



Novtel[®]

Hospitality Management

The Basics of the Quoting System and Activity Tracker

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Novtel[®]

Hospitality Management

The Quoting System

1

Introduction



Introduction

Quotations can be issued for any combination of, or all of the following:

- ✓ Accommodation
- ✓ Venue Hire / Conference Facilities
- ✓ Meals
- ✓ Events / Activities
- ✓ And any other required 'charges'

The quotation process will not affect room availability, since the quotation was not yet accepted, and the reservations made for specific rooms.

A quotation is issued for a Group Owner who will be liable for the payment of all costs involved when the quotation is accepted.

A Group reservation will be created in this case, and a single invoice and reservation statement is issued to the Group Owner only.



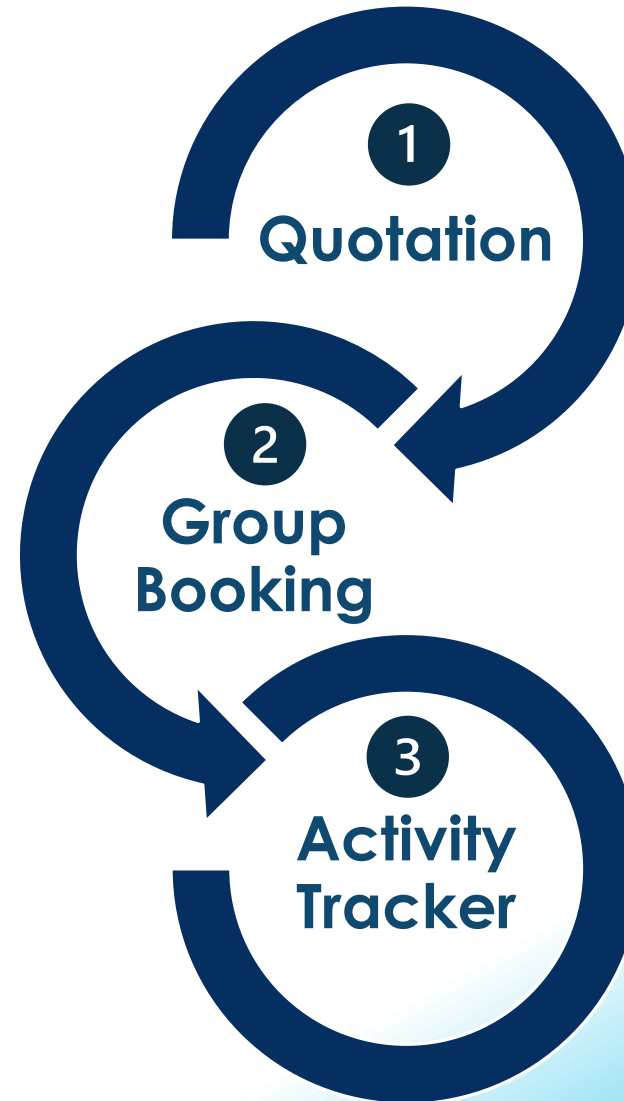
Introduction

IMPORTANT!!

Only once a quotation is issued, accepted and converted into a Group Reservation, will the details be available on the Activity Tracker (Function Sheet).

Directly creating a Group Booking in Novtel, will result in the Activity Tracker not being populated for the specific Group Booking.

It is therefor important to follow the correct steps to achieve the desired result.





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Hospitality Management

The Quoting System

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Setup Procedures



Setup Procedures

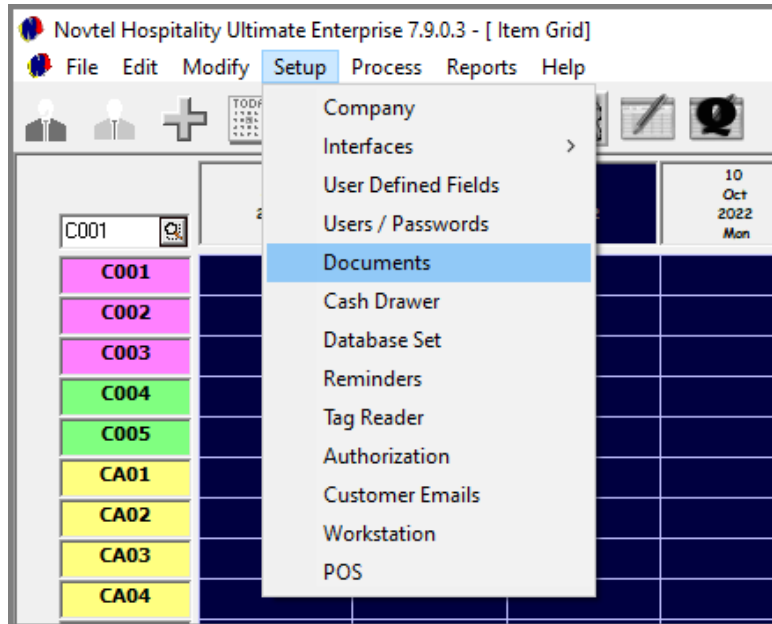
In order to use the Quoting system and Activity Tracker feature successfully and to its fullest potential, there are a few setup procedures that will initially take time to complete, but which will save the system operator a great deal of time when issuing a Quote, and ultimately, managing the Activity Tracker.

Therefore, the following setup procedures are highly recommended:

- ✓ Departments not related to the Restaurant Module
- ✓ Room Types
- ✓ Activity Grouping Options
- ✓ Activity Locations
- ✓ Activity Codes
- ✓ All Charges needed
- ✓ Discount – If Allowed
- ✓ Terms and Conditions



Setup Procedures – Terms and Conditions

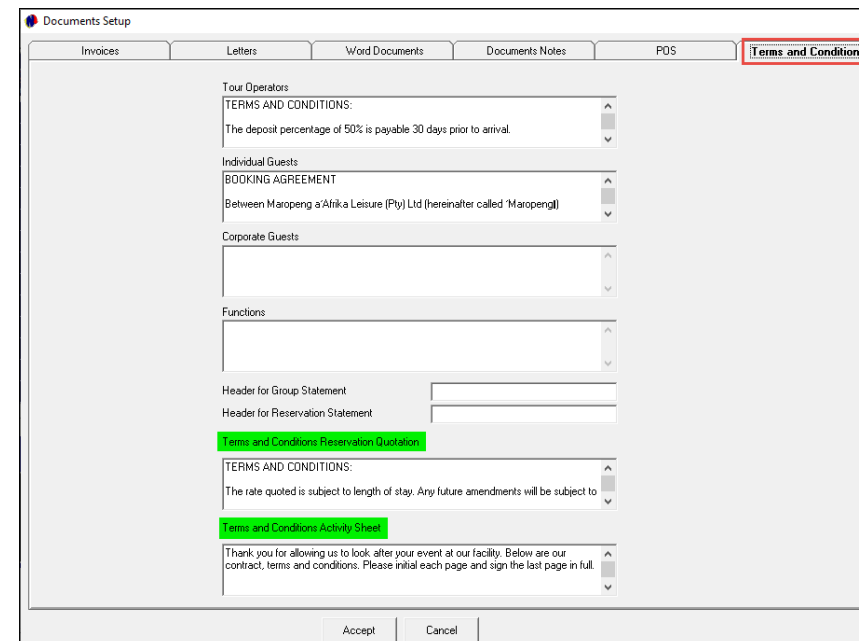


Terms and Conditions to be displayed on a Quote Document, as well as the Activity Sheet document, can be set up from the 'Setup – Documents – Terms and Conditions' tab.

The first 4 fields are reserved for the various sets of Terms and Conditions to be displayed on a reservation statement, and according to the set of T's and C's linked to a Customer Master File.

The 5th field is specifically intended for the Terms and Conditions to be displayed on a Quote document, and the last field, for the Terms and Conditions to be displayed on the Activity Sheet.

Please note that an unlimited number of characters can be used here.





Setup Procedures – Discount on Accommodation

As a rule, negative charges are NOT allowed to be added to the ‘Additional Costs’ tab of the ‘Group Details’ window.

BUT, when a Discount Charge was set up and linked to the ‘Company Setup – Financial’ tab, and this charge is used to allocate discount on the quotation, this charge **ONLY** will be the exception to the rule, and will cause no problems in being negative when the quotation is converted into a Group Reservation.

Code

AAA001

Description

Approved Discount

Barcode

☒ Display On Invoice

☐ Physical Item

☐ Service Charge Item

☐ Use Custom Rate

☐ Event Item

☐ Master Price

☐ Blocked

General

Properties

Voucher

Price Update

Foreign Currency

Activity Tracker

Allow Tax

☒

15 - Vat - Standard rated (15%)

Cost Price Excl

0.00

Markup %

0.00

Rate Incl

0.00

Charge Excl

0.00

User Defined Field 1

User Defined Field 2

User Defined Field 3

User Defined Field 4

User Defined Field 5

Customer Category

0 - No category

Customer Category - Implemented at Reservation and Group Additional Cost when selecting Charges. The Customer Category as setup for the Customer/ Guest will be used to only display Charges with the same Customer Category selected here. Default is No Category for Charge. (Activated per Customer)

Accept

Pastel Inventory Code

AAA001

Quote Discount

Cancel

View Audit Log

Multi Store code for retrieving Cost Price

Company Setup

Company Details

General

Financial

Preferences

Images

VAT / GST / Sales Tax

Use Tax

☒ Yes

☐ No

Tax Number

123456789

Default Tax Type

15 - Vat - Standard rated (15%)

ServiceCharge

Tax on Service Charge

☐

Charge Code

Service Charge

1

%

Clear

Invoiced Service Charge Code - Link to Charge Code

Clear

Include Service Charge in Charge Total

☐

Bad Debt Charge Code

BD001

Bad Debt Charge

Membership Cash Accounts

POS Button Caption

CAM001

Clear

MEMBER

Cash Membership Account

Select Charge

Code

Description

Excl

Tax

Incl

Accept

Cancel

001	Rare	0.00	0.00	0.00
002	Medium	0.00	0.00	0.00
003	Medium Rare	0.00	0.00	0.00
004	Medium - Well Done	0.00	0.00	0.00
006	Well Done	0.00	0.00	0.00
007	Scrambled	0.00	0.00	0.00
008	Fried - Medium	0.00	0.00	0.00
009	Fried - Soft	0.00	0.00	0.00
010	Sunny Side Up	0.00	0.00	0.00
011	Boiled	0.00	0.00	0.00
012	Poached	0.00	0.00	0.00
AAA001	Approved Discount	0.00	0.00	0.00
AAA003	Discount - Quotation	0.00	0.00	0.00
ACT001	Mini Golf	17.39	2.61	20.00
ACT003	Full Facial	0.00	0.00	0.00
ADD001	Fries - Half Portion	13.04	1.96	15.00
BAC001	Bacon	13.04	1.96	15.00
BAR002	Bar One Chocolate Bar	6.96	1.04	8.00
BD001	Bad Debt Charge	0.00	0.00	0.00
BEER01	Windhoek Light 375ml	21.74	3.26	25.00
BEER02	Windhoek Lager 375ml	21.74	3.26	25.00
BEER03	Castle Light 375ml	21.74	3.26	25.00
BEER04	Castle Lager 375ml	21.74	3.26	25.00
BRE001	Sunrise Breakfast	34.78	5.22	40.00
BRE002	Farmers Breakfast	60.00	9.00	69.00

Search By

Code

Search For

Reservation Discount Account

Reservation Discount Account (Reservation Quotation)

AAA001

Clear

Approved Discount

Accept

Cancel

Accept

Cancel



Setup Procedures - Departments

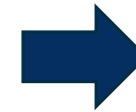
Departments not related to the Restaurant Module are set up for the following purposes:

- ✓ To link a Department to rooms; room types and charges
- ✓ To search for charges linked to a specific Department

Rooms



Departments



Charges

Edit Room

Code: C001
Description: Chalet 1 - 2 Bedroom

General | Details | Financial | User Defined Fields | Pastel Interface | Fixed Add Costs | Activity Tracker

Branch: Chalet, 2 Bedroom
Guest Tariff: C2B001 - Chalet 2 Bedroom
Force Guest Tariff: ☐
Show On Grid: ☒
Show On Web: ☐
One Day Booking: ☐
Event Venue: ☐
Exclude from Reports (Utilization and Rental Statistics): ☐
Department: RESERV (Reservations)
Room Type: 6 (2 Bedroom Chalet)
Subhire Item: ☐

Web Image | Accept | Cancel

Edit Charge

Code: PRO001
Description: Projector
Barcode:

☒ Display On Invoice
☐ Service Charge Item
☐ Event Item
☐ Physical Item
☐ Use Custom Rate
☐ Master Price
☐ Blocked

General | **Properties** | Voucher | Price Update | Foreign Currency | Activity Tracker

☐ POS Item
☐ Bar Item
☐ Shop Item
☐ Menu Item
☐ Component Item
☐ Payout Item
☐ Scale Item
☐ Refundable Charge Item
☐ Recipe Item

POS Category: Clear

Breakfast: ☐ Other: ☐
Lunch: ☐ Not Meal Type: ☒
Dinner: ☐

Department: CONFER (Conferencing)

Accept | Pastel Inventory Code: PRO001 | Projector | Cancel
View Audit Log | Multi Store code for retrieving Cost Price:



Setup Procedures - Departments

Departments

Code	Description
1	Lighthouse Restaurant
2	Curio Shop
3	Wine Tasting Room
4	Deli
5	The Anchor Restaurant
6	Pirates Pub
7	Achor Restaurant
8	Pool Side Restaurant
9	Hotel Restaurant
CONFER	Conferencing
LHREST	Lighthouse Restaurant
RES01	Student Accommodation
RESERV	Reservations
TO-EX	Ticket Office
TO-FR	Ticket Office - Falcon River
TO-FW	Ticket Office Falcon Woods
WED	Wedding

Add Edit Delete Close

The Departments linked to selected rooms and charges, will be displayed in the 'DE' column of the Quotation form.

