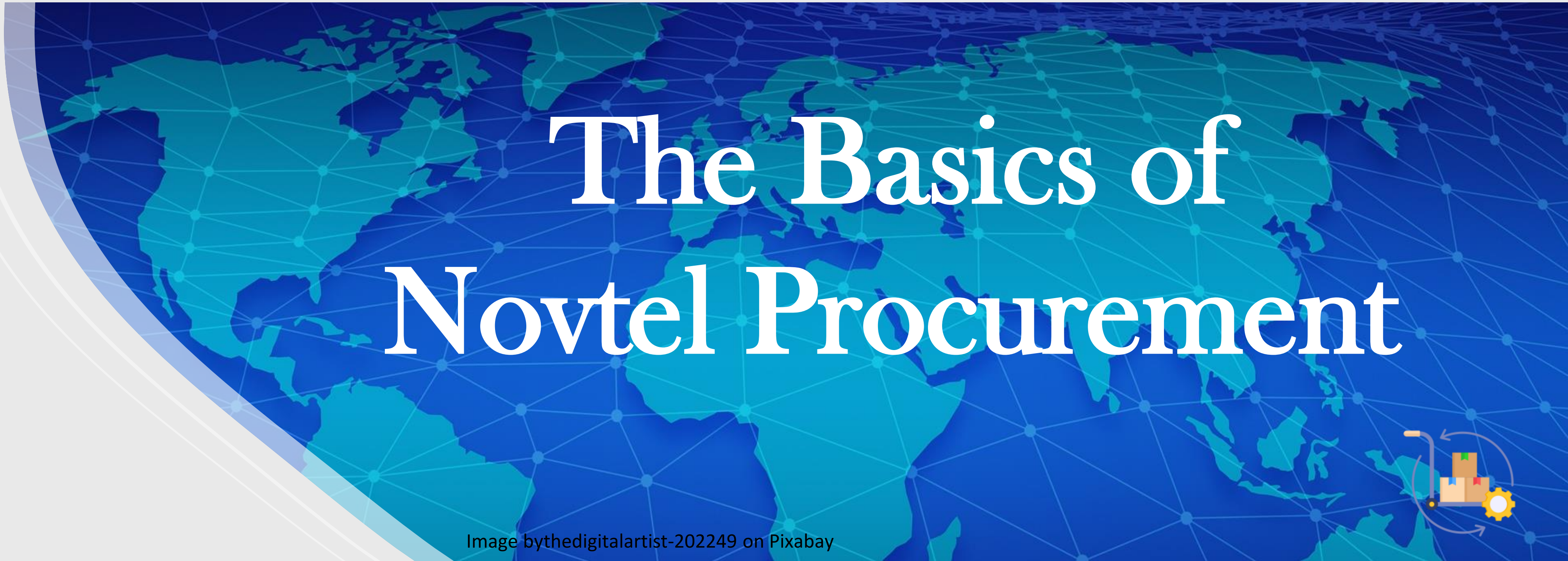
Novtel Procurement

Image by senivpetro on Freepik

# The Basics of Novtel Procurement



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# Novtel Procurement

## The Basics of Novtel Procurement

## INDEX

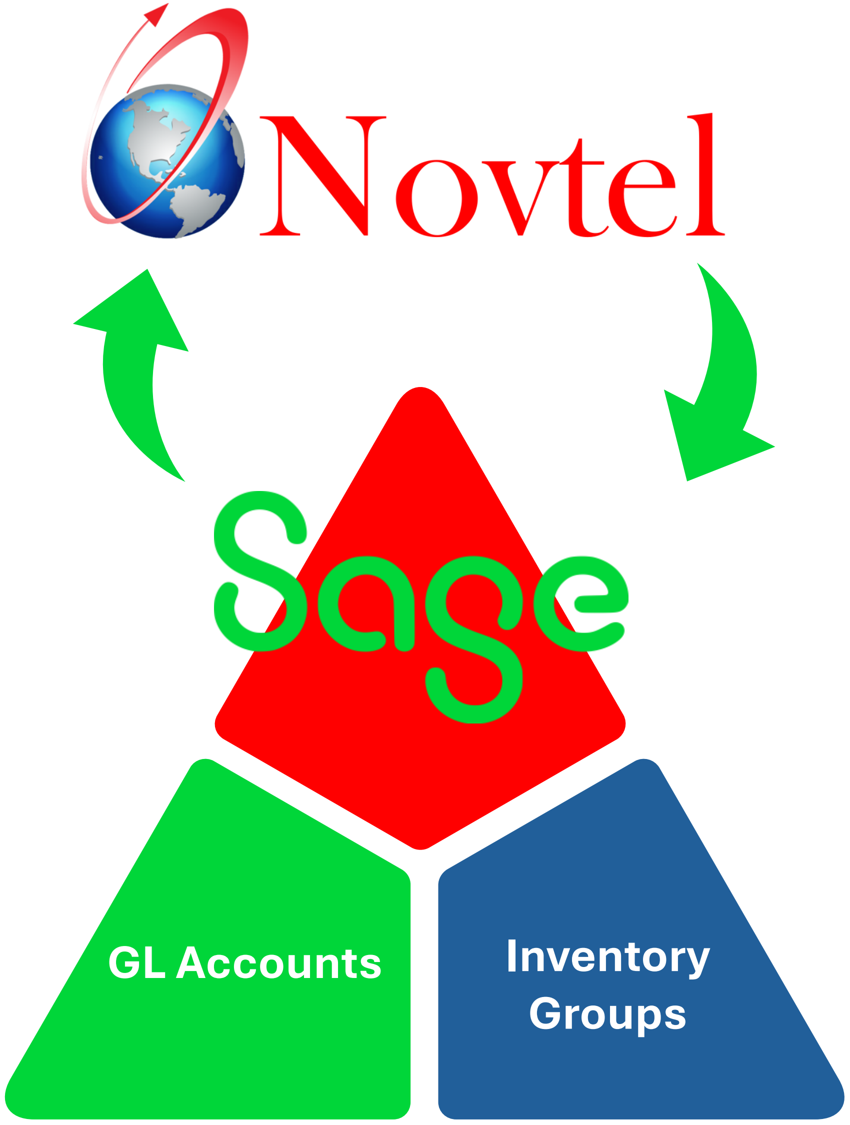
Novtel

# Procurement

# 1

# Introduction

# Introduction




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

As Customers, Suppliers and Products are created in Novtel, the master files will also be created in Pastel or Evolution.

Inventory Groups are set up in the linked financial system, and when a product is created in Novtel, it is imported to Sage and linked to the required inventory group for detailed financial reporting.

In turn, Inventory groups are linked to dedicated GL Accounts.

# Introduction


Novtel Procurement also integrates with Xero.

Bank Accounts and GL Accounts are set up in Xero and will be available for selection in Novtel.

Selling and Purchase GL Accounts are linked to Products, while selling GL Accounts are linked to Customers, and Purchase GL Accounts are linked to Suppliers.

# Introduction

**According to Investopedia.com, there are different types of Procurement, and the types include the following:**

- **Direct Procurement:**

  This kind of procurement involves any goods and services used during the production process.

  This includes raw materials, machinery, and other components.

- **Indirect Procurement:**

  Goods and services purchased under this type of procurement are used to meet the operational needs of a business. As such, they don't contribute to the company's revenues.

  This may include office equipment and supplies, furnishings, and marketing.

- **Goods Procurement:**

  Any physical products that businesses acquire through the procurement process to serve the company's needs.

  This can be direct, such as raw materials, or indirect, such as office supplies.

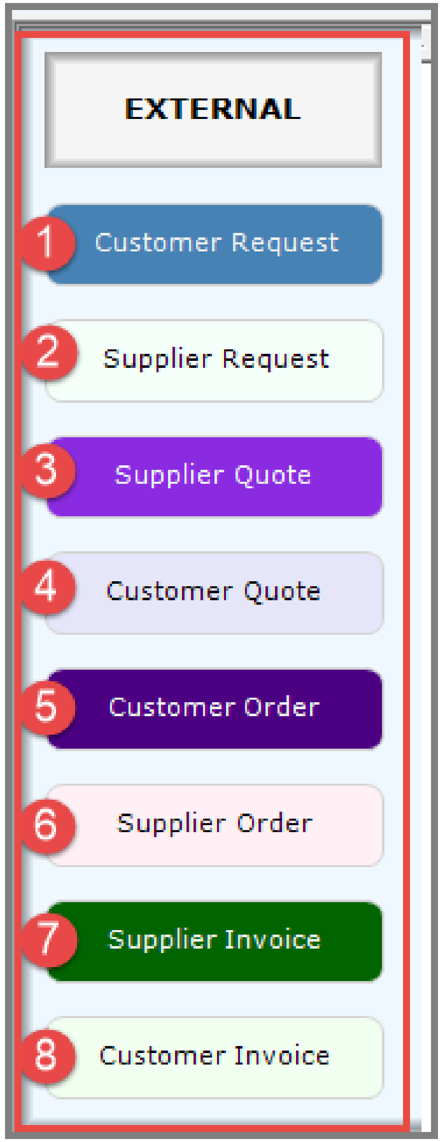
- **Services Procurement:**

  Like goods procurement, there are two types of services procurement: direct and indirect.

  Both rely on services provided by people.

  - Direct services procurement may refer to labor directly involved in the business.
  - Indirect services procurement can include things like on-site security to safeguard the premises.

# Introduction



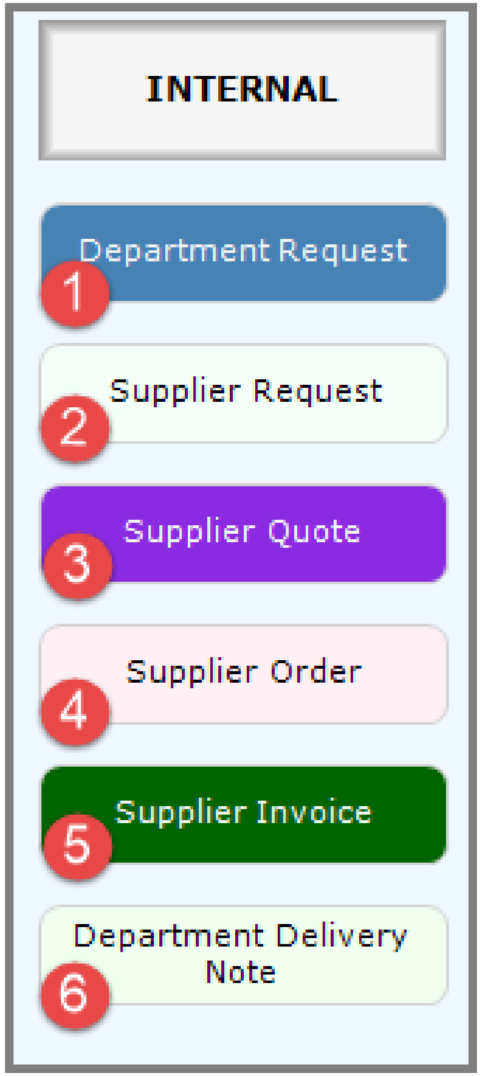

In Novtel, there are 2 process cycles which can be accessed, namely:

- **External Procurement (8 Steps)**

  With Novtel Procurement, your company can act as an Agency to source products from national and /or international Suppliers, and reselling the products to your Customers.

- **Internal Procurement (6 Steps)**

  This process will be applicable where your company source products for its own use. Products can be sourced for different Branches and / or Departments.

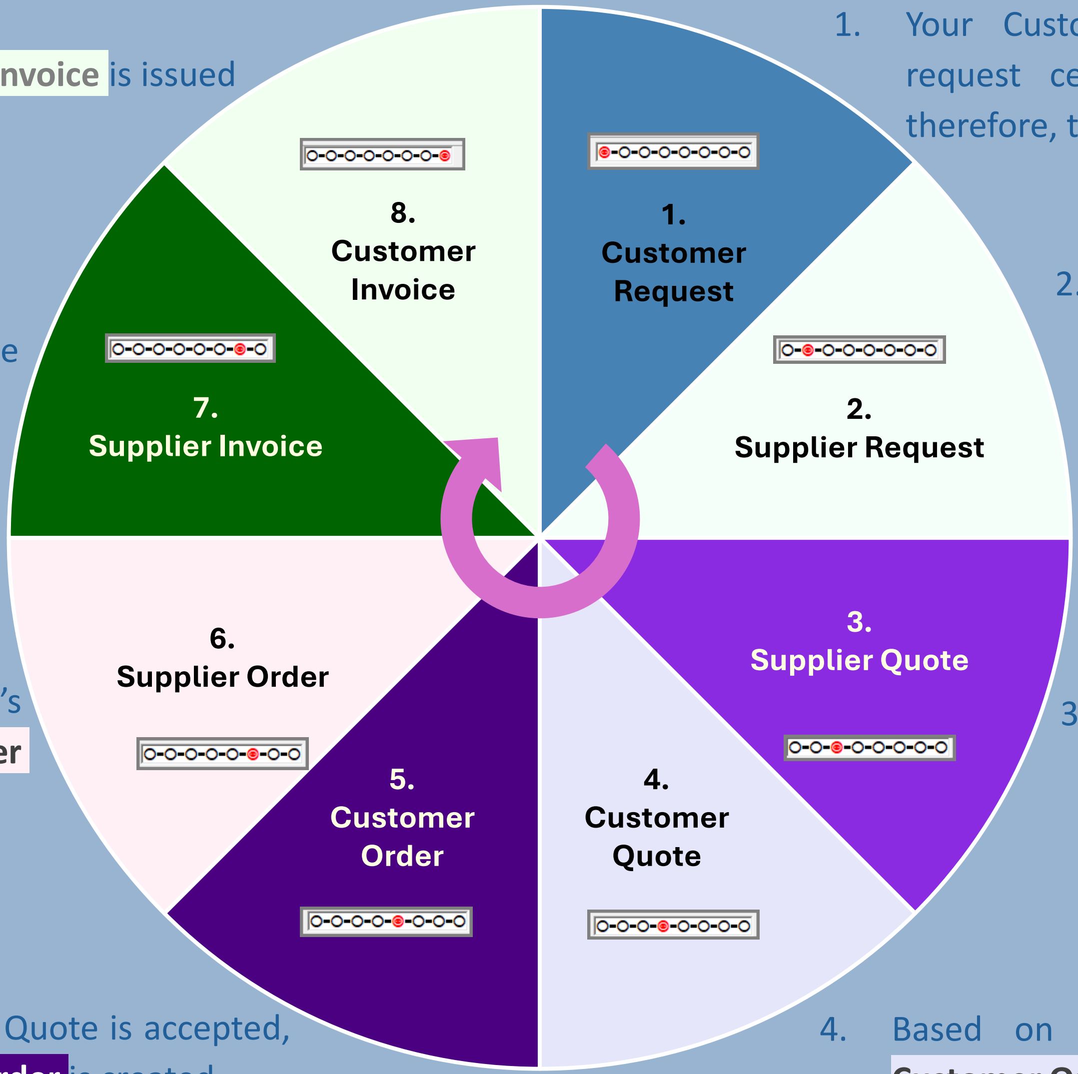


# Introduction

External

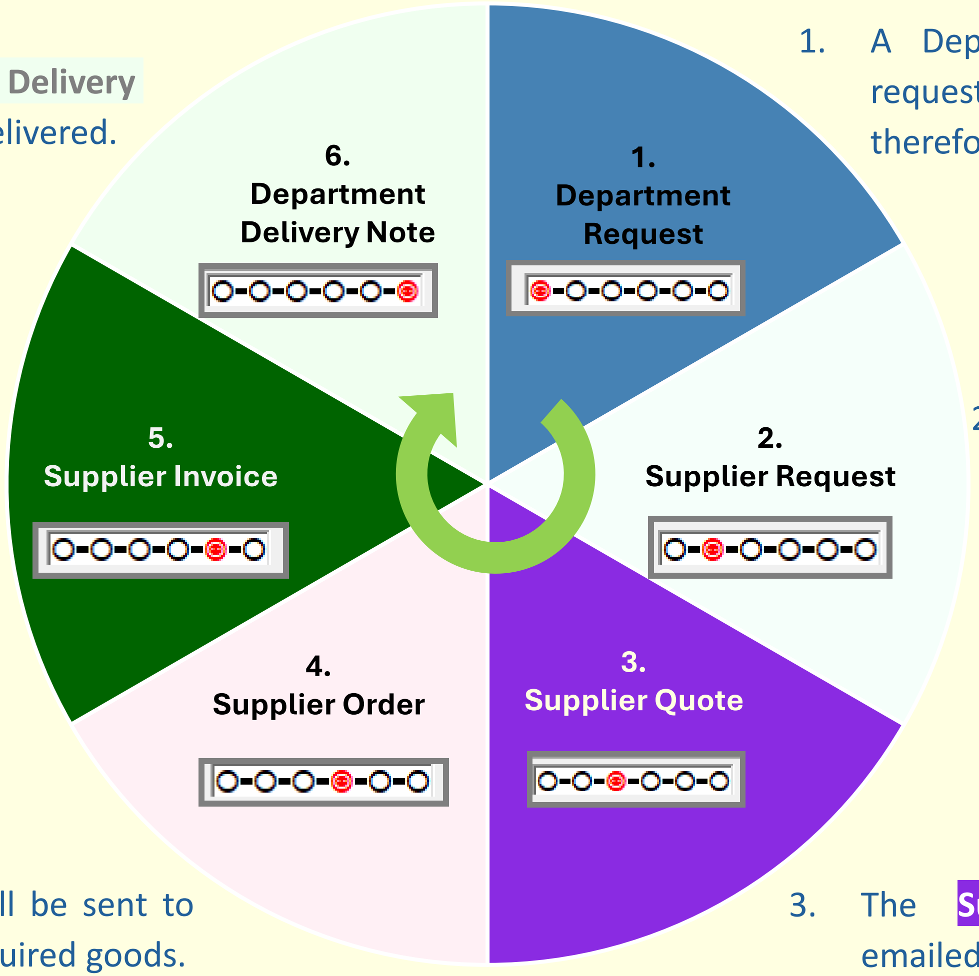
*The External Procurement Cycle is as follows until the process is completed:*

1. Your Customer or applicable Department 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.



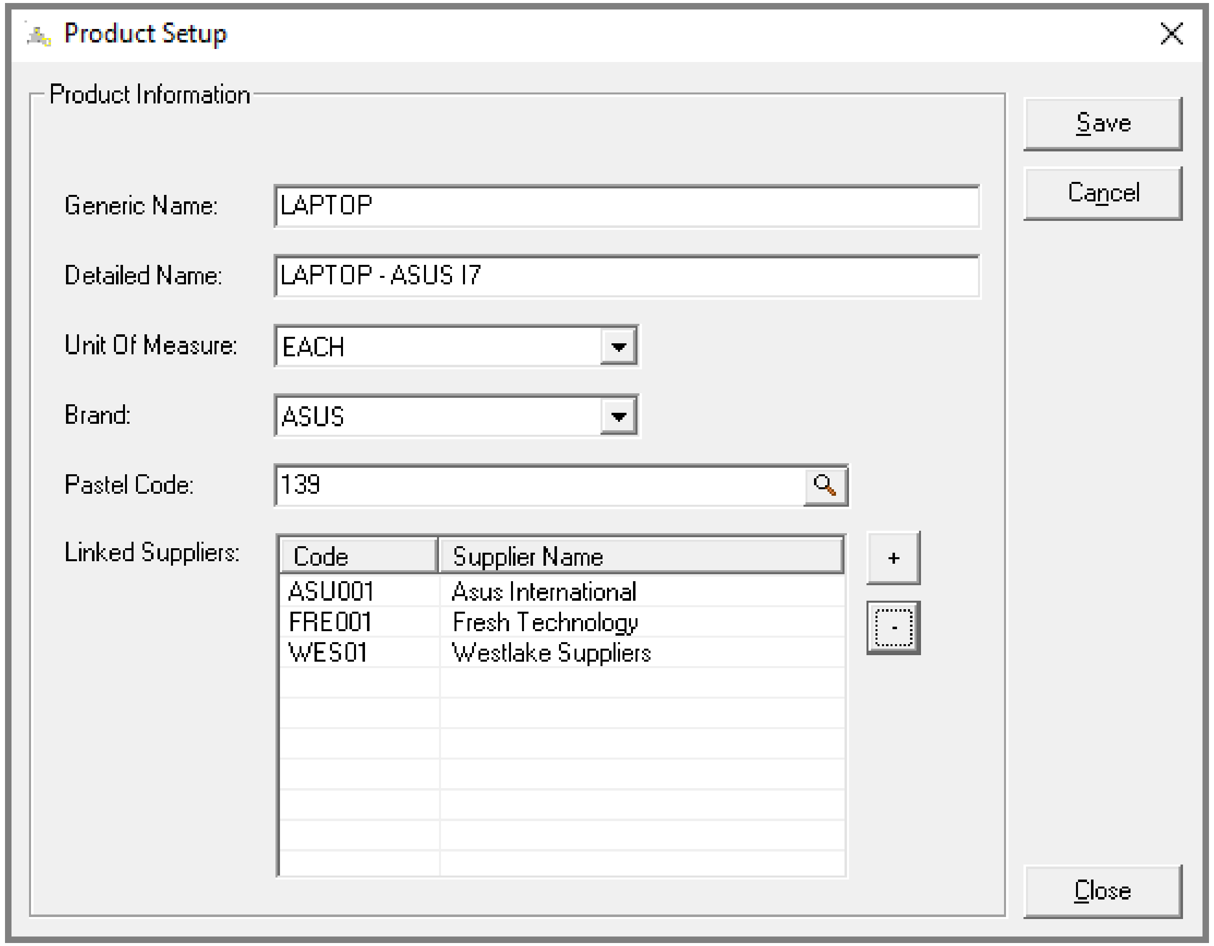

Novtel

# Internal Procurement




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.

# Introduction

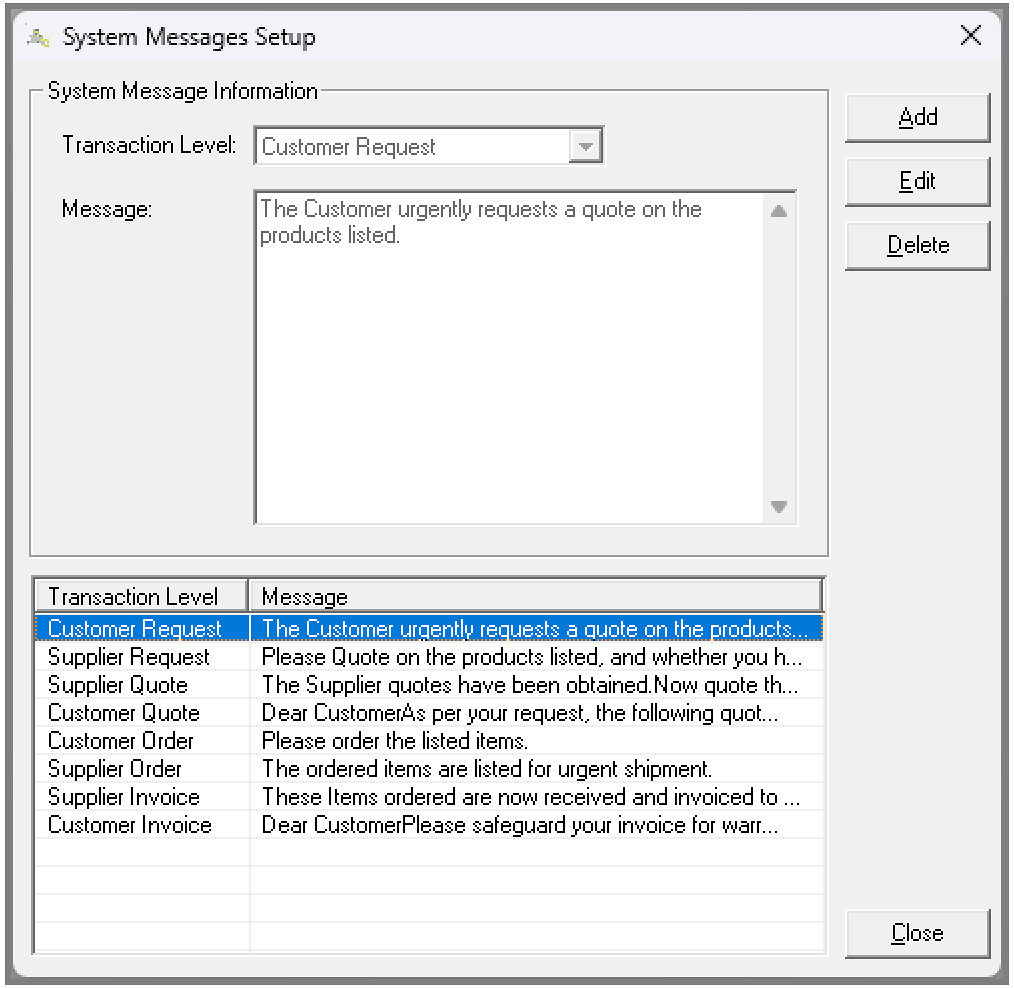



A Product can be linked to a specific ‘Brand’ and ‘Unit of Measure’.

All Suppliers carrying this Product, can be linked to it.

When a Supplier Request Transaction is created in Novtel, a request per Supplier linked here, can be produced and emailed.

# Introduction




System Messages can be set up per Transaction Level, and the message will automatically be captured to the transaction and document.

The message can be altered when needed while processing a transaction level, and it will then be displayed accordingly on the Customer / Supplier document.

Novtel

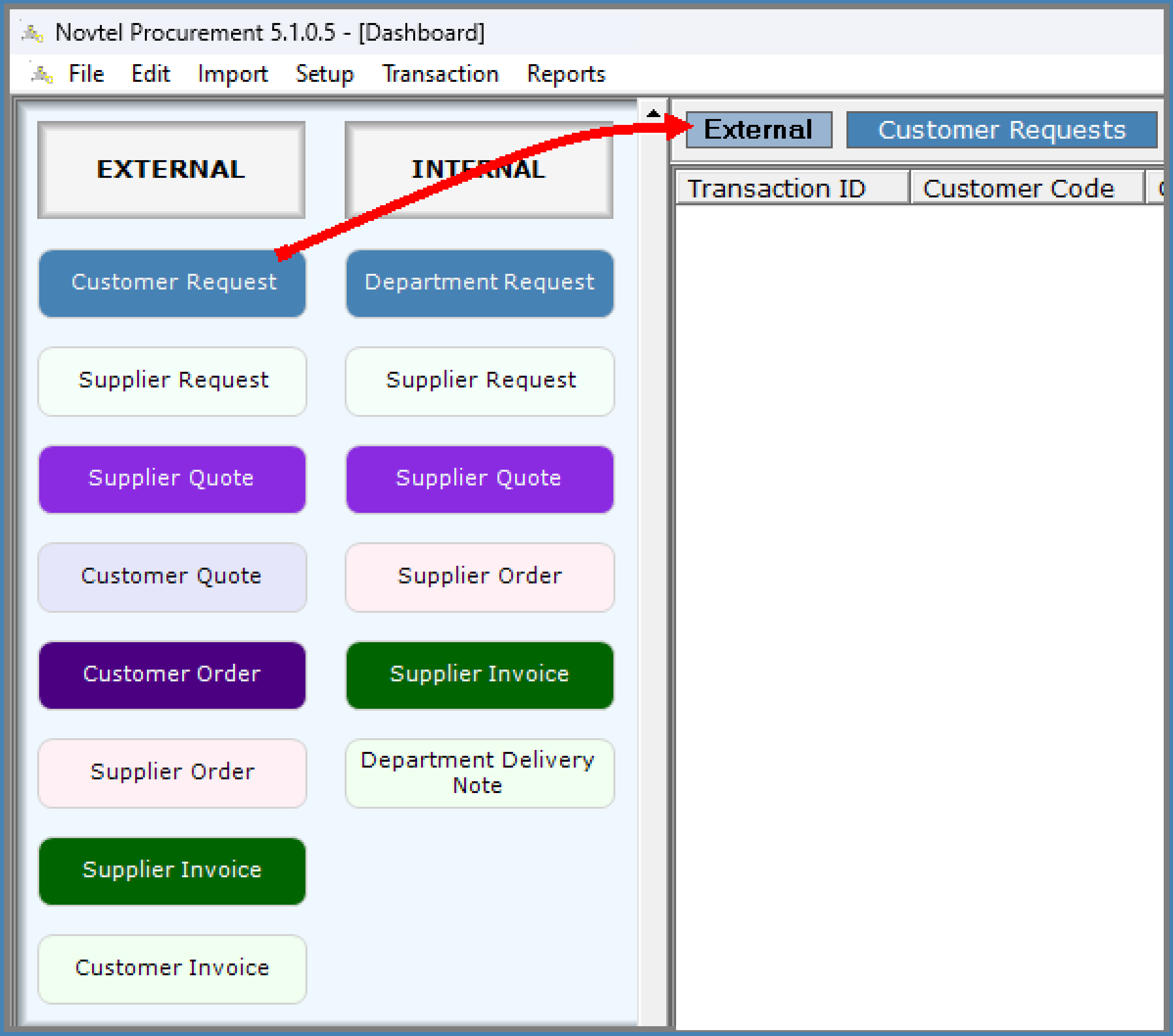
# Procurement

## 2

# The External Procurement Process

# External Procurement

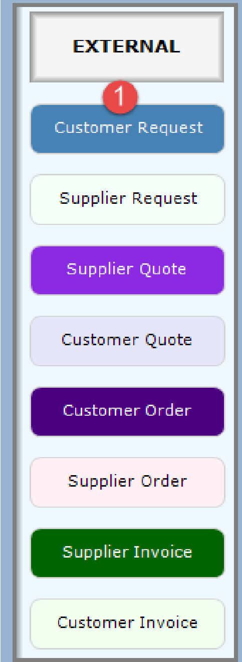
## Transaction Level 1 – Customer Request

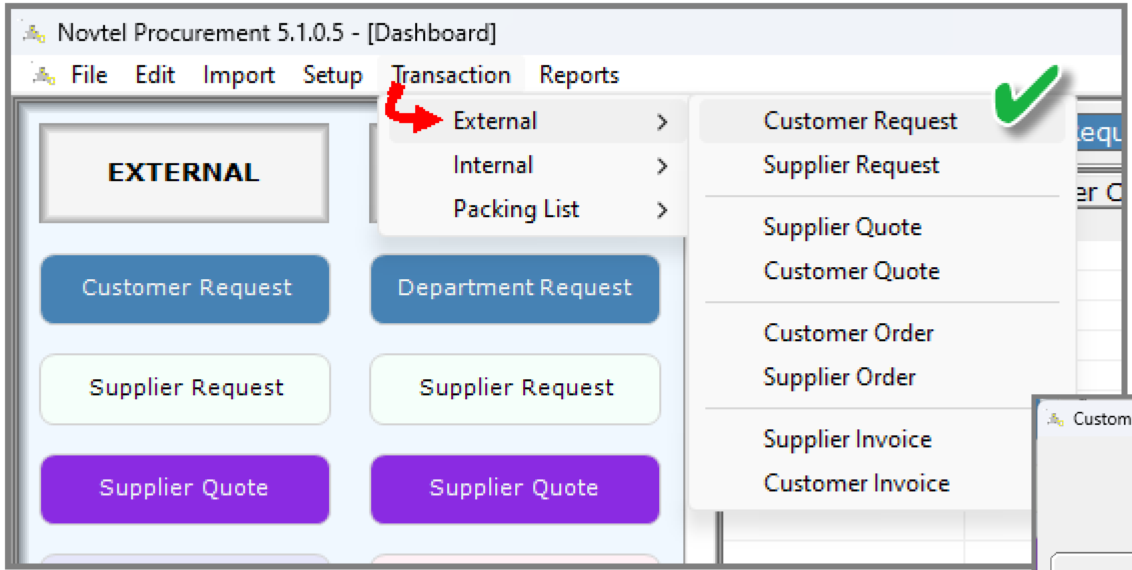


# External Process Step 1

External | Customer Requests

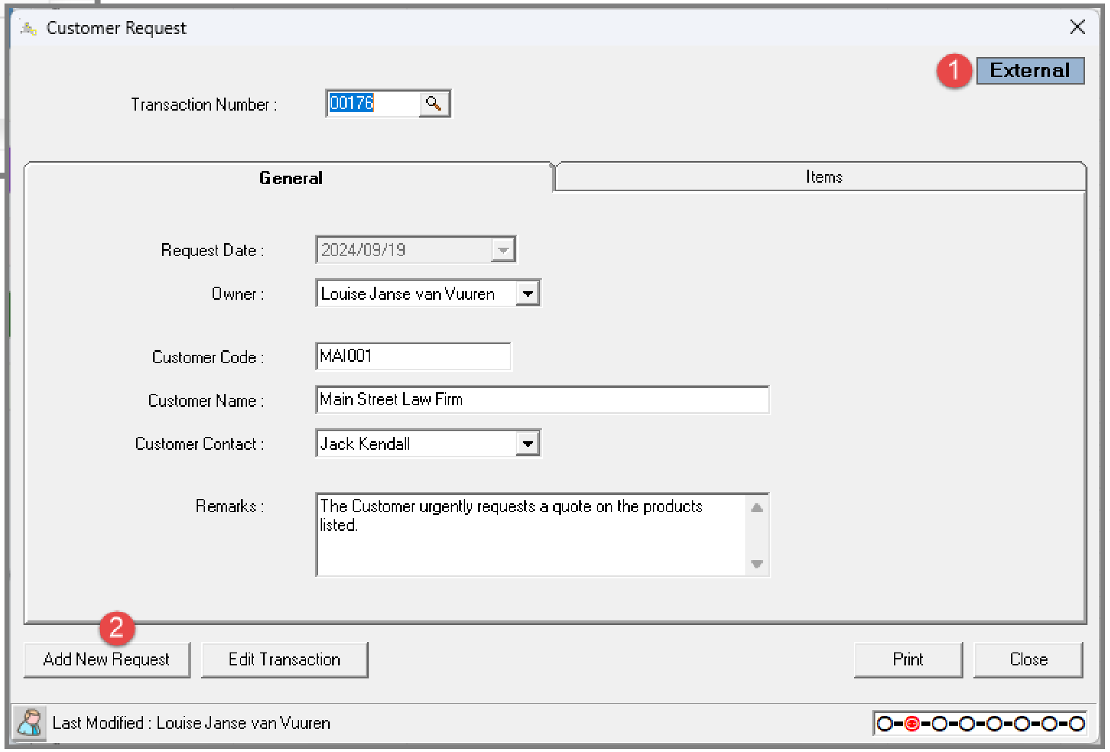
## Creating the Customer Request




In Novtel, the 'Transaction - External – Customer Request' option is selected.

1. At the top of the window, Novtel displays that this is an External Procurement Process.
2. To create the request, the 'Add New Request' button is clicked.



