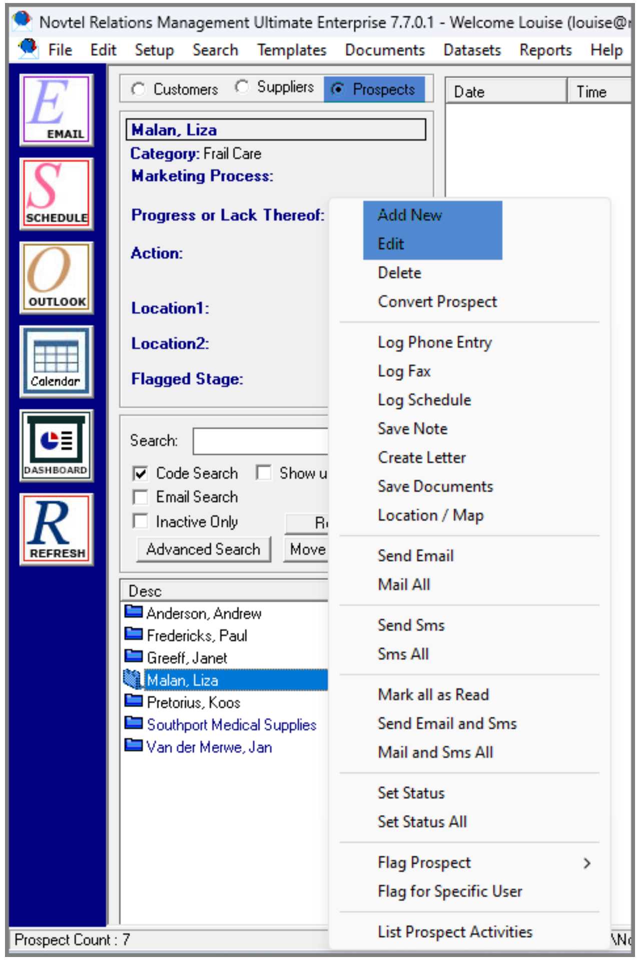
Customers



Suppliers



Prospects

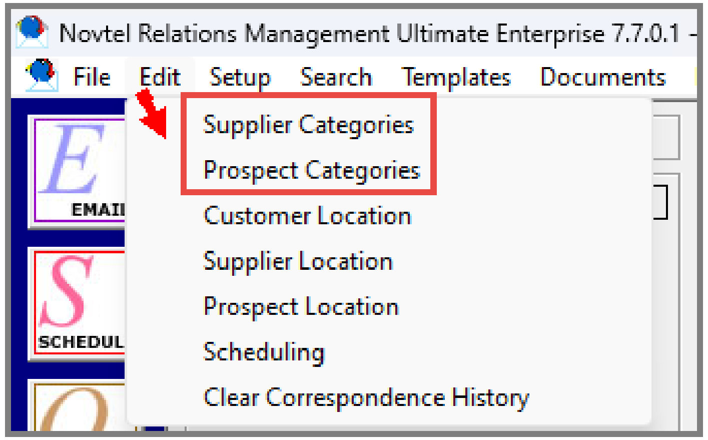


Customer, Supplier and Prospect Accounts

Each Account can be linked to a specific Category.

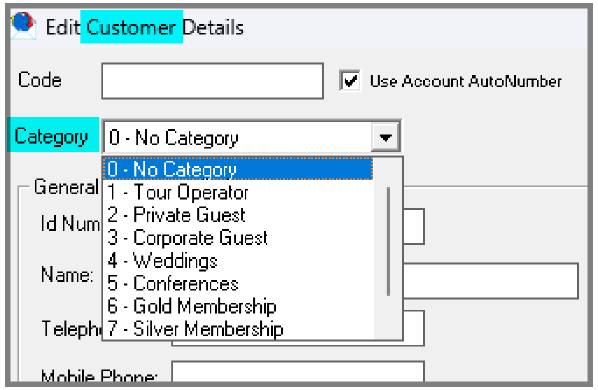
Customer Categories are set up in the linked financial system and will be available for selection in Novtel.

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

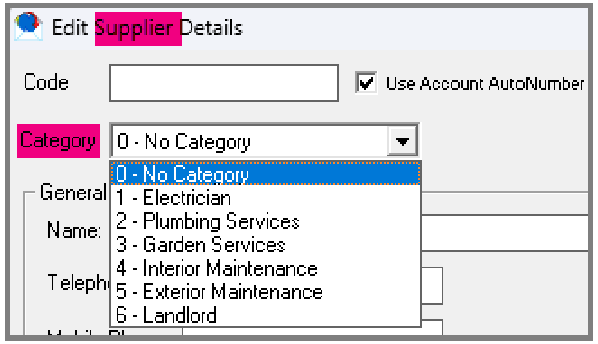


Advanced searches can be performed to group all accounts linked to the same category for the purpose of sending a bulk email and/or SMS to all accounts simultaneously.

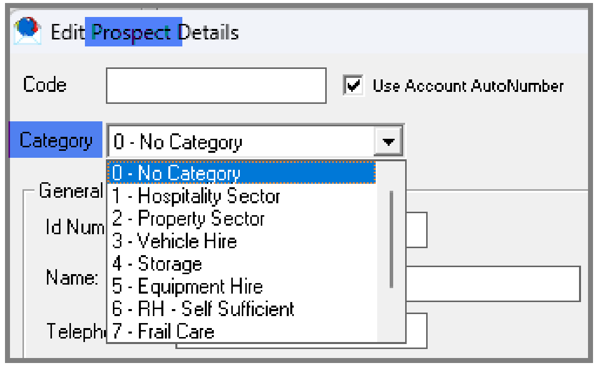
Customers



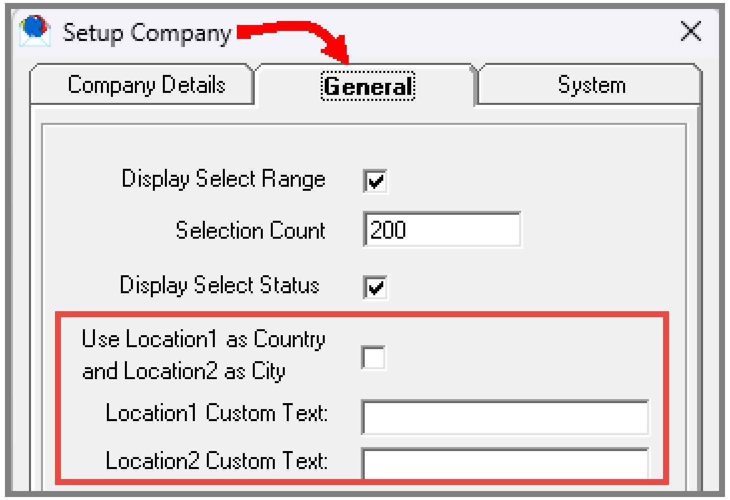
Suppliers

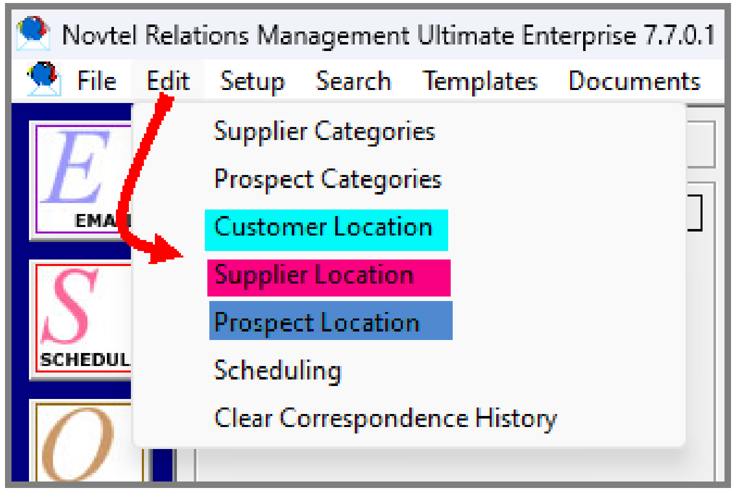


Prospects



Customer, Supplier and Prospect Accounts



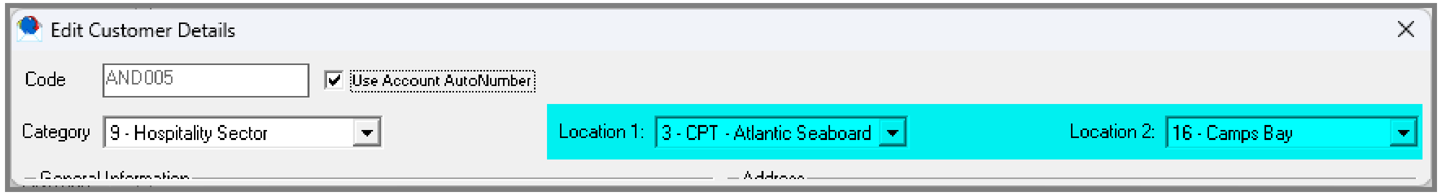


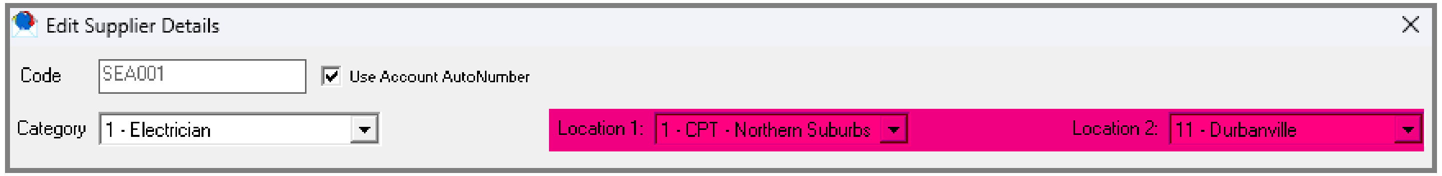
'Locations' can refer to either of the following – depending on how the system is set up:

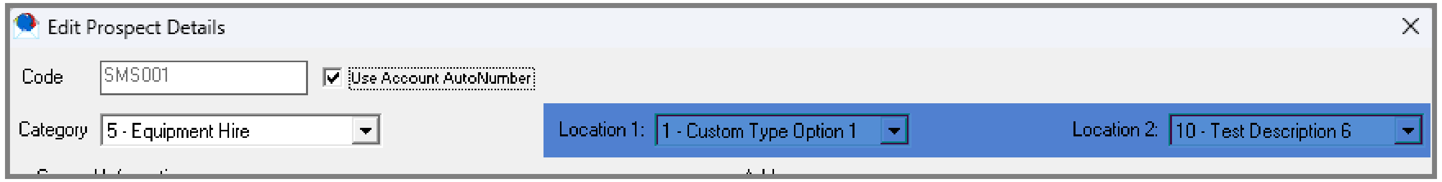
- ✓ Countries and Cities
- ✓ Cities and Suburbs
- ✓ Or 'Locations' can be customized to reflect your required headings and customized entries.

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.







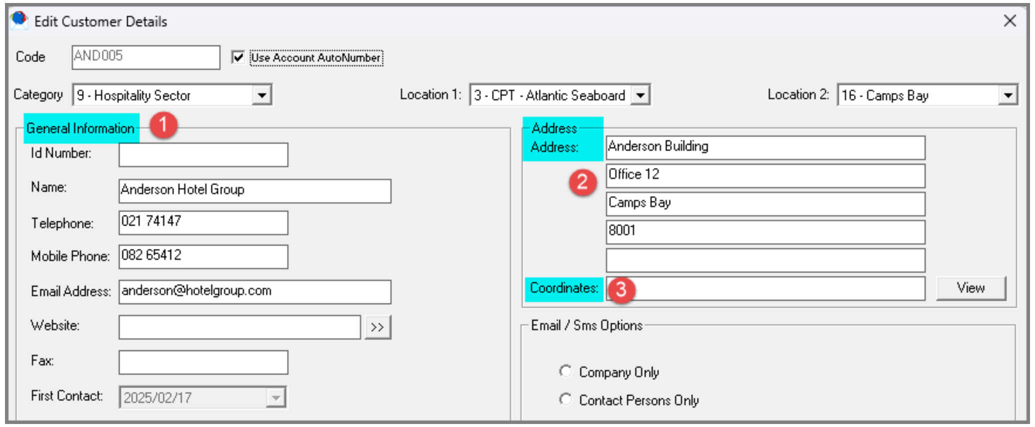
Customer, Supplier and Prospect Accounts

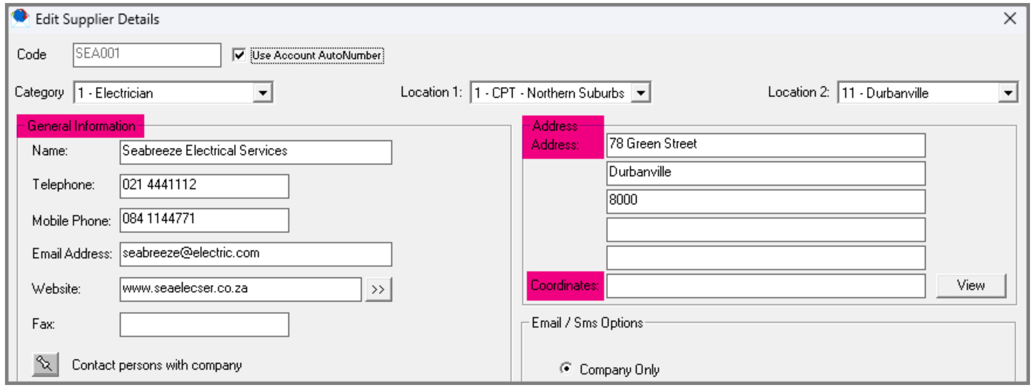
1. General Information per Account includes:

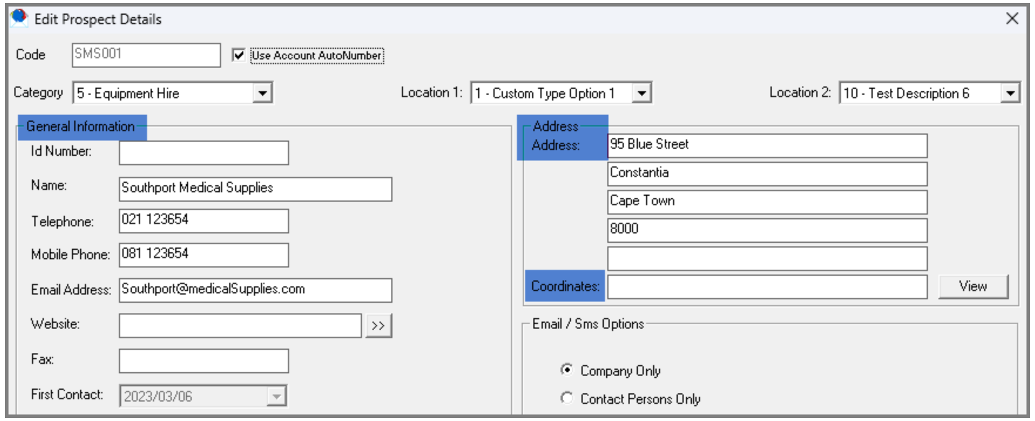
   - ID Number (Customer and Prospect Accounts ONLY)
   - The Account Name
   - Telephone and Mobile Numbers
   - Email Address
   - Website
   - Fax Number
   - The date upon which contact was first established (Customer and Prospect Accounts ONLY)

2. The physical address is captured per account.

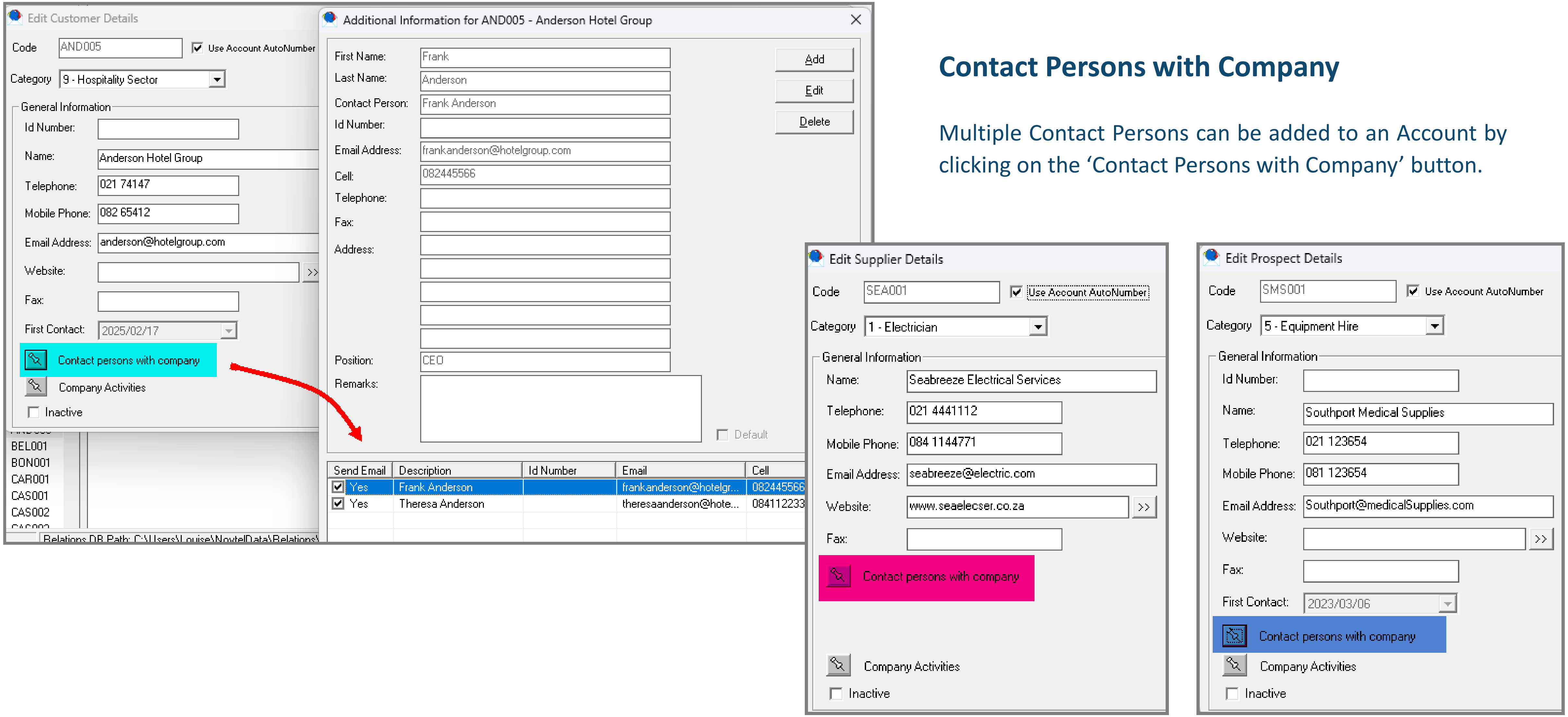
3. And the ‘GPS Coordinates’ can be entered if required.







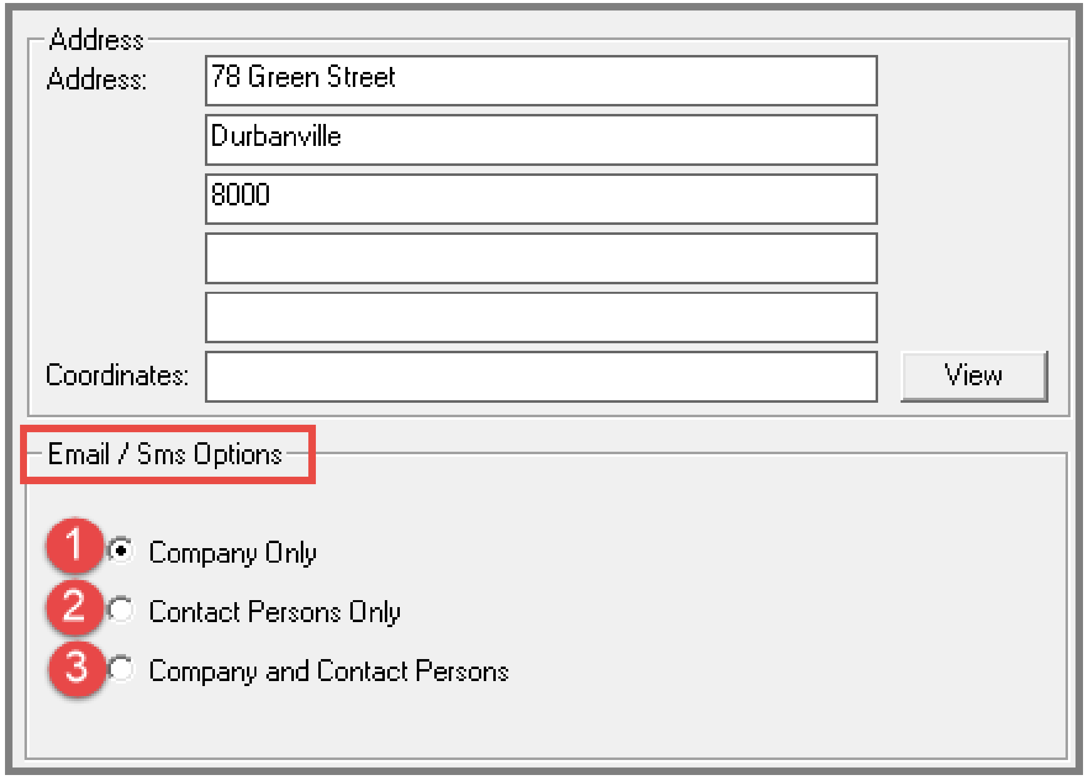
Customer, Supplier and Prospect Accounts



Contact Persons with Company

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

Customer, Supplier and Prospect Accounts



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.

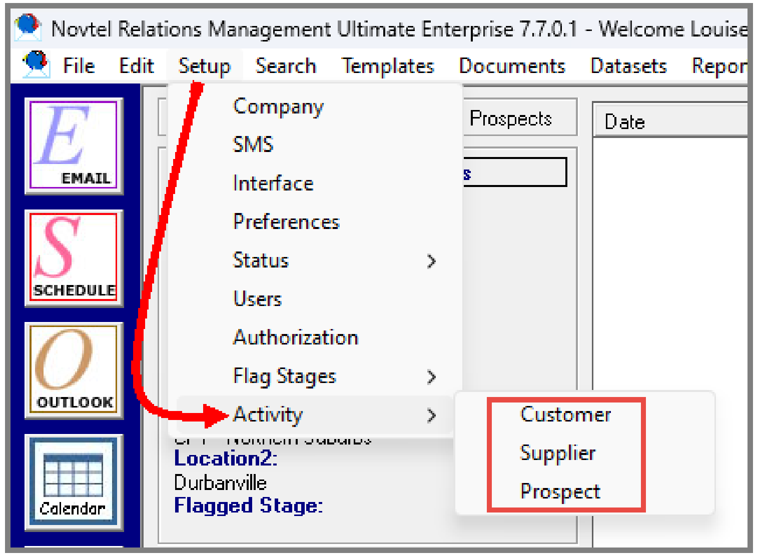
2. **Contact Persons Only**

   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



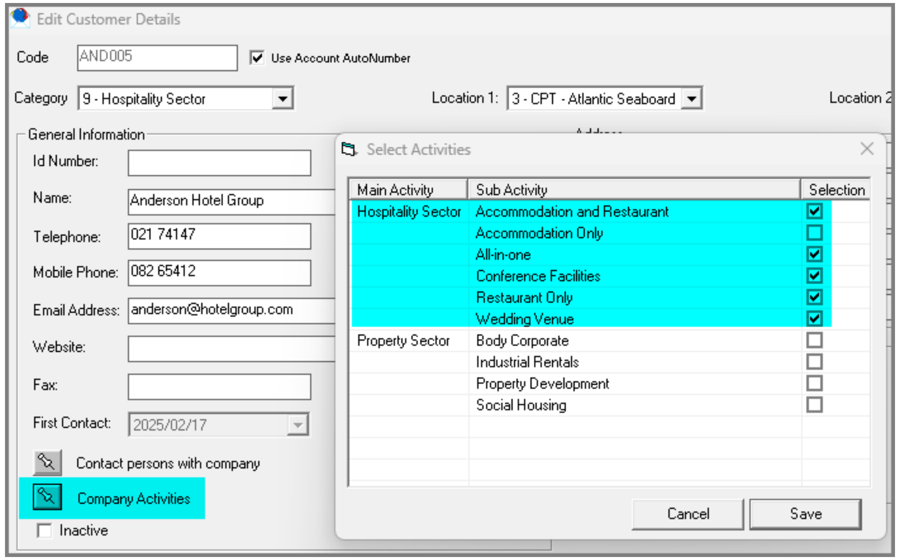
‘Activities’ can be created according to the type of business a Customer; Supplier or Prospect is associated with.

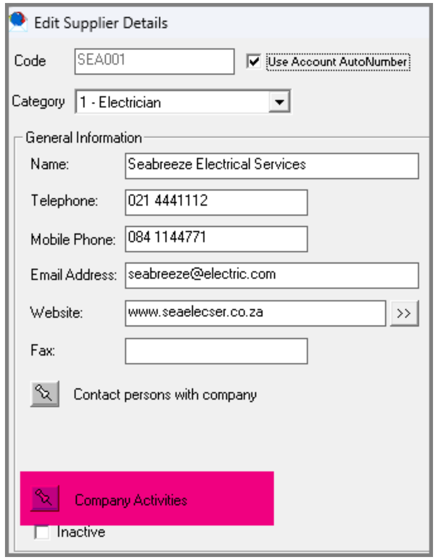
The specific option or options can then be linked to the respective accounts directly on the Customer, Supplier or Prospect Master File.

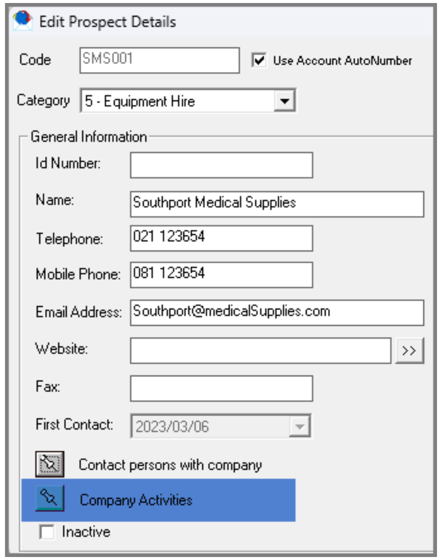
The User will be able to filter Activities or Sub-Activities by means of an advanced search, to send a bulk email or SMS to accounts linked to the same search criteria, simultaneously.

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

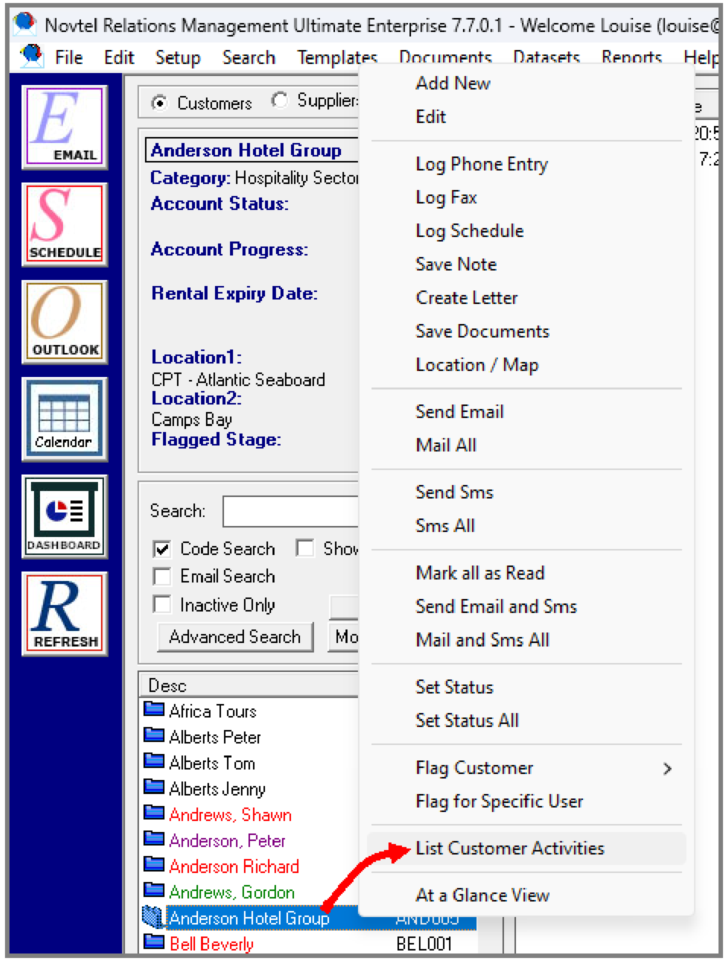
This action opens the ‘Select Activities’ window, displaying pre-created Activities and Sub-Activities.





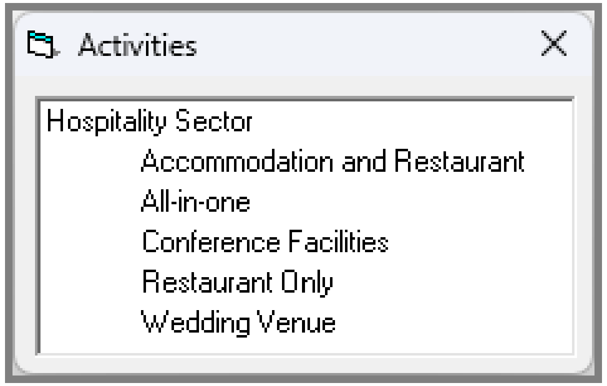


Customer, Supplier and Prospect Accounts



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.

Novtel®

Relations Management

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Email and/or SMS Communication

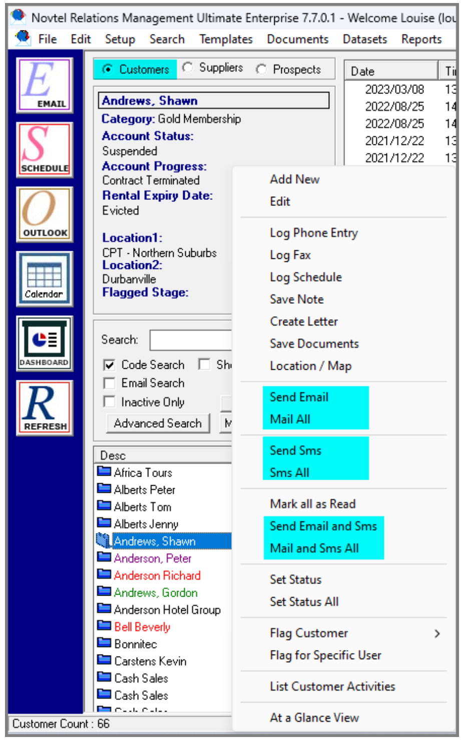
Image by wahyu_t on Freepik

Email and/or SMS Communication

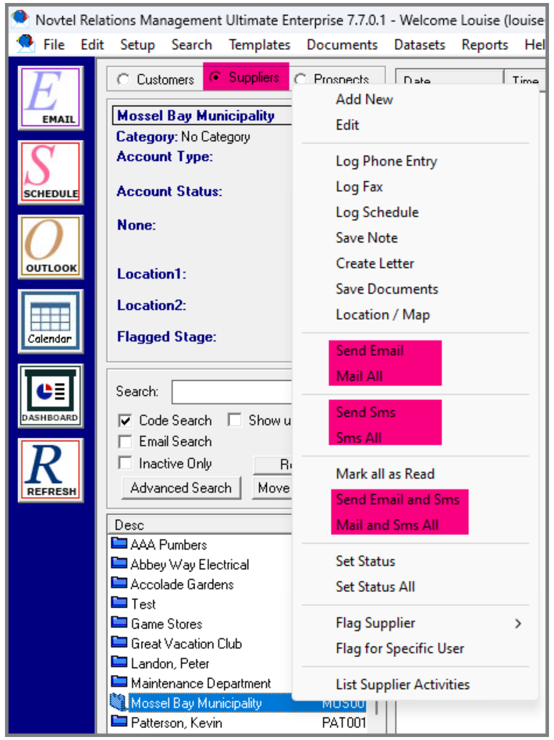
The following Communication actions can be performed on all Customer, Supplier and Prospect accounts:

- ✓ 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.

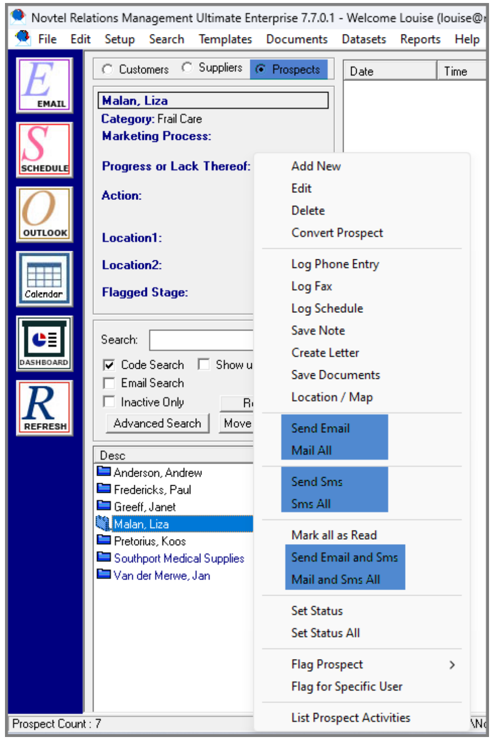
Customers



Suppliers



Prospects



Email and/or SMS Communication

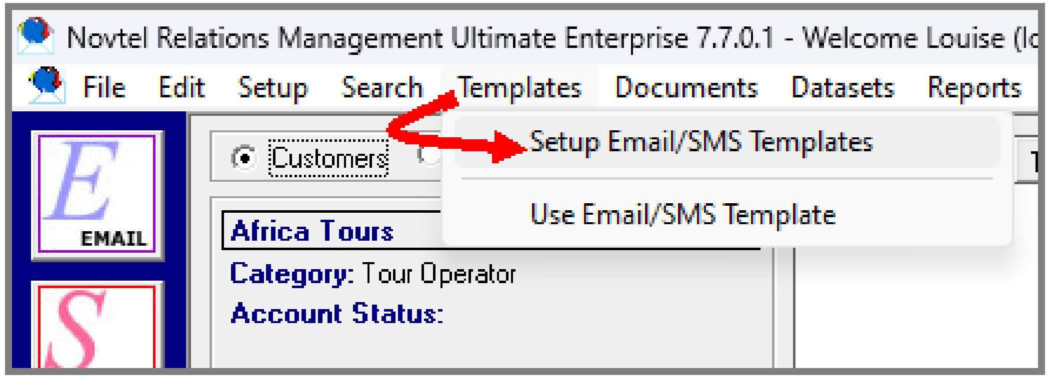
In Novtel Relations Management, an unlimited number of email and SMS templates can be created. The required template can be selected when sending standard communication to Customers; Suppliers or Prospects.

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

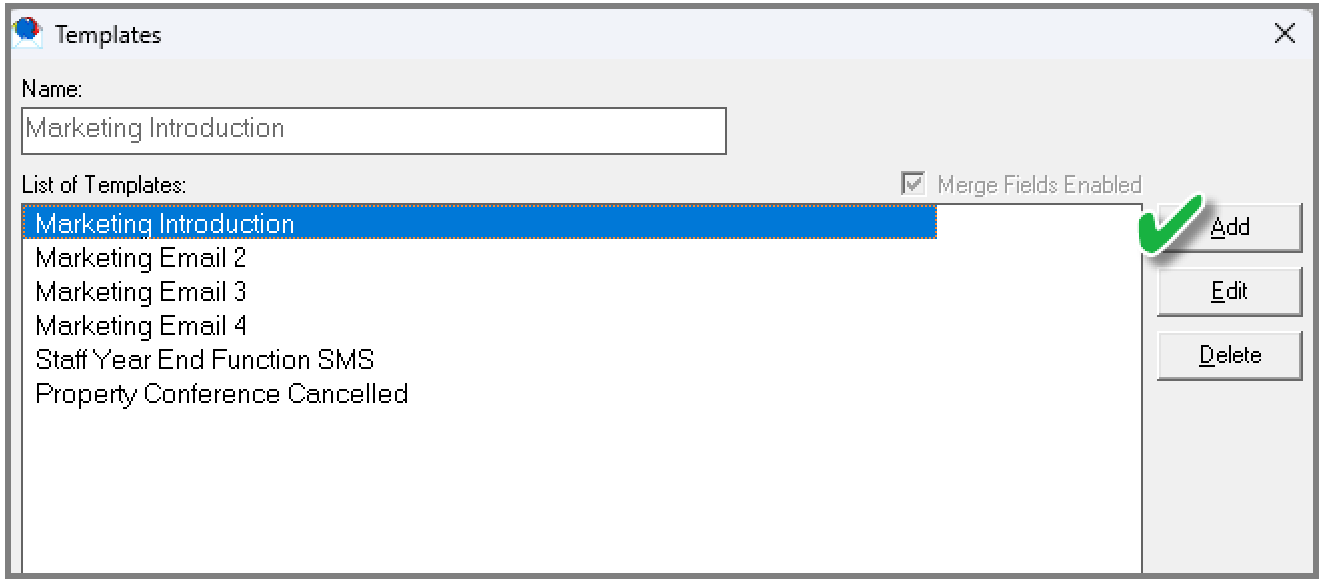
At present, the following can be selected to display customized information per Template:

- ✓ 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

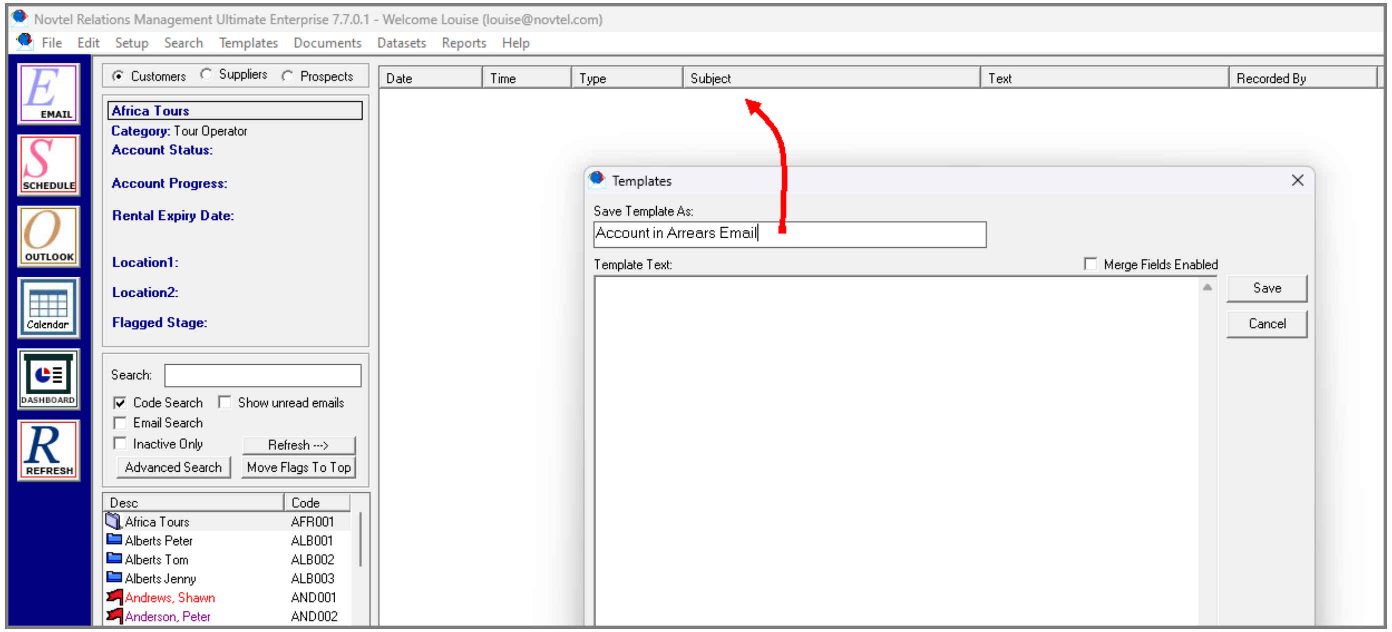


To create Email and / or SMS templates, click on the 'Templates' menu option and select 'Setup – Email/SMS Templates'.



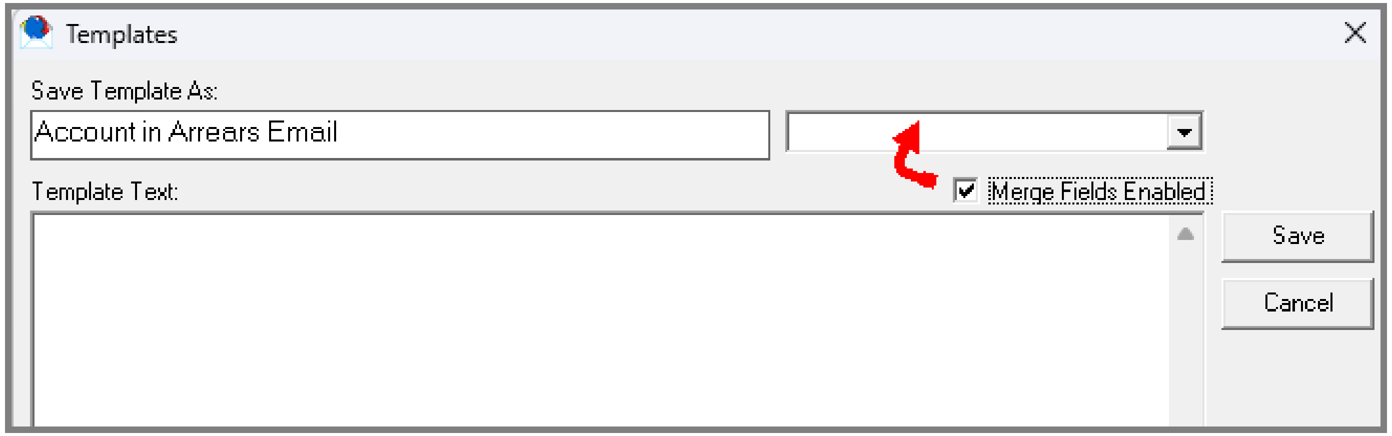
The 'Templates' window will now be displayed and to create a new Template, click 'Add'.

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.

