



Novtel Procurement



Image by senivpetro on Freepik



Sage

The Basics of Novtel Procurement



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Novtel

Procurement

The Basics of Novtel Procurement

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Novtel

Procurement



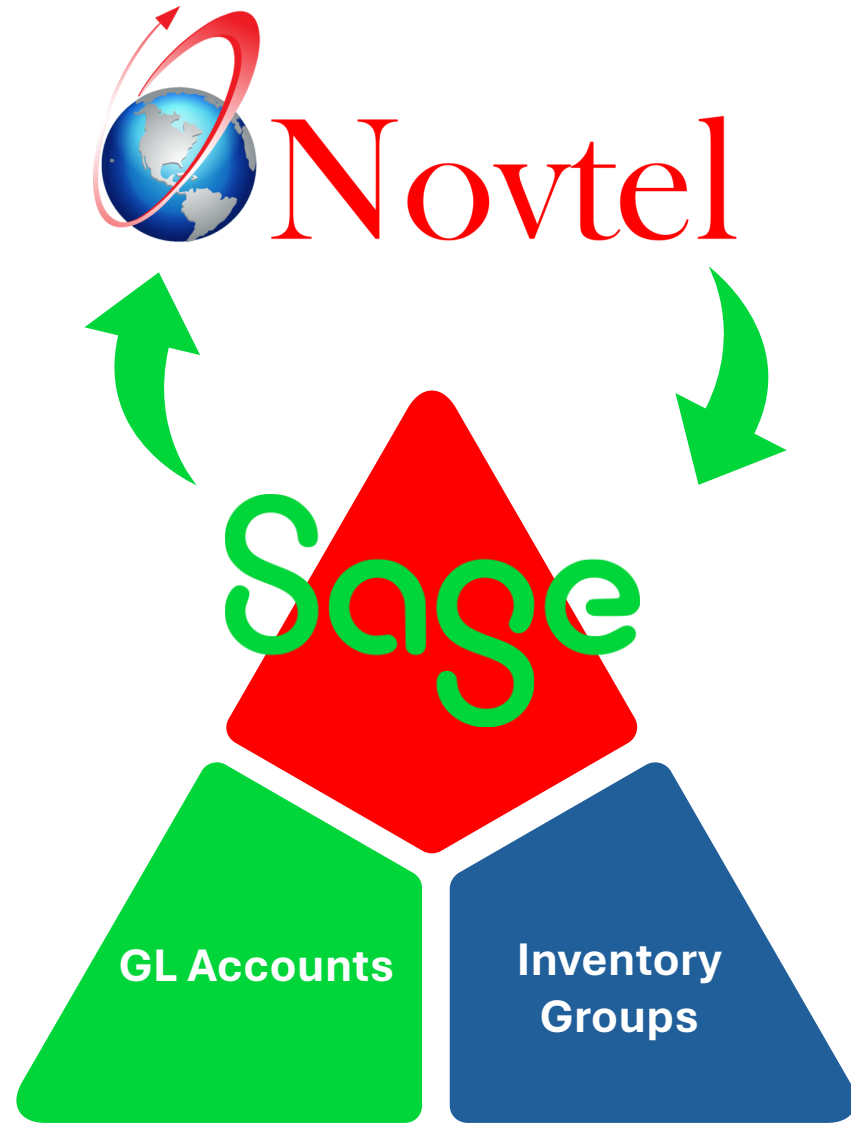
1

Introduction



Sage

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.



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.

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.

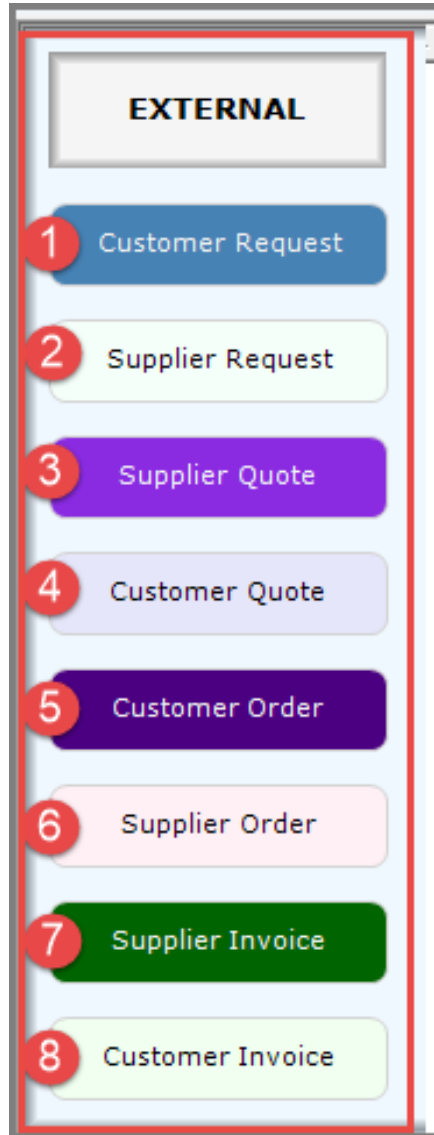
This can be direct, such as raw materials, or indirect, such as office supplies.

☐ 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.



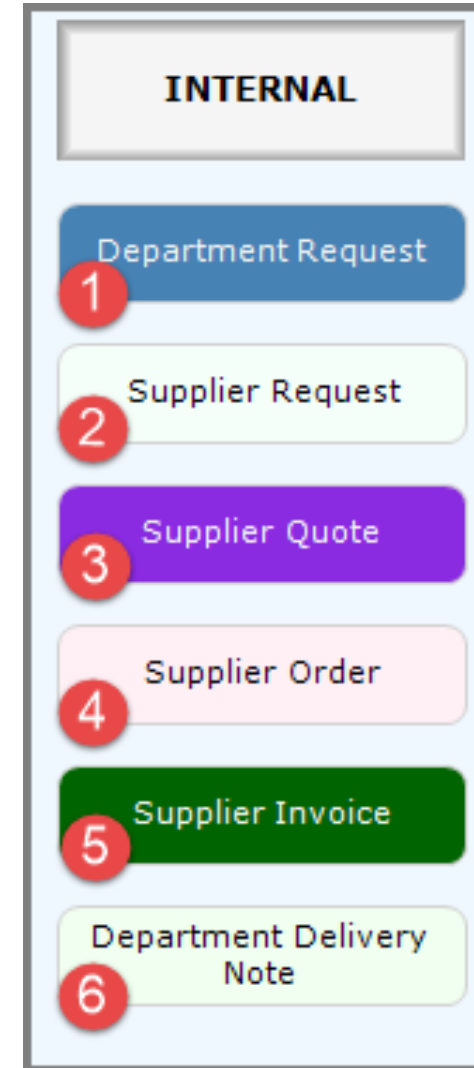
In Novtel, there are 2 process cycles which can be accessed, namely:

➤ **External Procurement (8 Steps)**

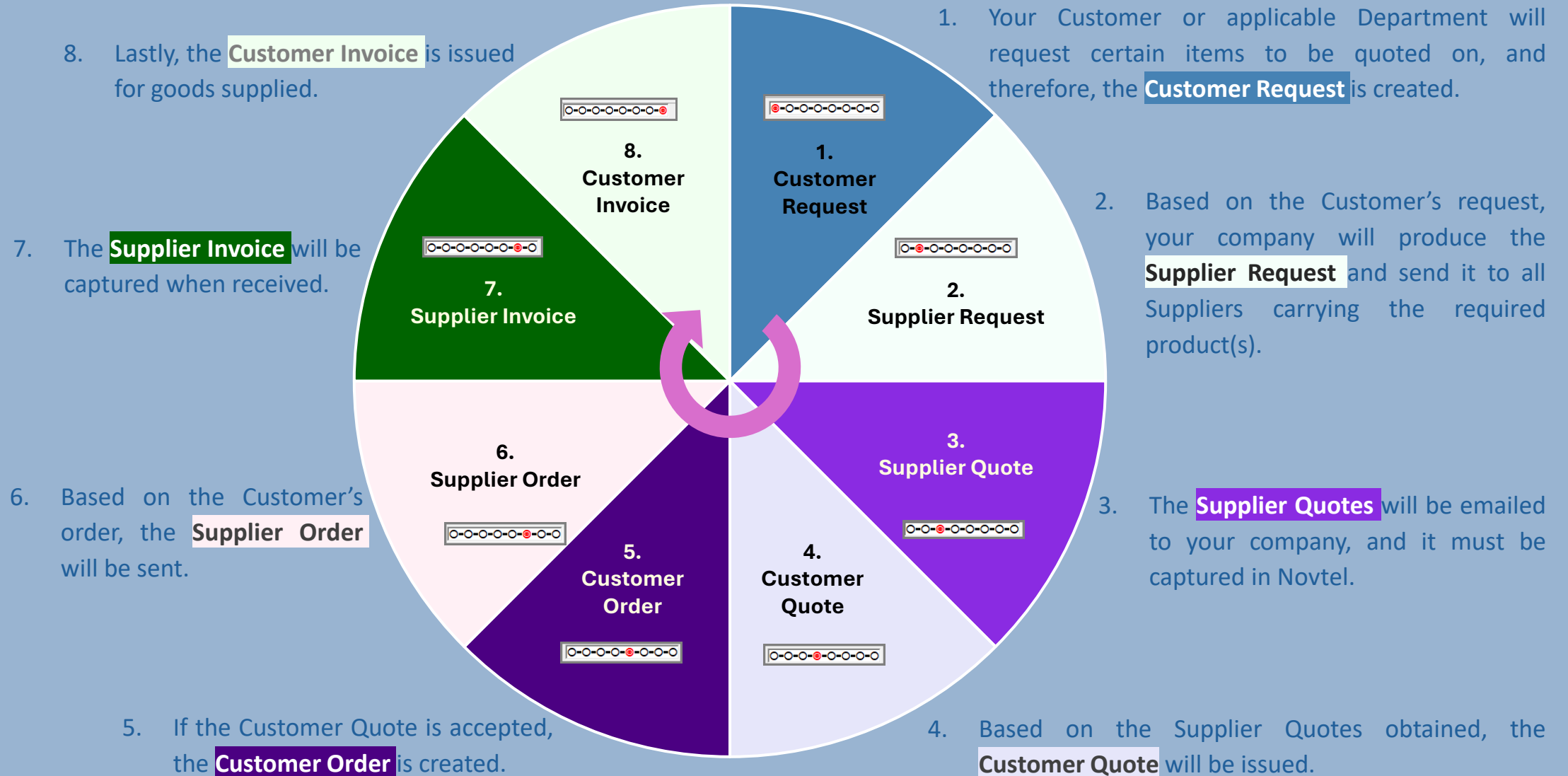
With Novtel Procurement, your company can act as an Agency to source products from national and /or international Suppliers, and reselling the products to your Customers.