# External Process Step 1

External | Customer Requests

## Creating the Customer Request

EXTERNAL

1 Customer Request

Supplier Request

Supplier Quote

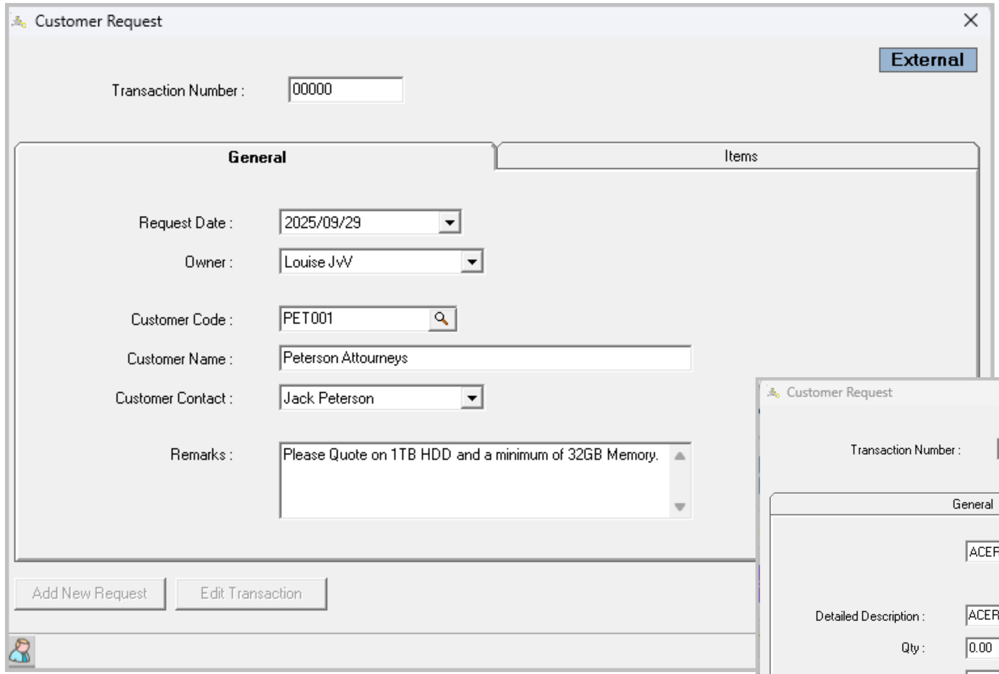
Customer Quote

Customer Order

Supplier Order

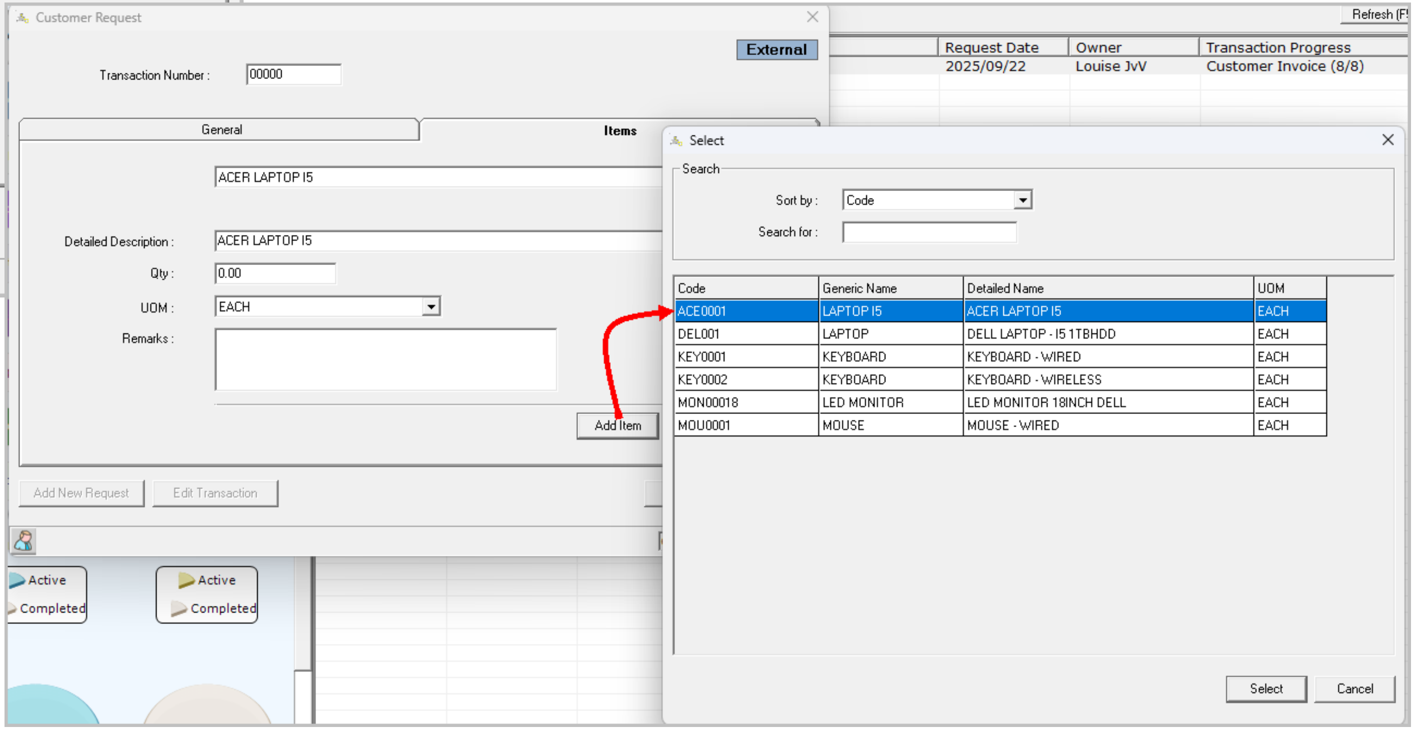
Supplier Invoice

Customer Invoice




A pre-created Customer can now be linked to this request and remarks – specific to this Customer's request – can be captured.

Pre-created Products can now be added and the Quantity; Unit of Measure and Remarks inserted for each before saving the Customer Request.




Novtel Sage xero

# External Process Step 1

External | Customer Requests

EXTERNAL

1 Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

Customer Invoice

## Creating the Customer Request

**Type :** EXTERNAL **Transaction :** 3

### Tech Supplies

Tel: 044 456123 Fax:
E-mail: tech@supplies.com

**CUSTOMER REQUEST**

**Page :** 1 / 1

**Customer :** Peterson Attourneys

**Contact Person :** Jack Peterson
**Tel :** 044 652365
**Fax :**
**Email :** jack@pertson.com

**Request Date :** 2025/09/29

**Sent By :** Louise JvV

**Remarks :** Please Quote on 1TB HDD and a minimum of 32GB Memory.

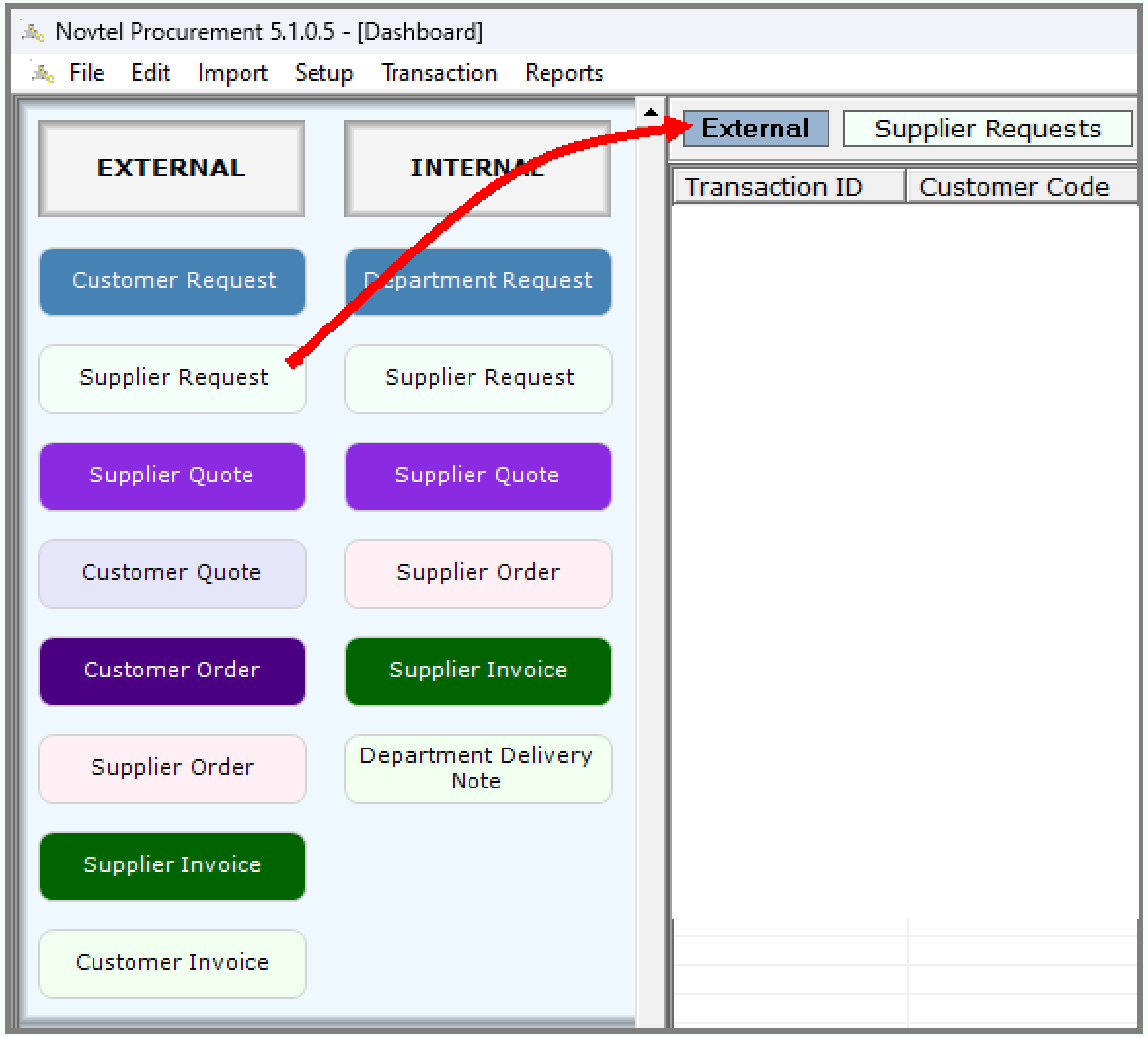
| Line | Product | UOM | Qty |
|---|---|---|---|
| 0002 | ACER LAPTOP I5 | EACH | 7.00 |
| 0003 | KEYBOARD - WIRELESS | EACH | 7.00 |
| 0004 | MOUSE - WIRED | EACH | 7.00 |

The Customer Request will be displayed as follows, and can now be sent to the Supplier to request a Quotation.

Novtel Sage xero

# External Procurement

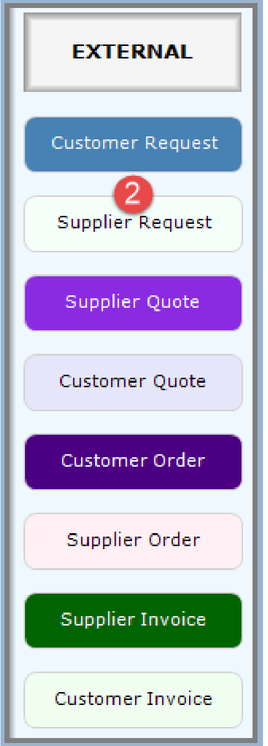
## Transaction Level 2 – Supplier Request

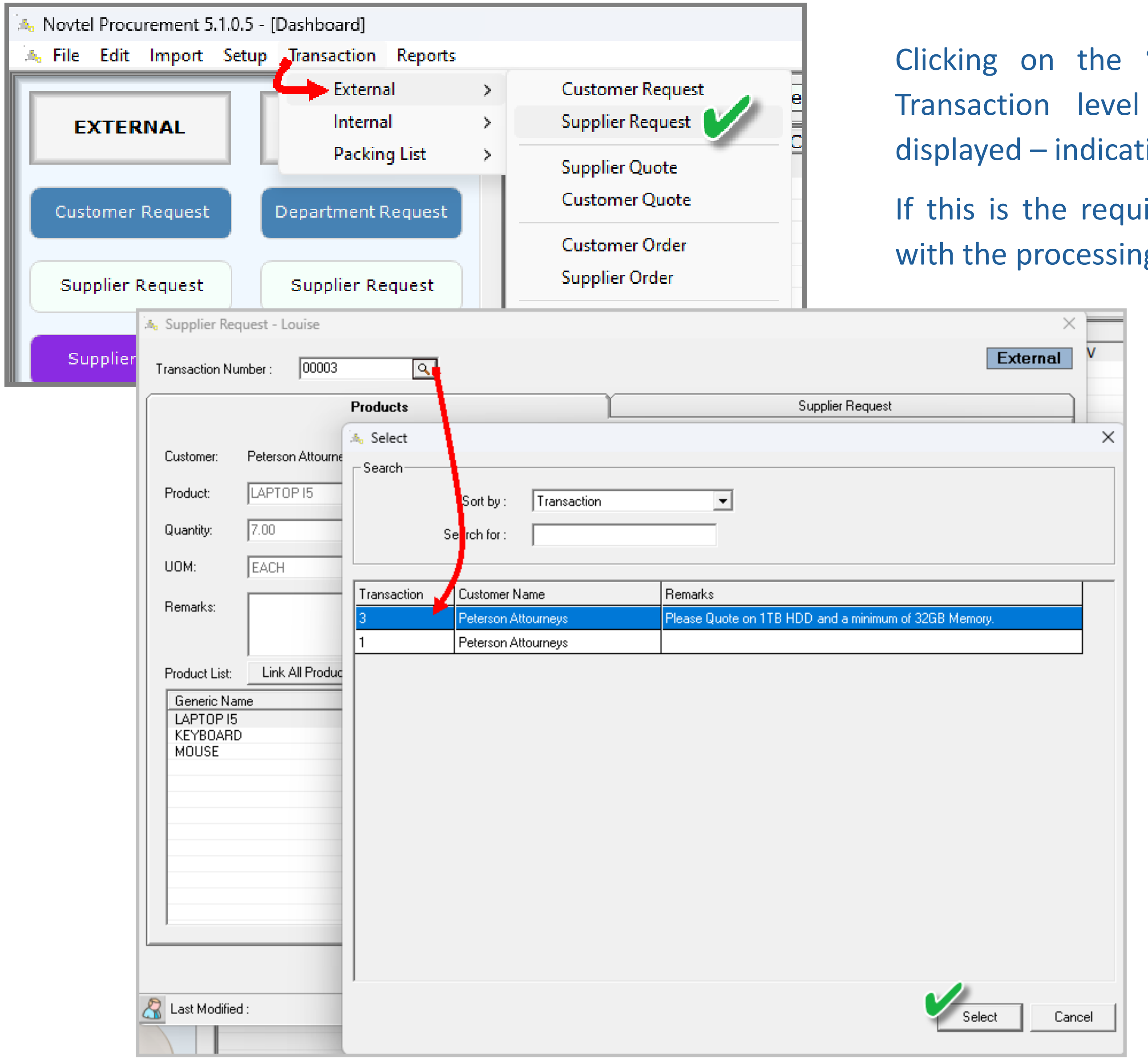


# External Process Step 2

External | Supplier Requests

## Producing a Supplier Request



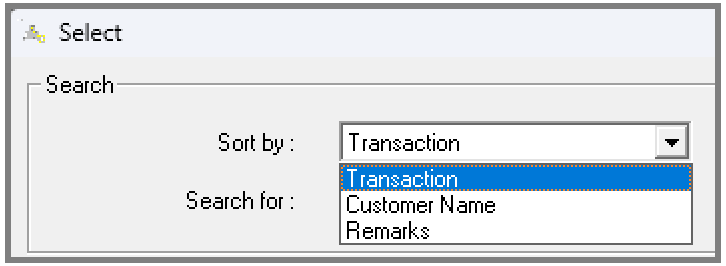

Clicking on the 'Transaction – External - Supplier Request' Transaction level option, the 'Supplier Request' screen is displayed – indicating the latest Transaction number at the top.

If this is the required transaction, the User can simply proceed with the processing.

However: If a different Transaction Number is to be accessed, click on the search button in the 'Transaction Number' field; search for and select the required transaction.

A specific transaction can be searched for by means of the following criteria:

- Transaction Number
- Customer Name
- Or Remarks



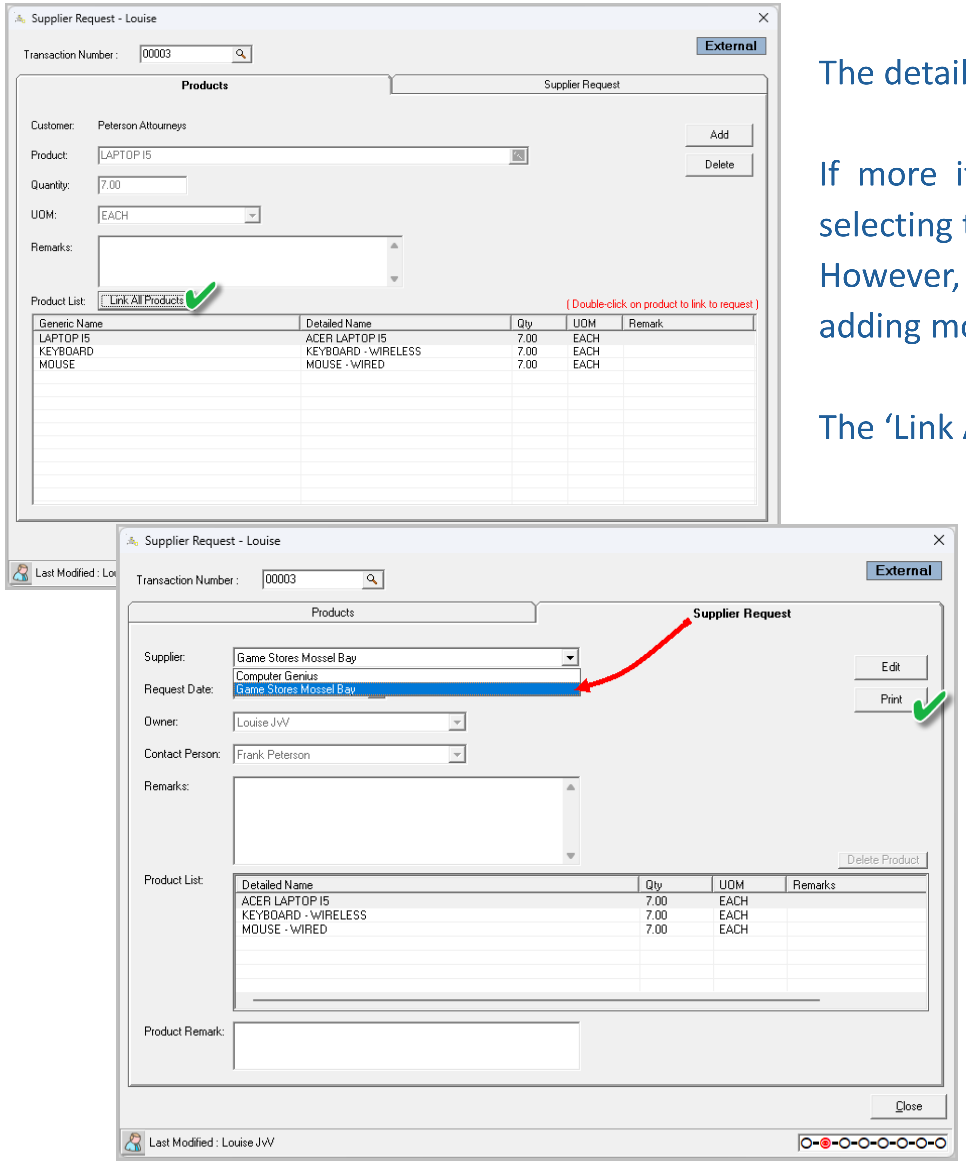
# External Process Step 2

External | Supplier Requests

# Producing a Supplier Request

**EXTERNAL**

- Customer Request
- 2 Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- Customer Invoice




The details linked to the Customer Request are now displayed.

If more items are required, it can be added by clicking on the 'Add' button and selecting the required products individually.
However, we will create the Supplier Request based on the Customer Request without adding more products.

The 'Link All Products' button will link the products to the Suppliers applicable to them.

If more than 1 Supplier carry the required products, a request per Supplier can be produced and sent to the Suppliers as an attachment from your email program.

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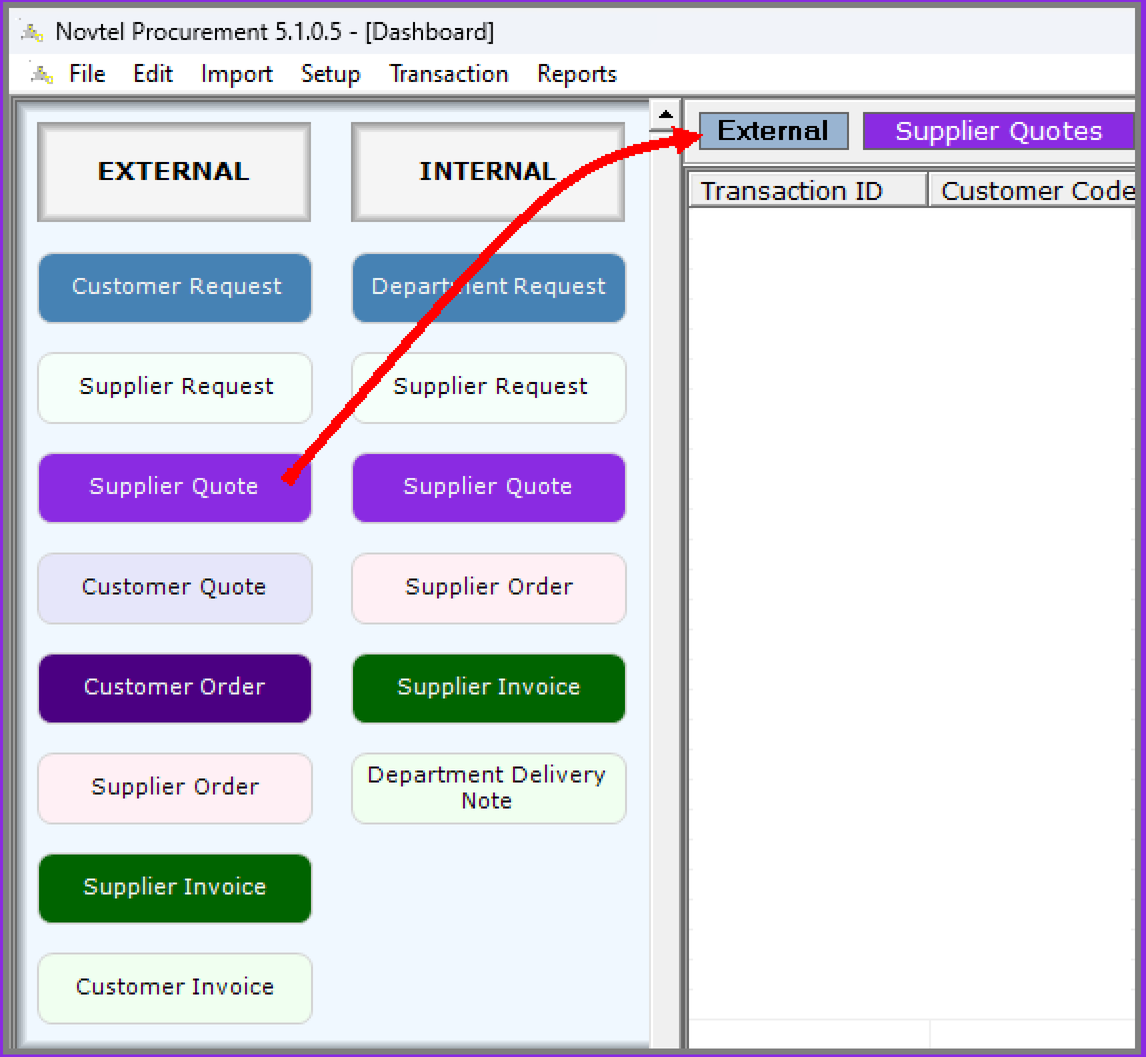
# External Procurement

## Transaction Level 3 – Supplier Quote



External | Supplier Quotes

# Capturing the Supplier Quotes

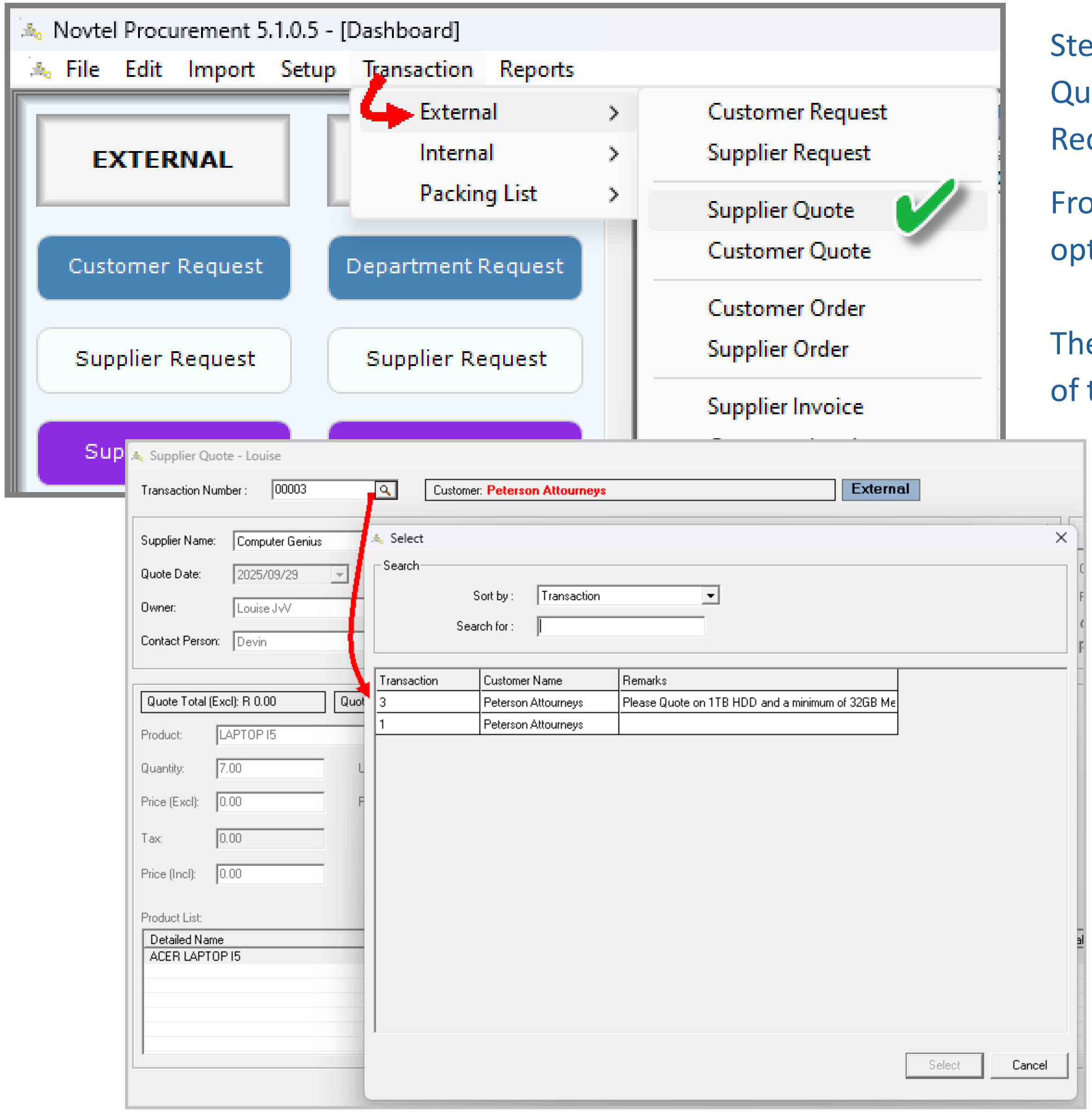
## External Process Step 3

EXTERNAL
- Customer Request
- Supplier Request
- 3 Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- Customer Invoice

Step 3 in the External Procurement process entails that the Quotes received from the Suppliers to which the Supplier Requests were sent, must be captured.

From the ‘Transaction’ menu, the ‘External - Supplier Quote’ option is selected.

The Transaction Number and Customer displayed at the top of the screen, is from the latest transaction created.




The search button gives access to the screen listing all transactions for which a Supplier Request has been created.

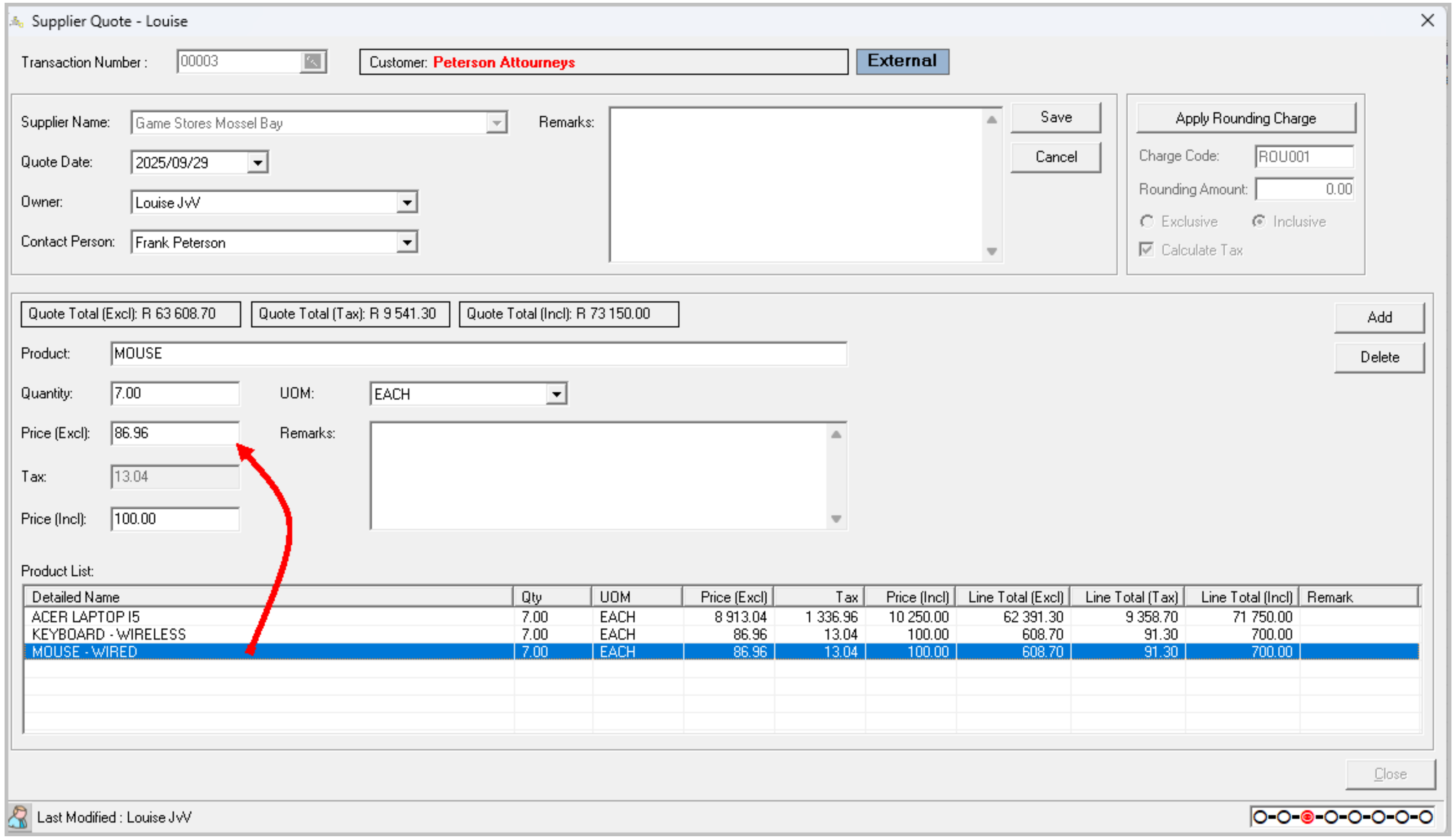
If the required transaction is different than the one currently displayed, the required transaction can now be searched for and selected.

Novtel Sage xero

# Capturing the Supplier Quotes

EXTERNAL

- Customer Request
- Supplier Request
- 3 Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- Customer Invoice

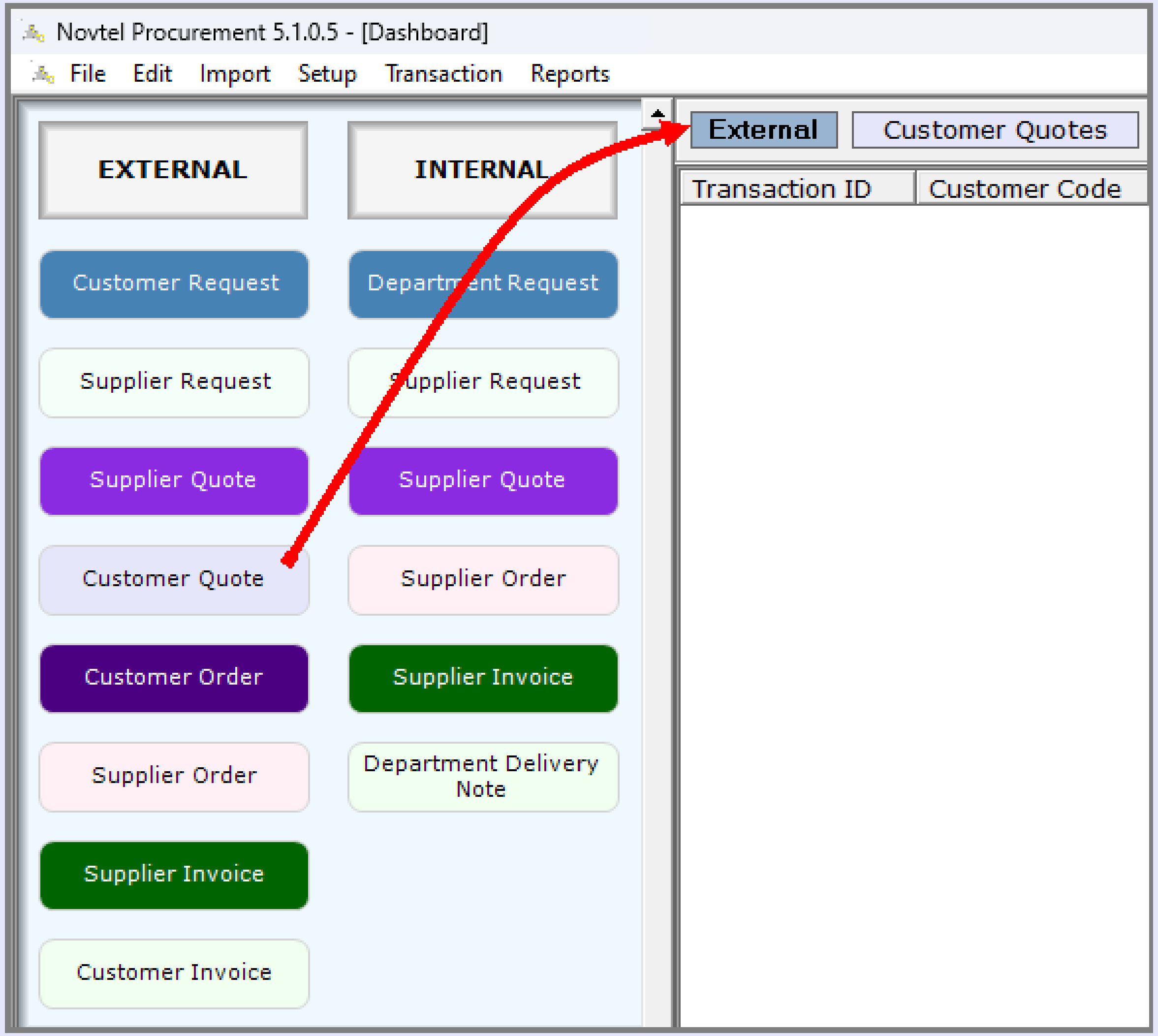



The Quoted price per product will be captured manually by the system user – as received from the Supplier.

The settings can now be saved and the document printed if required.