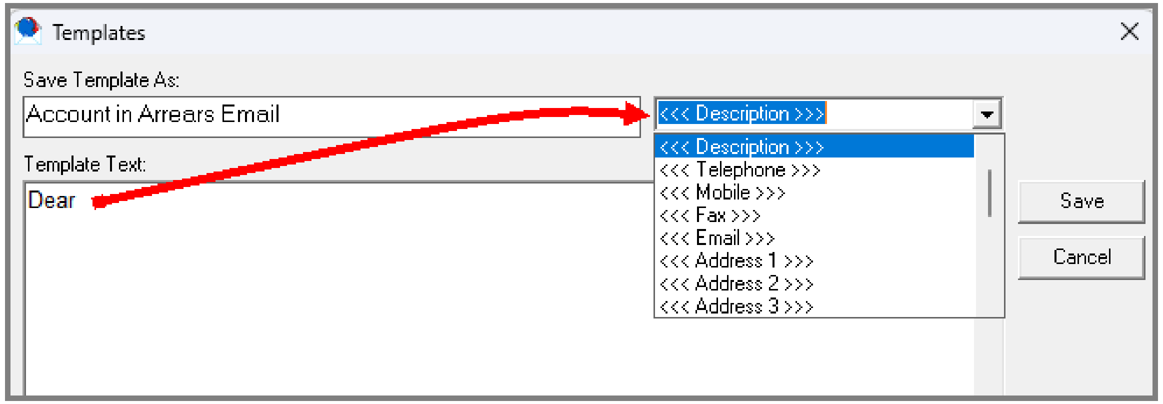
This description will also automatically be displayed as the Email or SMS Subject when sent.



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.

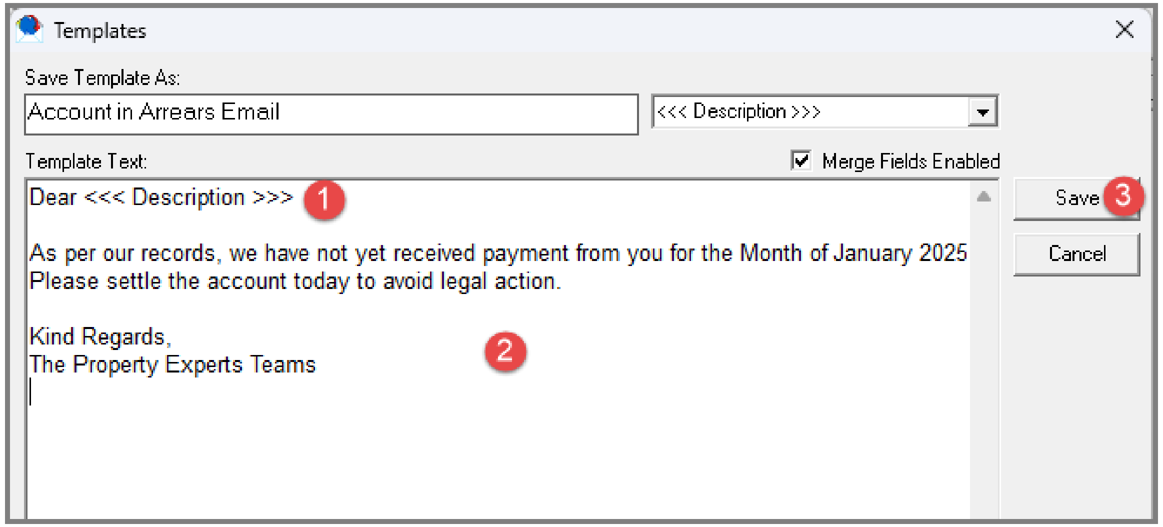
This immediately activates the field from where specific options can be selected to insert on the Template.

Email and/or SMS Communication



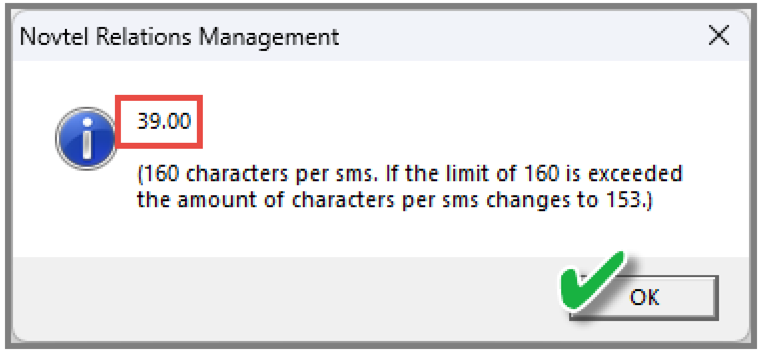
Next, the standard wording can be added to the ‘Template Text’ section.

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



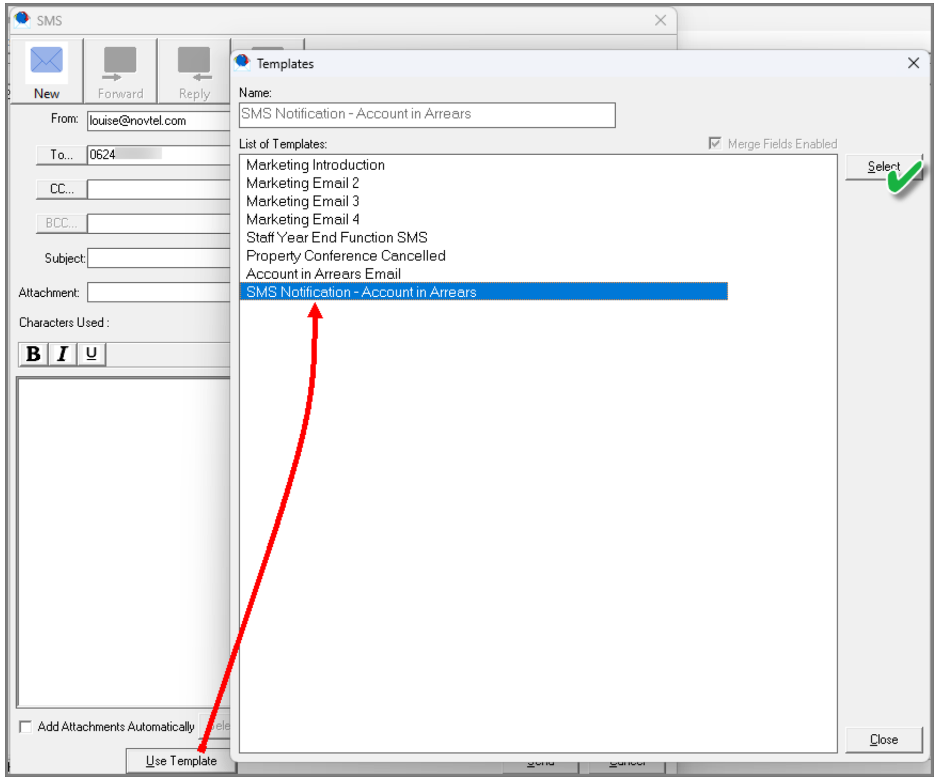
1. This merged option is now inserted here.
2. The rest of the ‘Template Text’ can be added and if needed, other ‘Merged Fields’ can also be entered if required.
3. Clicking ‘Save’, the Template has been created successfully.

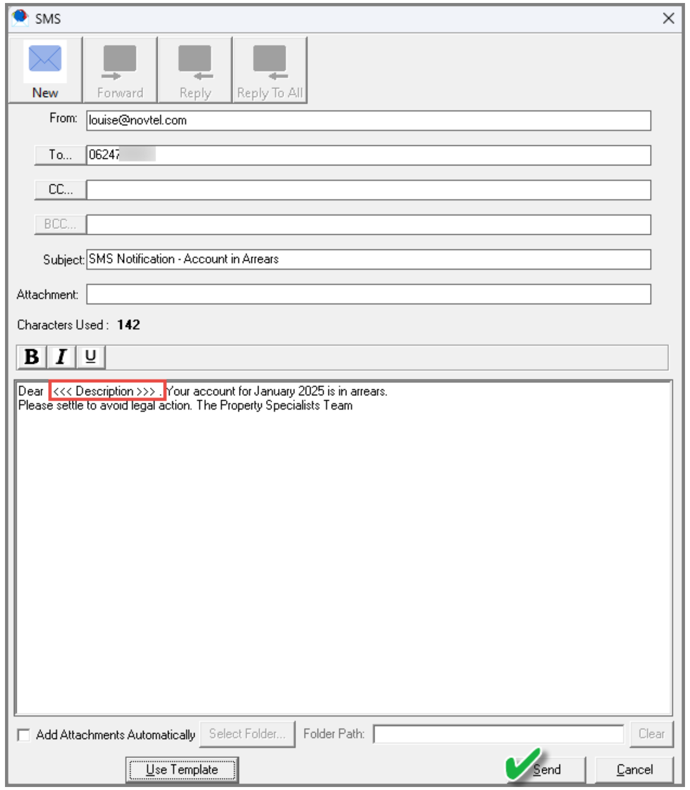
Email and/or SMS Communication



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

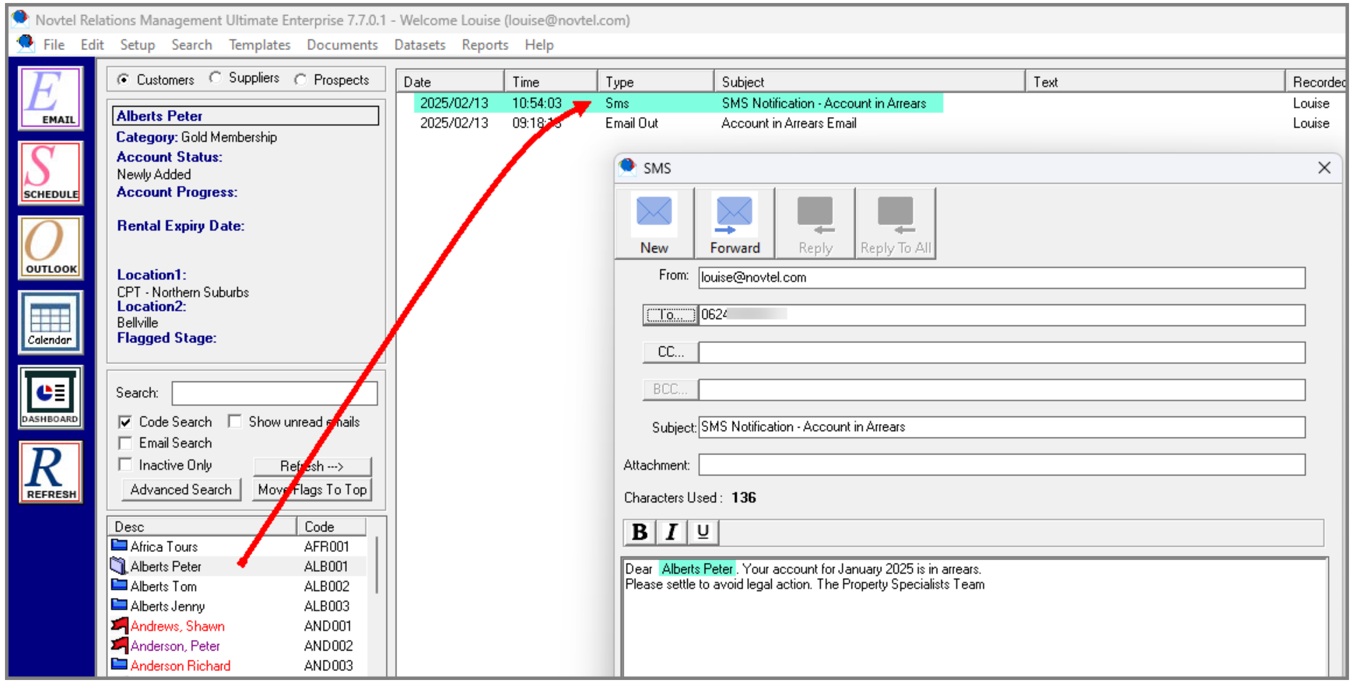
SMS Templates can be set up and used when sending a generic SMS to a single, or multiple accounts.

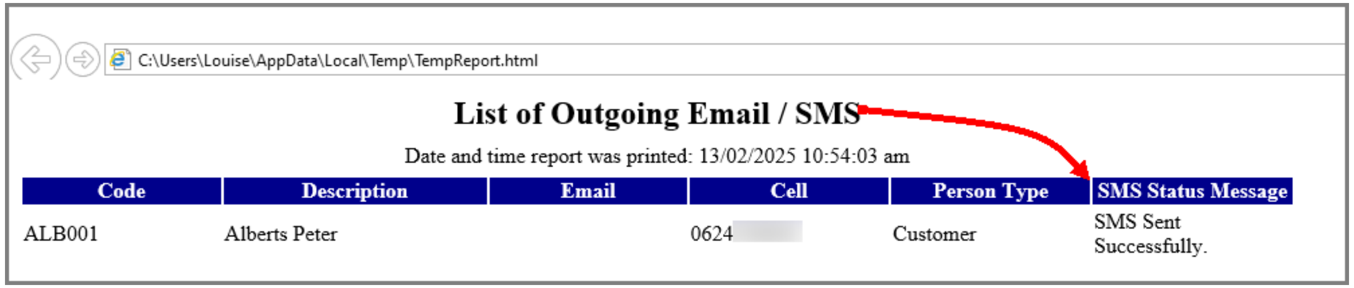




Email and/or SMS Communication

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.

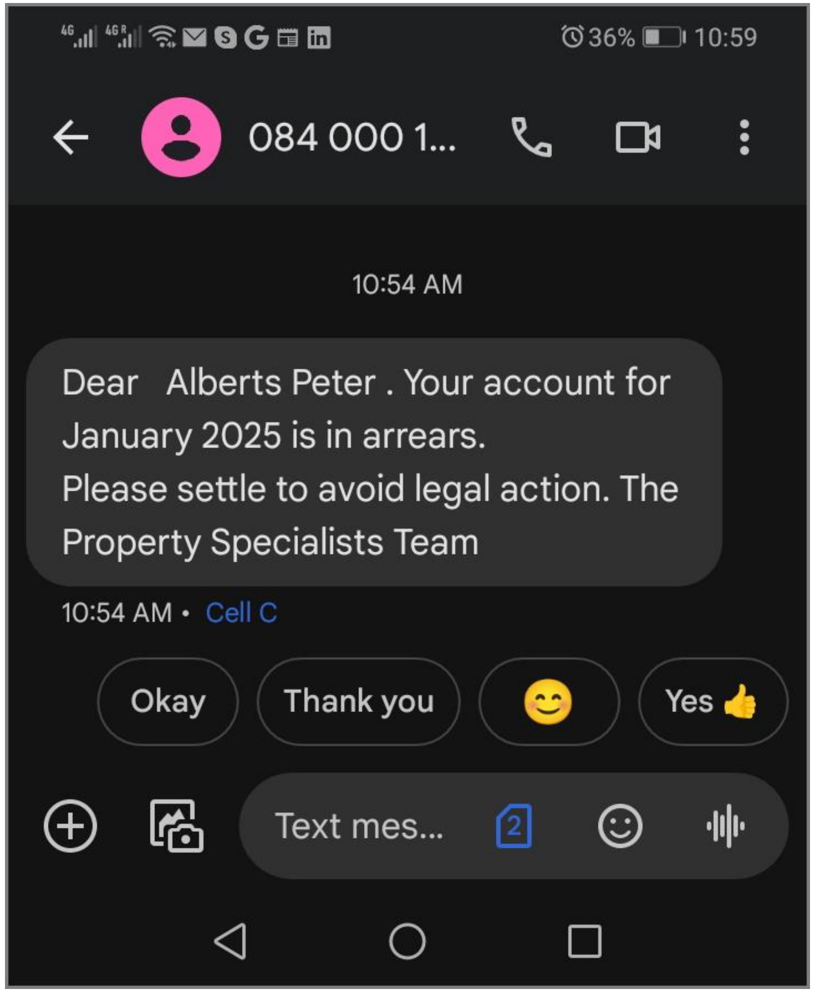



C:\Users\Louise\AppData\Local\Temp\TempReport.html

List of Outgoing Email / SMS

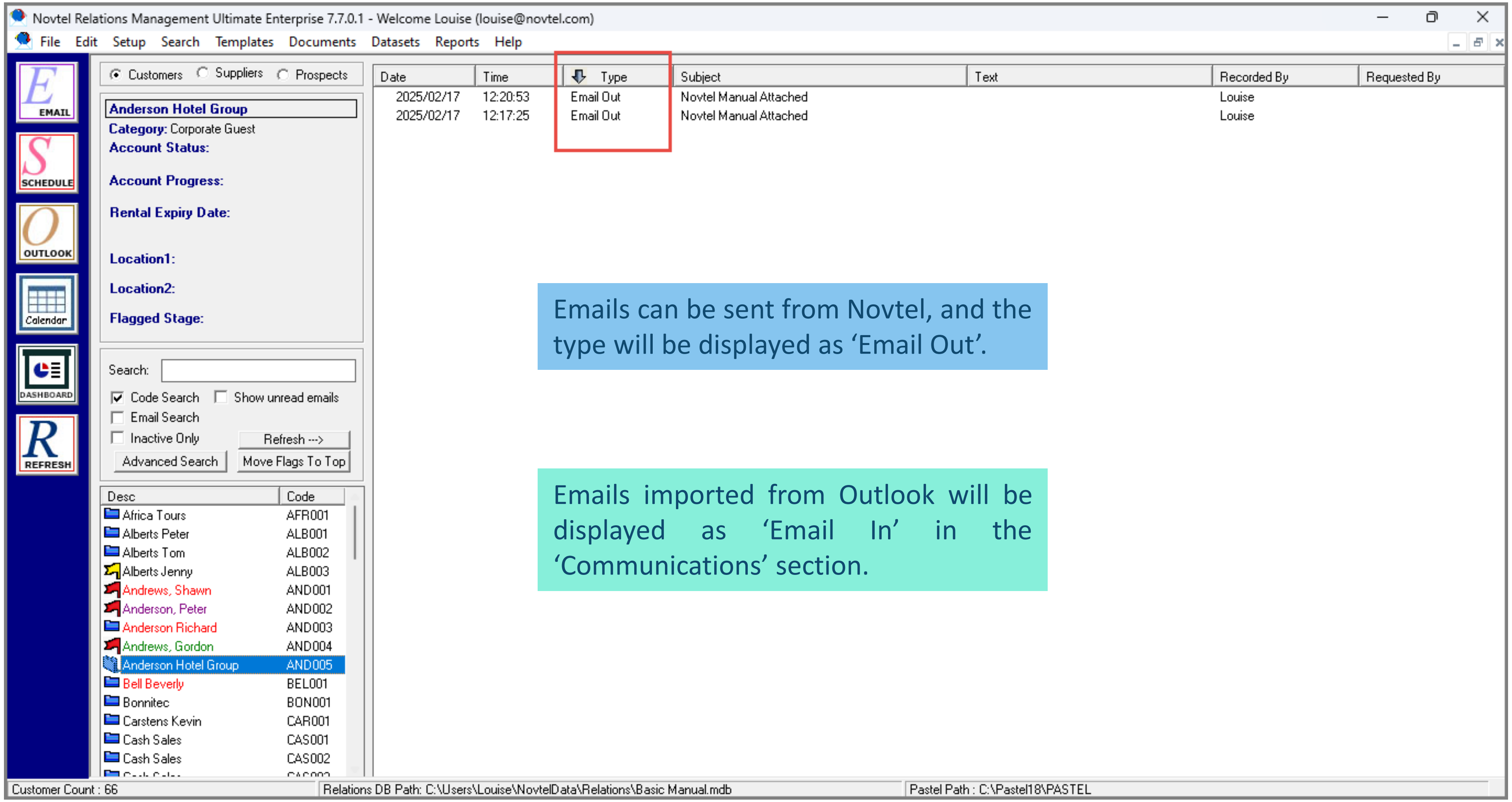
Date and time report was printed: 13/02/2025 10:54:03 am

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



Email and/or SMS Communication

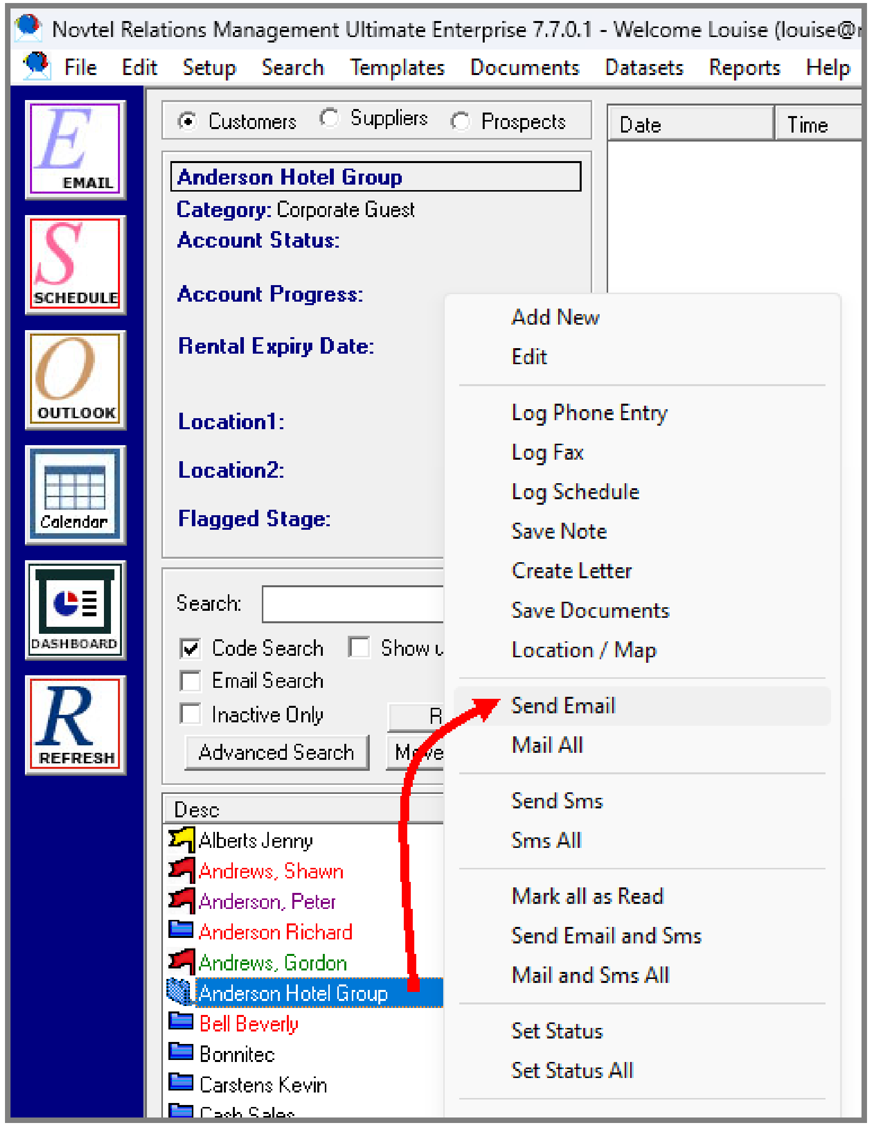
All Emails between your company and its Customers, Supplier and Prospects will be saved to the corresponding accounts.



Emails can be sent from Novtel, and the type will be displayed as 'Email Out'.

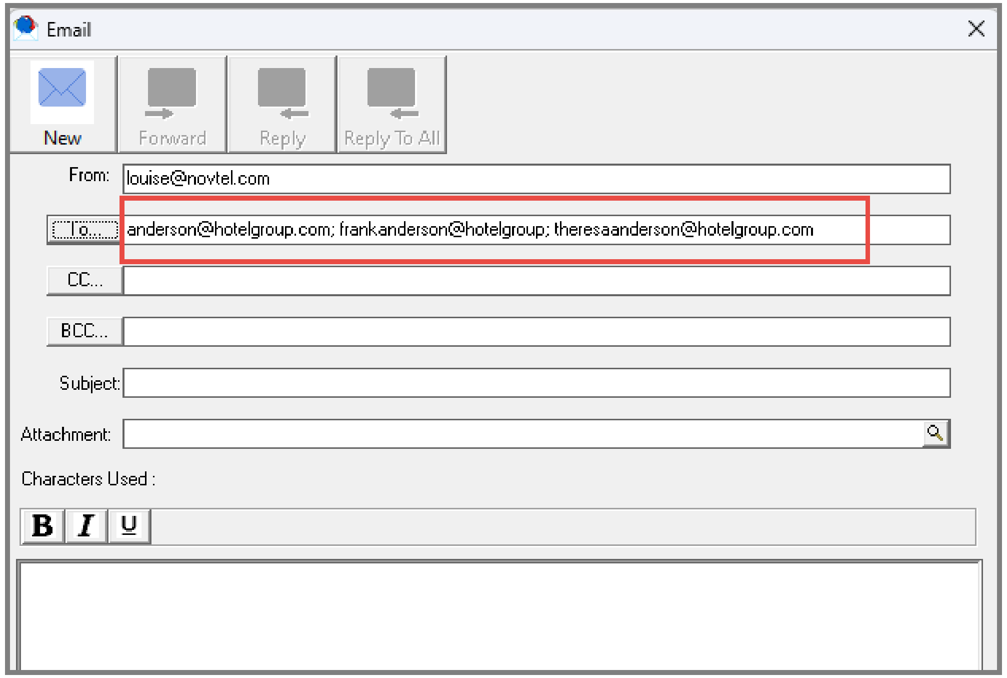
Emails imported from Outlook will be displayed as 'Email In' in the 'Communications' section.

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.

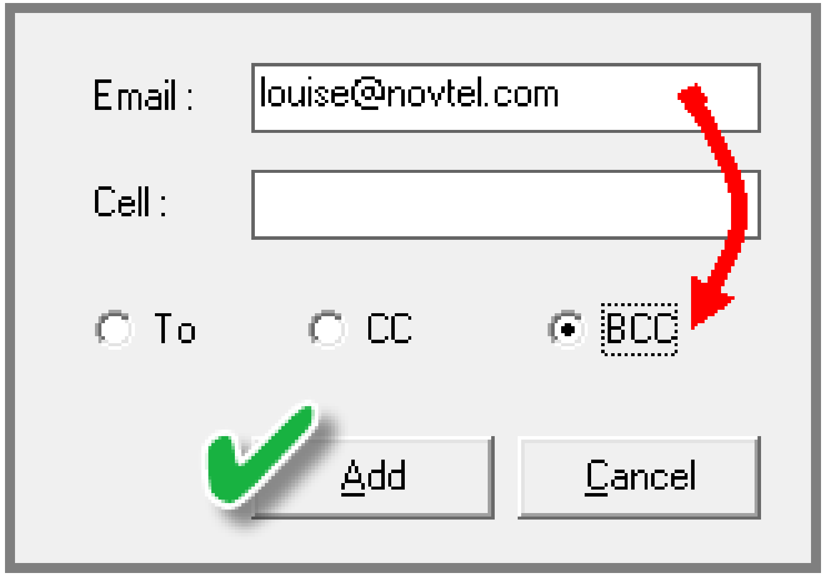


Email and/or SMS Communication

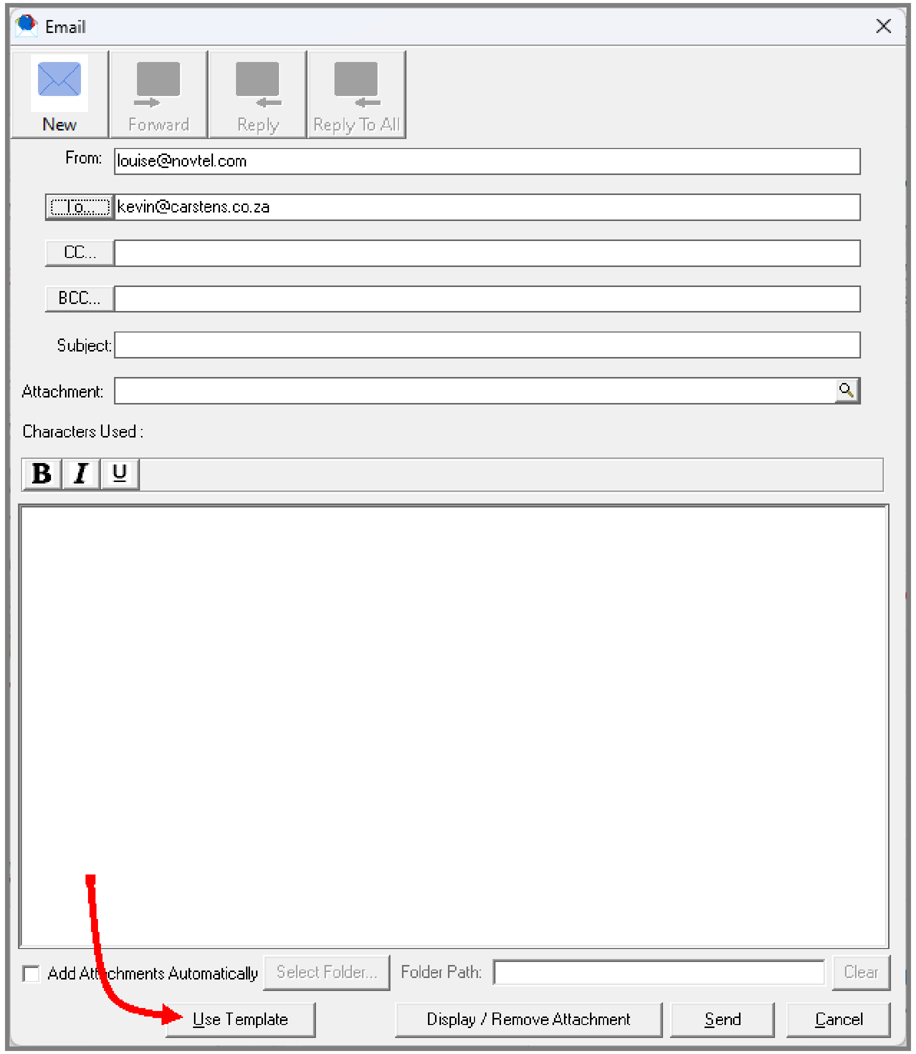
If required, an email address can be removed from the Email screen to exclude it.

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.

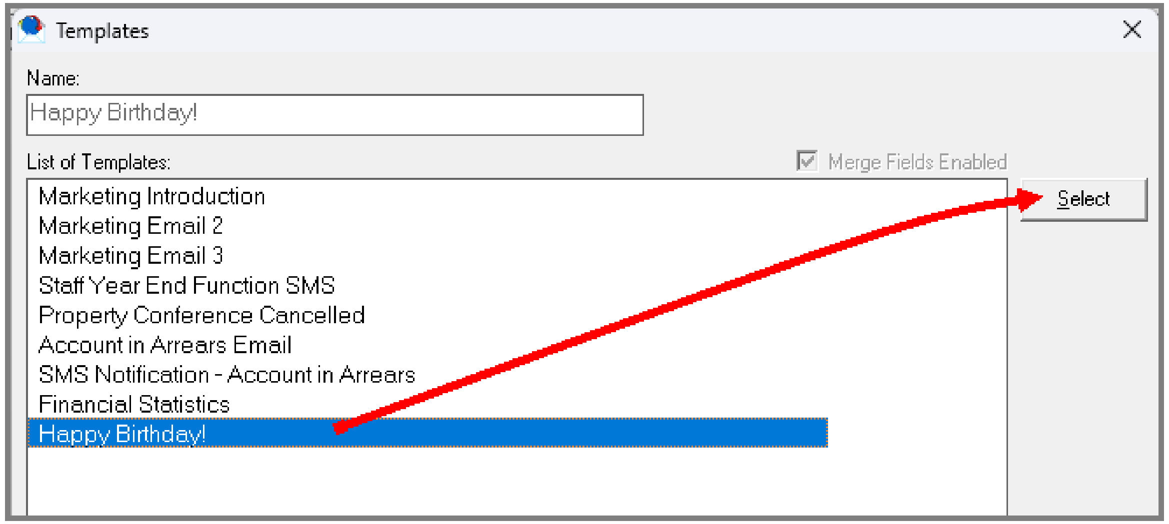


Email and/or SMS Communication

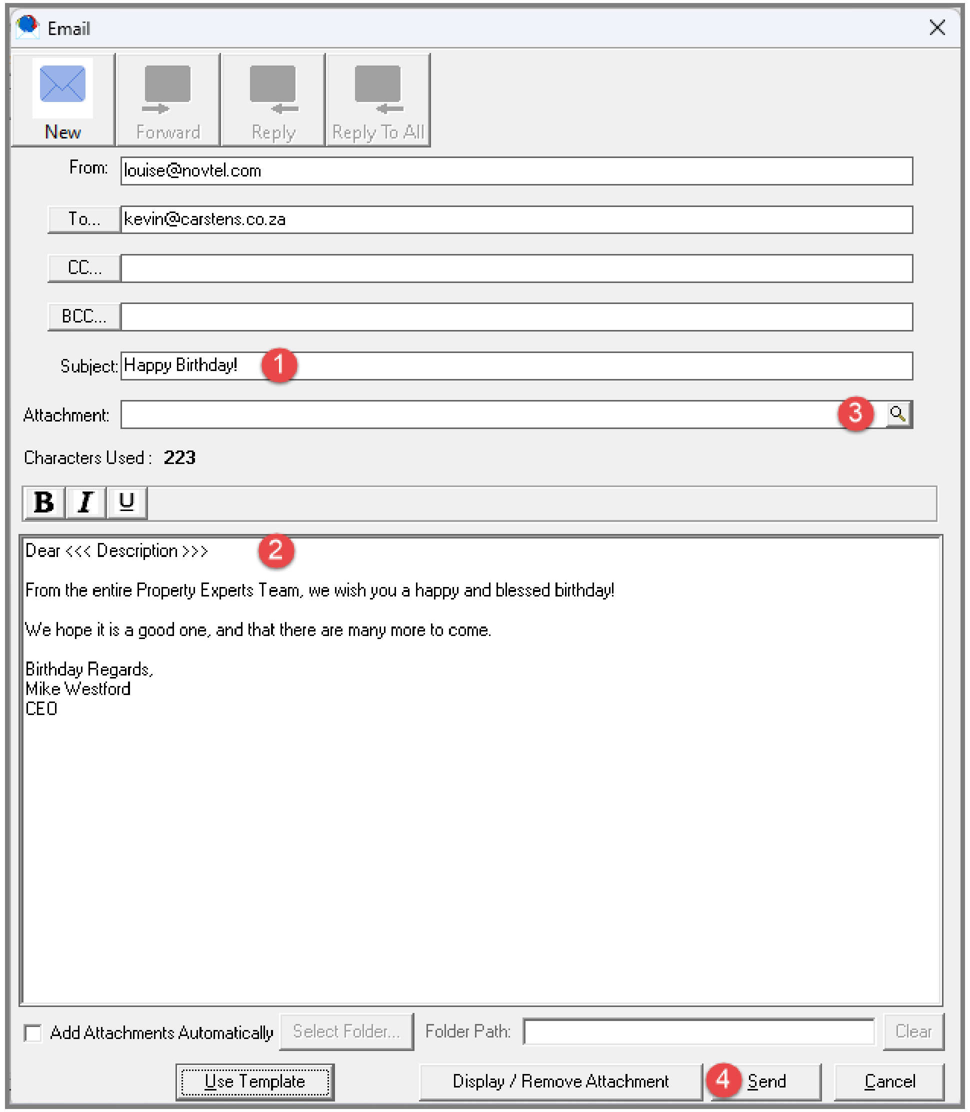


In the ‘Email’ window, click on the ‘Use Template’ button.

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

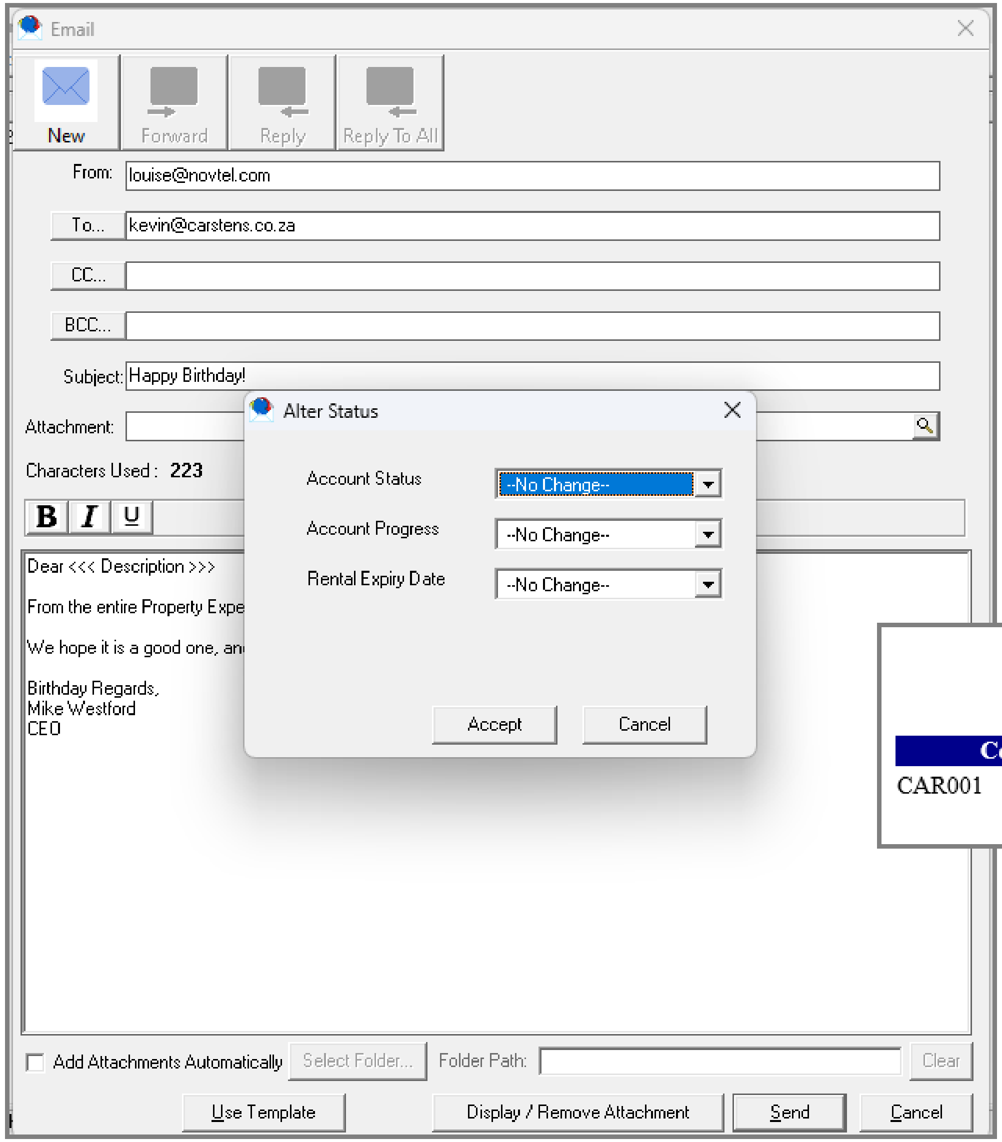


Email and/or SMS Communication



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



If required, the statuses can be amended and saved.

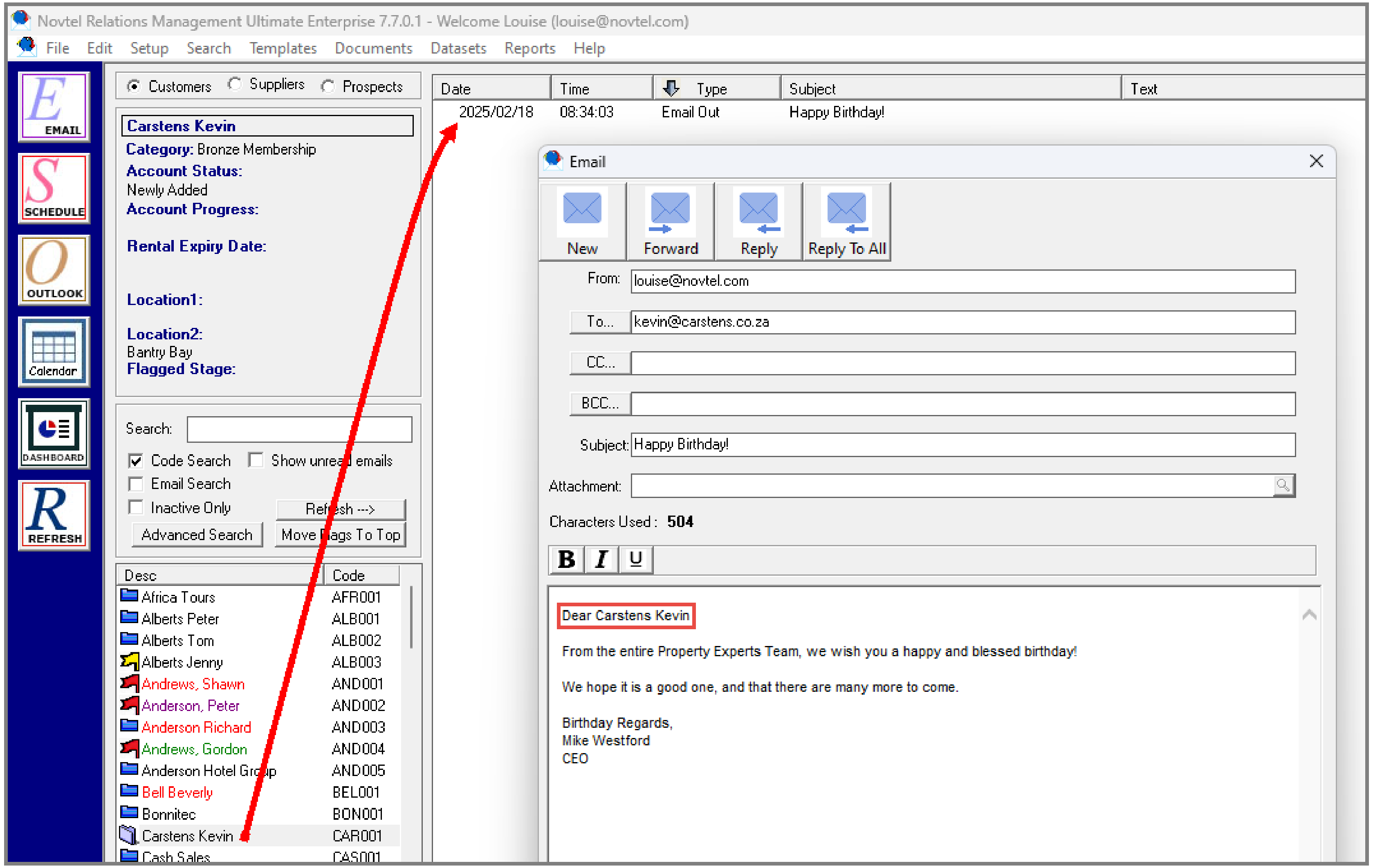
If activated, the 'List of Outgoing Email / SMS' report will be generated in your browser.