➤ **Internal Procurement (6 Steps)**

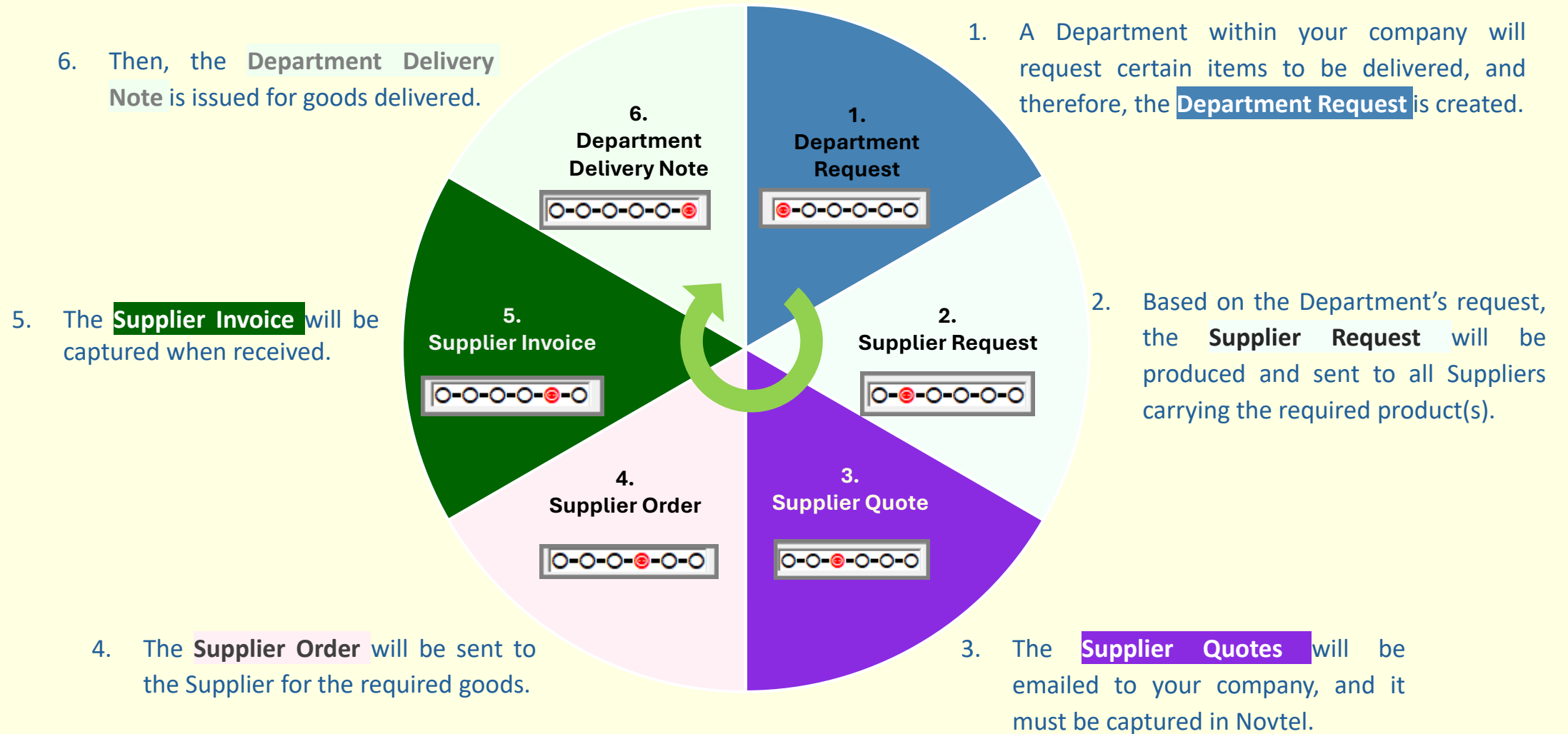
This process will be applicable where your company source products for its own use. Products can be sourced for different Branches and / or Departments.

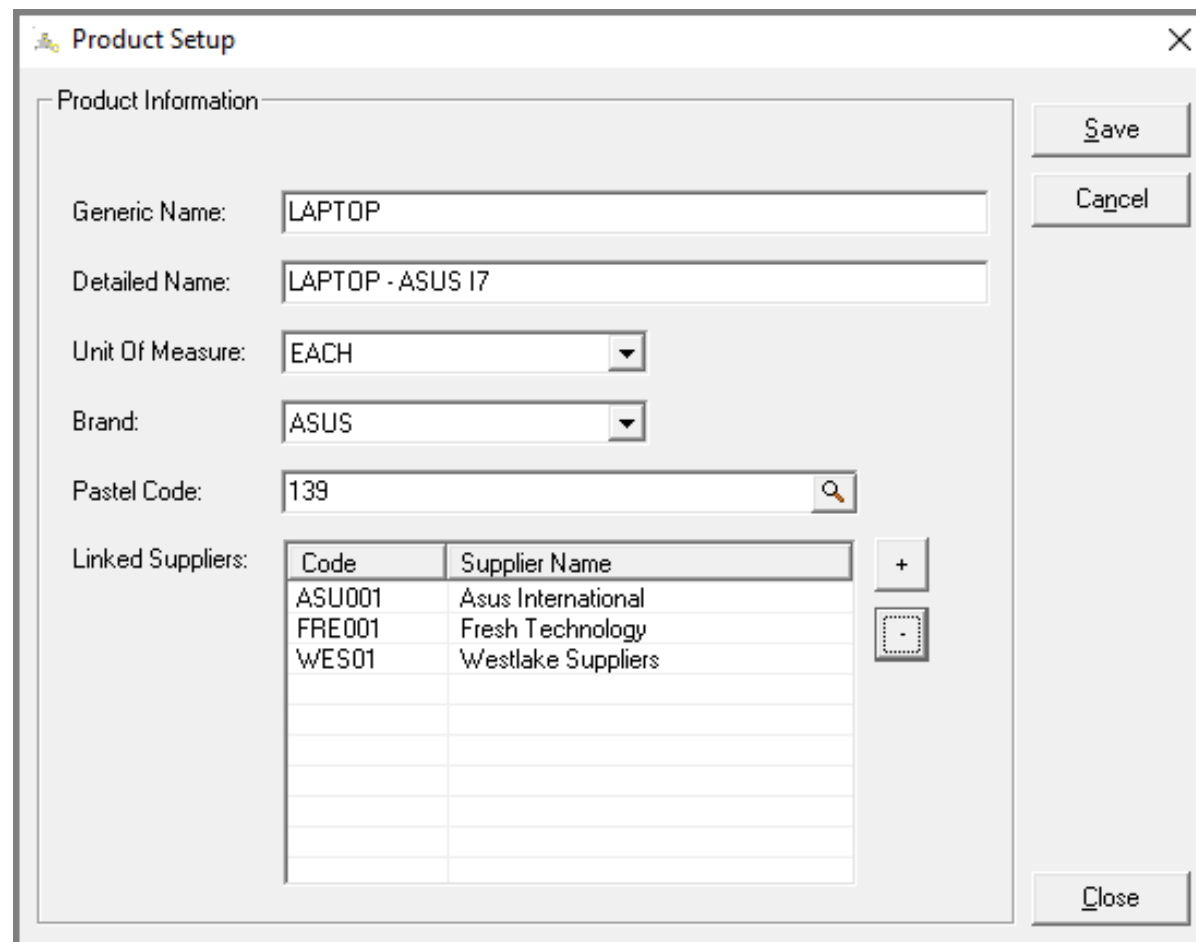


The External Procurement Cycle is as follows until the process is completed:



Internal Procurement





The 'Product Setup' dialog box contains the following fields and controls:

- Generic Name:** Text field with value 'LAPTOP'.
- Detailed Name:** Text field with value 'LAPTOP - ASUS I7'.
- Unit Of Measure:** Dropdown menu with value 'EACH'.
- Brand:** Dropdown menu with value 'ASUS'.
- Pastel Code:** Text field with value '139' and a search icon.
- Linked Suppliers:** A table with columns 'Code' and 'Supplier Name'. It contains three rows: 'ASU001 Asus International', 'FRE001 Fresh Technology', and 'WES01 Westlake Suppliers'. There are '+' and '-' buttons to the right of the table.

Buttons on the right side: 'Save', 'Cancel', and 'Close'.

Code	Supplier Name
ASU001	Asus International
FRE001	Fresh Technology
WES01	Westlake Suppliers

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.

System Messages Setup

System Message Information

Transaction Level: Customer Request

Message: The Customer urgently requests a quote on the products listed.

Add
Edit
Delete

Transaction Level	Message
Customer Request	The Customer urgently requests a quote on the products...
Supplier Request	Please Quote on the products listed, and whether you h...
Supplier Quote	The Supplier quotes have been obtained.Now quote th...
Customer Quote	Dear CustomerAs per your request, the following quot...
Customer Order	Please order the listed items.
Supplier Order	The ordered items are listed for urgent shipment.
Supplier Invoice	These Items ordered are now received and invoiced to ...
Customer Invoice	Dear CustomerPlease safeguard your invoice for warr...