# External Procurement

## Transaction Level 4 – Customer Quote



# External Process Step 4

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

4

Customer Quote

Customer Order

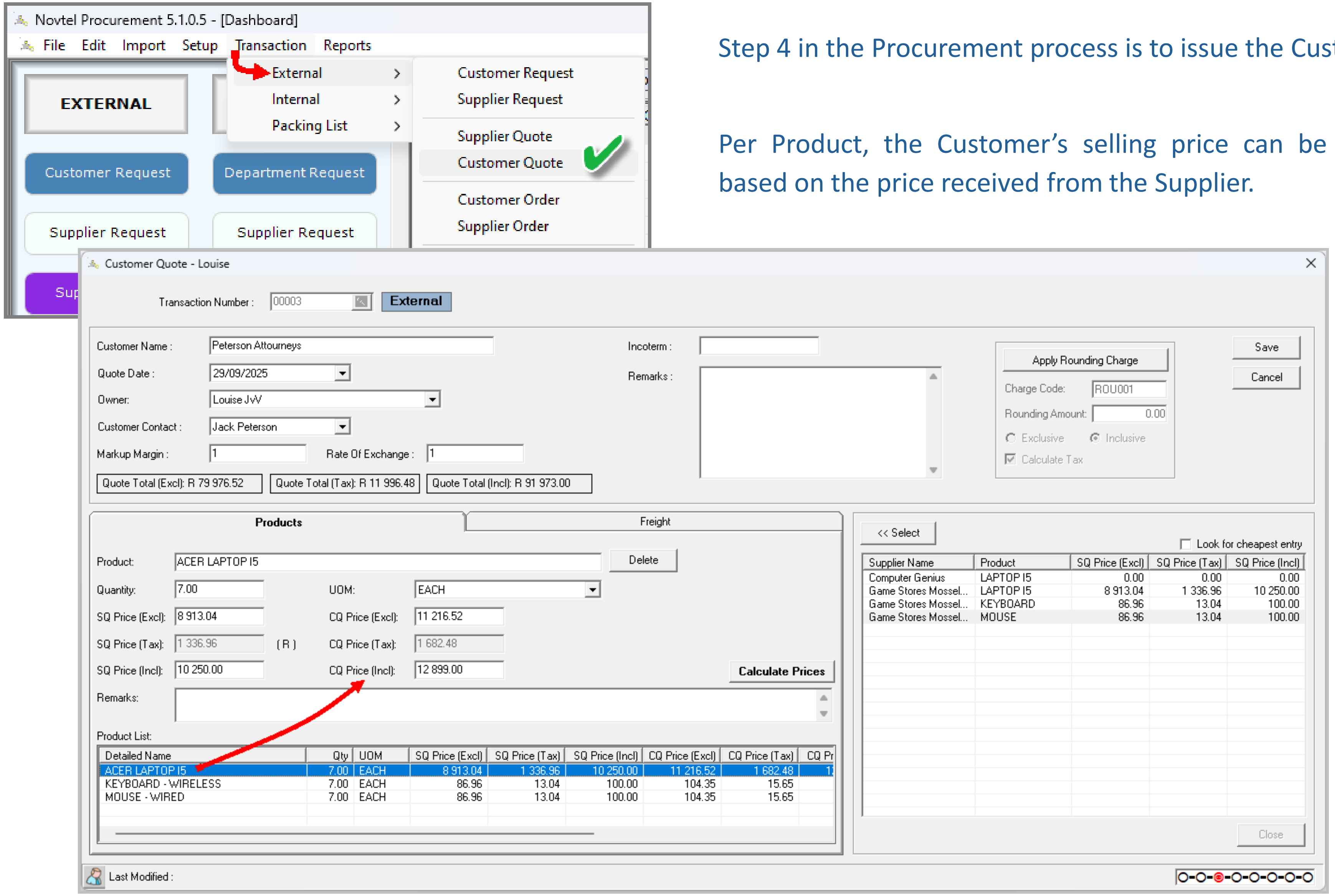
Supplier Order

Supplier Invoice

Customer Invoice

External | Customer Quotes

# Issuing the External Customer Quote




Step 4 in the Procurement process is to issue the Customer Quote

Per Product, the Customer's selling price can be captured – based on the price received from the Supplier.

# Issuing the External Customer Quote

## External Process Step 4

EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- 4 Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- Customer Invoice

Type : EXTERNAL | Transaction : 00003

**Tech Supplies**

Tel: 082 1478569 Fax:
E-mail: louise@novtel.com

**CUSTOMER QUOTE**

Page : 1 / 1

**Customer :** Peterson Attourneys
**Contact Person :** Jack Peterson
**Tel :** 044 652365
**Fax :**
**Email :** jack@pertson.com
**Quote Date :** 2025/09/29
**Sent By :** Louise JvV
**Remarks :**

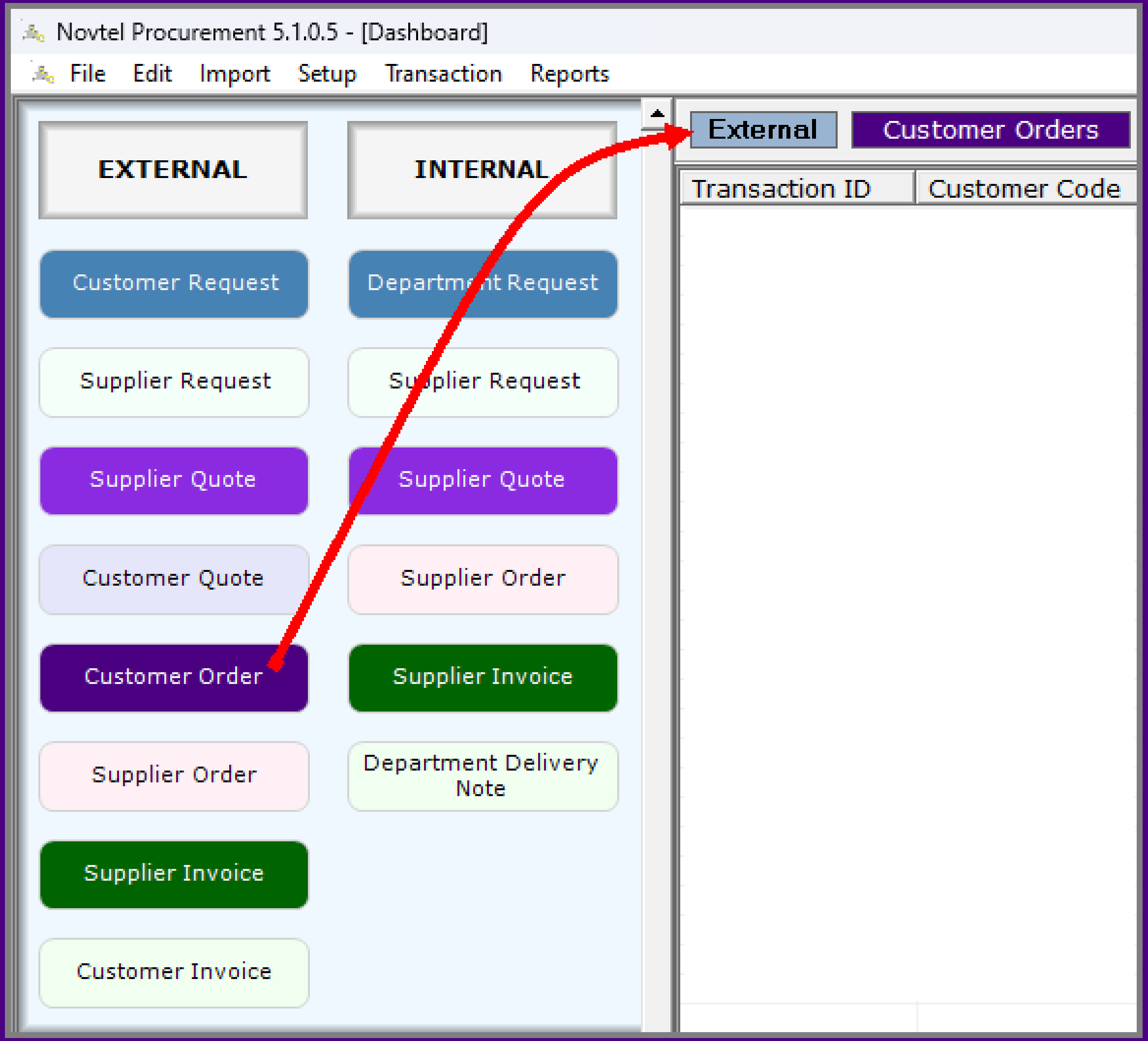
| Line | Product | Qty | UOM | Price (Excl) | Tax | Price (Incl) |
|---|---|---|---|---|---|---|
| 0002 | ACER LAPTOP I5 | 7.00 | EACH | 11 216.52 | 1 682.48 | 12 899.00 |
| | **Line Total:** | | | **78 515.65** | **11 777.35** | **90 293.00** |
| 0003 | KEYBOARD - WIRELESS | 7.00 | EACH | 104.35 | 15.65 | 120.00 |
| | **Line Total:** | | | **730.43** | **109.57** | **840.00** |
| 0004 | MOUSE - WIRED | 7.00 | EACH | 104.35 | 15.65 | 120.00 |
| | **Line Total:** | | | **730.43** | **109.57** | **840.00** |
| | **Quote Total:** | | | **R 79 976.52** | **R 11 996.48** | **R 91 973.00** |

After saving the Customer Quotation, and clicking the ‘Print’ button, the Quote can be exported to PDF format and emailed to the Customer as an attachment from your email program.

Novtel

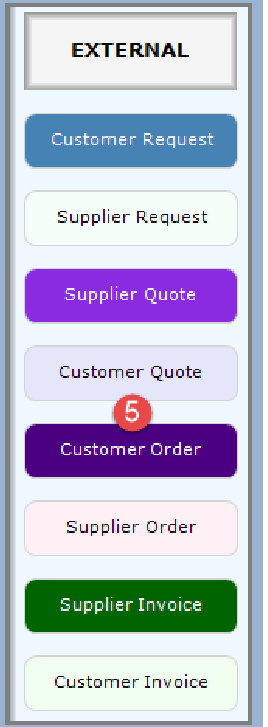
# External Procurement

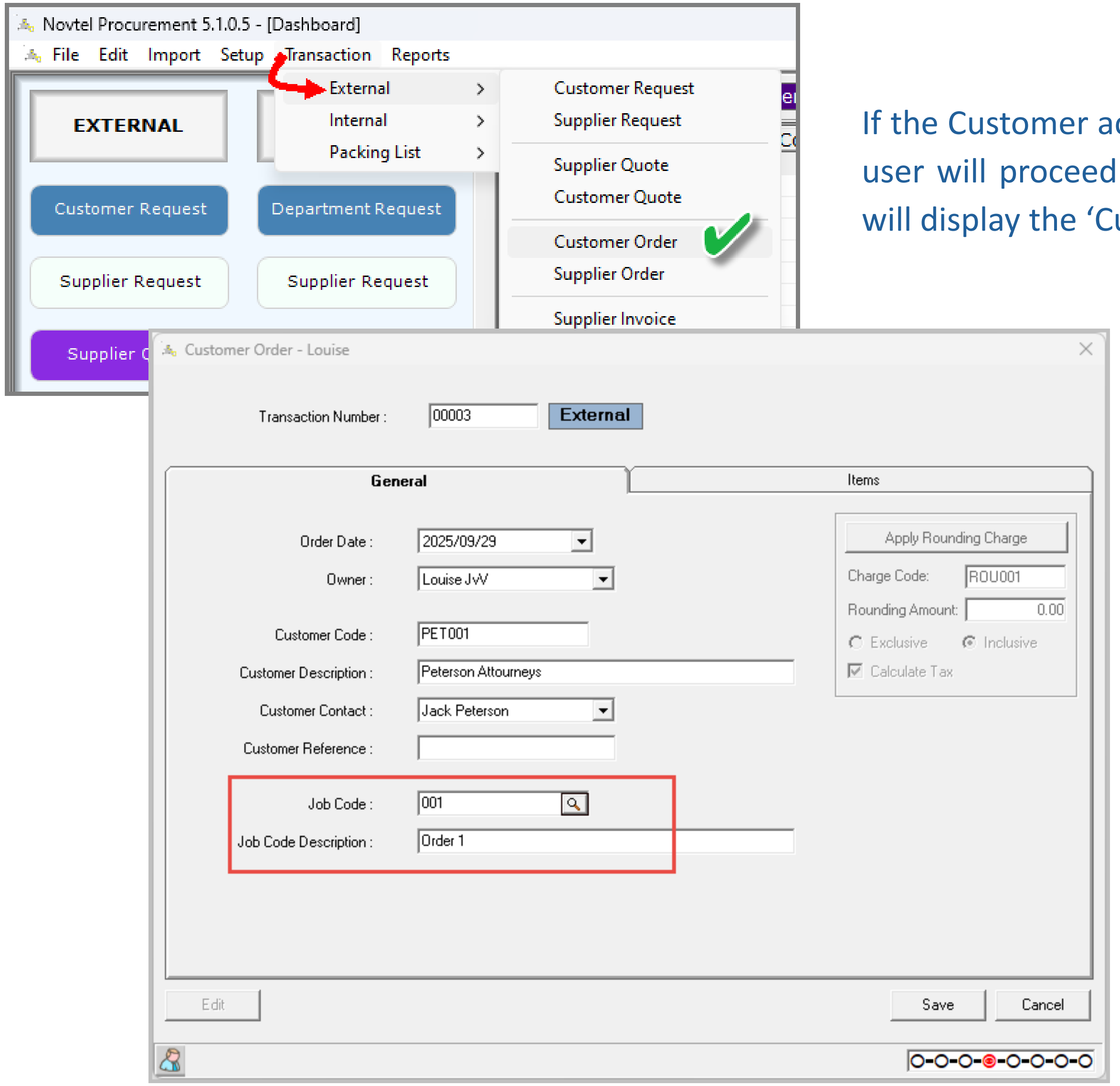
## Transaction Level 5 – Customer Order



# Creating the Customer Order

## External Process Step 5




If the Customer accepted the quote and has ordered the products as quoted, the user will proceed to click on ‘Transaction – External - Customer Order’ – which will display the ‘Customer Order’ window.

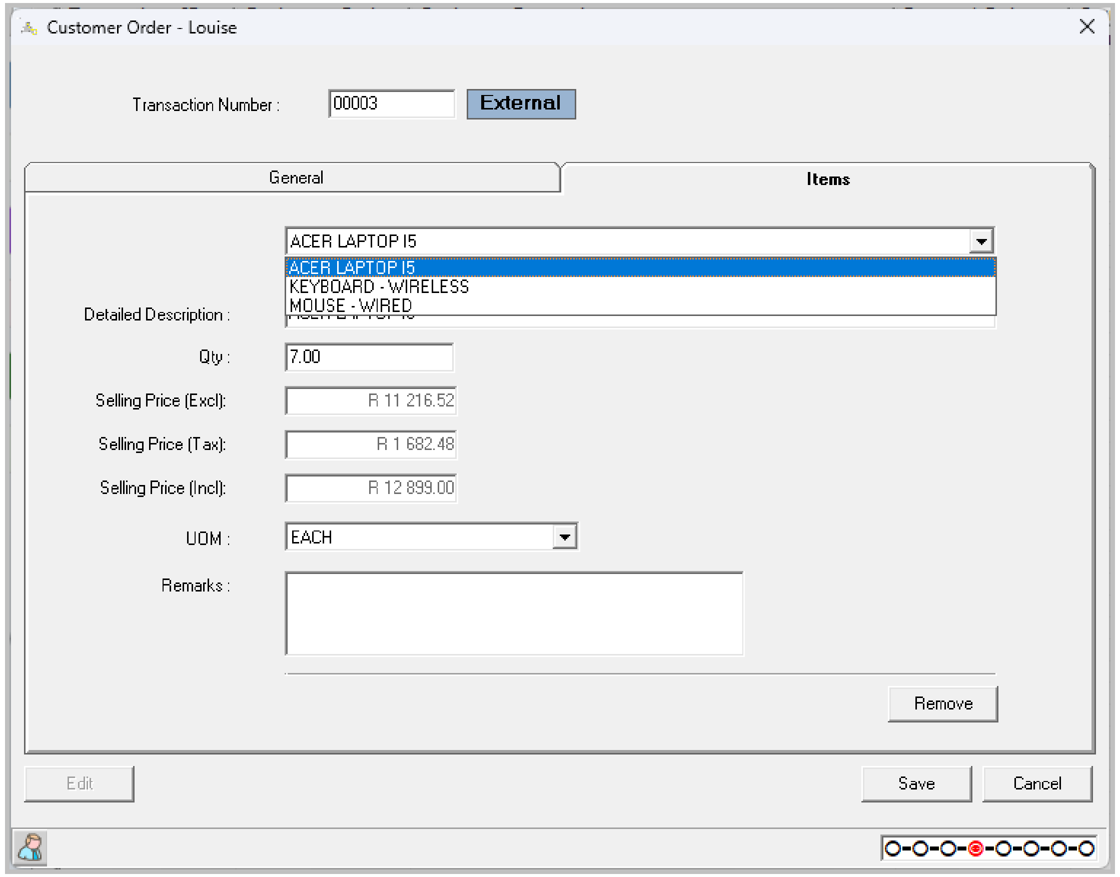
The pre-created Job Code for this order can now be searched for and selected.

# Creating the Customer Order

## External Process Step 5

EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- 5 Customer Order
- Supplier Order
- Supplier Invoice
- Customer Invoice




In the 'Items' tab, the physical Products – as linked to the Customer Quote – can be accessed.

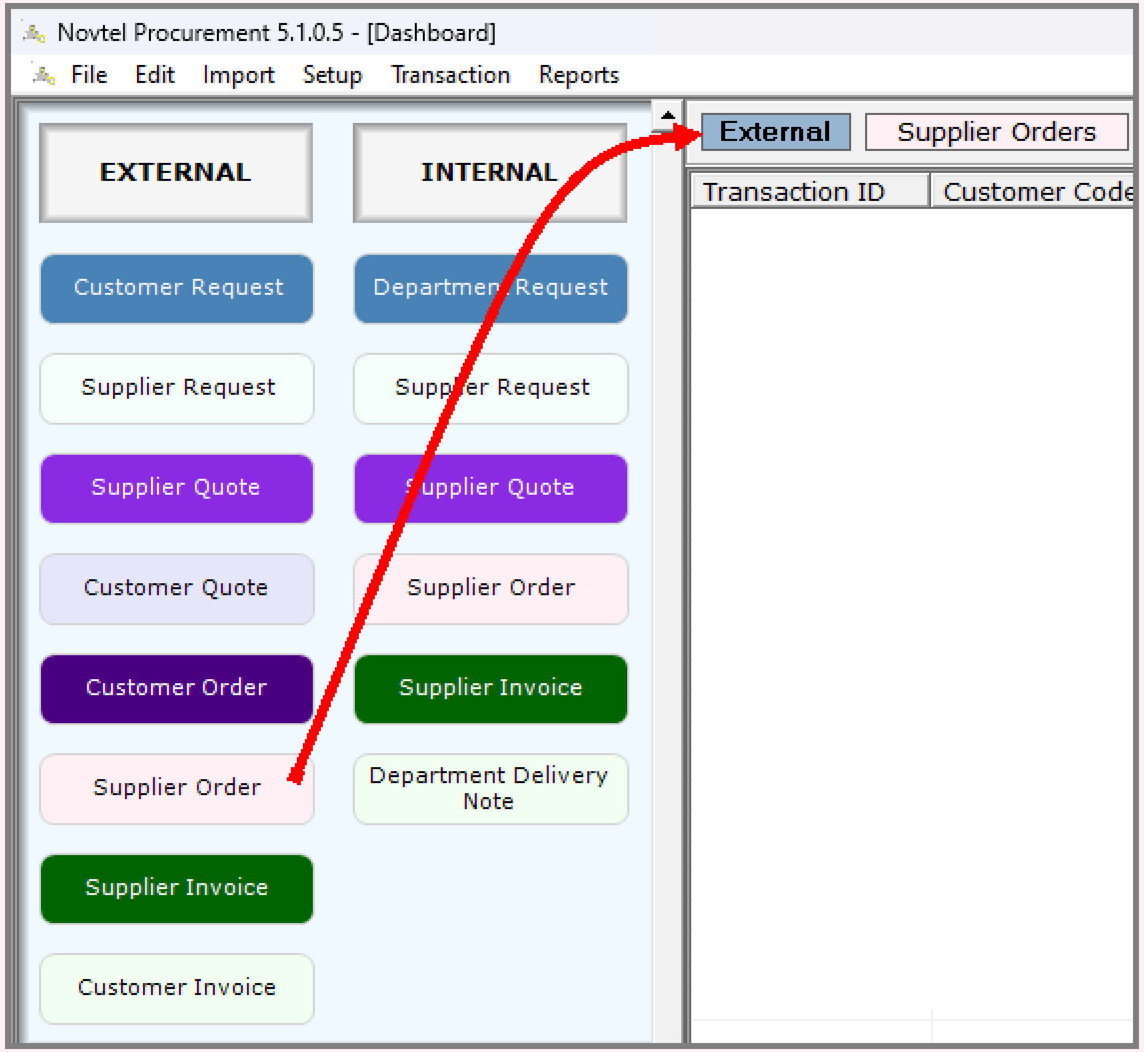
In this case, the 7 Laptops are indicated first, and the set selling Price is R 12 899.00 each.

Clicking on the dropdown arrow, the next product can be selected and viewed.

If all is in order, the Order can be saved and printed to PDF.

# External Procurement

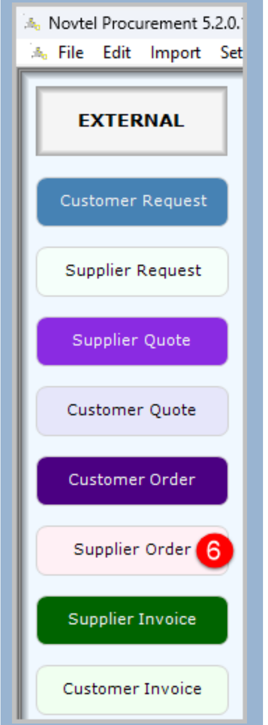
## Transaction Level 6 – Supplier Order

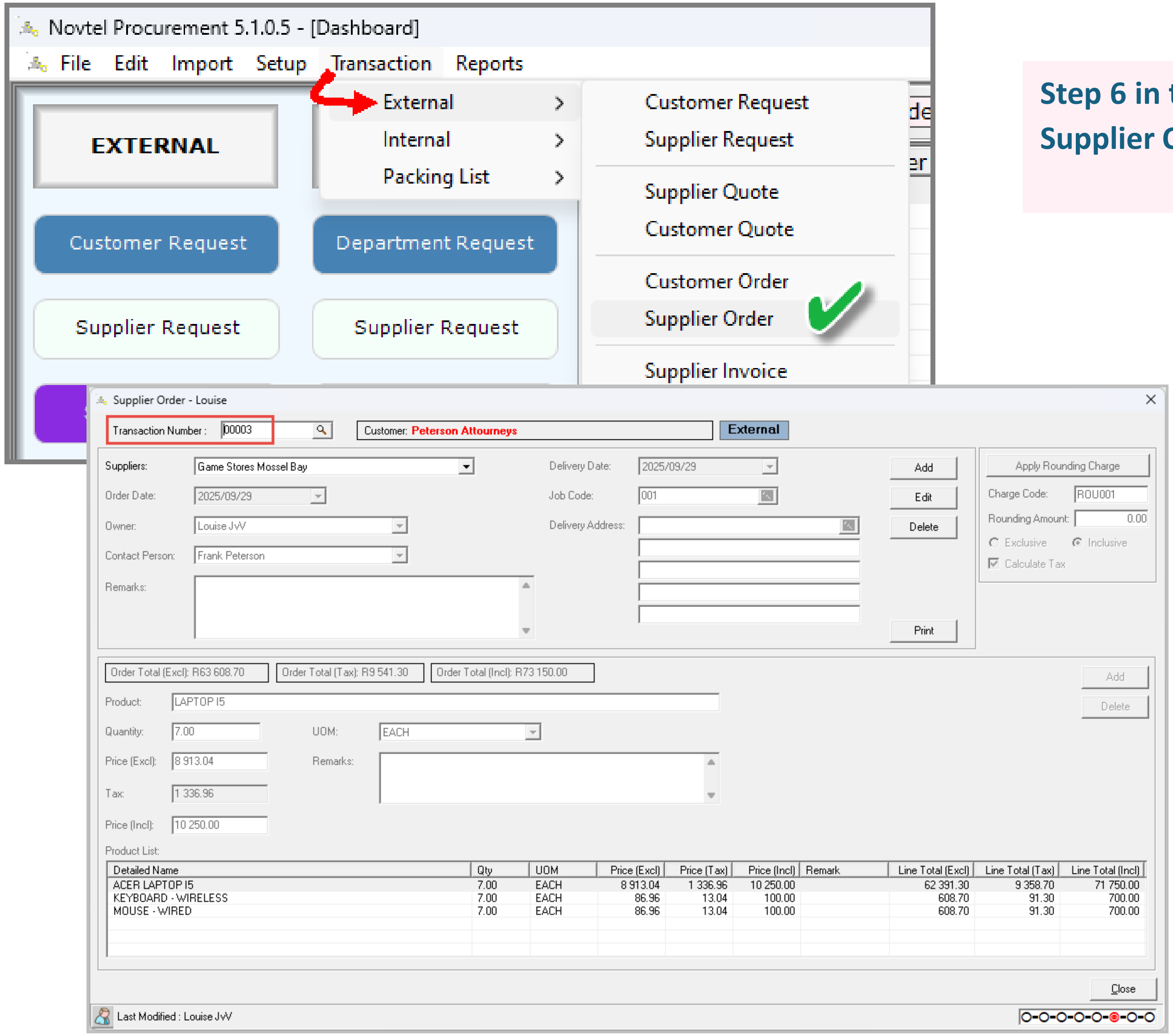


# External Process Step 6

External | Supplier Orders

## Producing the Supplier Order




**Step 6 in the External Procurement process is to create the Supplier Order based on the Customer Order produced.**

Clicking 'Transaction – External - Supplier Order', the Supplier Order screen is accessed.

By default, the latest transaction is displayed.

If a different transaction is to be accessed, the required transaction number is to be searched for and selected.

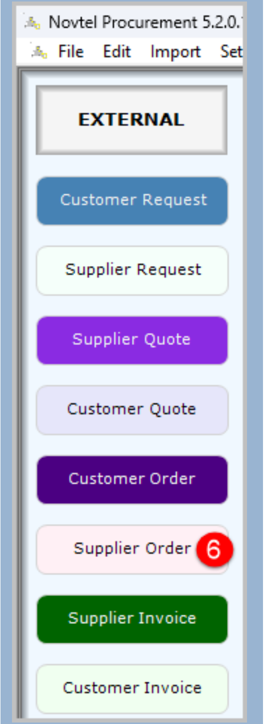
Novtel Sage xero

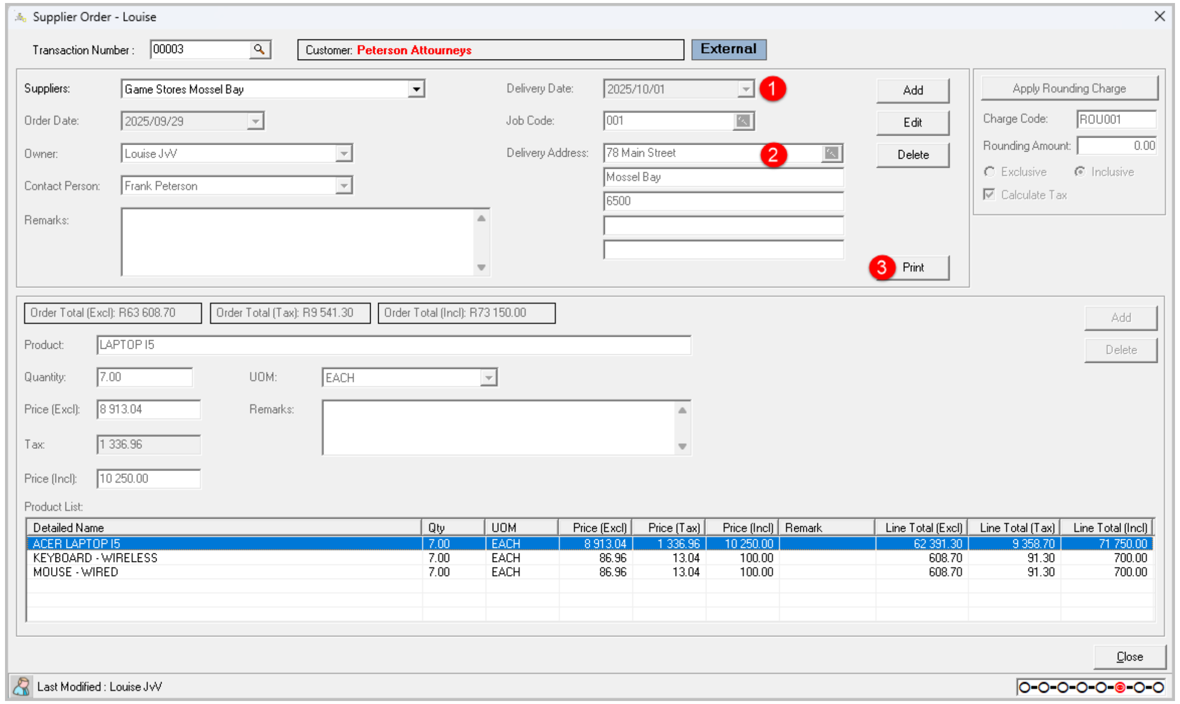
External | Supplier Orders

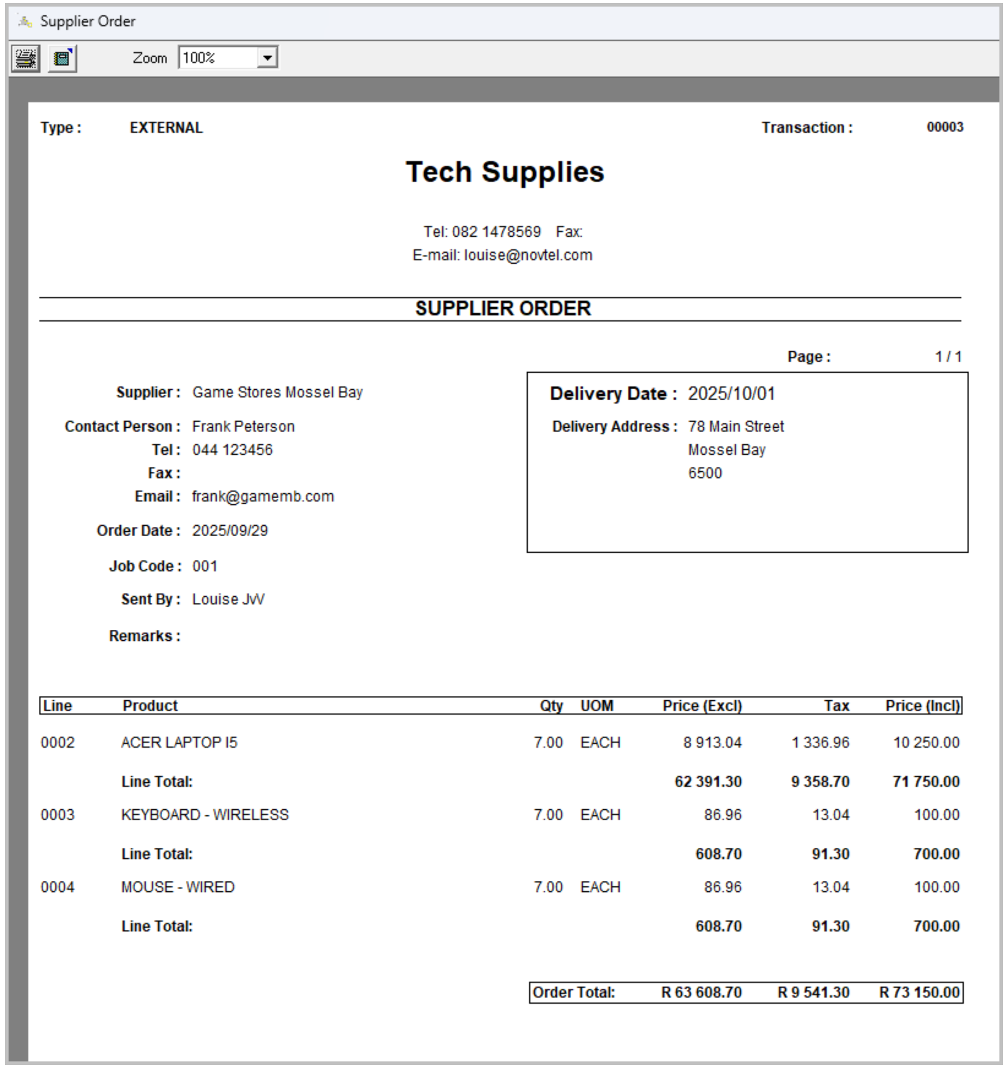
# Producing the Supplier Order

## External Process Step 6

1. The expected delivery date is selected in this field.
2. The Delivery Address is to be selected.
3. And the Supplier Order can be printed to PDF format and emailed to the Supplier.

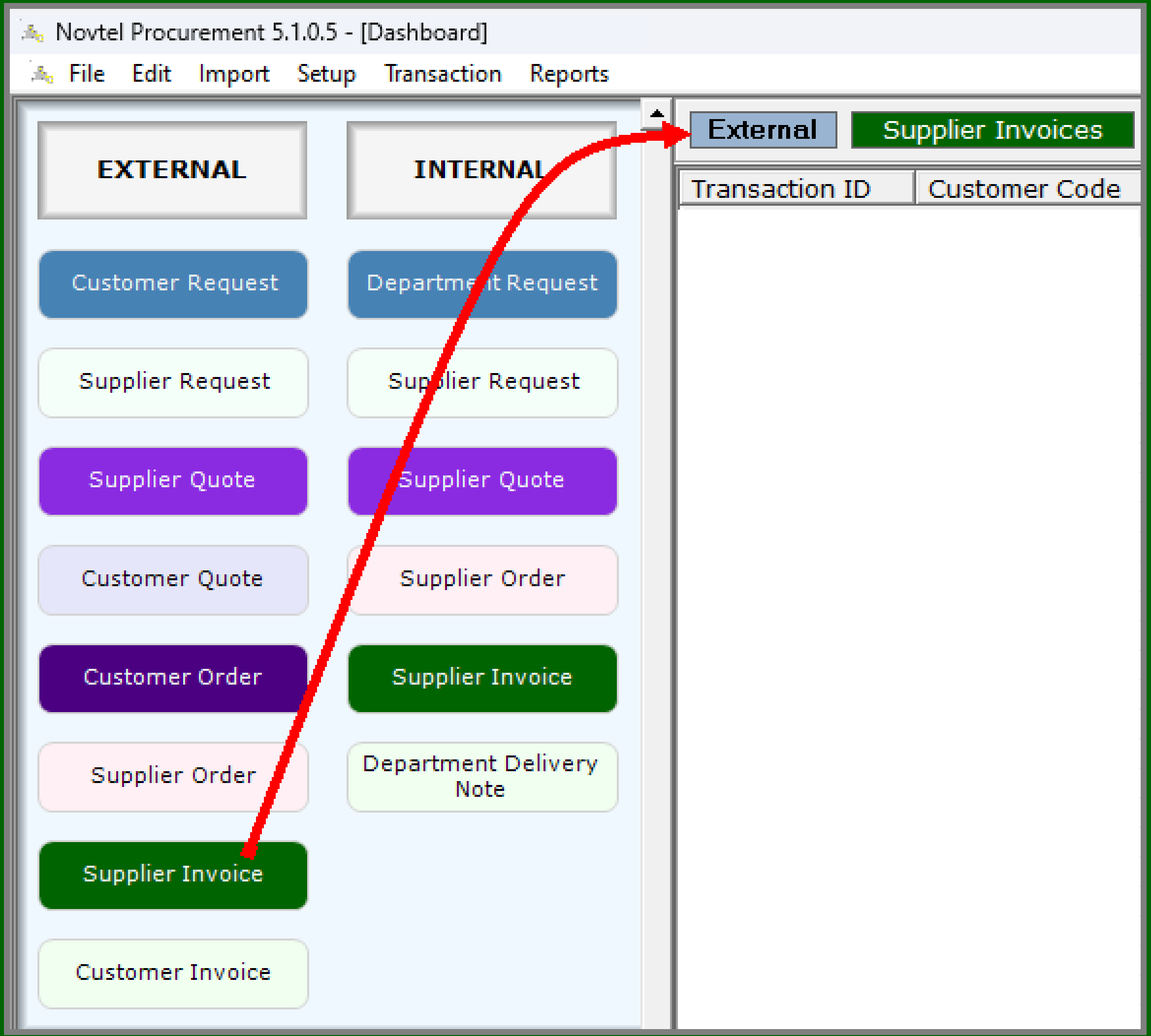


# External Procurement

## Transaction Level 7 – Supplier Invoice

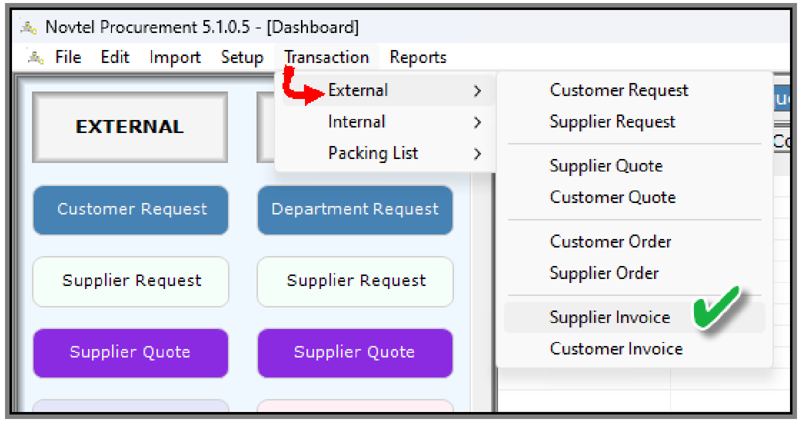


# Capturing the Supplier Invoice

External Process Step 7

EXTERNAL

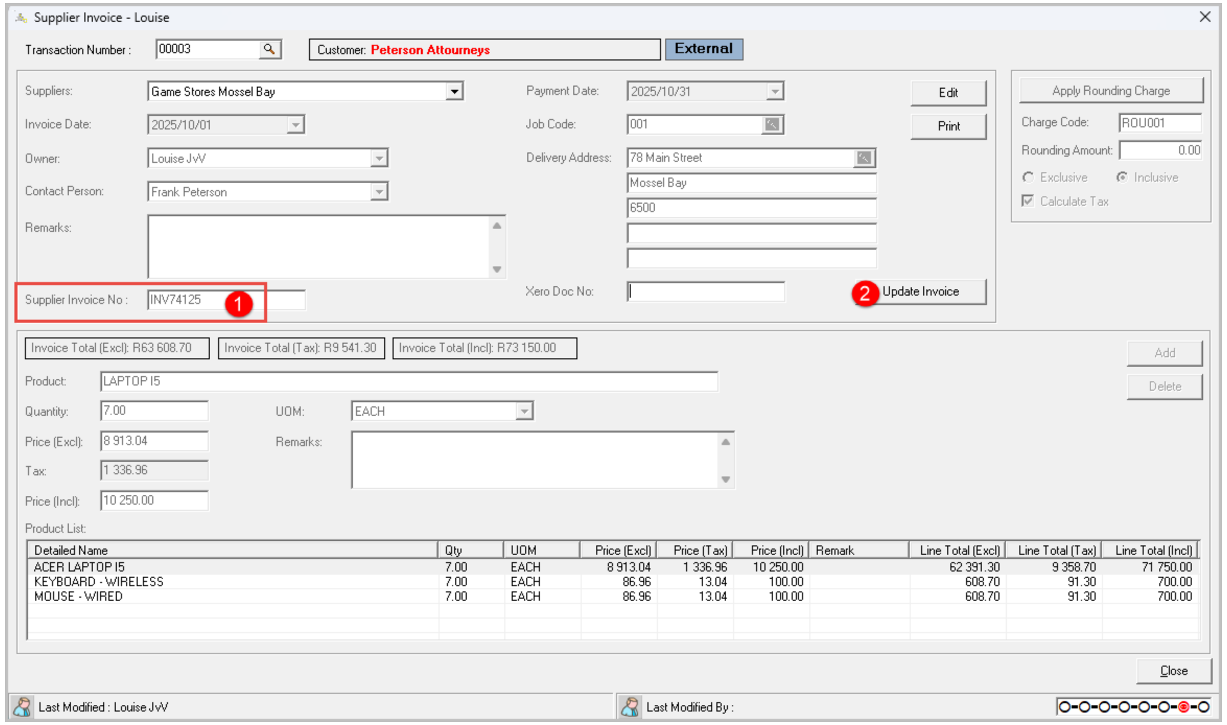
- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- 7 Supplier Invoice
- Customer Invoice




**Step 7 in the process is to capture the Invoice as received from the Supplier.**

The second last step in the external procurement process, is to capture the Supplier Invoice and updating it to the linked financial system.