Quotation

Quotation: 100 Copy Quotation Description: MBHS Teachers Teambuilding Sept 2022 Status: Quotation

Customer Code: MOS001 Mossel Bay High School
Country: South Africa
Start Date: 2022/09/03 End Date: 2022/09/04
Order Number:
Reservation Type: 2 Bed and Breakfast
Agent Code: 07 Louise

Apply Service Charge ☒
Create Events As Add Cost ☒
Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Add Room / Charge	Change Room	Select Guest	Room Type To Room	Add Country	Clear Tariff	Select Tariff	Select Type	Select Child Rate 1-5	Clear Select											
Room/Item	Q	DE	BQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	
0	D201	06	RV	0	MOS00	Mossel Bay High School				2022/09/03	2022/09/04	1	HDR001		2	2	0	0	0	1200.00
1	BUF001	07	1	0	MOS00	Buffet Breakfast - Adults				2022/09/04	2022/09/04	1	HDR001		2	0	0	0	0	0.00
2	BUF002	08	1	0	MOS00	Buffet Breakfast - Children				2022/09/04	2022/09/04	1	HDR001		0	0	0	0	0	0.00
3	D202	09	RV	0	MOS00	Mossel Bay High School				2022/09/03	2022/09/04	1	HDR001		2	2	0	0	0	1200.00
4	BUF001	10	1	0	MOS00	Buffet Breakfast - Adults				2022/09/04	2022/09/04	1	HDR001		2	0	0	0	0	0.00
5	BUF002	11	1	0	MOS00	Buffet Breakfast - Children				2022/09/04	2022/09/04	1	HDR001		0	0	0	0	0	0.00
6	D203	12	RV	0	MOS00	Mossel Bay High School				2022/09/03	2022/09/04	1	HDR001		2	2	0	0	0	1000.00
7	BUF001	13	1	0	MOS00	Buffet Breakfast - Adults				2022/09/04	2022/09/04	1	HDR001		2	0	0	0	0	0.00
8	BUF002	14	1	0	MOS00	Buffet Breakfast - Children				2022/09/04	2022/09/04	1	HDR001		0	0	0	0	0	0.00
9	D204	15	RV	0	MOS00	Mossel Bay High School				2022/09/03	2022/09/04	1	HDR001		2	2	0	0	0	1000.00
10	BUF001	16	1	0	MOS00	Buffet Breakfast - Adults				2022/09/04	2022/09/04	1	HDR001		2	0	0	0	0	0.00

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close



Setup Procedures – Room Types

Room Type Setup

1	Single
2	Double
3	Family
4	Conferencing
5	Wedding
6	2 Bedroom Chalet
7	3 Bedroom Chalet
8	Camping
9	Dorm Room Bed

Code:

Description:

The setup and use of Room Types are optional, and not at all mandatory to set up or use.

The 'Room Type' is used to group similar rooms (The room or per person rate, as well as the number of people to be accommodated) together for use with the Reservation Quotation feature.

Per Room Master File, the relevant Room Type option is selected and saved.

Edit Room

Code:

Description:

General | Details | Financial | User Defined Fields | Pastel Interface | Fixed Add Costs | Activity Tracker

Branch: Show On Grid: ☒

Guest Tariff: Force Guest Tariff: ☐ Monthly Billed Item: ☐

Show On Web: ☐

One Day Booking: ☐

Event Venue: ☐

Department:

Room Type: Exclude from Reports (Utilization and Rental Statistics): ☐

Subhire Item: ☐



Setup Procedures – Room Types

When a quotation is to be created for specific room types, this option is selected from the 'Add Room / Charge' button.

The specific Room Type can now be selected.

The screenshot displays the Hospitality software interface for creating a quotation. The main window shows a 'Quotation' form with fields for Customer Code (AFR001), Country (South Africa), Start Date (2022/05/12), End Date (2022/05/29), and Order Number. The 'Add Room / Charge' button is highlighted with a red arrow. A context menu is open over this button, showing options: 'SELECT ROOM', 'SELECT ROOM TYPE', 'SELECT CHARGE', and 'SELECT ACTIVITY CODE'. The 'SELECT ROOM TYPE' option is selected, and a red arrow points to the 'Room Type' dialog box. The dialog box shows a list of room types: 1 Single, 2 Double, 3 Family, 4 Conferencing, 5 Wedding, 6 2 Bedroom Chalet, 7 3 Bedroom Chalet, 8 Camping, and 9 Dorm Room Bed. The 'Double' room type is selected. The 'Accept' button at the bottom of the dialog is highlighted with a red arrow.

Quotation

Quotation **New Quotation** Copy Quotation Description: **Test May 2022** Status: Quotation

Customer Code: AFR001 Africa Tours

Country: South Africa

Start Date: 2022/05/12 End Date: 2022/05/29

Order Number:

Reservation Type:

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Room/Item QL DE RQ Guest Name / Item 1

SELECT ROOM

SELECT ROOM TYPE

SELECT CHARGE

SELECT ACTIVITY CODE

Accept

PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation

DC - Duration Charged GT - Guest/Item Total Available Unavailable

DE - Department RQ - Room Type Qty

Room Type

Search

Search By: Code

Search For:

Code Description

1 Single

2 Double

3 Family

4 Conferencing

5 Wedding

6 2 Bedroom Chalet

7 3 Bedroom Chalet

8 Camping

9 Dorm Room Bed

Accept Cancel



The required quantity is set in the 'RQ' column, and the number of Adults and / or Children selected.

The Accommodation Package Items linked to the selected Guest Tariff, will automatically be loaded to quotation too.

Producing the quotation, the Room Type is indicated, as well as the quantity as set in the 'RQ' column.

Date	Description	Duration	Qty	Tax	Incl
2022/05/12	Double Africa Tours - Guests: 2	17	4	R2 254.74	R18 360.00
2022/05/12	Buffet Breakfast - Adults	0	34	R0.00	R0.00
	Full Buffet inclusive of coffee, tea or juice.				
2022/05/12	Buffet Breakfast - Children up to 15	0	0	R0.00	R0.00
	Tourism Levy	0	0	R0.00	R161.05



Setup Procedures – Activity Grouping

Activity Grouping options are to be created to be displayed on Quotation Layout 3 and 4, as well as the Activity Sheet.

These are created to assess WHAT is happening. Example may include:

- ✓ **Catering**

This Grouping can be linked to menu and bar charges, and when selected on the quotation, the 'Grouping' will automatically be displayed as a heading on the Quotation document, and the charge or charges below it.

- ✓ **Equipment**

To be linked to charges such as a Projector; Multi-Plug; Extension Cord; PA System, etc.

- ✓ **Events / Activities**

Event Charges, such as the Zip Line Activity; White Water Rafting; Exhibitions; Cave Tours etc. will be linked to this Grouping option.

- ✓ **Accommodation**

All Types of Rooms used for accommodation can be linked to this Grouping option.

- ✓ **Venue**

To be linked to Conference Rooms and Wedding Venues.

- ✓ **Room Set-up**

Will be used in conjunction with Activity Codes to display a certain requested layout for the Conference Room Layout.

QUOTATION		Date :	2022/10/07																																																																																																																																																								
 Mossel Bay High School PO Box 789654 Mossel Bay 6500 VAT No :		Start Date :	2022/09/03																																																																																																																																																								
		End Date :	2022/09/04																																																																																																																																																								
		Quote # :	100																																																																																																																																																								
	Oasis Lodge 77 Long Beach Road Long Beach Mossel Bay 6500 South Africa Tel : 044 123456789 Fax : 044 123456789 Email : oasis@restaurant.com VAT No : 123456789																																																																																																																																																										
<table border="1"><thead><tr><th colspan="5">Accommodation</th></tr><tr><th>Start</th><th>End</th><th>No's</th><th>Description</th><th>Unit Price</th><th>Tax</th><th>Incl Amount</th></tr></thead><tbody><tr><td colspan="7">3 September 2022</td></tr><tr><td colspan="7">Hotel</td></tr><tr><td colspan="7">Accommodation</td></tr><tr><td>00:00</td><td>00:00</td><td>2</td><td>Room 201 - Double</td><td>R1 200.00</td><td>R147.37</td><td>R1 200.00</td></tr><tr><td>00:00</td><td>00:00</td><td>2</td><td>Room 202 - Double</td><td>R1 200.00</td><td>R147.37</td><td>R1 200.00</td></tr><tr><td>00:00</td><td>00:00</td><td>2</td><td>Room 203 - Double</td><td>R1 000.00</td><td>R122.81</td><td>R1 000.00</td></tr><tr><td>00:00</td><td>00:00</td><td>2</td><td>Room 204 - Double</td><td>R1 000.00</td><td>R122.81</td><td>R1 000.00</td></tr><tr><td colspan="5">Total For: 3 September 2022</td><td>R540.36</td><td>R4 400.00</td></tr><tr><td colspan="5">Total For: Accommodation (# Included in Accommodation/Event Package)</td><td>R540.36</td><td>R4 400.00</td></tr><tr><td colspan="7">Events</td></tr><tr><td>Start</td><td>End</td><td>No's</td><td>Description</td><td>Unit Price</td><td>Tax</td><td>Incl Amount</td></tr><tr><td colspan="7">3 September 2022</td></tr><tr><td colspan="7">Conference Room 1</td></tr><tr><td colspan="7">Conference</td></tr><tr><td>00:00</td><td>00:00</td><td>8</td><td>Conference Room 1</td><td>R7 500.00</td><td>R921.05</td><td>R7 500.00</td></tr><tr><td colspan="5">Total For: 3 September 2022</td><td>R921.05</td><td>R7 500.00</td></tr><tr><td colspan="7">4 September 2022</td></tr><tr><td colspan="7">Conference Room 1</td></tr><tr><td colspan="7">Conference</td></tr><tr><td>00:00</td><td>00:00</td><td>8</td><td>Conference Room 1</td><td>R7 500.00</td><td>R921.05</td><td>R7 500.00</td></tr></tbody></table>				Accommodation					Start	End	No's	Description	Unit Price	Tax	Incl Amount	3 September 2022							Hotel							Accommodation							00:00	00:00	2	Room 201 - Double	R1 200.00	R147.37	R1 200.00	00:00	00:00	2	Room 202 - Double	R1 200.00	R147.37	R1 200.00	00:00	00:00	2	Room 203 - Double	R1 000.00	R122.81	R1 000.00	00:00	00:00	2	Room 204 - Double	R1 000.00	R122.81	R1 000.00	Total For: 3 September 2022					R540.36	R4 400.00	Total For: Accommodation (# Included in Accommodation/Event Package)					R540.36	R4 400.00	Events							Start	End	No's	Description	Unit Price	Tax	Incl Amount	3 September 2022							Conference Room 1							Conference							00:00	00:00	8	Conference Room 1	R7 500.00	R921.05	R7 500.00	Total For: 3 September 2022					R921.05	R7 500.00	4 September 2022							Conference Room 1							Conference							00:00	00:00	8	Conference Room 1	R7 500.00	R921.05	R7 500.00
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Setup Procedures – Activity Grouping

The respective Activity Grouping Options can be linked to Rooms and Charges in the 'Activity Tracker' tab of the Room and Charge Master File.

An 'Activity Description' can also be captured per Room and Charge, and this description will automatically be displayed on the 'Note' field of the selected charge or room on the Quotation and Activity Sheet.

The 'Edit Charge' window displays the 'Activity Tracker' tab. The 'Code' field is 'CRE001' and the 'Description' is 'Refreshments Day 1 - Session 1'. The 'Grouping' dropdown is set to 'CATERING', and the 'Activity Description' field is highlighted with a red box. The 'Activity Description' field contains the following options:

- Option A
Coffee and / or tea
Variety of Muffins
- Option B
Coffee and / or tea
Scones; Jam and Cheese
- Option C
Coffee and / or Tea
Savoury Biscuits and cheese

At the bottom, there are buttons for 'Accept', 'Cancel', and 'View Audit Log'. The 'Pastel Inventory Code' is 'CRE001' and the 'Multi Store code for retrieving Cost Price' is empty.

The 'Edit Room' window displays the 'Activity Tracker' tab. The 'Code' field is 'C001' and the 'Description' is 'Chalet 1 - 2 Bedroom'. The 'Grouping' dropdown is set to 'ACCOM', and the 'Activity Description' field is highlighted with a red box. The 'Activity Description' field is currently empty. At the bottom, there are buttons for 'Accept' and 'Cancel'.



Setup Procedures – Activity Grouping

Per Line Item, the Activity Grouping Option and 'Activity Description' - as entered on the charge or room master file - will automatically be inserted on the quotation's 'Note' field.

However: Please Note that the settings can be changed on the quotation without influencing the original settings on the room or charge master file.

On 'Quotation document Layout 3', the Grouping options will be displayed in the dark green headers.

The note captured to the Item's Master File, will be displayed below the item on the quote document.

Quotation

Quotation Description : SSS Conference May 2022 Status : Quotation

Note :

Option A
Coffee and / or tea
Variety of Muffins

Option B
Coffee and / or tea
Scones, Jam and Cheese

Location Report Grouping Time Start Time End

LHREST CATERING 12:00 12:00

Close

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	
0001	0	RV	0	SSS00	Southern Shore [No Title]				2022/05/12	2022/05/13	1	C2B001		2	2	0	0	0	700.00
1	BUF001	0	1	0	SSS00	Buffet Breakfast - Adults			2022/05/12	2022/05/13	1	C2B001		2	0	0	0	0	0.00
2	BUF002	0	1	0	SSS00	Buffet Breakfast - Children			2022/05/12	2022/05/13	1	C2B001		0	0	0	0	0	0.00
3	CRE001	0	1	0	SSS00	Refreshments Day 1 - Session 1			2022/05/12	2022/05/12	0			0	0	0	0	0	110.00
									2022/05/12	2022/05/12	0			0	0	0	0	0	0.00
									2022/05/12	2022/05/12	0			0	0	0	0	0	0.00
									2022/05/12	2022/05/12	0			0	0	0	0	0	0.00
									2022/05/12	2022/05/12	0			0	0	0	0	0	0.00
									2022/05/12	2022/05/12	0			0	0	0	0	0	0.00
									2022/05/12	2022/05/12	0			0	0	0	0	0	0.00

Accept << First < Previous Next >> Last >> Quotation Close

QUOTATION



Southern Shores Shipping Company
PO Box 748474
Cape Town
1111

VAT No : 11122233444

Date : 2022/05/12
Start Date : 2022/05/12
End Date : 2022/05/13
Quote # : 96

Oasis Lodge
77 Long Beach Road
Long Beach
Mossel Bay
6500
South Africa
Tel : 044 123456789
Fax : 044 123456789
Email : oasis@restaurant.com
VAT No : 123456789

12 May 2022

Accommodation	Start	End	No's	Description	Unit Price	Tax	Incl Amount
Chalet Area	00:00	00:00	2	Chalet 1 - 2 Bedroom	R700.00	R91.30	R700.00

Catering	Start	End	No's	Description	Unit Price	Tax	Incl Amount
Lighthouse Restaurant	00:00	00:00	2	Refreshments Day 1 - Session 1 Option A Coffee and / or tea Variety of Muffins Option B Coffee and / or tea Scones, Jam and Cheese Option C Coffee and / or Tea Savoury Biscuits and cheese	R55.00	R14.35	R110.00

Note Captured on the Charge Master File

Total For: 12 May 2022 R105.65 R810.00
(* Non-financial transactions. Not included in Grand Total)
(# Included in Accommodation/Event Package)



Setup Procedures – Activity Locations

Activity **Location** = 'Where'.