Close

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



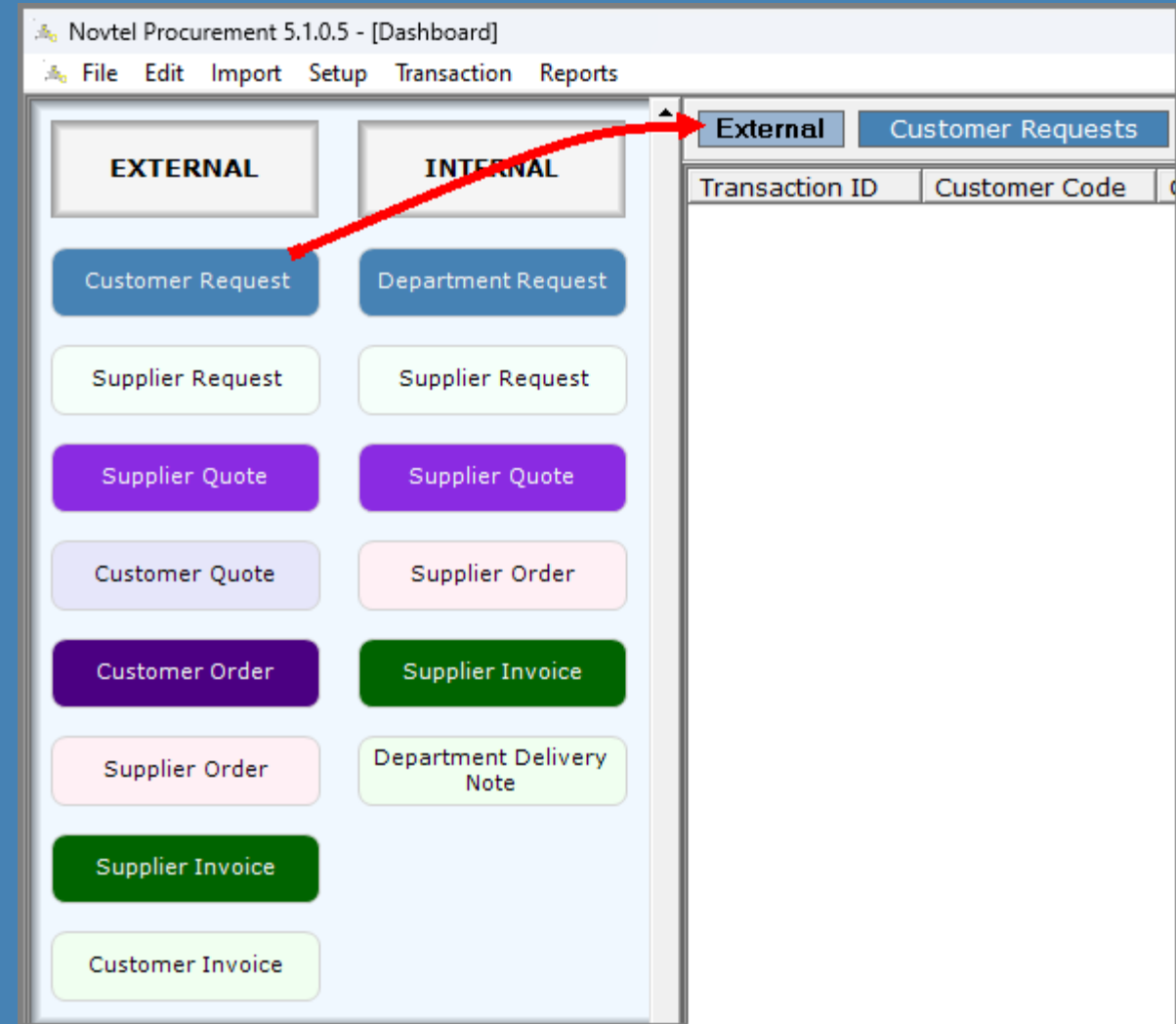
The External Procurement Process





External Procurement

Transaction Level 1 – Customer Request



Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request Department Request

Supplier Request Supplier Request

Supplier Quote Supplier Quote

Customer Request
Supplier Request
Supplier Quote
Customer Quote
Customer Order
Supplier Order
Supplier Invoice
Customer Invoice

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.

Customer Request

External

Transaction Number : 00176

General

Items

Request Date : 2024/09/19

Owner : Louise Janse van Vuuren

Customer Code : MAI001

Customer Name : Main Street Law Firm

Customer Contact : Jack Kendall

Remarks : The Customer urgently requests a quote on the products listed.

Add New Request

Edit Transaction

Print

Close

Last Modified : Louise Janse van Vuuren

- EXTERNAL
- 1
- Customer Request
- Supplier Request
- Supplier Quote
- Customer Quote
- Customer Order
- Supplier Order
- Supplier Invoice
- Customer Invoice

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 JW

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.



External Procurement

Transaction Level 2 – Supplier Request

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL		INTERNAL	
Customer Request	Department Request	External	Supplier Requests
Supplier Request	Supplier Request	Transaction ID	Customer Code
Supplier Quote	Supplier Quote		
Customer Quote	Supplier Order		
Customer Order	Supplier Invoice		
Supplier Order	Department Delivery Note		
Supplier Invoice			
Customer Invoice			

EXTERNAL

Customer Request

2

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

Customer Invoice

EXTERNAL

Customer Request

Supplier Request

Supplier Request

EXTERNAL

Supplier Requests

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request

Department Request

Supplier Request

Supplier Request

External

Internal

Packing List

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Request - Louise

Transaction Number : 00003

External

Products

Supplier Request

Customer: Peterson Attorneys

Product: LAPTOP I5

Quantity: 7.00

UOM: EACH

Remarks:

Product List: Link All Products

Generic Name

LAPTOP I5

KEYBOARD

MOUSE

Last Modified :

Transaction

Customer Name

Remarks

3 Peterson Attorneys Please Quote on 1TB HDD and a minimum of 32GB Memory.

1 Peterson Attorneys

Select

Cancel

Select

Search

Sort by : Transaction

Search for :

Transaction

Customer Name

Remarks

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

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

Supplier Request - Louise

Transaction Number : 00003

External

ProductsSupplier Request

Customer: Peterson Attorneys

Product: LAPTOP I5

Quantity: 7.00

UOM: EACH

Remarks:

Product List: ☒ Link All Products ✓ (Double-click on product to link to request)

Generic Name	Detailed Name	Qty	UOM	Remark
LAPTOP I5	ACER LAPTOP I5	7.00	EACH	
KEYBOARD	KEYBOARD - WIRELESS	7.00	EACH	
MOUSE	MOUSE - WIRED	7.00	EACH	

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.

Supplier Request - Louise

Transaction Number : 00003

External

ProductsSupplier Request

Supplier: Game Stores Mossel Bay

Request Date: Computer Genius

Owner: Louise JvV

Contact Person: Frank Peterson

Remarks:

Product List: Delete Product

Detailed Name	Qty	UOM	Remarks
ACER LAPTOP I5	7.00	EACH	
KEYBOARD - WIRELESS	7.00	EACH	
MOUSE - WIRED	7.00	EACH	

Product Remark:

Print ✓

Close

Last Modified : Louise JvV

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.



External Procurement

Transaction Level 3 – Supplier Quote

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL	INTERNAL
Customer Request	Department Request
Supplier Request	Supplier Request
Supplier Quote	Supplier Quote
Customer Quote	Supplier Order
Customer Order	Supplier Invoice
Supplier Order	Department Delivery Note
Supplier Invoice	
Customer Invoice	

External Supplier Quotes

Transaction ID	Customer Code
----------------	---------------

External Process Step 3

EXTERNAL

Customer Request

Supplier Request

3
Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

Customer Invoice

External

Supplier Quotes

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request

Department Request

Supplier Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

Supplier Quote - Louise

Transaction Number : 00003 Customer: Peterson Attorneys External

Supplier Name: Computer Genius

Quote Date: 2025/09/29

Owner: Louise JVV

Contact Person: Devin

Quote Total (Excl): R 0.00

Product: LAPTOP I5

Quantity: 7.00

Price (Excl): 0.00

Tax: 0.00

Price (Incl): 0.00

Product List:

Detailed Name
ACER LAPTOP I5

Select

Search

Sort by: Transaction

Search for:

Transaction	Customer Name	Remarks
3	Peterson Attorneys	Please Quote on 1TB HDD and a minimum of 32GB Me
1	Peterson Attorneys	

Select Cancel

Capturing the Supplier Quotes

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.

External
Process
Step 3

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

Supplier Quote - Louise

Transaction Number : 00003 Customer: Peterson Attorneys External

Supplier Name: Game Stores Mossel Bay

Quote Date: 2025/09/29

Owner: Louise JvV

Contact Person: Frank Peterson

Remarks:

Save

Cancel

Apply Rounding Charge

Charge Code: ROU001

Rounding Amount: 0.00

☐ Exclusive ☒ Inclusive

☒ Calculate Tax

Quote Total (Excl): R 63 608.70

Quote Total (Tax): R 9 541.30

Quote Total (Incl): R 73 150.00

Add

Delete

Product: MOUSE

Quantity: 7.00

UOM: EACH

Price (Excl): 86.96

Tax: 13.04

Price (Incl): 100.00

Remarks:

Product List:

Detailed Name	Qty	UOM	Price (Excl)	Tax	Price (Incl)	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)	Remark
ACER LAPTOP I5	7.00	EACH	8 913.04	1 336.96	10 250.00	62 391.30	9 358.70	71 750.00	
KEYBOARD - WIRELESS	7.00	EACH	86.96	13.04	100.00	608.70	91.30	700.00	
MOUSE - WIRED	7.00	EACH	86.96	13.04	100.00	608.70	91.30	700.00	

Last Modified : Louise JvV

Close

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

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL		INTERNAL	
Customer Request	Department Request	External	Customer Quotes
Supplier Request	Supplier Request	Transaction ID	Customer Code
Supplier Quote	Supplier Quote		
Customer Quote	Supplier Order		
Customer Order	Supplier Invoice		
Supplier Order	Department Delivery Note		
Supplier Invoice			
Customer Invoice			

External
Process
Step 4

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

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.

