Novtel

Procurement

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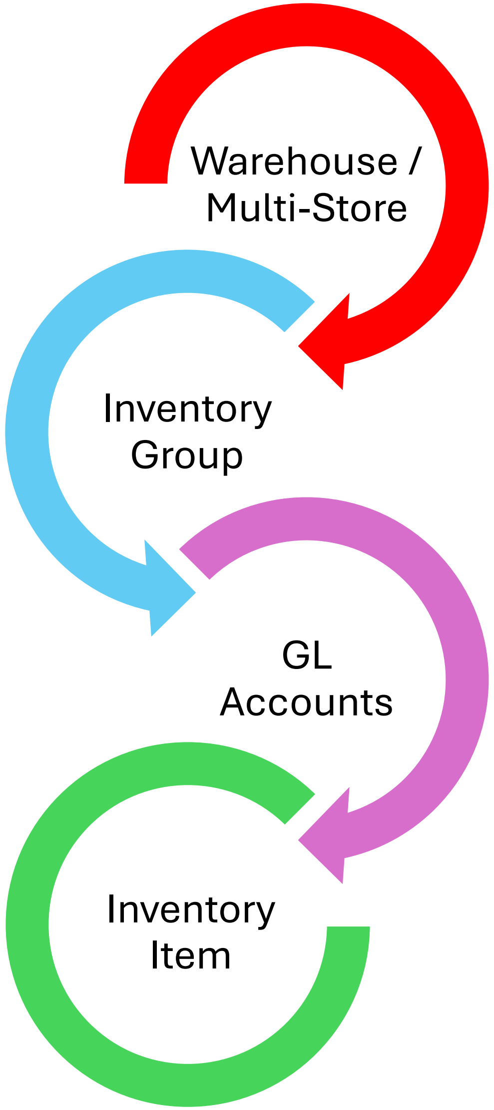
 V2

Novtel Procurement

Novtel Procurement Integrates with Sage 50c Pastel Partner and 200 Evolution.

- ✓ Novtel System Users can be linked to a dedicated **Warehouse / Multi-Store** in the financial system, and when a User creates a product, it will be imported to the Warehouse linked to their User Profile.
- ✓ **Inventory Groups** are to be created to manage the different Income Streams in your Company.
- ✓ Specific **GL Accounts** are created and linked to the Inventory Groups.
- ✓ And lastly, your company's **inventory items** are linked to specific Inventory Groups – which in turn are linked to a warehouse / multi-store.



Novtel Procurement

Inventory Items in the linked financial system, can be imported to Novtel in a matter of a few clicks.

Sage

Inventory Items

Novtel

Products

Likewise, can Products be created in Novtel and imported to the integrated financial system.