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



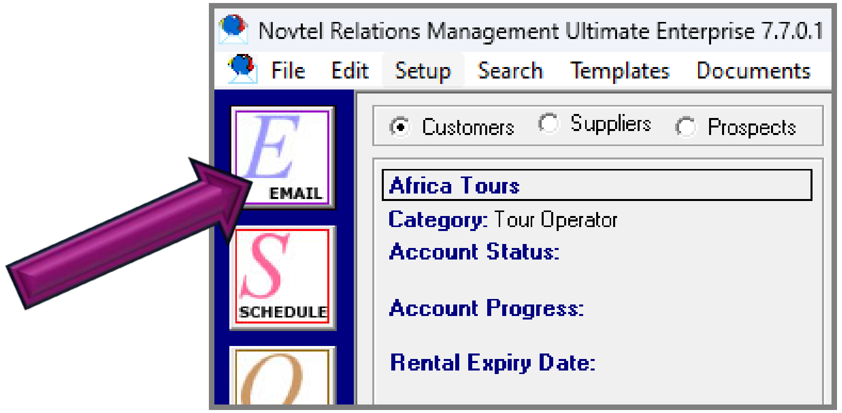
The email will now be captured to the account's communication screen, and can be accessed by double clicking on the communication.

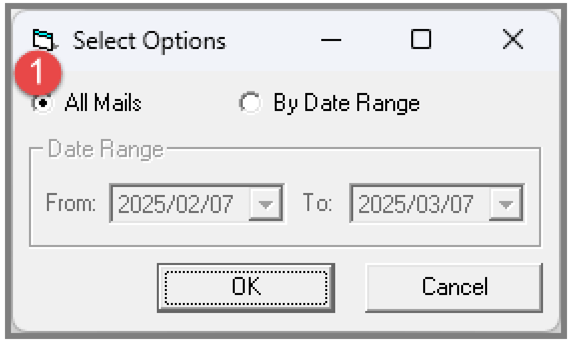
Note that the account description is now displayed instead of the 'Merged Field' option, <<<Description>>>.

Email and/or SMS Communication

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

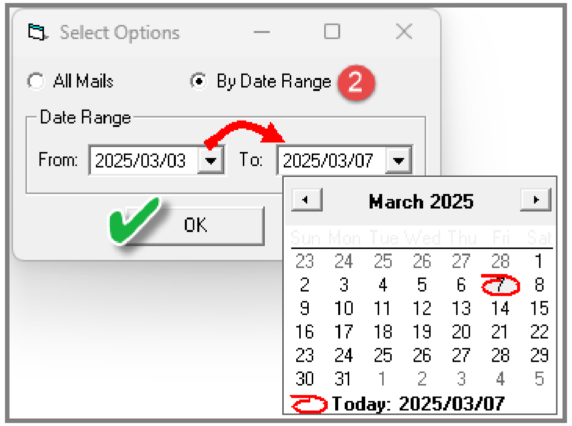
Clicking on the 'Email' Icon, one of 2 options can be selected, namely:





1. All Emails

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



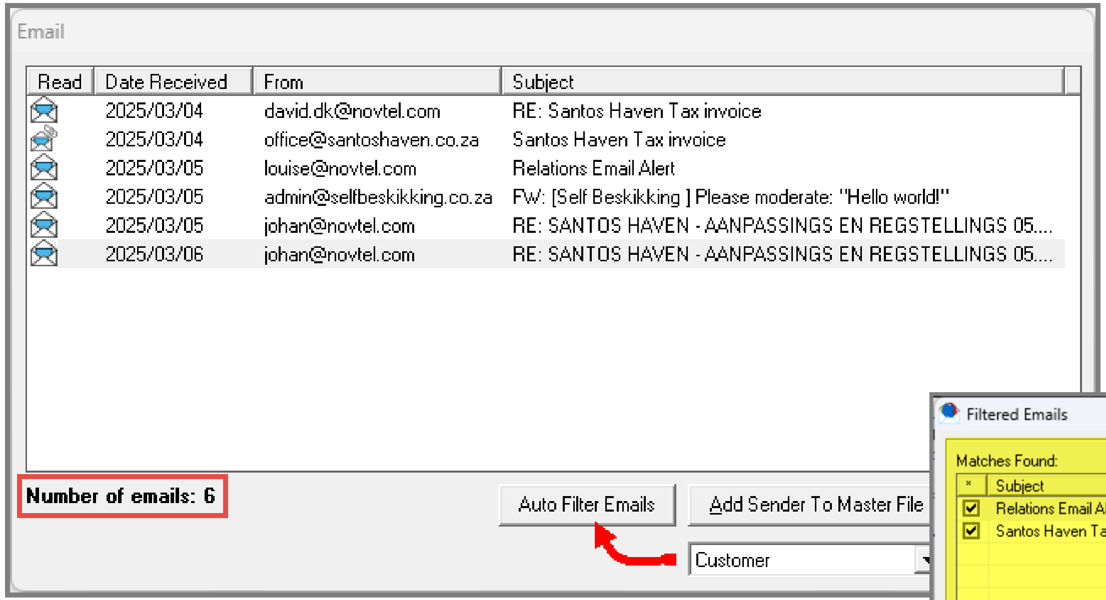
2. By Date Range

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

For example:

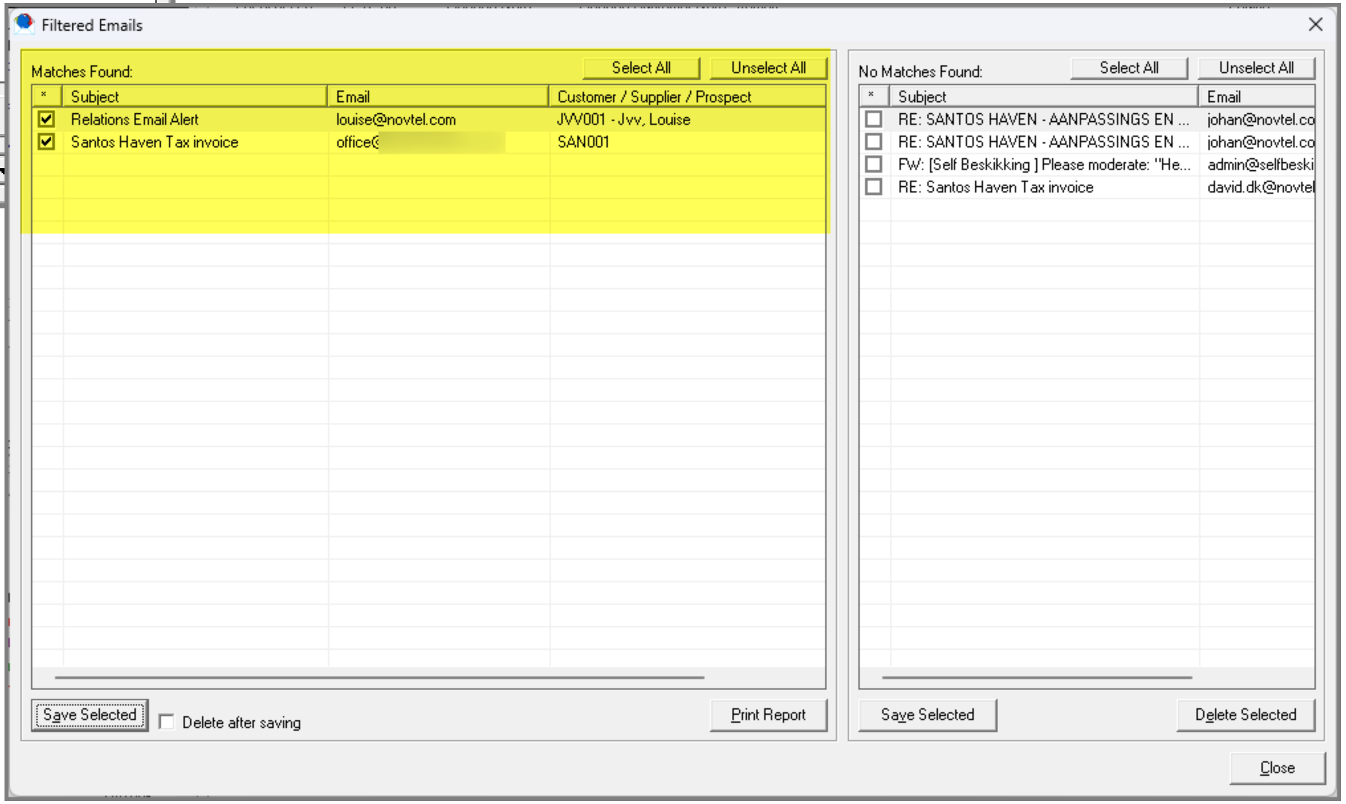
Emails received during the past 5 days only.

Email and/or SMS Communication

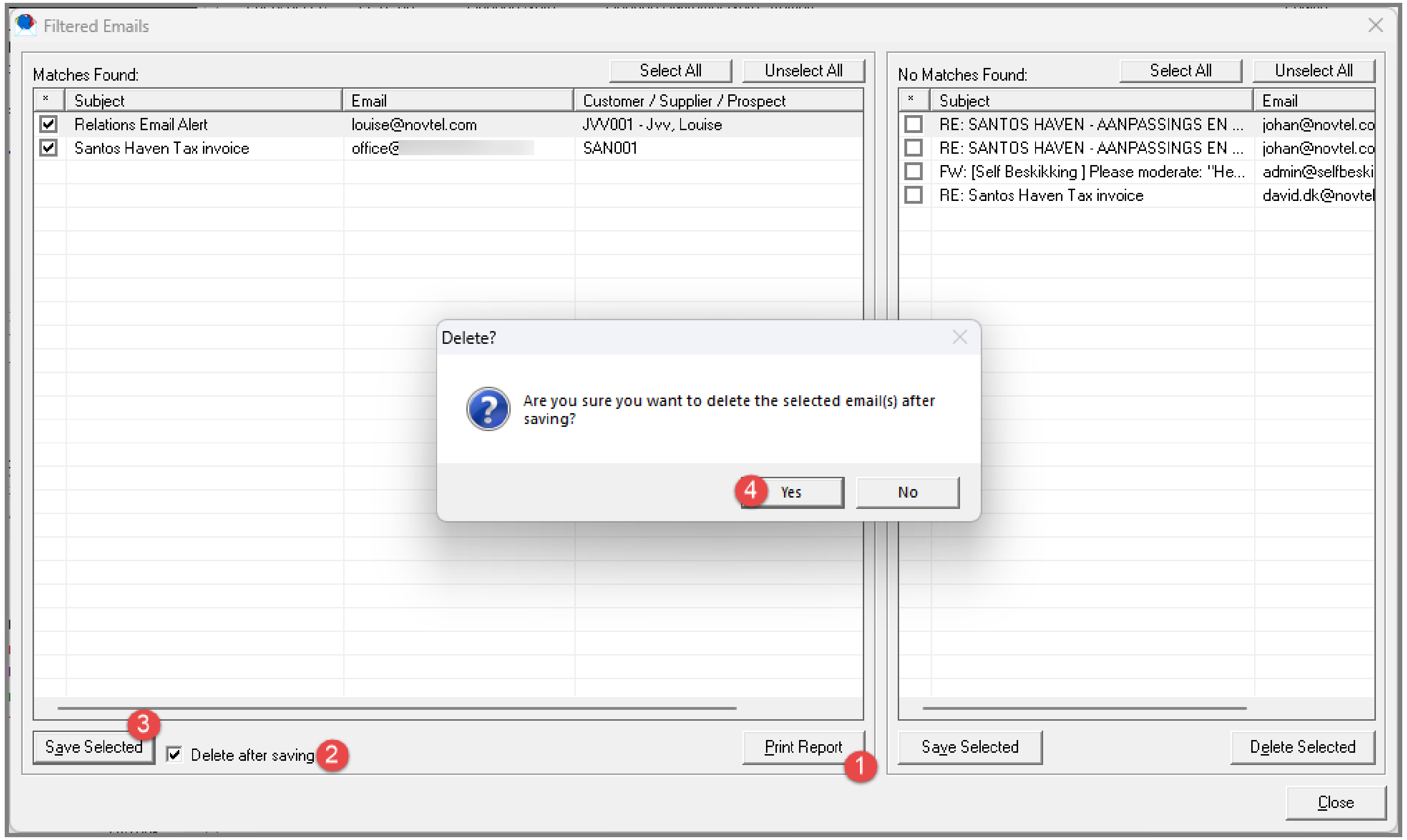


Only emails received within the selected period, will be displayed here, and will be imported to either the relevant **account** of the Customer, Supplier or Prospect Communications window.

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.

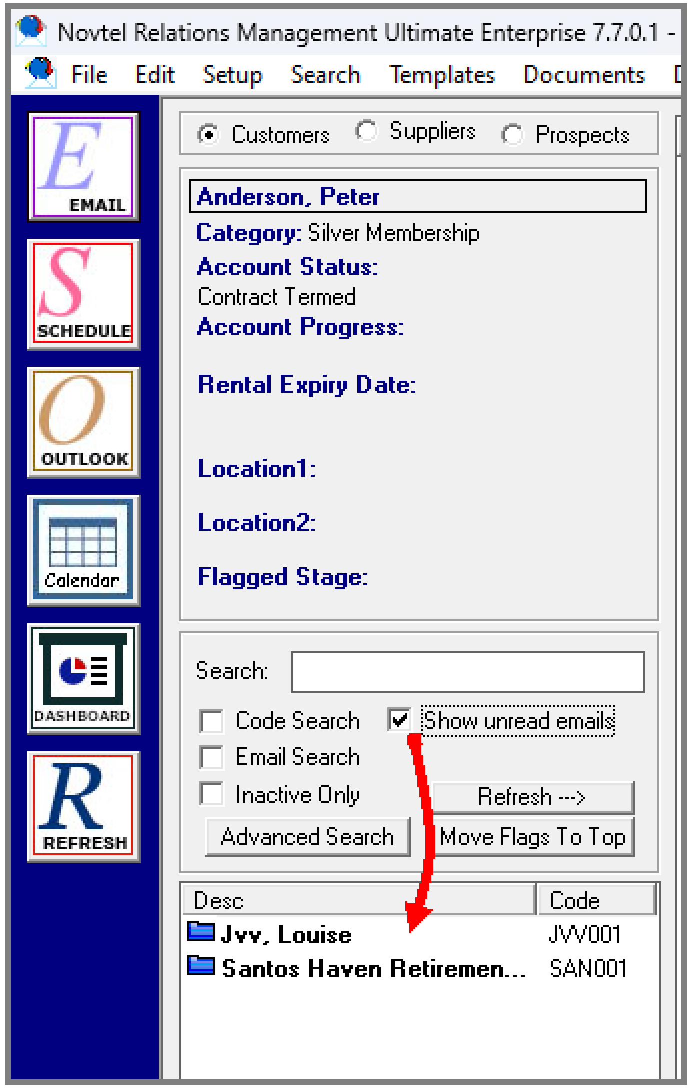


Email and/or SMS Communication



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 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.

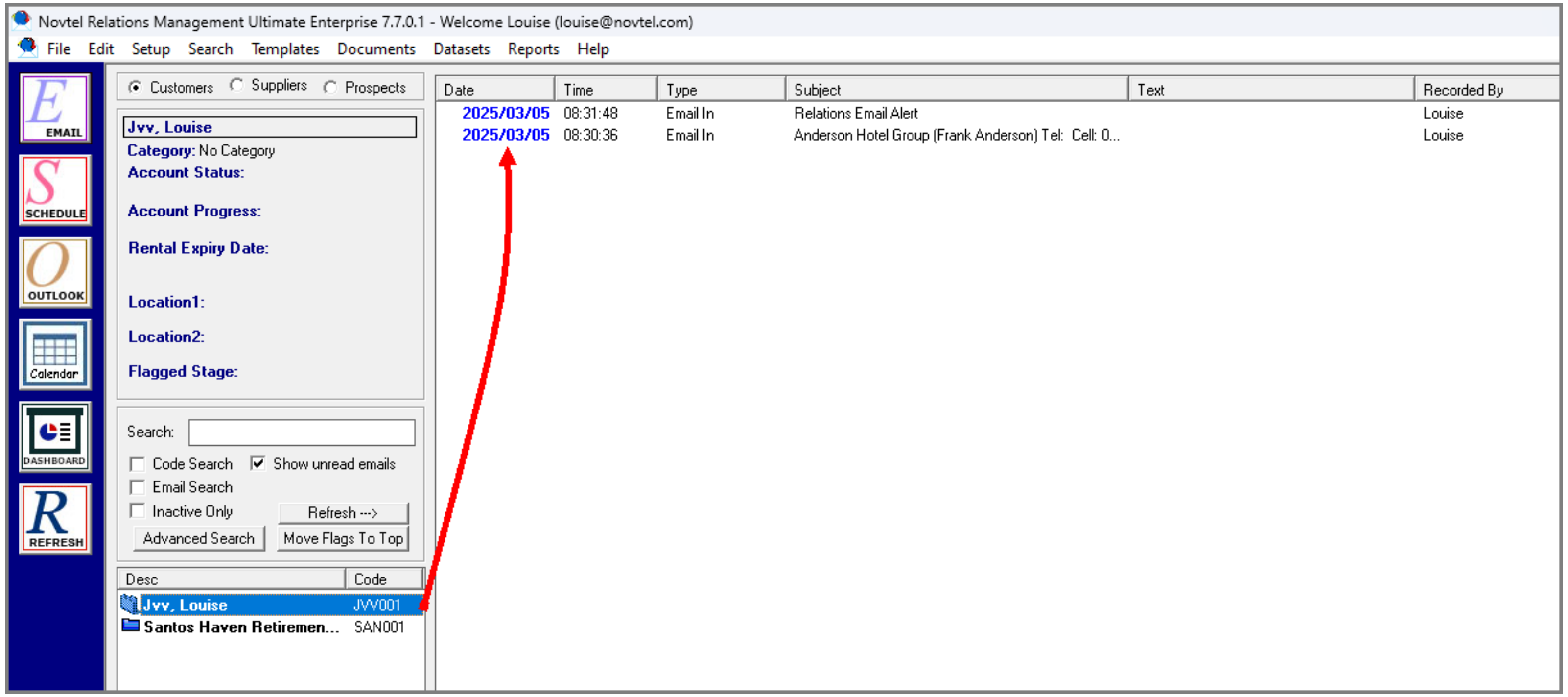
Email and/or SMS Communication



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**'.

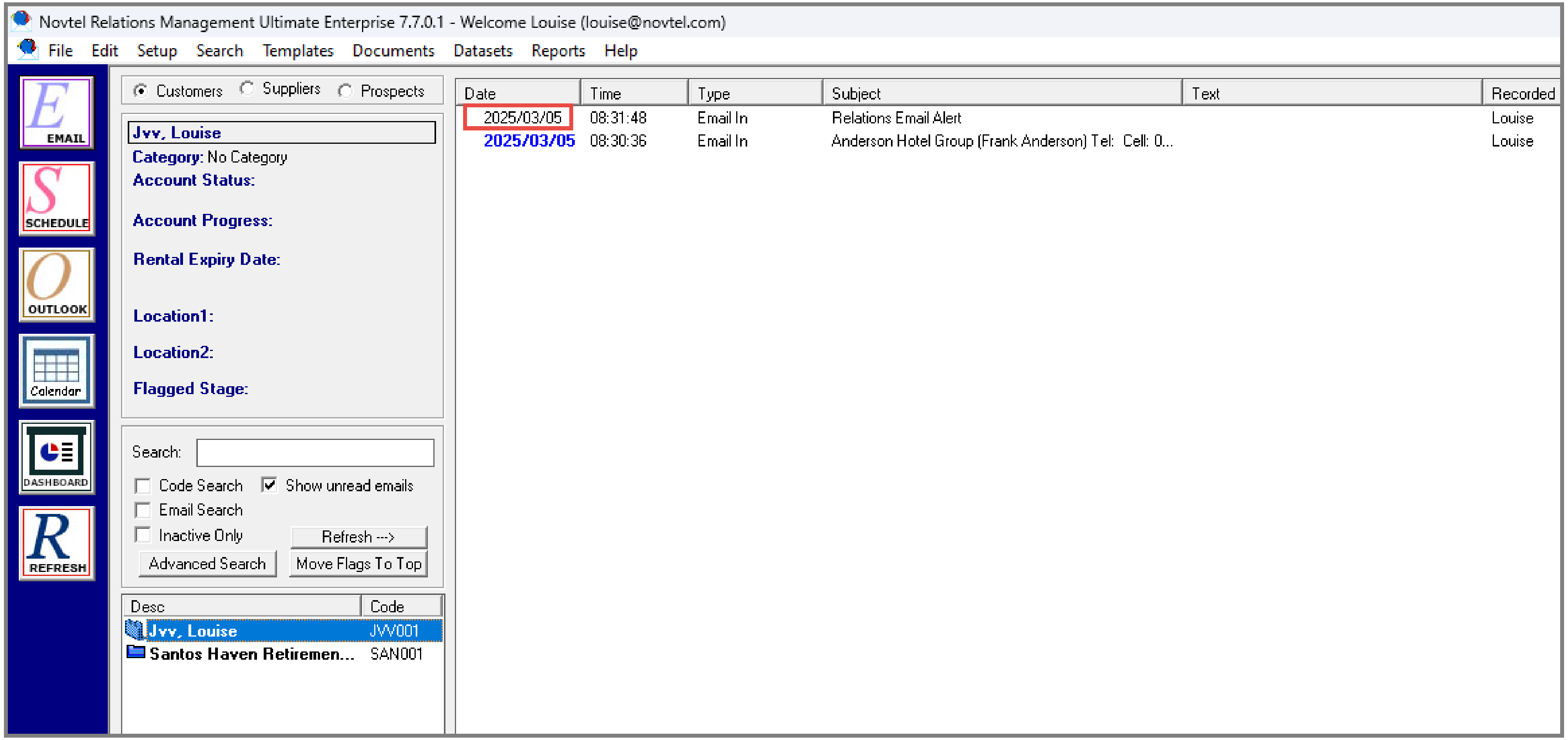


Image by wahyu_t on Freepik

Novtel®

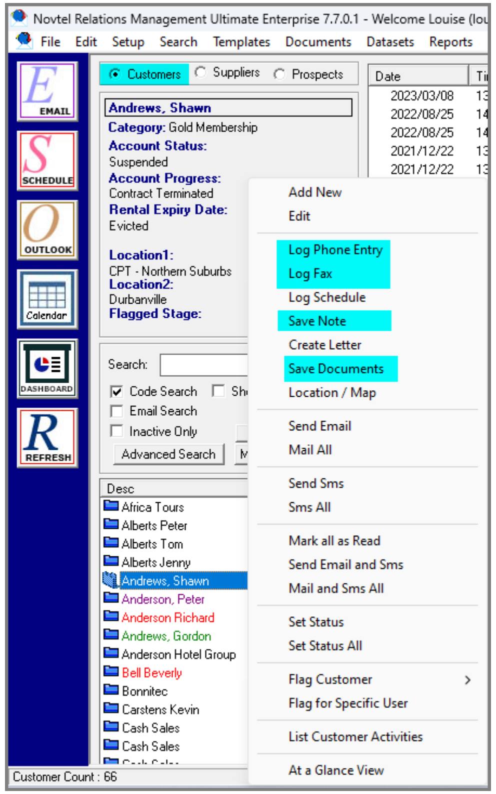
Relations Management

4

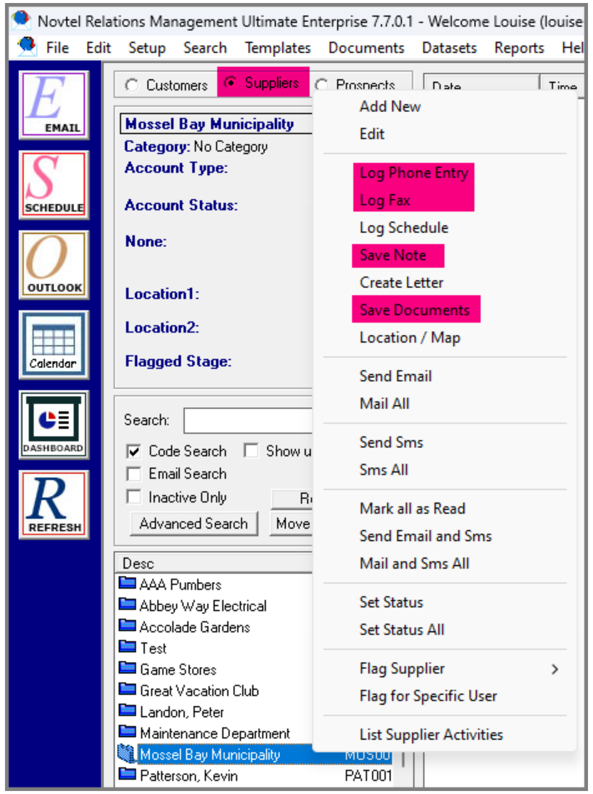
Logging Notes on Phone Conversations; Logging other Notes and Saving Documents

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

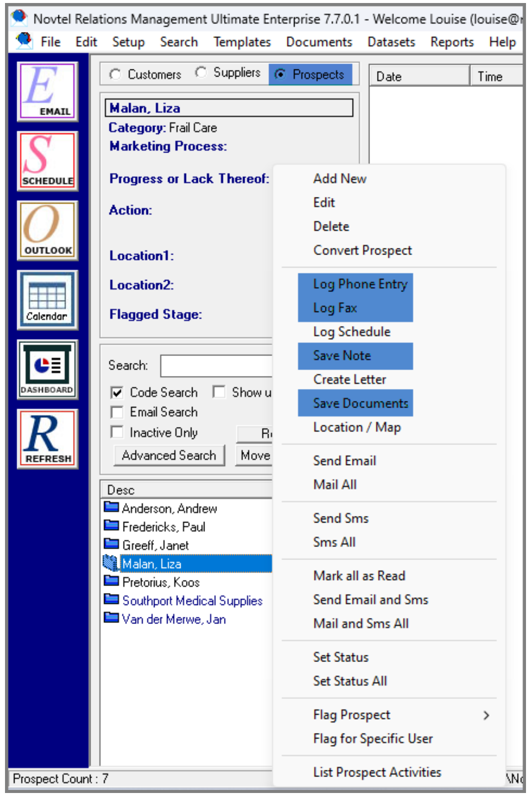
Customers



Suppliers



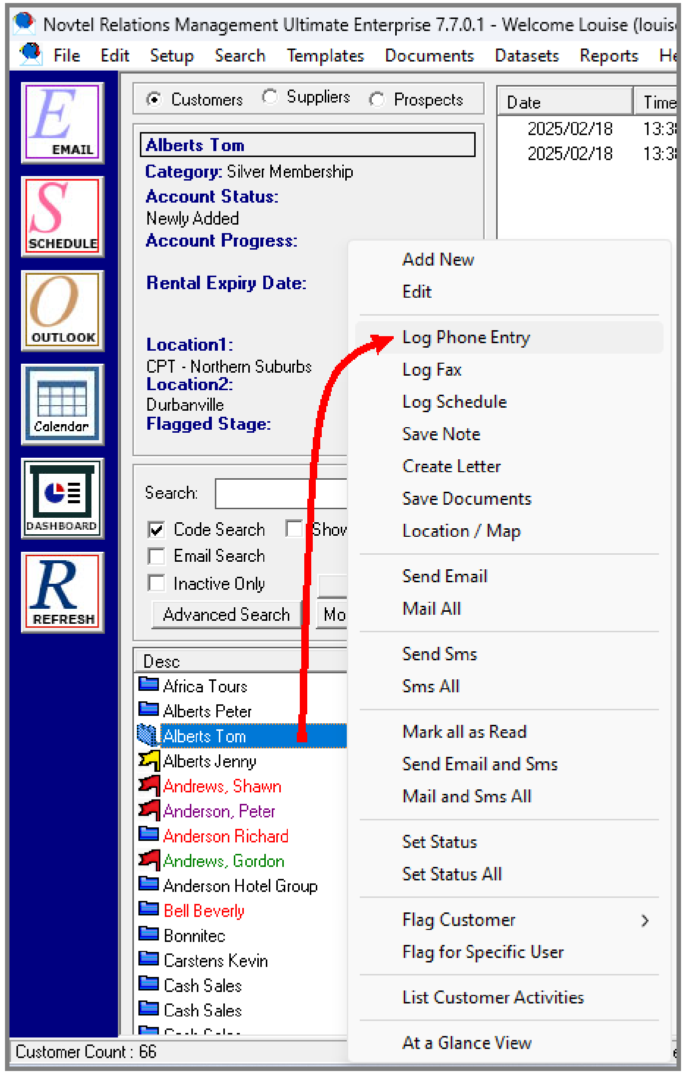
Prospects



Per account the following actions can be performed:

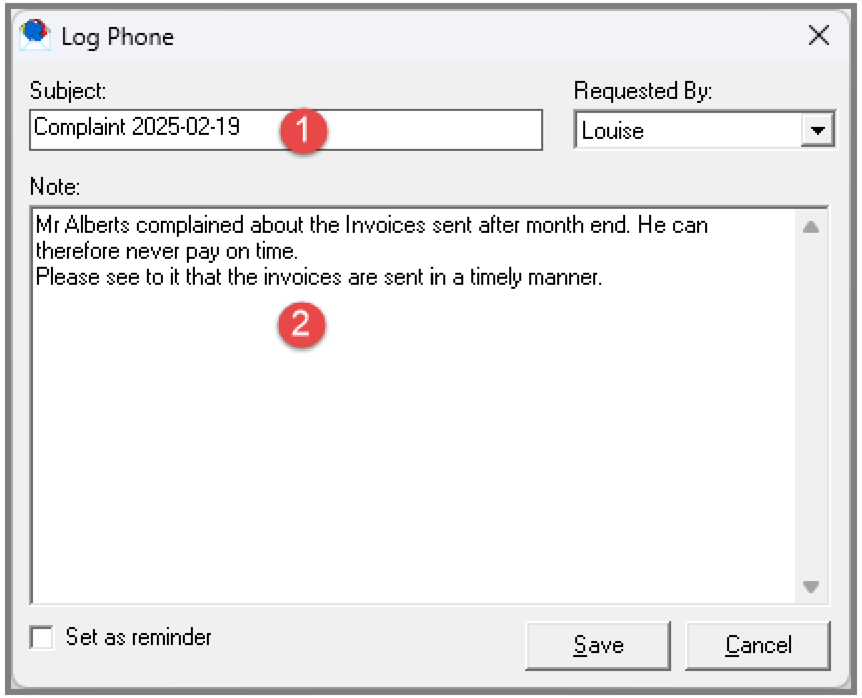
- ✓ Notes on phone conversations can be saved;
- ✓ If a fax was received, it can be logged to the account;
- ✓ Notes can be captured and if selected, reminders can be set and a task logged when saving the note;
- ✓ Documents such as contracts; receipts and invoices can be saved.

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

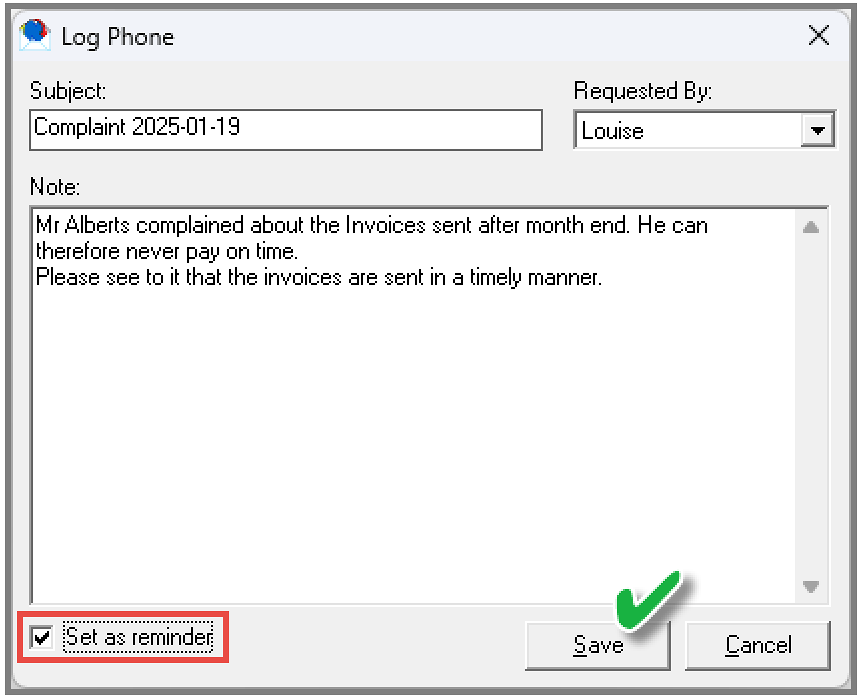


Right-clicking on a specific account and selecting the ‘Log Phone Entry’ option, the ‘Log Phone’ screen is displayed.

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.

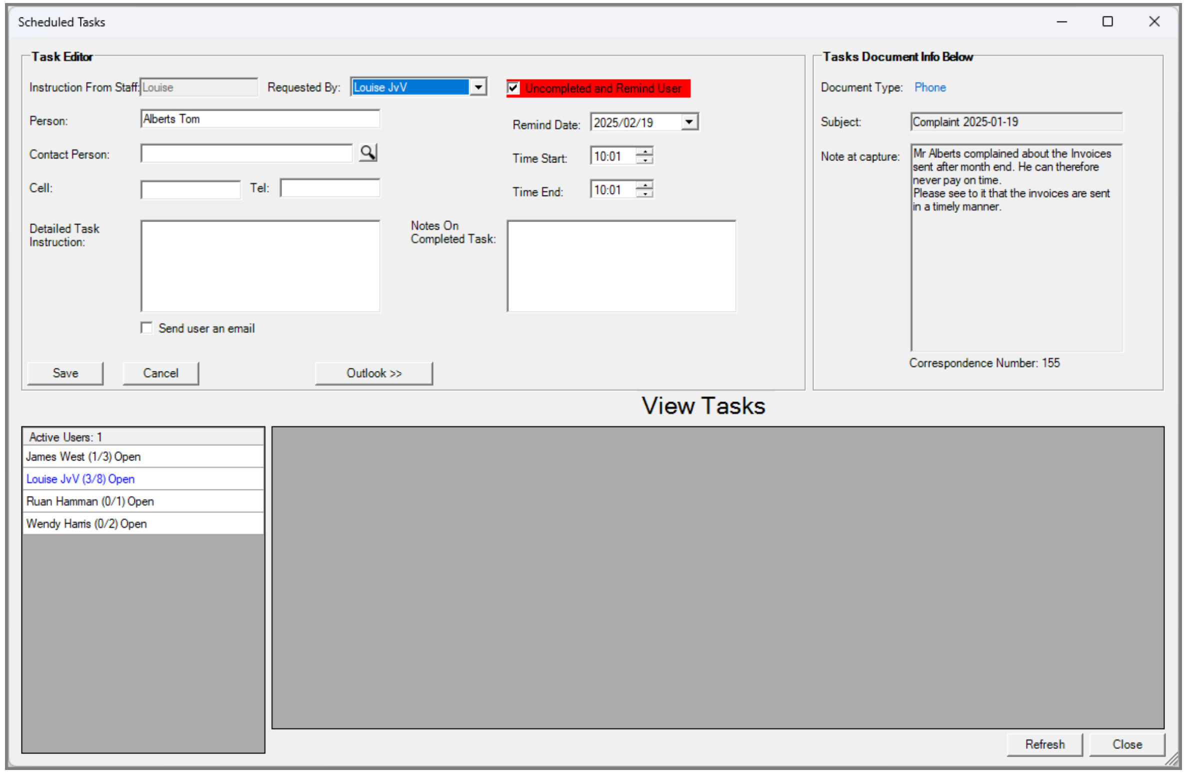


Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

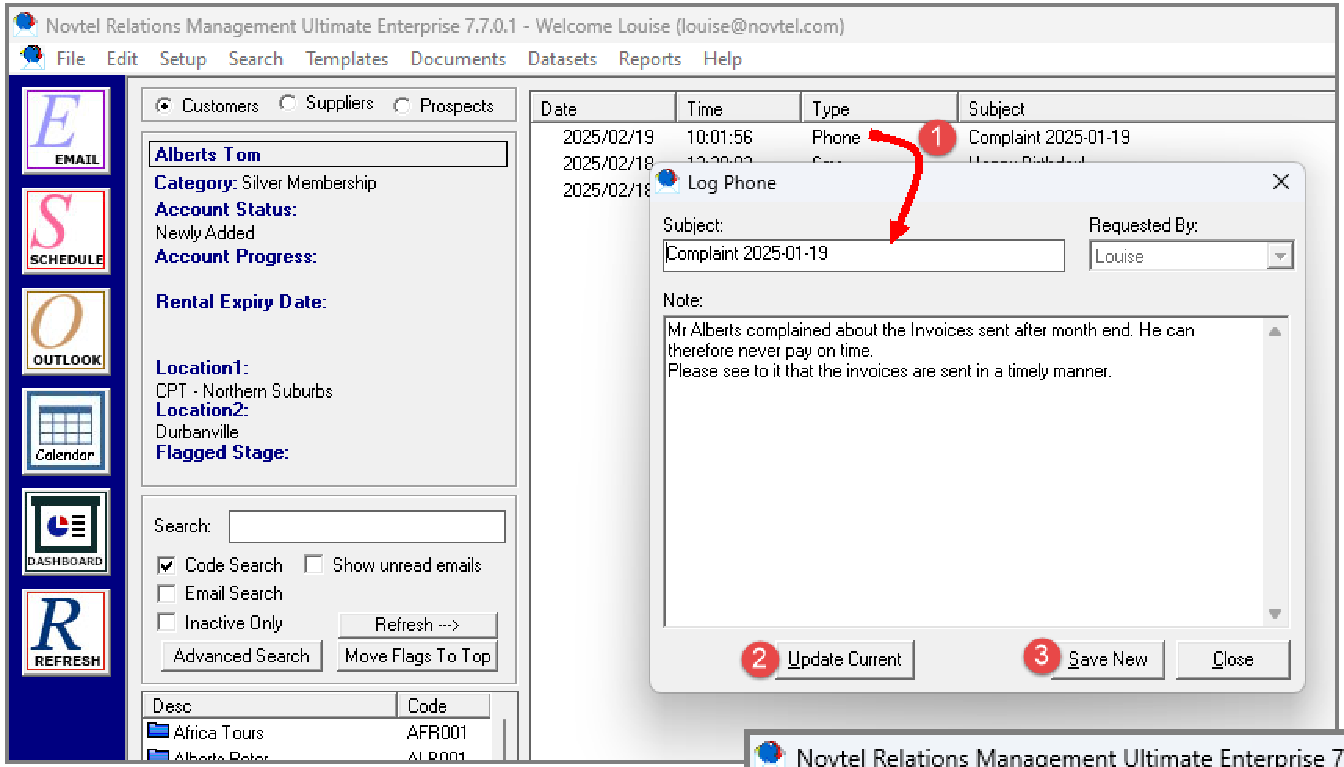


To be reminded of an action to be taken, the ‘Set Reminder’ checkbox is ticked before clicking ‘Save’.

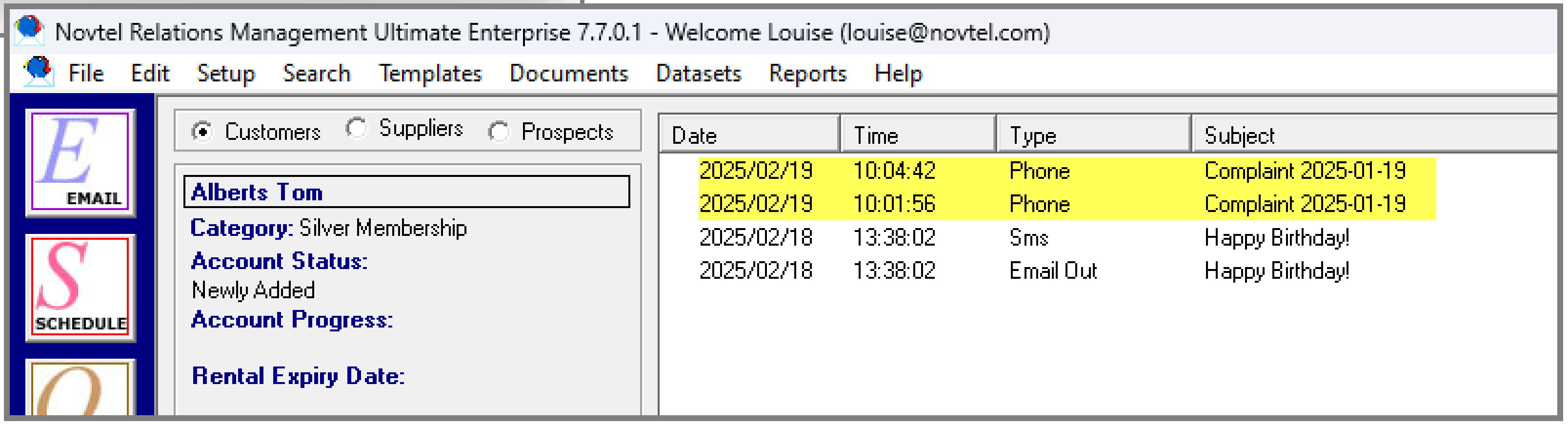
The ‘Scheduled Tasks’ window will be opened, and a task can now be scheduled, and a reminder set.



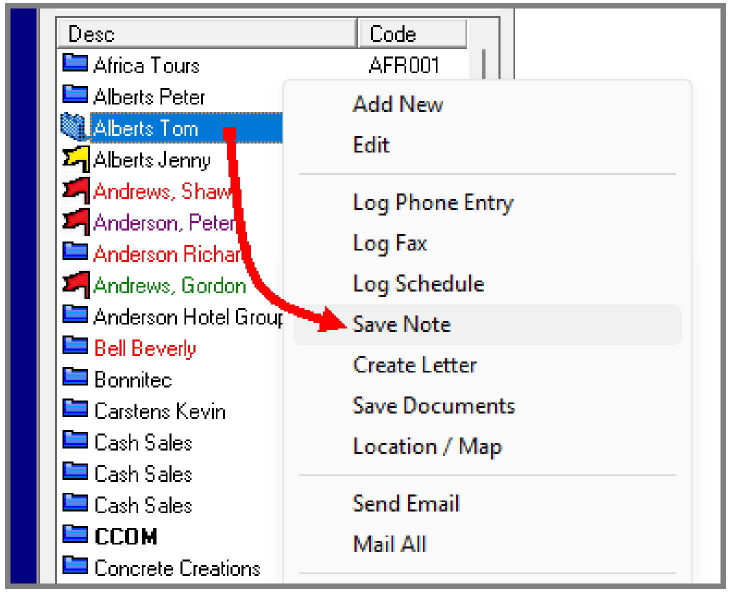
Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents



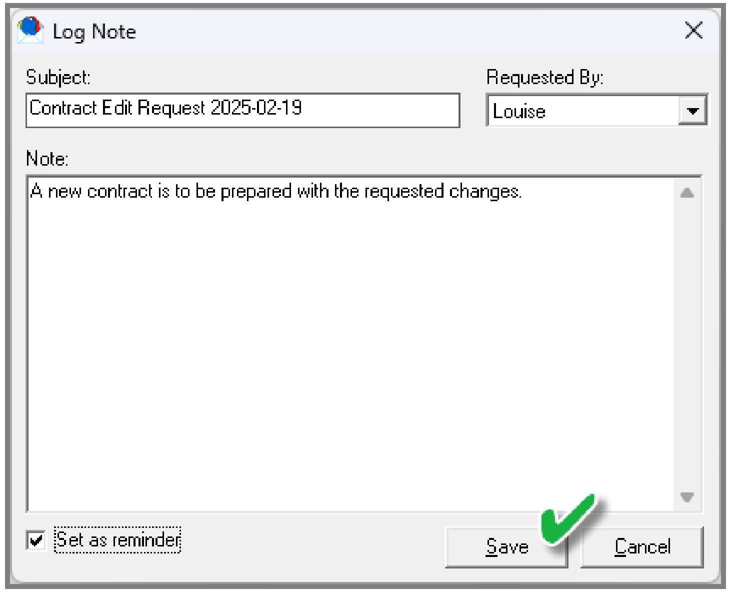
1. The logged phone entry is now captured to the selected account, and by double clicking on the line, the logged entry is opened.
2. If required, the entry can be amended. If you wish to update the existing entry without creating a new line item, the ‘Update Current’ button is clicked after making the 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.