All possible locations where activities can take place at your facility, and even accommodation locations, are to be set up.

Examples may include:

- ✓ Conference Room 1
- ✓ Conference Room 2
- ✓ Wedding Chapel
- ✓ Falcon Woods – Zip Line
- ✓ Falcon River – Rafting
- ✓ Tasting Room



Setup Procedures – Activity Locations

Default 'Locations' can then be linked to the respective room and charge master files.

Edit Room

Code: C001
Description: Chalet 1 - 2 Bed

General | Details

Location: CHALET
Grouping: ACCOM

Activity Description:

Passport Number

Select Location

Code	Description
AMPHI	Amphi Theatre
CAMPING	Camping Area
CHALET	Chalet Area
CONFER1	Conference Room 1
CONFER2	Conference Room 2
CONFER3	Conference Room 3
CONFER4	Conference Room 4
DORM	Dorm Rooms
EXHIBITION	Exhibition Centre
HOTEL	Hotel
LHREST	Lighthouse Restaurant
PICNIC	Picnic Area
RIVER	River - White Water Rafting
SAFARI	Safari Lodge Inc
WED	Wedding Venue
WOODS	Woods - Zip Line

Accept | Cancel

Search By: Code | Search For:

Activity Tracker

Edit Charge

Code: PLU001
Description: Picnic Lunch
Barcode:

☒ Display On Invoice
☐ Service Charge Item
☐ Event Item

☒ Physical Item
☐ Use Custom Rate
☐ Master Price
☐ Blocked

General | Properties | Voucher | Price Update | Foreign Currency | **Activity Tracker**

Location: PICNIC | Picnic Area
Grouping: CATERING | Catering

Activity Description:

Picnic Basket:
Bread, cheese, cold meat, pickles and jams.
Cocktail gourmet pies and sausages.
Grape Juice

Accept | Cancel

View Audit Log | Pastel Inventory Code: PLU001 | Picnic Lunch | Multi Store code for retrieving Cost Price:



Setup Procedures – Activity Locations

Quotation

Quotation: 96 Copy Quotation Description: SSS Conference May 2022 Status: Quotation

Note:
Picnic Basket:
Bread, cheese, cold meat, pickles and jams.
Cocktail gourmet pies and sausages.
Grape Juice

Location: PICNIC Report Grouping: CATERING Time Start: 1.00 Time End: 2.00

Room Type To Room

Room/Item	Q	L	E	R	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	
CRE001	96	1	0	SSS00	Refreshments Day 1 - Session						2022/05/12	2022/05/12	1				4	0	0	0	220.00
FLU001	60	ST	0	SSS00	Room 201 - Double						2022/05/12	2022/05/12	1				2	0	0	0	356.00
C001	53	HV	0	SSS00	Southern Shores Shipping						2022/05/12	2022/05/12	1	C28001		2	2	0	0	700.00	
BUF001	54	1	0	SSS00	Buffet Breakfast - Adults						2022/05/12	2022/05/13	1	C28001		2	0	0	0	0.00	
BUF002	55	1	0	SSS00	Buffet Breakfast - Children						2022/05/12	2022/05/13	1	C28001		0	0	0	0	0.00	
D201	57	HV	0	SSS00	Southern Shores Shipping						2022/05/12	2022/05/13	1	HDR001	2	2	2	0	0	1200.00	
BUF001	58	1	0	SSS00	Buffet Breakfast - Adults						2022/05/12	2022/05/13	1	HDR001		2	0	0	0	0.00	
BUF002	59	1	0	SSS00	Buffet Breakfast - Children						2022/05/12	2022/05/13	1	HDR001		0	0	0	0	0.00	
											2022/05/12	2022/05/12	0			0	0	0	0	0.00	
											2022/05/12	2022/05/12	0			0	0	0	0	0.00	
											2022/05/12	2022/05/12	0			0	0	0	0	0.00	
											2022/05/12	2022/05/12	0			0	0	0	0	0.00	

Accept JPP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged ST - Guest/Item Total Available Unavailable
DE - Department RG - Room Type Qty

Adding a charge or room to the quotation, the set 'Location' will automatically be added to the line item's 'Note' field, but can be changed if the requested location for this quotation will differ from the normal one.

On Quotation Document layout 2, the 'Locations' will be displayed under each charge and room respectively, but no Activity Grouping is linked to this document layout.

QUOTATION

Oasis Lodge
Southern Shores Shipping Company
PO Box 748474
Cape Town
1111

VAT No : 111222333444

Date : 2022/05/12
Start Date : 2022/05/12
End Date : 2022/05/13
Quote # : 96

Oasis Lodge
77 Long Beach Road
Long Beach
Mosel Bay
6500
South Africa
Tel : 044 123456789
Fax : 044 123456789
Email : oasis@restaurant.com
VAT No : 123456789

12 May 2022	Start	End	No's	Description	Unit Price	Tax	Incl Amount
00:00	00:00	2	Chalet 1 - 2 Bedroom		R700.00	R91.30	R700.00
			Chalet Area				
00:00	00:00	2	Room 201 - Double		R1 200.00	R147.37	R1 200.00
			Hotel				
10:00	10:30	4	Refreshments Day 1 - Session 1		R55.00	R28.70	R220.00
			Lighthouse Restaurant				
			Option A	Coffee and / or tea Variety of Muffins			
			Option B	Coffee and / or tea Scones, Jam and Cheese			
			Option C	Coffee and / or Tea Savoury Biscuits and cheese			
13:00	14:00	4	Picnic Lunch		R89.00	R46.43	R356.00
			Picnic Area				
			Picnic Basket: Bread, cheese, cold meat, pickles and jams. Cocktail gourmet pies and sausages. Grape Juice				

On Quotation Document layout 3, the 'Locations' will be grouped under the 'Activity Grouping' heading it is linked to.

QUOTATION

Oasis Lodge
Southern Shores Shipping Company
PO Box 748474
Cape Town
1111

VAT No : 111222333444

Date : 2022/05/12
Start Date : 2022/05/12
End Date : 2022/05/13
Quote # : 96

Oasis Lodge
77 Long Beach Road
Long Beach
Mosel Bay
6500
South Africa
Tel : 044 123456789
Fax : 044 123456789
Email : oasis@restaurant.com
VAT No : 123456789

12 May 2022	Start	End	No's	Description	Unit Price	Tax	Incl Amount
00:00	00:00	2	Chalet 1 - 2 Bedroom		R700.00	R91.30	R700.00
			Chalet Area				
00:00	00:00	2	Room 201 - Double		R1 200.00	R147.37	R1 200.00
			Hotel				
10:00	10:30	4	Refreshments Day 1 - Session 1		R55.00	R28.70	R220.00
			Lighthouse Restaurant				
			Option A	Coffee and / or tea Variety of Muffins			
			Option B	Coffee and / or tea Scones, Jam and Cheese			
			Option C	Coffee and / or Tea Savoury Biscuits and cheese			
13:00	14:00	4	Picnic Lunch		R89.00	R46.43	R356.00
			Picnic Area				
			Picnic Basket: Bread, cheese, cold meat, pickles and jams. Cocktail gourmet pies and sausages. Grape Juice				

Total For: 12 May 2022
(* Non-financial transactions. Not included in Grand Total)
(\$ Included in Accommodation/Event Package)

R315.80 R2 476.00



Setup Procedures – Charges

Edit Charge

Code: 0FA001
Description: Overflow Accommodation
Barcode:

☒ Display On Invoice
☐ Service Charge Item
☐ Event Item

☒ **Physical Item**
☒ **Use Custom Rate**
☐ Master Price
☐ Blocked

General | Properties | Voucher | Price Update | Foreign Currency | Activity Tracker

Allow Tax: ☒ 15 - Vat - Standard rated (15%)

Cost Price Excl: 0.00 Markup %: 0.00
Charge Incl: 0.00 Charge Excl: 0.00

User Defined Field 1:
User Defined Field 2:
User Defined Field 3:
User Defined Field 4:
User Defined Field 5:

Customer Category: 0 - No category

Customer Category - Implemented at Reservation and Group Additional Cost when selecting Charges. The Customer Category as setup for the Customer/ Guest will be used to only display Charges with the same Customer Category selected here. Default is No Category for Charge. (Activated per Customer)

Accept | Pastel Inventory Code: | Cancel
View Audit Log | Multi Store code for retrieving Cost Price: |

When charges are added to the reservation quotation, the price is fixed and cannot be changed at all.

However: There are exceptions to the rule where a specific charge's total might fluctuate from one quotation to another.

In this case, such a charge will be classified as a 'Custom Rate' directly on the charge master file.

Important: A Charge can only be marked as a Custom Rate item if the 'Physical Item' checkbox is unticked.



Setup Procedures – Charges

When the charge is added to the Quotation, the rate can be changed as required.

19	S104	21 RV	0	DIS001	Discover SA and Beyond	2022/05/05	2022/05/06	1	HSR001	1	1	0	0	0	0	0	0	900.00
20	BUF001	22 1	0	DIS001	Buffet Breakfast - Adults	2022/05/05	2022/05/06	1	HSR001	1	0	0	0	0	0	0	0	0.00
21	OFA001	0	0	DIS001	Overflow Accommodation	2022/05/05	2022/05/05	1		1	0	0	0	0	0	0	0	0.00

Quotation

Quotation

94

Copy Quotation

Description :

Test

Status :

Quotation

Customer Code :

DIS001

Discover SA and Beyond

Country :

South Africa

Start Date :

2022/05/05

End Date :

2022/05/06

Order Number :

Reservation Type :

2

Bed and Breakfast

Apply Service Charge

☒

Create Events As Add Cost

☒

Consolidate Acc Packages

☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Add Room / Charge	Change Room	Select Guest	Room Type To Room	Add Country *	Clear Tariff *	Select Tariff *	Select Type *	Select Child Rate 1-5 *	Clear Select *										
Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl *
11	BUF001	13	1	0	DIS001	Buffet Breakfast - Adults				2022/05/05	2022/05/06	1	C2B001		2	0	0	0	0.00
12	BUF002	14	1	0	DIS001	Buffet Breakfast - Children				2022/05/05	2022/05/06	1	C2B001		0	0	0	0	0.00
13	S101	15	RV	0	DIS001	Discover SA and Beyond				2022/05/05	2022/05/06	1	HSR001		1	1	0	0	900.00
14	BUF001	16	1	0	DIS001	Buffet Breakfast - Adults				2022/05/05	2022/05/06	1	HSR001		1	0	0	0	0.00
15	S102	17	RV	0	DIS001	Discover SA and Beyond				2022/05/05	2022/05/06	1	HSR001		1	1	0	0	900.00
16	BUF001	18	1	0	DIS001	Buffet Breakfast - Adults				2022/05/05	2022/05/06	1	HSR001		1	0	0	0	0.00
17	S103	19	RV	0	DIS001	Discover SA and Beyond				2022/05/05	2022/05/06	1	HSR001		1	1	0	0	900.00
18	BUF001	20	1	0	DIS001	Buffet Breakfast - Adults				2022/05/05	2022/05/06	1	HSR001		1	0	0	0	0.00
19	S104	21	RV	0	DIS001	Discover SA and Beyond				2022/05/05	2022/05/06	1	HSR001		1	1	0	0	900.00
20	BUF001	22	1	0	DIS001	Buffet Breakfast - Adults				2022/05/05	2022/05/06	1	HSR001		1	0	0	0	0.00
21	OFA001	0	0	0	DIS001	Overflow Accommodation				2022/05/05	2022/05/05	1			1	0	0	0	24360.00

Accept

PP - Per Person

TR - Tariff to Reservation

CR - Charges to Reservation

DC - Duration Charged

GT - Guest/Item Total

Available

Unavailable

DE - Department

RQ - Room Type Qty

<< First

< Previous

Next >

Last >>

Quotation

Close

The 'Total Incl' column for all other charges, not classified as a 'Custom Rate' item, will be disabled, and simply cannot be altered.

IMPORTANT!!

All Charges selected are subject to the Tour Operator Discount, provided that the selected charge is setup at the Customers' Tour Operator Discount tab.

Discounts can also be set up per Customer or Customer Category.

On the quotation, Novtel will check if a discount structure is set up for the selected Customer, and charge the price as set up, and not the normal price.



Setup Procedures – Activity Codes

Activity Codes are created to be linked to the Quotation, and ultimately, the Activity Tracker.

Activity Codes can be used more than once per Quotation since **NO FINANCIAL VALUE** is linked to it.

Activity Codes are used to inform a Department of a specific action to be taken, such as:

- ✓ Setting up the requested layout of the conference room.
- ✓ A note for the restaurant personnel to bill an in-house charge to the reservation, etc.

Activity codes can be added to the quotation by clicking on the 'Add Room / Charge' button, and selecting the last option in this screen.

The specific Activity Code can now be searched for and selected.