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request Department Request

Supplier Request Supplier Request

External Internal Packing List

Customer Request Supplier Request Supplier Quote Customer Quote Customer Order Supplier Order

Customer Quote - Louise

Transaction Number : 00003 External

Customer Name : Peterson Attorneys Incoterm : Remarks :

Quote Date : 29/09/2025 Owner : Louise JVW

Customer Contact : Jack Peterson Markup Margin : 1 Rate Of Exchange : 1

Quote Total (Excl): R 79 976.52 Quote Total (Tax): R 11 996.48 Quote Total (Incl): R 91 973.00

Products Freight

Product: ACER LAPTOP I5 Delete

Quantity: 7.00 UOM: EACH

SQ Price (Excl): 8 913.04 CQ Price (Excl): 11 216.52

SQ Price (Tax): 1 336.96 (R) CQ Price (Tax): 1 682.48

SQ Price (Incl): 10 250.00 CQ Price (Incl): 12 899.00 Calculate Prices

Remarks :

Product List:

Detailed Name	Qty	UOM	SQ Price (Excl)	SQ Price (Tax)	SQ Price (Incl)	CQ Price (Excl)	CQ Price (Tax)	CQ Price (Incl)
ACER LAPTOP I5	7.00	EACH	8 913.04	1 336.96	10 250.00	11 216.52	1 682.48	12 899.00
KEYBOARD - WIRELESS	7.00	EACH	86.96	13.04	100.00	104.35	15.65	119.99
MOUSE - WIRED	7.00	EACH	86.96	13.04	100.00	104.35	15.65	119.99

Supplier Name Product SQ Price (Excl) SQ Price (Tax) SQ Price (Incl)

Computer Genius	LAPTOP I5	0.00	0.00	0.00
Game Stores Mossel...	LAPTOP I5	8 913.04	1 336.96	10 250.00
Game Stores Mossel...	KEYBOARD	86.96	13.04	100.00
Game Stores Mossel...	MOUSE	86.96	13.04	100.00

Apply Rounding Charge Charge Code: ROU001 Rounding Amount: 0.00 Exclusive Inclusive Calculate Tax

Save Cancel

Last Modified :

External
Process
Step 4

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

Issuing the External Customer Quote

Type : EXTERNAL Transaction : 00003

Tech Supplies

Tel: 082 1478569 Fax:

E-mail: louise@novtel.com

CUSTOMER QUOTE

Page : 1 / 1

Customer : Peterson Attorneys

Contact Person : Jack Peterson

Tel : 044 652365

Fax :

Email : jack@pertsen.com

Quote Date : 2025/09/29

Sent By : Louise JW

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.



External Procurement

Transaction Level 5 – Customer Order

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL		INTERNAL	
Customer Request	Department Request	External	Customer Orders
Supplier Request	Supplier Request	Transaction ID	Customer Code
Supplier Quote	Supplier Quote		
Customer Quote	Supplier Order		
Customer Order	Supplier Invoice		
Supplier Order	Department Delivery Note		
Supplier Invoice			
Customer Invoice			

External Process Step 5

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

Customer Invoice

External

Customer Orders

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request Department Request

Supplier Request Supplier Request

Supplier Order

External > Customer Request
Internal > Supplier Request
Packing List > Supplier Quote
Customer Quote
Customer Order ✓
Supplier Order
Supplier Invoice

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.

Customer Order - Louise

Transaction Number : 00003 External

General

Order Date : 2025/09/29

Owner : Louise JyV

Customer Code : PET001

Customer Description : Peterson Attorneys

Customer Contact : Jack Peterson

Customer Reference :

Job Code : 001

Job Code Description : Order 1

Items

Apply Rounding Charge

Charge Code : ROU001

Rounding Amount : 0.00

Exclusive Inclusive

Calculate Tax

Edit Save Cancel

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



External Procurement



Transaction Level 6 – Supplier Order

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL		INTERNAL	
Customer Request	Department Request	Supplier Request	Supplier Request
Supplier Request	Supplier Quote	Supplier Quote	Supplier Order
Customer Quote	Customer Order	Supplier Invoice	Department Delivery Note
Supplier Order	Supplier Invoice	Customer Invoice	

External Supplier Orders

Transaction ID	Customer Code
----------------	---------------

External Process Step 6

Novtel Procurement 5.2.0.

File Edit Import Set

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order 6

Supplier Invoice

Customer Invoice

External

Supplier Orders

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request

Supplier Request

Department Request

Supplier Request

External

Internal

Packing List

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

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

Supplier Order - Louise

Transaction Number : 00003 Customer: Peterson Attorneys External

Suppliers: Game Stores Mossel Bay Delivery Date: 2025/09/29 Add Edit Delete Print

Order Date: 2025/09/29 Job Code: 001

Owner: Louise JVW Delivery Address:

Contact Person: Frank Peterson

Remarks:

Apply Rounding Charge

Charge Code: ROU001

Rounding Amount: 0.00

Exclusive Inclusive

Calculate Tax

Order Total (Excl): R63 608.70 Order Total (Tax): R9 541.30 Order Total (Incl): R73 150.00

Product: LAPTOP I5

Quantity: 7.00 UOM: EACH

Price (Excl): 8 913.04 Remarks:

Tax: 1 336.96

Price (Incl): 10 250.00

Product List:

Detailed Name	Qty	UOM	Price (Excl)	Price (Tax)	Price (Incl)	Remark	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)
ACER LAPTOP I5	7.00	EACH	8 913.04	1 336.96	10 250.00		62 391.30	9 358.70	71 750.00
KEYBOARD - WIRELESS	7.00	EACH	86.96	13.04	100.00		608.70	91.30	700.00
MOUSE - WIRED	7.00	EACH	86.96	13.04	100.00		608.70	91.30	700.00

Last Modified : Louise JVW

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.

External Process Step 6

External Supplier Orders

Producing the Supplier Order

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.

Novtel Procurement 5.2.0.
File Edit Import Set

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order 6

Supplier Invoice

Customer Invoice

Supplier Order - Louise

Transaction Number: 00003 Customer: Peterson Attorneys External

Suppliers: Game Stores Mossel Bay Delivery Date: 2025/10/01 Add Edit Delete

Order Date: 2025/09/29 Job Code: 001

Owner: Louise JW Delivery Address: 78 Main Street Mossel Bay 6500

Contact Person: Frank Peterson

Remarks:

Apply Rounding Charge

Charge Code: R0U001 Rounding Amount: 0.00

☐ Exclusive ☒ Inclusive ☒ Calculate Tax

Order Total (Excl): R63 608.70 Order Total (Tax): R9 541.30 Order Total (Incl): R73 150.00

Product: LAPTOP I5 Quantity: 7.00 UOM: EACH Price (Excl): 8 913.04 Tax: 1 336.96 Price (Incl): 10 250.00

Remarks:

Detailed Name	Qty	UOM	Price (Excl)	Price (Tax)	Price (Incl)	Remark	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)
ACER LAPTOP I5	7.00	EACH	8 913.04	1 336.96	10 250.00		62 391.30	9 541.30	71 750.00
KEYBOARD - WIRELESS	7.00	EACH	86.96	13.04	100.00		608.70	91.30	700.00
MOUSE - WIRED	7.00	EACH	86.96	13.04	100.00		608.70	91.30	700.00

Last Modified: Louise JW

Supplier Order

Zoom 100%

Type: EXTERNAL Transaction: 00003

Tech Supplies

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

SUPPLIER ORDER

Page: 1 / 1

Supplier: Game Stores Mossel Bay

Contact Person: Frank Peterson
Tel: 044 123456
Fax:
Email: frank@gamemb.com

Order Date: 2025/09/29

Job Code: 001

Sent By: Louise JW

Remarks:

Delivery Date : 2025/10/01
Delivery Address : 78 Main Street
Mossel Bay
6500

Line	Product	Qty	UOM	Price (Excl)	Tax	Price (Incl)
0002	ACER LAPTOP I5	7.00	EACH	8 913.04	1 336.96	10 250.00
	Line Total:			62 391.30	9 541.30	71 750.00
0003	KEYBOARD - WIRELESS	7.00	EACH	86.96	13.04	100.00
	Line Total:			608.70	91.30	700.00
0004	MOUSE - WIRED	7.00	EACH	86.96	13.04	100.00
	Line Total:			608.70	91.30	700.00
Order Total:				R 63 608.70	R 9 541.30	R 73 150.00



External Procurement

Transaction Level 7 – Supplier Invoice

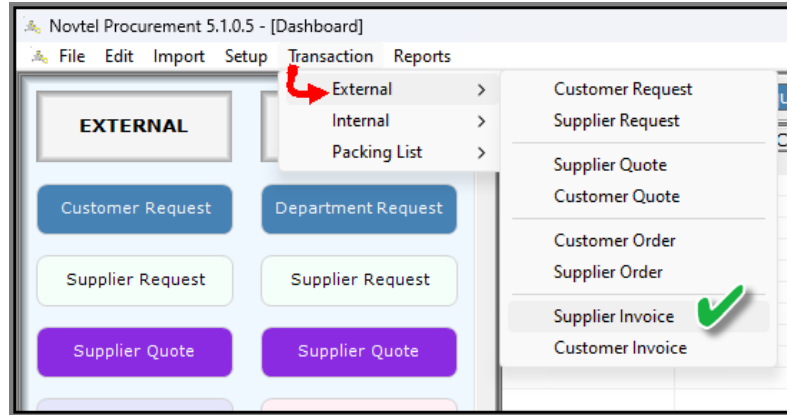
Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL		INTERNAL	
Customer Request	Department Request	External	Supplier Invoices
Supplier Request	Supplier Request	Transaction ID	Customer Code
Supplier Quote	Supplier Quote		
Customer Quote	Supplier Order		
Customer Order	Supplier Invoice		
Supplier Order	Department Delivery Note		
Supplier Invoice			
Customer Invoice			

External Process Step 7

External Supplier Invoices



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.