Novtel

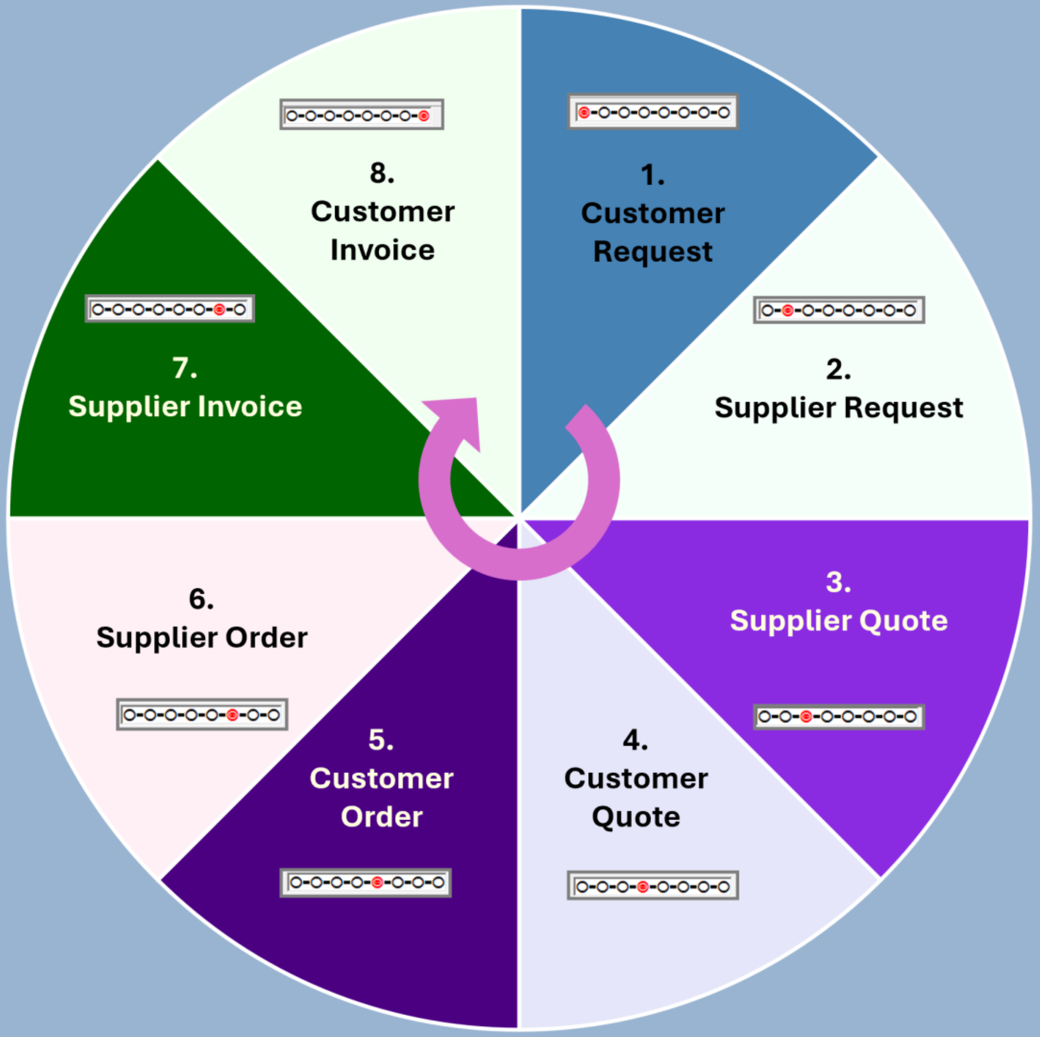
Products

Sage

Inventory Items

The External Procurement – Agency Cycle

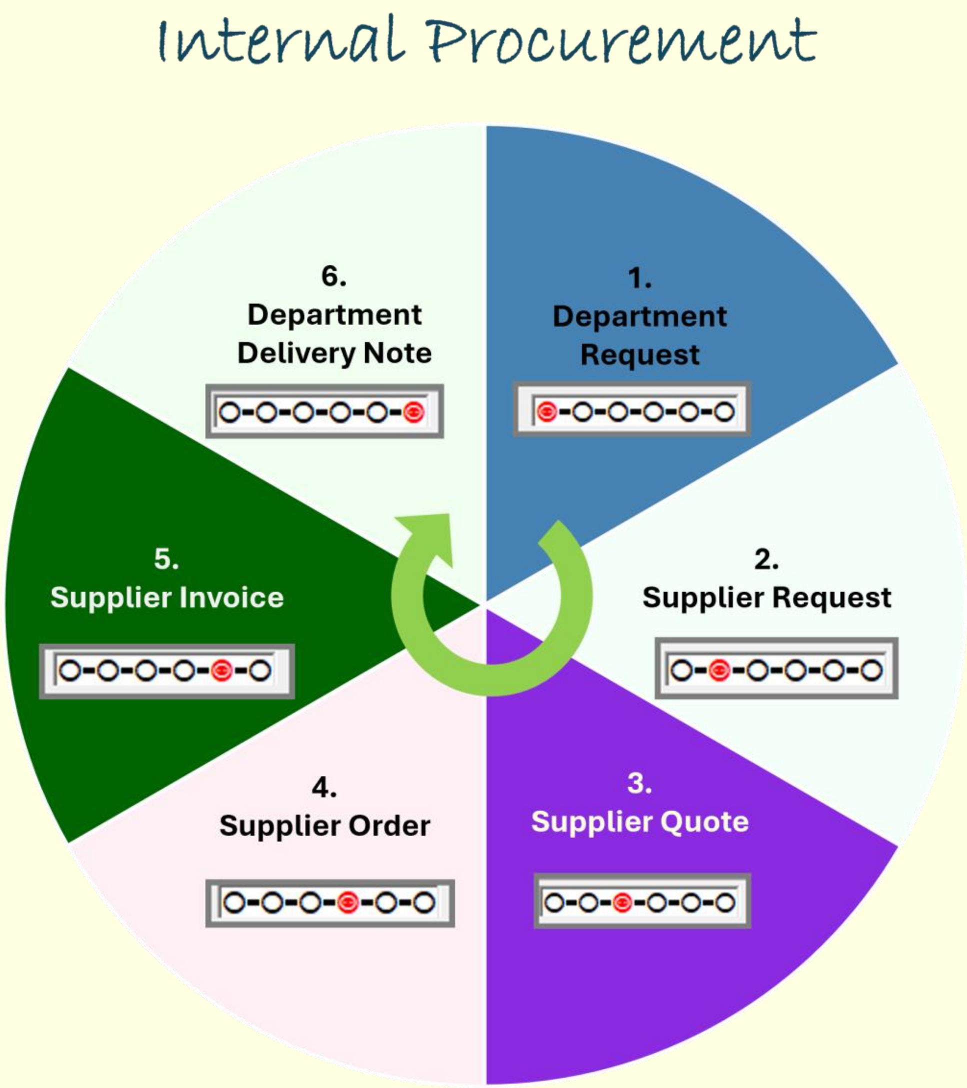
External Procurement



The External cycle is as follows until the process is completed:

1. Your Customer will request certain items to be quoted on, and therefore, the **Customer Request** is created.
2. Based on the Customer's request, your company will produce the **Supplier Request** and send it to all Suppliers carrying the required product(s).
3. The **Supplier Quotes** will be emailed to your company, and it must be captured in Novtel.
4. Based on the Supplier Quotes obtained, the **Customer Quote** will be issued.
5. If the Customer Quote is accepted, the **Customer Order** is created.
6. Based on the Customer's order, the **Supplier Order** will be sent.
7. The **Supplier Invoice** will be captured when received.
8. Lastly, the Customer Invoice is issued for goods supplied.