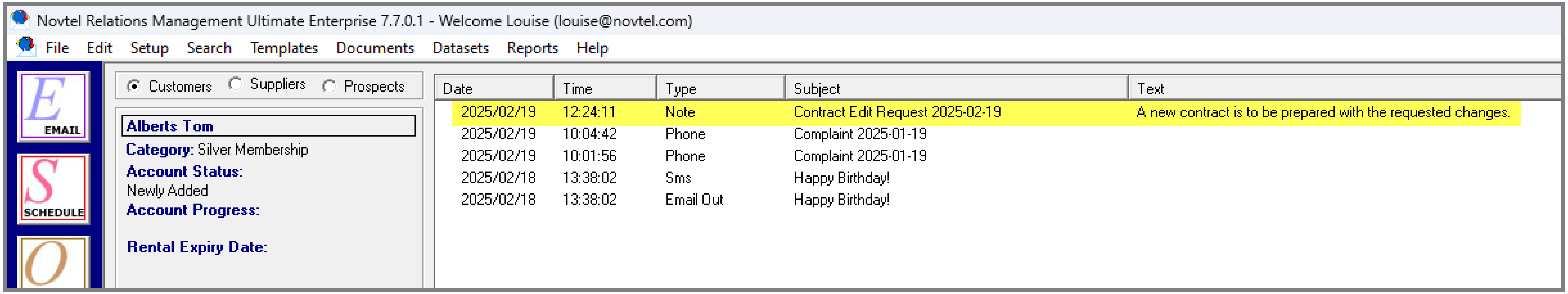


Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

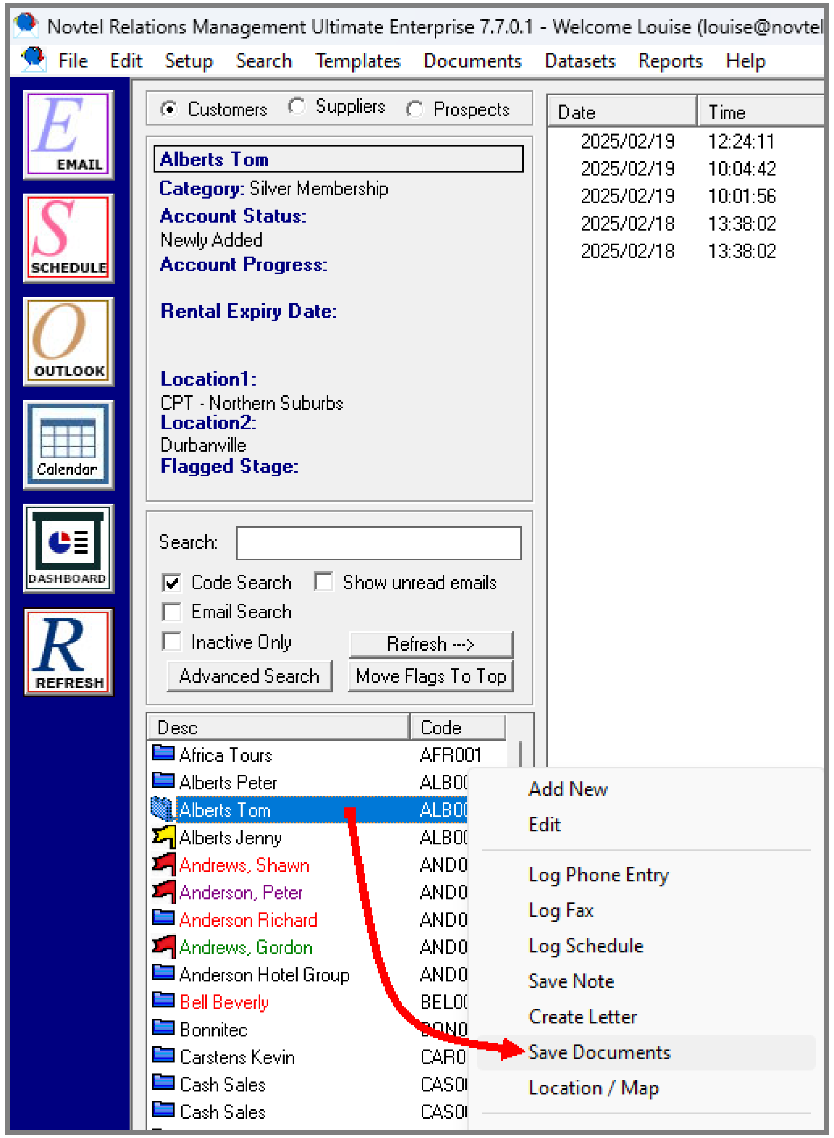


The exact same principles apply to saving a note, and the saved note will then be displayed at the top of the list in the Account's Communications window, from where it can be accessed, viewed, and if required, altered and re-saved.



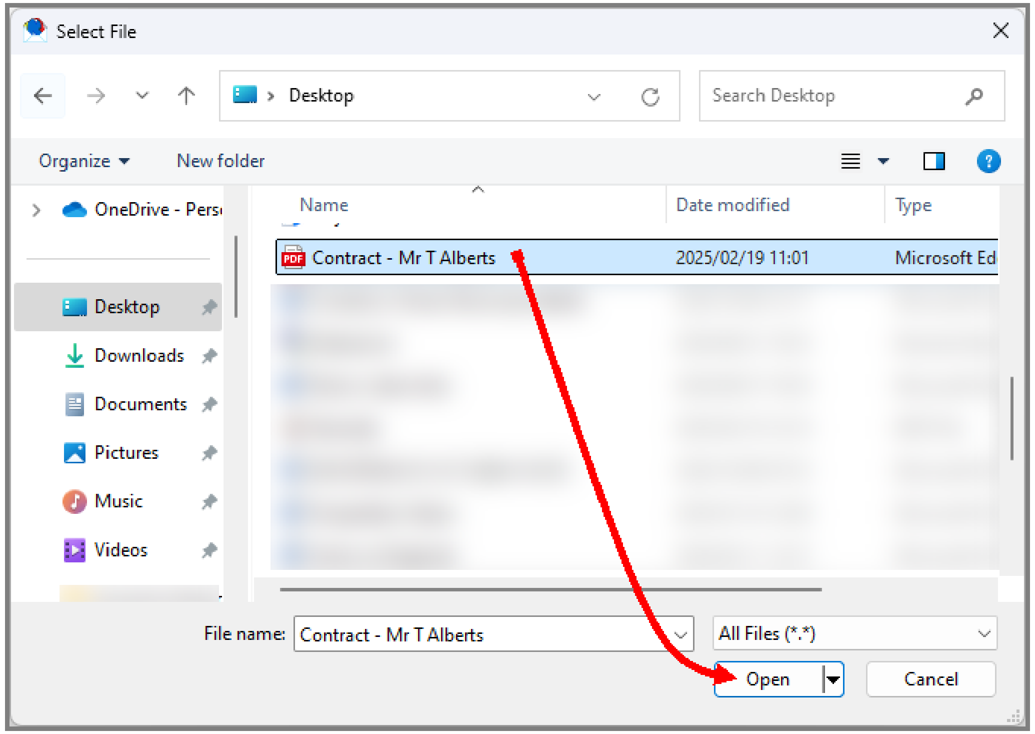


Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents



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.

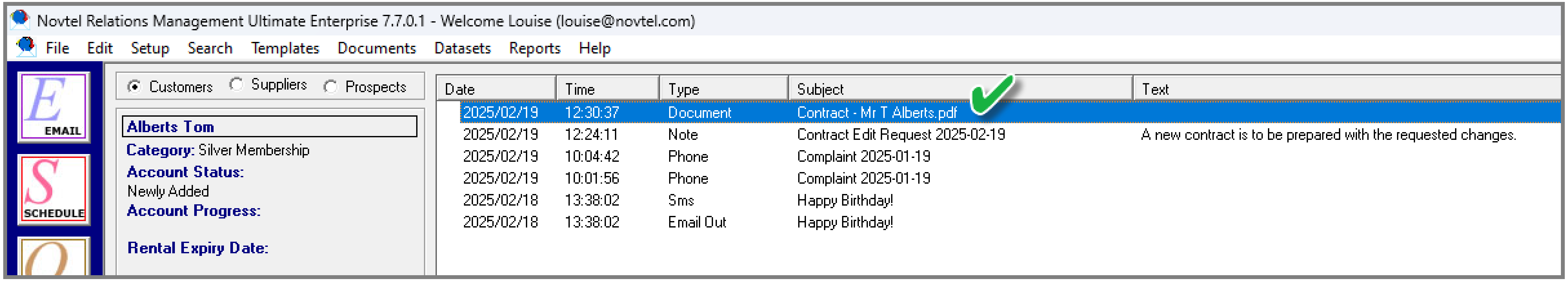
Simply browse for the location where the document is stored and select it.



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.

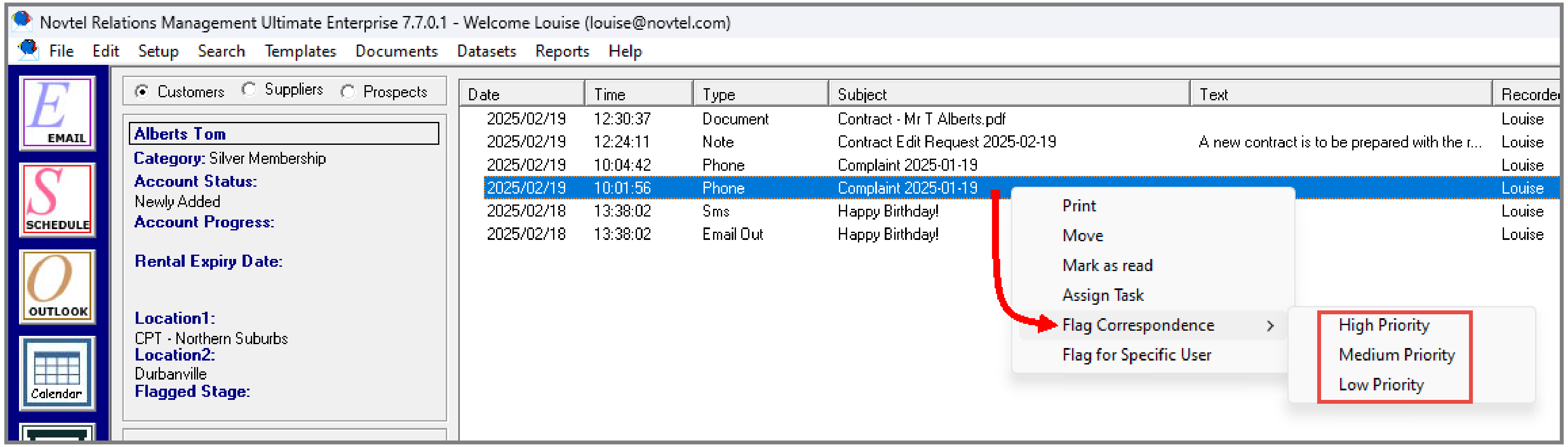
Double-clicking on the saved document, it is opened

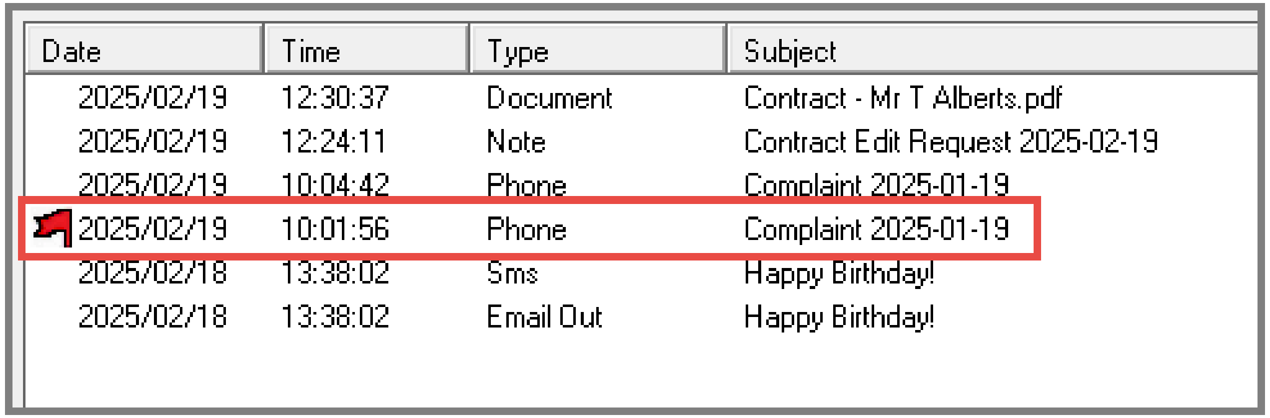


Logging Notes on Phone Conversations; Logging Other Notes and Saving Documents

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

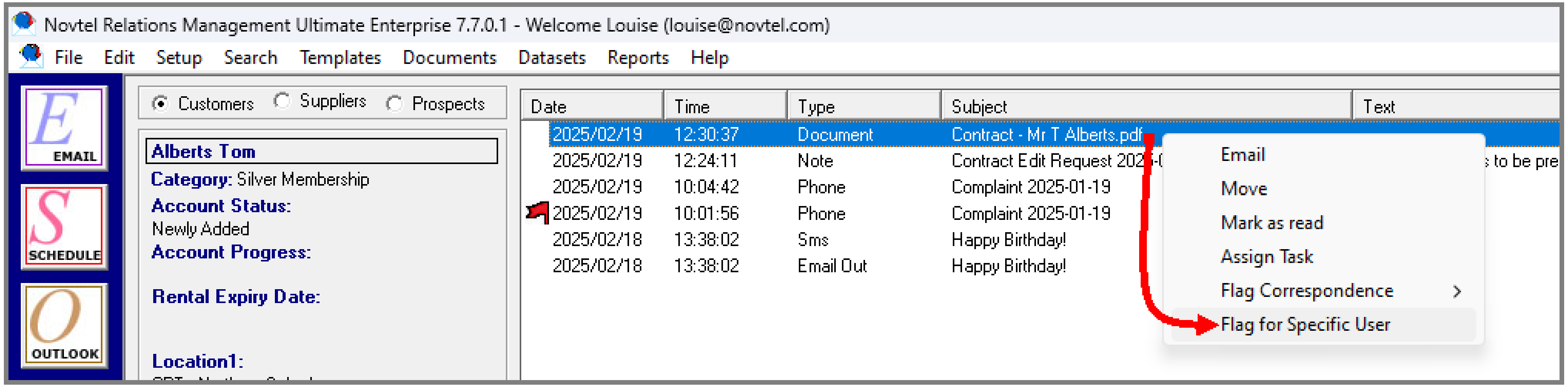
In doing so, the 'Set Flag Stage' window is opened and the applicable Flag Stages under the selected priority level can be set, and a note saved.





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.



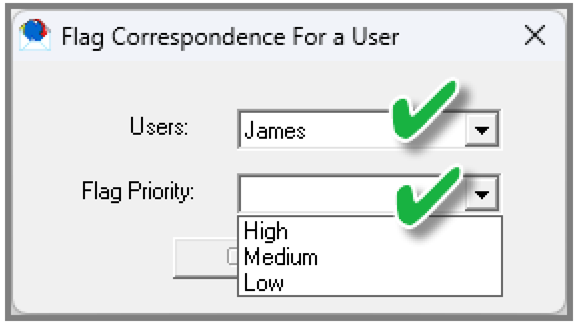


Image by wahyu_t on Freepik

Relations Management

5

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.

Customers

- Main Status 1
  - Sub-Status 1.1
  - Sub-Status 1.2
  - Sub-Status 1.3
- Main Status 2
  - Sub-Status 2.1
  - Sub-Status 2.2
  - Sub-Status 2.3
- Main Status 3
  - Sub-Status 3.1
  - Sub-Status 3.2
  - Sub-Status 3.3.

Suppliers

- Main Status 1
  - Sub-Status 1.1
  - Sub-Status 1.2
  - Sub-Status 1.3
- Main Status 2
  - Sub-Status 2.1
  - Sub-Status 2.2
  - Sub-Status 2.3
- Main Status 3
  - Sub-Status 3.1
  - Sub-Status 3.2
  - Sub-Status 3.3.

Prospects

- Main Status 1
  - Sub-Status 1.1
  - Sub-Status 1.2
  - Sub-Status 1.3
- Main Status 2
  - Sub-Status 2.1
  - Sub-Status 2.2
  - Sub-Status 2.3
- Main Status 3
  - Sub-Status 3.1
  - Sub-Status 3.2
  - Sub-Status 3.3.

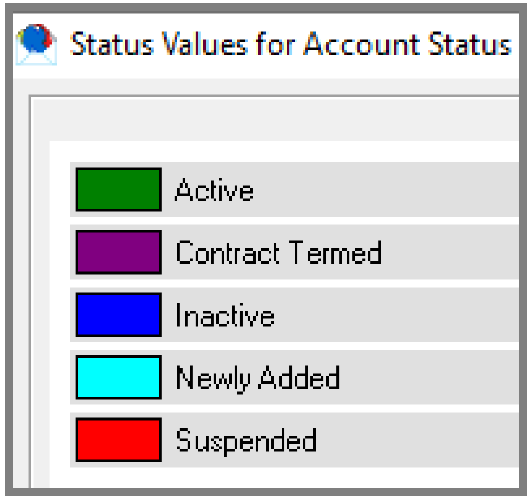
Statuses Explained

Examples of Customer Statuses and Sub-Statuses

Customer Main Status 1:
Account Status

↓

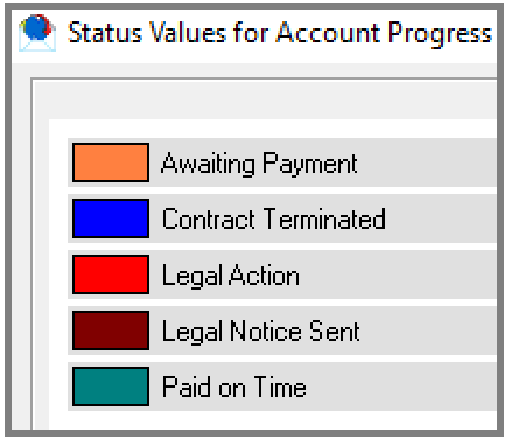
Customer Sub-Statuses Under Main Status 1



Customer Main Status 2:
Account Progress

↓

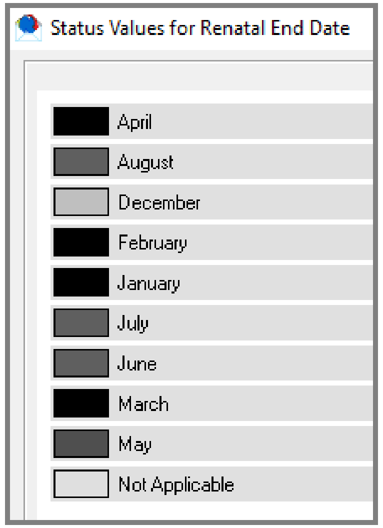
Customer Sub-Statuses Under Main Status 2



Customer Main Status 3:
Rental End date

↓

Customer Sub-Statuses Under Main Status 3



Statuses Explained

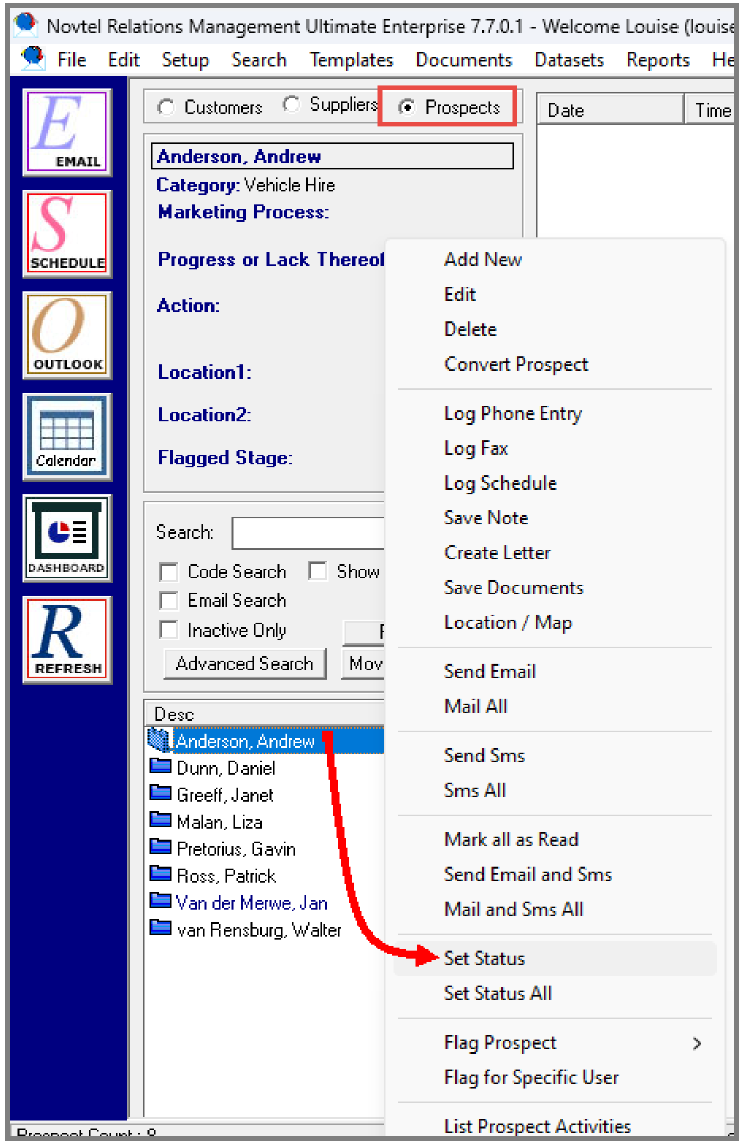
The main statuses alone will not be effective at all, and sub-statuses are needed to use this functionality successfully.

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

Sub-Statuses

- Prospect Main Status 1: **Marketing Process**
  - Introduction Email Sent
  - 2nd Email Sent
  - 3rd Email Sent
  - 4th Email Sent
- Prospect Main Status 2: **Progress or Lack Thereof**
  - Interested – Send more Info
  - Contact again in January
  - Contact again in February
  - DO NOT CONTACT – Not interested
  - Not Responding
- Prospect Main Status 3: **Action**
  - Prepare Contract
  - Contract Sent for Signing
  - Lost Cause

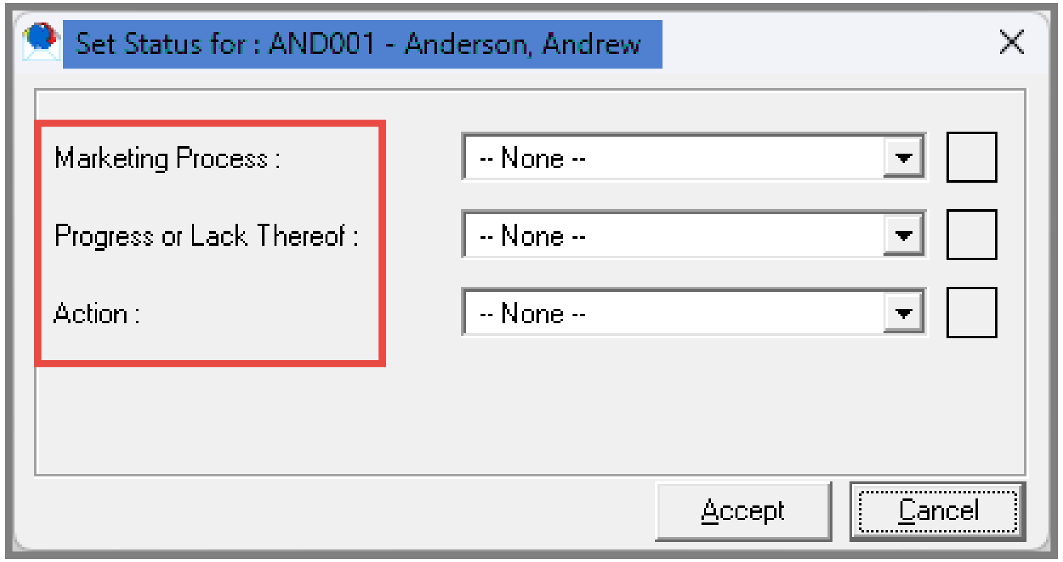
Statuses Explained



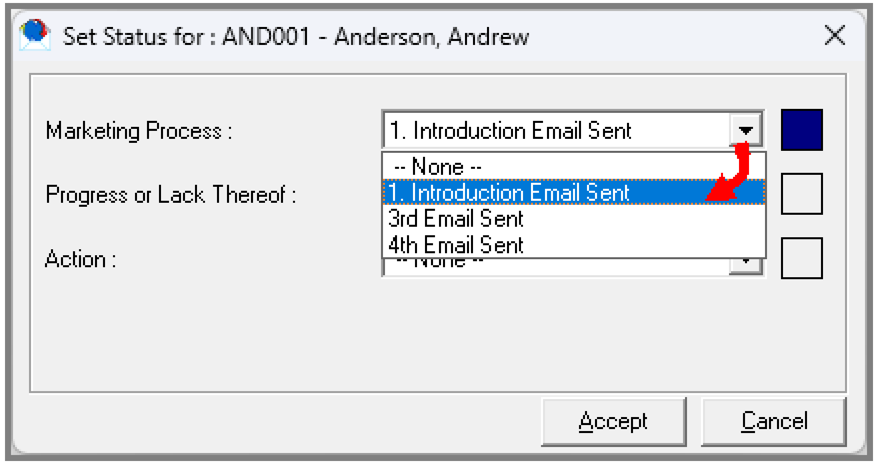
From the 'Prospects' window, a specific Prospect can be right-clicked and only this account's status changed as required, by selecting 'Set Status'.

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.

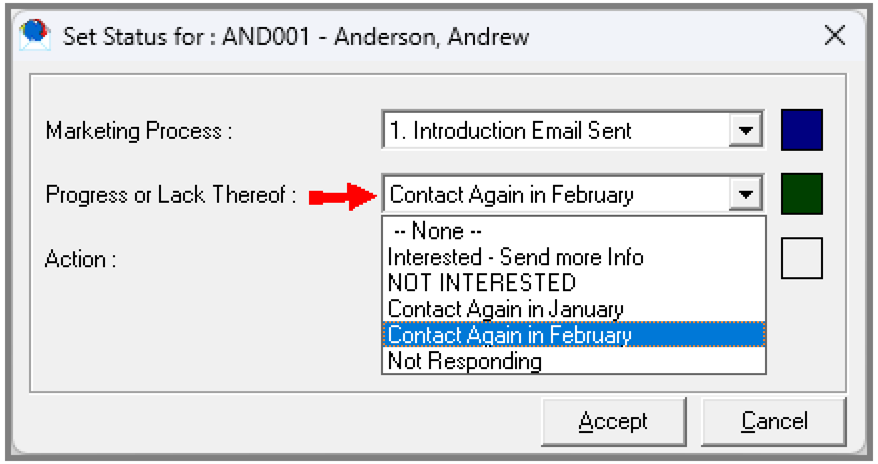


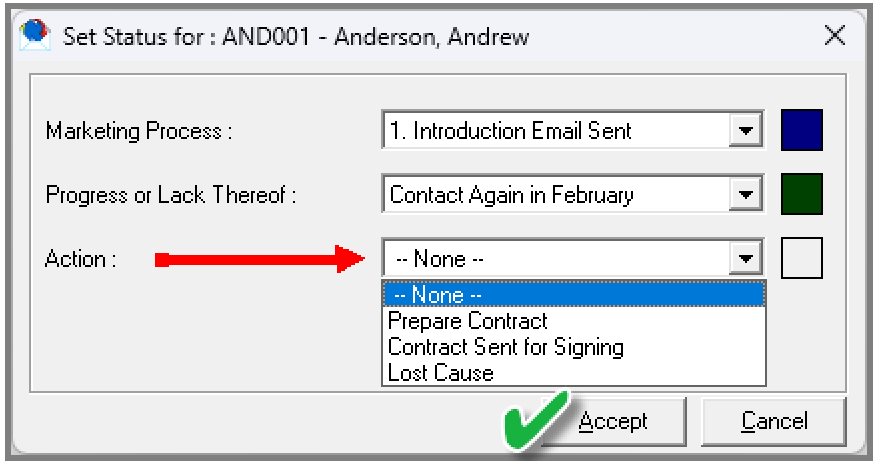
Statuses Explained



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.

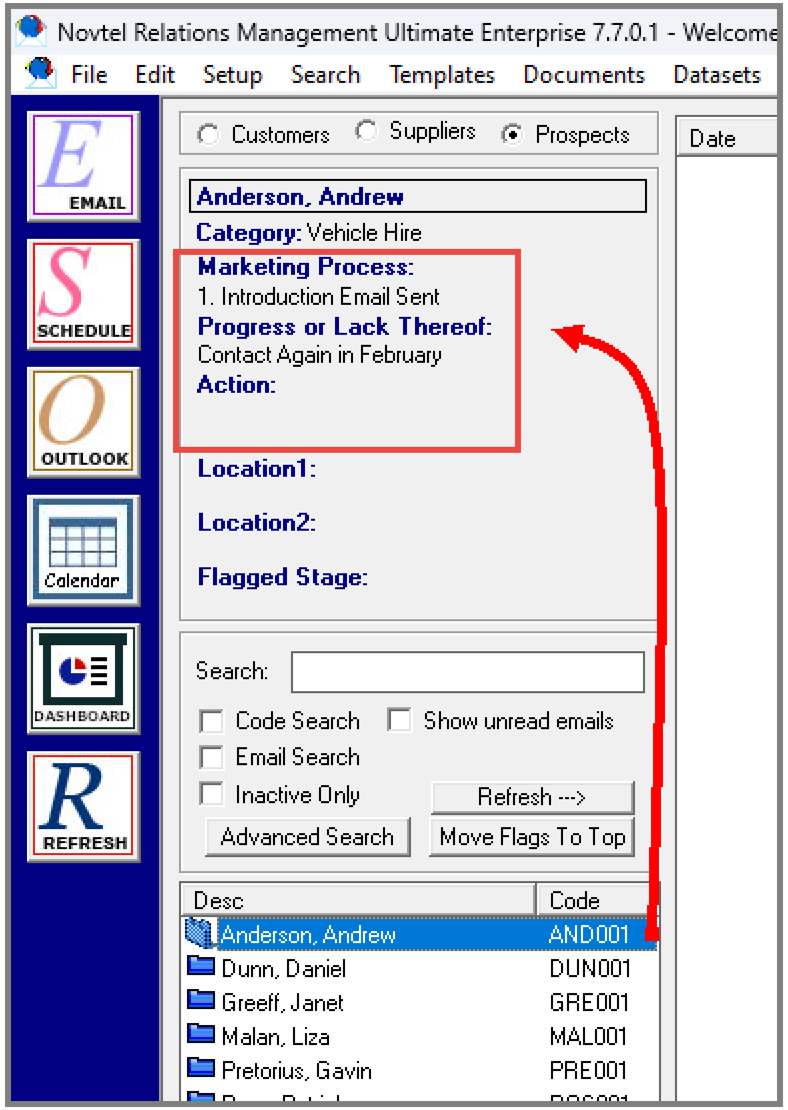
- In this case, the ‘Marketing Status’ is ‘Introduction Email Sent’;
- The ‘Progress or Lack Thereof’ is linked to the ‘Contact again in February’ sub-status;
- And under the ‘Action’ Main Status we will not select a specific sub-status since there is no action to be taken currently.





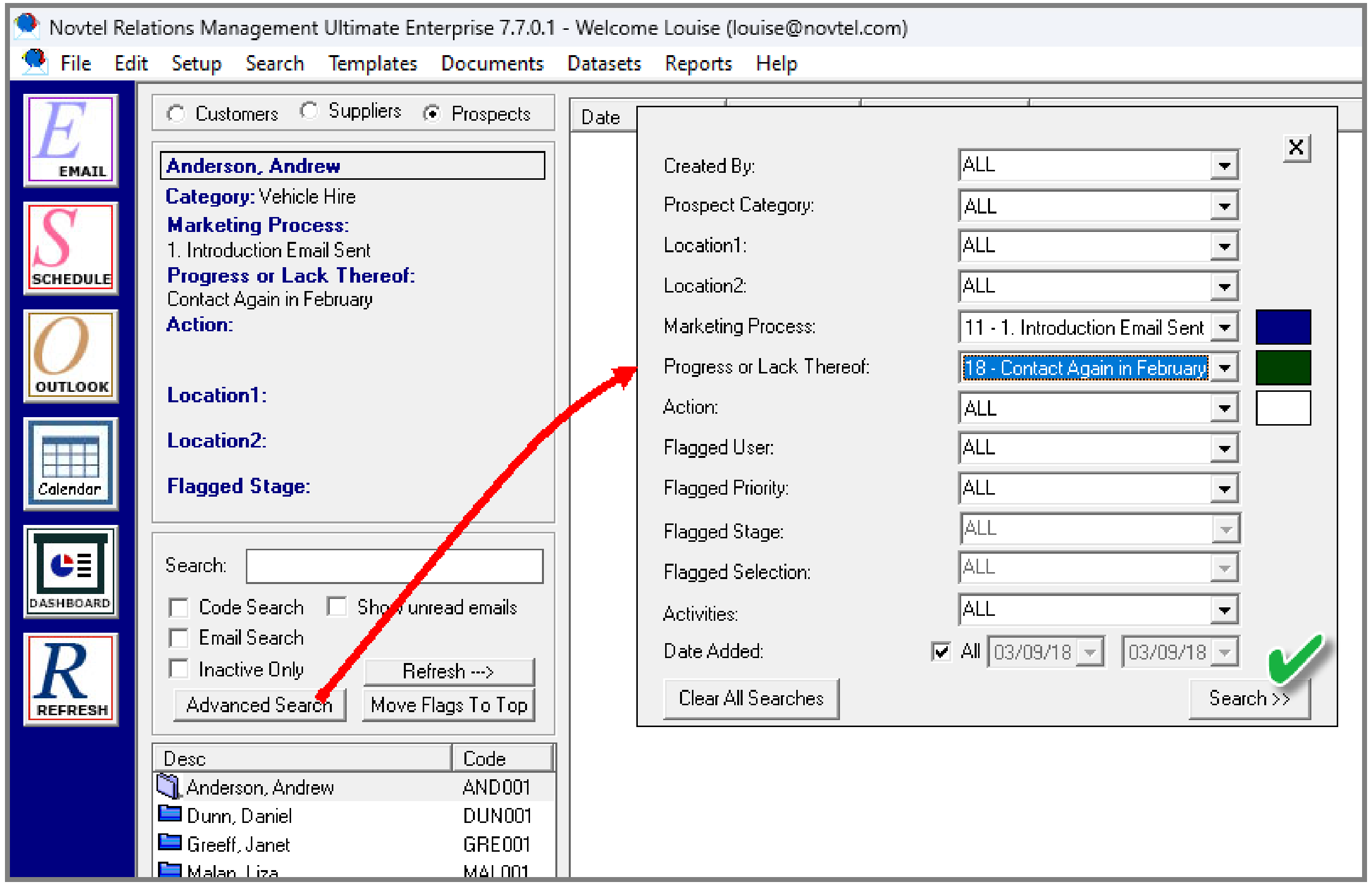
Clicking ‘Accept’ the statuses have been set successfully.

Statuses Explained



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.



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Relations Management

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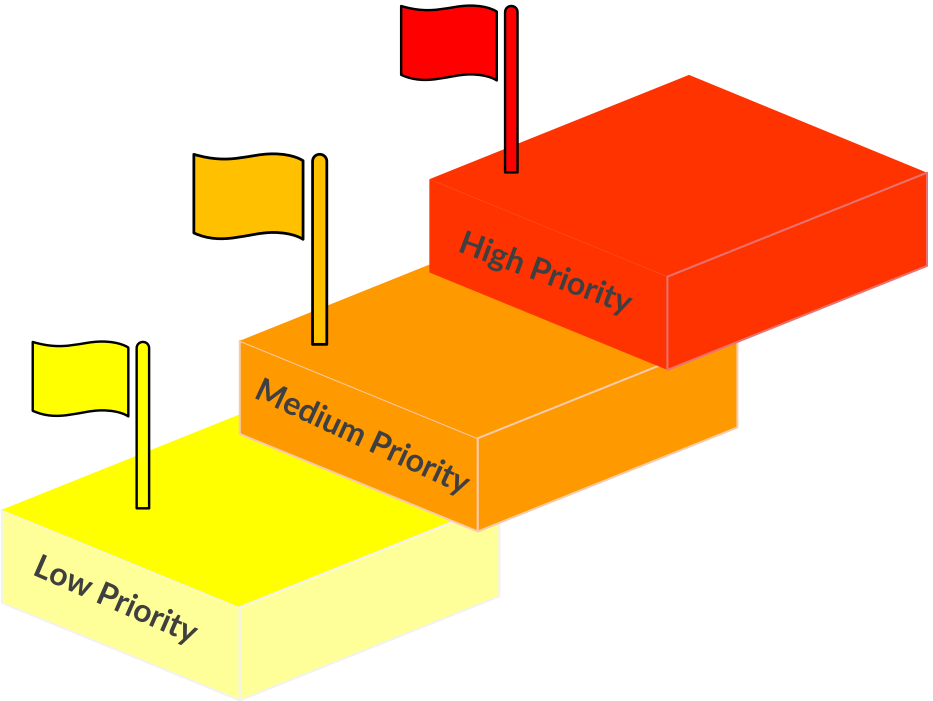
Flagging Accounts

Image by wahyu_t on Freepik

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.

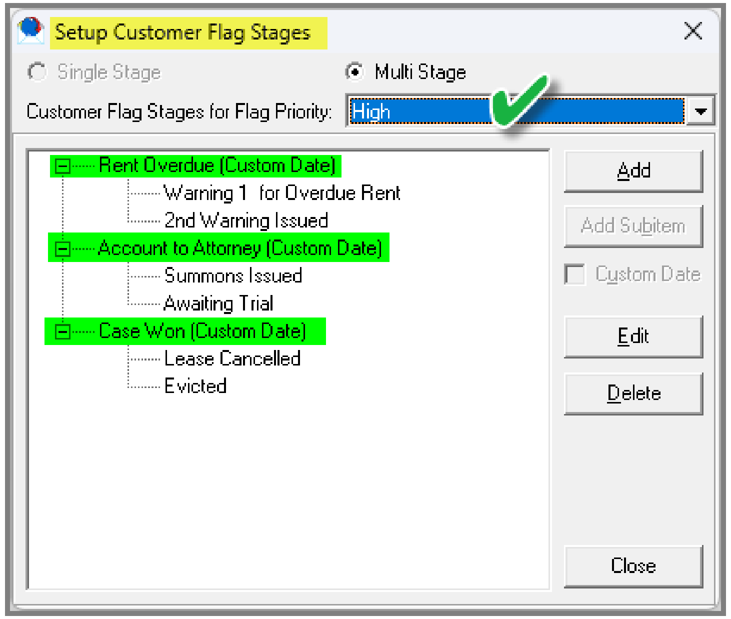


Flag stages must be pre-created in order for this functionality to be used correctly.

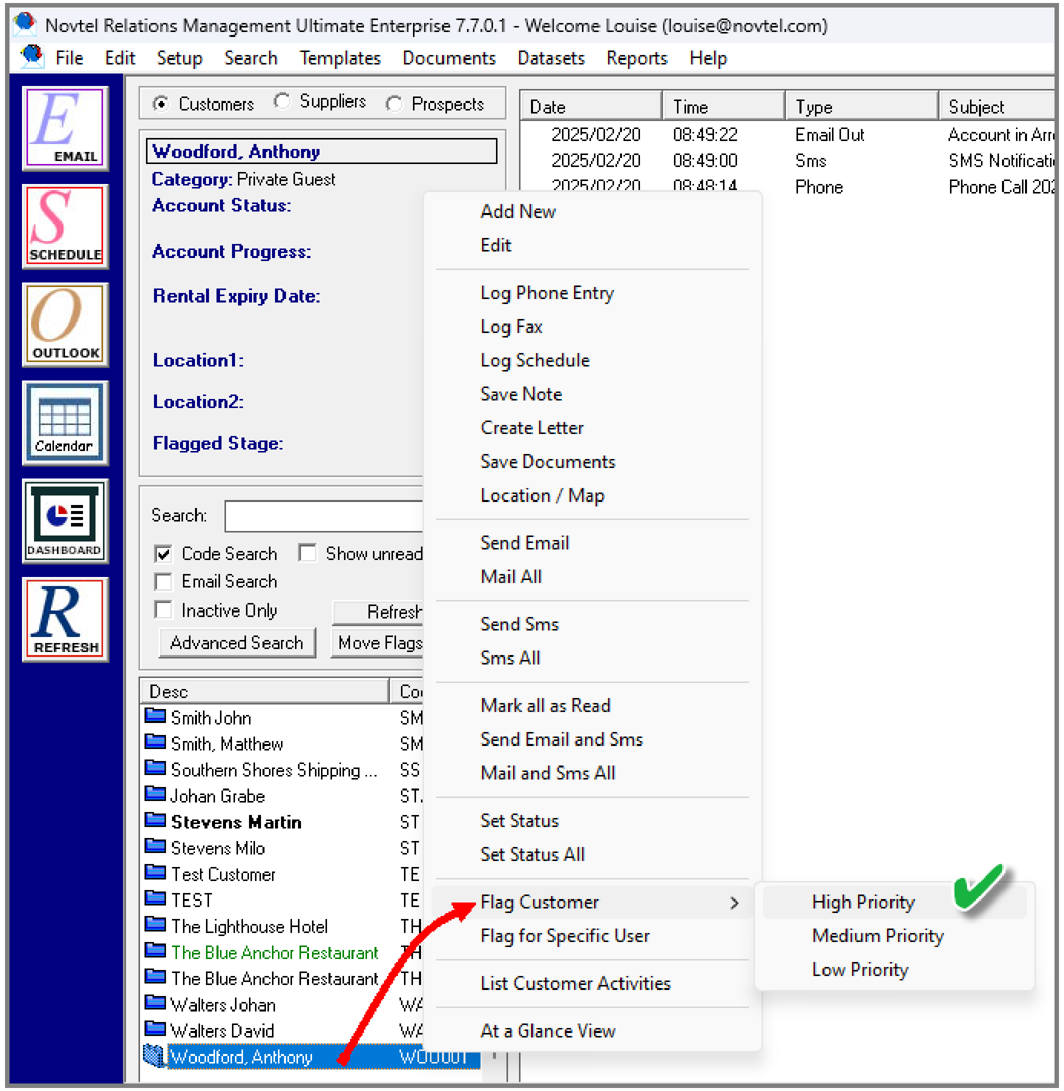
In our system, the Customer Flag stages for the High Priority Level have been set up as follow:

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.