The process is started by clicking ‘Transaction – External - Supplier Invoice’; searching for and selecting the required Transaction Number.




1. After clicking the ‘Edit’ button, the Supplier’s invoice number must be captured to the ‘Supplier Invoice Number’ field, and the action saved.
2. Then, the ‘Update Invoice’ button is clicked.

Novtel Sage xero

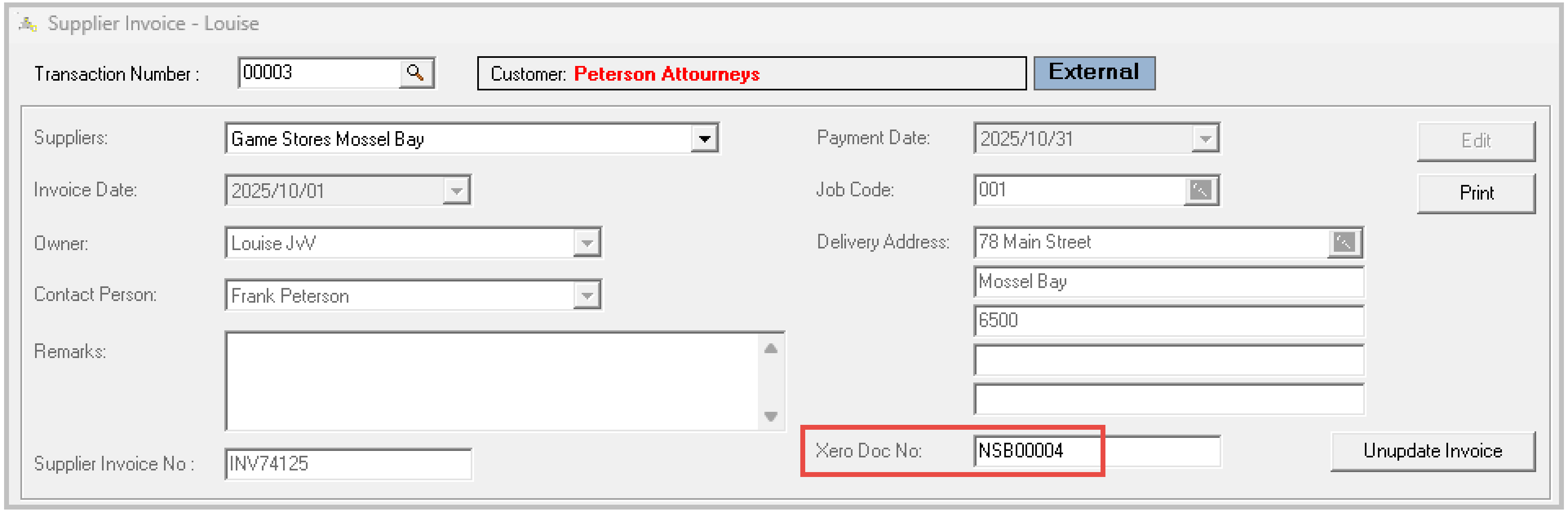
# Capturing the Supplier Invoice

External
Process
Step 7

EXTERNAL
- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- 7 Supplier Invoice
- Customer Invoice

Integration

When Novtel Procurement is integrated with Xero, the 'Xero Document Number' will be displayed here after updating the Invoice.




Novtel Sage xero

# External Process Step 7

External | Supplier Invoices

# Capturing the Supplier Invoice

**EXTERNAL**

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- 7 Supplier Invoice
- Customer Invoice

## Integration

The Companion App has imported the transaction to Xero Successfully.

**Filters**

Novtel Product
- [ ] Novtel Equipment Hire
- [ ] Novtel Hospitality
- [x] Novtel Procurement
- [ ] Novtel Property Management
- [ ] Novtel Relations
- [ ] Novtel Self Storage
- [ ] Novtel Vehicle Hire
- [x] Xero Companion

Category
- [ ] Contacts
- [ ] Inventory
- [x] Invoicing
- [ ] Synchronization
- [ ] Transactions

Status
- [x] Completed
- [x] Failed
- [x] Recorded

Xero Organization

All

Workstation

**Xero Tasks**

0 Recorded 0%

0 Failed 0%

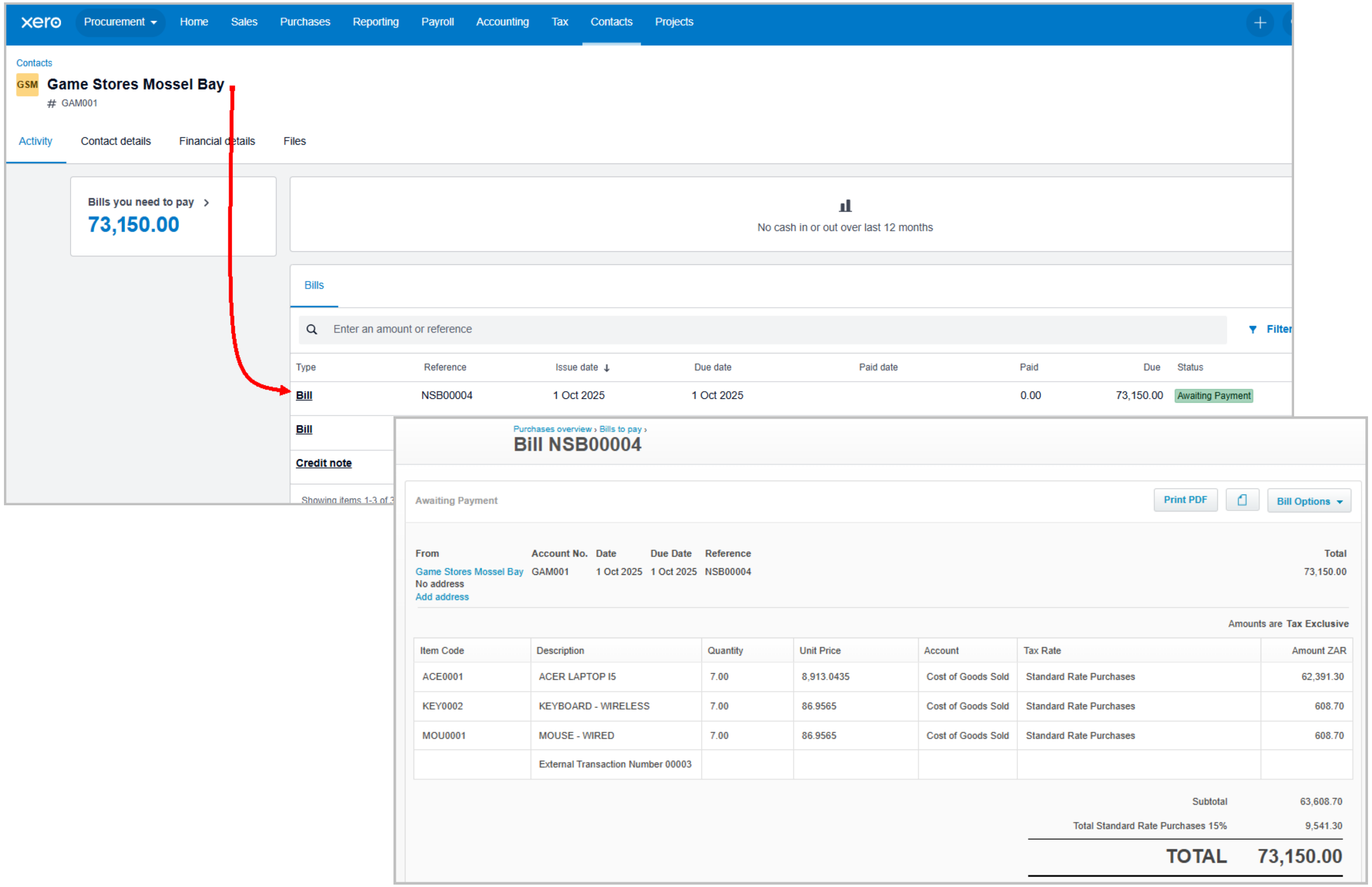
8 Completec 100%

| DATE RECORDED | WORKSTATION | USERNAME | NOVTEL PRODUCT | NOVTEL DATASET | NOVTEL SOURCE | XERO TASK TYPE | XERO ORGANIZATION | TASK STATUS | REFERENCE |
|---|---|---|---|---|---|---|---|---|---|
| 23 Sep 2025 @ 08:38 | LOUISE | Louise | Procurement | Default Dataset | External Supplier Invoice (00001) | Import Bill | Procurement | Completed | NSB00001 |
| 23 Sep 2025 @ 12:56 | LOUISE | Louise | Procurement | Default Dataset | External Customer Invoice (00001) | Import Invoice | Procurement | Completed | INV-0001 |
| 23 Sep 2025 @ 13:23 | LOUISE | Louise | Procurement | Default Dataset | External Customer Invoice (00001) | Import Credit Note | Procurement | Completed | CN-0002 |
| 23 Sep 2025 @ 14:04 | LOUISE | Louise | Procurement | Default Dataset | External Supplier Invoice (00001) | Import Debit Note | Procurement | Completed | NDN00001 |
| 29 Sep 2025 @ 09:20 | LOUISE | Louise | Procurement | Default Dataset | Internal Supplier Invoice (00002) | Import Bill | Procurement | Completed | NSB00002 |
| 29 Sep 2025 @ 09:53 | LOUISE | Louise | Procurement | Default Dataset | Internal Supplier Invoice (00002) | Import Debit Note | Procurement | Completed | NDN00002 |
| 29 Sep 2025 @ 10:17 | LOUISE | Louise | Procurement | Default Dataset | Internal Supplier Invoice (00002) | Import Bill | Procurement | Completed | NSB00003 |
| 29 Sep 2025 @ 13:00 | LOUISE | Louise | Procurement | Default Dataset | External Supplier Invoice (00003) | Import Bill | Procurement | Completed | NSB00004 |

# Capturing the Supplier Invoice

# External Process Step 7

EXTERNAL
Customer Request
Supplier Request
Supplier Quote
Customer Quote
Customer Order
Supplier Order
7
Supplier Invoice
Customer Invoice




## Integration

Accessing the Supplier's account in Xero, the Supplier Bill is displayed as follows:

# Capturing the Supplier Invoice

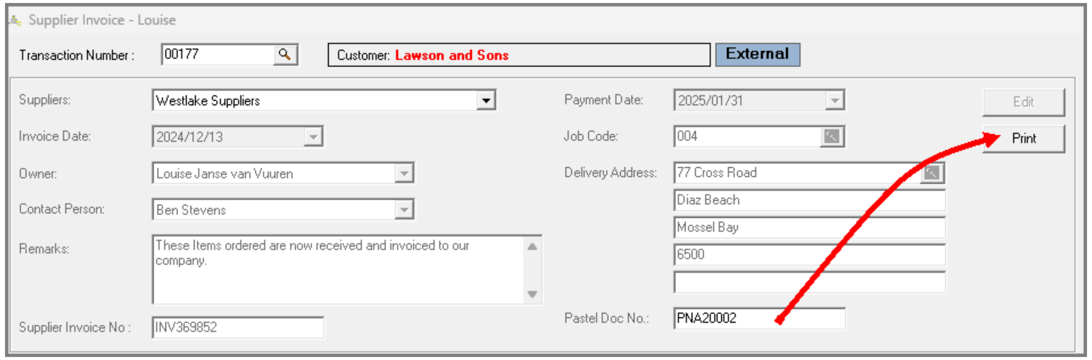
**External Process Step 7**

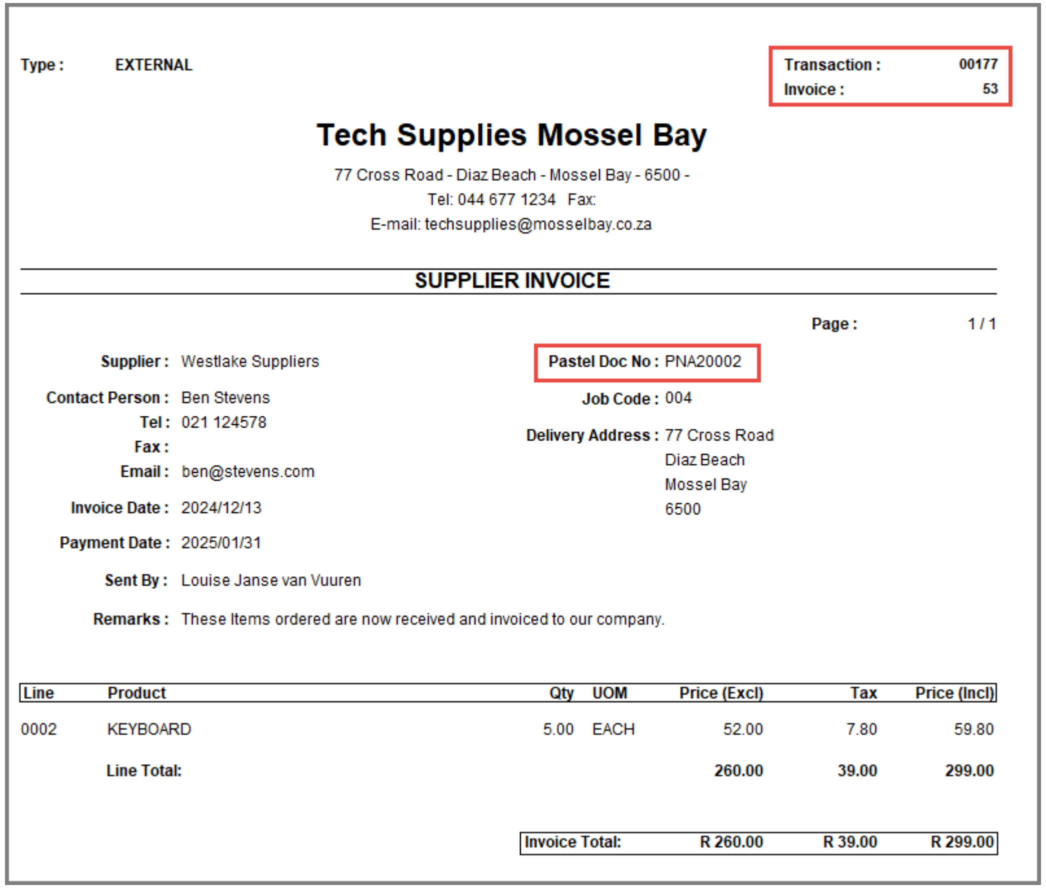
EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- 7 Supplier Invoice
- Customer Invoice

## Integration

Integrated with Sage Pastel, the Pastel Document Number is inserted and by clicking the 'Print' button, the Supplier Invoice Document is produced.



Type : EXTERNAL

Transaction : 00177
Invoice : 53

**Tech Supplies Mossel Bay**

77 Cross Road - Diaz Beach - Mossel Bay - 6500 -
Tel: 044 677 1234 Fax:
E-mail: techsupplies@mosselbay.co.za

**SUPPLIER INVOICE**

Page : 1 / 1

**Supplier :** Westlake Suppliers
**Pastel Doc No :** PNA20002
**Contact Person :** Ben Stevens
**Job Code :** 004
**Tel :** 021 124578
**Delivery Address :** 77 Cross Road, Diaz Beach, Mossel Bay, 6500
**Fax :**
**Email :** ben@stevens.com
**Invoice Date :** 2024/12/13
**Payment Date :** 2025/01/31
**Sent By :** Louise Janse van Vuuren
**Remarks :** These Items ordered are now received and invoiced to our company.

| Line | Product | Qty | UOM | Price (Excl) | Tax | Price (Incl) |
|---|---|---|---|---|---|---|
| 0002 | KEYBOARD | 5.00 | EACH | 52.00 | 7.80 | 59.80 |
| | **Line Total:** | | | **260.00** | **39.00** | **299.00** |
| | **Invoice Total:** | | | **R 260.00** | **R 39.00** | **R 299.00** |

External | Supplier Invoices

# Capturing the Supplier Invoice

# External Process Step 7

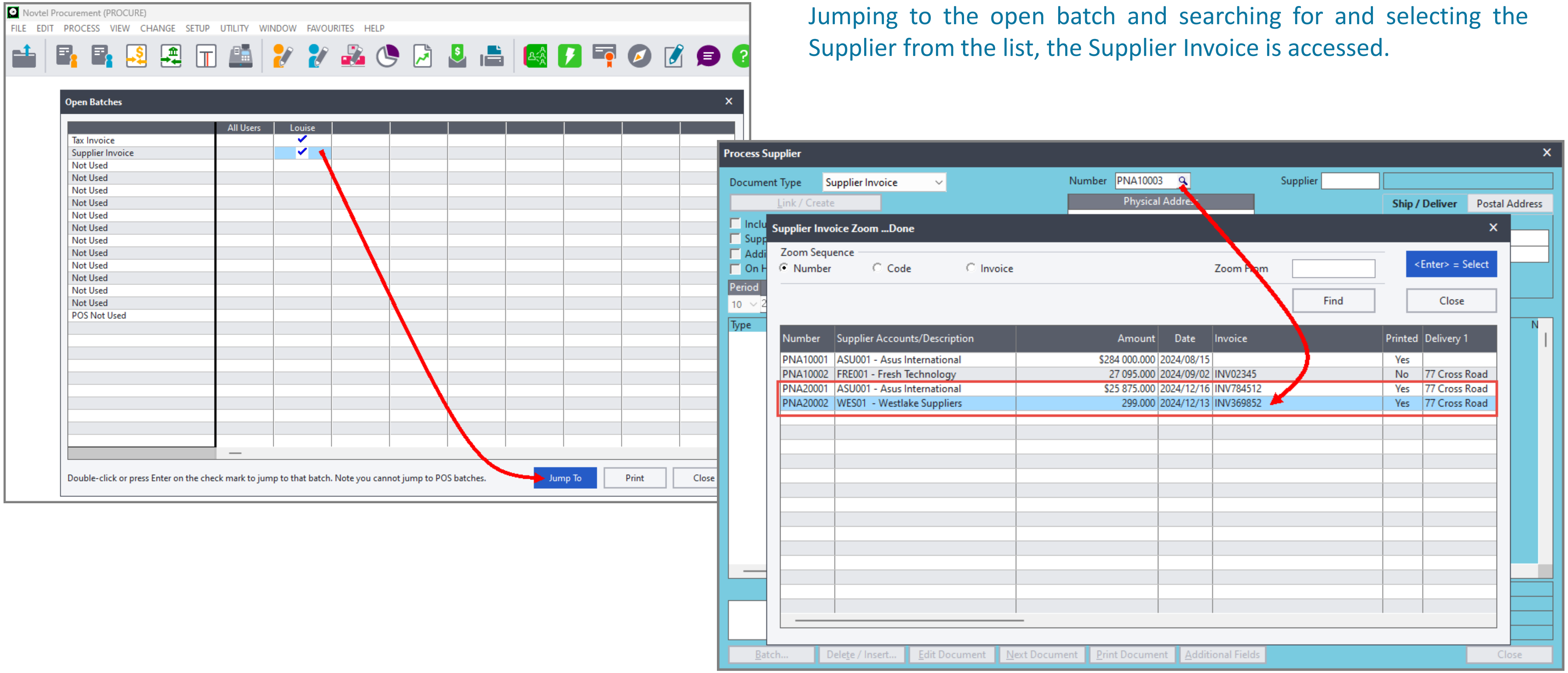
EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- 7 Supplier Invoice
- Customer Invoice

## Sage Integration

The Supplier Invoice in Sage 50c Pastel Partner is now present in an open batch.

Jumping to the open batch and searching for and selecting the Supplier from the list, the Supplier Invoice is accessed.



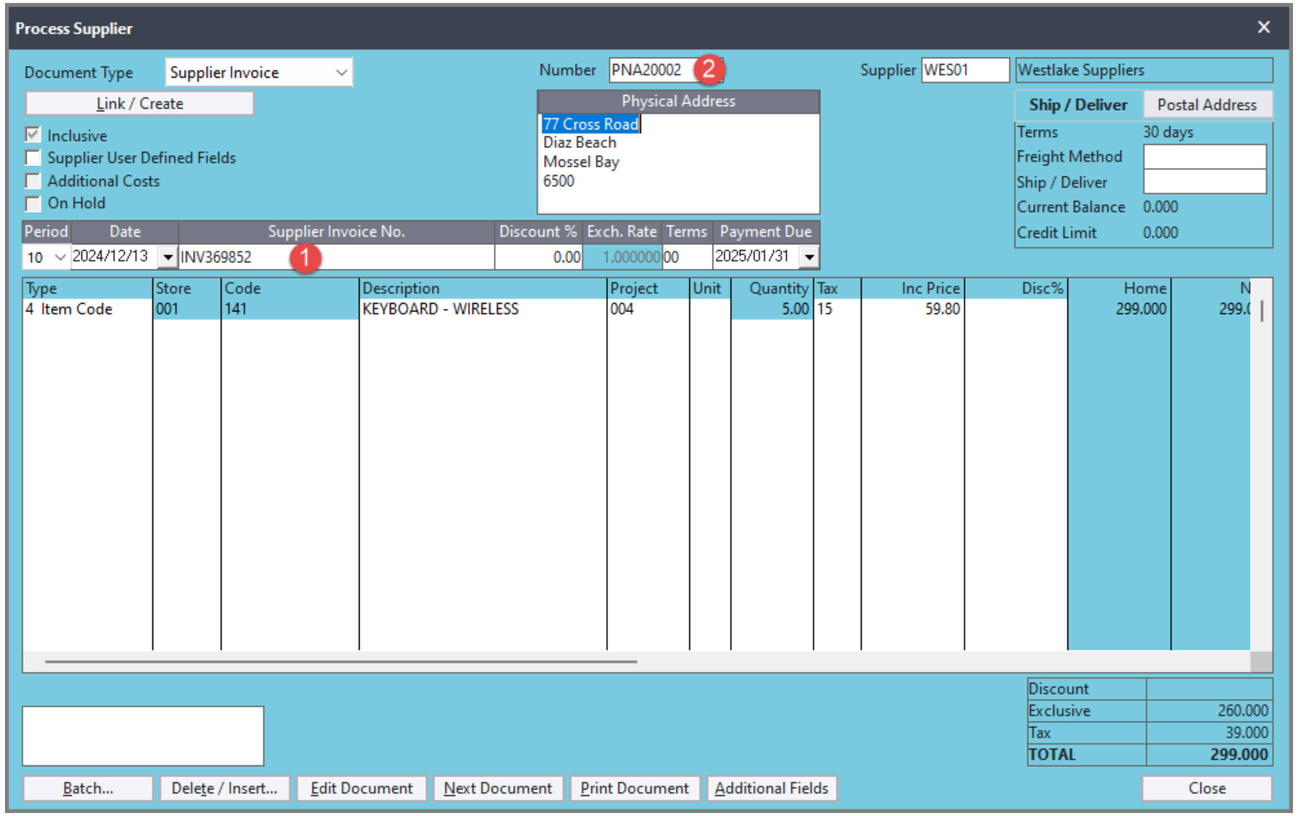

Novtel Sage xero

# Capturing the Supplier Invoice

External Process Step 7

EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- 7 Supplier Invoice
- Customer Invoice



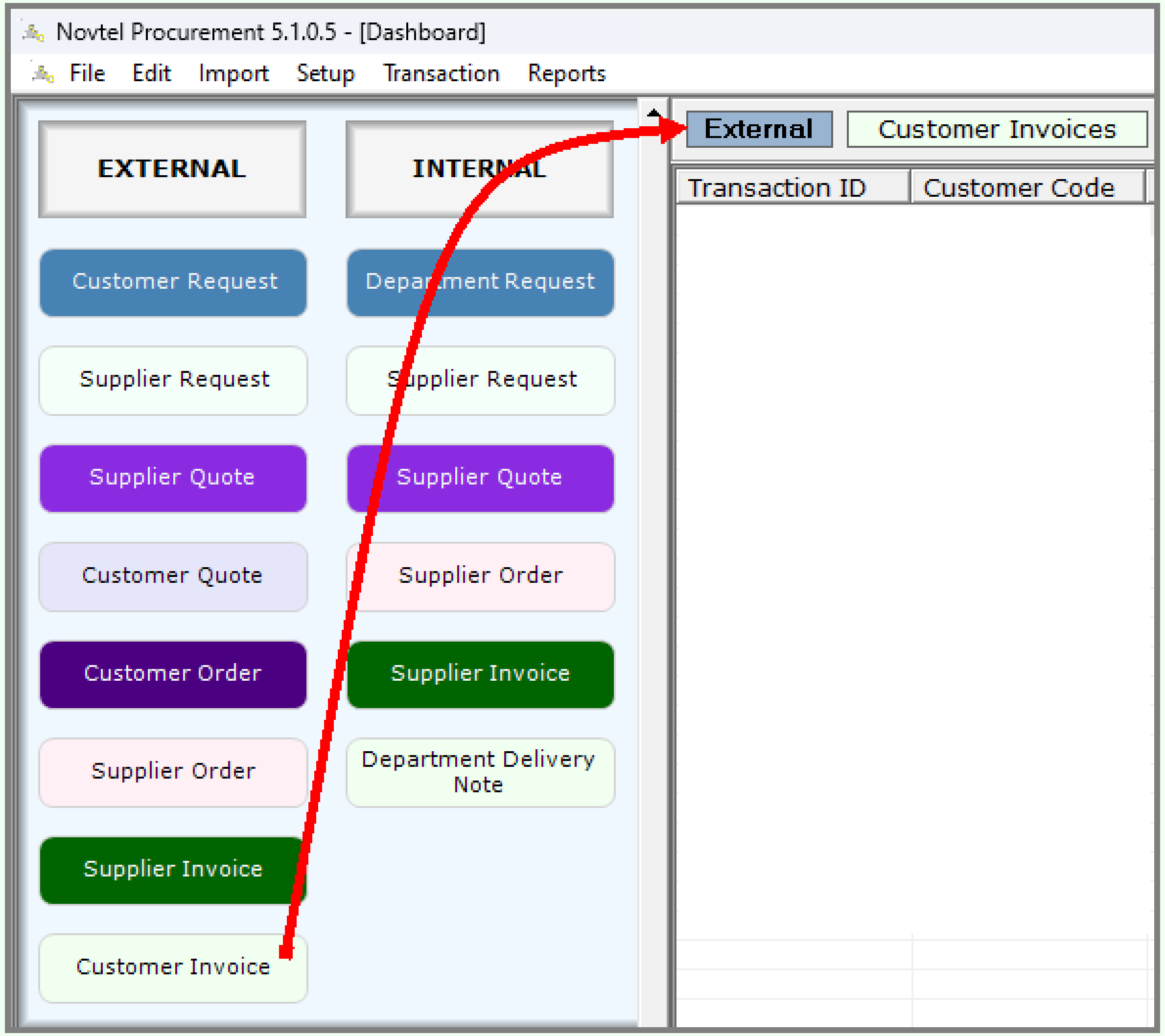

Sage Integration

1. The Supplier Invoice is displayed as follows, and indicating the Supplier Invoice Number (INV369852) as captured to Novtel.
2. The Pastel Document Number corresponds with the number allocated to the Supplier Invoice Document in Novtel. (PNA2002)

Novtel

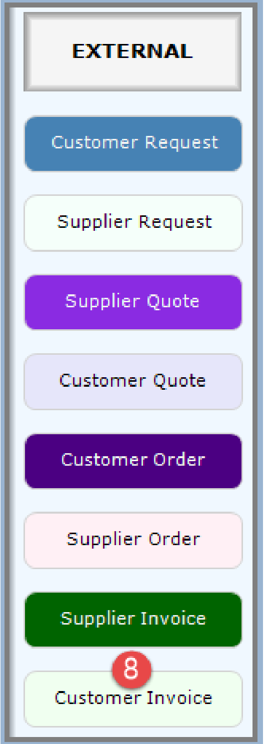
# External Procurement

## Transaction Level 8 – Customer Invoice



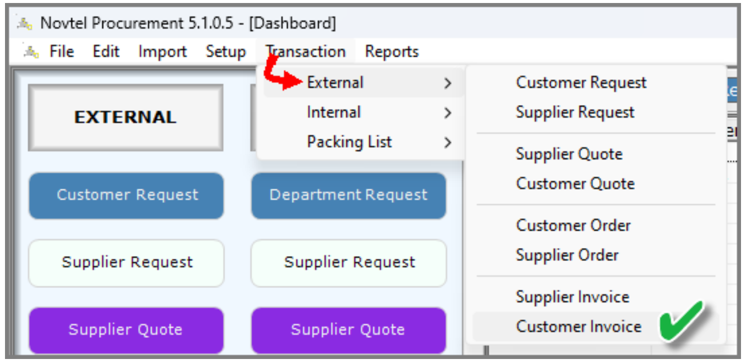

Novtel Sage xero

# External Process Step 8




External | Customer Invoices

# Issuing the Customer Invoice

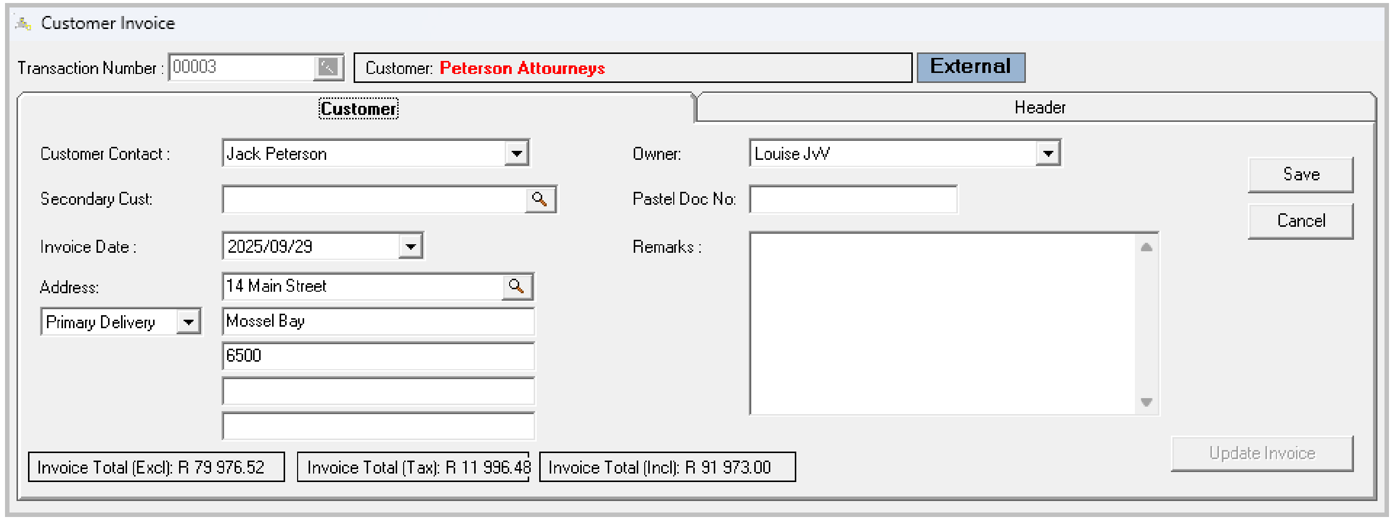



**Step 8 is the final step in the External Procurement Process and entails that the Customer Invoice is issued.**

The Customer Invoice is to be issued as the last step in the external procurement process.

From the 'Transaction – External - Customer Invoice' menu option, the required transaction number is to be searched for and selected.

By default, the latest transaction number linked to the current 'Supplier Invoice' transaction level, is displayed.