The Internal Procurement Cycle



The Internal cycle is as follows until the process is completed:

1. A Department within your company will request certain items to be delivered, and therefore, the **Department Request** is created.
2. Based on the Department's request, the **Supplier Request** will be produced and sent to all Suppliers carrying the required product(s).
3. The **Supplier Quotes** will be emailed to your company, and it must be captured in Novtel.
4. The **Supplier Order** will be sent to the Supplier for the required goods.
5. The **Supplier Invoice** will be captured when received.
6. Then, the **Department Delivery Note** is issued for goods delivered.

Customers

- ✓ For each Customer, multiple contact persons can be captured. By setting a default contact, this person will be linked to all Customer documentation, but can be changed, if required.
- ✓ The Customer's preferred currency can be set if the 'Multi-Currency' module is installed and set up in the financial system.
- ✓ Secondary Customers can refer to a department or affiliation of a company to which an order is to be supplied.
- ✓ The main Customer will therefore be – for example – the head office buying stock for another branch.
- ✓ When the Customer Invoice is issued, the order can be sent to either the main Customer or Secondary Customer's Address.

Suppliers

- ✓ Supplier Accounts are created in Novtel for the purpose of obtaining quotations for the required products to be sourced.
- ✓ Dedicated contact persons are added per Supplier Account, and a specific person can be classified as the default person to be contacted.
- ✓ Per Supplier, the Brands they support are linked, and a report can be obtained to list all Suppliers supporting a specific Brand.
- ✓ If set up, the dedicated currency in which the Supplier trades, must be set on their account.

System Messages

System Messages can be set up to display on the following documents automatically when it is created in Novtel:

- ✓ Customer Request / Department Request
- ✓ Supplier Request
- ✓ Customer Order
- ✓ Supplier Order
- ✓ Supplier Quote
- ✓ Customer Quote
- ✓ Supplier Invoice
- ✓ Customer Invoice / Department Delivery Note

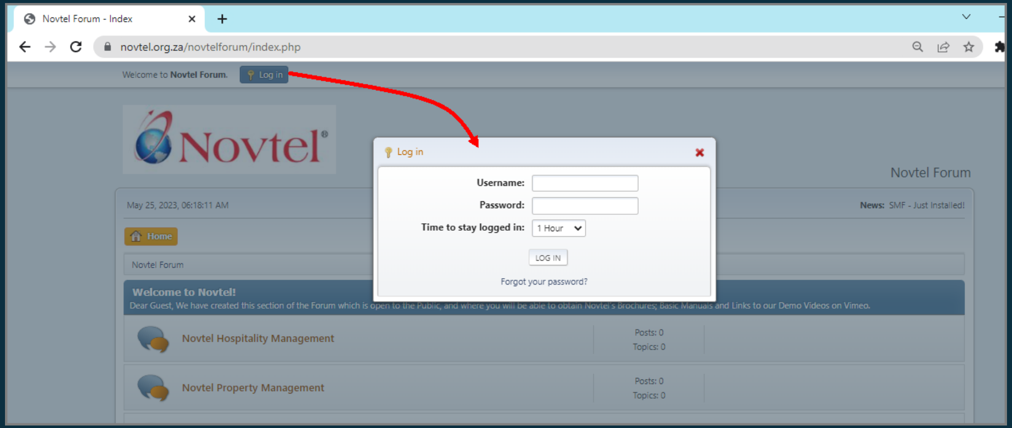
Per transaction document, the message can be altered to add more, or less information as required.

Job Codes

- ✓ Job Codes can be linked to a transaction as from the Customer Order level.
- ✓ Job Codes are actually ‘Projects’ in Sage Pastel and ‘Cost Codes’ in Sage Evolution and can either be created in the linked financial system, or in Novtel.
- ✓ The ‘Project’ will be available for selection in Novtel after being created in Sage, and vise versa.

NOVTEL FORUM LOGIN LINK

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

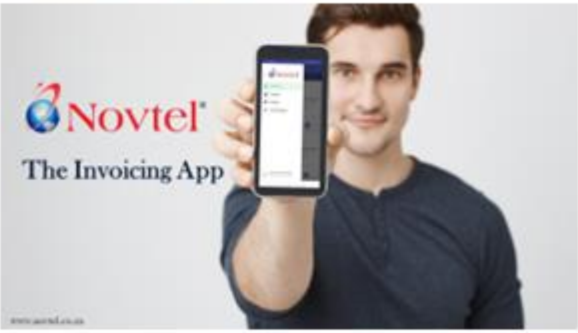


For registered Novtel Clients, a Forum Login is created from where they can access all available manuals and latest product versions and release notes.

For non-registered Guests, the public section is available from which all Basics manuals for ALL Novtel's products can be downloaded.

https://x.com/NovtelSoftware

www.linkedin.com/company/novtel-software-training



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