The screenshot displays the 'Quotation' setup interface. At the top, the 'Quotation' number is 96, and the description is 'SSS Conference May 2022'. The status is 'Quotation'. Below this, the 'Customer Code' is SSS001, 'Country' is South Africa, 'Start Date' is 2022/05/12, 'End Date' is 2022/05/13, 'Order Number' is blank, and 'Reservation Type' is 2 (Bed and Breakfast). The 'Apply Service Charge', 'Create Events As Add Cost', and 'Consolidate Acc Packages' checkboxes are all checked.

The main table lists items with columns for Room/Item, Charge, Guest, and Guest Name / Item. The items are: CRE001 (Refreshments Day 1 - Se), PLU001 (Picnic Lunch), C001 (Southern Shores Shipping), BUF001 (Buffet Breakfast - Adults), BUF002 (Buffet Breakfast - Children), BUF001 (Buffet Breakfast - Adults), BUF002 (Buffet Breakfast - Children), and VEN001 (Southern Shores Shipping).

The 'Add Room / Charge' button is highlighted with a red arrow. The 'Select Activity Codes' dialog box is open, showing a list of activity codes. The 'U-SHAPE' code is selected, and a red arrow points to the 'Accept' button.

The 'Select Activity Codes' dialog box contains the following table:

Code	Description
BILLING	Billing Action
CINEMA	Room Setup - Cinema
CLEANUP	Cleanup
SNACKS	Refreshments
U-SHAPE	Room Setup - U-Shape
ZIPLINE	Zip Line Activity Extra Timeslot



Setup Procedures – Activity Codes

Quotation

Quotation: 96 Copy Quotation Description: SSS Conference May 2022 Status: Quotation

Note:
Room setup must be completed by 8am sharp.

Location: CONFER1 Report Grouping: SETUP Time Start: 6:00 Time End: 8:00

Close

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
0 CRE001	56	1	0	SSS00	Refreshments Day 1 - Sess					2022/05/12	2022/05/12	1			4	0	0	0	220.00
1 PLU001	60	ST	0	SSS00	Picnic Lunch					2022/05/12	2022/05/12	1			4	0	0	0	356.00
2 C001	53	RV	0	SSS00	Southern Shores Shipping					2022/05/12	2022/05/13	1	C2B001		2	2	0	0	700.00
3 BUF001	54	1	0	SSS00	Buffet Breakfast - Adults					2022/05/12	2022/05/13	1	C2B001		2	0	0	0	0.00
4 BUF002	55	1	0	SSS00	Buffet Breakfast - Children					2022/05/12	2022/05/13	1	C2B001		0	0	0	0	0.00
5 D201	57	RV	0	SSS00	Southern Shores Shipping					2022/05/12	2022/05/13	1	HDR001	2	2	2	0	0	1200.00
6 BUF001	58	1	0	SSS00	Buffet Breakfast - Adults					2022/05/12	2022/05/13	1	HDR001		2	0	0	0	0.00
7 BUF002	59	1	0	SSS00	Buffet Breakfast - Children					2022/05/12	2022/05/13	1	HDR001		0	0	0	0	0.00
8 VEN001	0	ER	0	SSS00	Southern Shores Shipping					2022/05/12	2022/05/13	1	VENUE	2	8	8	0	0	15000.00
9 USHAPE	0	0	0	SSS00	Room Setup - U-Shape					2022/05/12	2022/05/12	0			0	0	0	0	0.00
			0							2022/05/12	2022/05/12	0			0	0	0	0	0.00

Accept

PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

A note and action times can be inserted, and the location and activity grouping selected manually.

On Quotation Document Layout 3, the following will be displayed according to the applied settings:

1. The Activity Grouping
2. The Location
3. Action Times
4. The selected Activity Code
5. Captured Note

Room Setup				Unit Price	Tax	Incl Amount
Start	End	No's	Description			
Conference Room 1						
06:00	08:00	1	Room Setup - U-Shape	R0.00	R0.00	R0.00 *
Room setup must be completed by 8am sharp.						
Total For: 12 May 2022				R1 234.85		R9 976.00
(* Non-financial transactions. Not included in Grand Total)						
(# Included in Accommodation/Event Package)						



Novtel[®]

Hospitality Management

The Quoting System

3

Quotation Layout Options



Quotation Layout Options

Layout 1 – Date and Grand Total

Depending on whether the 'Use Date on Reservation Quotation Document' option is ticked or unticked in the 'Setup – Company - General' tab, the quotation document will either display the following in the first column:

QUOTATION



Oasis Lodge
77 Long Beach Road
Long Beach
Mossel Bay
6500
South Africa
Southern Shores Shipping Company
PO Box 748474
Cape Town
1111

Date : 2022/05/09
Start Date : 2022/06/07
End Date : 2022/06/10
Quotation Number : BQ93

Tel : 044 123456789
Fax : 044 123456789
Email : oasis@restaurant.com
VAT No : 11222333444

Code	Description	Duration	Qty	Tax	Incl
CON010	Conference Lunch Option 1				
	ONE Coffee, tea OR Soft drink Included per person Salad Bar available - Variety of salads				
C001	Chalet 1 - 2 Bedroom Southern Shores Shipping Company - Guests: 4 Room	3	R547.83	R4 200.00	
BUF001	Buffet Breakfast - Adults	0 12	R0.00	R0.00	
	Breakfast is included in the Accommodation Rate. Consists of various fruits, yogurts and cereals. Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish. Pastries and bread. Juice, coffee and tea.				
BUF002	Buffet Breakfast - Children up to 15	0 0	R0.00	R0.00	
C002	Chalet 2 - 2 Bedroom Southern Shores Shipping Company - Guests: 4 Room must be ready daily at 14:00 sharp	3	R515.79	R4 200.00	

Unticked = Item Code

Ticked = The Date

Code	Description	Duration	Qty	Tax	Incl
2022/06/07	Conference Lunch Option 1	0 14	R365.22	R2 800.00	
	ONE Coffee, tea OR Soft drink Included per person Salad Bar available - Variety of salads				
2022/06/07	Chalet 1 - 2 Bedroom Southern Shores Shipping Company - Guests: 4 Room	3	R547.83	R4 200.00	
2022/06/07	Buffet Breakfast - Adults	0 12	R0.00	R0.00	
	Breakfast is included in the Accommodation Rate. Consists of various fruits, yogurts and cereals. Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish. Pastries and bread. Juice, coffee and tea.				
2022/06/07	Buffet Breakfast - Children up to 15	0 0	R0.00	R0.00	
2022/06/07	Chalet 2 - 2 Bedroom Southern Shores Shipping Company - Guests: 4 Room must be ready daily at 14:00 sharp	3	R515.79	R4 200.00	



Quotation Layout Options

Layout 2 - Group By Day + Day Total

1. Date and Grand Total

2. By Day + Day Total 

3. By Day/Report Grouping/Location + Day Total

4. By Type/Day/Location/Report Grouping + Day Total

CLOSE

The report is sorted by Day and Location.

It displays the total Tax and including amount per day.

The Unit price per line, if available, is displayed.

QUOTATION

Southern Shores Shipping Company

PO Box 748474

Cape Town

1111

VAT No :

111222333444

Date : 2022/05/09

Start Date : 2022/06/07

End Date : 2022/06/10

Quote # : 93

Oasis Lodge

77 Long Beach Road

Long Beach

Mossel Bay

6500

South Africa

Tel : 044 123456789

Fax : 044 123456789

Email : oasis@restaurant.com

VAT No : 123456789

7 June 2022

Start	End	No's	Description	Unit Price	Tax	InclAmount
00:00	00:00	4	Chalet 1 - 2 Bedroom Chalet Area Room	R 1 400.00	R 182.61	R 1 400.00
00:00	00:00	4	Chalet 2 - 2 Bedroom Chalet Area Room must be ready daily at 14:00 sharp	R 1 400.00	R 171.93	R 1 400.00
00:00	00:00	2	Room 201 - Double Hotel	R 1 200.00	R 147.37	R 1 200.00
00:00	00:00	1	Room 101 - Single Hotel	R 900.00	R 110.53	R 900.00
00:00	00:00	1	Room 102 - Single Hotel	R 900.00	R 110.53	R 900.00
07:00	08:00	2	Room 202 - Double Hotel	R 1 200.00	R 147.37	R 1 200.00
13:00	14:00	14	Conference Lunch Option 1 Lighthouse Restaurant	R 200.00	R 91.30	R 700.00

Page : 1

		ONE Coffee, tea OR Soft drink Included per person Salad Bar available - Variety of salads				
00:00	00:00	14	Conference Room 1 Conference Room 1	R 11 250.00	R 1 381.58	R 11 250.00
Total For: 7 June 2022				R 2 343.22	R 18 950.00	
(* Non-financial transactions. Not included in Grand Total) (# Included in Accommodation/Event Package)						
8 June 2022						
Start	End	No's	Description	Unit Price	Tax	Incl Amount
00:00	00:00	4	Chalet 1 - 2 Bedroom Chalet Area Room	R 1 400.00	R 182.61	R 1 400.00
00:00	00:00	4	Chalet 2 - 2 Bedroom Chalet Area Room must be ready daily at 14:00 sharp	R 1 400.00	R 171.93	R 1 400.00
00:00	00:00	2	Room 201 - Double Hotel	R 1 200.00	R 147.37	R 1 200.00
00:00	00:00	1	Room 101 - Single Hotel	R 900.00	R 110.53	R 900.00
00:00	00:00	1	Room 102 - Single Hotel	R 900.00	R 110.53	R 900.00
07:00	08:00	2	Room 202 - Double Hotel	R 1 200.00	R 147.37	R 1 200.00
07:00	08:00	4	Buffet Breakfast - Adults Lighthouse Restaurant Breakfast is included in the Accommodation Rate. Consists of various fruits, yogurts and cereals. Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish. Pastries and bread. Juice, coffee and tea.	R 0.00	R 0.00	R 0.00#
07:00	08:00	0	Buffet Breakfast - Children up to 15 Lighthouse Restaurant	R 0.00	R 0.00	R 0.00#
07:00	08:00	4	Buffet Breakfast - Adults Lighthouse Restaurant	R 0.00	R 0.00	R 0.00#
Page : 2						



Quotation Layout Options

Layout 3 - Group By Day/Report Grouping/Location + Day Total

1. Date and Grand Total

2. By Day + Day Total

3. By Day/Report Grouping/Location + Day Total 

4. By Type/Day/Location/Report Grouping + Day Total

CLOSE

The report is sorted by Day, Report Grouping and Location.

It displays the total Tax and including amount per day.

The Unit price per line, if available, is displayed.

QUOTATION							
 Oasis Lodge Southern Shores Shipping Company PO Box 748474 Cape Town 1111			Date :	2022/05/09			
			Start Date :	2022/06/07			
			End Date :	2022/06/10			
			Quote # :	93			
			Oasis Lodge 77 Long Beach Road Long Beach Mosel Bay 6500 South Africa				
			Tel : 044 123456789				
			Fax : 044 123456789				
			Email : oasis@restaurant.com				
VAT No :			111222333444				
7 June 2022							
Accommodation	Start	End	No's	Description	Incl Amount		
<u>Chalet Area</u>							
00:00	00:00	4	Chalet 1 - 2 Bedroom Room	R1 400.00 R182.61	R1 400.00		
00:00	00:00	4	Chalet 2 - 2 Bedroom Room must be ready daily at 14:00 sharp	R1 400.00 R171.93	R1 400.00		
<u>Hotel</u>							
00:00	00:00	2	Room 201 - Double	R1 200.00 R147.37	R1 200.00		
00:00	00:00	1	Room 101 - Single	R900.00 R110.53	R900.00		
00:00	00:00	1	Room 102 - Single	R900.00 R110.53	R900.00		
07:00	08:00	2	Room 202 - Double	R1 200.00 R147.37	R1 200.00		
Catering	Start	End	No's	Description	Incl Amount		
<u>Lighthouse Restaurant</u>							
13:00	14:00	14	Conference Lunch Option 1 ONE Coffee, tea OR Soft drink Included per person Salad Bar available - Variety of salads	R200.00 R91.30	R700.00		

Conference							
Start	End	No's	Description	Unit Price	Tax	Incl Amount	
Conference Room 1							
00:00	00:00	14	Conference Room 1	R11 250.00	R1 381.58	R11 250.00	
Total For: 7 June 2022				R2 343.22		R18 950.00	
(* Non-financial transactions. Not included in Grand Total) (# Included in Accommodation/Event Package)							
8 June 2022							
Accommodation							
Start	End	No's	Description	Unit Price	Tax	Incl Amount	
Chalet Area							
00:00	00:00	4	Chalet 1 - 2 Bedroom Room	R1 400.00	R182.61	R1 400.00	
00:00	00:00	4	Chalet 2 - 2 Bedroom Room must be ready daily at 14:00 sharp	R1 400.00	R171.93	R1 400.00	
Hotel							
00:00	00:00	2	Room 201 - Double	R1 200.00	R147.37	R1 200.00	
00:00	00:00	1	Room 101 - Single	R900.00	R110.53	R900.00	
00:00	00:00	1	Room 102 - Single	R900.00	R110.53	R900.00	
07:00	08:00	2	Room 202 - Double	R1 200.00	R147.37	R1 200.00	
Catering							
Start	End	No's	Description	Unit Price	Tax	Incl Amount	
Lighthouse Restaurant							
07:00	08:00	4	Buffet Breakfast - Adults Breakfast is included in the Accommodation Rate. Consists of various fruits, yogurts and cereals. Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish. Pastries and bread. Juice, coffee and tea.	R0.00	R0.00	R0.00	#
07:00	08:00	0	Buffet Breakfast - Children up to 15	R0.00	R0.00	R0.00	#
07:00	08:00	4	Buffet Breakfast - Adults	R0.00	R0.00	R0.00	#
07:00	08:00	0	Buffet Breakfast - Children up to 15	R0.00	R0.00	R0.00	#



Quotation Layout Options

Layout 4 - By Type / Day/ Location / Report Grouping + Day Total

1. Date and Grand Total
2. By Day + Day Total
3. By Day/Report Grouping/Location + Day Total
4. By Type/Day/Location/Report Grouping + Day Total ✓
CLOSE