Novtel Sage xero

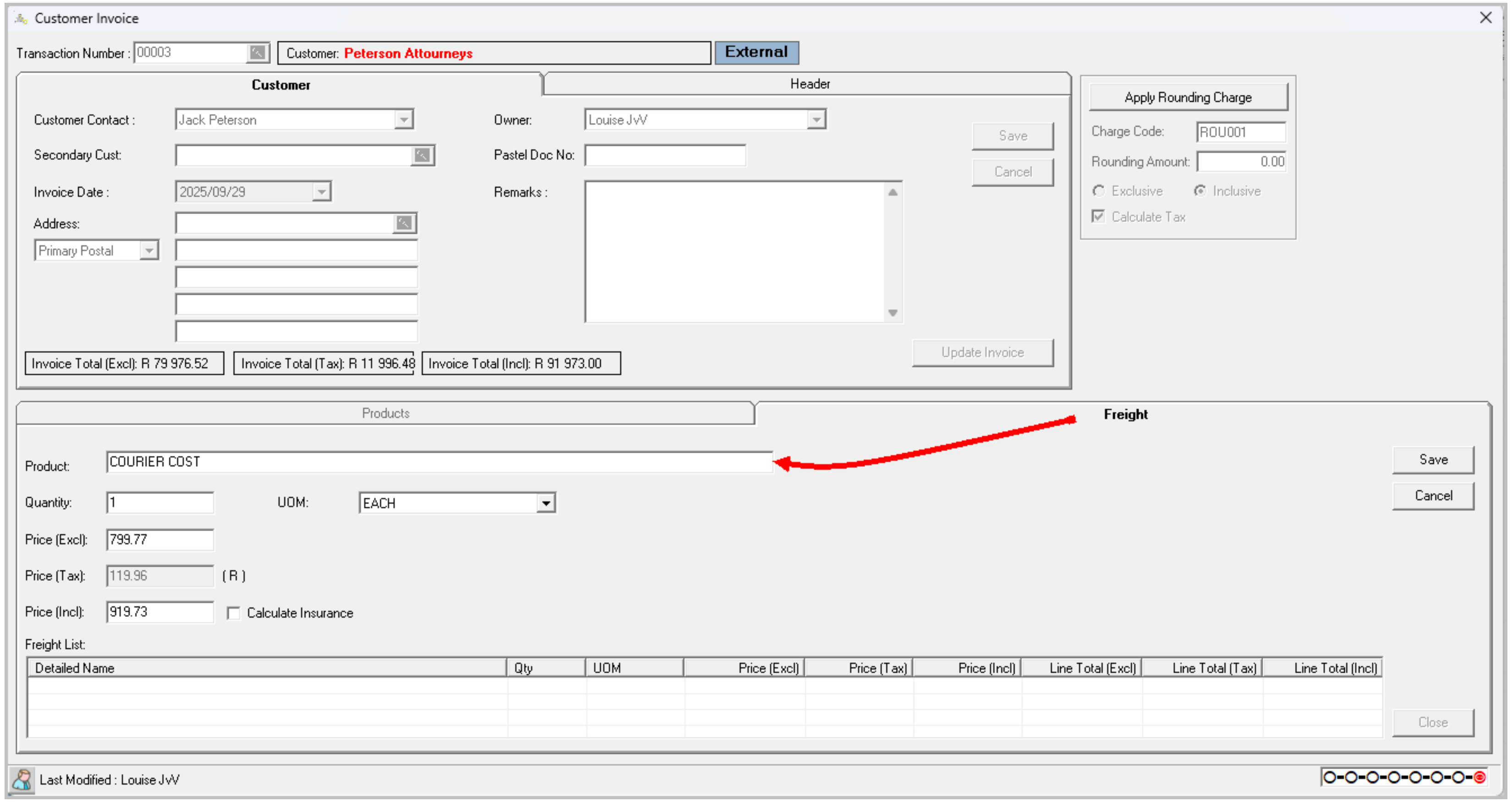
# External Process Step 8

External | Customer Invoices

## Issuing the Customer Invoice

EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice




In the 'Freight' tab, a courier fee can be added if required.

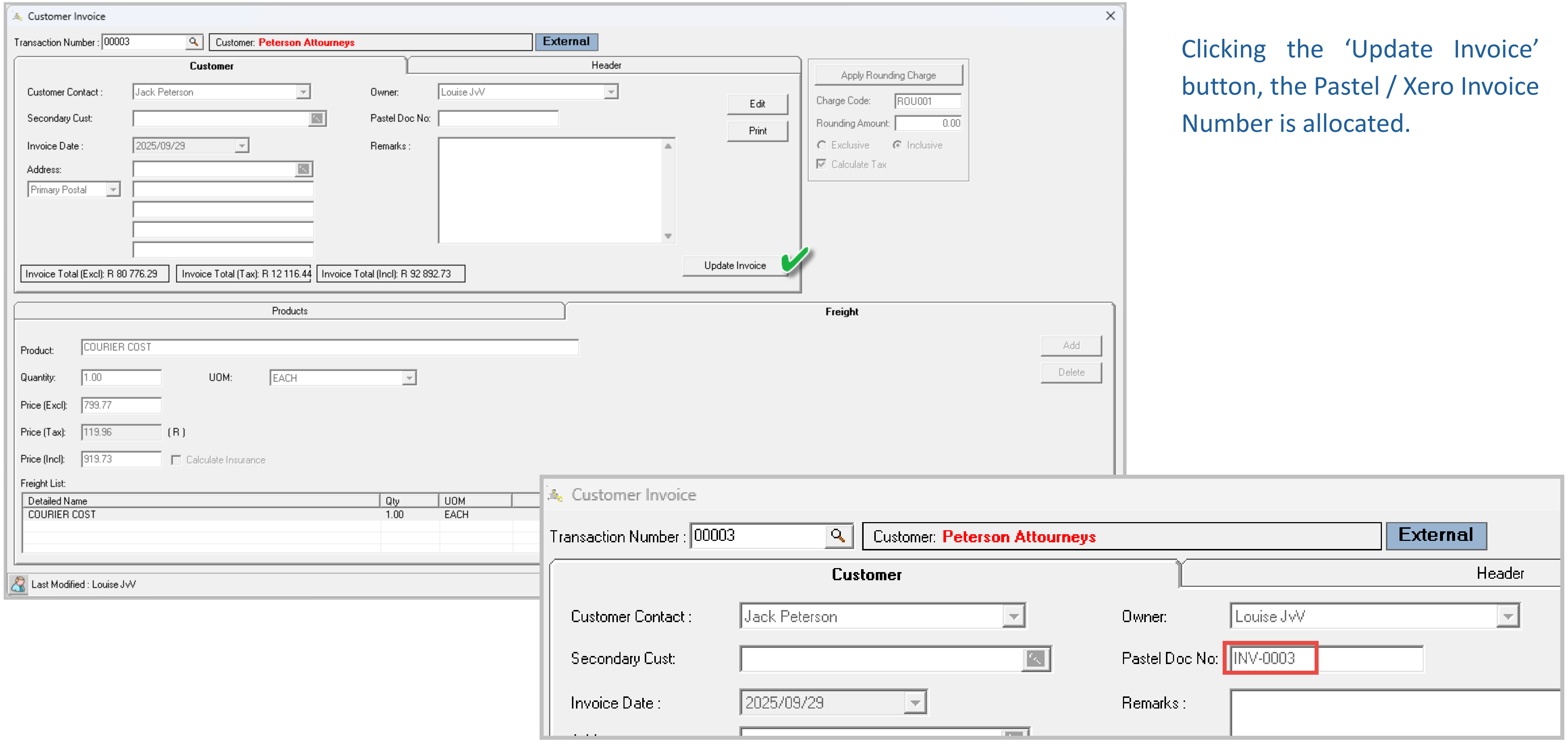
# External Process Step 8

External | Customer Invoices

# Issuing the Customer Invoice

EXTERNAL

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice




Clicking the ‘Update Invoice’ button, the Pastel / Xero Invoice Number is allocated.

# External Process Step 8

External | Customer Invoices

# Issuing the Customer Invoice

**TAX INVOICE**

| | | | |
|---|---|---|---|
| **Customer :** | Peterson Attourneys | **Invoice Date :** | 2025/09/29 |
| **Address :** | | **Invoice Number :** | 0000000003 |
| | | **UCR Number :** | |
| | | **Delivery Address :** | 14 Main Street<br>Mossel Bay<br>6500 |
| **Type:** | EXTERNAL | | **Page 1 of 1** |

| Customer Ref | Transport | BL / AWB No | Incoterm | Licence | Job Code | Account |
|---|---|---|---|---|---|---|
| | | | | | 001 | PET001 |

| Product | UOM | Qty | Price (Excl) | Price (Tax) | Price (Incl) |
|---|---|---|---|---|---|
| ACER LAPTOP I5 | EACH | 7.00 | 11,216.52 | 1,682.48 | 12,899.00 |
| **Line Total:** | | | **78,515.65** | **11,777.35** | **90,293.00** |
| KEYBOARD - WIRELESS | EACH | 7.00 | 104.35 | 15.65 | 120.00 |
| **Line Total:** | | | **730.43** | **109.57** | **840.00** |
| MOUSE - WIRED | EACH | 7.00 | 104.35 | 15.65 | 120.00 |
| **Line Total:** | | | **730.43** | **109.57** | **840.00** |
| COURIER COST | EACH | 1.00 | 799.77 | 119.96 | 919.73 |
| **Line Total:** | | | **799.77** | **119.96** | **919.73** |
| | | **Invoice Total :** | **R 80 776.29** | **R 12 116.44** | **R 92 892.73** |

**Remarks :**

*Bank Details :*
Bank:
Branch Name:
Branch Code:
Account Name:
Account No:
SWIFT Code:

The Invoice can now be printed to PDF format and emailed to the Customer from your email program.

**EXTERNAL**

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice

Novtel Sage xero

# External Process Step 8

External | Customer Invoices

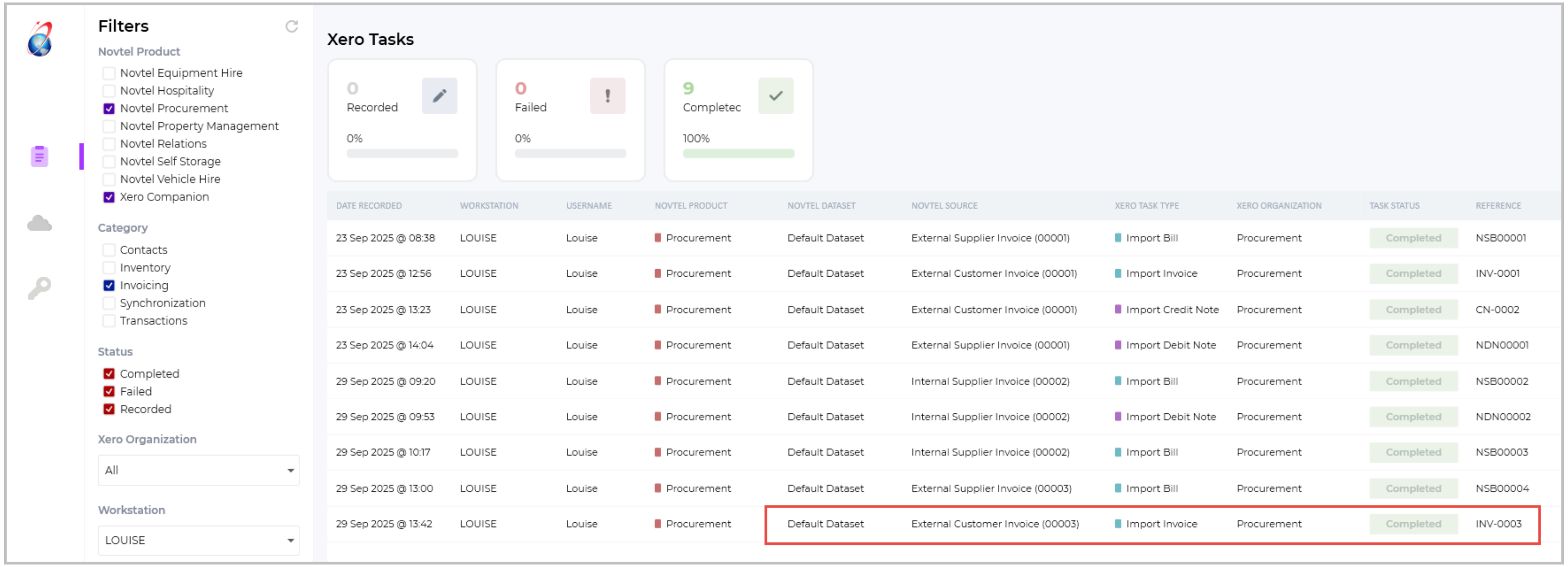
# Issuing the Customer Invoice

**EXTERNAL**

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice

When Novtel Procurement is integrated with Xero, the transaction is imported to Xero via the Companion App.

**Integration**




| DATE RECORDED | WORKSTATION | USERNAME | NOVTEL PRODUCT | NOVTEL DATASET | NOVTEL SOURCE | XERO TASK TYPE | XERO ORGANIZATION | TASK STATUS | REFERENCE |
|---|---|---|---|---|---|---|---|---|---|
| 23 Sep 2025 @ 08:38 | LOUISE | Louise | Procurement | Default Dataset | External Supplier Invoice (00001) | Import Bill | Procurement | Completed | NSB00001 |
| 23 Sep 2025 @ 12:56 | LOUISE | Louise | Procurement | Default Dataset | External Customer Invoice (00001) | Import Invoice | Procurement | Completed | INV-0001 |
| 23 Sep 2025 @ 13:23 | LOUISE | Louise | Procurement | Default Dataset | External Customer Invoice (00001) | Import Credit Note | Procurement | Completed | CN-0002 |
| 23 Sep 2025 @ 14:04 | LOUISE | Louise | Procurement | Default Dataset | External Supplier Invoice (00001) | Import Debit Note | Procurement | Completed | NDN00001 |
| 29 Sep 2025 @ 09:20 | LOUISE | Louise | Procurement | Default Dataset | Internal Supplier Invoice (00002) | Import Bill | Procurement | Completed | NSB00002 |
| 29 Sep 2025 @ 09:53 | LOUISE | Louise | Procurement | Default Dataset | Internal Supplier Invoice (00002) | Import Debit Note | Procurement | Completed | NDN00002 |
| 29 Sep 2025 @ 10:17 | LOUISE | Louise | Procurement | Default Dataset | Internal Supplier Invoice (00002) | Import Bill | Procurement | Completed | NSB00003 |
| 29 Sep 2025 @ 13:00 | LOUISE | Louise | Procurement | Default Dataset | External Supplier Invoice (00003) | Import Bill | Procurement | Completed | NSB00004 |
| 29 Sep 2025 @ 13:42 | LOUISE | Louise | Procurement | Default Dataset | External Customer Invoice (00003) | Import Invoice | Procurement | Completed | INV-0003 |

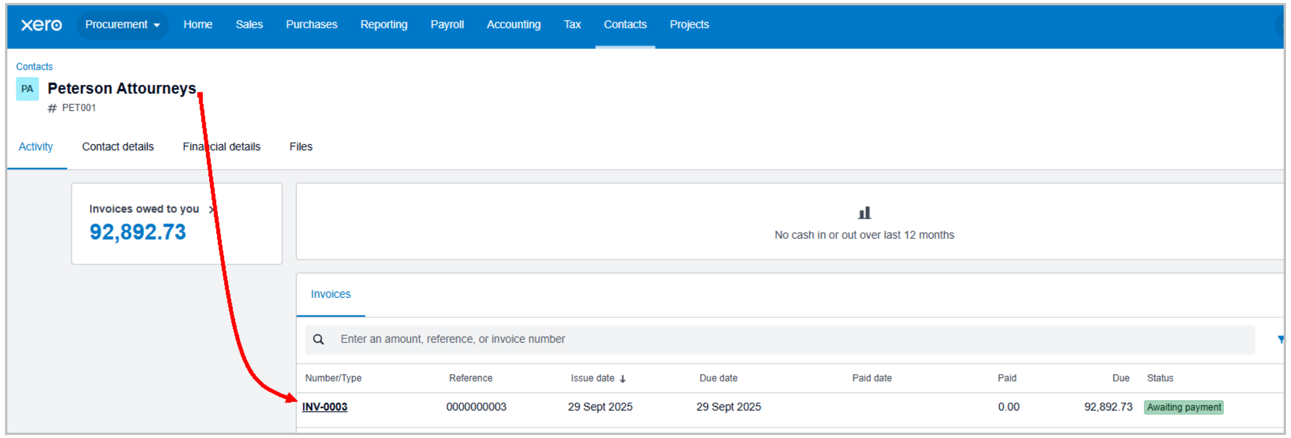
# External Process Step 8

External | Customer Invoices

# Issuing the Customer Invoice

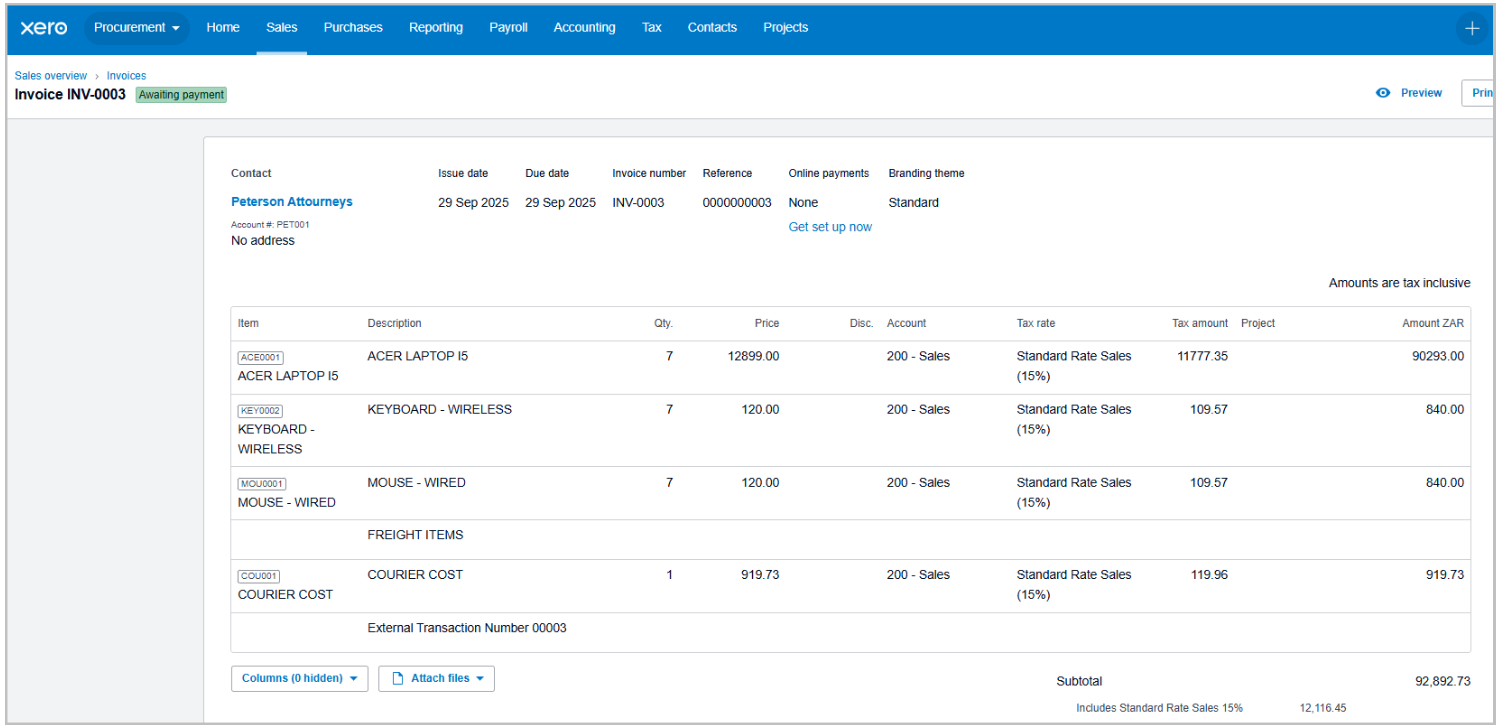
**EXTERNAL**

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice




Integration

Accessing the Customer's Account in Xero, the Transaction is reflected here and the Invoice is displayed as follows:




Novtel Sage xero

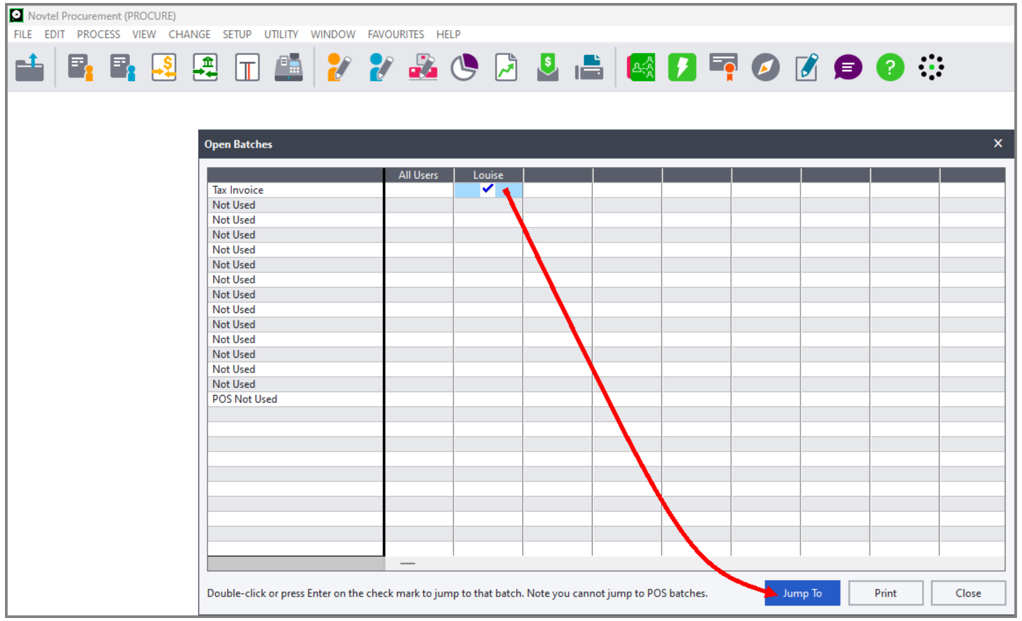
# External Process Step 8

**EXTERNAL**

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice

External | Customer Invoices

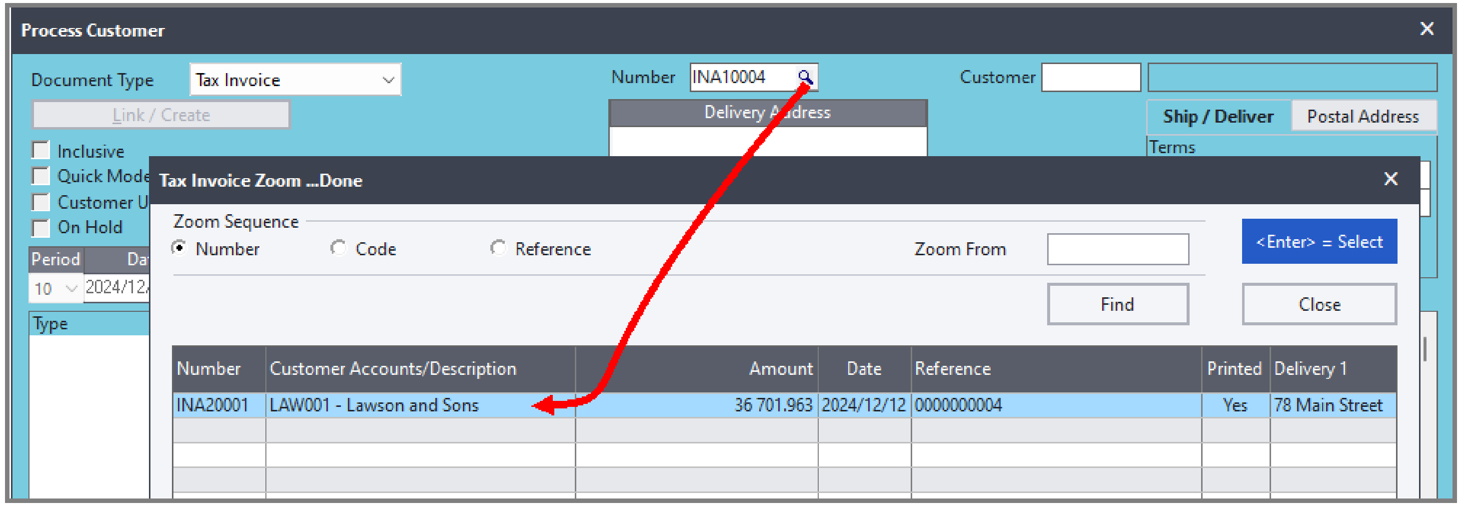
# Issuing the Customer Invoice




## Sage Integration

Integrated with Sage Pastel, the Customer Invoice is now present in an open batch in Sage 50c Pastel Partner.

Jumping to the Invoices batch, the specific invoice can be searched for and selected.




Novtel Sage xero

# External Process Step 8

External | Customer Invoices

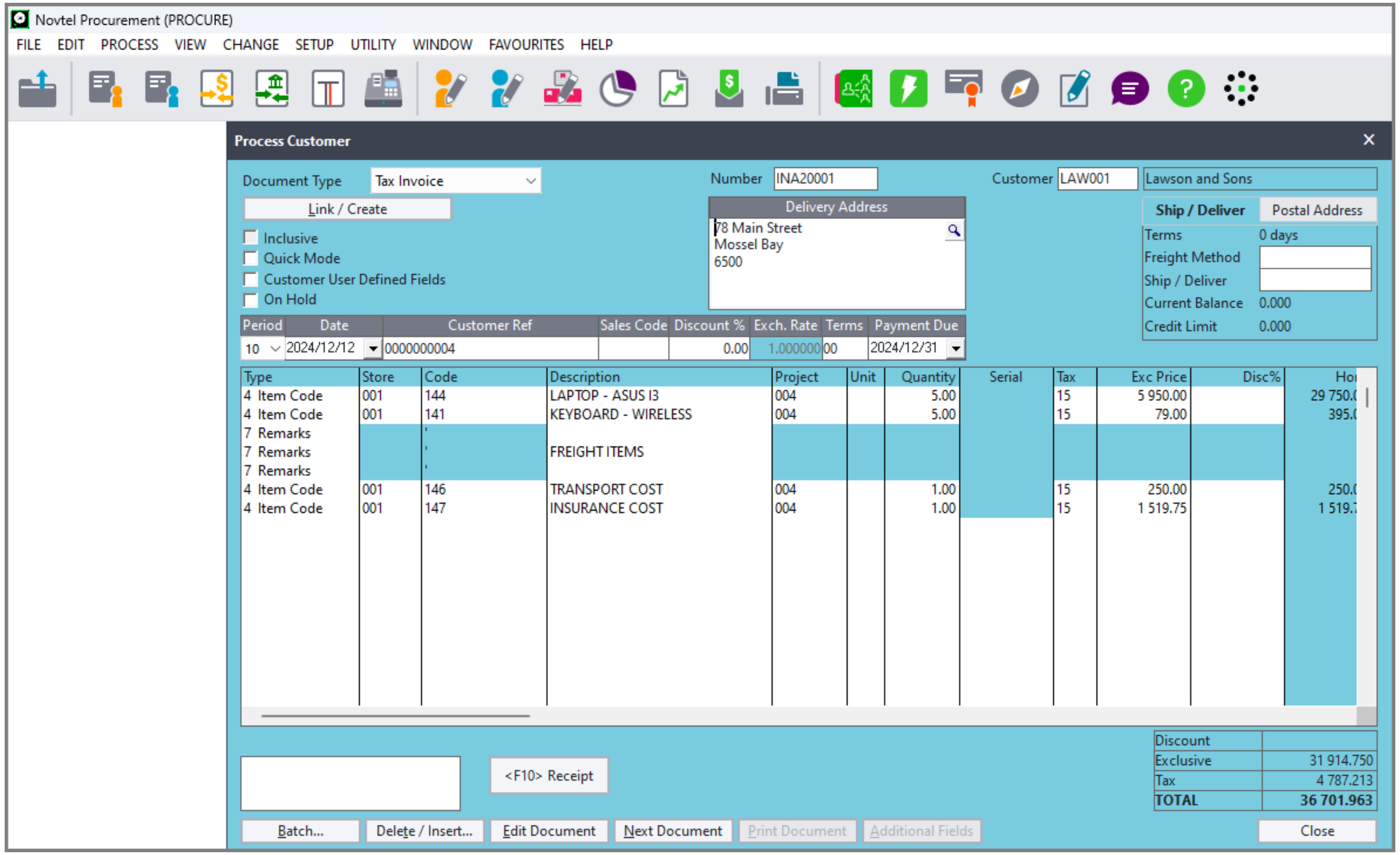


**EXTERNAL**

- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- 8 Customer Invoice

Integration

The Pastel Invoice is displayed as follows:



Novtel

# Procurement

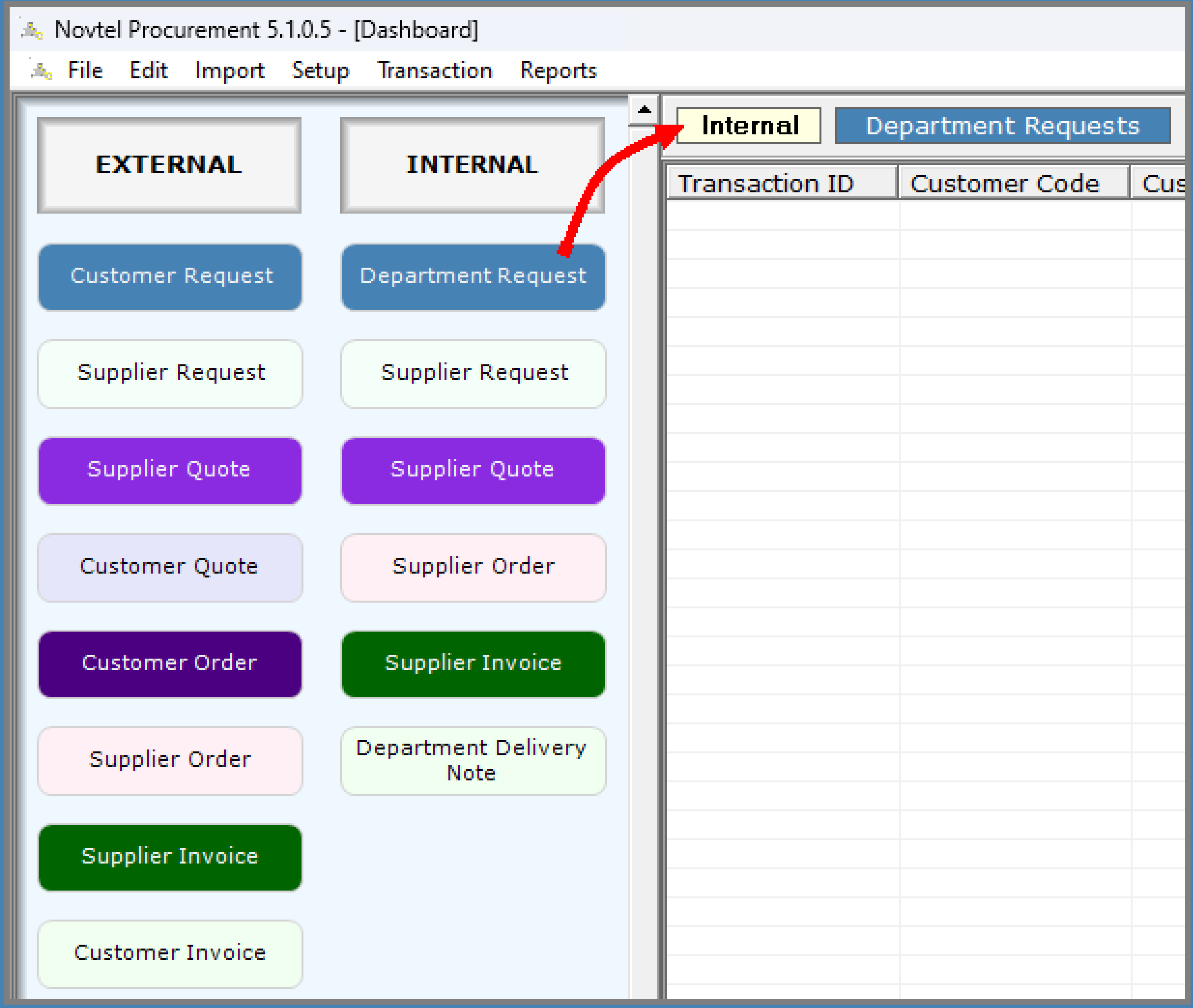
## 3

# The Internal Procurement Process

Novtel

# Internal Procurement

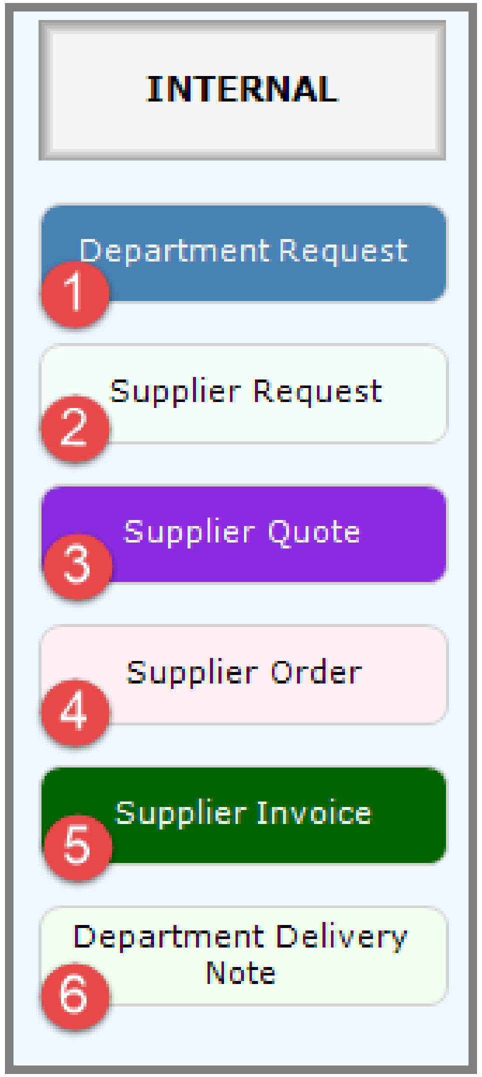
## Transaction Level 1 – Department Request




Novtel Sage xero

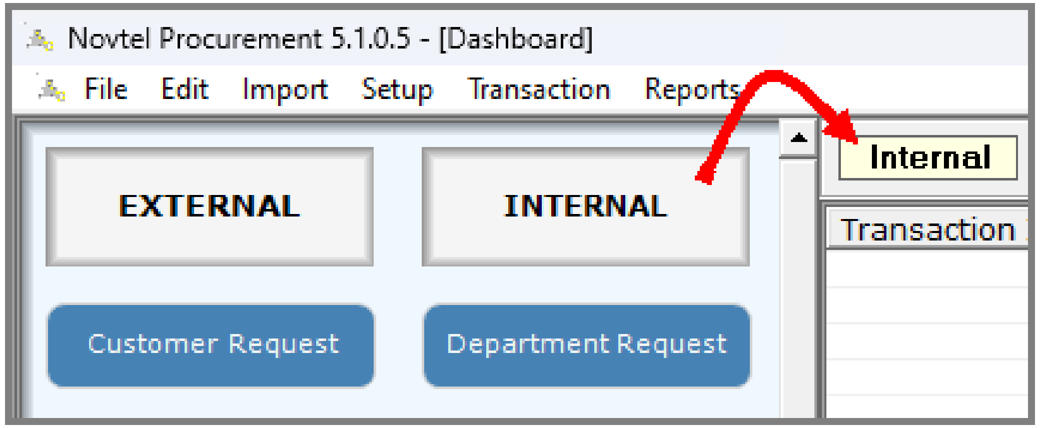
# Internal Process Step 1


## Creating the Department Request


The Internal Procurement Process has 6 steps, and will be applicable where your company sources products for its own use.

Clicking on any of the Transaction Level options below the 'Internal' heading, Novtel will display the wording 'Internal' in the colour of the Internal Procurement status.