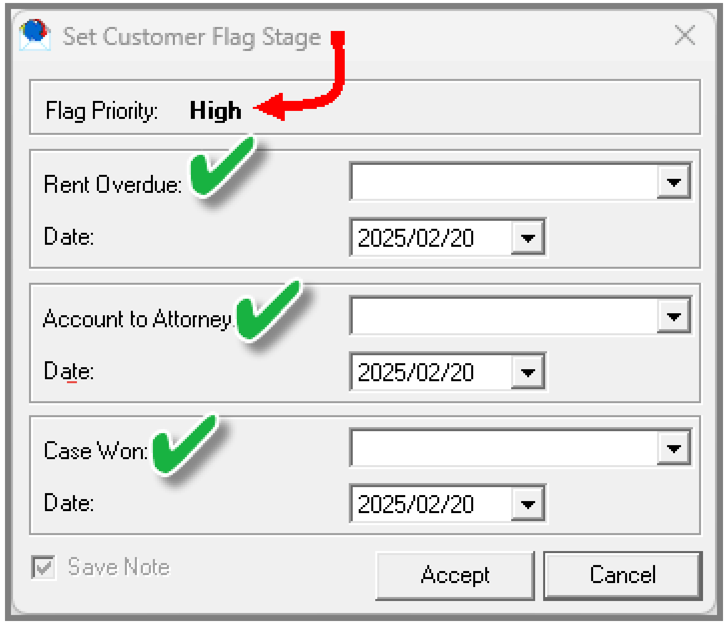


Flagging Accounts

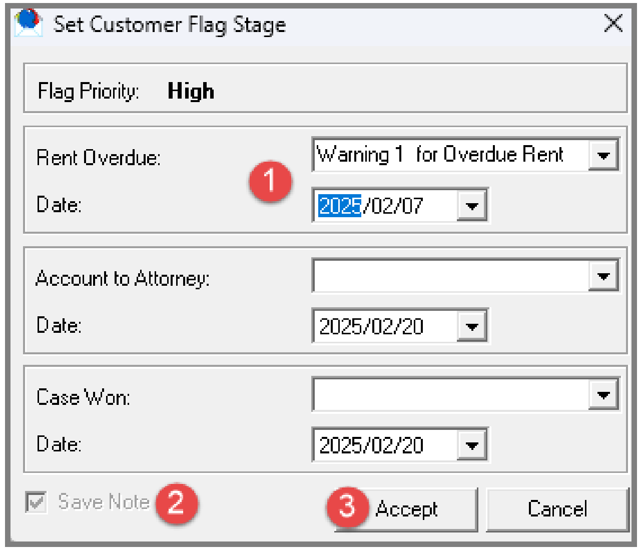


Right-clicking on an account, one of 3 flag priorities can be set.

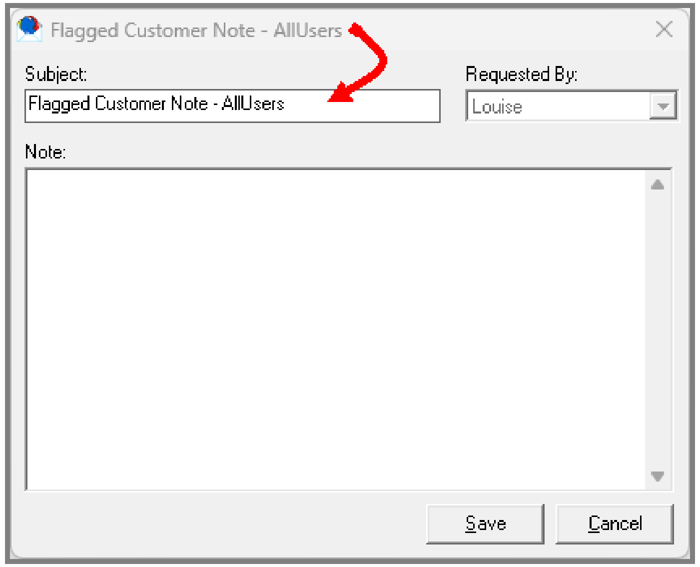
In this case, we have selected the ‘High Priority’ level, and therefore, the ‘Flag Priority’ corresponds at the top of the screen, and the Flag Stages created under this level, are displayed.

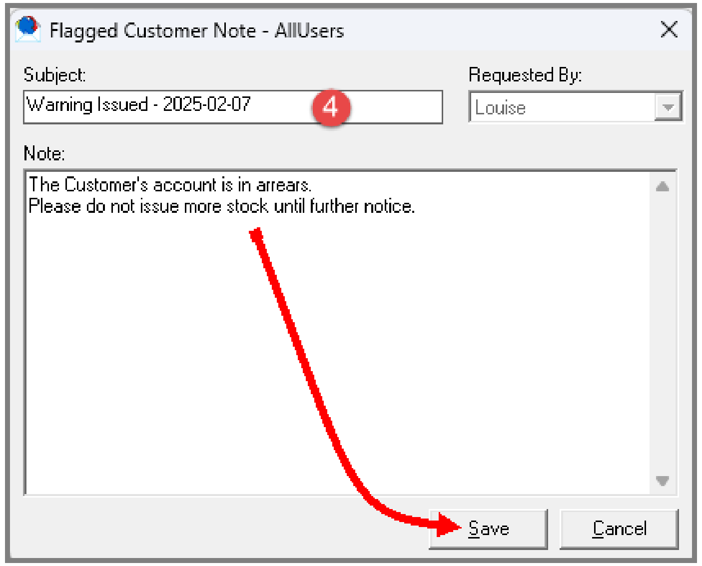


Flagging Accounts



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.





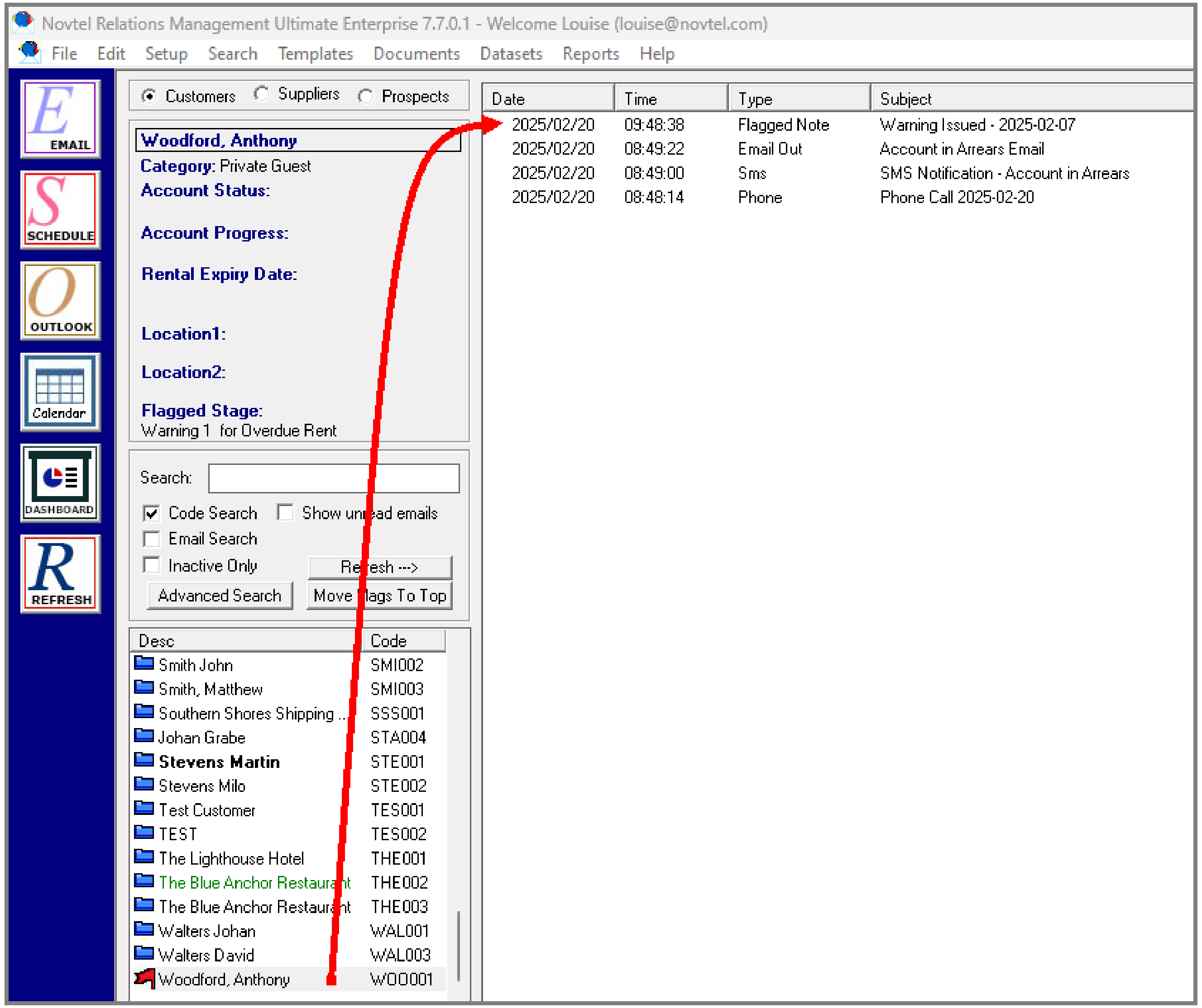
4. However: The subject can be altered to display the required information in the 'Subject' field on the Customer's communication screen.

   The note can now be captured and saved.

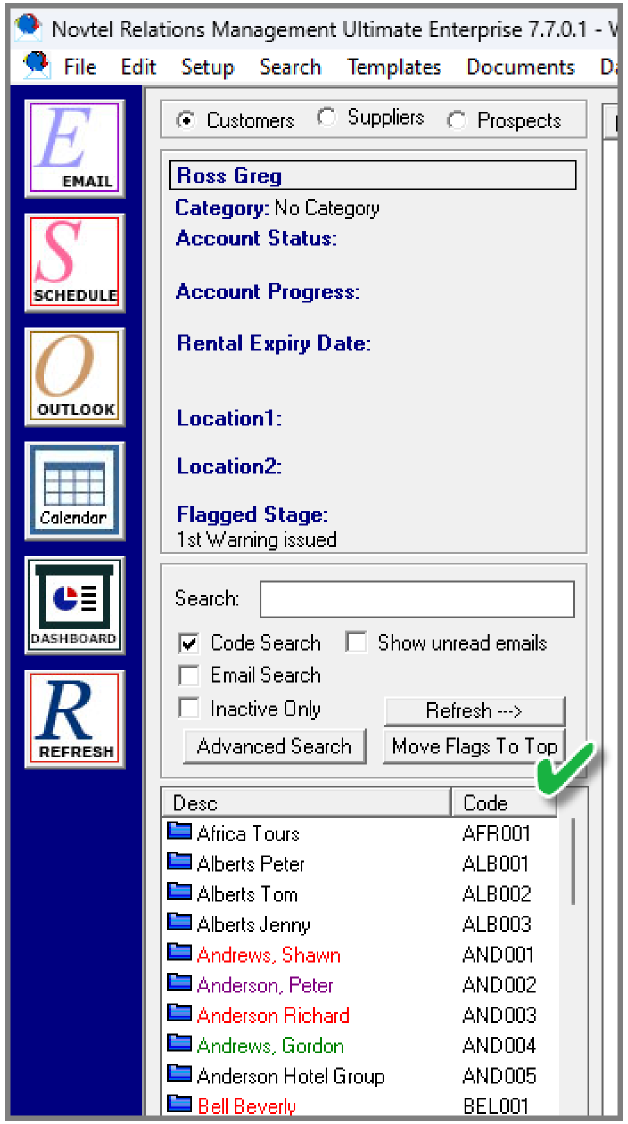
Flagging Accounts

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.



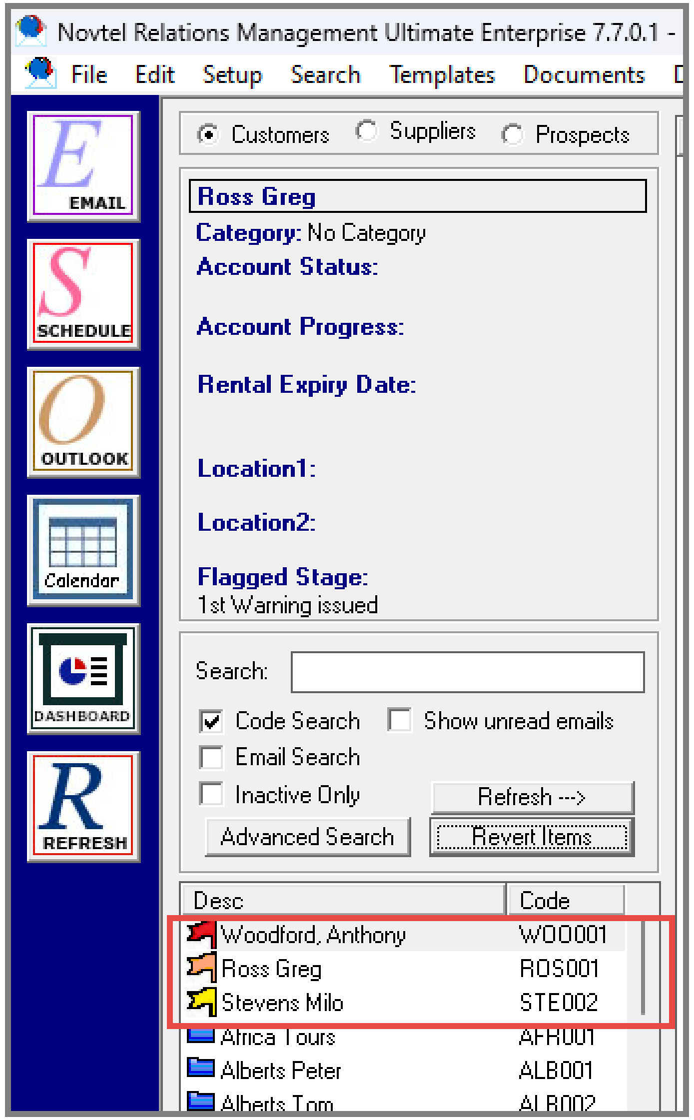
Flagging Accounts



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

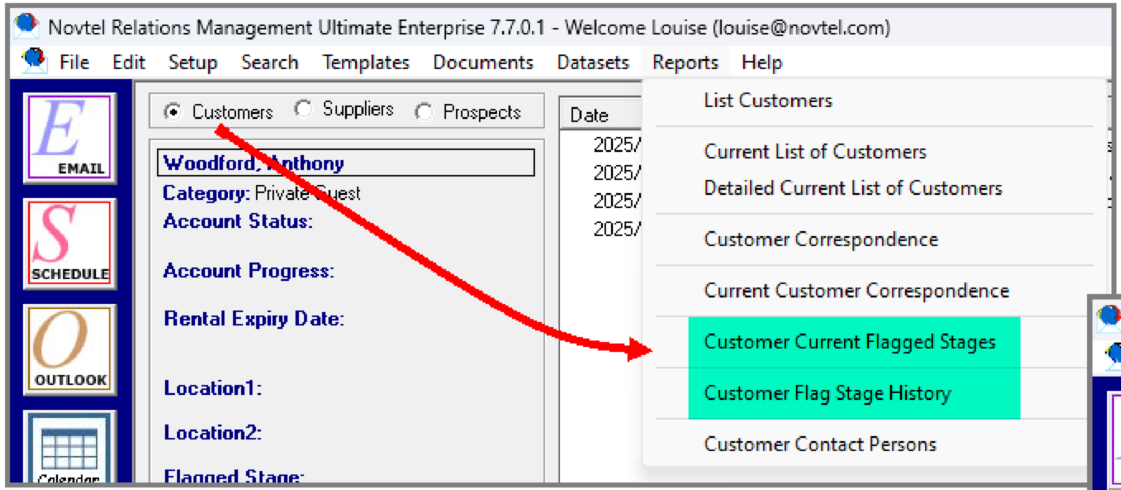
The Flagged accounts will be displayed at the top of the list.

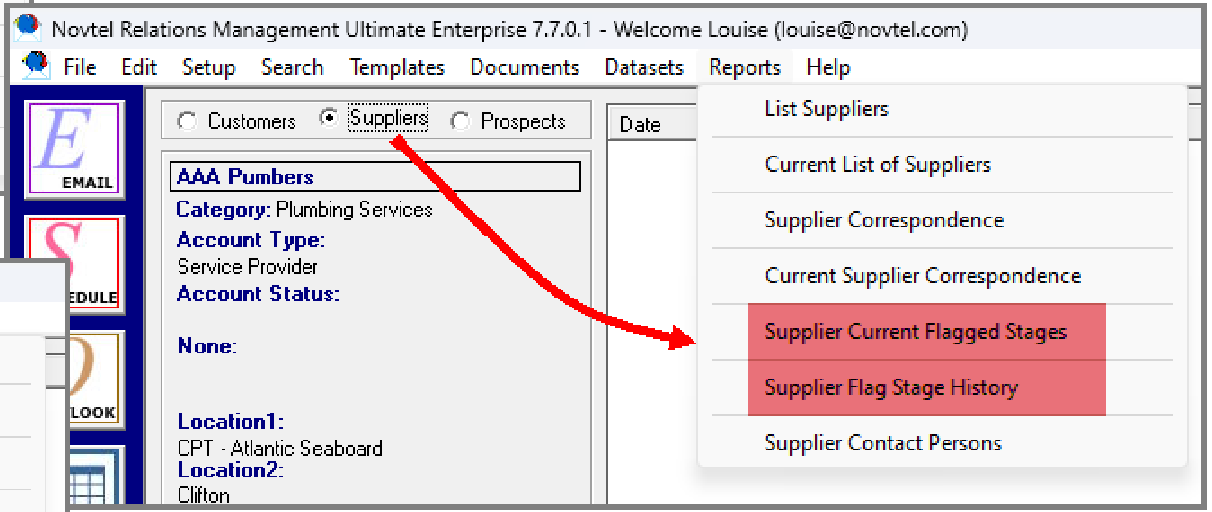
By clicking on the required Account, the Flagged Note can be accessed, and the necessary action taken.

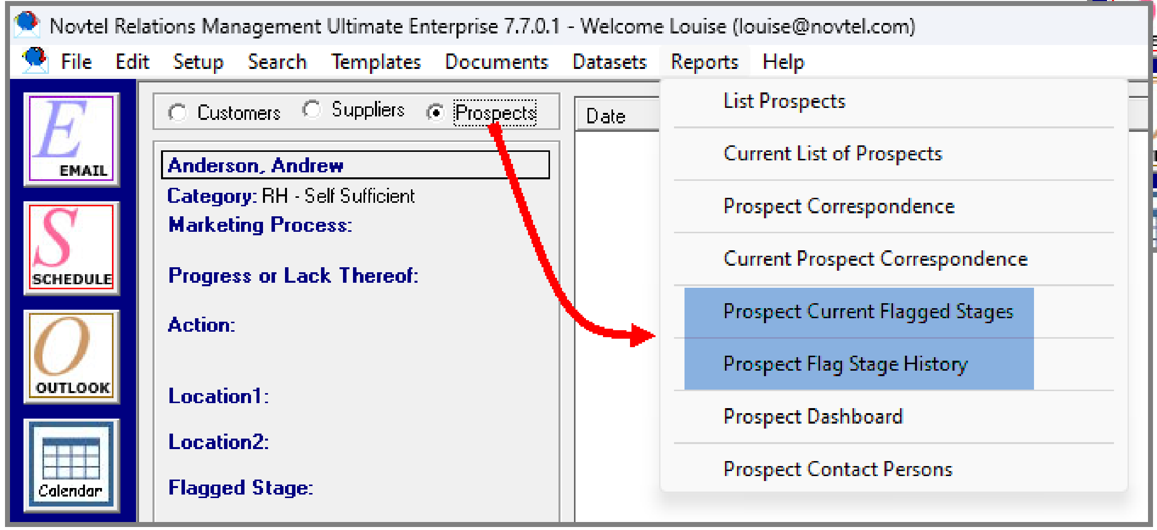


Flagging Accounts

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







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Relations Management

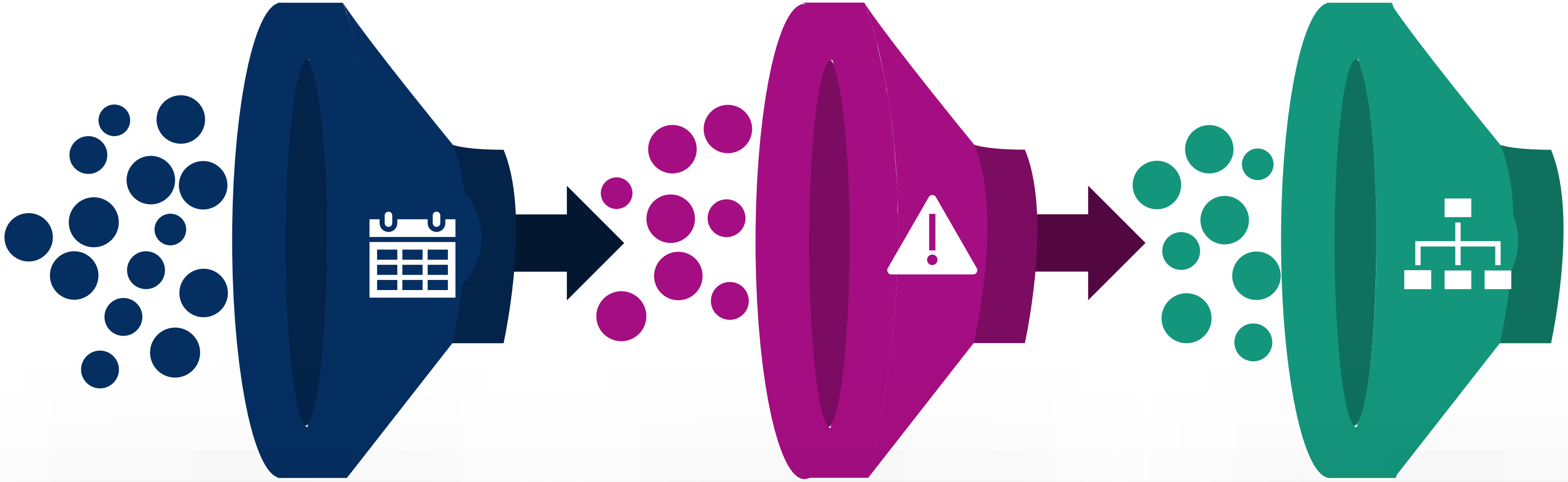
7

The Scheduling System

Image by wahyu_t on Freepik

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

Email

An email can immediately be sent to the applicable Novtel User's Microsoft Outlook account when a task is scheduled for them.

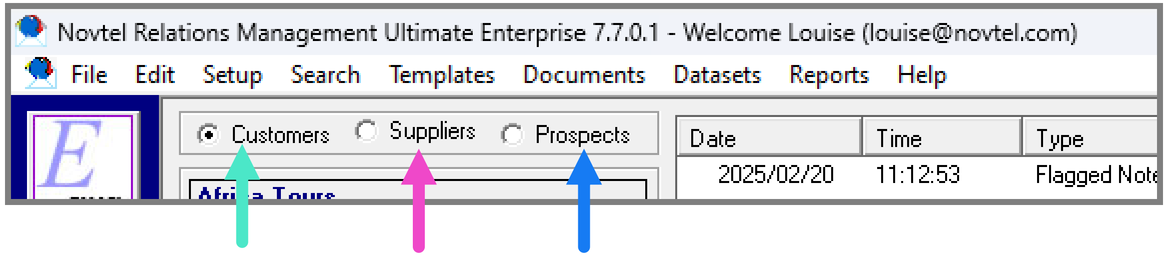
Reminder

A Microsoft Outlook reminder can be created and will pop up to remind the User of the action to be taken.

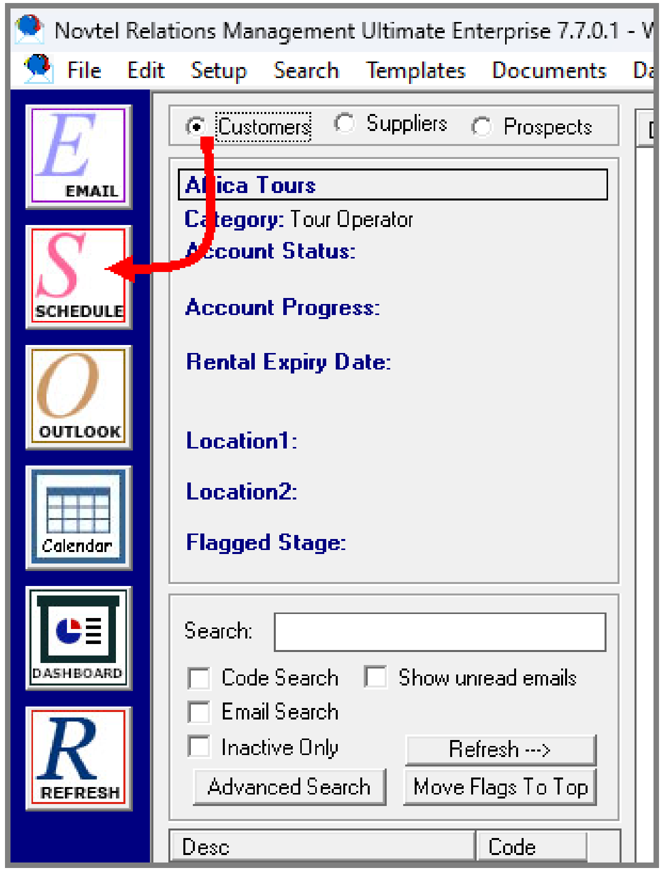
Calendar

The scheduled tasks will be visible in the User's Relations Calendar.

The Scheduling System

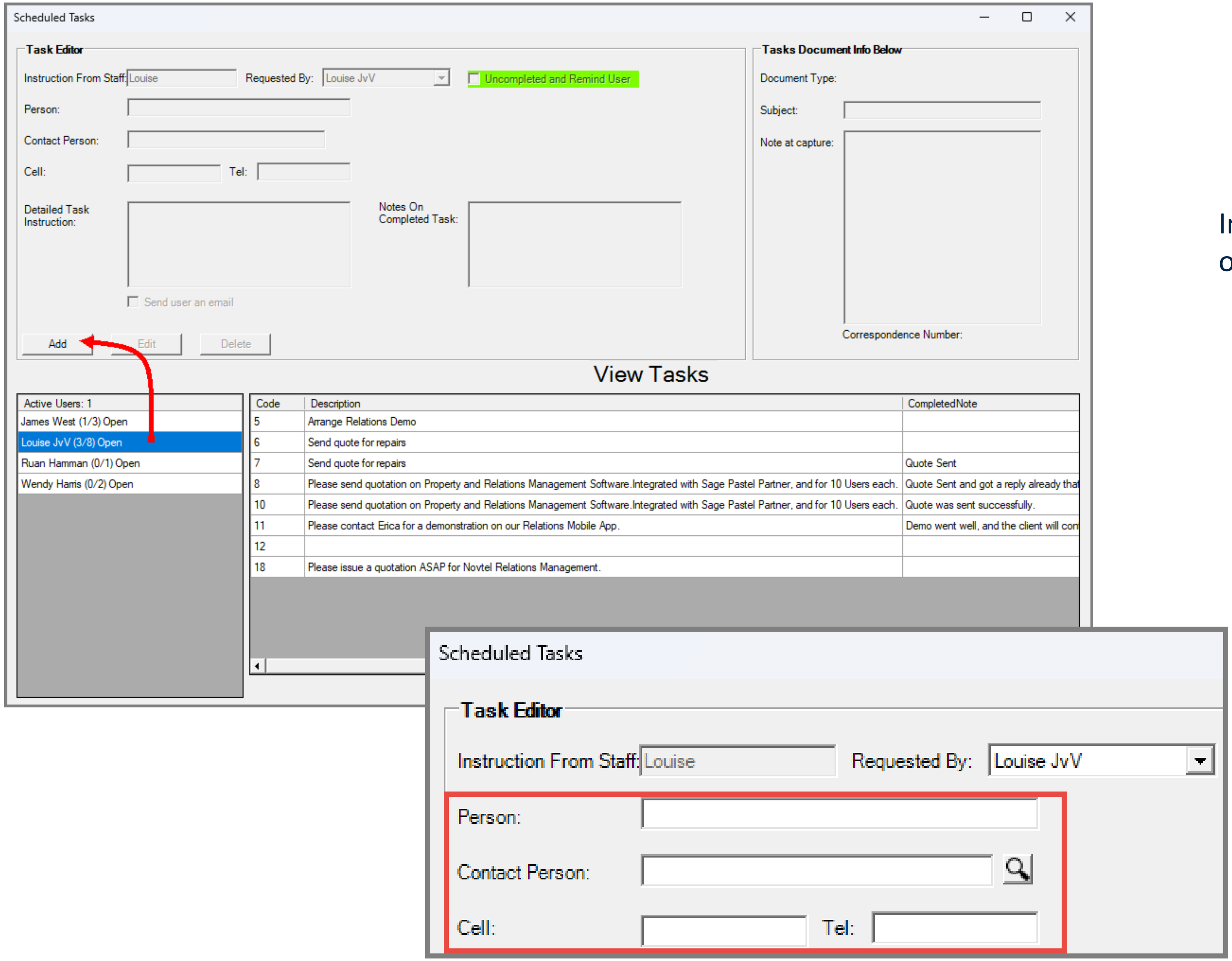


Tasks can be scheduled for Customers, Suppliers or Prospects respectively by first selecting the relevant option here.



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.

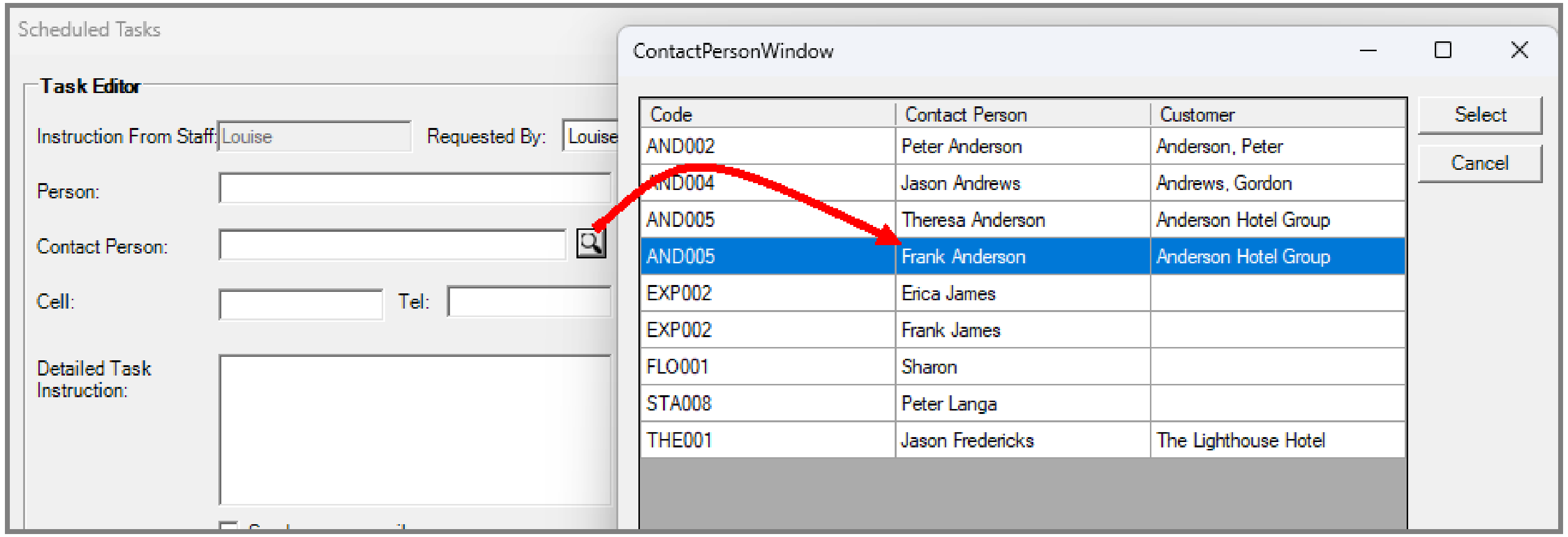
The Scheduling System



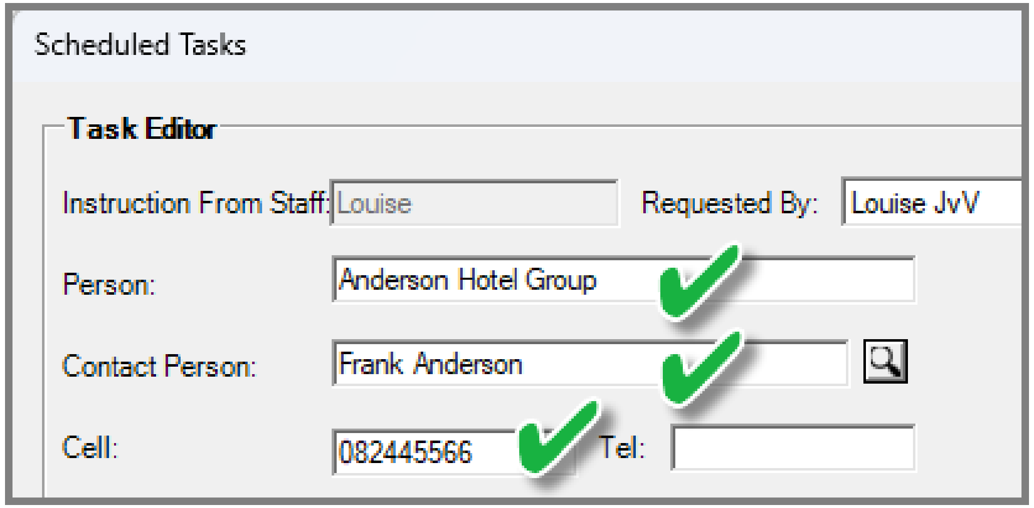
In the ‘Scheduled Tasks’ window, first click on the applicable User and click ‘Add’.

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

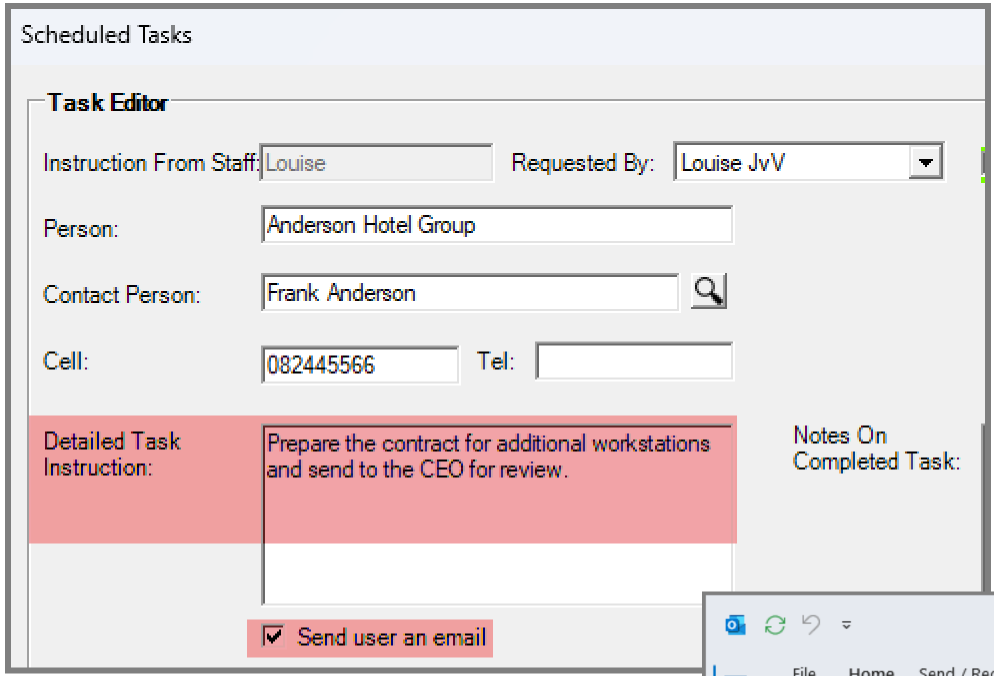
The Scheduling System



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 Scheduling System



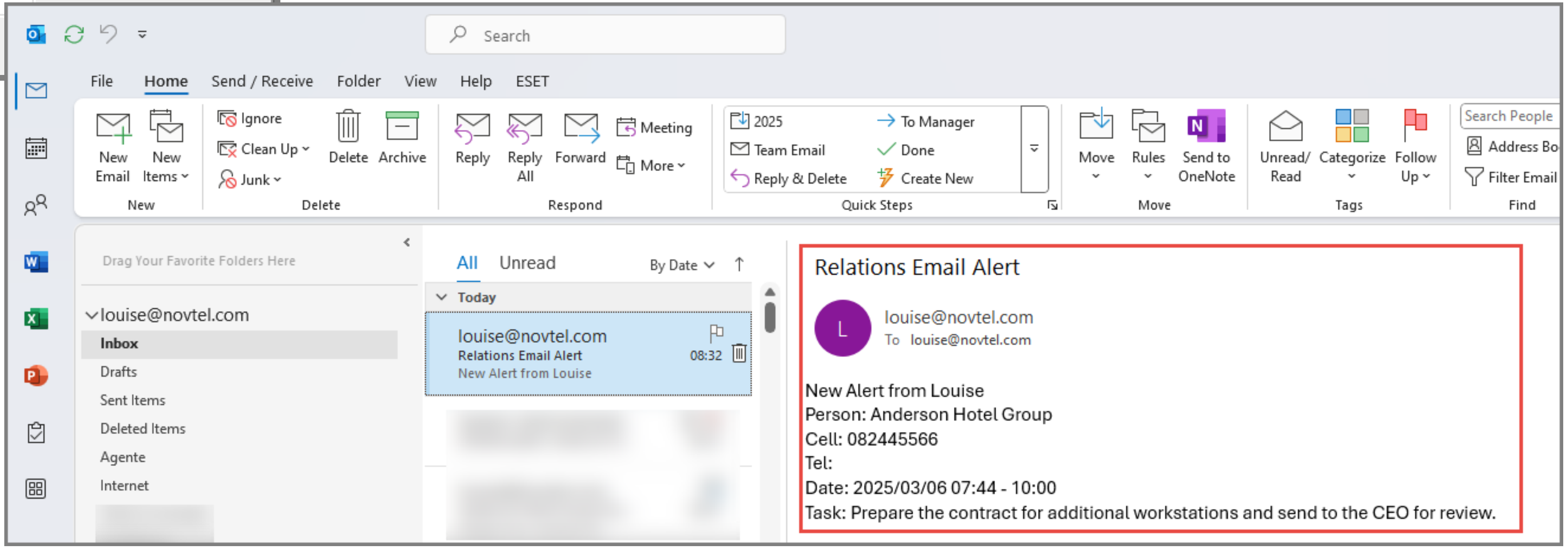
Instruction for task

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.

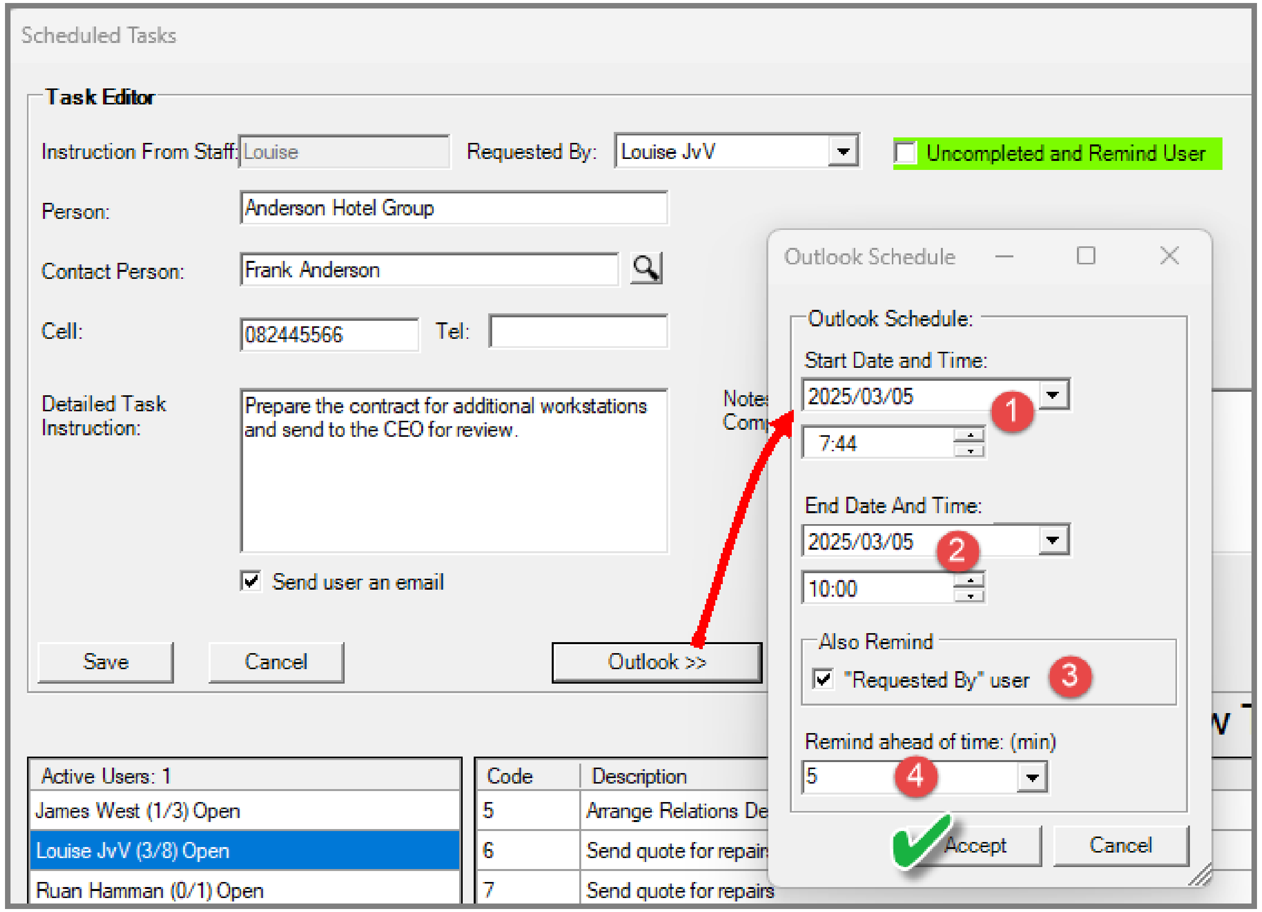
Send User an email

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



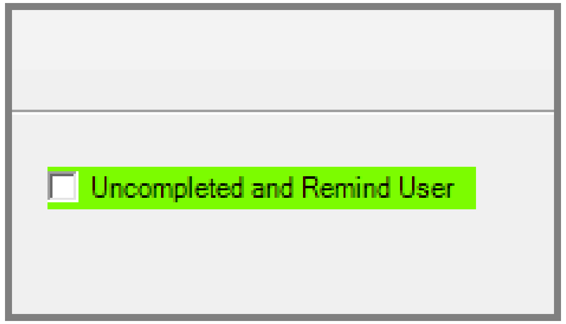
MS Outlook settings

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.