QUOTATION		Date : 2022/10/06				
 Discover SA and Beyond PO Box 987 Cape Town 1111 VAT No : 987654321		Start Date : 2022/05/05				
		End Date : 2022/05/06				
		Quote # : 94				
		Oasis Lodge 77 Long Beach Road Long Beach Mossel Bay 6500 South Africa Tel : 044 123456789 Fax : 044 123456789 Email : oasis@restaurant.com VAT No : 123456789				
Accommodation						
Start End No's Description Unit Price Tax Incl Amount						
5 May 2022						
Hotel						
Accommodation						
00:00	00:00	2	Room 201 - Double	R700.00	R85.96	R700.00
00:00	00:00	2	Room 202 - Double	R700.00	R85.96	R700.00
00:00	00:00	2	Room 203 - Double	R850.00	R104.39	R850.00
00:00	00:00	2	Room 204 - Double	R850.00	R104.39	R850.00
00:00	00:00	1	Room 101 - Single	R900.00	R110.53	R900.00
00:00	00:00	1	Room 102 - Single	R900.00	R110.53	R900.00
00:00	00:00	1	Room 103 - Single	R900.00	R0.00	R900.00
00:00	00:00	1	Room 104 - Single	R900.00	R110.53	R900.00
Total For: 5 May 2022				R712.29		R6 700.00
Total For: Accommodation				R712.29		R6 700.00
(* Included in Accommodation/Event Package)						
Events						
Start End No's Description Unit Price Tax Incl Amount						
5 May 2022						



Novtel[®]

Hospitality Management

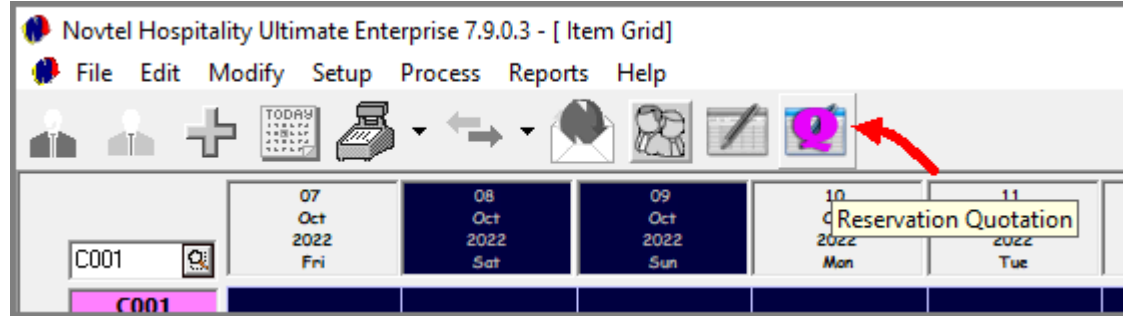
The Quoting System

4

Creating a Quotation in Novtel



Creating a Quotation in Novtel



The Quoting system is accessed by clicking on this icon:

Quotation

When a new Quotation is created, the wording will always be displayed as 'New Quotation'.

Description

A Unique description for this reservation quotation must be entered in this field, which is easily identifiable when the quotation is searched for.

Quotation

Quotation Description : SSS Conference June 2022 Status : Quotation

Status

By default, the status of a new Quotation will always be displayed as 'Quotation'.

As we progress with this set of manuals, we will explain the use of each status.

Status :

- Quotation
- Accepted
- Completed
- Expired
- Cancelled



Customers

Number	Description	Telephone	Fax	Country
SSS001	Southern Shores Shipping	021 333 444 555		South Africa
STA004	Johan Grabe			
STA005	Annalie Grabe			
STA006	Zanthe Hone			
WES001	West, John	044 123456789		South Africa

Refresh <F5>
 Add New <F6>
 Edit

Search:

☒ Number
 ☐ Description

Select <F7>
 Close

By clicking on the Customer Search option, a new Customer Master File can be created if it does not yet exist in Novtel.

By clicking 'Add New', all details for this Customer can be created. After saving the newly created Customer master file, it can be selected.

Alternatively: If the Customer to be linked to this Quotation already exists in Novtel, the Customer is searched for and selected.

In this case, we will simply select the 'Number' search option and enter the Customer Code – or part thereof – in the search field.

When matched by Novtel, the Customer Master File will be displayed at the top of the Customers Window, and can be selected by clicking on it, and clicking 'Select'.



Creating a Quotation in Novtel

Quotation

Quotation **New Quotation** Copy Quotation Description : **SSS Conference June 2022**

Customer Code : SSS001 Southern Shores Shipping Company

Country : South Africa Apply Service Charge ☒

The Customer's Code and Description – as created - and Country selected on the Customer Master File, is displayed in these 3 respective fields.

Please note that the Customer selected here, will be liable for the payment of all accommodation; meals; venue hire; additional charges and tickets to events – if selected on the quotation.

The Customer Code and Description for all reservations WILL be the same than this Customer Code and Description, and therefore – when the quotation is accepted and converted into reservations, the deposit will be raised on the 'Group Container' booking only.

All payments will also be processed against the Group Container Booking – as we will explain in future manuals and videos.

This Customer is also referred to as the Group Owner.



By default, the current date will be displayed as the start date, and the end date as the very next day. However, the requested end date can now be selected first, followed by the start date.





Clicking on the 'Add Room / Charge' button, one of 4 options can be accessed, namely:

- ✓ Select Room
- ✓ Select Room Type
- ✓ Select Charge
- ✓ And Select Activity Code

To add specific rooms to the quotation, click on the 'Select Room' option.

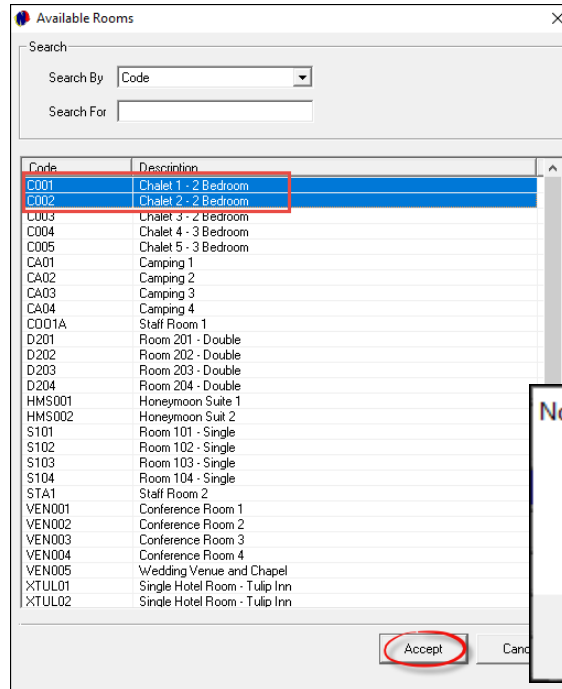
The 'Available Rooms' window is opened, and specific available rooms can be selected to be added to this quotation – including a Venue if required.

In this case, the Customer requested a quote on accommodation and conference facilities as follows:

- ✓ 2 Rooms accommodating 4 Adults each (2 Bedroom Chalet)
- ✓ 2 Rooms accommodating 2 Adults each (Hotel Double Room)
- ✓ And 2 Rooms accommodating single persons (Hotel Single Room)
- ✓ One Conference Room is also required



Creating a Quotation in Novtel



Available Rooms

Search

Search By: Code

Search For:

Code	Description
C001	Chalet 1 - 2 Bedroom
C002	Chalet 2 - 2 Bedroom
C003	Chalet 3 - 2 Bedroom
C004	Chalet 4 - 3 Bedroom
C005	Chalet 5 - 3 Bedroom
CA01	Camping 1
CA02	Camping 2
CA03	Camping 3
CA04	Camping 4
CO01A	Staff Room 1
D201	Room 201 - Double
D202	Room 202 - Double
D203	Room 203 - Double
D204	Room 204 - Double
HMS001	Honeymoon Suite 1
HMS002	Honeymoon Suite 2
S101	Room 101 - Single
S102	Room 102 - Single
S103	Room 103 - Single
S104	Room 104 - Single
STA1	Staff Room 2
VEN001	Conference Room 1
VEN002	Conference Room 2
VEN003	Conference Room 3
VEN004	Conference Room 4
VEN005	Wedding Venue and Chapel
XTUL01	Single Hotel Room - Tulip Inn
XTUL02	Single Hotel Room - Tulip Inn

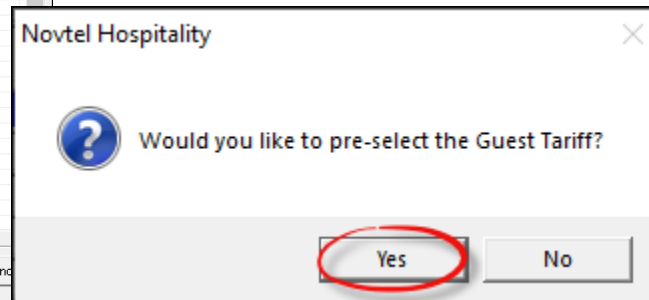
Accept Cancel

Now please note that different types of rooms are charged at different rates.

By selecting the same type of room, the specific Guest Tariff applicable to this room type, can be selected.

For example: 2 x 2 Bedroom Chalets.

First click on the first applicable room and press and hold the Control key on the keyboard. Then select the next room as well before releasing the Control key and clicking 'Accept'.



Novtel Hospitality

Would you like to pre-select the Guest Tariff?

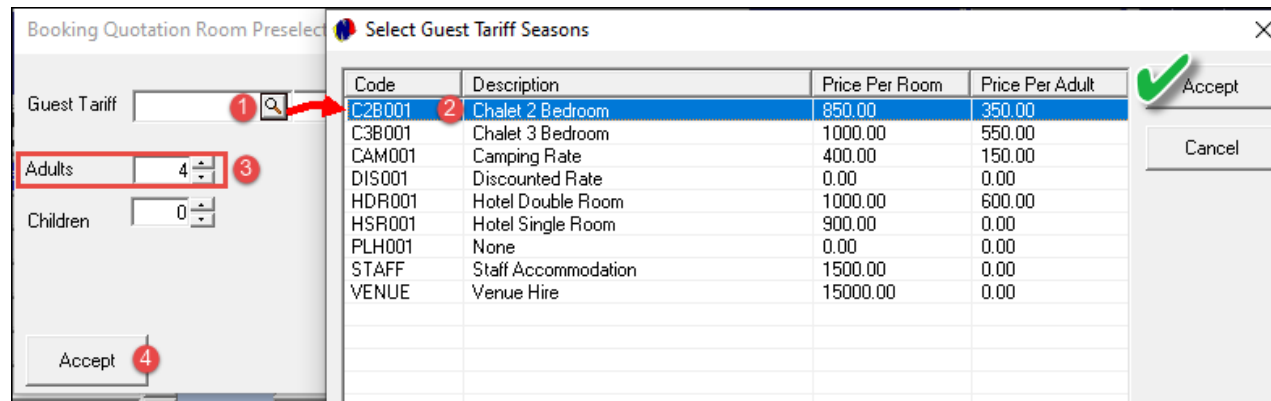
Yes No

Novtel will respond with *this* message, and by clicking 'Yes', the Guest Tariff applicable to this room type can be searched for and selected.

The default number of Adults and Children for all selected rooms is set before clicking 'Accept'.

IMPORTANT!

You will only be allowed to select up to the maximum number of people set to be accommodated on the Room Master Files. This number cannot be exceeded, and if attempted to do so, Novtel will communicate the following:



Booking Quotation Room Preselect

Guest Tariff: [Search Icon] [C2B001] [Chalet 2 Bedroom] [Clear]

Adults: 4 [Increment] [Decrement]

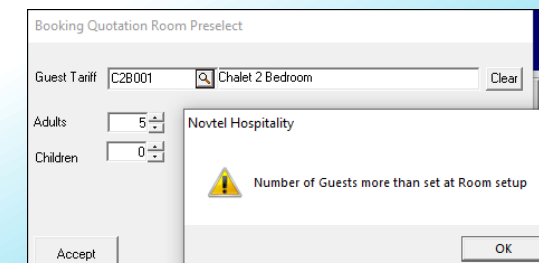
Children: 0 [Increment] [Decrement]

Accept

Select Guest Tariff Seasons

Code	Description	Price Per Room	Price Per Adult
C2B001	Chalet 2 Bedroom	850.00	350.00
C3B001	Chalet 3 Bedroom	1000.00	550.00
CAM001	Camping Rate	400.00	150.00
DIS001	Discounted Rate	0.00	0.00
HDR001	Hotel Double Room	1000.00	600.00
HSR001	Hotel Single Room	900.00	0.00
PLH001	None	0.00	0.00
STAFF	Staff Accommodation	1500.00	0.00
VENUE	Venue Hire	15000.00	0.00

Accept Cancel



Booking Quotation Room Preselect

Guest Tariff: [C2B001] [Chalet 2 Bedroom] [Clear]

Adults: 5 [Increment] [Decrement]

Children: 0 [Increment] [Decrement]

Novtel Hospitality

Number of Guests more than set at Room setup

Accept OK



Creating a Quotation in Novtel

Both the rooms are now listed here as selected by the User.