# Internal Process Step 1

INTERNAL

1

Department Request

Supplier Request

Supplier Quote

Supplier Order

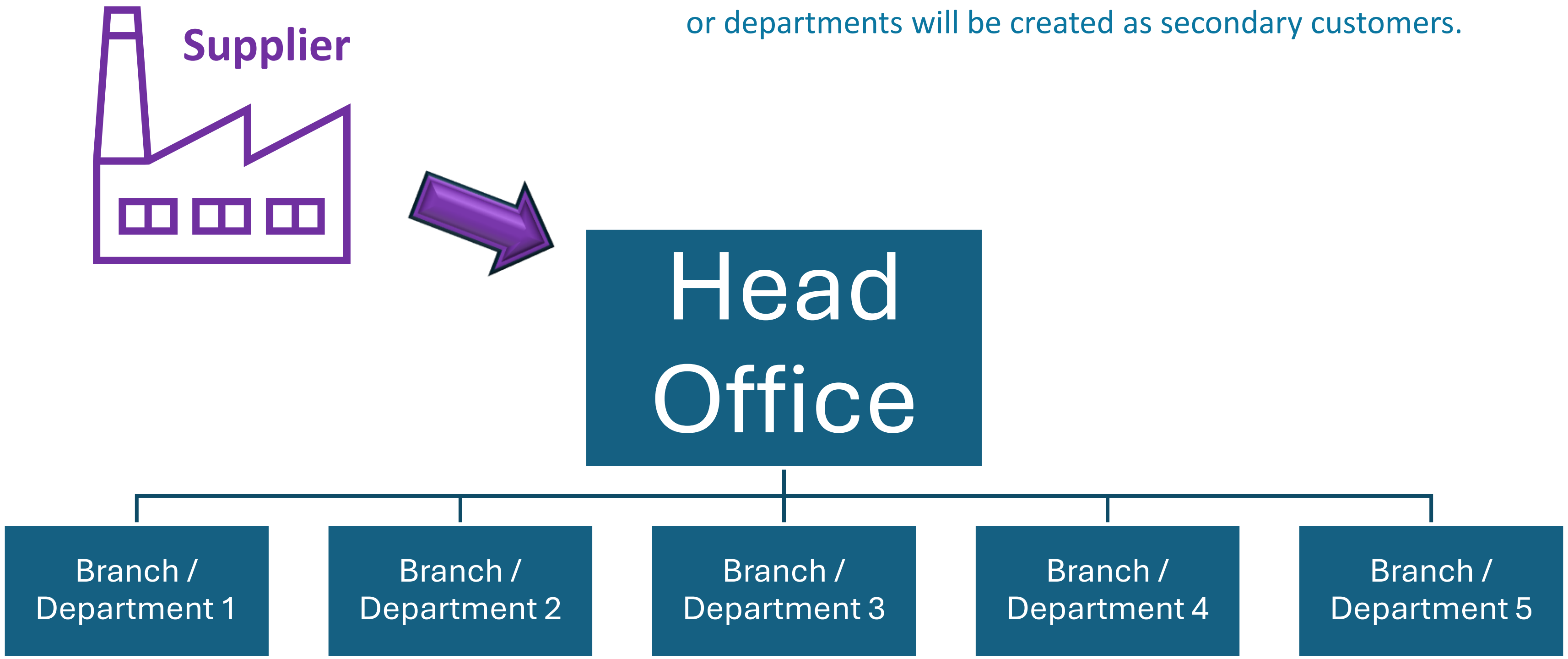
Supplier Invoice

Department Delivery Note

## Creating the Department Request

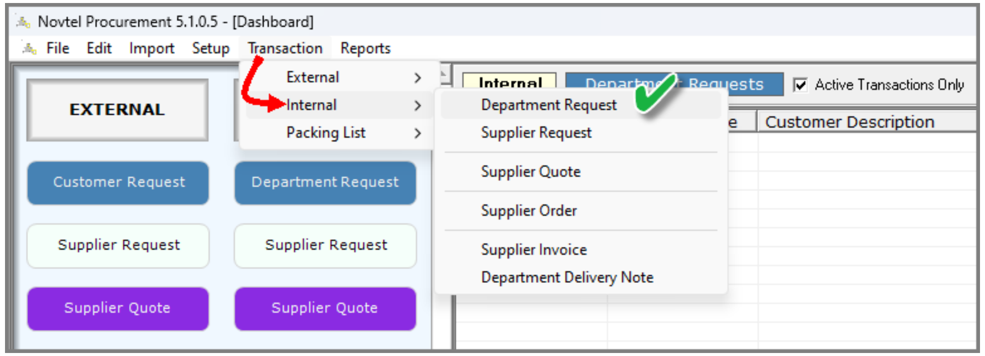
With the Internal Procurement Process, your company can secure products for the various Departments or Branches within the company structure.

Your Company will therefore be created as a 'Customer', and the branches or departments will be created as secondary customers.

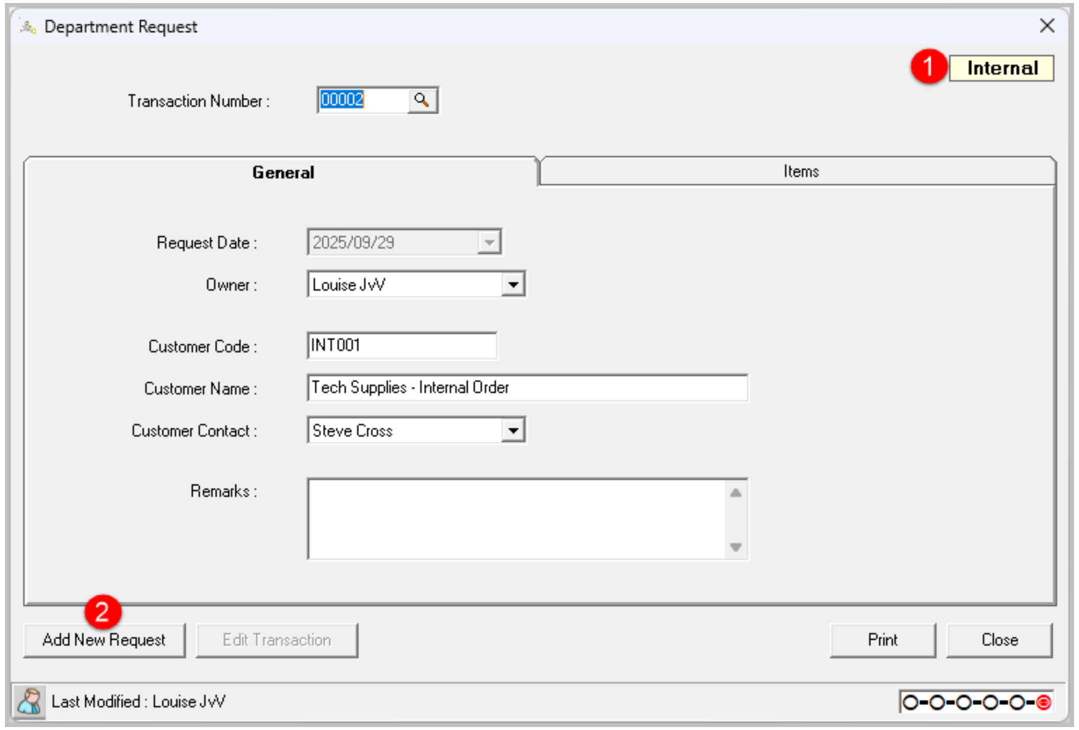


Internal | Department Requests

# Creating the Department Request


To create the Department Request, click on the 'Transaction' menu option, and select 'Internal – Department Request'.




1. At the top of the window, Novtel displays that this is an **Internal Procurement Process.**
2. To create the request, the 'Add New Request' button is clicked.

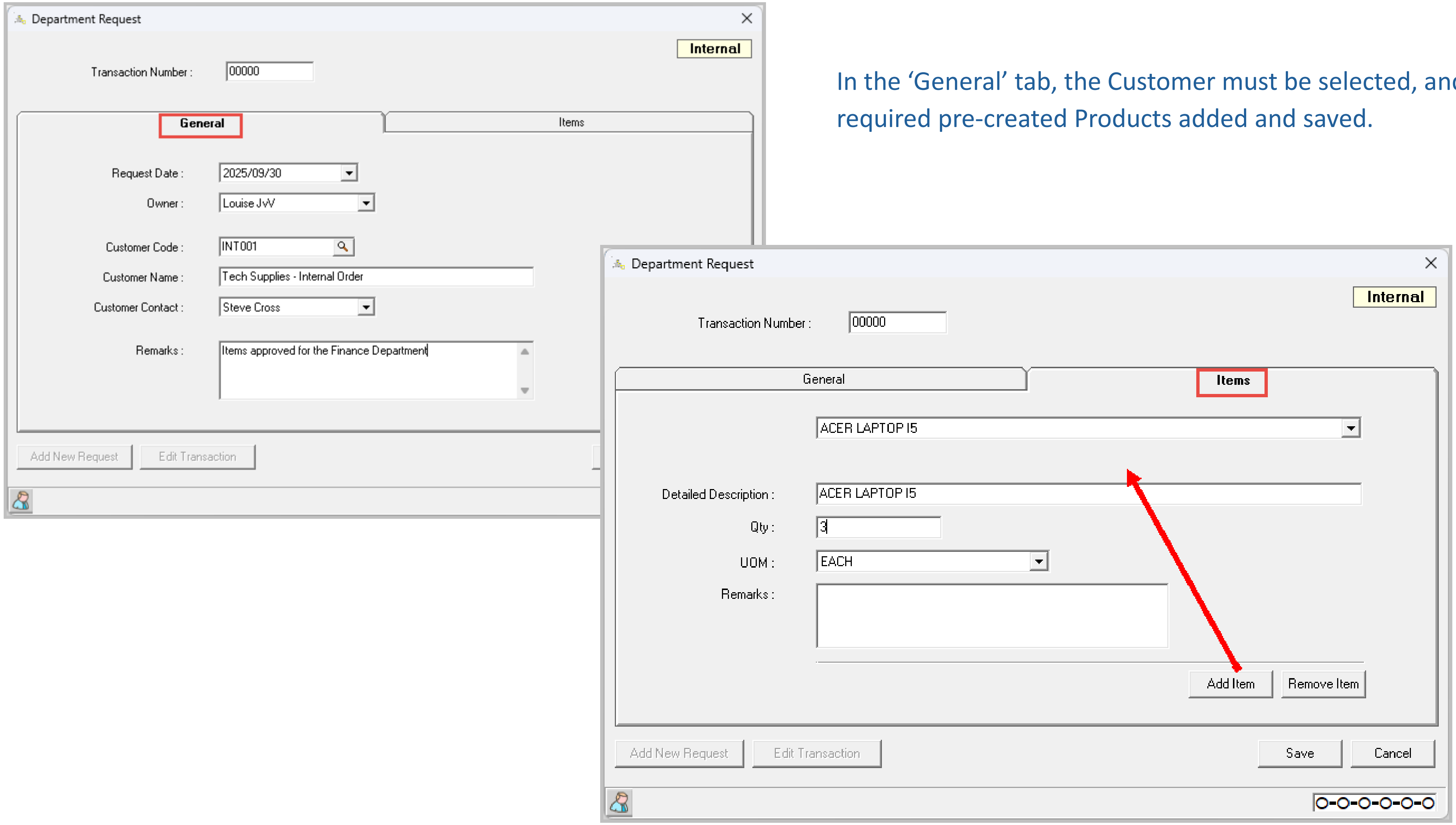
# Creating the Department Request

## Internal Process Step 1

**INTERNAL**

1. Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- Supplier Invoice
- Department Delivery Note

In the ‘General’ tab, the Customer must be selected, and the required pre-created Products added and saved.



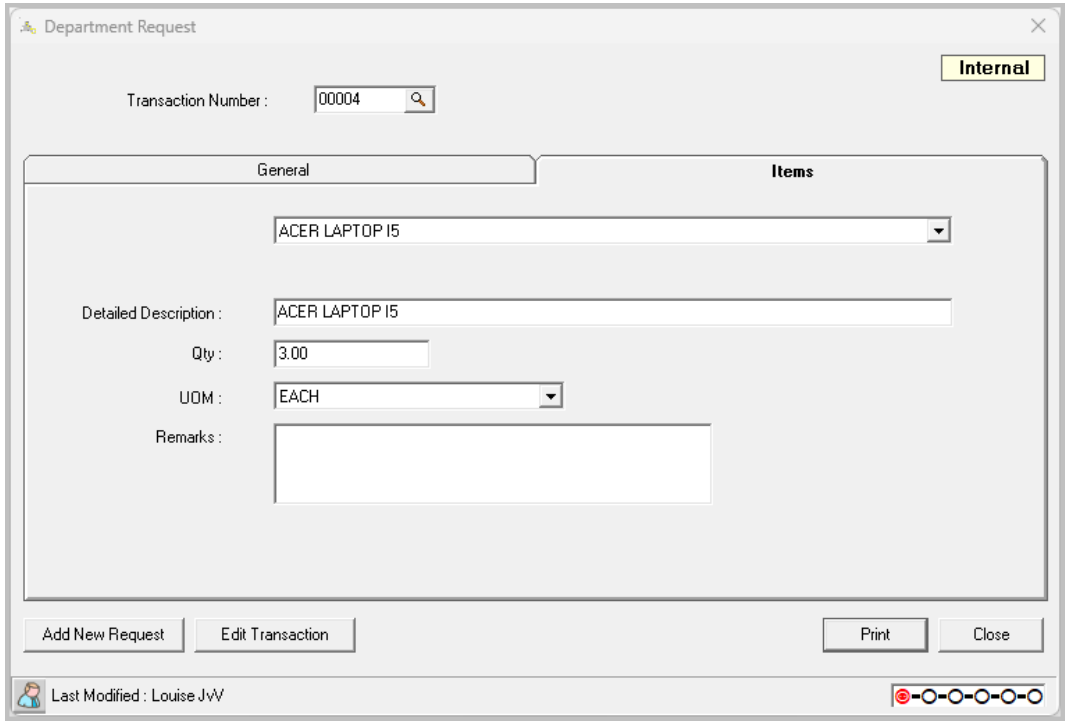
# Creating the Department Request

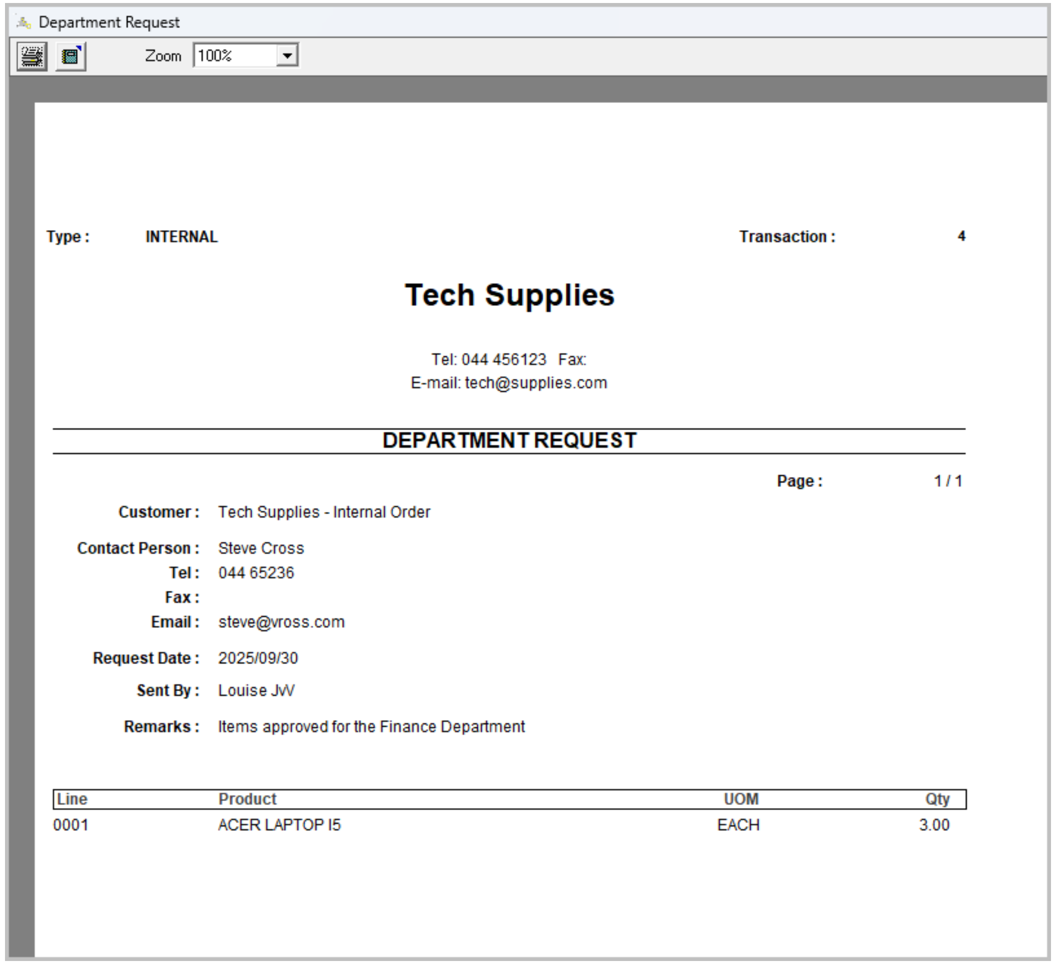
# Internal Process Step 1

**INTERNAL**

1. Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- Supplier Invoice
- Department Delivery Note

The ‘Department Request’ document can now be printed and /or saved if required, and will be displayed as follows:

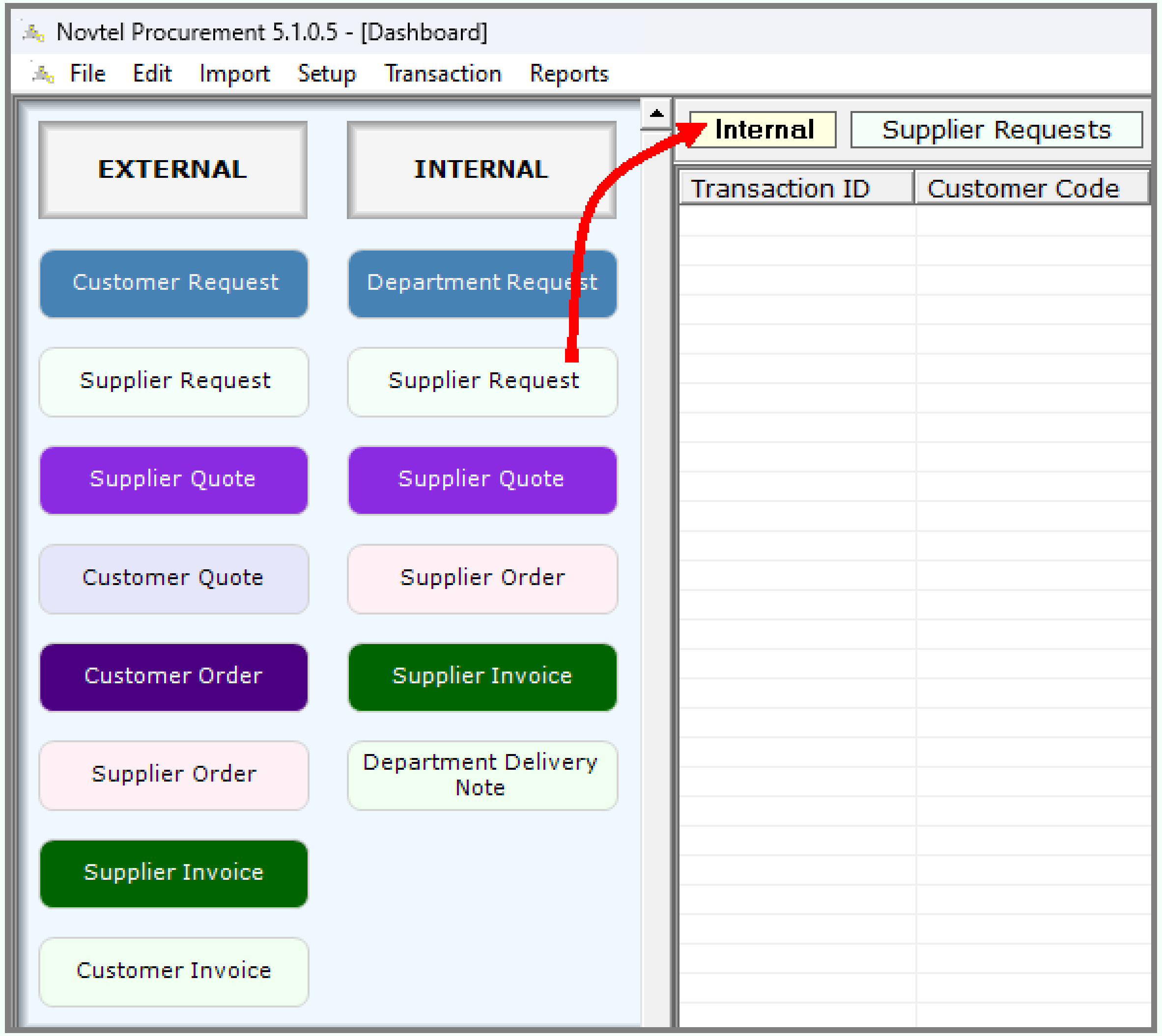


Novtel

# Internal Procurement

## Transaction Level 2 – Supplier Request

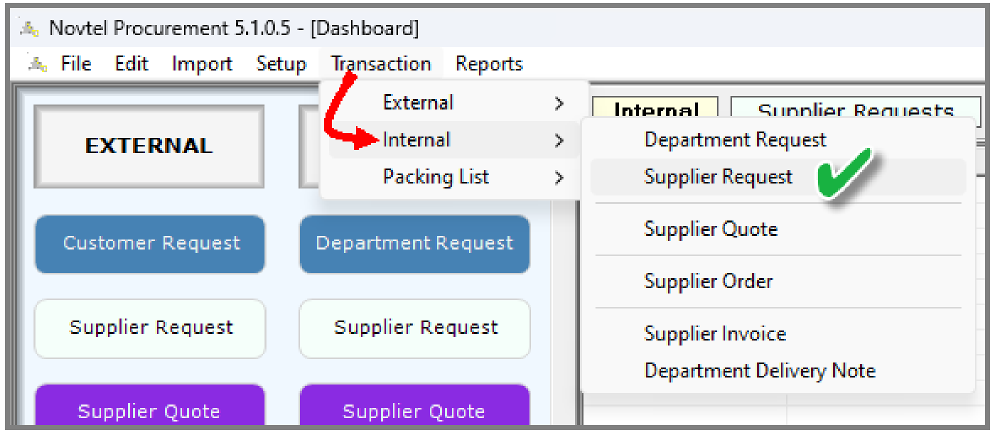



Novtel Sage xero

# Internal Process Step 2

Internal | Supplier Requests

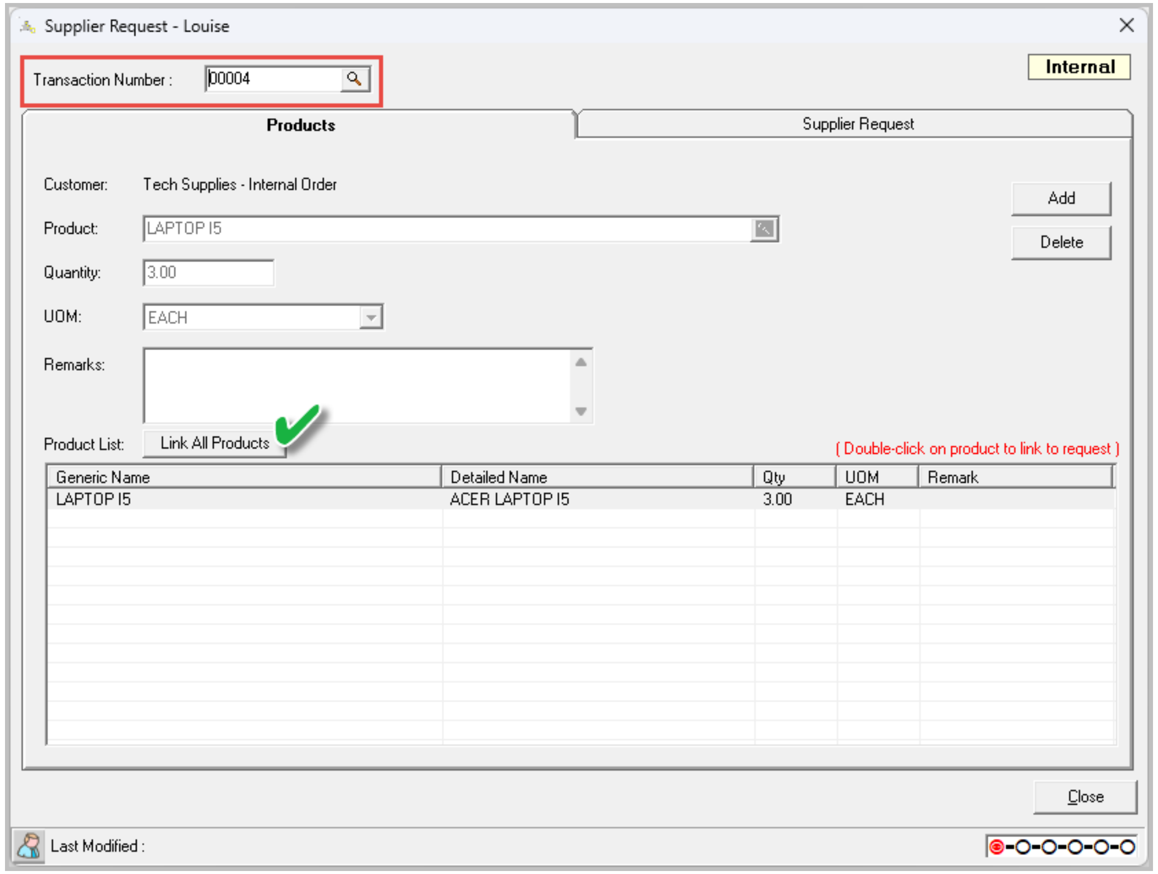
## Producing the Supplier Request


The second step in the Internal Procurement process, is to create the Supplier Request.

Clicking on the 'Transaction – Internal - Supplier Request' Transaction level option, the 'Supplier Request' screen is displayed – indicating the latest Transaction number at the top.

If this is the required transaction, the User can simply proceed with the processing.



# Internal Process Step 2

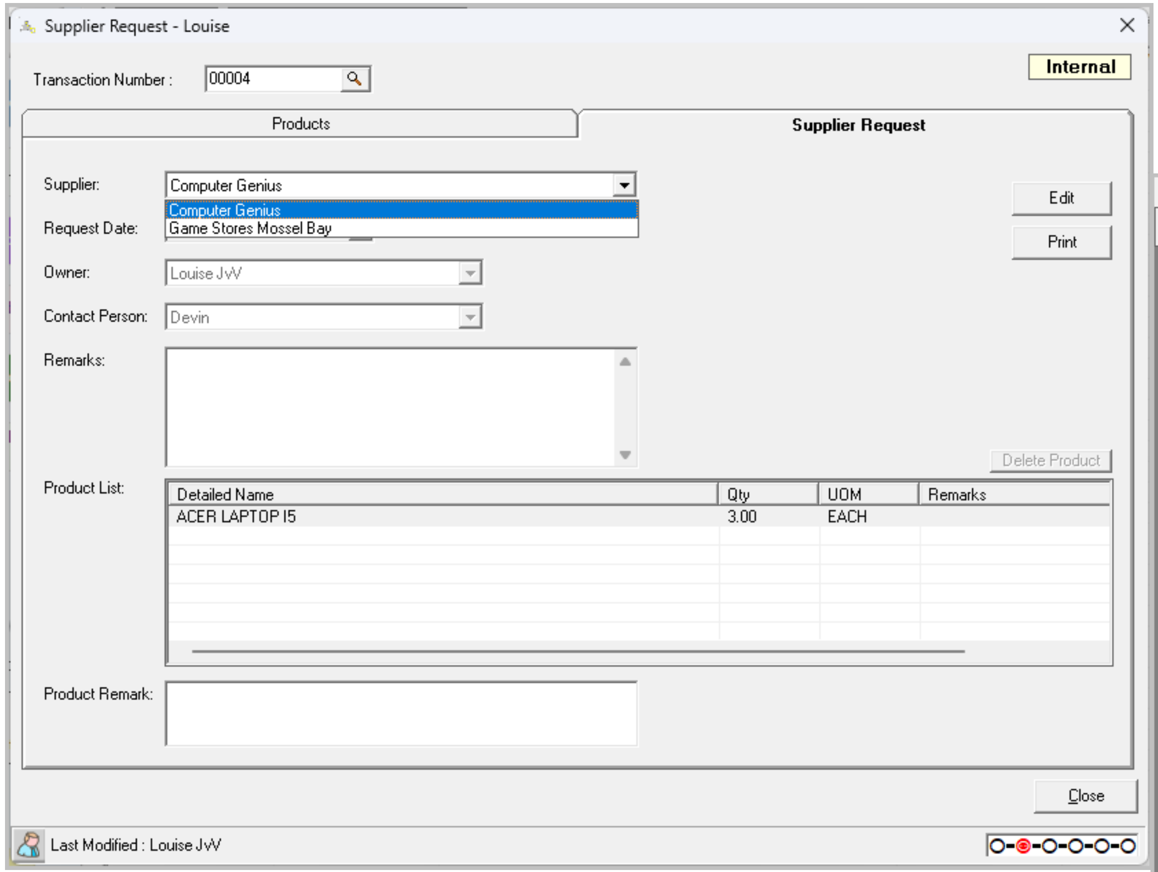
Internal | Supplier Requests

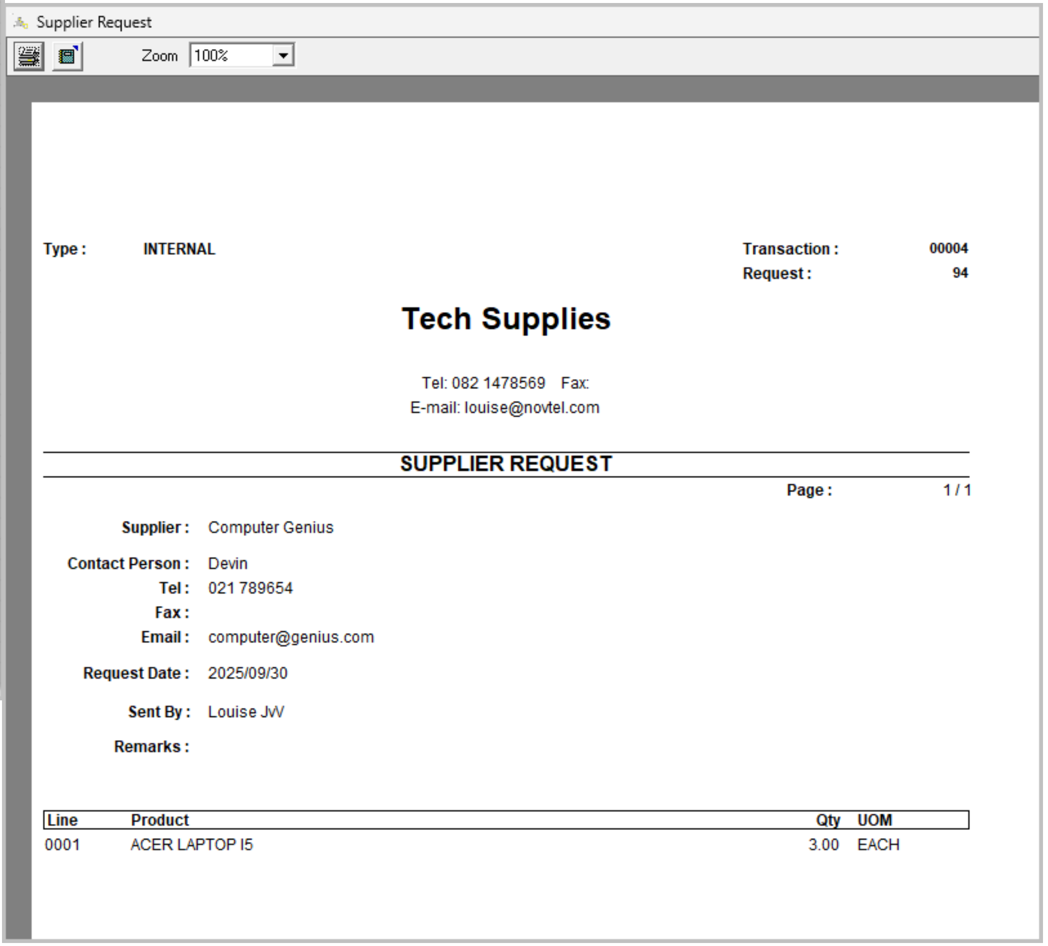
## Producing the Supplier Request

Per Supplier carrying the required product(s), a request can be produced and emailed

INTERNAL

- Department Request
- 2 Supplier Request
- Supplier Quote
- Supplier Order
- Supplier Invoice
- Department Delivery Note




Type : INTERNAL

Transaction : 00004

Request : 94

**Tech Supplies**

Tel: 082 1478569 Fax:

E-mail: louise@novtel.com

**SUPPLIER REQUEST**

Page : 1 / 1

**Supplier :** Computer Genius

**Contact Person :** Devin

**Tel :** 021 789654

**Fax :**

**Email :** computer@genius.com

**Request Date :** 2025/09/30

**Sent By :** Louise JvV

**Remarks :**

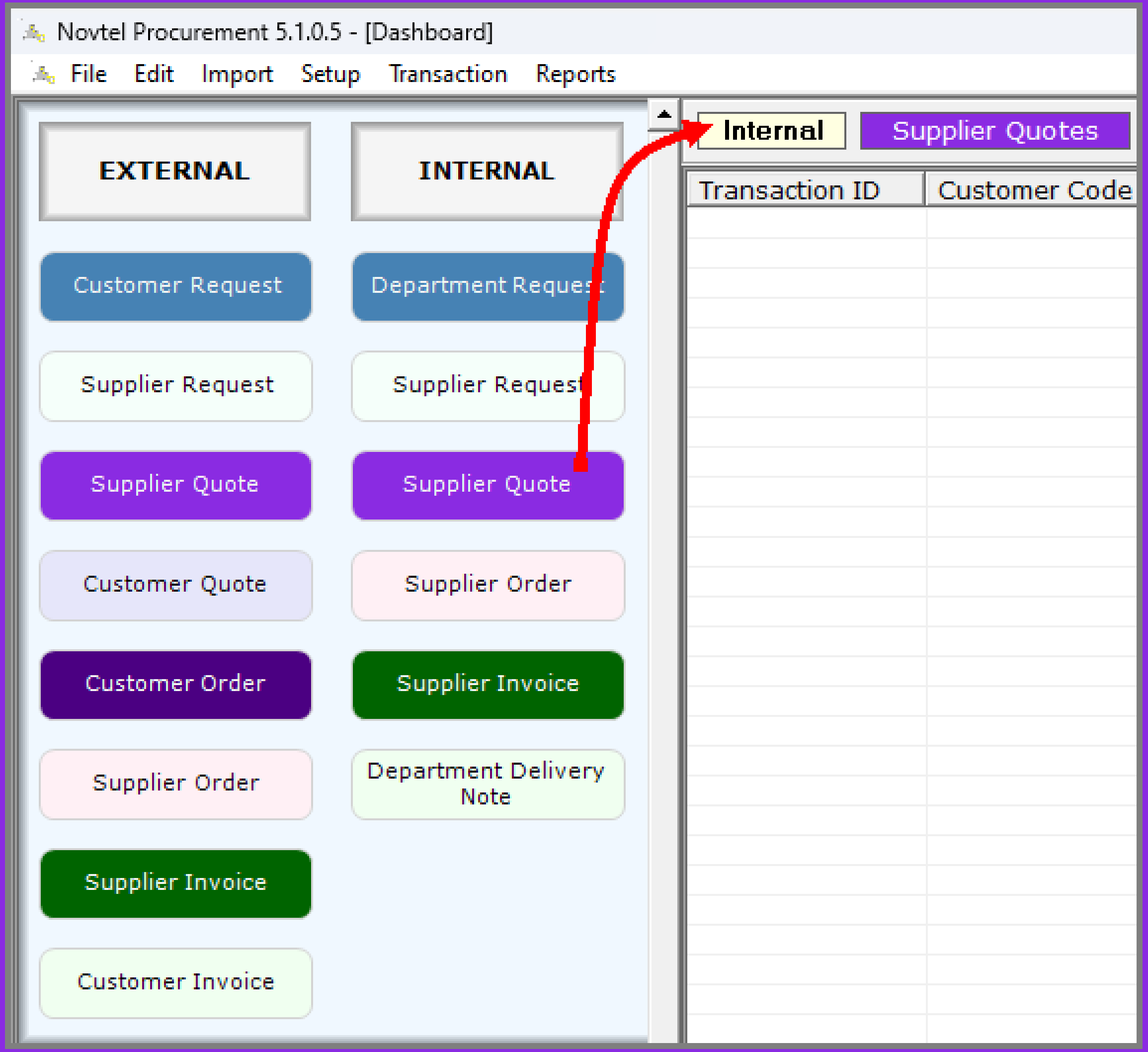
| Line | Product | Qty | UOM |
|---|---|---|---|
| 0001 | ACER LAPTOP I5 | 3.00 | EACH |

# Novtel

# Internal Procurement

Novtel Sage xero

## Transaction Level 3 – Supplier Quote

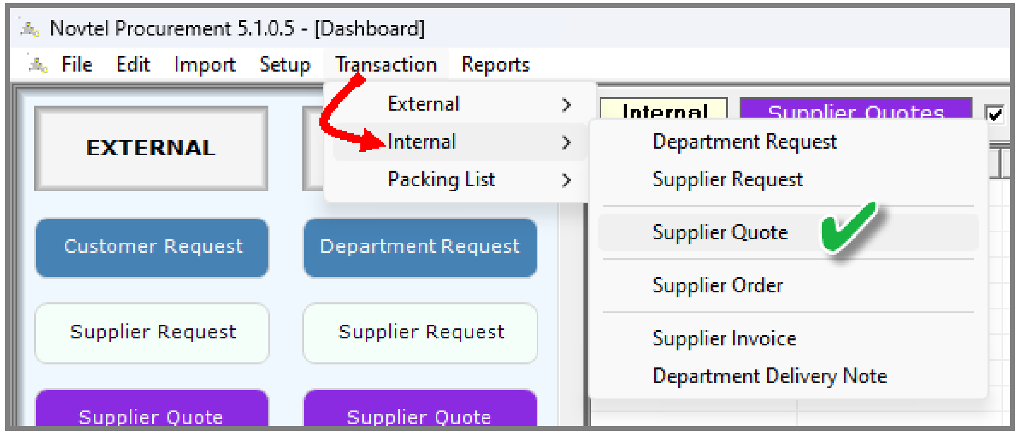


# Capturing the Supplier Quotes for Internal Orders



INTERNAL

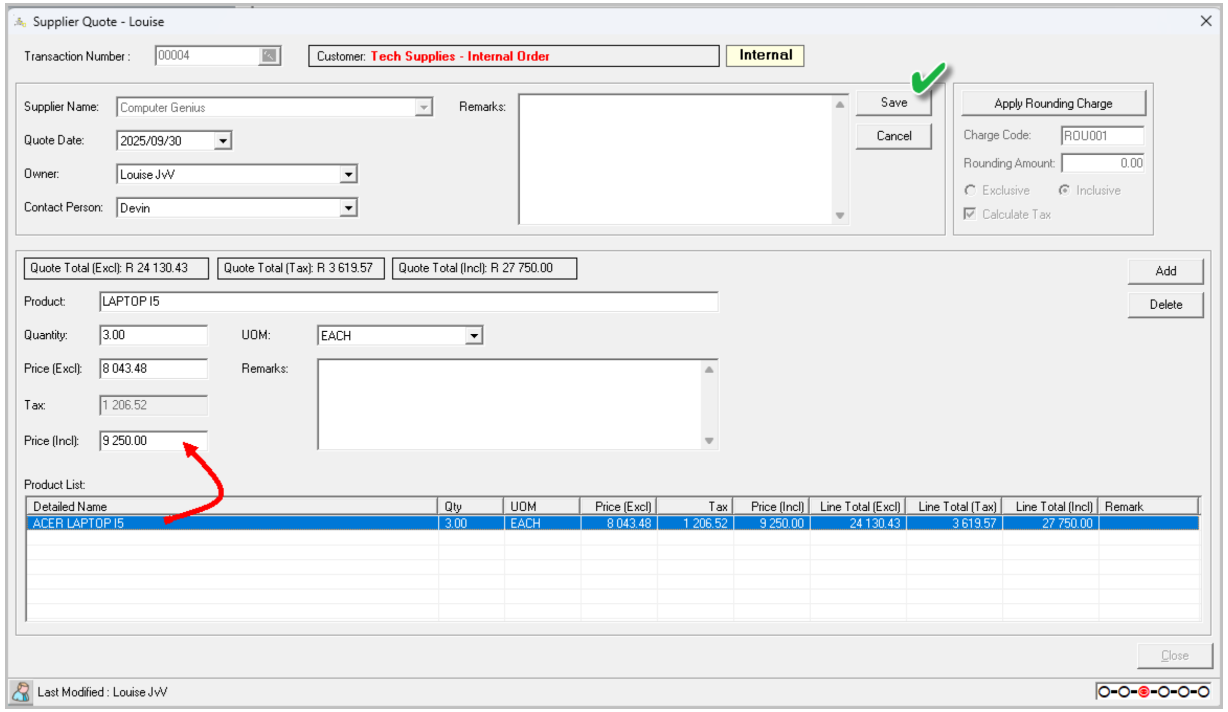
- Department Request
- Supplier Request
- 3 Supplier Quote
- Supplier Order
- Supplier Invoice
- Department Delivery Note




Step 3 in the Internal Procurement process entails that the Quotes received from the Suppliers to which Requests were sent, must be captured.