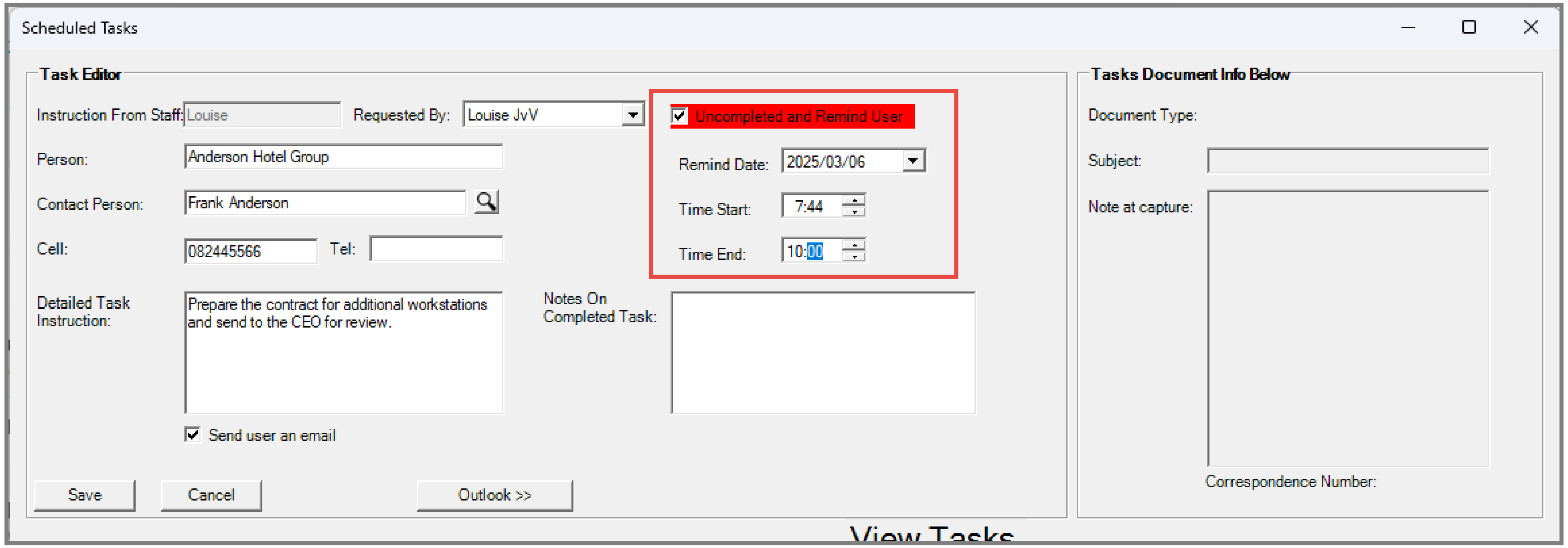
The Scheduling System



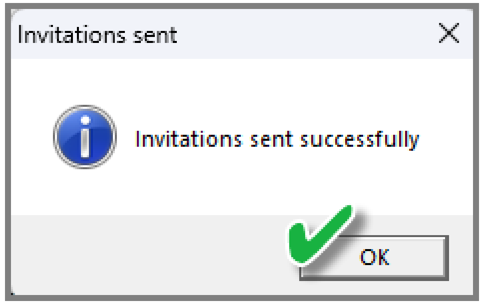
By default, the ‘Uncompleted and Remind User’ option is deselected and is displayed in a green background colour.

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

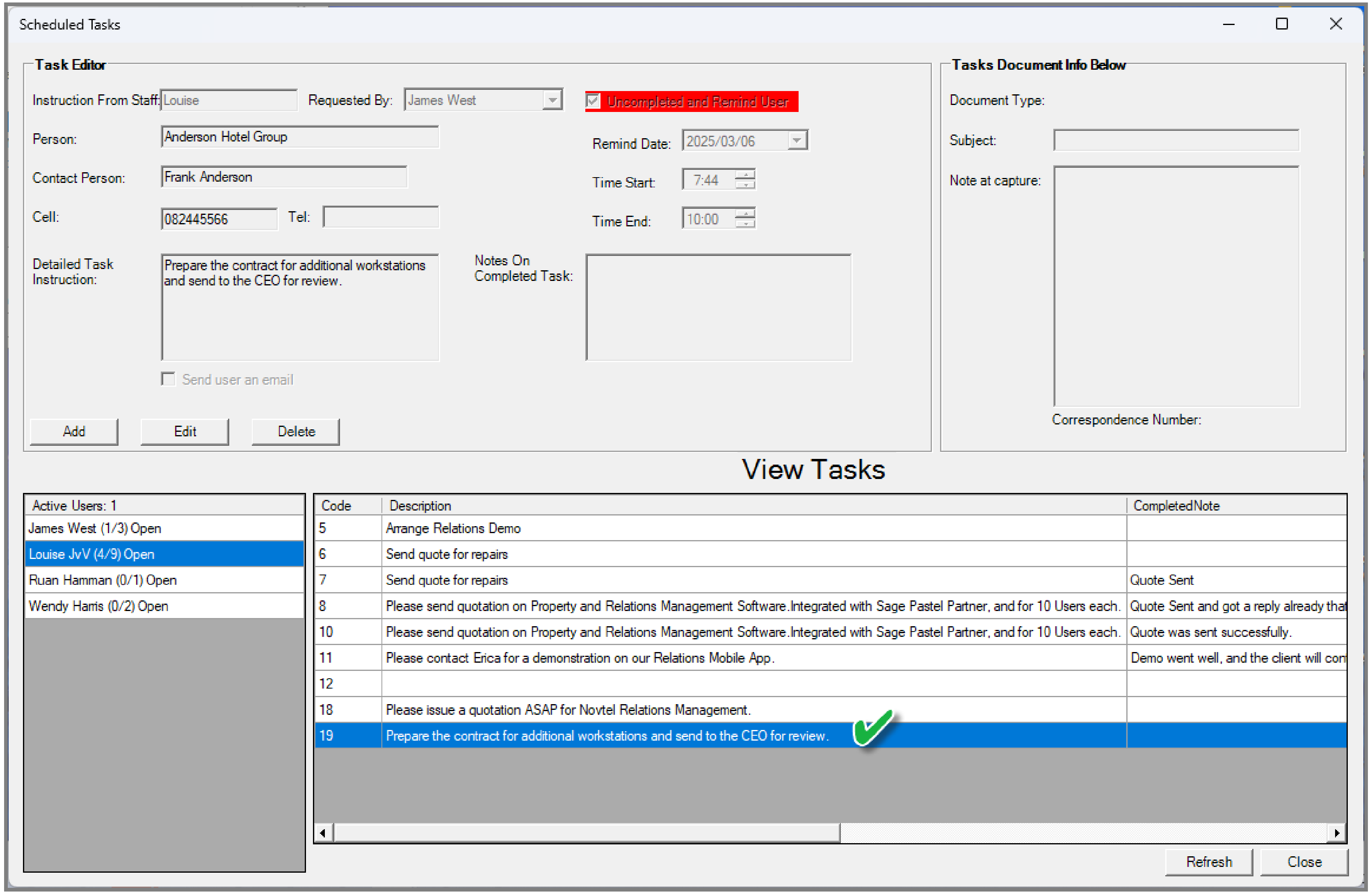
The ‘Reminder’ date, as well as the reminder start, and end times can now be set.



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



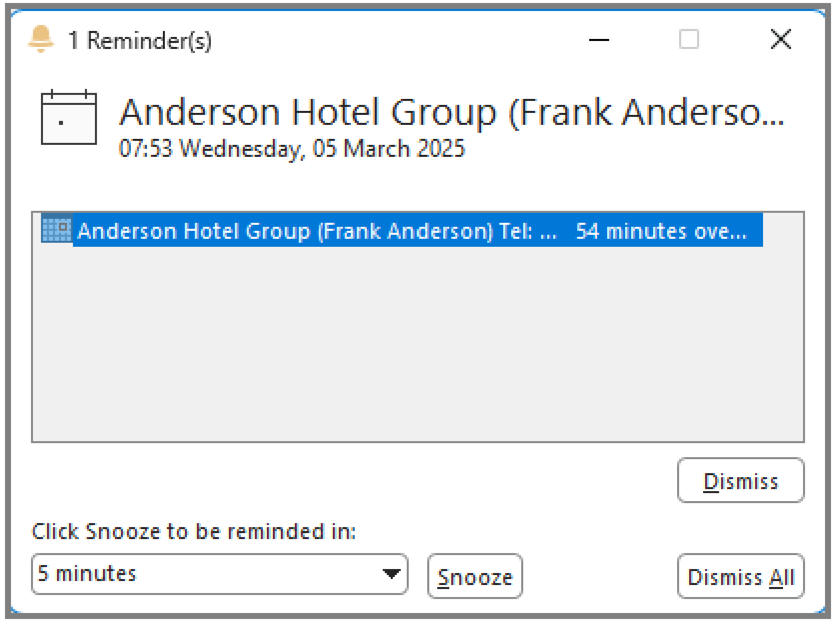
The Scheduling System

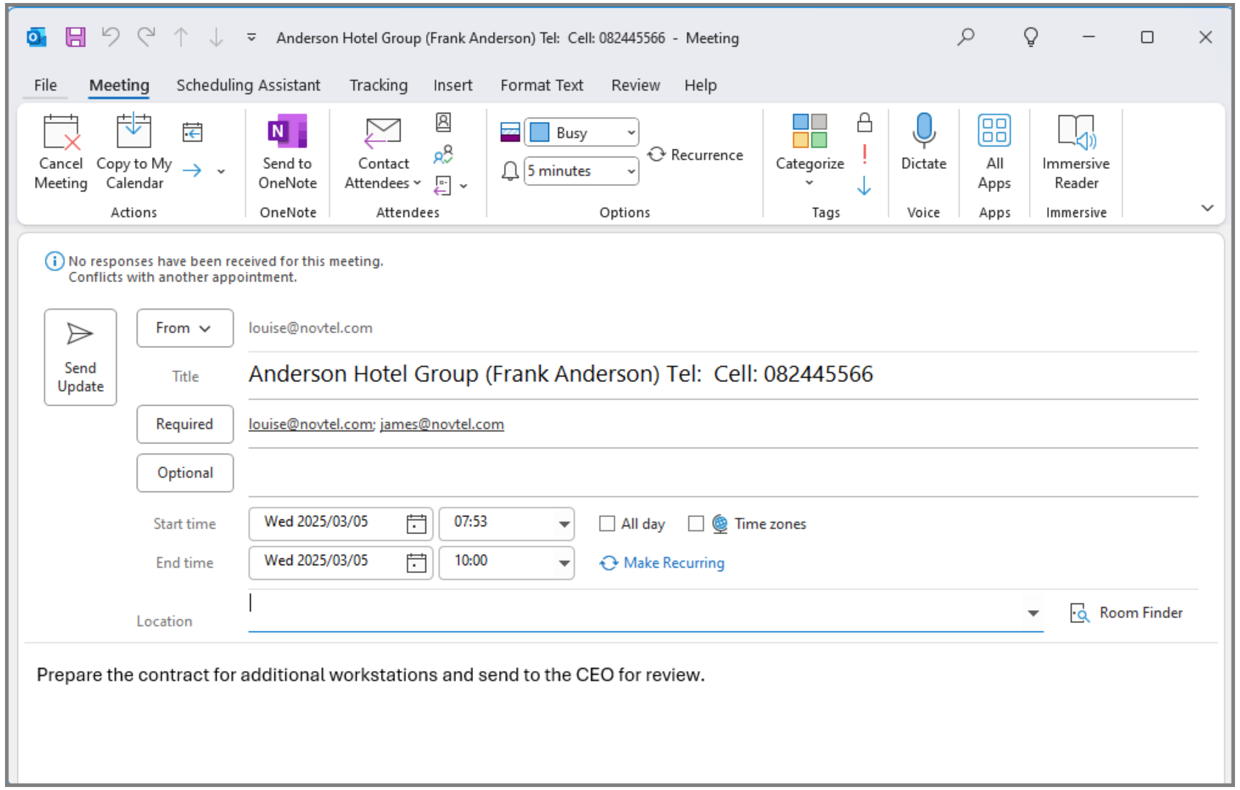


The task is now displayed under the User's List of Tasks.

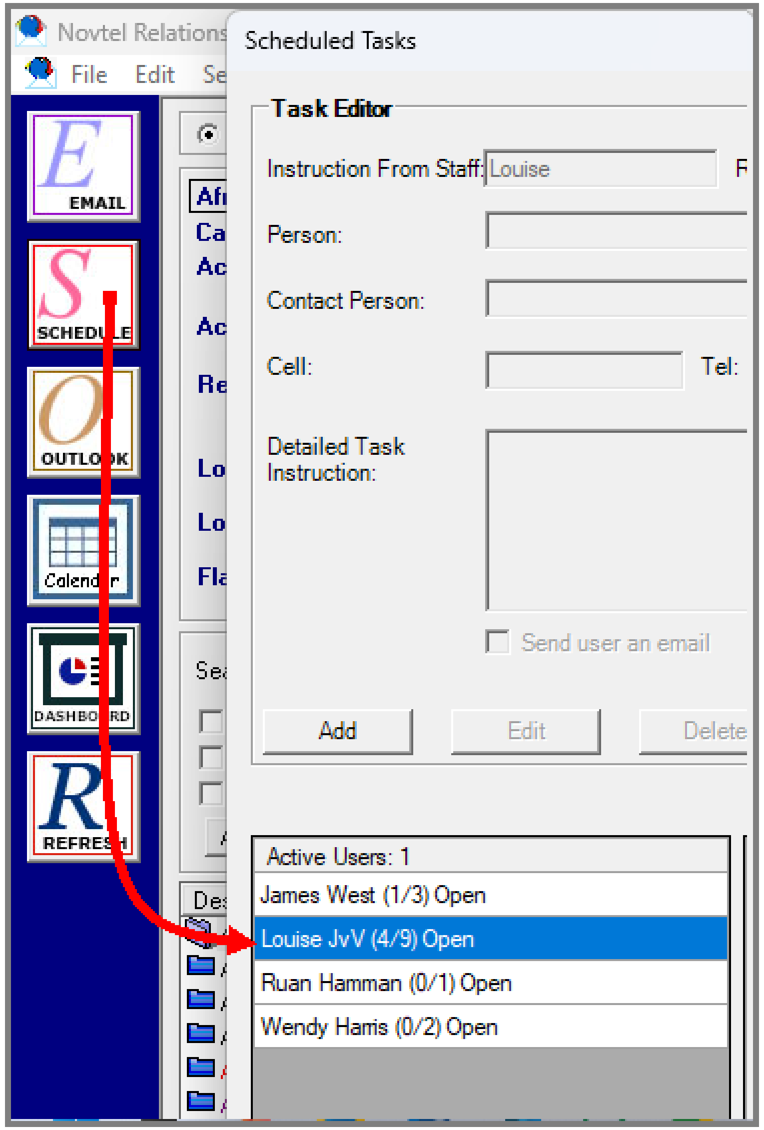
The Scheduling System

The Outlook reminder will is displayed as follows:



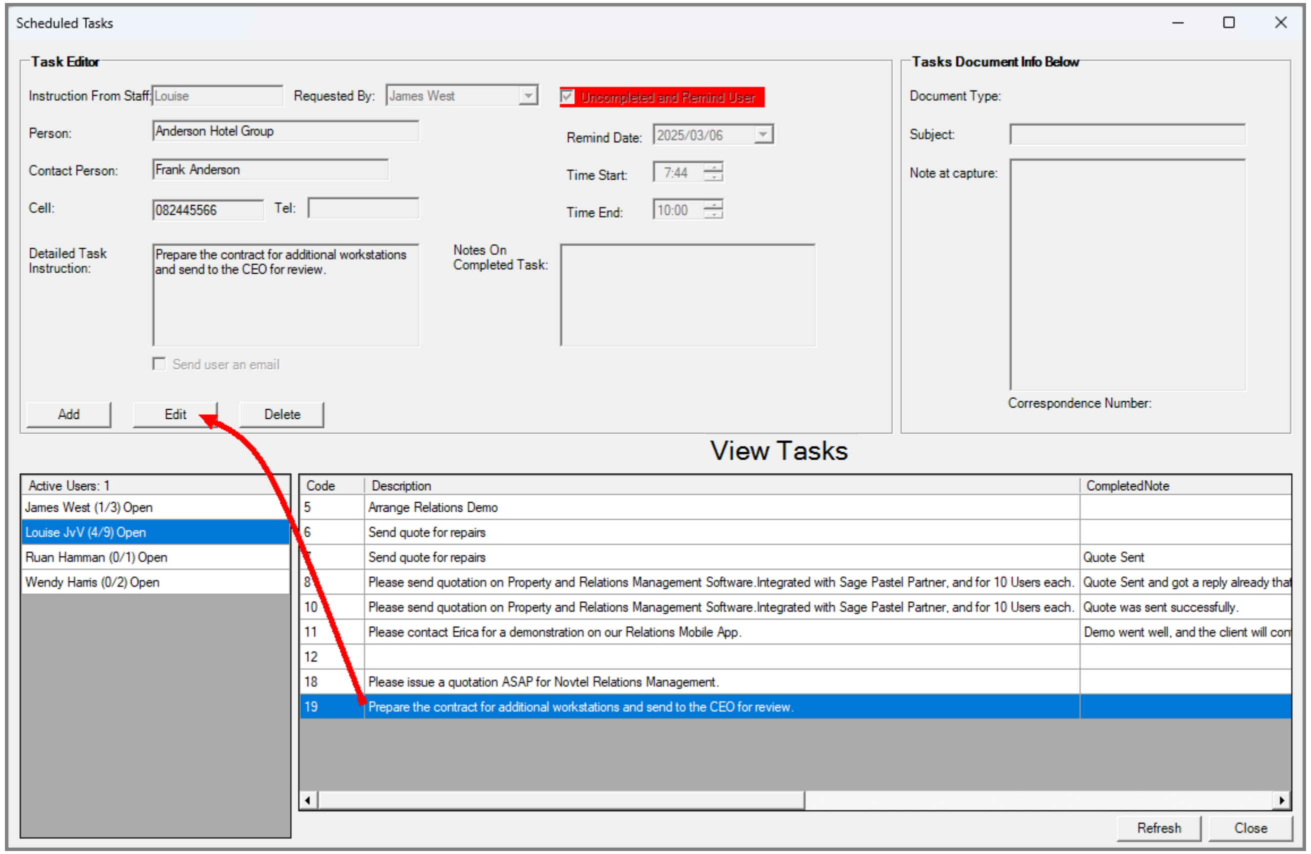


The Scheduling System

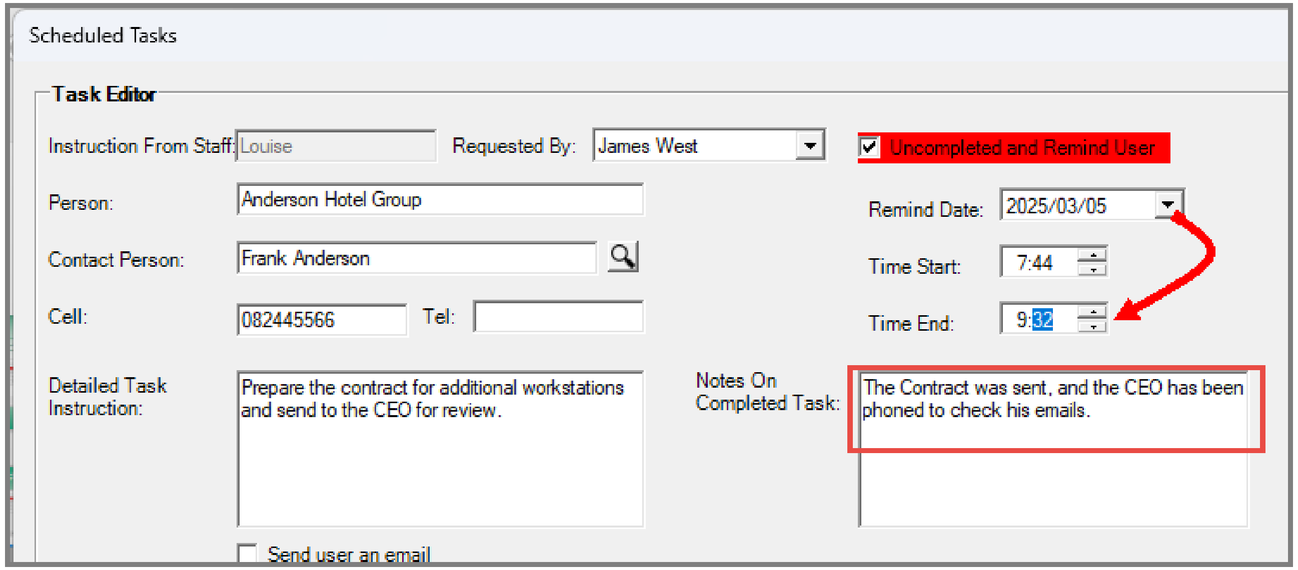


When the task is completed by the User, they will proceed to click on the ‘Schedule’ icon and select his or her Username to display the tasks assigned to them.

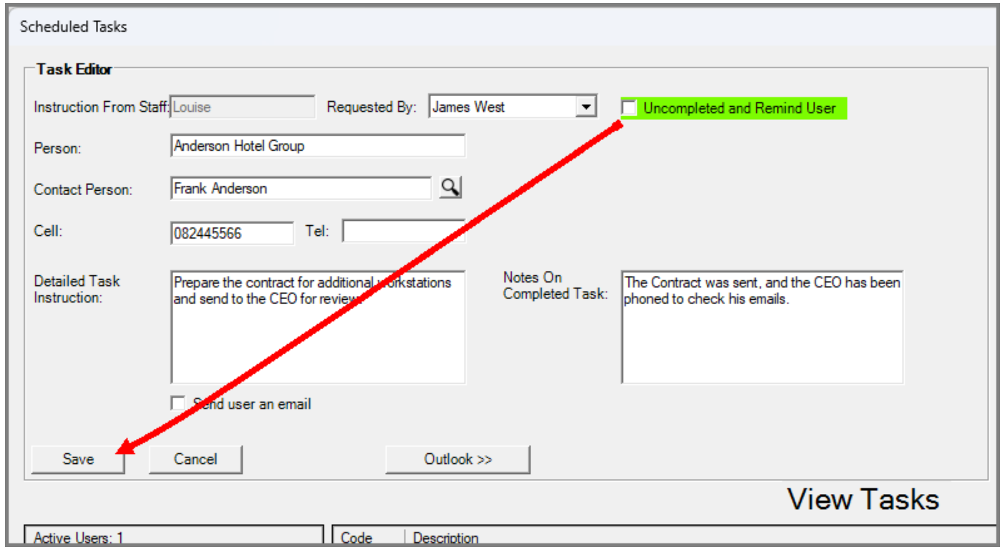
Clicking on the specific task to be marked as completed, the details will be displayed as captured, and the ‘Edit’ button is to be selected.



The Scheduling System

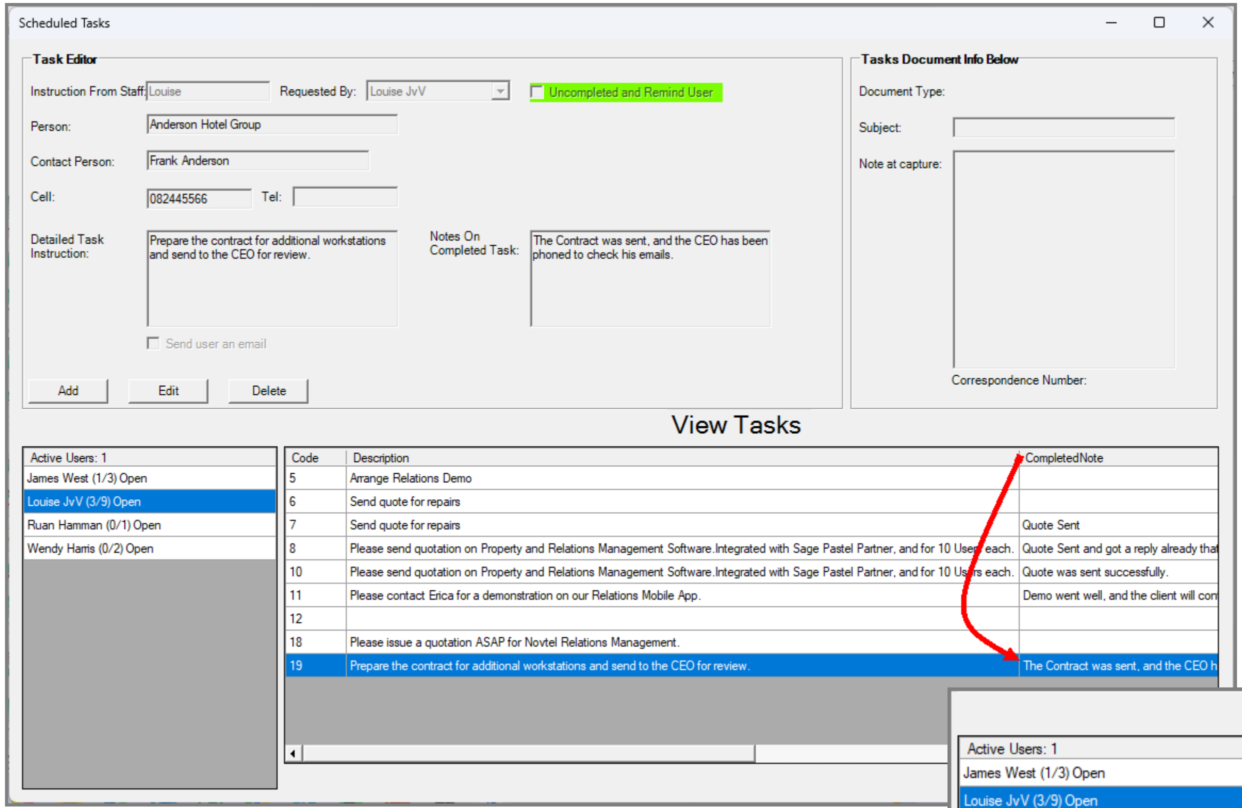


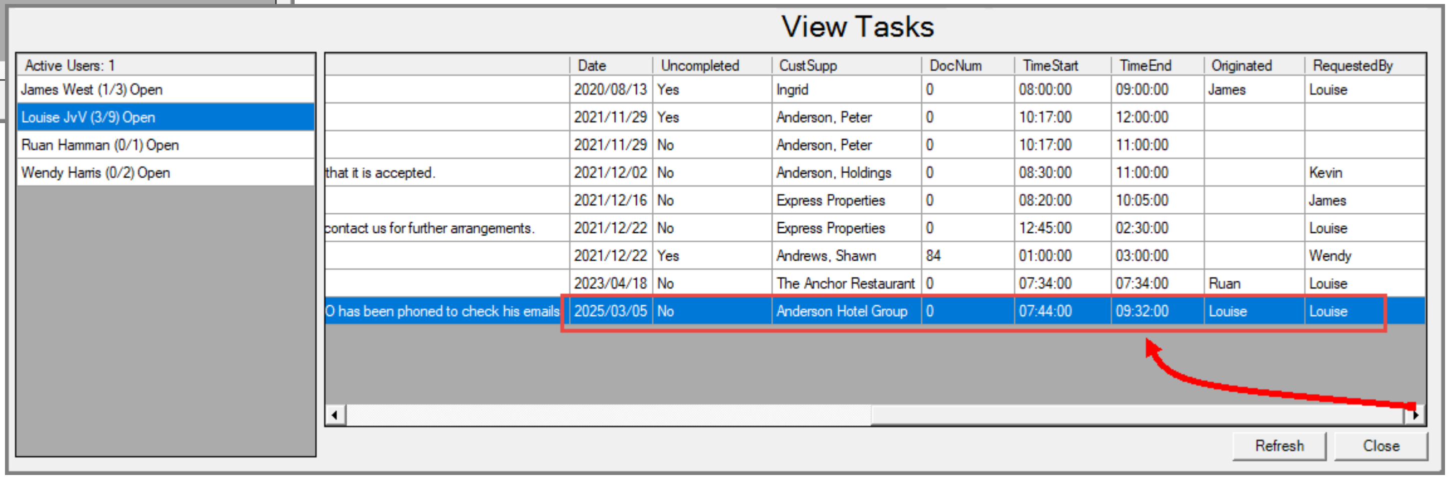
We have changed the end time of the task to the exact day and time the task was completed, and entered the details of how the task was completed.



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

The Scheduling System

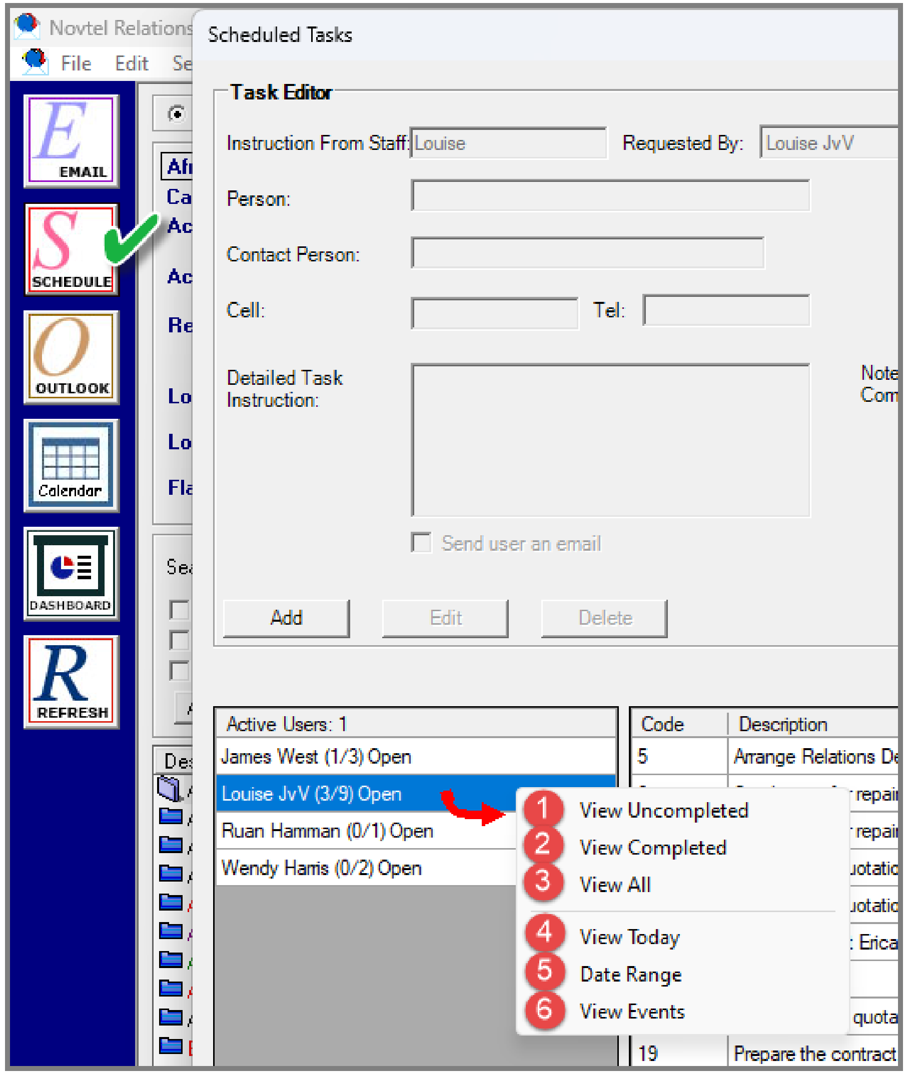




The captured 'Note on Completed Task' is now displayed in the 'CompletedNote' column for this task.

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

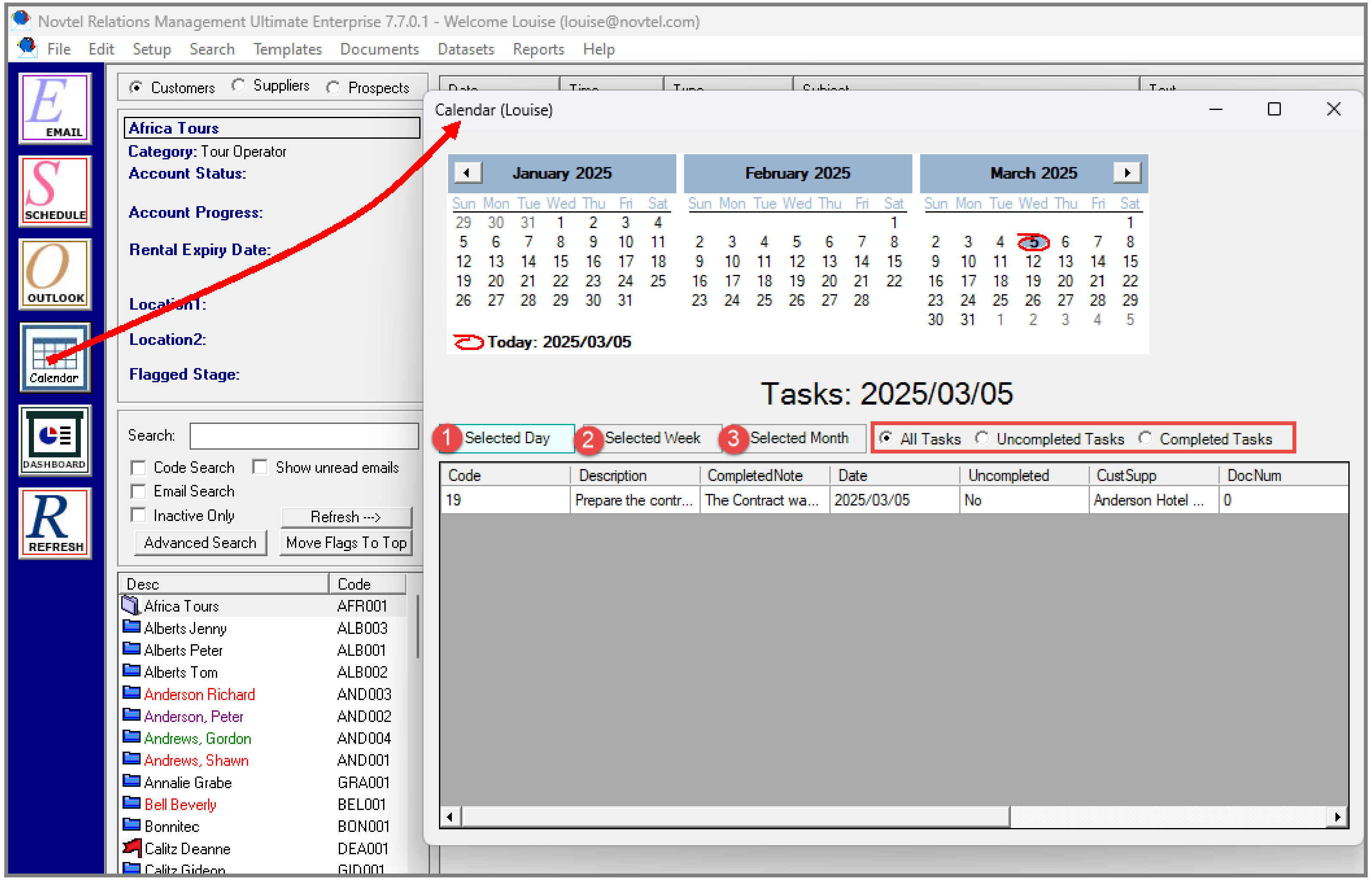
The Scheduling System



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



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

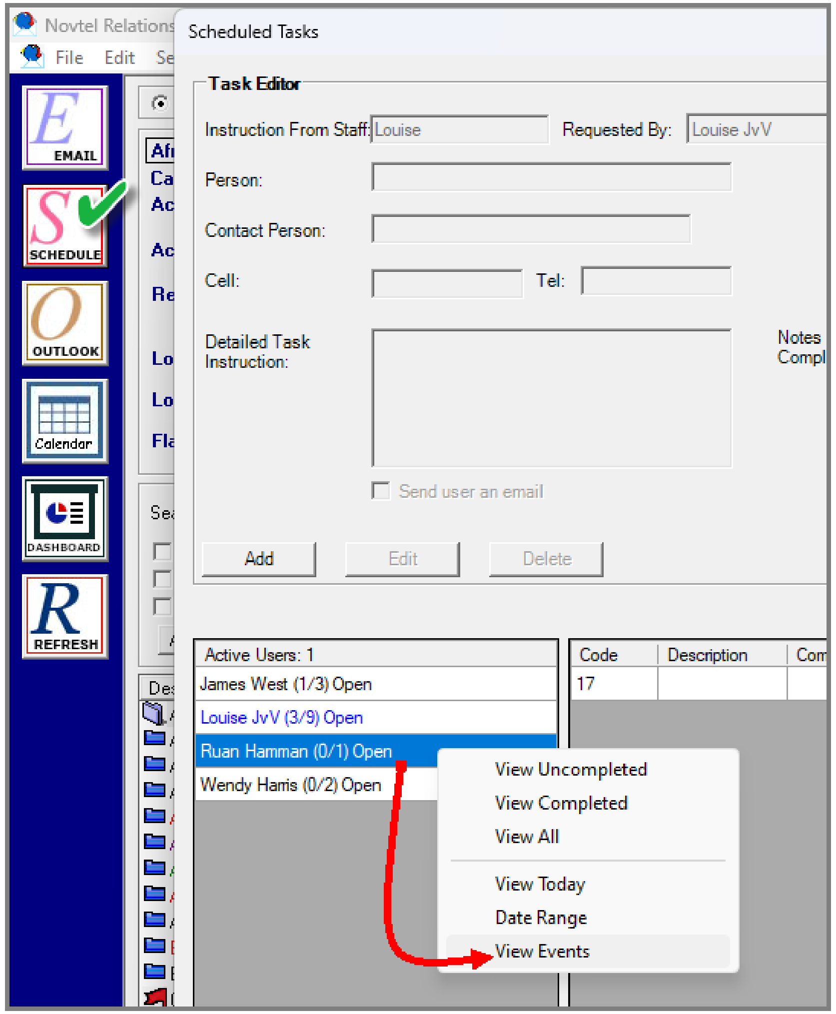
This User will be able to view his or her own tasks here for a:

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

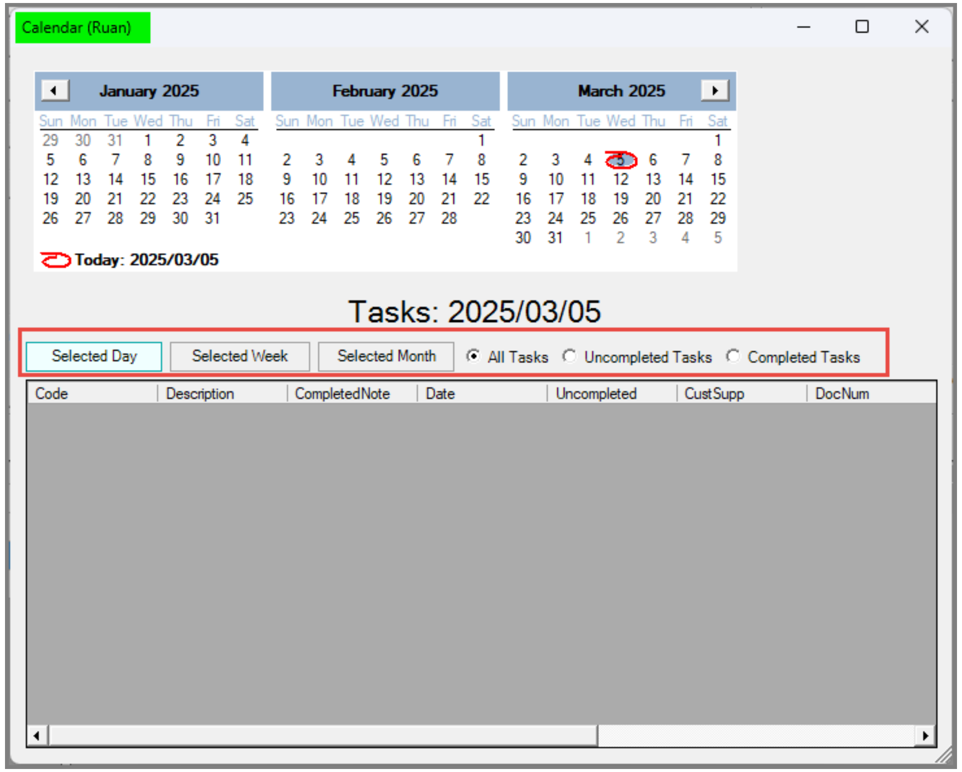
The User can also view:

- ✓ 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®

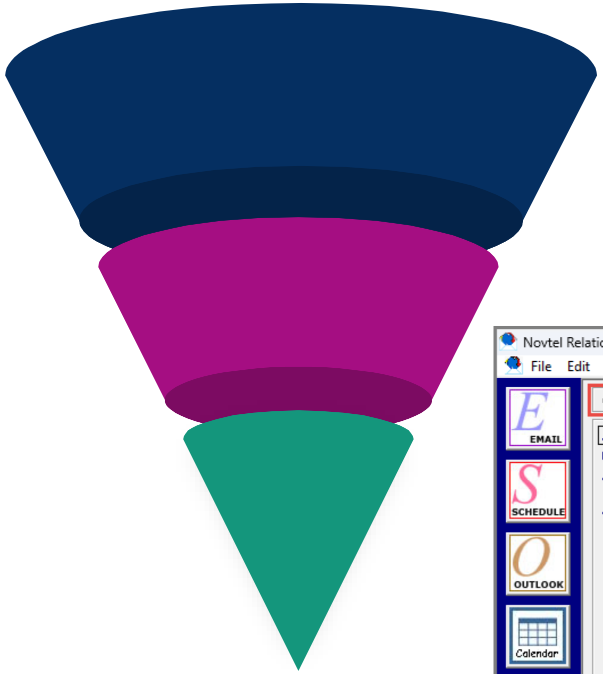
Relations Management

8

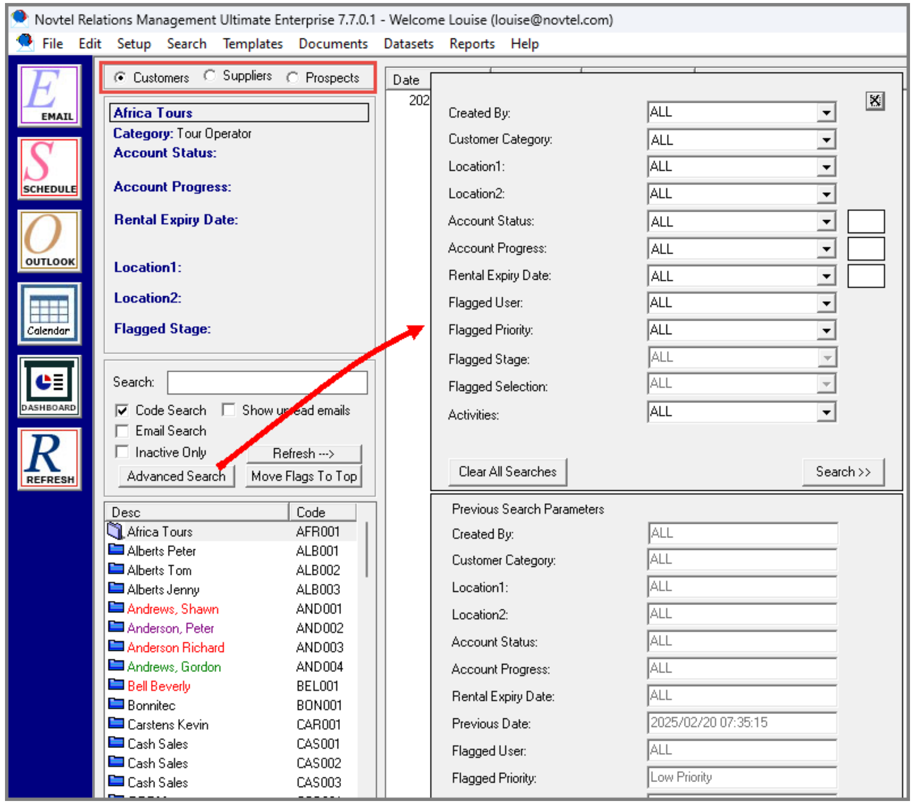
Search and Filtering Options

Image by wahyu_t on Freepik

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.