Quotation

Quotation **New Quotation** Copy Quotation Description: **SSS Conference June 2022** Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Room/Item	QL	DERQ	Guest	Guest Name / Item / Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
0 C001	0	RV	1	SSS00 Southern Shores Shipping	Q			2022/06/07	2022/06/10	3	C2B001	2	4	4	0	0	4200.00
1 BUF001	0	1	0	SSS00 Buffet Breakfast - Adults	Q			2022/06/07	2022/06/10	3	C2B001		4	0	0	0	0.00
2 BUF002	0	1	0	SSS00 Buffet Breakfast - Children	Q			2022/06/07	2022/06/10	3	C2B001		4	0	0	0	0.00
3 C002	0	RV	0	SSS00 Southern Shores Shipping	Q			2022/06/07	2022/06/10	3	C2B001	2	4	4	0	0	4200.00
4 BUF001	0	1	0	SSS00 Buffet Breakfast - Adults	Q			2022/06/07	2022/06/10	3	C2B001		4	0	0	0	0.00
5 BUF002	0	1	0	SSS00 Buffet Breakfast - Children	Q			2022/06/07	2022/06/10	3	C2B001		4	0	0	0	0.00
			0		Q			2022/05/04	2022/05/04	0			0	0	0	0	0.00
			0		Q			2022/05/04	2022/05/04	0			0	0	0	0	0.00
			0		Q			2022/05/04	2022/05/04	0			0	0	0	0	0.00
			0		Q			2022/05/04	2022/05/04	0			0	0	0	0	0.00
			0		Q			2022/05/04	2022/05/04	0			0	0	0	0	0.00

Accept | PP - Per Person | TR - Tariff to Reservation | CR - Charges to Reservation | << First | < Previous | Next > | Last >> | Quotation | Close

DC - Duration Charged | GT - Guest/Item Total | Available | Unavailable

DE - Department | RQ - Room Type Qty

1. The 'RQ' (Room Type Quantity) field is disabled as we have already selected the required number of rooms for this type of room.
2. Where applicable, the 'PP' checkbox is selected to enable Novtel to charge the rate per person opposed to the room rate.
3. The 'Date In' and 'Date Out' for all reservations are derived from the Start and End Date selected globally.
4. As we have selected the dates as 7 – 10 June 2022, the 'DC' column (Duration Charged) is indicated as 3, since the Guests will be charged for the nights of the 7th, 8th and 9th of June.
5. The selected Guest Tariff code is inserted here automatically as we have selected this Tariff to be linked to both, 2 Bedroom Chalets previously.
6. The 'Type' column for all selected rooms displays either the globally selected 'Reservation Type', or the reservation type linked to the Guest Tariff Master File.
7. The number of Adults are displayed here as set previously, and the accommodation package items linked to the Guest Tariff will also be displayed at the number set for the Adults and / or children.
8. In the 'Total Including' column per room, Novtel will calculate either the room rate or the rate per person according to the settings applied. In this case, it is R350.00 per person x 4, and for 3 nights – which equals R4200.00 per room line item.



Creating a Quotation in Novtel

Quotation

Quotation **New Quotation** Copy Quotation Description : **SSS Conference June 2022** Status : Quotation

Customer Code : SSS001 Southern Shores Shipping Company

Country : South Africa

Start Date : 2022/06/07 End Date : 2022/06/10

Order Number : SSS0822

Reservation Type : 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Add Room / Charge	Change Room	Select Guest	Room Type To Room	Room/Item	QL	DE	RQ	Guest	Guest Name / Item	
				11	BUF002	0	1	0	SSS00	Buffet Breakfast - Child
				12	S101	0	RV	0	SSS00	Southern Shores Shipp
				13	BUF001	0	1	0	SSS00	Buffet Breakfast - Adult
				14	S102	0	RV	0	SSS00	Southern Shores Shipp
				15	BUF001	0	1	0	SSS00	Buffet Breakfast - Adults
				16	VEN001	0	ER	0	SSS00	Southern Shores Shipping

Novtel Hospitality

Would you like to proceed with the processing?

Yes No

Type	GT	Adult	Child	Child 1 - 5	Total Incl
2	1	1	0	0	2700.00
2	1	1	0	0	2700.00
1	0	0	0	0	0.00
2	14	14	0	0	45000.00

Accept

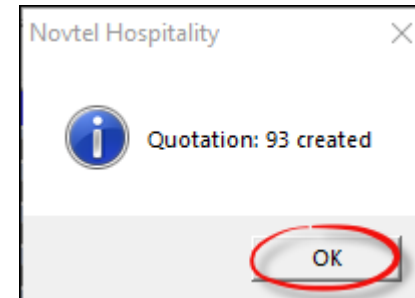
CR - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

All other rooms are selected in the same manner.

The Quotation is saved by clicking 'Accept', and 'Yes'.

A dedicated 'Quotation Number' is now allocated to this quotation.





Creating a Quotation in Novtel

Edit Charge

Code: BUF001
Description: Buffet Breakfast - Adults
Barcode: [Empty]

☒ Display On Invoice
☐ Service Charge Item
☐ Event Item

☒ Physical Item
☐ Use Custom Rate
☐ Master Price
☐ Blocked

General Properties Voucher Price Update Foreign Currency **Activity Tracker**

Location: LHREST Lighthouse Restaurant
Grouping: CATERING Catering
Activity Description: Full Buffet inclusive of coffee, tea or juice.

If a note was captured on the 'Activity Tracker' tab of the room or charge's master file, the note will be displayed in the 'Note' field by default and can be altered on the quotation if applicable.

The changes made to the note on the Quotation, will not affect the original note entered on the room or charge's master file.

Quotation 93 Copy Quotation Description :

Customer Code : SSS001 Southern Shores Shipping Company
Country : South Africa
Start Date : 2022/06/07 End Date : 2022/06/10
Order Number : SSS0822
Reservation Type : 2 Bed and Breakfast

Add Room / Charge Change Room Select Guest Room Type To Room

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR
0	C001	86	RV	0	SSS001	Southern Shores Shipping			2
1	BUF001	87	1	0	SSS001	Buffet Breakfast - Adults			2
2	BUF002	88	1	0	SSS001	Buffet Breakfast - Children			2

A custom note can also be entered manually per quotation line – where applicable.

Simply click on the magnifying glass next to the required line. The selected line will be highlighted and the 'Note' field will be activated where a custom note can be entered, pertaining to *this* line item.

Please note that you will be able to copy and paste information from a digital document to Novtel, and from one line item's note field to another.

Quotation 93 Copy Quotation Description : SSS

Note :
Breakfast is included in the Accommodation Rate.
Consists of various fruits, yogurts and cereals.
Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish.
Pastries and bread.
Juice, coffee and tea.

Location: LHREST Report Grouping: CATERING Time Start: 7:00 Time End: 8:00

Add Room / Charge Change Room Select Guest Room Type To Room

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date
0	CON010	25	1	0	SSS001	Conference Lunch Option				2022/06/0
1	C001	86	RV	0	SSS001	Southern Shores Shipping				2022/06/0
2	BUF001	87	1	0	SSS001	Buffet Breakfast - Adults				2022/06/0
3	BUF002	88	1	0	SSS001	Buffet Breakfast - Children				2022/06/0
4	C002	89	RV	0	SSS001	Southern Shores Shipping				2022/06/0

All other lines will be deactivated while the 'Note' field is open.



Creating a Quotation in Novtel

Quotation

Quotation Copy Quotation Description : SSS Conference June 2022 Status : Quotation

Note :
Breakfast is included in the Accommodation Rate.
Consists of various fruits, yogurts and cereals.
Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish.
Pastries and bread.
Juice, coffee and tea.

Select All
Select None
0
Move Booking/s
Remove Line/s

Location	Report Grouping	Time Start	Time End
LHREST	CATERING	7:00	8:00

Close

Locations and Report Grouping options will either be automatically displayed per line item on the 'Note' field of the quotation if linked to a Room or Charge, or it can be manually searched for and selected.

Quotation

Quotation Copy Quotation Description : SSS Conference June 2022 Status : Quotation

Note :
Breakfast is included in the Accommodation Rate.
Consists of various fruits, yogurts and cereals.
Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish.
Pastries and bread.
Juice, coffee and tea.

Select Location

Code	Description
AMPHI	Amphi Theatre
CAMPING	Camping Area
CHALET	Chalet Area
CONFER1	Conference Room 1
CONFER2	Conference Room 2
CONFER3	Conference Room 3
CONFER4	Conference Room 4
DORM	Dorm Rooms
EXHIBITION	Exhibition Centre
HOTEL	Hotel
LHREST	Lighthouse Restaurant
PICNIC	Picnic Area
RIVER	River - White Water Rafting
WED	Wedding Venue
WOODS	Woods - Zip Line

Accept
Cancel

Room/Item	QL	DE	RO	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Ad	
0	CON010	25	1	0	SSS00	Conference Lunch Option					2022/06/07	2022/06/10	4			14	0
1	C001	86	RV	0	SSS00	Southern Shores Shipping					2022/06/07	2022/06/10	3	C2B001	2	4	4
2	BUF001	87	1	0	SSS00	Buffet Breakfast - Adults					2022/06/07	2022/06/10	3	C2B001	0	0	0
3	BUF002	88	1	0	SSS00	Buffet Breakfast - Children					2022/06/07	2022/06/10	3	C2B001	0	0	0
4	C002	89	RV	0	SSS00	Southern Shores Shipping					2022/06/07	2022/06/10	3	C2B001	2	4	4
5	BUF001	90	1	0	SSS00	Buffet Breakfast - Adults					2022/06/07	2022/06/10	3	C2B001	4	0	0
6	BUF002	91	1	0	SSS00	Buffet Breakfast - Children					2022/06/07	2022/06/10	3	C2B001	0	0	0
7	D201	92	RV	0	SSS00	Southern Shores Shipping					2022/06/07	2022/06/10	3	HDR001	2	2	2
8	BUF001	93	1	0	SSS00	Buffet Breakfast - Adults					2022/06/07	2022/06/10	3	HDR001	2	0	0
9	BUF002	94	1	0	SSS00	Buffet Breakfast - Children					2022/06/07	2022/06/10	3	HDR001	0	0	0
10	D202	95	RV	0	SSS00	Southern Shores Shipping					2022/06/07	2022/06/10	3	HDR001	2	2	2

Accept
PP - Per Person
DC - Duration Charged
DE - Department
TR - Tariff to Reservation
GT - Guest/Item Total
IR - Room Type Qty
CR - Charges to Reservation
Available
Unavailable
<< First
< Previous
Next >
>>

Quotation

Quotation Copy Quotation Description : SSS Conference June 2022 Status : Quotation

Note :
Breakfast is included in the Accommodation Rate.
Consists of various fruits, yogurts and cereals.
Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish.
Pastries and bread.
Juice, coffee and tea.

Select Activity Grouping

Code	Description
ACCOM	Accommodation
ACTIVITY	Activity
BILLING	Billing Action
CATERING	Catering
CONFEREN...	Conference
EQUIPMENT	Equipment
SETUP	Room Setup
TAUSTINGS	Wine Tasting
TOUR	Ticketed Events

Accept
Cancel

Room/Item	QL	DE	RO	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Ad	
0	CON010	25	1	0	SSS00	Conference Lunch Option					2022/06/07	2022/06/10	4			14	0



Creating a Quotation in Novtel

Action times can be inserted for the items to be displayed in the correct order on the quotation document.

In this case, the Buffet Breakfast is served in the Lighthouse Restaurant, and from 7:00 – 8:00am daily and for the duration of the reservation quotation.

Quotation

Quotation **93** Description : **SSS Conference June 2022** Status : **Quotation**

Note :
 Breakfast is included in the Accommodation Rate.
 Consists of various fruits, yogurts and cereals.
 Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish.
 Pastries and bread.
 Juice, coffee and tea.

Location **Report Grouping** **Time Start** **Time End**
 LHREST 7:00 8:00

Room/Item	QL	DE	RQ	Guest	Guest Name / Item Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	*	
0 CON010	25	1	0	SSS00	Conference Lunch Option				2022/06/07	2022/06/10	4			14	0	0	0	0	2800.00	
1 C001	86	RV	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	C2B001	2	4	4	0	0	0	4200.00	
2 BUF001	87	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	C2B001		4	0	0	0	0	0.00	
3 BUF002	88	1	0	SSS00	Buffet Breakfast - Children				2022/06/07	2022/06/10	3	C2B001		0	0	0	0	0	0.00	
4 C002	89	RV	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	C2B001	2	4	4	0	0	0	4200.00	
5 BUF001	90	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	C2B001		4	0	0	0	0	0.00	

Please note that when closing the 'Note' field, the settings are saved. Hovering on the 'Note' search option for the line edited and closed, this 'tool-tip' will indicate the Location, Grouping option and start time.



Creating a Quotation in Novtel

On Quotation Layout 3, the location, report grouping, and action time will be displayed for the specific charge and day.

Report Grouping	←	Catering						
Location	←	Start	End	No's	Description	Unit Price	Tax	Incl Amount
Action Times	←	07:00	08:00	4	Buffet Breakfast - Adults	R0.00	R0.00	R0.00#
The note captured for this line item, is also displayed directly below the charge.	←				Breakfast is included in the Accommodation Rate. Consists of various fruits, yogurts and cereals. Eggs, bacon, sausages, mushrooms, hashbrowns, baked beans and tomato relish. Pastries and bread. Juice, coffee and tea.			



Creating a Quotation in Novtel

Any relevant charges – not included in the accommodation package - can be added to the quotation.

Such charges may include the following:

- ✓ A Projector
- ✓ Stationary
- ✓ Specific Refreshments
- ✓ Lunch or Dinner
- ✓ Events such as a Zip Line activity; Exhibition; Wine tasting, etc.

Please note that charges classified as 'Menu' or 'Bar' items, which are sold from the Restaurant POS system, can be added to the quotation, but can be removed when the quotation is converted into a reservation.

- ✓ If removed, the quoted for menu and bar items will have to be charged directly from the restaurant to the 'In-House' reservation.
- ✓ If not removed, the menu and bar items will be added to the reservation's additional costs and **MUST NOT** be charged from the restaurant again.

As a rule, the price for all charges are FIXED, and therefore it **cannot be changed** on the quotation.

The 'Total Including' field for such charges is disabled.

However: If set up by the System Administrator, certain charges can be classified as a 'Custom Rate' charge, and therefore the total can be amended.

Please consult your System Administrator in this regard.