The screenshot shows the 'Supplier Invoice - Louise' form. The 'Supplier Invoice No.' field is highlighted with a red box and a red circle with the number 1. The 'Update Invoice' button is highlighted with a red circle with the number 2. The form includes fields for Transaction Number, Customer, Suppliers, Invoice Date, Owner, Contact Person, Payment Date, Job Code, Delivery Address, and Remarks. It also has a 'Product List' table with columns for Detailed Name, Qty, UOM, Price (Excl), Price (Tax), Price (Incl), Remark, Line Total (Excl), Line Total (Tax), and Line Total (Incl).

Detailed Name	Qty	UOM	Price (Excl)	Price (Tax)	Price (Incl)	Remark	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)
ACER LAPTOP I5	7.00	EACH	8 913.04	1 336.96	10 250.00		62 351.30	9 358.70	71 750.00
KEYBOARD - WIRELESS	7.00	EACH	86.96	13.04	100.00		608.70	51.30	700.00
MOUSE - WIRED	7.00	EACH	86.96	13.04	100.00		608.70	51.30	700.00

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.

External Process Step 7



Integration

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

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

Supplier Invoice - Louise

Transaction Number : 00003 Customer: Peterson Attorneys External

Suppliers: Game Stores Mossel Bay

Payment Date: 2025/10/31

Invoice Date: 2025/10/01

Job Code: 001

Owner: Louise JvV

Delivery Address: 78 Main Street Mossel Bay 6500

Contact Person: Frank Peterson

Remarks:

Supplier Invoice No : INV74125

Xero Doc No: NSB00004

Unupdate Invoice

External
Process
Step 7

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

ExternalSupplier Invoices



Integration

The Companion App has imported the transaction to Xero Successfully.

Filters

Novtel Product

☐ Novtel Equipment Hire

☐ Novtel Hospitality

☒ Novtel Procurement

☐ Novtel Property Management

☐ Novtel Relations

☐ Novtel Self Storage

☐ Novtel Vehicle Hire

☒ Xero Companion

Category

☐ Contacts

☐ Inventory

☒ Invoicing

☐ Synchronization

☐ Transactions

Status

☒ Completed

☒ Failed

☒ Recorded

Xero Organization

All

Workstation

Xero Tasks

0Recorded

0%

0Failed

0%

8Completed

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

External
Process
Step 7

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

External

Supplier Invoices

Capturing the Supplier Invoice



Integration

Game Stores Mossel Bay

GAM001

Bills you need to pay >

73,150.00

Activity

Contact details

Financial details

Files

Bills

Q Enter an amount or reference

Type	Reference	Issue date ↓	Due date	Paid date	Paid	Due	Status
Bill	NSB00004	1 Oct 2025	1 Oct 2025		0.00	73,150.00	Awaiting Payment

Bill

Credit note

Showing items 1-3 of 3

Purchases overview > Bills to pay >

Bill NSB00004

Awaiting Payment

Print PDF

Bill Options

From

Game Stores Mossel Bay

No address

Add address

Account No.

GAM001

Date

1 Oct 2025

Due Date

1 Oct 2025

Reference

NSB00004

Total

73,150.00

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Account	Tax Rate	Amount ZAR
ACE0001	ACER LAPTOP I5	7.00	8,913.0435	Cost of Goods Sold	Standard Rate Purchases	62,391.30
KEY0002	KEYBOARD - WIRELESS	7.00	86.9565	Cost of Goods Sold	Standard Rate Purchases	608.70
MOU0001	MOUSE - WIRED	7.00	86.9565	Cost of Goods Sold	Standard Rate Purchases	608.70
External Transaction Number 00003						

Subtotal

63,608.70

Total Standard Rate Purchases 15%

9,541.30

TOTAL

73,150.00

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

External
Process
Step 7



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

Supplier Invoice - Louise

Transaction Number : 00177 Customer: Lawson and Sons External

Suppliers: Westlake Suppliers

Invoice Date: 2024/12/13

Owner: Louise Janse van Vuuren

Contact Person: Ben Stevens

Remarks: These Items ordered are now received and invoiced to our company.

Supplier Invoice No : INV369852

Payment Date: 2025/01/31

Job Code: 004

Delivery Address: 77 Cross Road
Diaz Beach
Mossel Bay
6500

Pastel Doc No.: PNA20002

Edit Print

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

Job Code : 004

Delivery Address : 77 Cross Road
Diaz Beach
Mossel Bay
6500

Contact Person : Ben Stevens

Tel : 021 124578

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

Sage Integration

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

[illegible]



- 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)

External
Process
Step 7

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

Customer Invoice

Process Supplier

Document Type: Supplier Invoice

Number: PNA20002

Supplier: WES01

Westlake Suppliers

Link / Create

☒ Inclusive
☐ Supplier User Defined Fields
☐ Additional Costs
☐ On Hold

Physical Address
77 Cross Road
Diaz Beach
Mossel Bay
6500

Ship / Deliver: 30 days
Terms: 30 days
Freight Method:
Ship / Deliver:
Current Balance: 0.000
Credit Limit: 0.000

Period	Date	Supplier Invoice No.	Discount %	Exch. Rate	Terms	Payment Due
10	2024/12/13	INV369852	0.00	1.000000	00	2025/01/31

Type	Store	Code	Description	Project	Unit	Quantity	Tax	Inc Price	Disc%	Home	N
4 Item Code	001	141	KEYBOARD - WIRELESS	004		5.00	15	59.80		299.000	299.000

Batch... Delete / Insert... Edit Document Next Document Print Document Additional Fields

Discount
Exclusive: 260.000
Tax: 39.000
TOTAL: 299.000

Close



External Procurement

Transaction Level 8 – Customer Invoice

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL	INTERNAL
Customer Request	Department Request
Supplier Request	Supplier Request
Supplier Quote	Supplier Quote
Customer Quote	Supplier Order
Customer Order	Supplier Invoice
Supplier Order	Department Delivery Note
Supplier Invoice	
Customer Invoice	

External Customer Invoices

Transaction ID	Customer Code

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

8

Customer Invoice

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Department Request

Supplier Request

Supplier Quote

External

Internal

Packing List

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

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.

Customer Invoice

Transaction Number : 00003

Customer: Peterson Attorneys

External

Customer

Header

Customer Contact : Jack Peterson

Owner: Louise JvV

Secondary Cust:

Pastel Doc No:

Invoice Date : 2025/09/29

Remarks :

Address: 14 Main Street

Primary Delivery Mossel Bay

6500

Invoice Total (Excl): R 79 976.52

Invoice Total (Tax): R 11 996.48

Invoice Total (Incl): R 91 973.00

Save

Cancel

Update Invoice

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

Customer Invoice

Transaction Number: 00003Customer: Peterson AttorneysExternal

Customer

Header

Customer Contact: Jack PetersonOwner: Louise JvW

Secondary Cust:Pastel Doc No:

Invoice Date: 2025/09/29Remarks:

Address:Primary Postal

Invoice Total (Excl): R 79 976.52Invoice Total (Tax): R 11 996.48Invoice Total (Incl): R 91 973.00

Save

Cancel

Update Invoice

Apply Rounding Charge

Charge Code: ROU001

Rounding Amount: 0.00

☐ Exclusive☒ Inclusive

☒ Calculate Tax

Products

Freight

Product: COURIER COST

Quantity: 1UDM: EACH

Price (Excl): 799.77

Price (Tax): 119.96(R)

Price (Incl): 919.73☐ Calculate Insurance

Freight List:

Detailed Name	Qty	UDM	Price (Excl)	Price (Tax)	Price (Incl)	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)

Save

Cancel

Close

Last Modified : Louise JvW

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

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

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

Customer Invoice

Transaction Number : 00003Customer: Peterson AttorneysExternal

Customer

Header

Customer Contact : Jack PetersonOwner: Louise JvW

Secondary Cust:Pastel Doc No:

Invoice Date : 2025/09/29Remarks :

Address:Primary Postal

Invoice Total (Excl): R 80 776.29Invoice Total (Tax): R 12 116.44Invoice Total (Incl): R 92 892.73

Update Invoice

Apply Rounding Charge

Charge Code: ROU001Rounding Amount: 0.00

Exclusive

Inclusive

Calculate Tax

Products

Freight

Product: COURIER COST

Quantity: 1.00UOM: EACH

Price (Excl): 799.77Price (Tax): 119.96 (R)Price (Incl): 919.73

Calculate Insurance

Freight List

Detailed Name	Qty	UOM
COURIER COST	1.00	EACH

Last Modified : Louise JvW

Customer Invoice

Transaction Number : 00003Customer: Peterson AttorneysExternal

Customer

Header

Customer Contact : Jack PetersonOwner: Louise JvW

Secondary Cust:Pastel Doc No: INV-0003

Invoice Date : 2025/09/29Remarks :

Issuing the Customer Invoice

Customer Invoices

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



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

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

Filters

Novtel Product

☐ Novtel Equipment Hire

☐ Novtel Hospitality

☒ Novtel Procurement

☐ Novtel Property Management

☐ Novtel Relations

☐ Novtel Self Storage

☐ Novtel Vehicle Hire

☒ Xero Companion

Category

☐ Contacts

☐ Inventory

☒ Invoicing

☐ Synchronization

☐ Transactions

Status

☒ Completed

☒ Failed

☒ Recorded

Xero Organization

All

Workstation

LOUISE

Xero Tasks

0Recorded

0Failed

9Completed

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	NSB000002
29 Sep 2025 @ 09:53	LOUISE	Louise	Procurement	Default Dataset	Internal Supplier Invoice (00002)	Import Debit Note	Procurement	Completed	NDN000002
29 Sep 2025 @ 10:17	LOUISE	Louise	Procurement	Default Dataset	Internal Supplier Invoice (00002)	Import Bill	Procurement	Completed	NSB000003
29 Sep 2025 @ 13:00	LOUISE	Louise	Procurement	Default Dataset	External Supplier Invoice (00003)	Import Bill	Procurement	Completed	NSB000004
29 Sep 2025 @ 13:42	LOUISE	Louise	Procurement	Default Dataset	External Customer Invoice (00003)	Import Invoice	Procurement	Completed	INV-0003