From the ‘Transaction’ menu, the ‘Internal - Supplier Quote’ option is selected.

The Transaction Number and Customer displayed at the top of the screen, is from the latest transaction created.

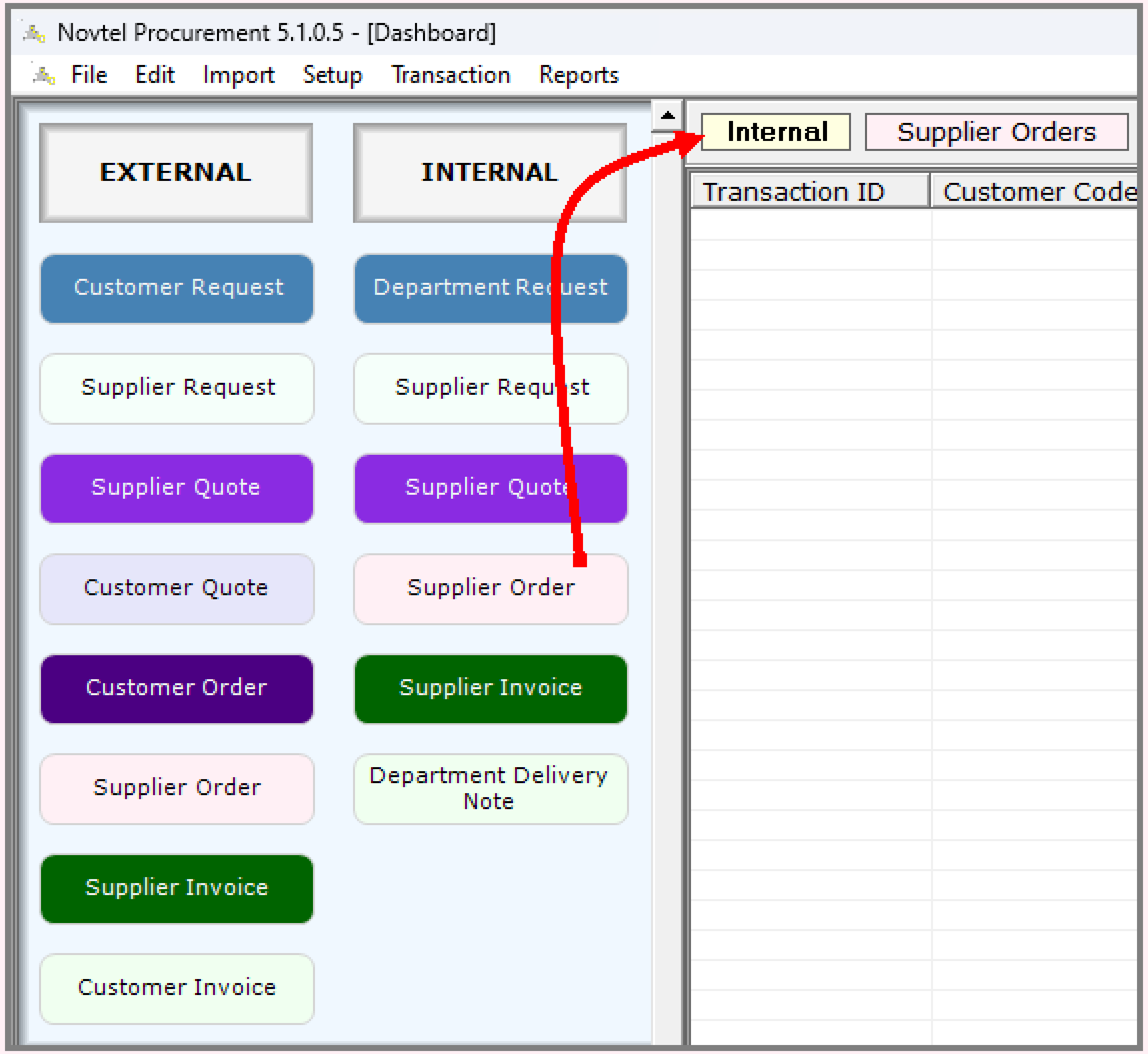



Clicking ‘Edit’ and selecting the product, the quoted price can be captured and the action saved.

Novtel

# Internal Procurement

## Transaction Level 4 – Supplier Order




Novtel Sage xero

Internal | Supplier Orders

# Placing the Supplier Order for Internal Procurement

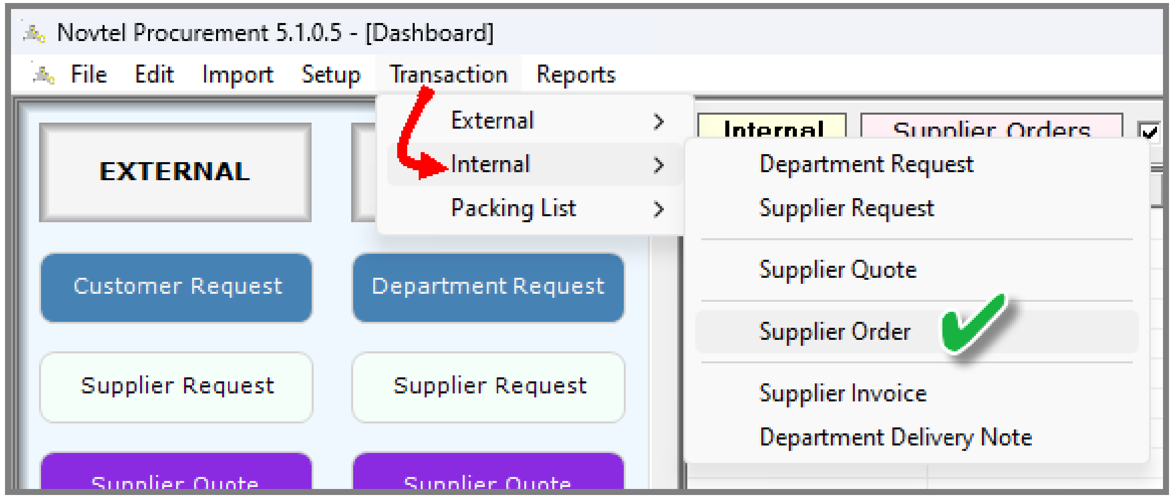
## Internal Process Step 4

INTERNAL

- Department Request
- Supplier Request
- Supplier Quote
- 4 Supplier Order
- Supplier Invoice
- Department Delivery Note

**Step 4 in the Internal Procurement process is to create the Supplier Order.**

**The order is created from the Supplier Quote obtained; captured and accepted.**




Clicking 'Transaction – Internal - Supplier Order', the Supplier Order screen is accessed.

By default, the latest transaction is displayed.

If a different transaction is to be accessed, the required transaction number is to be searched for and selected.

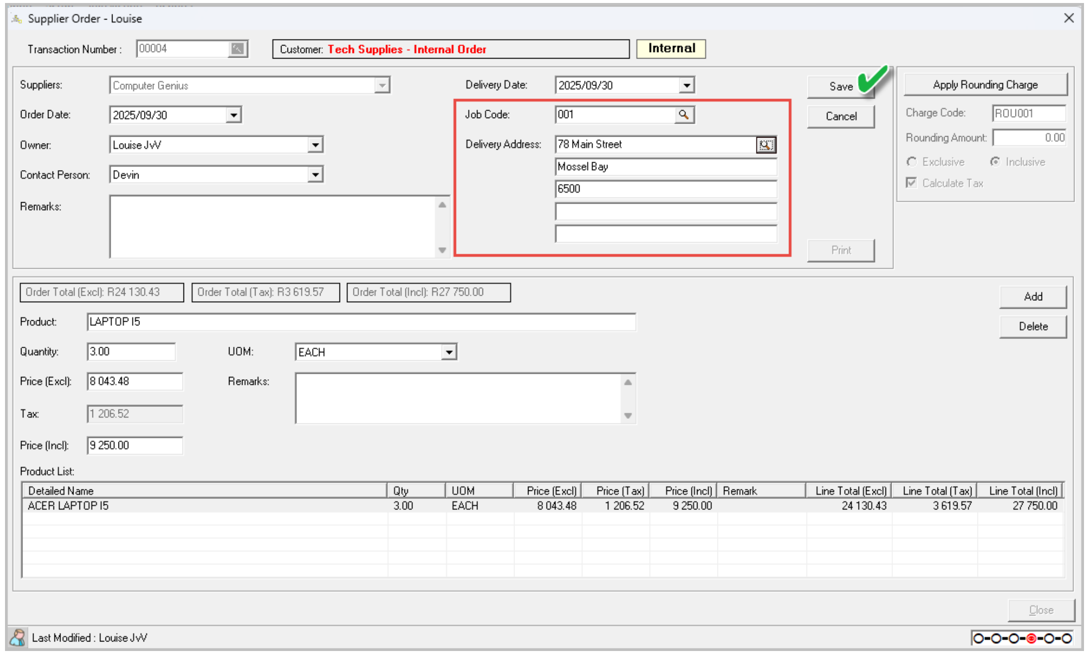
# Placing the Supplier Order for Internal Procurement

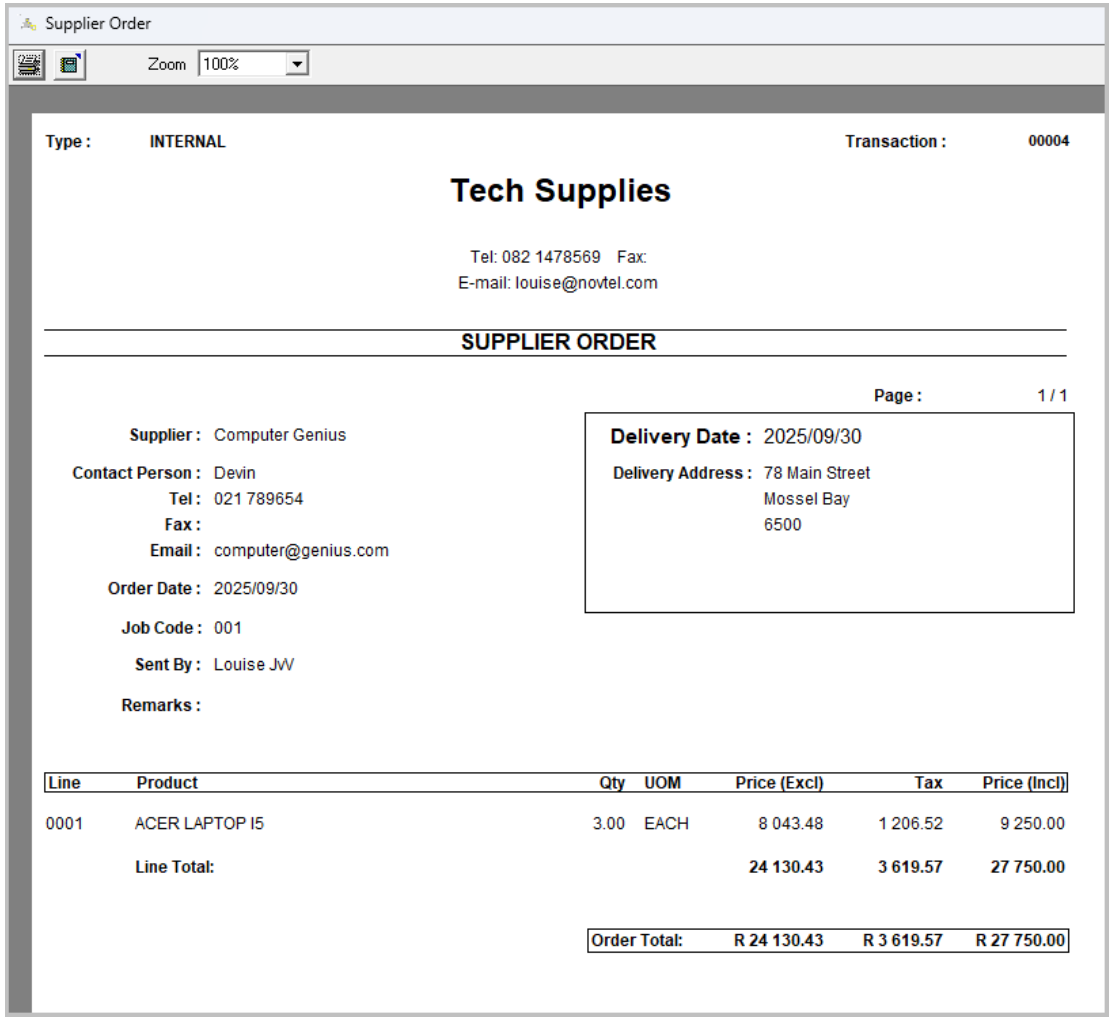
## Internal Process Step 4

By Editing the Supplier Order and selecting the Delivery Address, and saving the settings, the Supplier Order can be printed to PDF and emailed to the Supplier.

**INTERNAL**

- Department Request
- Supplier Request
- Supplier Quote
- 4 Supplier Order
- Supplier Invoice
- Department Delivery Note

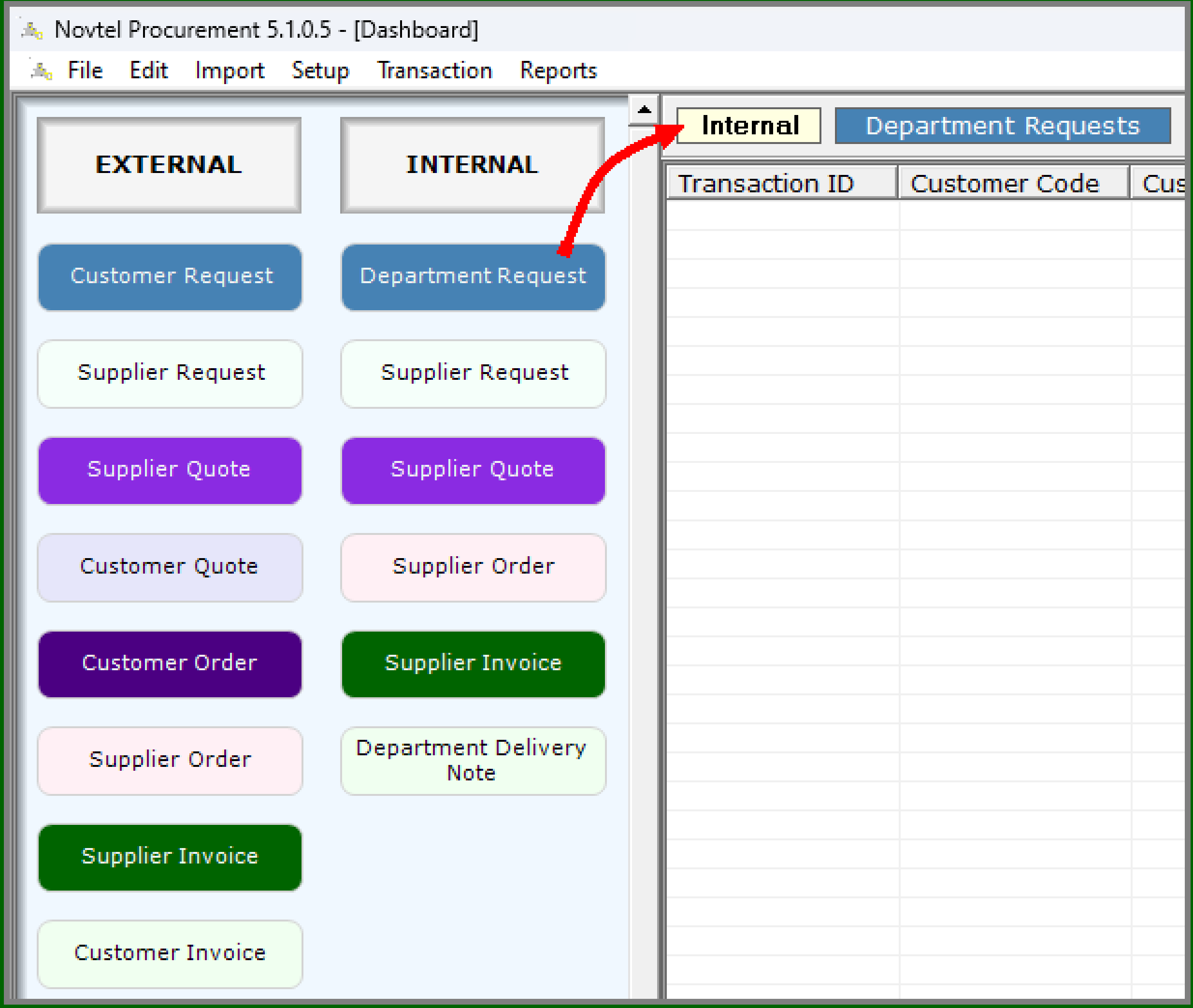


Novtel

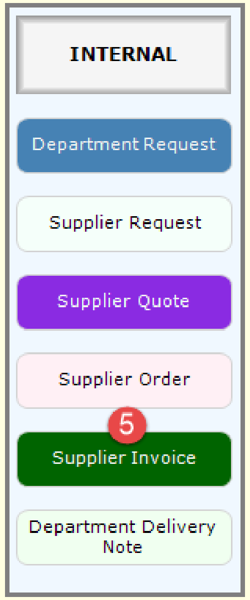
# Internal Procurement

## Transaction Level 5 – Supplier Invoice



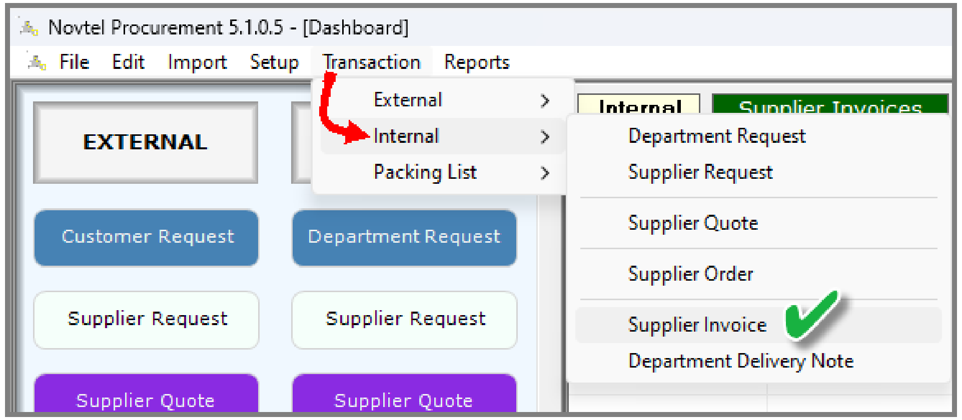

Novtel

# Internal Process Step 5




**Internal** **Supplier Invoices**

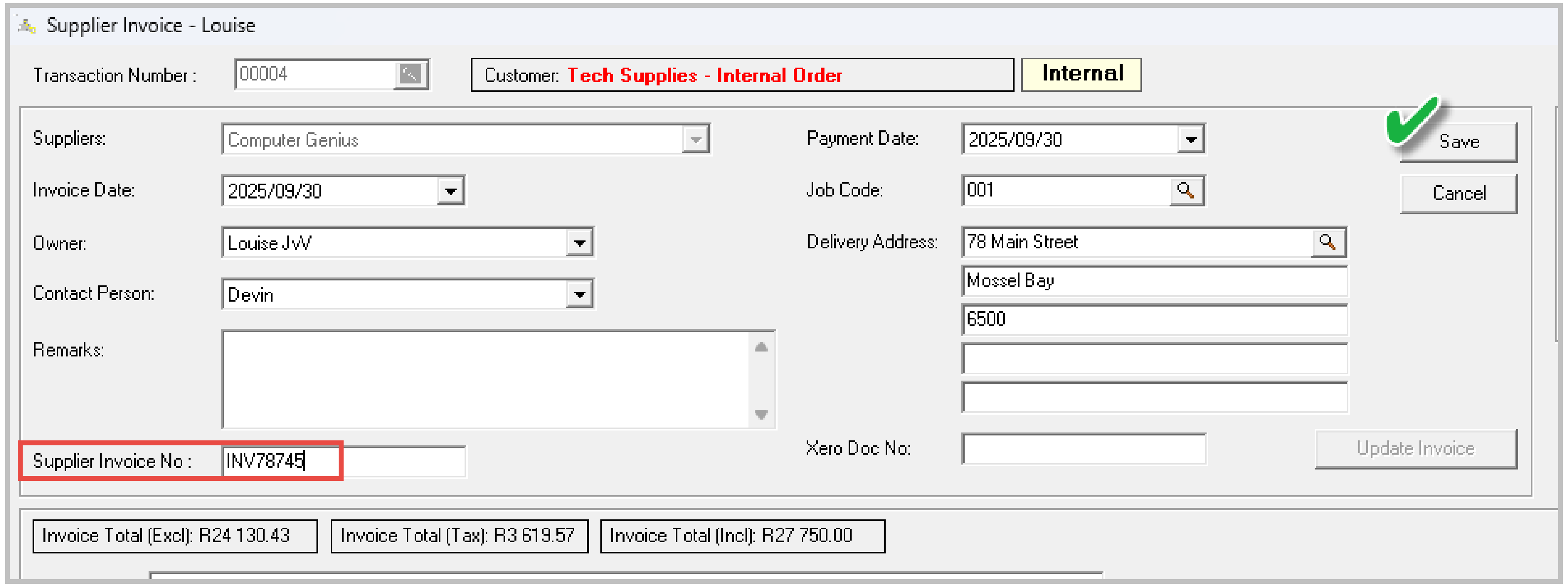
# Capturing the Supplier Invoice




The second last step in the internal procurement process, is to capture the Supplier Invoice and updating it to the linked financial system.

The process is started by clicking 'Transaction – Internal - Supplier Invoice'.

The Supplier Order must be 'Edited' and the Supplier Invoice Number captured before saving the action.



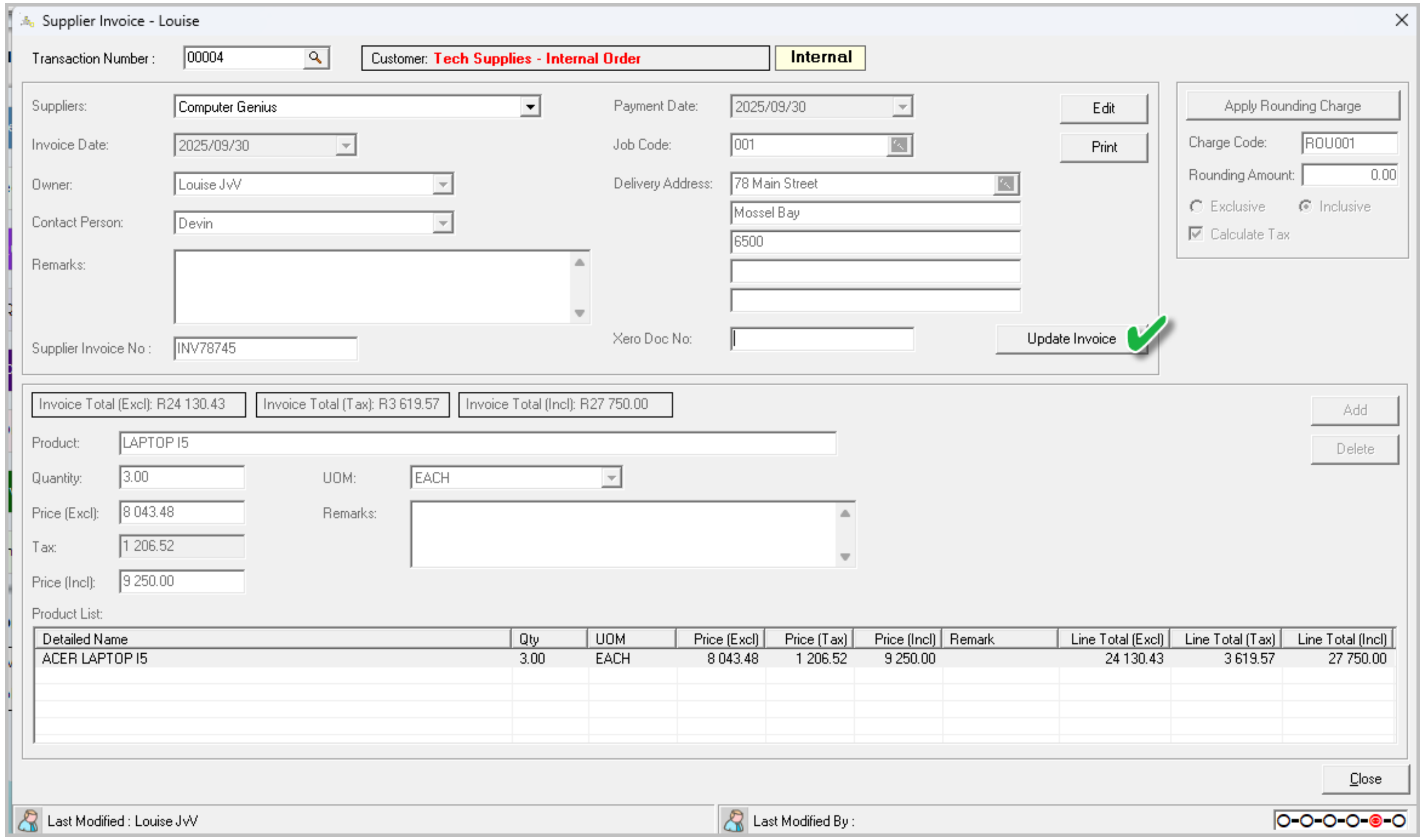
Internal | Supplier Invoices

# Capturing the Supplier Invoice

# Internal Process Step 5

**INTERNAL**

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note




The invoice must now be updated to the linked financial system by clicking the ‘Update Invoice’ button.

Internal | Supplier Invoices

# Capturing the Supplier Invoice

## Internal Process Step 5

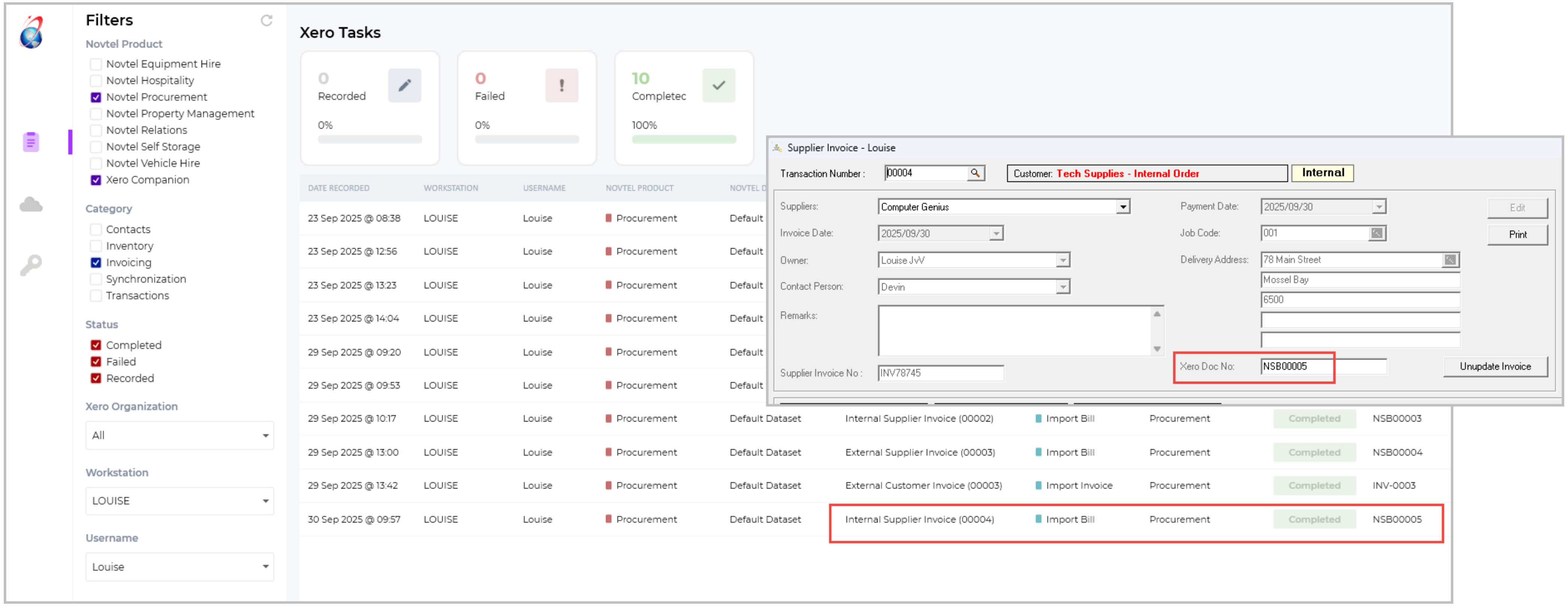
## Integration

When integrated with Xero, the Companion App imports the transaction as follows:

- The Novtel Source is an Internal Supplier Invoice;
- The Xero Task Type is 'Import Bill';
- And the Reference is the document number as allocated by Novtel.

**INTERNAL**

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note

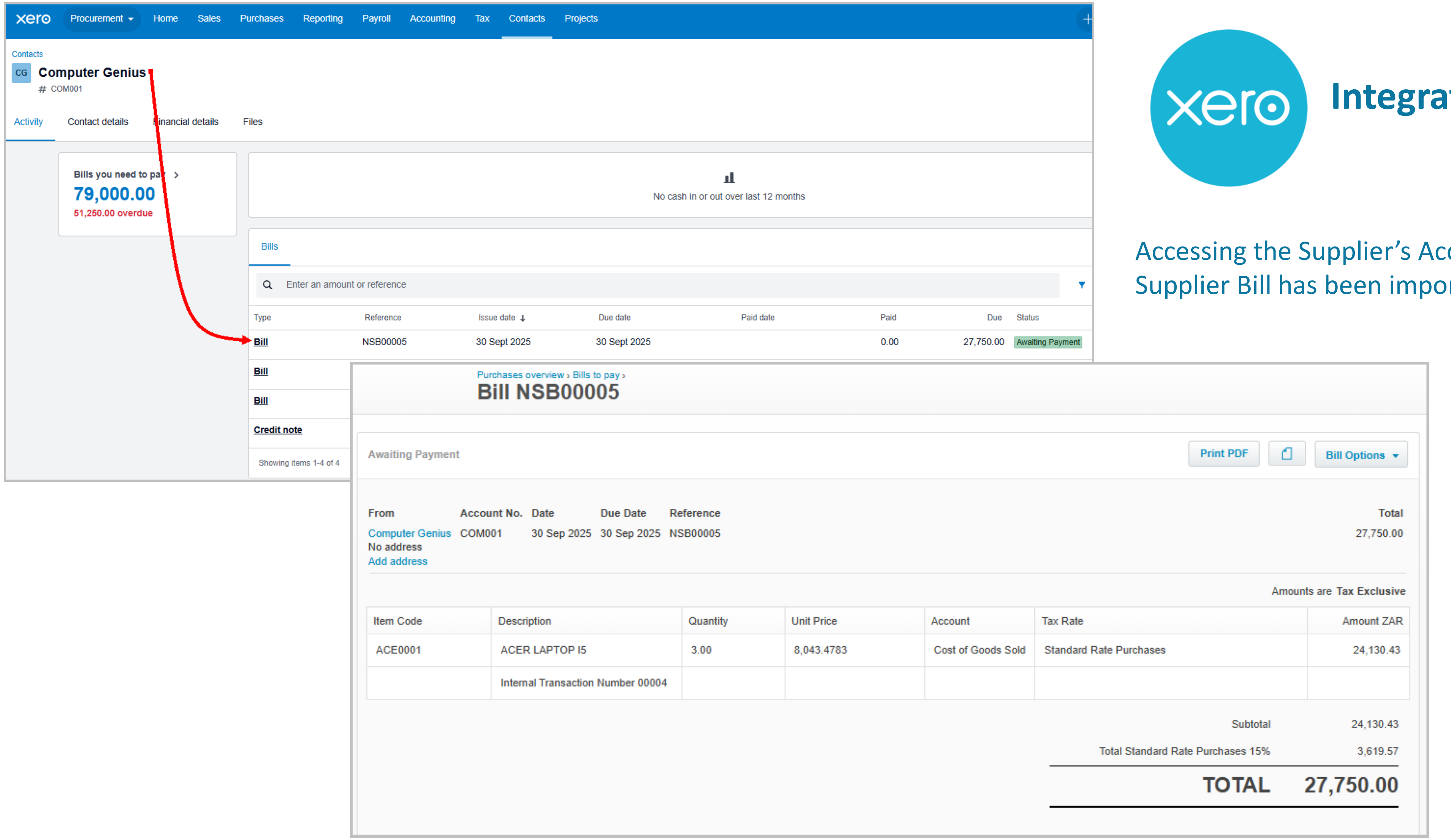


# Capturing the Supplier Invoice

## Internal Process Step 5

**INTERNAL**

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note




**Integration**

Accessing the Supplier's Account in Xero, the Supplier Bill has been imported successfully.