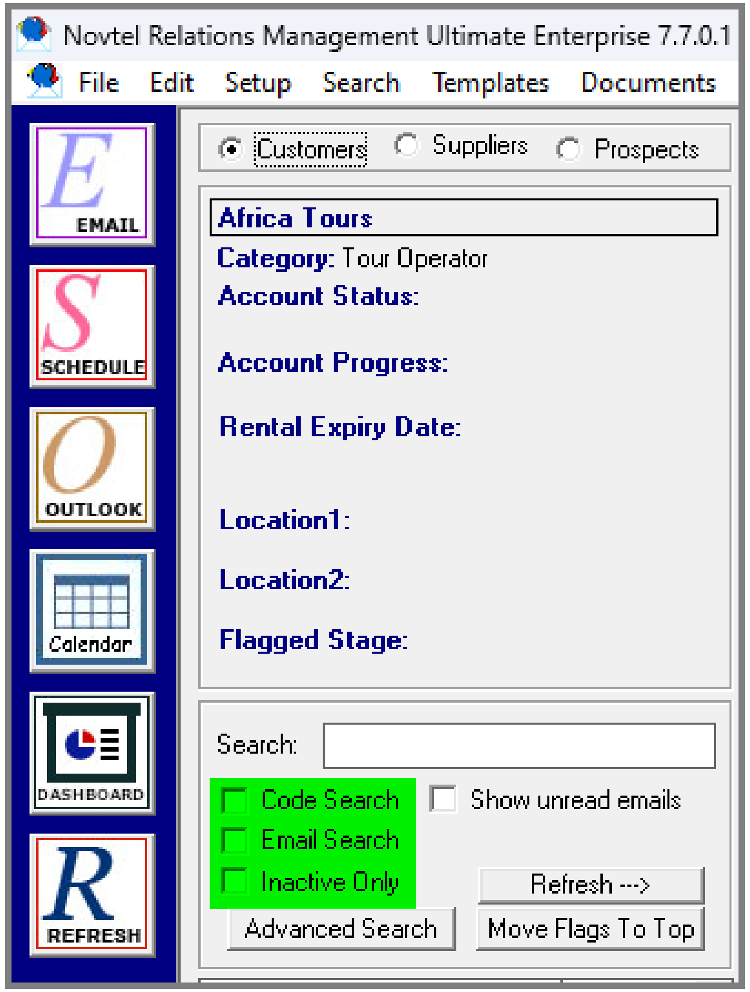
Per Customer, Supplier or Prospect Heading, **Advanced searches** can be performed to **filter Accounts** linked to the same:

- 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.

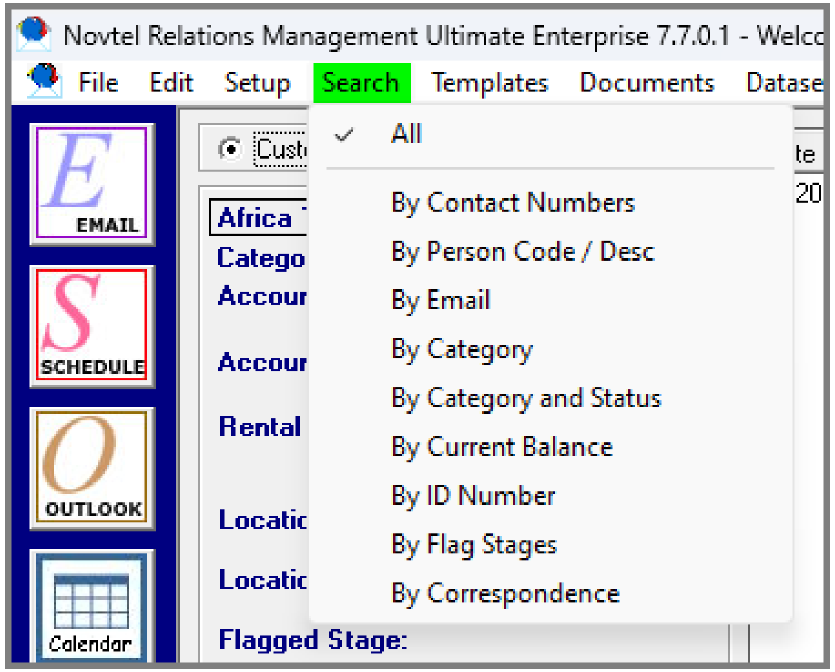
Please note that the more search criteria options are set, the more the specifically required accounts will be filtered.

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'.



Novtel®

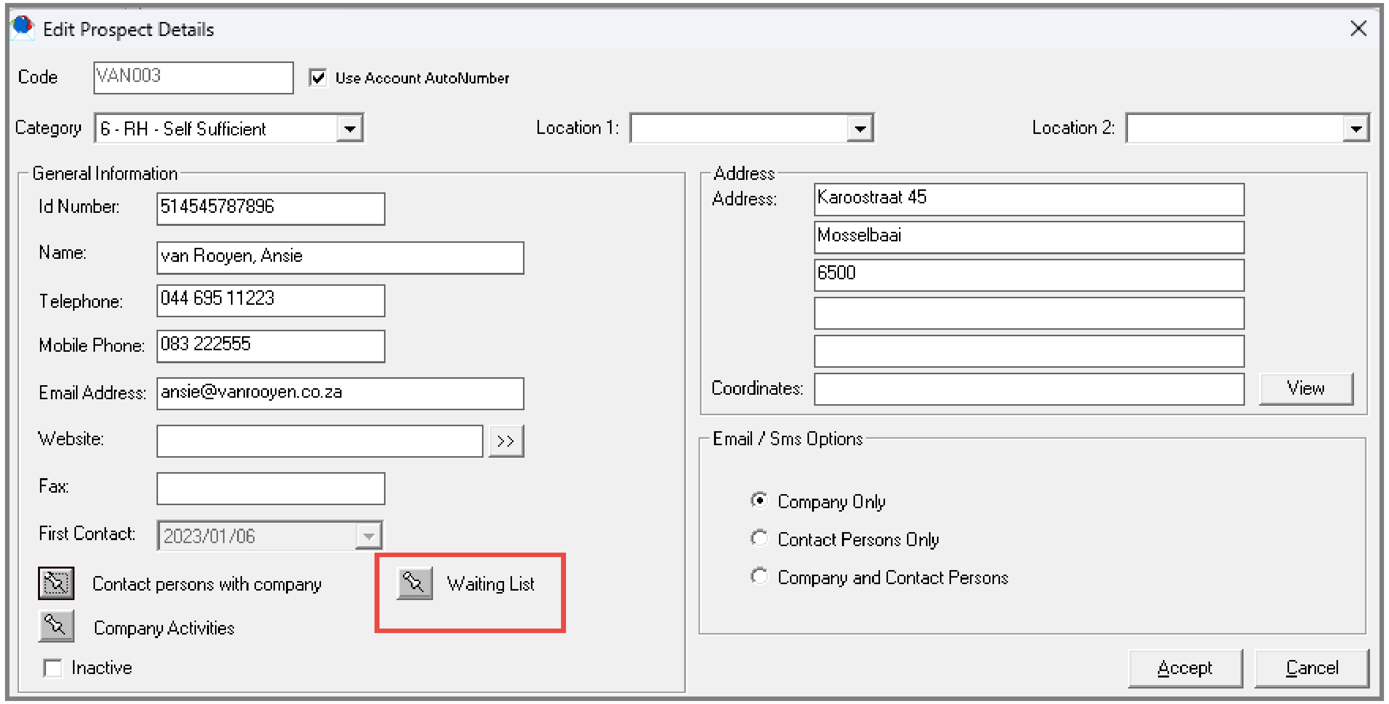
Relations Management

9

The Retirement Home Waiting List Functionality

Image by wahyu_t on Freepik

The Retirement Home Waiting List Functionality



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

This functionality entails the following steps:

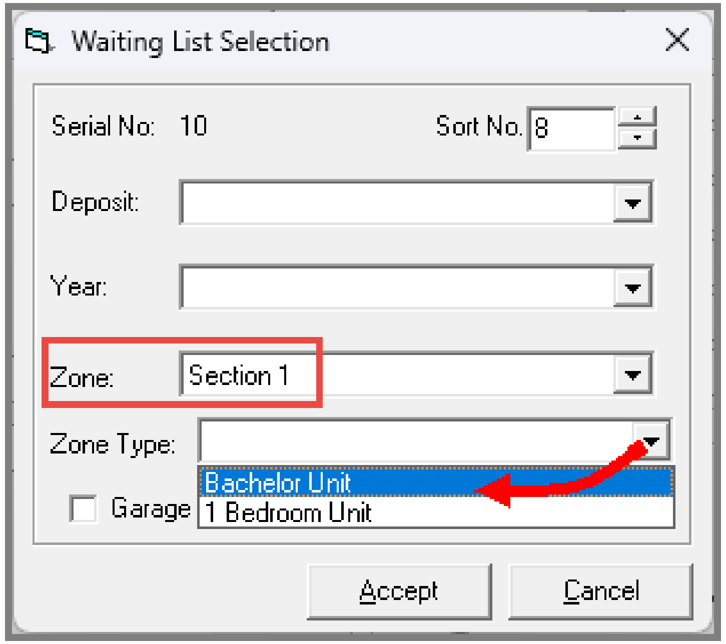
1. The ‘Retirement Home’ system must be activated;
2. Deposit Amounts must be set up;
3. The current year, or year during which the Prospective Resident could wish to take occupancy;
4. All Applicable ‘Zone’ and Accommodation Types available in the retirement village.
5. Prospect Master Files are to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

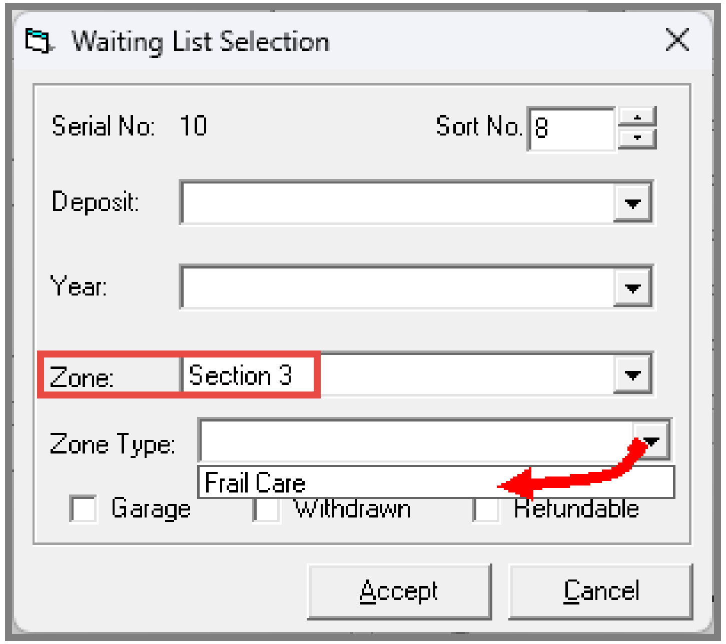
The Retirement Home Waiting List Functionality

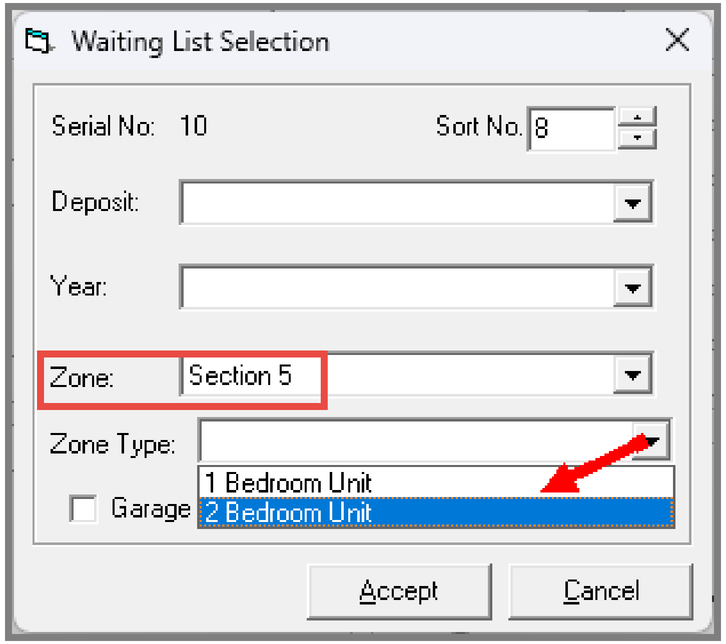
Zones and Types can be illustrated as follow:

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.







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

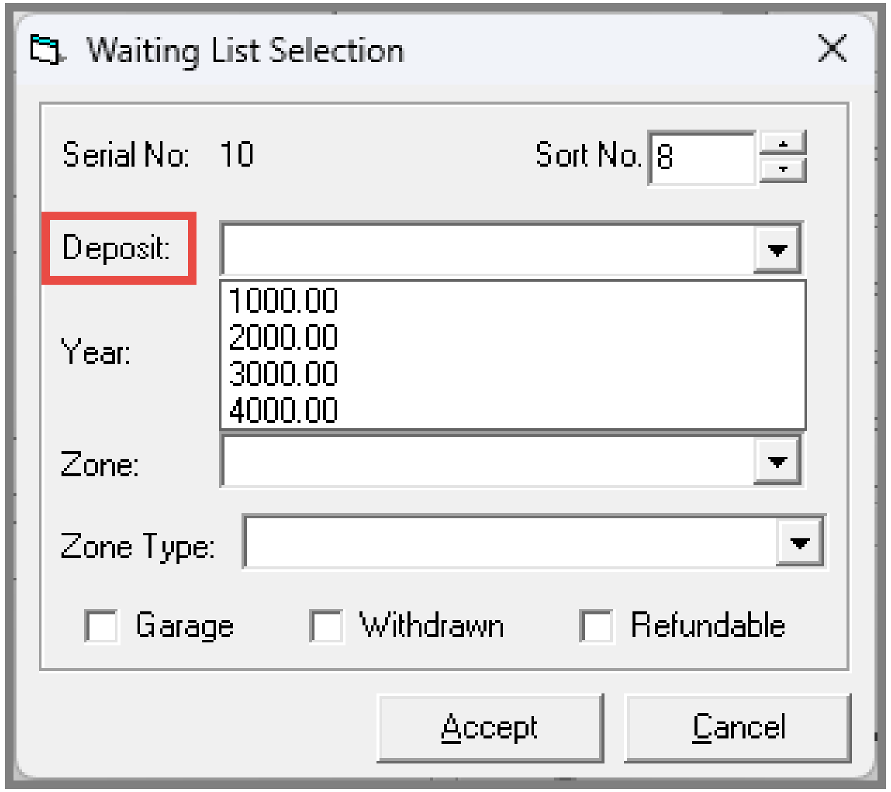
Section 3 Amount

- **Frail Care**
  R 3000.00

Section 4 and 5 Amount

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

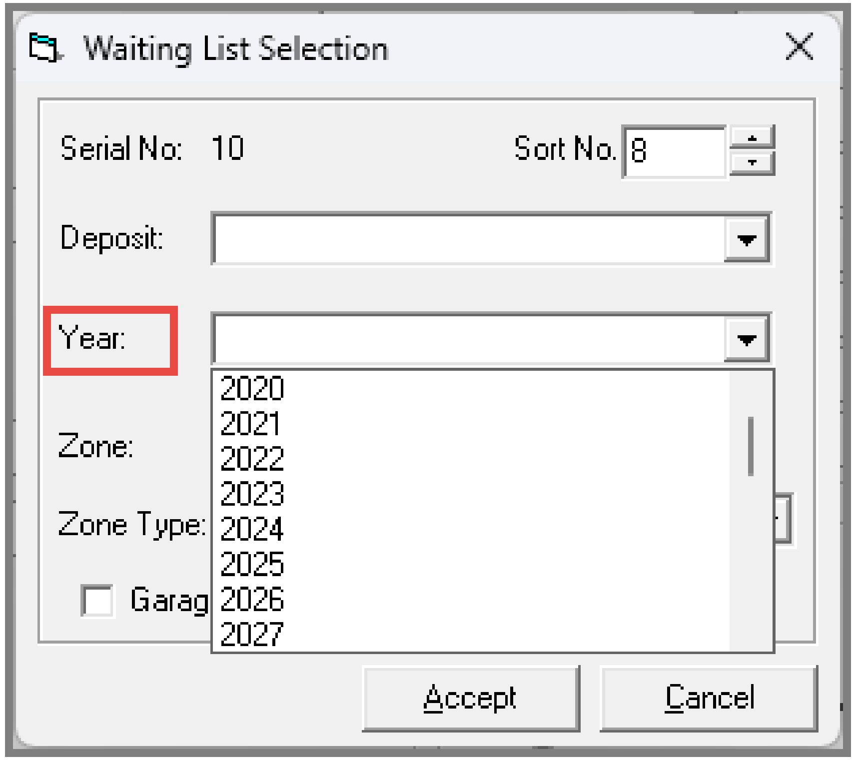
The pre-created amounts will be available for selection on the Prospect's 'Waiting List Selection' screen.



The Retirement Home Waiting List Functionality

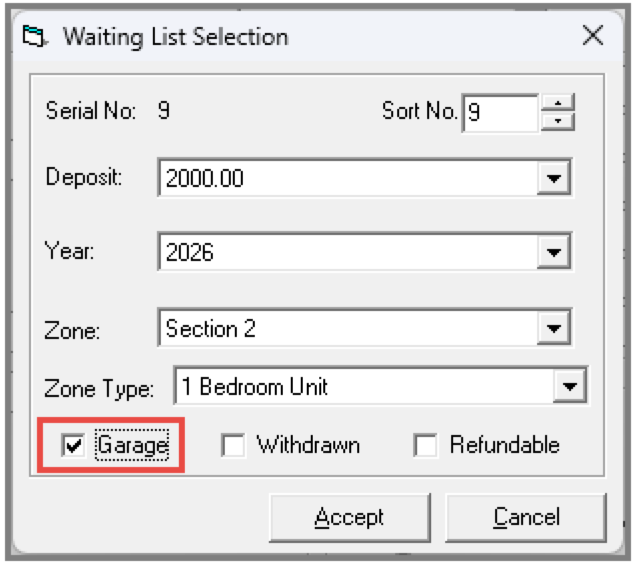
It might happen that prospective residents will request to be placed on the waiting list for a specific year in the future since they are not yet ready to move in.

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



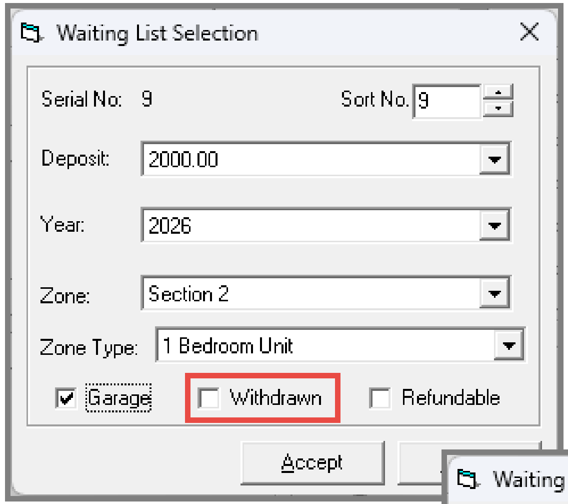
The years will now also be available for selection on the Prospect's 'Waiting List Selection' screen.

The Retirement Home Waiting List Functionality



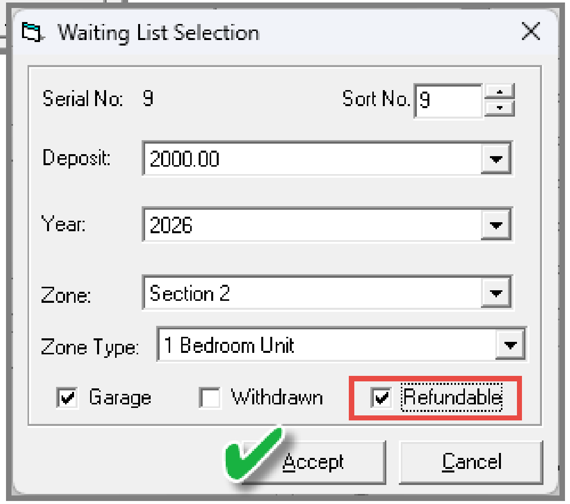
If a Garage is required, this option is selected.

If not, the checkbox is left unticked.



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.

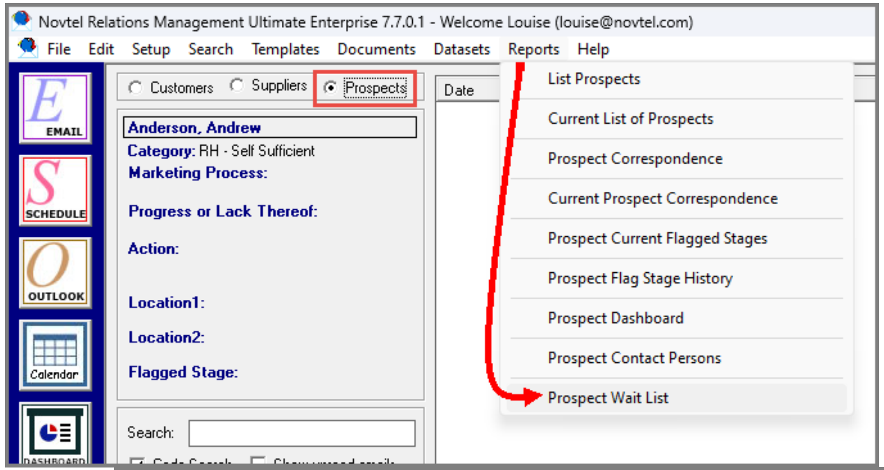


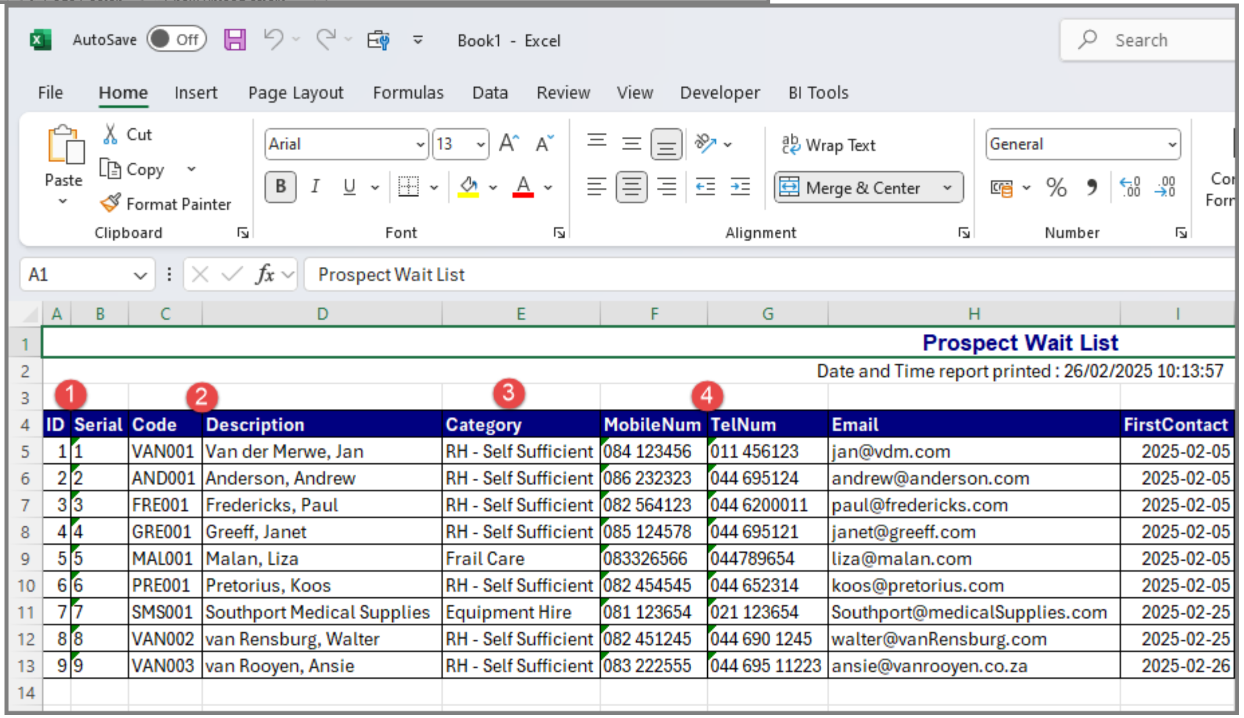
If the Deposit amount is to be refunded to the Prospect in the future, the ‘Refundable’ option is selected.

If not, the checkbox is left unticked.

To save the settings, click ‘Accept’.

The Retirement Home Waiting List Functionality





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 '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.

The Retirement Home Waiting List Functionality

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.

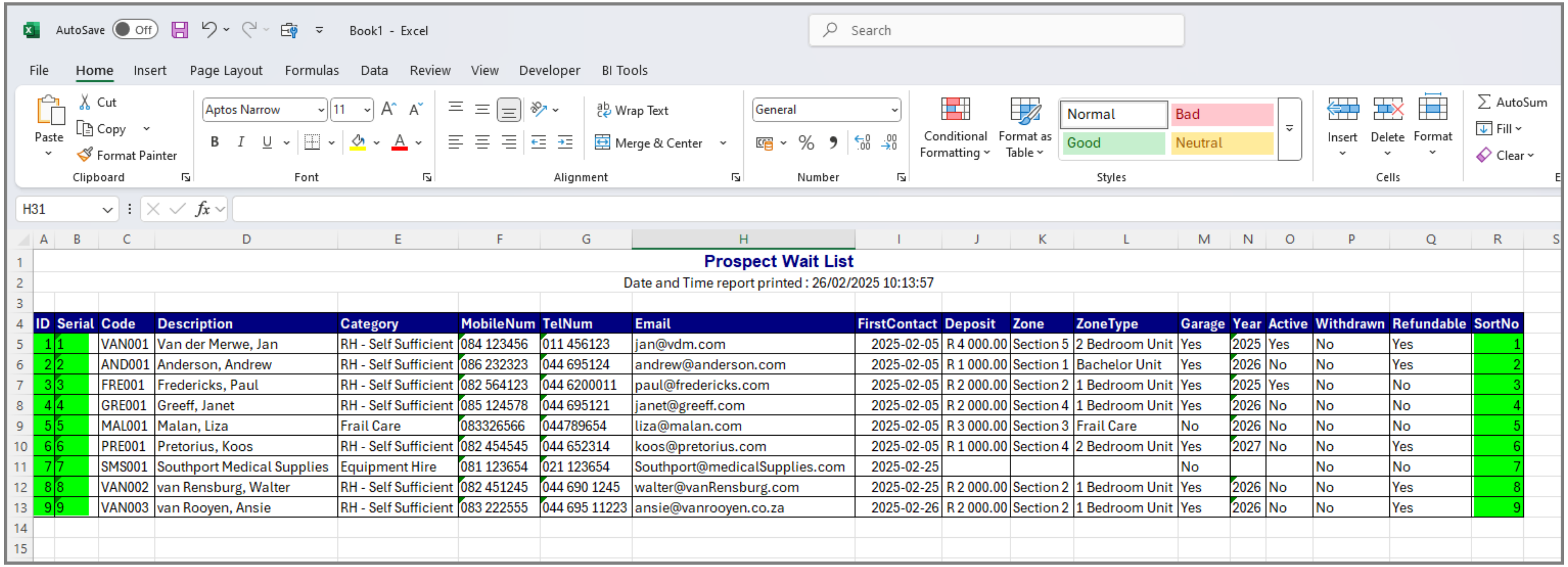
- ☐ If unticked, the wording is: ‘No’.
- ☑ If ticked, it is ‘Yes’. (In this case, the Prospect’s account can be deleted **if required** – which will remove them from the waiting list.)

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



Prospect Wait List

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

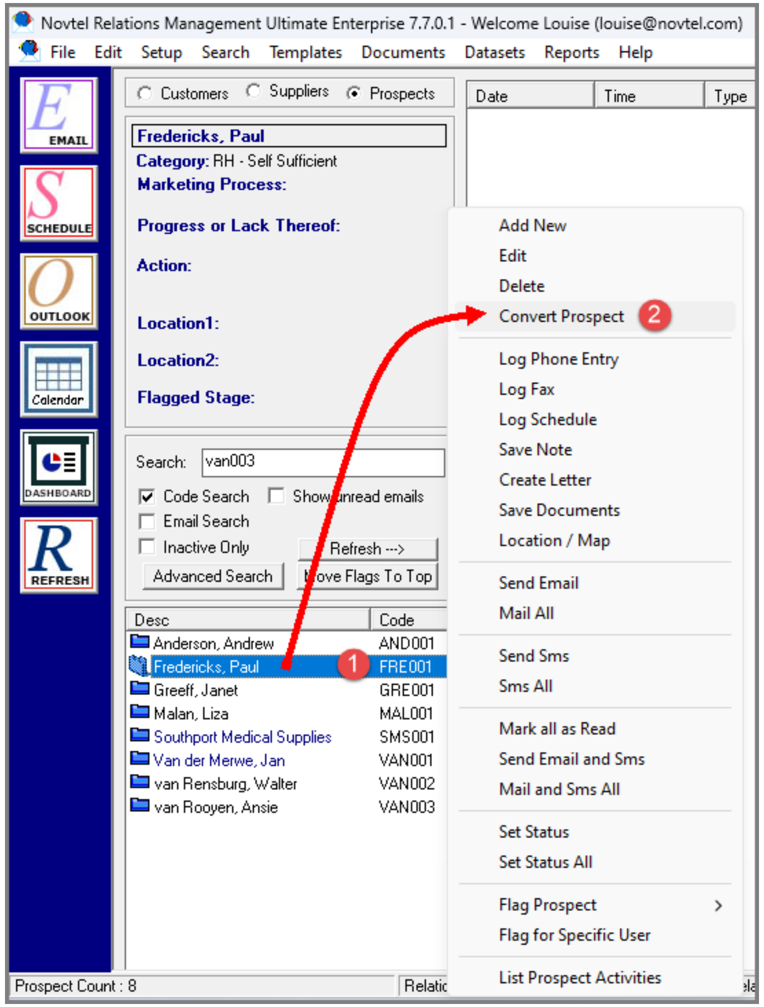
ID	Serial	Code	Description	Category	MobileNum	TelNum	Email	FirstContact	Deposit	Zone	ZoneType	Garage	Year	Active	Withdrawn	Refundable	SortNo
1	1	VAN001	Van der Merwe, Jan	RH - Self Sufficient	084 123456	011 456123	jan@vdm.com	2025-02-05	R 4 000.00	Section 5	2 Bedroom Unit	Yes	2025	Yes	No	Yes	1
2	2	AND001	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 6200011	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

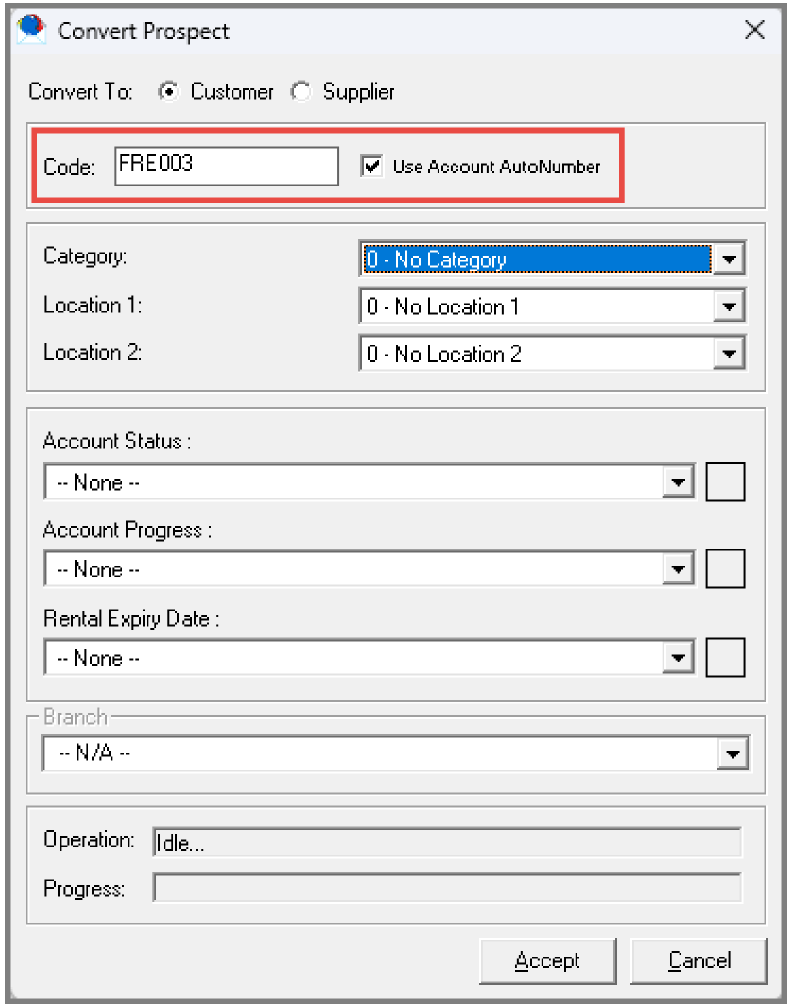


1. **Please Note:** Currently, the Prospect's code is indicated as 'FRE001'.

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

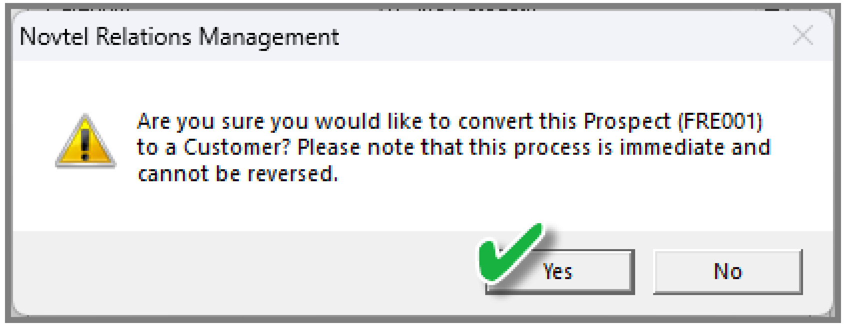
2. Right-clicking on the Prospect account and selecting the 'Convert Prospect' option, Novtel has checked for, and inserted the next available Customer Account Code as 'FRE003' at the top of the window since Customer Codes FRE001 and FRE002 already exist.

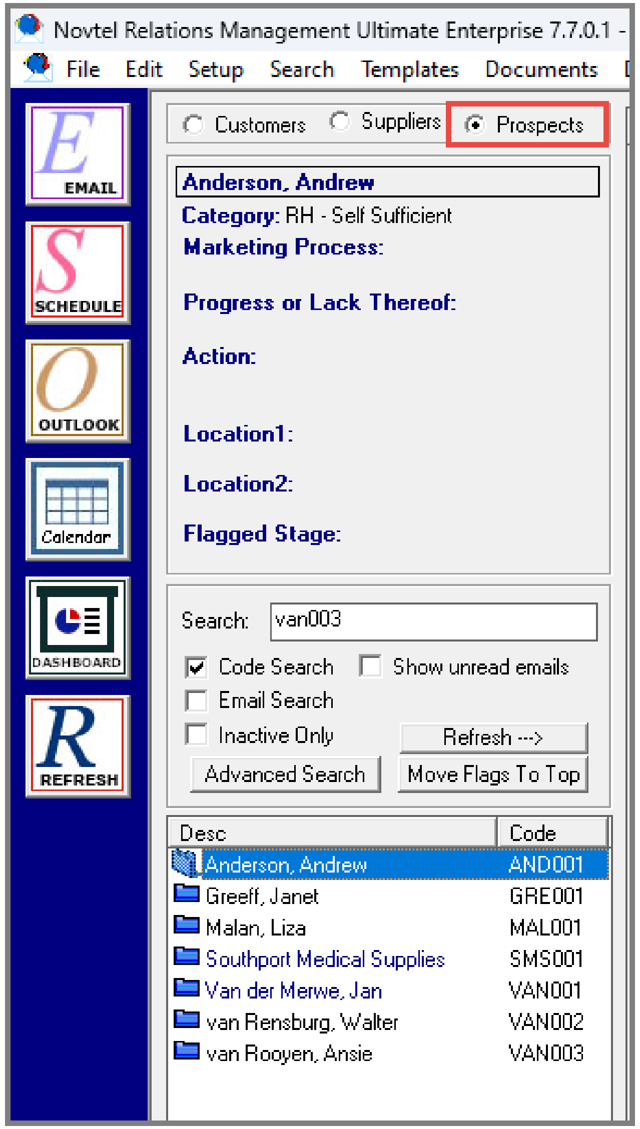
The applicable Customer Category and Locations can now be selected; the applicable statuses set, and the changes saved.