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Customer Quote

Customer Order

Supplier Order

Supplier Invoice

8 Customer Invoice

ExternalCustomer Invoices

PA

Peterson Attorneys

PET001

Activity

Invoices owed to you

92,892.73

Invoices

Number/Type	Reference	Issue date	Due date	Paid date	Paid	Due	Status
INV-0003	0000000003	29 Sept 2025	29 Sept 2025		0.00	92,892.73	Awaiting payment

Invoice INV-0003

Contact	Issue date	Due date	Invoice number	Reference	Online payments	Branding theme
Peterson Attorneys	29 Sep 2025	29 Sep 2025	INV-0003	0000000003	None	Standard

Item	Description	Qty.	Price	Disc.	Account	Tax rate	Tax amount	Project	Amount ZAR
ACER LAPTOP I5	ACER LAPTOP I5	7	12899.00		200 - Sales	Standard Rate Sales (15%)	11777.35		90293.00
KEYBOARD - WIRELESS	KEYBOARD - WIRELESS	7	120.00		200 - Sales	Standard Rate Sales (15%)	109.57		840.00
MOUSE - WIRED	MOUSE - WIRED	7	120.00		200 - Sales	Standard Rate Sales (15%)	109.57		840.00
FREIGHT ITEMS									
COURIER COST	COURIER COST	1	919.73		200 - Sales	Standard Rate Sales (15%)	119.96		919.73
External Transaction Number 00003									
Subtotal									92,892.73
Includes Standard Rate Sales 15%									12,116.45

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



The Pastel Invoice is displayed as follows:

Novtel Procurement (PROCURE)

FILE EDIT PROCESS VIEW CHANGE SETUP UTILITY WINDOW FAVOURITES HELP

Process Customer

Document Type: Tax Invoice Number: INA20001 Customer: LAW001 Lawson and Sons

Link / Create

Delivery Address: 78 Main Street Mossel Bay 6500

Inclusive
Quick Mode
Customer User Defined Fields
On Hold

Period	Date	Customer Ref	Sales Code	Discount %	Exch. Rate	Terms	Payment Due
10	2024/12/12	0000000004		0.00	1.00000000	00	2024/12/31

Type	Store	Code	Description	Project	Unit	Quantity	Serial	Tax	Exc Price	Disc%	Hoi
4 Item Code	001	144	LAPTOP - ASUS I3	004		5.00		15	5 950.00		29 750.0
4 Item Code	001	141	KEYBOARD - WIRELESS	004		5.00		15	79.00		395.0
7 Remarks			FREIGHT ITEMS								
7 Remarks											
7 Remarks											
4 Item Code	001	146	TRANSPORT COST	004		1.00		15	250.00		250.0
4 Item Code	001	147	INSURANCE COST	004		1.00		15	1 519.75		1 519.7

<F10> Receipt

Batch...	Delete / Insert...	Edit Document	Next Document	Print Document	Additional Fields	Close

Discount	
Exclusive	31 914.750
Tax	4 787.213
TOTAL	36 701.963



Novtel

Procurement



The Internal Procurement Process





Internal Procurement



Transaction Level 1 – Department Request

[illegible]

Internal Process Step 1

Internal

Department Requests

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

1
Department Request

Supplier Request

Supplier Quote

Supplier Order

Supplier Invoice

Department Delivery Note

INTERNAL

1
Department Request

2
Supplier Request

3
Supplier Quote

4
Supplier Order

5
Supplier Invoice

6
Department Delivery Note

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNALINTERNAL

Customer RequestDepartment Request

InternalTransaction

Internal Process Step 1

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.



Head Office

Branch /
Department 1

Branch /
Department 2

Branch /
Department 3

Branch /
Department 4

Branch /
Department 5

INTERNAL

1

Department Request

Supplier Request

Supplier Quote

Supplier Order

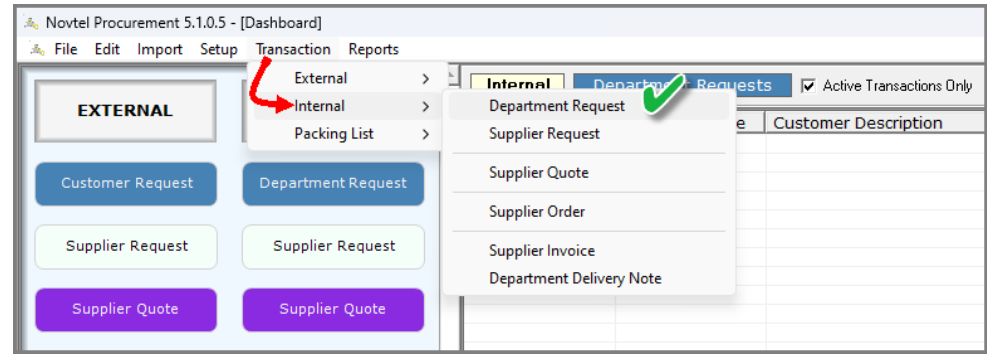
Supplier Invoice

Department Delivery
Note

Internal Process Step 1

Internal Department Requests

Creating the Department Request



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

INTERNAL

1

Department Request

Supplier Request

Supplier Quote

Supplier Order

Supplier Invoice

Department Delivery Note

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.

Department Request

Transaction Number : 00002

1

Internal

General

Items

Request Date : 2025/09/29

Owner : Louise JvV

Customer Code : INT001

Customer Name : Tech Supplies - Internal Order

Customer Contact : Steve Cross

Remarks :

2

Add New Request

Edit Transaction

Print

Close

Last Modified : Louise JvV



Internal
Process
Step 1

Creating the Department Request

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

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

Department Request

Transaction Number : 00000

Internal

General

Request Date : 2025/09/30

Owner : Louise JVV

Customer Code : INT001

Customer Name : Tech Supplies - Internal Order

Customer Contact : Steve Cross

Remarks : Items approved for the Finance Department

Add New Request Edit Transaction

Department Request

Transaction Number : 00000

Internal

General Items

ACER LAPTOP I5

Detailed Description : ACER LAPTOP I5

Qty : 3

UOM : EACH

Remarks :

Add Item Remove Item

Add New Request Edit Transaction Save Cancel

Internal
Process
Step 1

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

Department Request

Transaction Number : 00004

Internal

General Items

ACER LAPTOP I5

Detailed Description : ACER LAPTOP I5

Qty : 3.00

UOM : EACH

Remarks :

Add New Request Edit Transaction Print Close

Last Modified : Louise JvV

Creating the Department Request

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

Department Request

Zoom 100%

Type : INTERNAL Transaction : 4

Tech Supplies

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

DEPARTMENT REQUEST

Page : 1 / 1

Customer : Tech Supplies - Internal Order

Contact Person : Steve Cross
Tel : 044 65236
Fax :
Email : steve@vross.com

Request Date : 2025/09/30

Sent By : Louise JvV

Remarks : Items approved for the Finance Department

Line	Product	UOM	Qty
0001	ACER LAPTOP I5	EACH	3.00



Internal Procurement



Sage



Transaction Level 2 – Supplier Request

Internal Process Step 2

Supplier Request - Louise

Transaction Number :

Internal

Products

Customer: Tech Supplies - Internal Order

Product:

Quantity:

UOM:

Remarks:

Product List:

Generic Name	Detailed Name	Qty	UOM	Remark
LAPTOP I5	ACER LAPTOP I5	3.00	EACH	

Supplier Request

(Double-click on product to link to request)

Last Modified :

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

Internal
Process
Step 2

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

Internal Supplier Requests

Supplier Request - Louise

Transaction Number : 00004

Internal

Products

Supplier Request

Supplier: Computer Genius

Request Date: Game Stores Mossel Bay

Owner: Louise JvV

Contact Person: Devin

Remarks:

Product List:

Detailed Name	Qty	UOM	Remarks
ACER LAPTOP I5	3.00	EACH	

Product Remark:

Edit

Print

Delete Product

Close

Last Modified : Louise JvV

Producing the Supplier Request

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

Supplier Request

Zoom 100%

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



Internal Procurement



Transaction Level 3 – Supplier Quote

[illegible]

Internal Process Step 3

INTERNAL

Department Request

Supplier Request

3 Supplier Quote

Supplier Order

Supplier Invoice

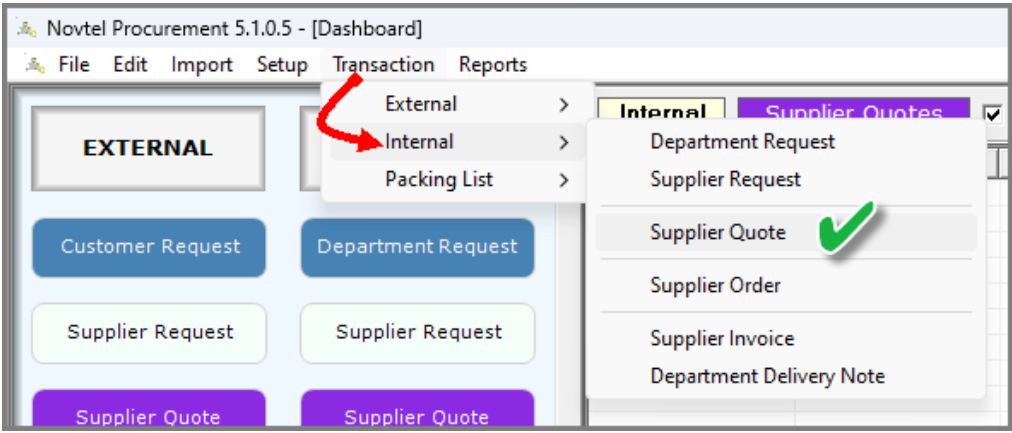
Department Delivery Note

Capturing the Supplier Quotes for Internal Orders

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.