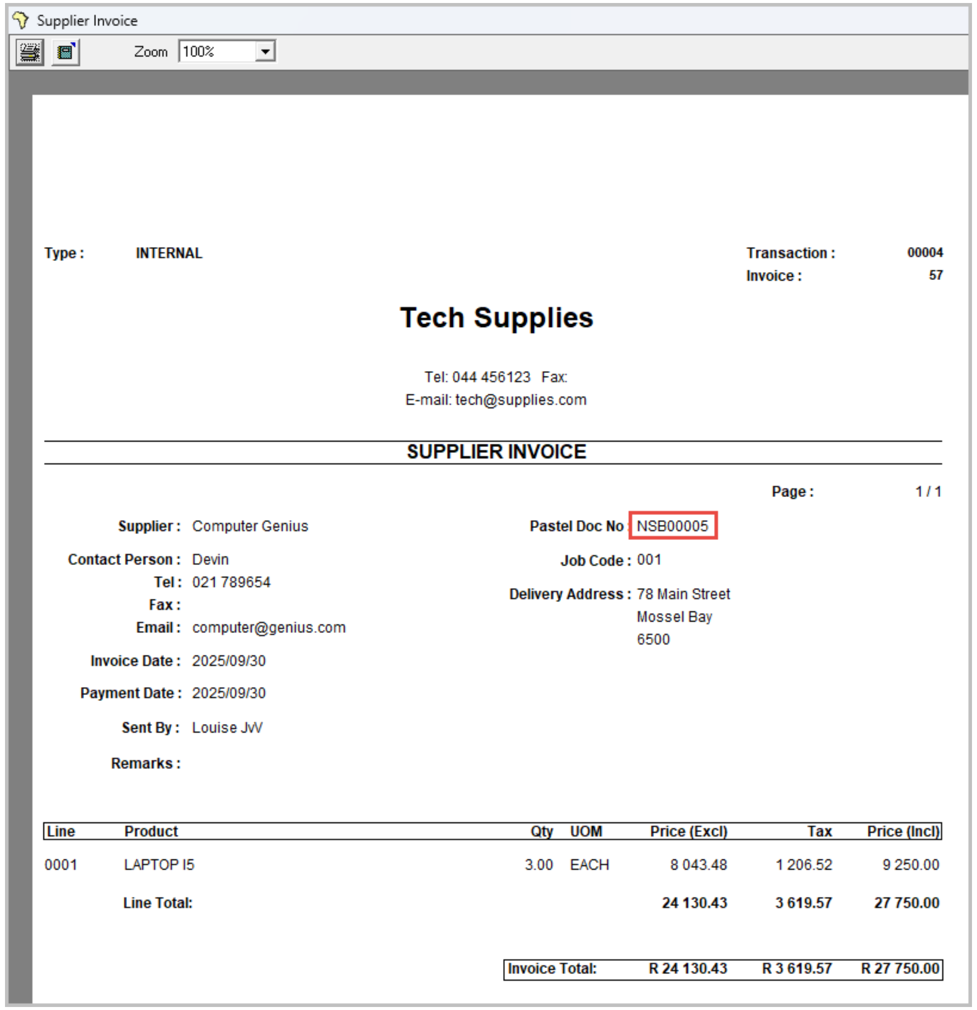
Internal | Supplier Invoices

# Capturing the Supplier Invoice

# Internal Process Step 5

**INTERNAL**

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note



Supplier Invoice

Zoom 100%

Type : INTERNAL

Transaction : 00004
Invoice : 57

**Tech Supplies**

Tel: 044 456123 Fax:
E-mail: tech@supplies.com

**SUPPLIER INVOICE**

Page : 1 / 1

Supplier : Computer Genius
Contact Person : Devin
Tel : 021 789654
Fax :
Email : computer@genius.com
Invoice Date : 2025/09/30
Payment Date : 2025/09/30
Sent By : Louise JvV
Remarks :

Pastel Doc No NSB00005
Job Code : 001
Delivery Address : 78 Main Street
Mossel Bay
6500

| Line | Product | Qty | UOM | Price (Excl) | Tax | Price (Incl) |
|---|---|---|---|---|---|---|
| 0001 | LAPTOP I5 | 3.00 | EACH | 8 043.48 | 1 206.52 | 9 250.00 |
| | **Line Total:** | | | **24 130.43** | **3 619.57** | **27 750.00** |
| | Invoice Total: | | | R 24 130.43 | R 3 619.57 | R 27 750.00 |

The Novtel Invoice will also indicate the allocated Invoice Number as passed to Xero.

# Capturing the Supplier Invoice

## Internal Process Step 5

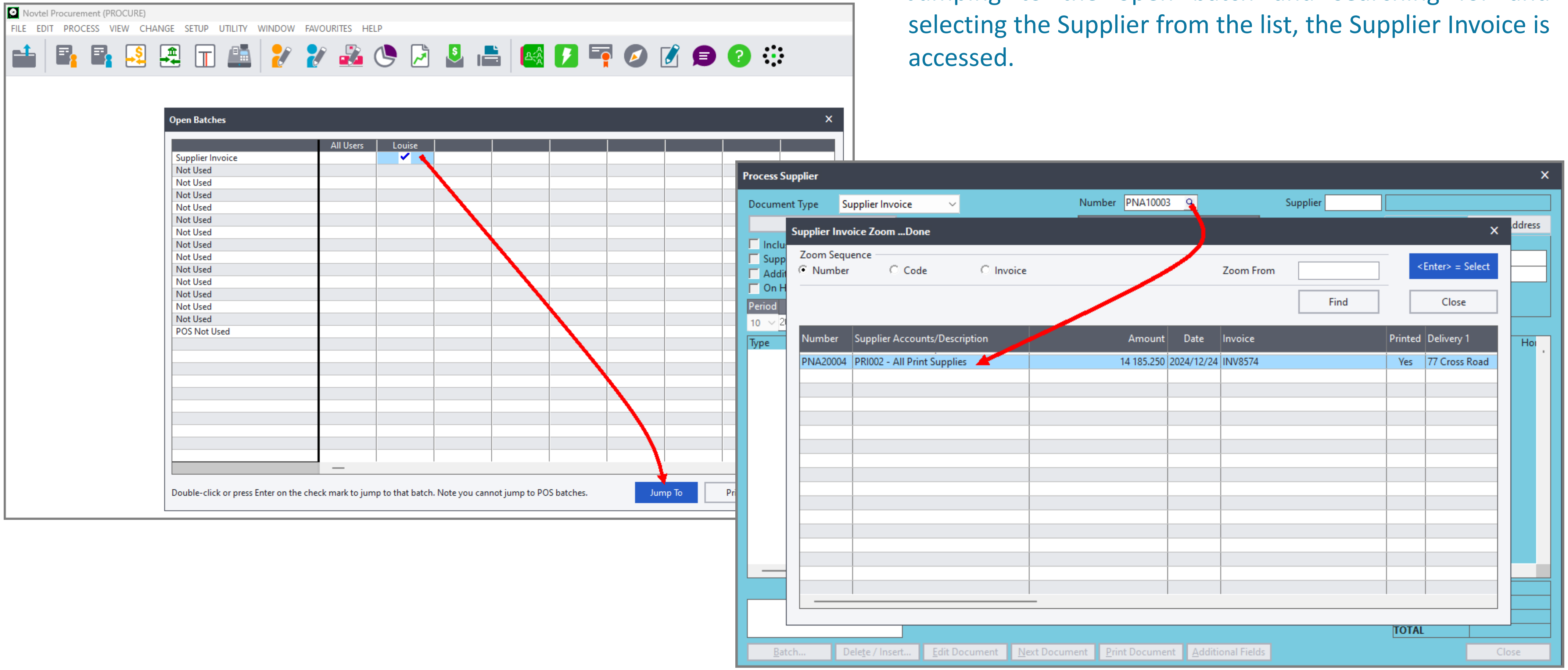
Sage Integration

Integrated with Sage Pastel, the Supplier Invoice in Sage 50c Pastel Partner is now present in an open batch.

Jumping to the open batch and searching for and selecting the Supplier from the list, the Supplier Invoice is accessed.

INTERNAL

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note



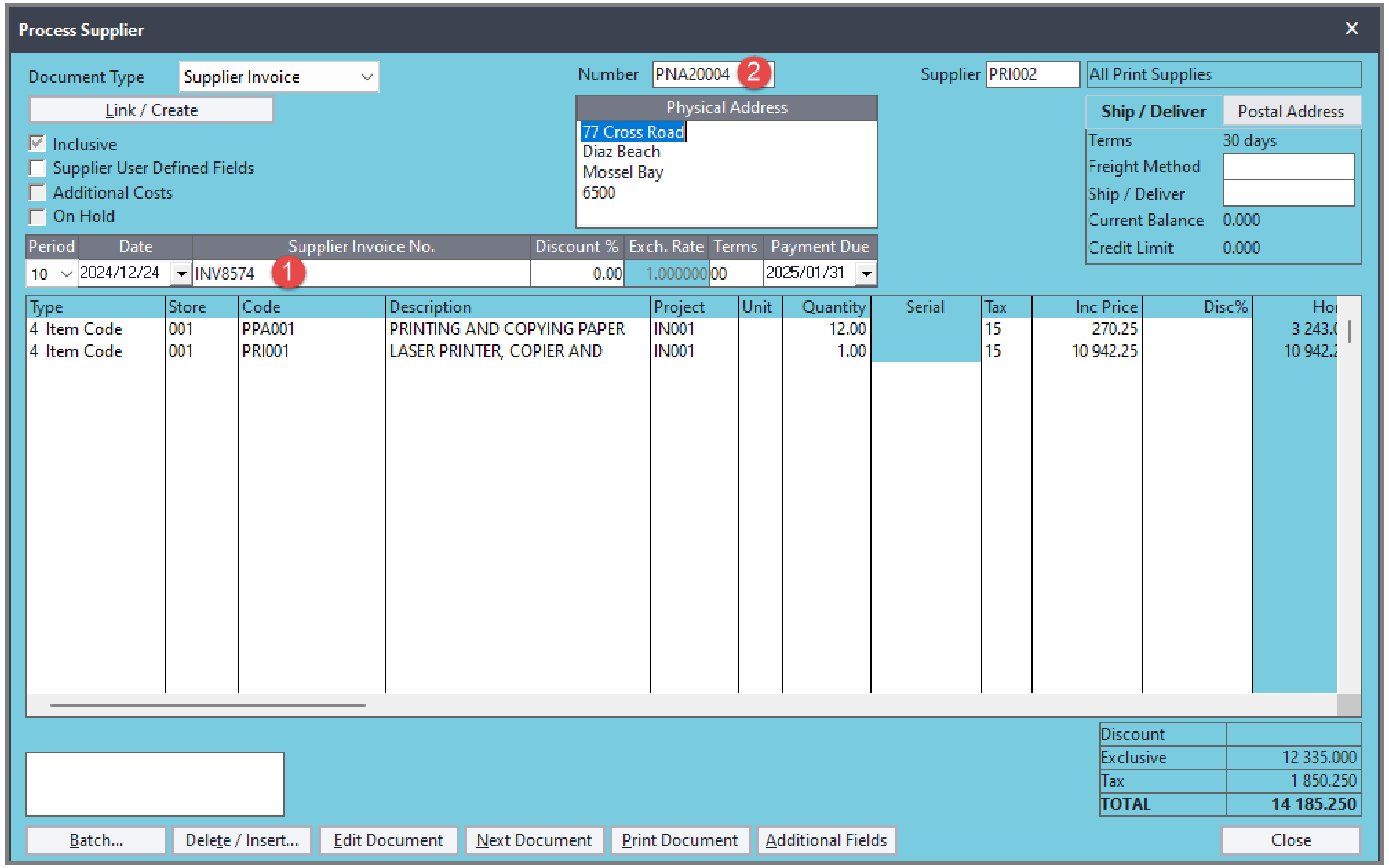
Internal | Supplier Invoices

# Capturing the Supplier Invoice

# Internal Process Step 5

INTERNAL

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note




Sage Integration

1. The Supplier Invoice is displayed as follows, and indicating the Supplier Invoice Number (INV8574) as captured to Novtel.

2. The Pastel Document Number corresponds with the number allocated to the Supplier Invoice Document in Novtel. (PNA2004)

# Capturing the Supplier Invoice

## Internal Process Step 5

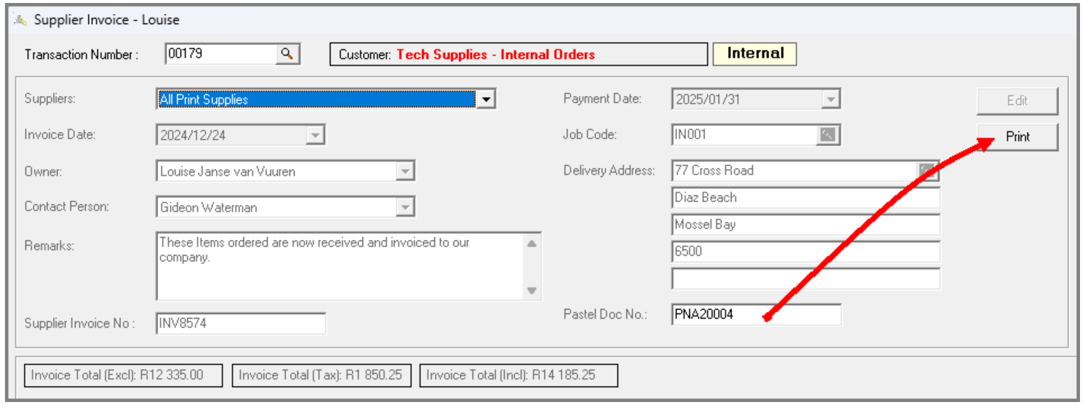
INTERNAL

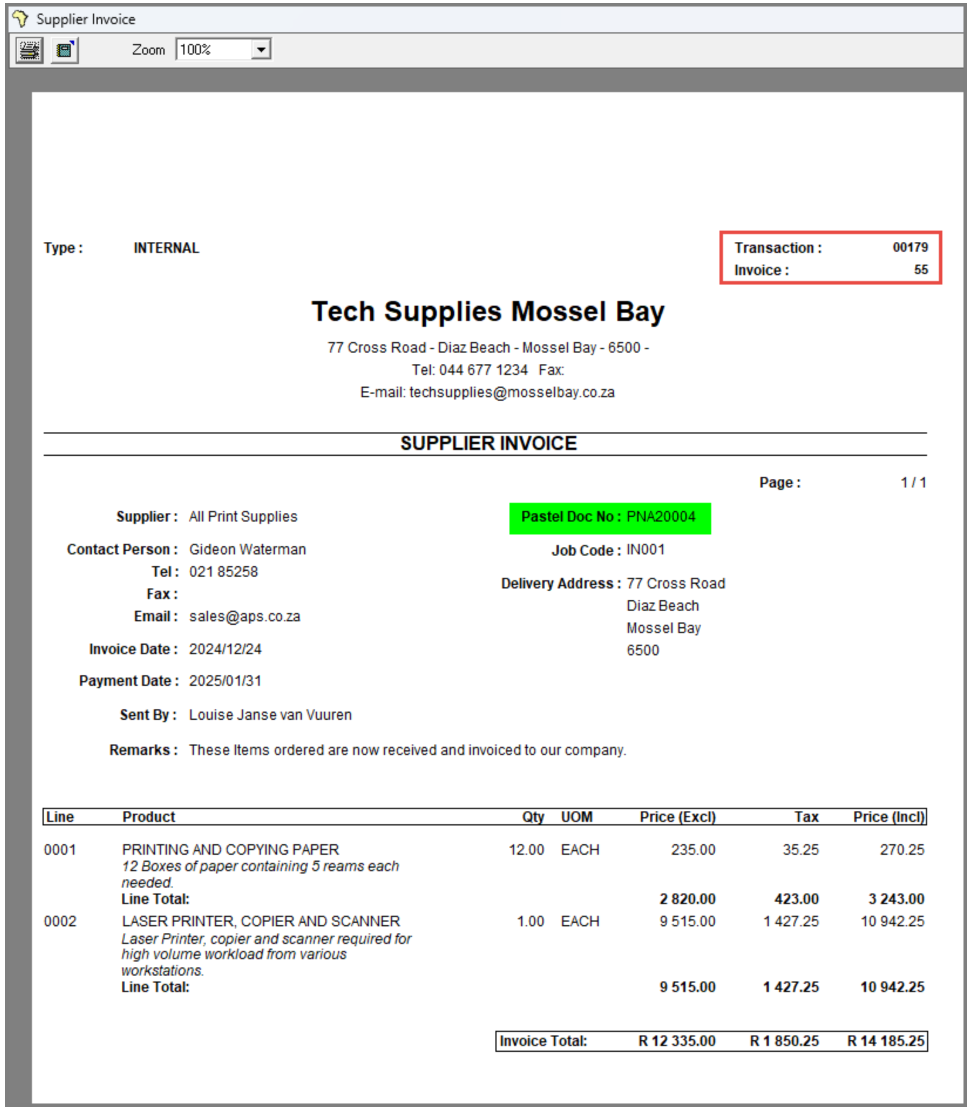
- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- 5 Supplier Invoice
- Department Delivery Note

## Sage Integration

The Pastel Document Number has been created and inserted on this Supplier Invoice screen.

To access the Supplier Invoice Document, click 'Print'.



Supplier Invoice

Zoom 100%

Type : INTERNAL

Transaction : 00179
Invoice : 55

**Tech Supplies Mossel Bay**

77 Cross Road - Diaz Beach - Mossel Bay - 6500 -
Tel: 044 677 1234 Fax:
E-mail: techsupplies@mosselbay.co.za

**SUPPLIER INVOICE**

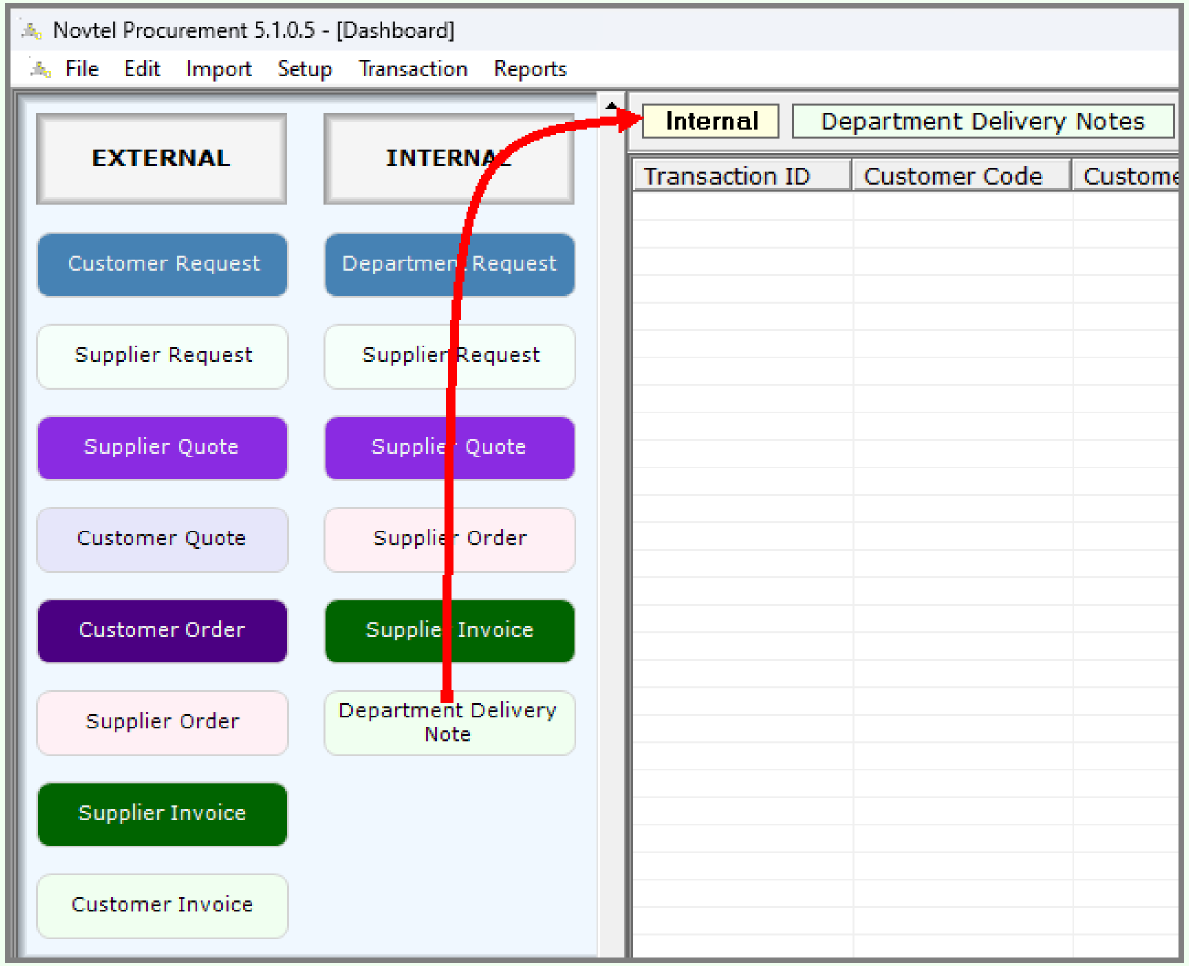
Page : 1 / 1

Supplier : All Print Supplies
Pastel Doc No : PNA20004
Contact Person : Gideon Waterman
Job Code : IN001
Tel : 021 85258
Fax :
Email : sales@aps.co.za
Delivery Address : 77 Cross Road, Diaz Beach, Mossel Bay, 6500
Invoice Date : 2024/12/24
Payment Date : 2025/01/31
Sent By : Louise Janse van Vuuren
Remarks : These Items ordered are now received and invoiced to our company.

| Line | Product | Qty | UOM | Price (Excl) | Tax | Price (Incl) |
|---|---|---|---|---|---|---|
| 0001 | PRINTING AND COPYING PAPER<br>*12 Boxes of paper containing 5 reams each needed.* | 12.00 | EACH | 235.00 | 35.25 | 270.25 |
| | **Line Total:** | | | **2 820.00** | **423.00** | **3 243.00** |
| 0002 | LASER PRINTER, COPIER AND SCANNER<br>*Laser Printer, copier and scanner required for high volume workload from various workstations.* | 1.00 | EACH | 9 515.00 | 1 427.25 | 10 942.25 |
| | **Line Total:** | | | **9 515.00** | **1 427.25** | **10 942.25** |
| | **Invoice Total:** | | | **R 12 335.00** | **R 1 850.25** | **R 14 185.25** |

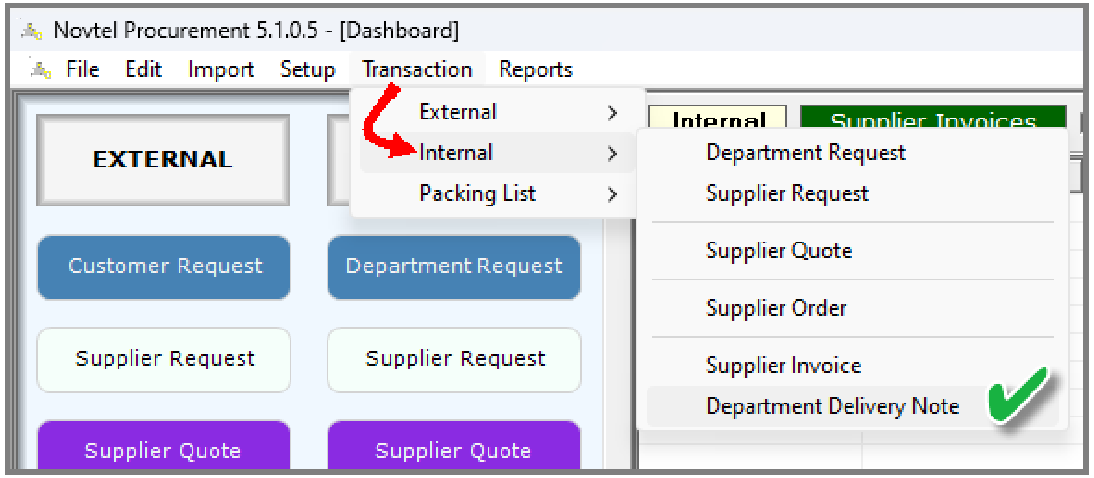
# Internal Procurement

## Transaction Level 6 – Department Delivery Note



# Internal Process Step 6

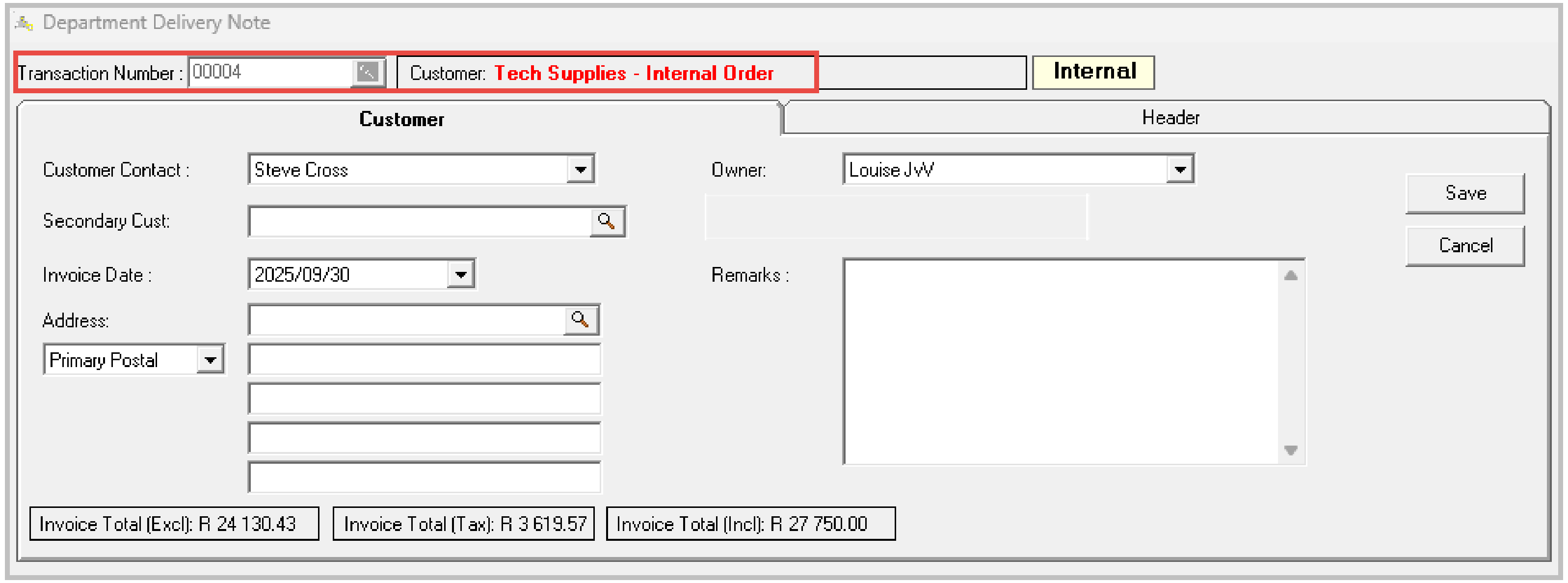
# Issuing the Department Delivery Note


**Step 6 is the final step in the Internal Procurement Process and entails that the Department Delivery Note is issued.**

From the 'Transaction – Internal – Department Delivery Note' menu option, the required transaction number is to be searched for and selected.

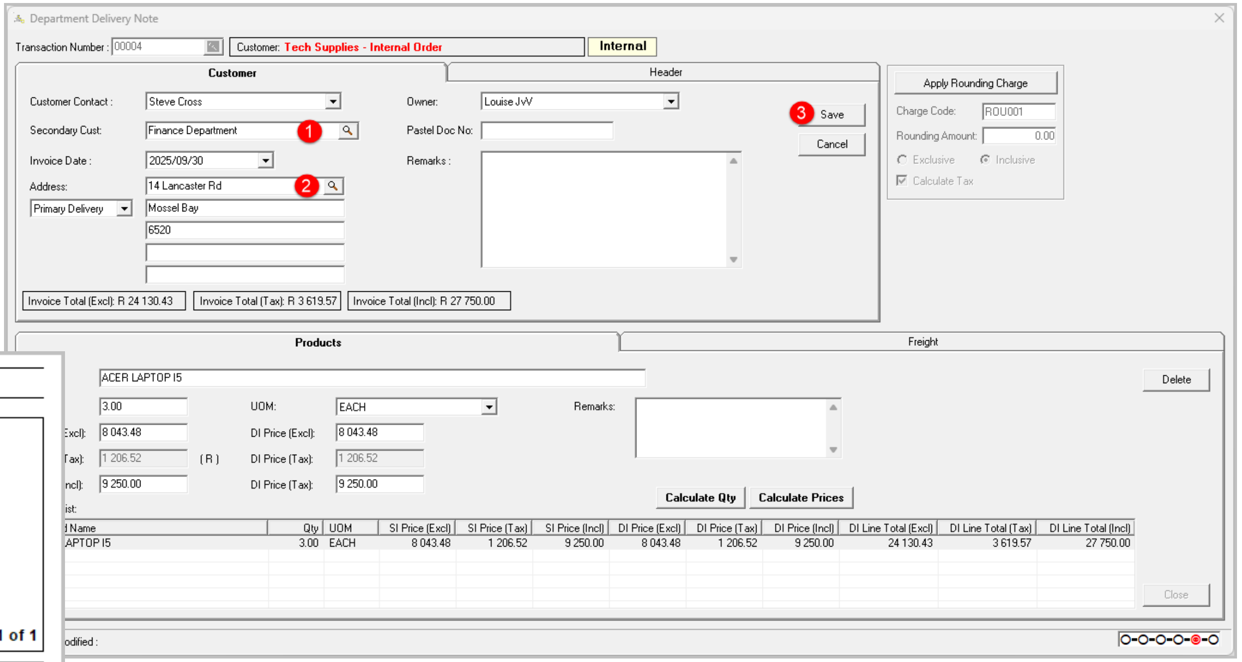
By default, the latest transaction number linked to the current 'Supplier Invoice' transaction level, is displayed.

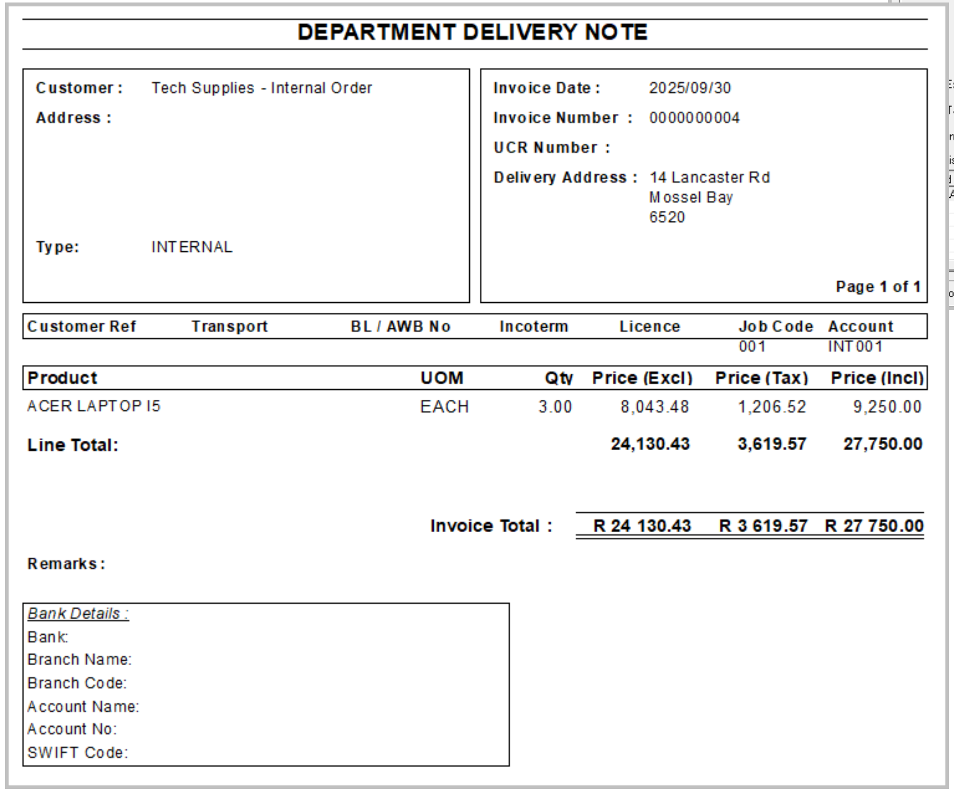


# Issuing the Department Delivery Note

## Internal Process Step 6

1. In this case, the Secondary Customer will be selected as the items are bought for this department.
2. The Primary Customer's Delivery Address is used since this department is within the same building.
3. And the changes are saved.



## DEPARTMENT DELIVERY NOTE

**Customer :** Tech Supplies - Internal Order
**Address :**

**Type:** INTERNAL

**Invoice Date :** 2025/09/30
**Invoice Number :** 0000000004
**UCR Number :**
**Delivery Address :** 14 Lancaster Rd
Mossel Bay
6520

**Page 1 of 1**

| Customer Ref | Transport | BL / AWB No | Incoterm | Licence | Job Code | Account |
|---|---|---|---|---|---|---|
| | | | | | 001 | INT001 |

| Product | UOM | Qty | Price (Excl) | Price (Tax) | Price (Incl) |
|---|---|---|---|---|---|
| ACER LAPTOP I5 | EACH | 3.00 | 8,043.48 | 1,206.52 | 9,250.00 |
| **Line Total:** | | | **24,130.43** | **3,619.57** | **27,750.00** |

**Invoice Total :** **R 24 130.43** **R 3 619.57** **R 27 750.00**

**Remarks :**

*Bank Details :*
Bank:
Branch Name:
Branch Code:
Account Name:
Account No:
SWIFT Code:

**INTERNAL**

- Department Request
- Supplier Request
- Supplier Quote
- Supplier Order
- Supplier Invoice
- Department Delivery Note 6

The Internal Department Delivery Note can now be produced.

Novtel Sage xero

https://x.com/NovtelSoftware

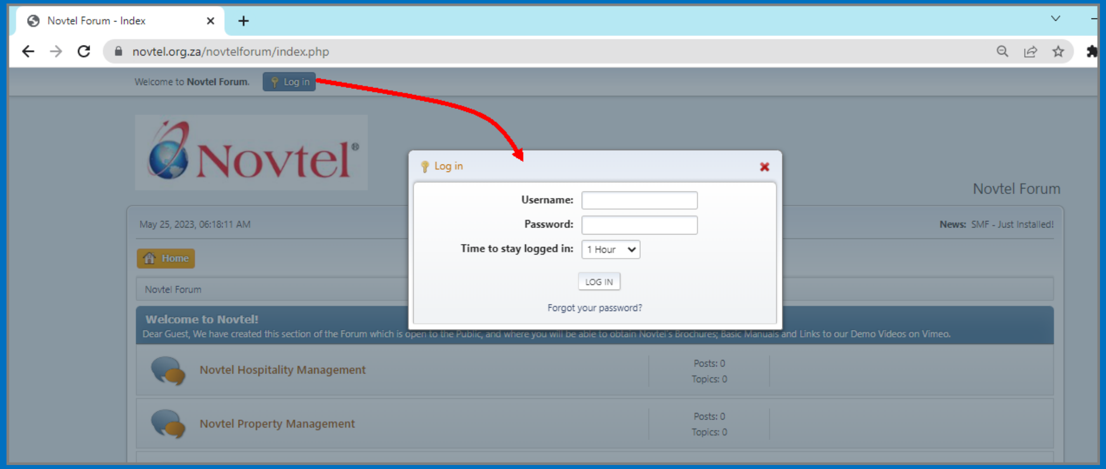
www.linkedin.com/company/novtel-software-training

Novtel

# 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.





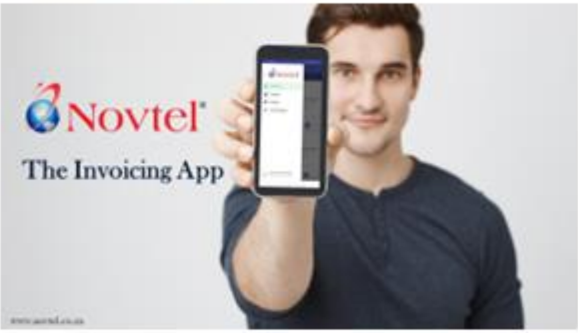















www.novtel.com

sales@novtel.com

086 166 8835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