Creating a Quotation in Novtel

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Add Room / Charge Change Room Select Guest Room Type To Room

Room/Item QL D Guest Guest Name / Item I

0 C001 086 RV 0 SSS001 Southern Shores Shipping

1 BUF001 087 1 0 SSS001 Buffet Breakfast - Adults

2 BUF002 088 1 0 SSS001 Buffet Breakfast - Children

3 C002 089 RV 0 SSS001 Southern Shores Shipping

4 BUF001 090 1 0 SSS001 Buffet Breakfast - Adults

5 BUF002 091 1 0 SSS001 Buffet Breakfast - Children

6 D001 092 RV 0 SSS001 Southern Shores Shipping

7 BUF001 093 1 0 SSS001 Buffet Breakfast - Adults

8 BUF002 094 1 0 SSS001 Buffet Breakfast - Children

9 D002 095 RV 0 SSS001 Southern Shores Shipping

10 BUF001 096 1 0 SSS001 Buffet Breakfast - Adults

SELECT ROOM

SELECT ROOM TYPE

SELECT CHARGE

SELECT ACTIVITY CODE

Accept

FP - Per Person TR - Tariff to Reservation CR - Charges to Reservation

DC - Duration Charged GT - Guest/Item Total Available Unavailable

DE - Department RQ - Room Type Qty

Clicking on the 'Add Room / Charge' button, the 'Select Charge' option is selected to add the necessary charges to the quotation as requested.

Select Charge

Code	Description	Excl	Tax	Incl	Department
ADD001	Fries - Half Portion	13.04	1.96	15.00	Lighthouse Restaurant
BAC001	Bacon	13.04	1.96	15.00	Lighthouse Restaurant
BAR002	Bar One Chocolate Bar	6.96	1.04	8.00	
BD001	Bad Debt Charge	0.00	0.00	0.00	
BEER01	Windhoek Light 375ml	21.74	3.26	25.00	
BEER02	Windhoek Lager 375ml	21.74	3.26	25.00	
BEER03	Castle Light 375ml	21.74	3.26	25.00	Lighthouse Restaurant
BEER04	Castle Lager 375ml	21.74	3.26	25.00	
BRE001	Sunrise Breakfast	34.78	5.22	40.00	Lighthouse Restaurant
BRE002	Farmers Breakfast	60.00	9.00	69.00	Lighthouse Restaurant
BRE003	Bankers Breakfast	77.39	11.61	89.00	Lighthouse Restaurant
BRE004	Plain Omelette and Toast	43.48	6.52	50.00	Lighthouse Restaurant
BRE005	Breakages	0.00	0.00	0.00	
BRE010	Breakfast Included	0.00	0.00	0.00	
BUF001	Buffet Breakfast - Adults	130.43	19.57	150.00	Lighthouse Restaurant
BUF002	Buffet Breakfast - Children up to 15	69.57	10.43	80.00	Lighthouse Restaurant
BUR001	Cheese Burger and Chips	73.91	11.09	85.00	
BUR002	Pepper Burger and Chips	73.91	11.09	85.00	
BUR003	Hamburger and Chips	68.70	10.30	79.00	Lighthouse Restaurant
BW0001	Boerewors	17.39	2.61	20.00	
CAS001	Cash Deposit Fee	0.00	0.00	0.00	
CFC001	Chocolate Cake and Filter Coffee	60.00	0.00	60.00	Lighthouse Restaurant
CHA001	Champagne 750ml	82.61	12.39	95.00	
CLE001	Cleaning Fees	86.96	13.04	100.00	
CNU001	Caramelized Nuts per 100g	34.78	5.22	40.00	

Search By: Code

Search For:

Tariff to Reservation CR - Charges to Reservation

Guest/Item Total Available Unavailable

Room Type Qty

Accept

Cancel

<< First < Previous Next > Last >> Quotation Close

The applicable charge can be searched for by means of the following search criteria, and when matched by Novtel, the charge must be selected:

- ✓ Code
- ✓ Description
- ✓ Excluding VAT amount
- ✓ Tax Amount
- ✓ Including VAT amount
- ✓ Department



Creating a Quotation in Novtel

The selected charge is now added to the quotation, and for the duration of the first day only.

Quotation

Quotation: **93** Copy Quotation Description: **SSS Conference June 2022** Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Room/Item	QL	DE	RQ	Guest	Guest Name / Item Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	*
11	BUF002	97	1	0	SSS00	Buffet Breakfast - Children			2022/06/07	2022/06/10	3	HDR001		0	0	0	0	0.00	
12	S101	98	RV	0	SSS00	Southern Shores Shipping			2022/06/07	2022/06/10	3	HSR001	2	1	1	0	0	2700.00	
13	BUF001	99	1	0	SSS00	Buffet Breakfast - Adults			2022/06/07	2022/06/10	3	HSR001		1	0	0	0	0.00	
14	S102	00	RV	0	SSS00	Southern Shores Shipping			2022/06/07	2022/06/10	3	HSR001	2	1	1	0	0	2700.00	
15	BUF001	01	1	0	SSS00	Buffet Breakfast - Adults			2022/06/07	2022/06/10	3	HSR001		1	0	0	0	0.00	
16	VEN001	02	ER	0	SSS00	Southern Shores Shipping			2022/06/07	2022/06/10	3	VENUE	2	14	14	0	0	45000.00	
17	PR001	0	ER	0	SSS00	Projector			2022/06/07	2022/06/07	1			1	0	0	0	1500.00	
									2022/05/10	2022/05/10	0			0	0	0	0	0.00	
									2022/05/10	2022/05/10	0			0	0	0	0	0.00	
									2022/05/10	2022/05/10	0			0	0	0	0	0.00	
									2022/05/10	2022/05/10	0			0	0	0	0	0.00	

Accept PP - Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Debit Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

The rate connected to the charge is inserted and cannot be changed from the 'Quotation' screen.

The department code the charge is linked to, is displayed here.



Creating a Quotation in Novtel

Quotation

Quotation **93** Copy Quotation Description : **SSS Conference June 2022** Status : Quotation

Note :

Select All
Select None
0
Move Booking/s
Remove Line/s

Location Report Grouping Time Start Time End
CONFER1 EQUIPMENT 8:00 18:00

Close

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
11	BUF002	97	1	0	SSS00	Buffet Breakfast - Children				2022/06/07	2022/06/10	3	HDR001		0	0	0	0	0.00
12	S101	98	RV	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	HSR001	2	1	0	0	0	2700.00
13	BUF001	99	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	HSR001		1	0	0	0	0.00
14	S102	00	RV	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	HSR001	2	1	0	0	0	2700.00
15	BUF001	01	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	HSR001		1	0	0	0	0.00
16	VEN001	02	ER	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	VENUE	2	14	0	0	0	45000.00
17	PR001	0	ER	0	SSS00	Projector				2022/06/07	2022/06/09				0	0	0	0	4500.00
				0						2022/05/10	2022/05/10	0			0	0	0	0	0.00
				0						2022/05/10	2022/05/10	0			0	0	0	0	0.00
				0						2022/05/10	2022/05/10	0			0	0	0	0	0.00
				0						2022/05/10	2022/05/10	0			0	0	0	0	0.00

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

By clicking on the search option in the 'Note' column next to the item, the line is highlighted and the 'Note' field is activated.

A custom note can be entered to be displayed on the Quotation, and ultimately, on the Activity Tracker too.

Select the applicable 'Location', 'Report Grouping' option and action times before clicking 'Close' to save the changes made to the 'Note' field.

Conference					
Start	End	No's	Description	Unit Price	Incl Amount
Conference Room 1					
00:00	00:00	14	Conference Room 1	R11 250.00	R11 381.58
					R11 250.00
Equipment					
Start	End	No's	Description	Unit Price	Incl Amount
Conference Room 1					
08:00	17:00	3	Projector	R1 500.00	R195.65
					R1 500.00
Total For: 8 June 2022				R2 447.57	R19 750.00
(* Non-financial transactions. Not included in Grand Total)					
(# Included in Accommodation/Event Package)					

On quotation layout 3, the selected charge will be displayed for each day set.

The 'Report Grouping' option is displayed in green, with the underlined 'Location' below it.

The action times are also displayed as selected.



Creating a Quotation in Novtel

Menu and / or Bar Charges can be added to the quotation in order to correctly quote for meals, beverages and other refreshments.

As per our example, we have added the following Menu Charges for the 7th of June already, and changed the quantity to 14 – as 14 Guests must be catered for:

Add Room / Charge		Change Room		Select Guest	Room Type To Room				Add Country *	Clear Tariff *	Select Tariff *	Select Type *			Select Child Rate 1-5 *	Clear Select *			
Room/Item	QL	DE	RQ	Guest	Guest Name / Item Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	*
0	PRD001	26	ER	0	SSS00	Projector	Q		2022/06/07	2022/06/09	3			3	0	0	0	4500.00	
1	EXC001	27	ER	0	SSS00	Extension Cord - 10m	Q		2022/06/07	2022/06/09	3			3	0	0	0	60.00	
2	MUL001	28	ER	0	SSS00	Multi Plug	Q		2022/06/07	2022/06/09	3			3	0	0	0	60.00	
3	CRE001	29	1	0	SSS00	Refreshments Day 1 - Ses	Q		2022/06/07	2022/06/07	1			14	0	0	0	770.00	
4	CON010	30	1	0	SSS00	Conference Lunch Option	Q		2022/06/07	2022/06/07	1			14	0	0	0	3500.00	
5	CON013	37	1	0	SSS00	Conference Dinner - Option	Q		2022/06/07	2022/06/07	1			14	0	0	0	3500.00	

7 June 2022

Catering				Unit Price	Tax	Incl Amount
Start	End	No's	Description			
Lighthouse Restaurant						
11:00	11:45	14	Refreshments Day 1 - Session 1	R55.00	R100.43	R770.00
Coffee and / or tea						
Variety of Muffins						
13:00	14:00	14	Conference Lunch Option 1	R250.00	R456.52	R3 500.00
ONE Coffee, tea OR Soft drink Included per person						
Salad Bar available - Variety of salads						
Starter						
Vegetable Soup and freshly Baked Bread						
Main						
Buffet - Roast Beef, pork belly and chicken pie						
Sweet potato, grilled mixed veg, green beans, rice.						
Desert						
Chocolate Mouse peppermint crisp tart fresh mixed fruit						
20:00	21:00	14	Conference Dinner - Option 1	R250.00	R456.52	R3 500.00



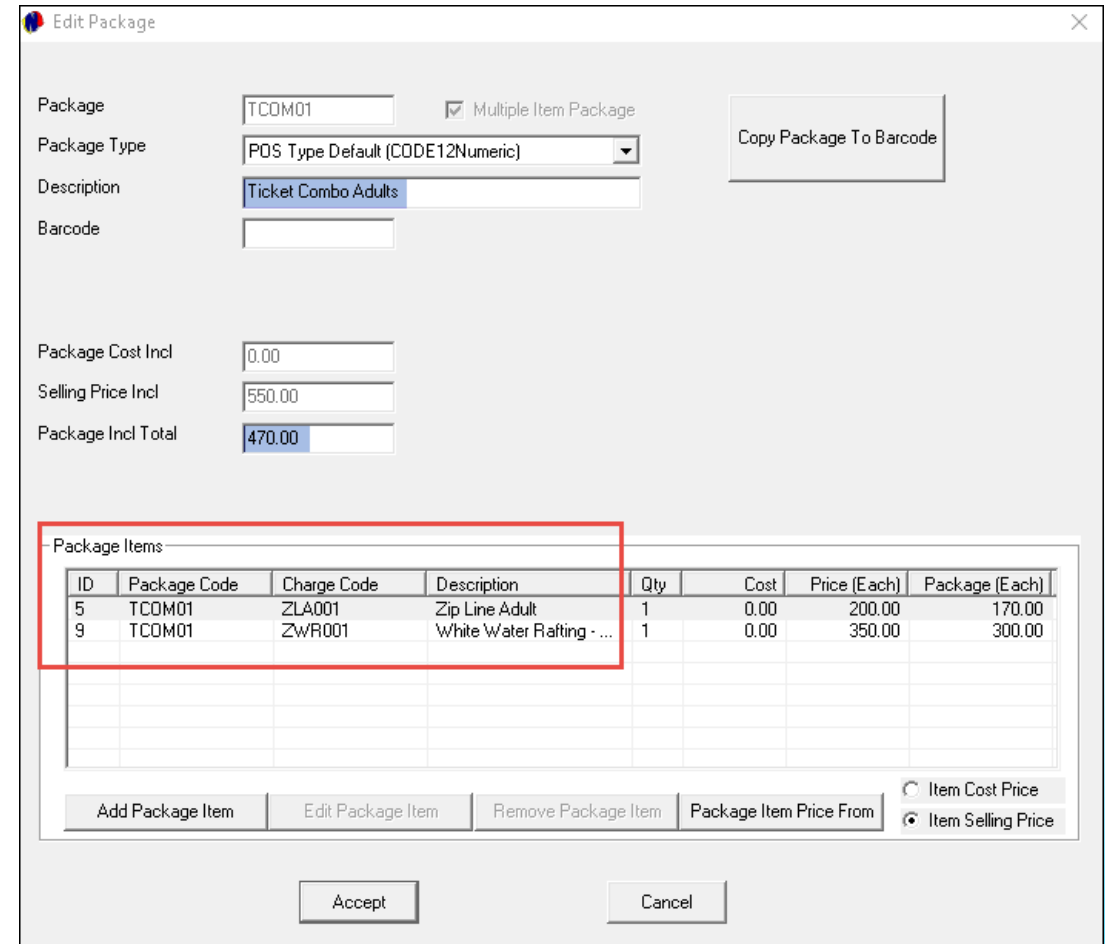
Creating a Quotation in Novtel

Novtel also incorporates an Event system where either reservations can be made for a free event, but only a limited number of people can attend, or, event tickets can be quoted for.

Event charges can either be selected as a single event and a ticket will ultimately be produced by the responsible department for this event only.

Or, 2 or more charges could have been combined in a POS Package at a discounted price, and a ticket for each event will be produced separately.

For demonstration purposes, we have created a POS Package for the Zip line and White-Water Rafting activities at a package price of R470.00 per adult. The normal selling price is R550.00 if the tickets are bought individually.