Supplier Quote - Louise

Transaction Number: 00004 Customer: Tech Supplies - Internal Order Internal

Supplier Name: Computer Genius Remarks: Save Cancel

Quote Date: 2025/09/30

Owner: Louise JvV

Contact Person: Devin

Apply Rounding Charge

Charge Code: ROU001

Rounding Amount: 0.00

Exclusive Inclusive

Calculate Tax

Quote Total (Excl): R 24 130.43 Quote Total (Tax): R 3 619.57 Quote Total (Incl): R 27 750.00

Product: LAPTOP I5

Quantity: 3.00 UOM: EACH

Price (Excl): 8 043.48 Remarks:

Tax: 1 206.52

Price (Incl): 9 250.00

Product List

Detailed Name	Qty	UOM	Price (Excl)	Tax	Price (Incl)	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)	Remark
ACER LAPTOP I5	3.00	EACH	8 043.48	1 206.52	9 250.00	24 130.43	3 619.57	27 750.00	

Last Modified: Louise JvV

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



Internal Procurement



Transaction Level 4 – Supplier Order

[illegible]

Internal Process Step 4

Placing the Supplier Order for Internal Procurement

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.

INTERNAL

Department Request

Supplier Request

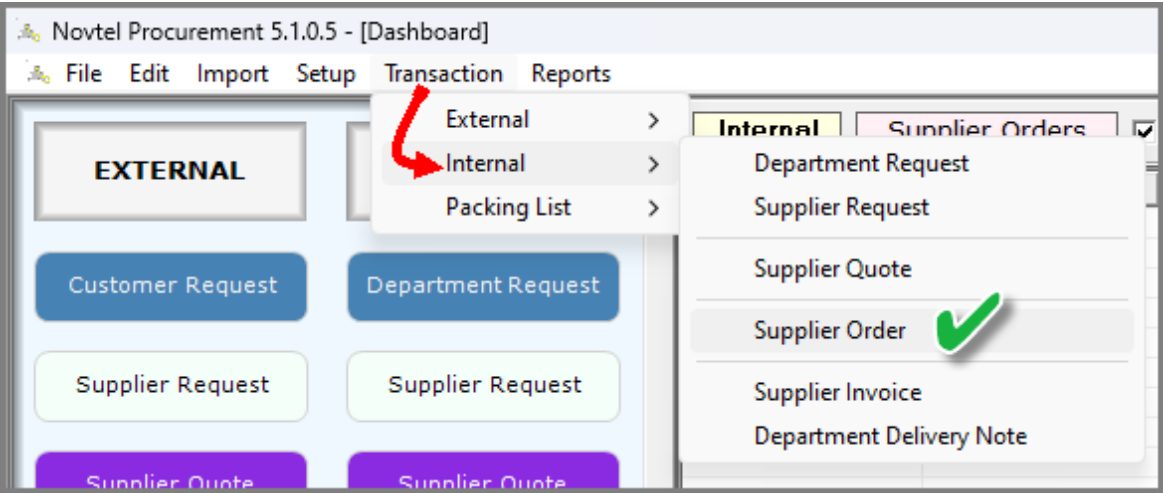
Supplier Quote

4

Supplier Order

Supplier Invoice

Department Delivery Note



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.

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

Supplier Order - Louise

Transaction Number : 00004 Customer: Tech Supplies - Internal Order Internal

Suppliers: Computer Genius Delivery Date: 2025/09/30 Save Cancel Apply Rounding Charge

Order Date: 2025/09/30 Job Code: 001 Charge Code: ROU001

Owner: Louise JW Rounding Amount: 0.00

Contact Person: Devin Delivery Address: 78 Main Street Mossel Bay 6500 Exclusive Inclusive Calculate Tax

Remarks:

Order Total (Excl): R24 130.43 Order Total (Tax): R3 619.57 Order Total (Incl): R27 750.00 Add Delete

Product: LAPTOP I5

Quantity: 3.00 UOM: EACH

Price (Excl): 8 043.48 Remarks:

Tax: 1 206.52

Price (Incl): 9 250.00

Product List:

Detailed Name	Qty	UOM	Price (Excl)	Price (Tax)	Price (Incl)	Remark	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)
ACER LAPTOP I5	3.00	EACH	8 043.48	1 206.52	9 250.00		24 130.43	3 619.57	27 750.00

Last Modified : Louise JW

Placing the Supplier Order for Internal Procurement

Supplier Order

Zoom 100%

Type : INTERNAL Transaction : 00004

Tech Supplies

Tel: 082 1478569 Fax:

E-mail: louise@novtel.com

SUPPLIER ORDER

Page : 1 / 1

Supplier : Computer Genius

Contact Person : Devin

Tel : 021 789654

Fax :

Email : computer@genius.com

Order Date : 2025/09/30

Job Code : 001

Sent By : Louise JW

Remarks :

Delivery Date : 2025/09/30

Delivery Address : 78 Main Street Mossel Bay 6500

Line	Product	Qty	UOM	Price (Excl)	Tax	Price (Incl)
0001	ACER 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
Order Total:				R 24 130.43	R 3 619.57	R 27 750.00



Internal Procurement

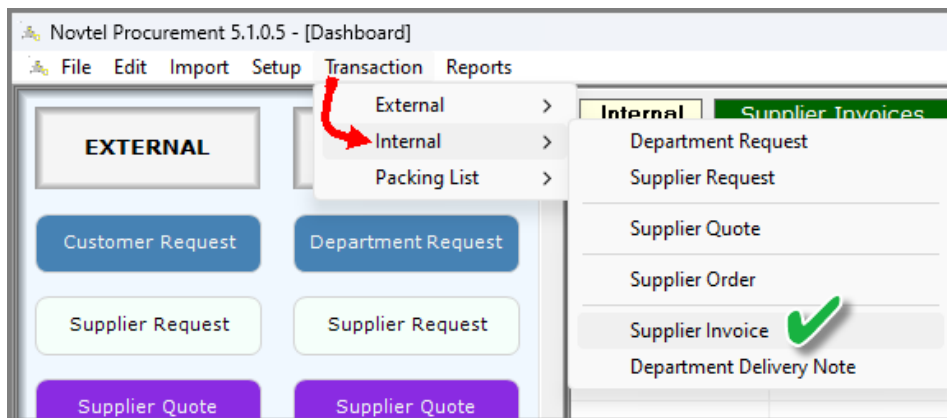


Transaction Level 5 – Supplier Invoice

Internal Process Step 5

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

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.

A screenshot of the 'Supplier Invoice - Louise' form. The form contains the following fields and values: Transaction Number: 00004; Customer: Tech Supplies - Internal Order; Suppliers: Computer Genius; Invoice Date: 2025/09/30; Owner: Louise JvV; Contact Person: Devin; Remarks: (empty); Payment Date: 2025/09/30; Job Code: 001; Delivery Address: 78 Main Street, Mossel Bay, 6500; Xero Doc No: (empty); Supplier Invoice No: INV78745 (highlighted with a red box). The form also includes 'Save', 'Cancel', and 'Update Invoice' buttons. At the bottom, the invoice totals are displayed: Invoice Total (Excl): R24 130.43; Invoice Total (Tax): R3 619.57; Invoice Total (Incl): R27 750.00.

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.

Supplier Invoice - Louise

Transaction Number : 00004

Customer: Tech Supplies - Internal Order

Internal

Suppliers: Computer Genius

Payment Date: 2025/09/30

Invoice Date: 2025/09/30

Owner: Louise JvV

Contact Person: Devin

Remarks:

Job Code: 001

Delivery Address: 78 Main Street

Mossel Bay

6500

Xero Doc No:

Edit

Print

Update Invoice

Apply Rounding Charge

Charge Code: ROU001

Rounding Amount: 0.00

Exclusive Inclusive

Calculate Tax

Supplier Invoice No : INV78745

Invoice Total (Excl): R24 130.43

Invoice Total (Tax): R3 619.57

Invoice Total (Incl): R27 750.00

Product: LAPTOP I5

Quantity: 3.00

UOM: EACH

Price (Excl): 8 043.48

Tax: 1 206.52

Price (Incl): 9 250.00

Remarks:

Product List:

Detailed Name	Qty	UOM	Price (Excl)	Price (Tax)	Price (Incl)	Remark	Line Total (Excl)	Line Total (Tax)	Line Total (Incl)
ACER LAPTOP I5	3.00	EACH	8 043.48	1 206.52	9 250.00		24 130.43	3 619.57	27 750.00

Close

Last Modified : Louise JvV

Last Modified By :

Internal
Process
Step 5

Internal Supplier Invoices



Integration

Capturing the Supplier Invoice

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

INTERNET

Filters

Novtel Product

Category

Status

Xero Organization

Workstation

Username

Novtel Product

Category

Status

Xero Organization

Workstation

Username

Xero Tasks

0 Recorded

0 Failed

10 Completed

Table of Xero Tasks

Supplier Invoice - Louise

Transaction Number: 00004

Customer: Tech Supplies - Internal Order

Internal

Suppliers: Computer Genius

Payment Date: 2025/09/30

Invoice Date: 2025/09/30

Job Code: 001

Owner: Louise JyV

Delivery Address: 78 Main Street, Mossel Bay, 6500

Contact Person: Devin

Remarks:

Supplier Invoice No: INV78745

Xero Doc No: NSB00005

Unupdate Invoice

DATE RECORDED	WORKSTATION	USERNAME	NOVTEL PRODUCT	NOVTEL D					
23 Sep 2025 @ 08:38	LOUISE	Louise	Procurement	Default					
23 Sep 2025 @ 12:56	LOUISE	Louise	Procurement	Default					
23 Sep 2025 @ 13:23	LOUISE	Louise	Procurement	Default					
23 Sep 2025 @ 14:04	LOUISE	Louise	Procurement	Default					
29 Sep 2025 @ 09:20	LOUISE	Louise	Procurement	Default					
29 Sep 2025 @ 09:53	LOUISE	Louise	Procurement	Default					
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
30 Sep 2025 @ 09:57	LOUISE	Louise	Procurement	Default Dataset	Internal Supplier Invoice (00004)	Import Bill	Procurement	Completed	NSB00005

Internal Process Step 5

INTERNAL

Department Request

Supplier Request

Supplier Quote

Supplier Order

5

Supplier Invoice

Department Delivery Note

Computer Genius
COM001

Bills you need to pay >

79,000.00

51,250.00 overdue

Activity

Contact details

Financial details

Files

Bills

Enter an amount or reference

Type	Reference	Issue date	Due date	Paid date	Paid	Due	Status
Bill	NSB00005	30 Sept 2025	30 Sept 2025		0.00	27,750.00	Awaiting Payment

Bill

Bill

Credit note

Showing items 1-4 of 4

Purchases overview > Bills to pay >

Bill NSB00005

Awaiting Payment

Print PDF

Bill Options

From	Account No.	Date	Due Date	Reference	Total
Computer Genius	COM001	30 Sep 2025	30 Sep 2025	NSB00005	27,750.00
No address					
Add address					

Amounts are Tax Exclusive

Item Code	Description	Quantity	Unit Price	Account	Tax Rate	Amount ZAR
ACE0001	ACER LAPTOP I5	3.00	8,043.4783	Cost of Goods Sold	Standard Rate Purchases	24,130.43
	Internal Transaction Number 00004					

Subtotal

24,130.43

Total Standard Rate Purchases 15%

3,619.57

TOTAL

27,750.00

Capturing the Supplier Invoice



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

Internal
Process
Step 5

Internal

Supplier Invoices

Capturing the Supplier Invoice

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

Pastel Doc No NSB00005

Contact Person : Devin

Job Code : 001

Tel : 021 789654

Delivery Address : 78 Main Street

Fax :

Mossel Bay

Email : computer@genius.com

6500

Invoice Date : 2025/09/30

Payment Date : 2025/09/30

Sent By : Louise JW

Remarks :

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.

Internal
Process
Step 5

INTERNAL

Department Request

Supplier Request

Supplier Quote

Supplier Order

Supplier Invoice

Department Delivery
Note

Internal

Supplier Invoices

Capturing the Supplier Invoice

Sage
Integration

Process Supplier

Document Type: Supplier Invoice Number: PNA2004 2 Supplier: PRI002 All Print Supplies

Link / Create

☒ Inclusive
☐ Supplier User Defined Fields
☐ Additional Costs
☐ On Hold

Physical Address
77 Cross Road
Diaz Beach
Mossel Bay
6500

Ship / Deliver: 30 days
Freight Method:
Ship / Deliver:
Current Balance: 0.000
Credit Limit: 0.000

Period	Date	Supplier Invoice No.	Discount %	Exch. Rate	Terms	Payment Due
10	2024/12/24	INV8574 1	0.00	1.000000	00	2025/01/31

Type	Store	Code	Description	Project	Unit	Quantity	Serial	Tax	Inc Price	Disc%	Ho
4 Item Code	001	PPA001	PRINTING AND COPYING PAPER	IN001		12.00		15	270.25		3 243.0
4 Item Code	001	PRI001	LASER PRINTER, COPIER AND	IN001		1.00		15	10 942.25		10 942.2

Discount	
Exclusive	12 335.000
Tax	1 850.250
TOTAL	14 185.250

Batch... Delete / Insert... Edit Document Next Document Print Document Additional Fields Close

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)

Internal
Process
Step 5

Internal Supplier Invoices



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

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

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

Supplier Invoice - Louise

Transaction Number : 00179 Customer: Tech Supplies - Internal Orders Internal

Suppliers: All Print Supplies Payment Date: 2025/01/31 Edit

Invoice Date: 2024/12/24 Job Code: IN001 Print

Owner: Louise Janse van Vuuren Delivery Address: 77 Cross Road, Diaz Beach, Mossel Bay, 6500

Contact Person: Gideon Waterman

Remarks: These Items ordered are now received and invoiced to our company.

Supplier Invoice No.: INV8574 Pastel Doc No.: PNA20004

Invoice Total (Excl): R12 335.00 Invoice Total (Tax): R1 850.25 Invoice Total (Incl): R14 185.25

Capturing the Supplier Invoice

Supplier Invoice

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 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 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

[illegible]

Internal
Process
Step 6

INTERNAL

Department Request

Supplier Request

Supplier Quote

Supplier Order

Supplier Invoice

Department Delivery Note 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.

Novtel Procurement 5.1.0.5 - [Dashboard]

File Edit Import Setup Transaction Reports

EXTERNAL

Customer Request

Supplier Request

Supplier Quote

Department Request

Supplier Request

Supplier Quote

External

Internal

Packing List

Internal

Supplier Invoices

Department Request

Supplier Request

Supplier Quote

Supplier Order

Supplier Invoice

Department Delivery Note

Department Delivery Note

Transaction Number: 00004 Customer: Tech Supplies - Internal Order Internal

Customer

Header

Customer Contact: Steve Cross

Owner: Louise JvV

Secondary Cust:

Invoice Date: 2025/09/30

Remarks:

Address:

Primary Postal

Save

Cancel

Invoice Total (Excl): R 24 130.43

Invoice Total (Tax): R 3 619.57

Invoice Total (Incl): R 27 750.00

Internal Process Step 6

Internal Department Delivery Notes

Issuing the Department Delivery Note

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

Transaction Number: 00004 Customer: Tech Supplies - Internal Order Internal

Customer

Header

Customer Contact: Steve Cross Owner: Louise JvV

Secondary Cust: Finance Department 1 Pastel Doc No:

Invoice Date: 2025/09/30 Remarks:

Address: 14 Lancaster Rd 2 Mossel Bay

Primary Delivery: Mossel Bay

Invoice Total (Excl): R 24 130.43 Invoice Total (Tax): R 3 619.57 Invoice Total (Incl): R 27 750.00

3 Save Cancel

Apply Rounding Charge

Charge Code: ROU001

Rounding Amount: 0.00

Exclusive Inclusive

Calculate Tax

Products

Freight

ACER LAPTOP I5

3.00 UOM: EACH Remarks:

Excl: 8 043.48 DI Price (Excl): 8 043.48

Tax: 1 206.52 (R) DI Price (Tax): 1 206.52

Incl: 9 250.00 DI Price (Tax): 9 250.00

Calculate Qty Calculate Prices

ist:

Name	Qty	UOM	SI Price (Excl)	SI Price (Tax)	SI Price (Incl)	DI Price (Excl)	DI Price (Tax)	DI Price (Incl)	DI Line Total (Excl)	DI Line Total (Tax)	DI Line Total (Incl)
APT0P I5	3.00	EACH	8 043.48	1 206.52	9 250.00	8 043.48	1 206.52	9 250.00	24 130.43	3 619.57	27 750.00

modified:

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:

The Internal Department Delivery Note can now be produced.



<https://x.com/NovtelSoftware>



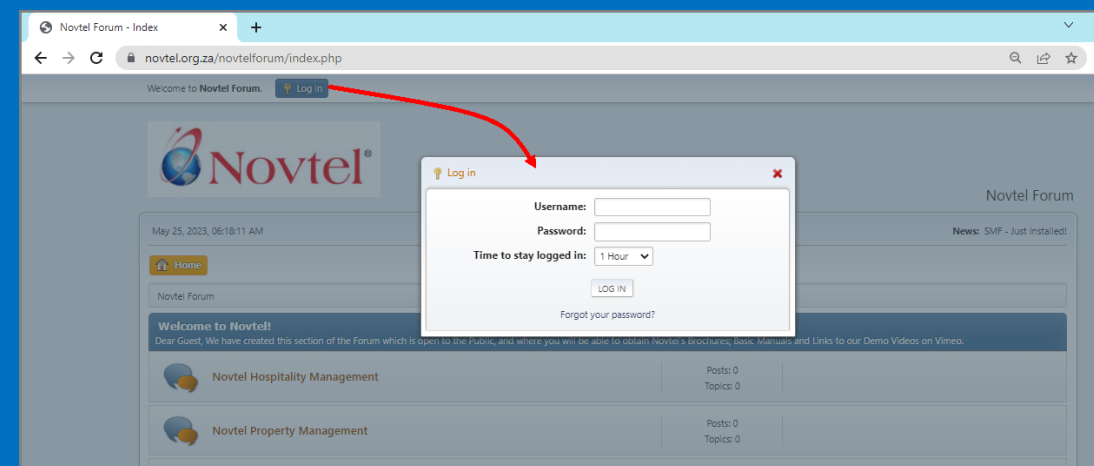
www.linkedin.com/company/novtel-software-training

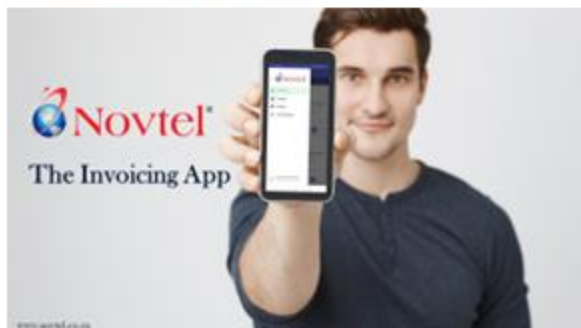


NOVTEL FORUM LOGIN LINK

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