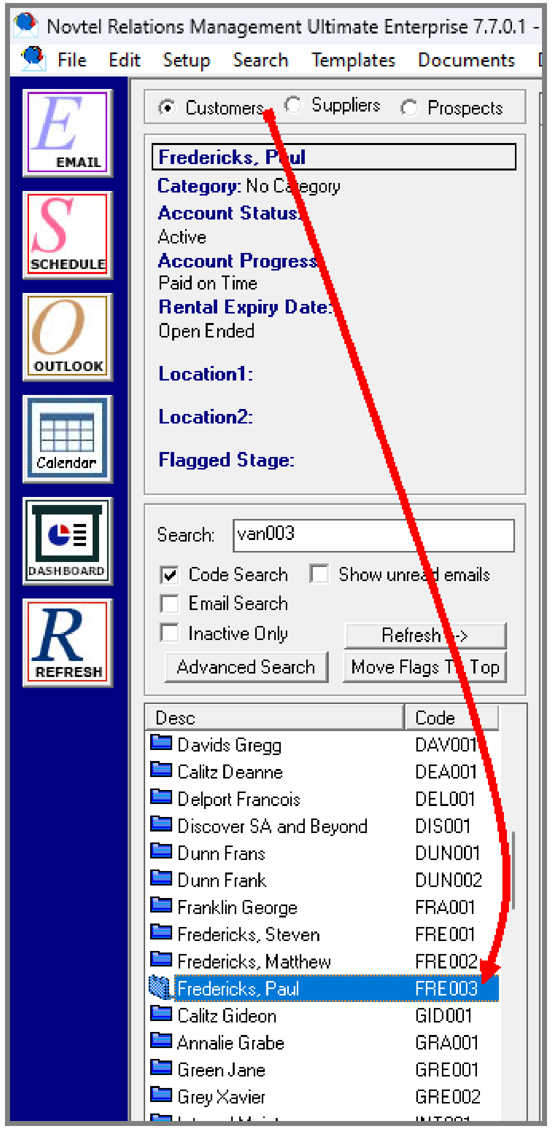


The Retirement Home Waiting List Functionality

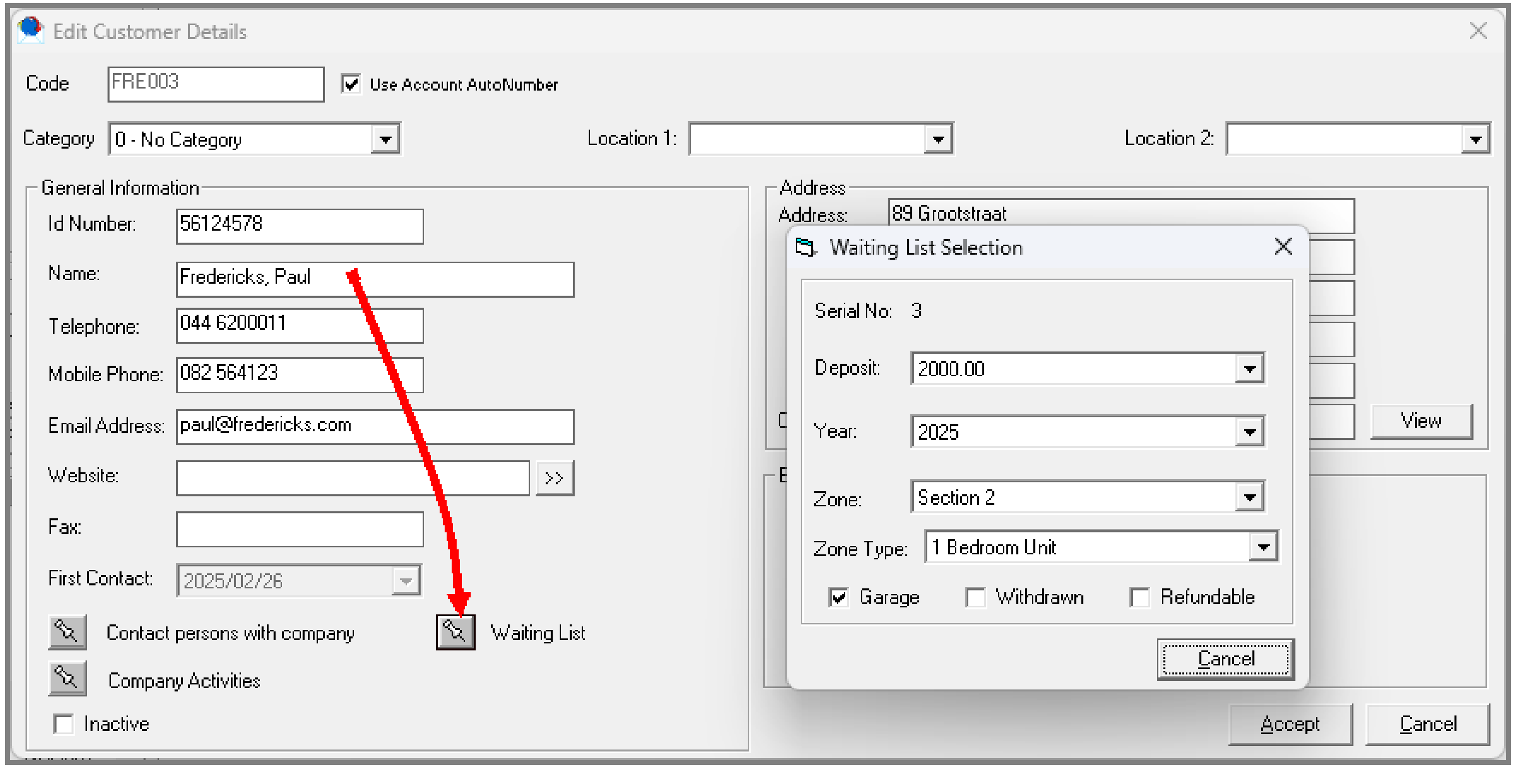
Clicking ‘Yes’ to confirm the action, the account is removed from the ‘Prospects’ list and displayed in the ‘Customers’ screen.





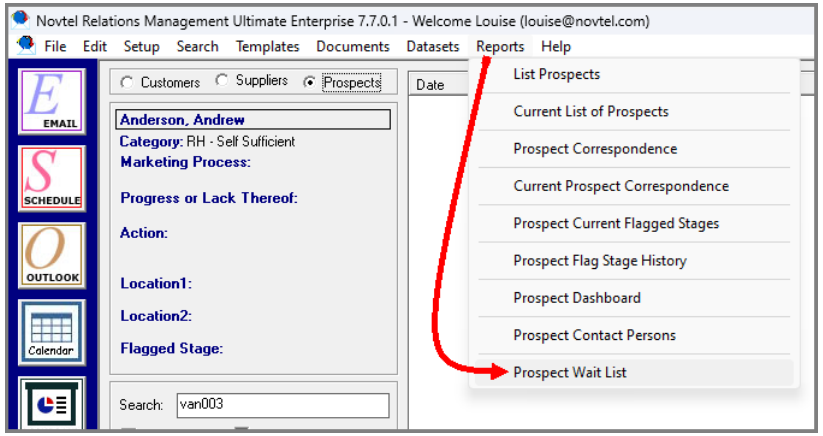


The Retirement Home Waiting List Functionality



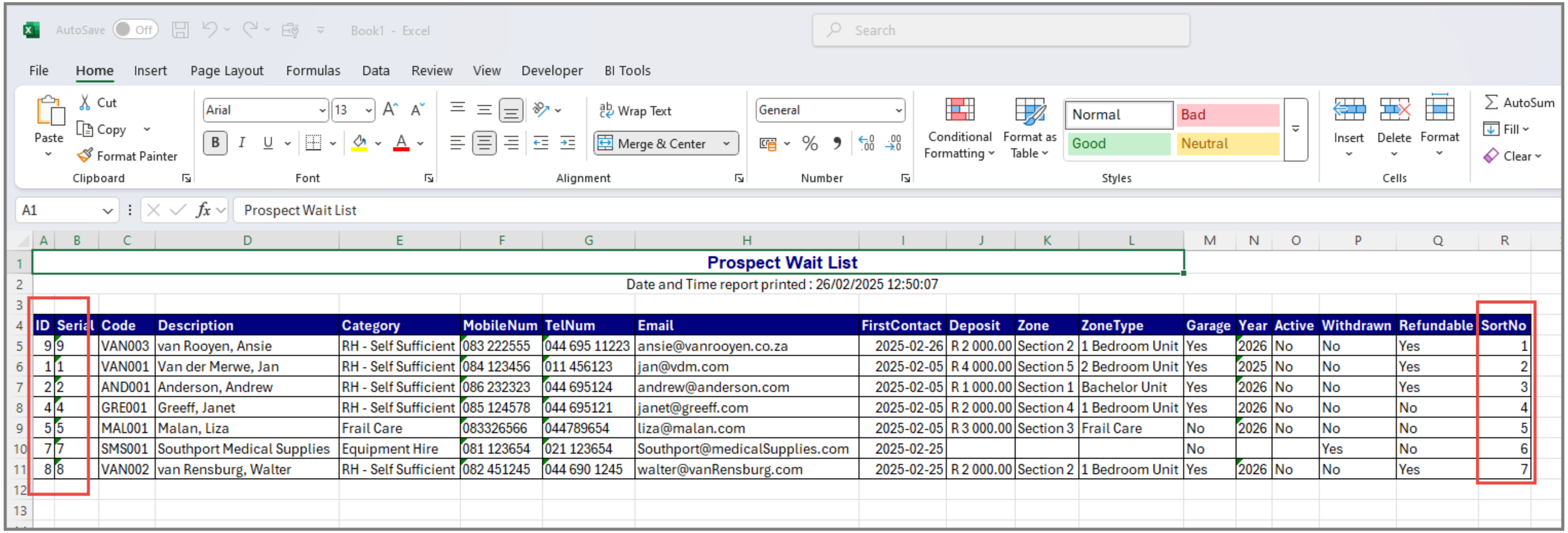
Accessing the Customer Master File, the waiting list details can be accessed, but the sort order number has been removed since this Customer is no longer a Prospect active on the waiting list.

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.



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

Image by wahyu_t on Freepik

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

<u>Prospects:</u>

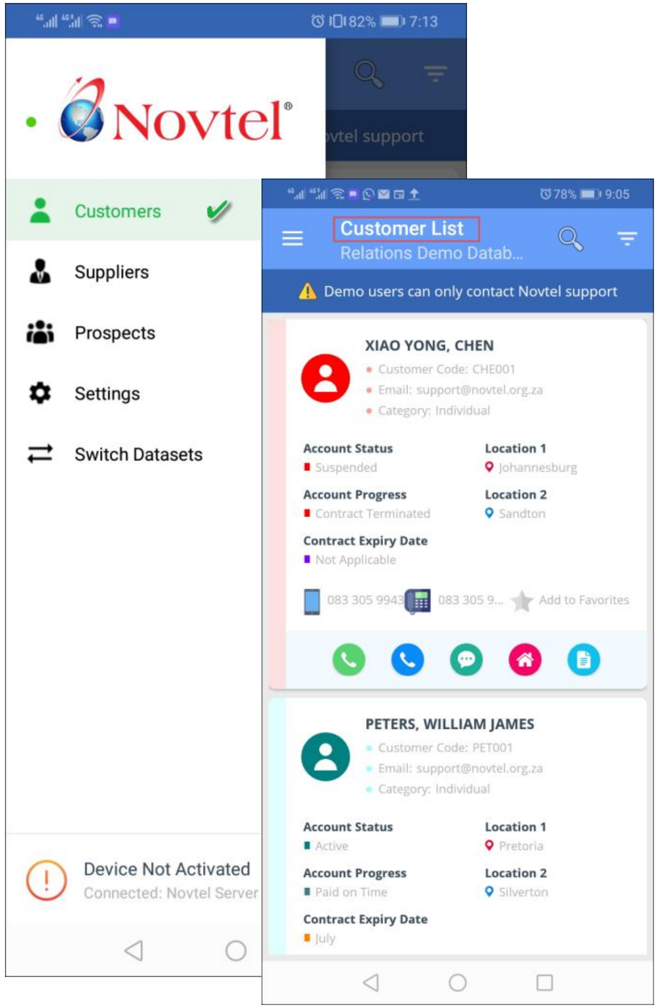
Also view and contact your Novtel Prospects via the methods listed above.

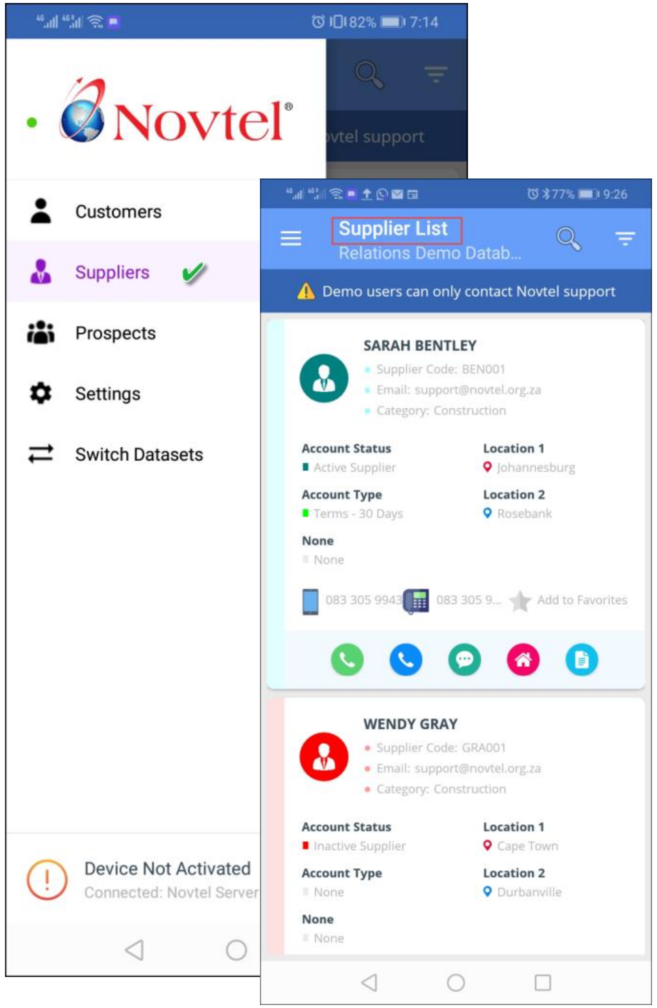
<u>Multiple Dataset Processing:</u>

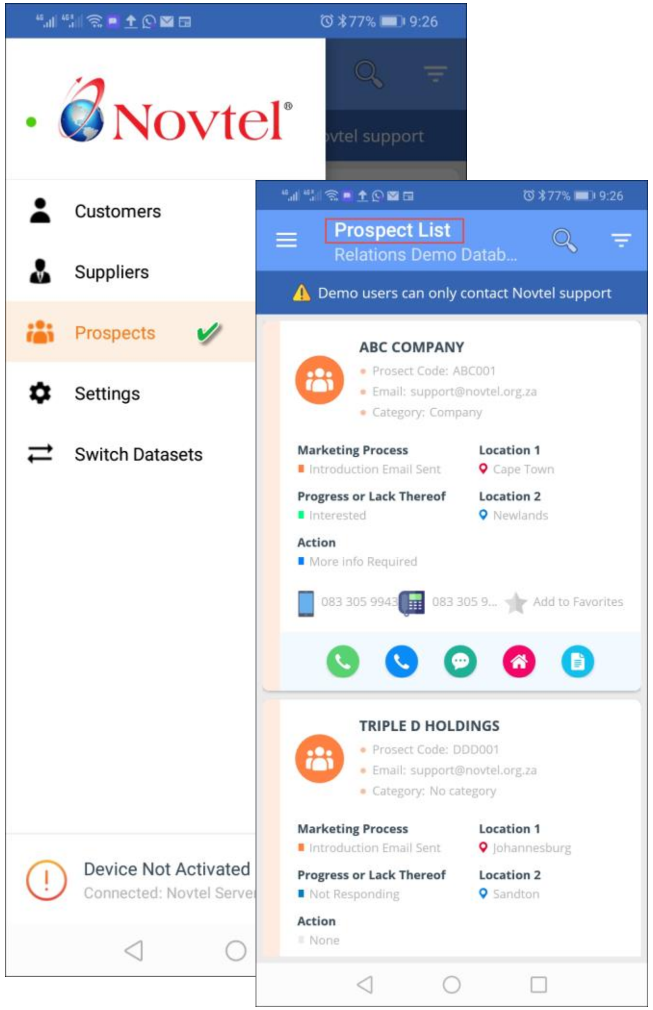
The app can display information from, and perform work in, any of the user's existing list of Novtel Relations datasets, making it quick and easy to manage correspondence on any dataset.

The Mobile App

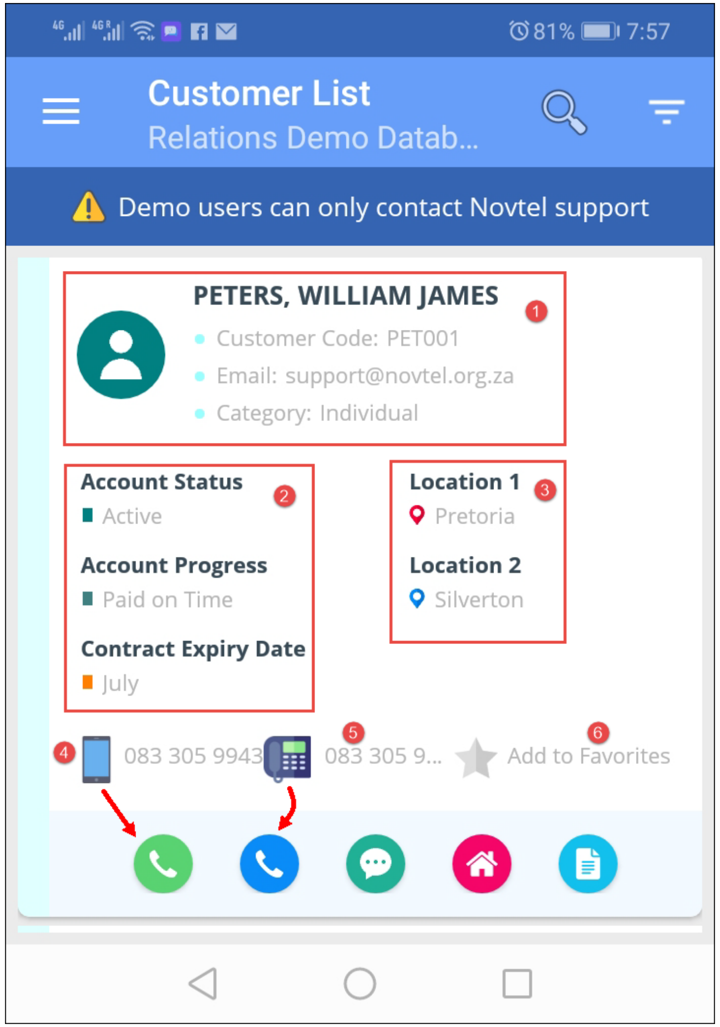
Customers, Suppliers and Prospect Accounts are accessed by clicking on the respective option in the Menu.





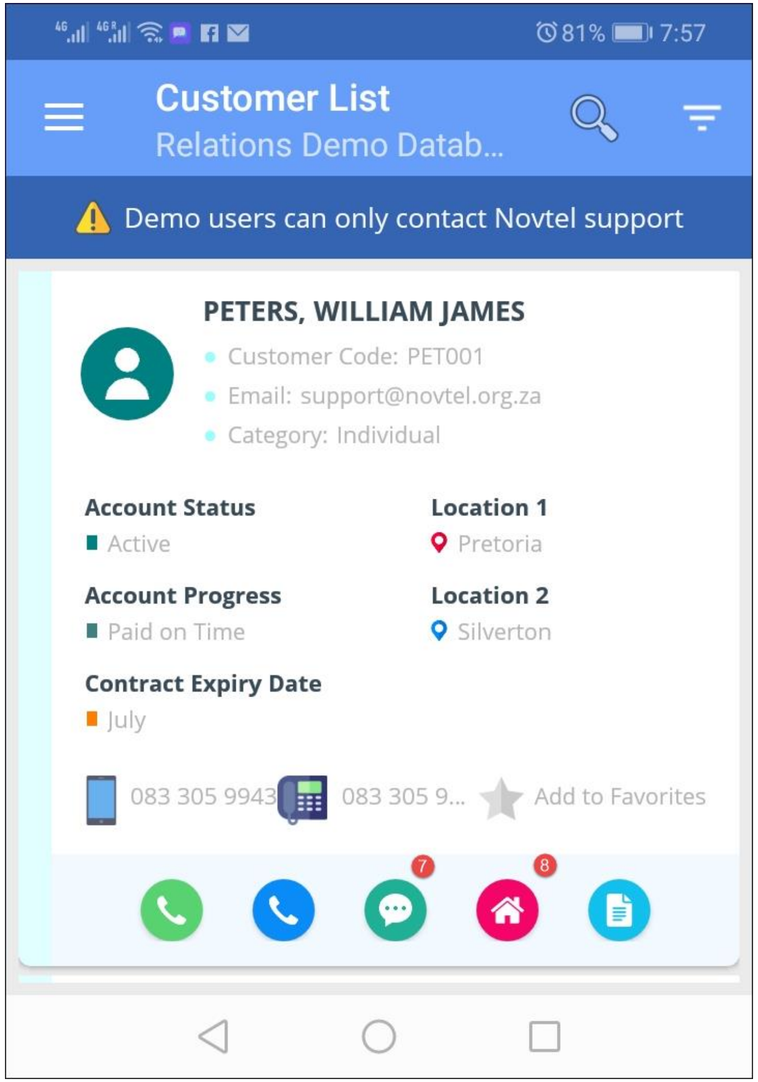


The Mobile App



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



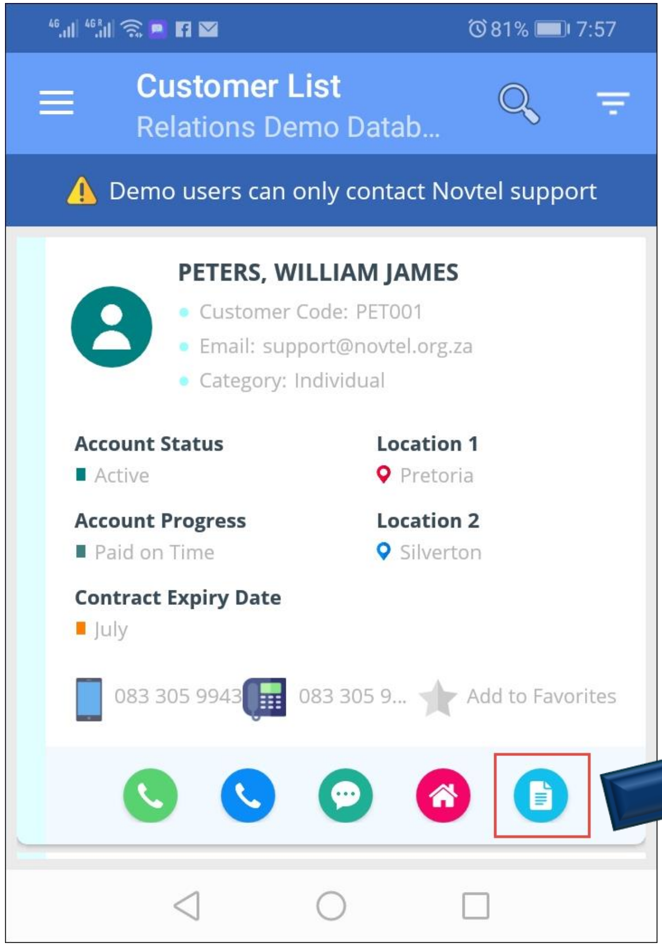
7. A WhatsApp message can be created and sent to the listed Cell number, by tapping the 'Message' icon.

8. **Google Maps integration:**

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

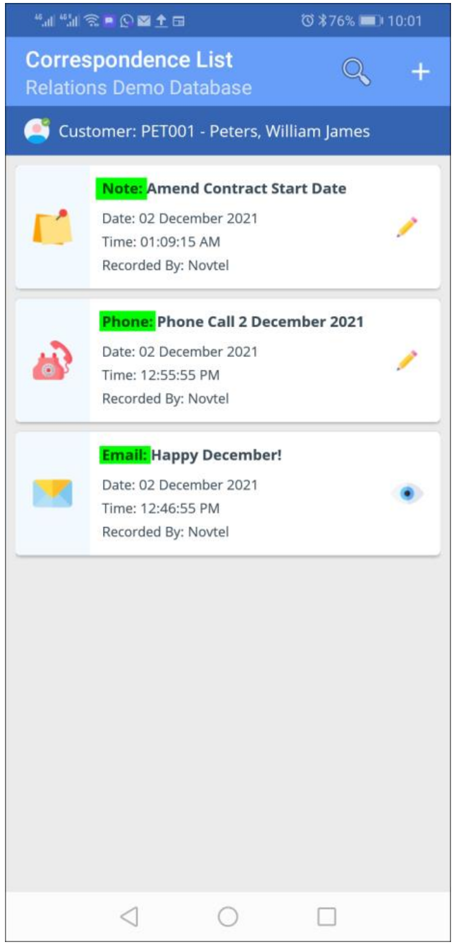
   Simply tap on this icon to set a pin in Google maps.

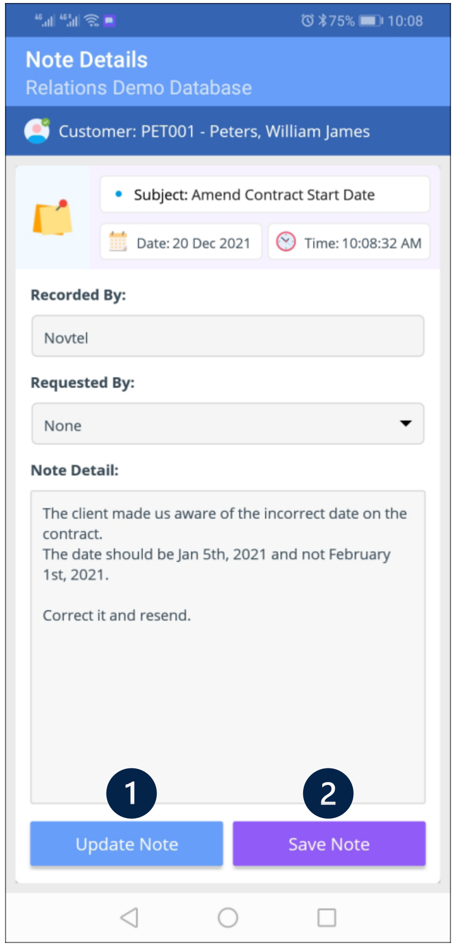
The Mobile App



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

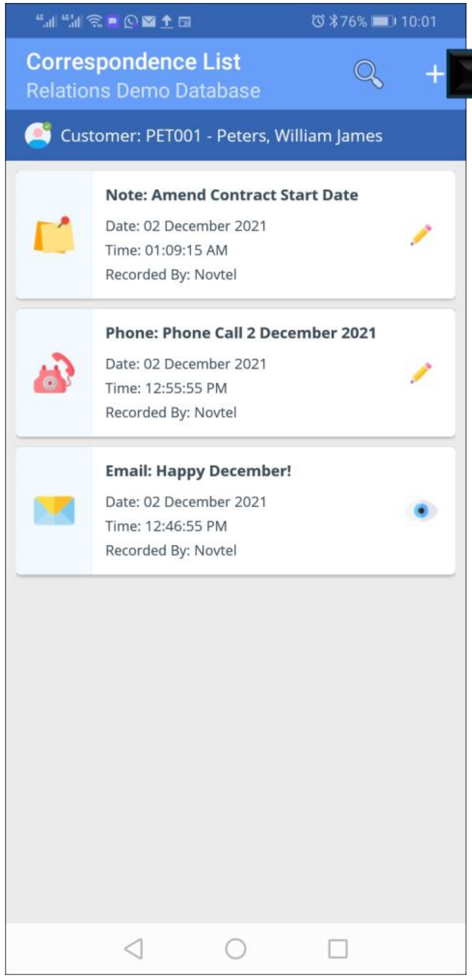
1. From here, the existing note can be amended and updated…
2. OR the note can be amended, and a new note saved.

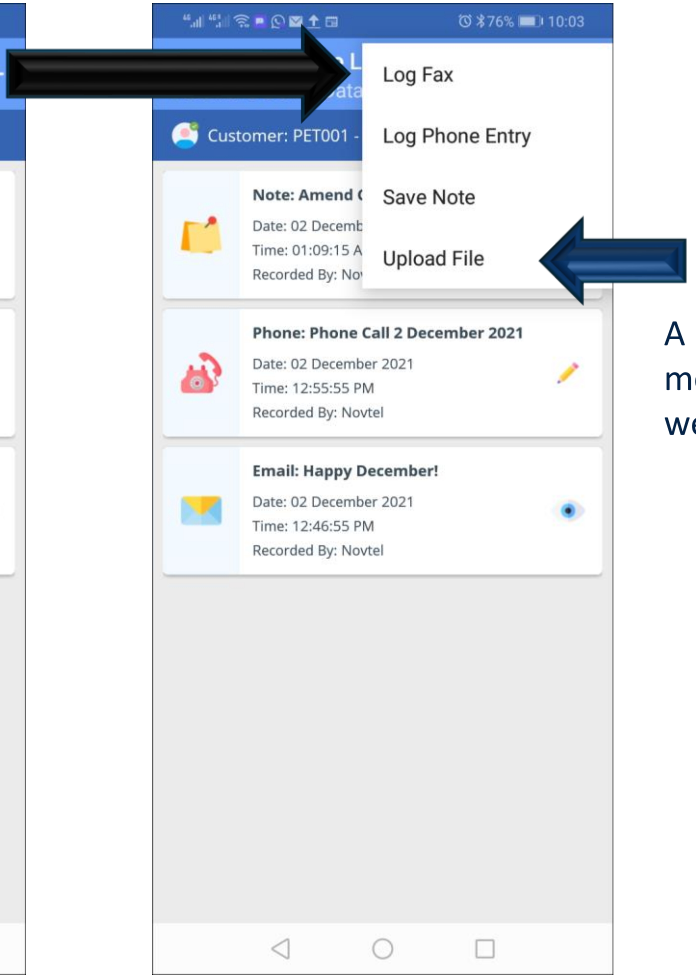




The Mobile App

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

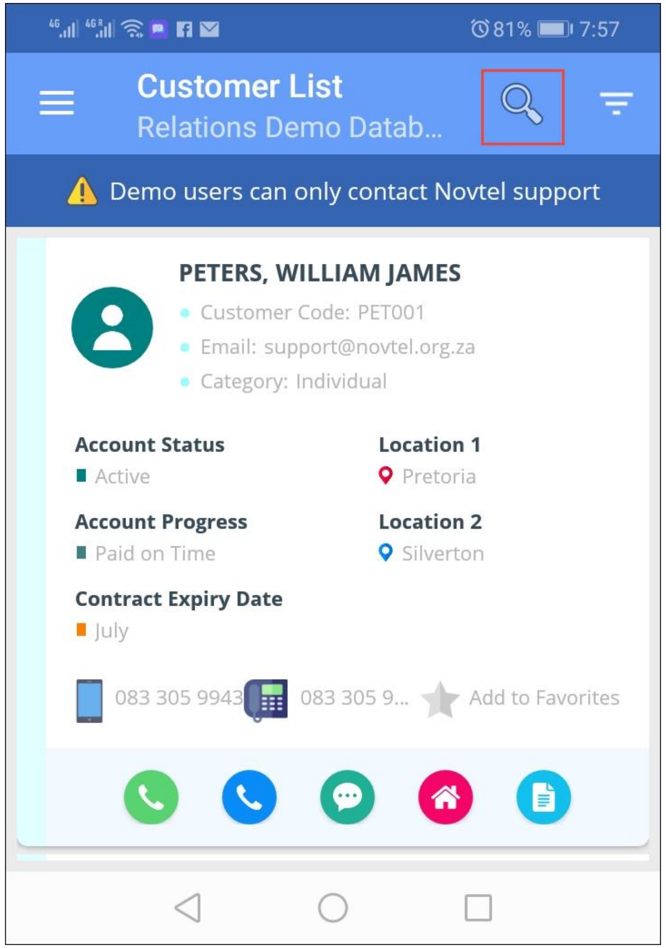


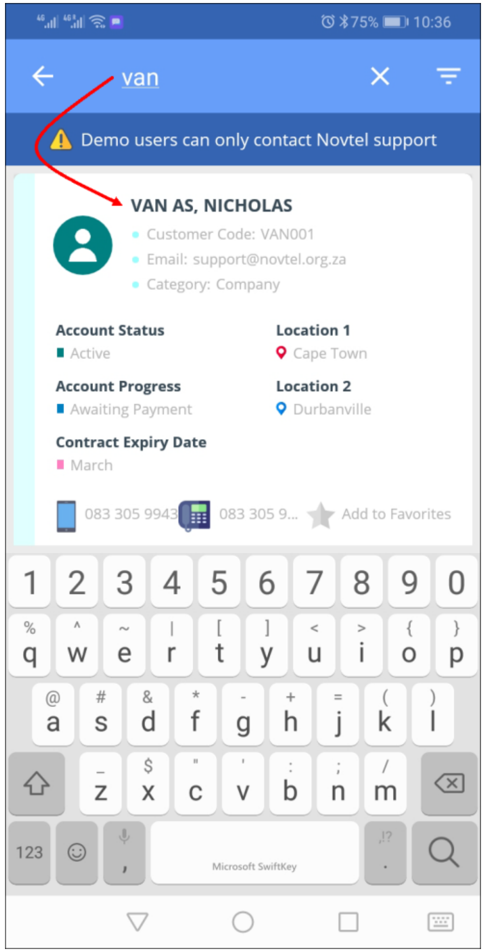


A new file can also be uploaded from the stored location on the mobile device and will be available to view directly in the app, as well as the desktop application.

The Mobile App

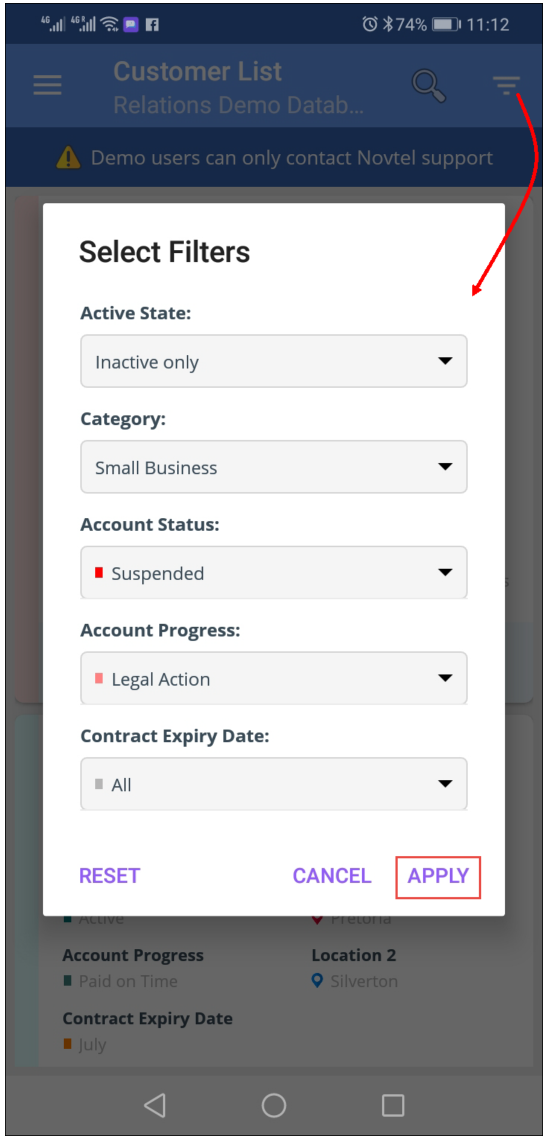
A Customer, Supplier or Prospect Account can be searched for by tapping the ‘Search’ icon in the relevant screen.





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:**

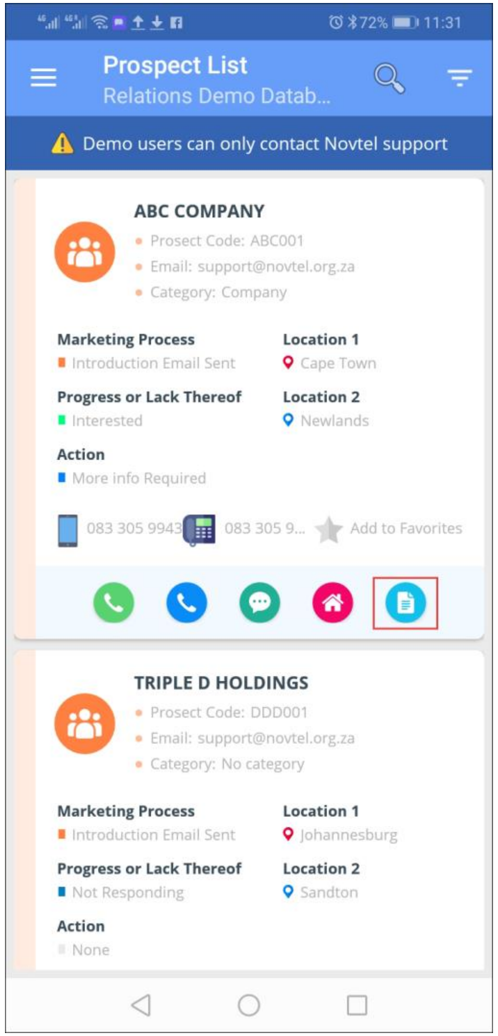
  A specified Customer, Supplier or Prospect Category.

- **Sub-Statuses:**

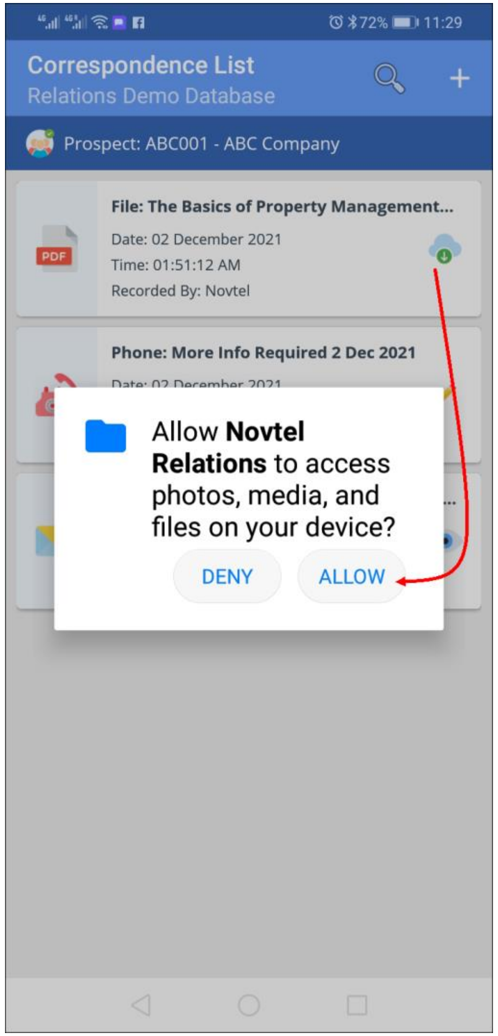
  A specified sub-status linked to a main status.

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.

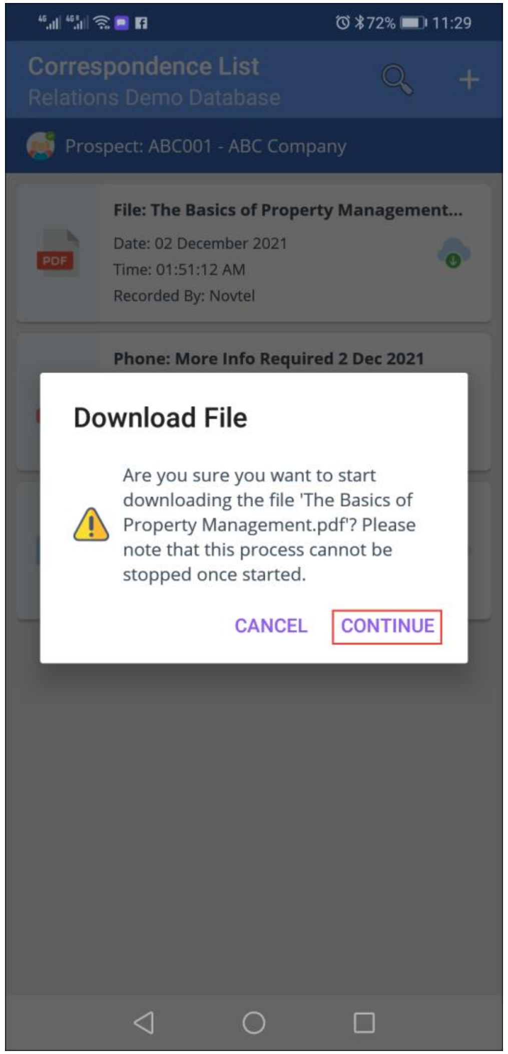


The document is now be tapped to be downloaded to the mobile device.

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.

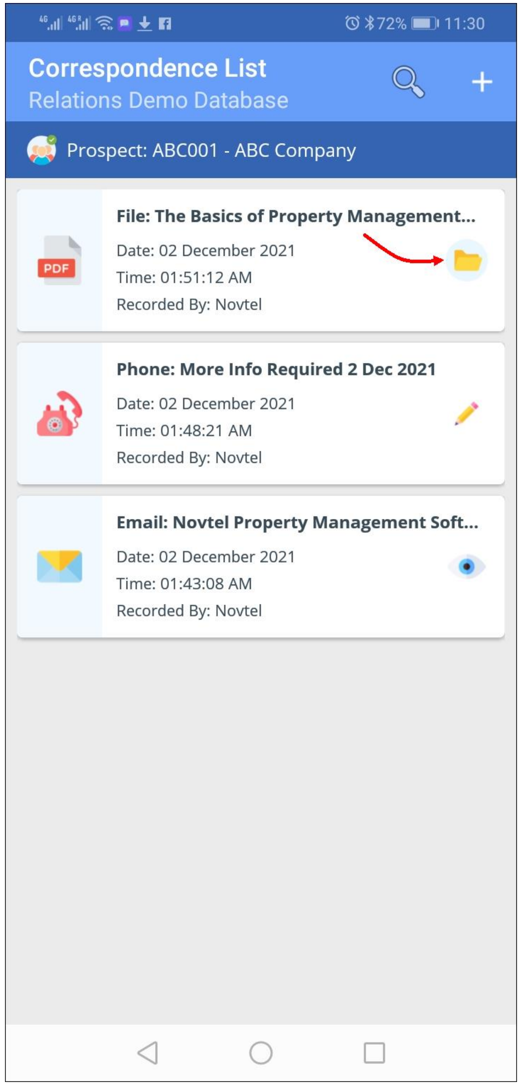
From now on, the communication will not appear again.

The Mobile App



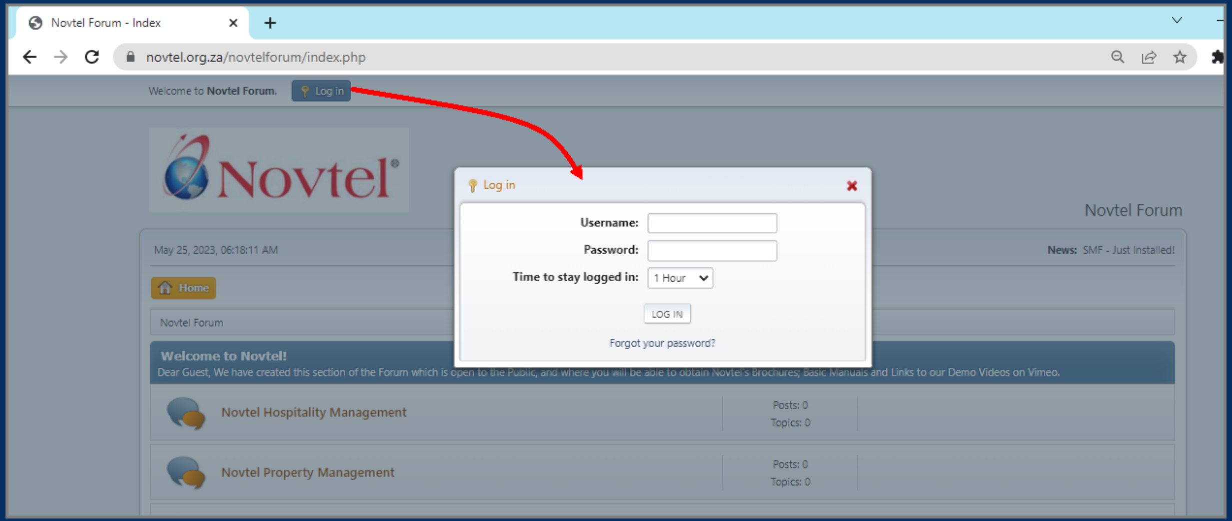
Tap ‘Continue’ to proceed with the downloading of the document.

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



NOVTEL FORUM LOGIN LINK

https://novtel.org.za/novtelforum/



For registered Novtel Clients, a Forum Login is created from where they can access all available manuals and latest product versions and release notes.

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