Package: TCOM01 ☒ Multiple Item Package

Package Type: POS Type Default (CODE12Numeric)

Description: Ticket Combo Adults

Barcode:

Package Cost Incl: 0.00

Selling Price Incl: 550.00

Package Incl Total: 470.00

Copy Package To Barcode

Package Items:

ID	Package Code	Charge Code	Description	Qty	Cost	Price (Each)	Package (Each)
5	TCOM01	ZLA001	Zip Line Adult	1	0.00	200.00	170.00
9	TCOM01	ZWR001	White Water Rafting - ...	1	0.00	350.00	300.00

Add Package Item Edit Package Item Remove Package Item Package Item Price From

☐ Item Cost Price ☒ Item Selling Price

Accept Cancel



Creating a Quotation in Novtel

Depending on whether or not the 'Create Events As Add Cost' option is selected when the quotation is converted into a reservation, the following will be true:

The screenshot shows the 'Quotation' form in Novtel. The form has a dark blue header with the title 'Quotation'. Below the header, there are several fields and checkboxes. The 'Quotation' number is 93, and the 'Description' is 'SSS Conference June 2022'. The 'Status' is 'Quotation'. The 'Customer Code' is SSS001, and the 'Country' is South Africa. The 'Start Date' is 2022/06/07 and the 'End Date' is 2022/06/10. The 'Order Number' is SSS0822. The 'Reservation Type' is 2, and the 'Bed and Breakfast' is selected. The 'Apply Service Charge' checkbox is checked. The 'Create Events As Add Cost' checkbox is checked and highlighted with a red box. The 'Consolidate Acc Packages' checkbox is checked. On the right side of the form, there are buttons for 'Select All', 'Select None', '0', 'Move Booking/s', and 'Remove Line/s'.

'Create Events As Add Cost' - Ticked:

The charges classified as 'Event' items, will be added to the reservation's Additional Costs' tab. This will enable the Grid User to manage the Events from the Group Reservation and print the tickets at the Front Desk.

'Create Events As Add Cost' - Unticked:

When the quotation is converted into a reservation, the following steps will be taken to manage the Event reservation and issuing tickets:

1. The Event Reservation will be created by an Event Manager in the dedicated Events system.
2. And the Event Tickets will be printed from the Retail POS system accessed from the Restaurant POS system. The outstanding total can also be settled from the Restaurant POS system / Ticket Office.

Creating a Quotation in Novtel

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Room/Item	QL	DE	Guest	Guest Name / Item	Type	GT	Adult	Child	Child 1 - 5	Total Incl
PR0001	26	ER	0	SSS001	Projector	3	0	0	0	4500.00
EXC001	27	ER	0	SSS001	Extension Cord - 10m	3	0	0	0	60.00
MUL001	28	ER	0	SSS001	Multi Plug	3	0	0	0	60.00
CRE001	29	1	0	SSS001	Refreshments Day 1 - Sel	14	0	0	0	770.00
CON010	30	1	0	SSS001	Conference Lunch Option	14	0	0	0	3500.00
CON013	37	1	0	SSS001	Conference Dinner - Opti	14	0	0	0	3500.00
CRE004	39	1	0	SSS001	Refreshments Day 2 - Sel	14	0	0	0	770.00
CON011	40	1	0	SSS001	Conference Lunch Option	14	0	0	0	3500.00
CON014	41	1	0	SSS001	Confere					
CRE006	42	1	0	SSS001	Refresh					
CON012	43	1	0	SSS001	Confere					

SELECT ROOM
SELECT ROOM TYPE
SELECT CHARGE
SELECT ACTIVITY CODE

Accept PP - Per Person TR
DC - Duration Charged GT
DE - Department RQ

For demonstration purposes, we will now add the POS Package with our 2 Event charges linked to it.

First click on the 'Add Room / Charge' button, and click on 'Select Charge'.

Select Charge

Code	Description	Excl	Tax	Incl	Department
SUN001	Sunscreen Cream 50ml	65.22	9.78	75.00	
SUN002	Sunscreen Spray 50ml	86.09	12.91	99.00	
SW001	Sparkling Water	13.04	1.96	15.00	
SWD001	Sparkling Water Deli	0.00	0.00	0.00	
SWR001	Sparkling Water - Restaurant	0.00	0.00	0.00	
TAW001	Toasted Chicken and Mayo with C...	43.48	6.52	50.00	
TCOM01	Ticket Combo Adults	470.00	0.00	470.00	
TCOM02	Ticket Combo Children	300.00	0.00	300.00	
TCOM03	School Group Package	245.00	0.00	245.00	
TEA001	Earl Grey Tea	13.04	1.96	15.00	
TEA002	5 Roses Tea	13.04	1.96	15.00	
TEA003	Rooibos Tea	13.04	1.96	15.00	
TEST001	Test Charge	0.00	0.00	0.00	
TEST01	Test Charge 2	0.00	0.00	0.00	
TEST101	Custom Rate Demonstration Charge	0.00	0.00	0.00	
TESTADD	Add on op ete	0.00	0.00	0.00	
TEX001	Tex Chocolate Bar	6.09	0.91	7.00	
TML001	Tourism Levy	0.00	0.00	0.00	
TOA001	Toasted Chicken Mayo and Chips	39.13	5.87	45.00	
TOA002	Toasted Cheese and Tomato and ...	34.78	5.22	40.00	
TOA003	Toasted Bacon and Egg and Chips	42.61	6.39	49.00	
TOW001	Extra Towel Charge	8.70	1.30	10.00	
TRF001	Ticket Refund	0.00	0.00	0.00	
TSH001	T-Shirt with Logo Size Small	104.35	15.65	120.00	Curio Shop
TSH002	T-Shirt with Logo Size Medium	113.04	16.96	130.00	

Search By Code Search For TCOM01

Accept Cancel

The Package Code for our combined events was created as 'TCOM01'. We will now use the 'Code' search option, and then insert this code in the 'Search For' field.

The matched charge is highlighted and can now be selected.



Creating a Quotation in Novtel

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
22	BUF001	96	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	HDR001		2	0	0	0	0.00
23	BUF002	97	1	0	SSS00	Buffet Breakfast - Children				2022/06/07	2022/06/10	3	HDR001		0	0	0	0.00	
24	S101	98	RV	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	HSR001	2	1	1	0	2700.00	
25	BUF001	99	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	HSR001		1	0	0	0.00	
26	S102	00	RV	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	HSR001	2	1	1	0	2700.00	
27	BUF001	01	1	0	SSS00	Buffet Breakfast - Adults				2022/06/07	2022/06/10	3	HSR001		1	0	0	0.00	
28	VEN001	02	ER	0	SSS00	Southern Shores Shipping				2022/06/07	2022/06/10	3	VENUE	2	14	14	0	45000.00	
29	ZLA001	0	W	0	SSS00	Zip Line Adult				2022/06/07	2022/06/07	1			1	0	0	170.00	
30	ZWR001	0	FR	0	SSS00	White Water Rafting - Adu				2022/06/07	2022/06/07	1			1	0	0	300.00	
				0						2022/05/10	2022/05/10	0			0	0	0	0.00	
				0						2022/05/10	2022/05/10	0			0	0	0	0.00	

Accept: PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation DC - Duration Charged GT - Guest/Item Total DE - Department

Available Unavailable

<< First < Previous Next > Last >> Quotation Close

The 2 events are loaded at the same time, but in separate lines. The purpose is to manage each event's date and time slot individually, and to ultimately produce 2 tickets for entry at the various locations.

Also note that the discounted price per ticket is inserted here, and at a quantity of 1 each.

The applicable dates for the activities can now be set. It can either happen on the same date, or different dates.

The correct quantity to be quoted for is set, and the 'Note' fields for the individual charges accessed to apply all other settings too.

29	ZLA001	0	W	0	SSS00	Zip Line Adult				2022/06/10	2022/06/10	1				14	0	0	0	0	0	0	2380.00
30	ZWR001	0	FR	0	SSS00	White Water Rafting - Adu				2022/06/10	2022/06/10	1				14	0	0	0	0	0	0	4200.00

10 June 2022						
Activity						
Start	End	No's	Description	Unit Price	Tax	Incl Amount
River - White Water Rafting						
11:00	13:00	14	White Water Rafting - Adults	R300.00	R547.83	R4 200.00
Woods - Zip Line						
08:00	10:00	14	Zip Line Adult	R170.00	R310.43	R2 380.00

On Quotation Layout 3, the report grouping, location and times will be displayed for the set date.



Creating a Quotation in Novtel

Discount can be allocated to a Quotation in the form of a charge entered as a **negative amount** and is inserted as a single line item on the quotation.

The charge must have been set up by your System Administrator for you to utilize this option, and to make the charge available for selection.

In our system, the charge code is 'AAA001', and the description is 'Approved Discount'.

For demonstration purposes, we will now continue with Quotation 93, and the original quoted for amount is R108 958.63.

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Add Room / Charge	Change Room	Select Guest	Room Type To Room	Add Country	Clear Tariff	Select Tariff	Select Type	Select Child Rate 1-5	Clear Select										
Room/Item	QL	DE	RQ	Guest	Guest Name / Item / Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	*
0	PRD001	26	ER	0	SSS001	Projector			2022/06/07	2022/06/09	3			3	0	0	0	4500.00	
1	EXC001	27	ER	0	SSS001	Extension Cord - 10m			2022/06/07	2022/06/09	3			3	0	0	0	60.00	
2	MUL001	28	ER	0	SSS001	Multi Plug			2022/06/07	2022/06/09	3			3	0	0	0	60.00	
3	CRE001	29	1	0	SSS001	Refreshments Day 1 - Sess			2022/06/07	2022/06/07	1			14	0	0	0	770.00	
4	CON010	30	1	0	SSS001	Conference Lunch Option			2022/06/07	2022/06/07	1			14	0	0	0	3500.00	
5	CON013	37	1	0	SSS001	Conference Dinner - Option			2022/06/07	2022/06/07	1			14	0	0	0	3500.00	
6	CRE004	39	1	0	SSS001	Refreshments Day 2 - Sess			2022/06/08	2022/06/08	1			14	0	0	0	770.00	
7	CON011	40	1	0	SSS001	Conference Lunch Option			2022/06/08	2022/06/08	1			14	0	0	0	3500.00	
8	CON014	41	1	0	SSS001	Conference Dinner Option			2022/06/08	2022/06/08	1			14	0	0	0	3500.00	
9	CRE006	42	1	0	SSS001	Refreshments Day 3 - Sess			2022/06/09	2022/06/09	1			14	0	0	0	770.00	
10	CON012	43	1	0	SSS001	Conference Lunch Option			2022/06/09	2022/06/09	1			14	0	0	0	3500.00	

Accept

PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation

DC - Duration Charged GT - Guest/Item Total Available Unavailable

DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

Tax Total :	R 13 665.13
Excl Total :	R 95 293.50
Incl Total :	R 108 958.63



Creating a Quotation in Novtel

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Room/Item	QL	De	Guest	Guest Name / Item I	Type	GT	Adult	Child	Child 1 - 5	Total Incl
PR0001	26	ER	0	SSS001	Projector	3	0	0	0	4500.00
EXC001	27	ER	0	SSS001	Extension Cord - 10m	3	0	0	0	60.00
MUL001	28	ER	0	SSS001	Multi Plug	3	0	0	0	60.00
CRE001	29	1	0	SSS001	Refreshments Day 1 - Se	14	0	0	0	770.00
CON010	30	1	0	SSS001	Conference Lunch Option	14	0	0	0	3500.00
CON013	37	1	0	SSS001	Conference Dinner - Opti	14	0	0	0	3500.00
CRE004	39	1	0	SSS001	Refreshments Day 2 - Se	14	0	0	0	770.00
CON011	40	1	0	SSS001	Conference Lunch Option	14	0	0	0	3500.00
CON014	41	1	0	SSS001	Conference Dinner Option	14	0	0	0	3500.00
CRE006	42	1	0	SSS001	Refreshments Day 3 - Se	14	0	0	0	770.00
CON012	43	1	0	SSS001	Conference Lunch Option	14	0	0	0	3500.00

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

The Discount charge is added to the quotation in the exact same manner than other charges, namely:

Click on the 'Add Room / Charge' button and click on 'Select Charge'.

In this case, we will use the 'Code' search option, and search for charge code 'AAA001' – then select it to be added to the quotation.

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Select Charge

Code	Description	Excl	Tax	Incl	Department
001	Rare	0.00	0.00	0.00	Lighthouse Restaurant
002	Medium	0.00	0.00	0.00	Lighthouse Restaurant
003	Medium Rare	0.00	0.00	0.00	Lighthouse Restaurant
004	Medium - Well Done	0.00	0.00	0.00	Lighthouse Restaurant
006	Well Done	0.00	0.00	0.00	Lighthouse Restaurant
007	Scrambled	0.00	0.00	0.00	Lighthouse Restaurant
008	Fried - Medium	0.00	0.00	0.00	Lighthouse Restaurant
009	Fried - Soft	0.00	0.00	0.00	Lighthouse Restaurant
010	Sunny Side Up	0.00	0.00	0.00	Lighthouse Restaurant
011	Boiled	0.00	0.00	0.00	Lighthouse Restaurant
012	Poached	0.00	0.00	0.00	Lighthouse Restaurant
AAA001	Approved Discount	0.00	0.00	0.00	Conferencing
ACT001	Mini Golf	17.39	2.61	20.00	
ACT003	Full Facial	0.00	0.00	0.00	
ADD001	Fries - Half Portion	13.04	1.96	15.00	Lighthouse Restaurant
BAC001	Bacon	13.04	1.96	15.00	
BAR002	Bar One Chocolate Bar	6.96	1.04	8.00	
BD001	Bad Debt Charge	0.00	0.00	0.00	
BEER01	Windhoek Light 375ml	21.74	3.26	25.00	
BEER02	Windhoek Lager 375ml	21.74	3.26	25.00	
BEER03	Castle Light 375ml	21.74	3.26	25.00	Lighthouse Restaurant
BEER04	Castle Lager 375ml	21.74	3.26	25.00	
BRE001	Sunrise Breakfast	34.78	5.22	40.00	Lighthouse Restaurant
BRE002	Farmers Breakfast	60.00	9.00	69.00	Lighthouse Restaurant

Search By: Code Search For: AAA001

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty



Creating a Quotation in Novtel

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Room/Item	QL	DE	RQ	Guest	Guest Name / Item Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
33	AAA001	0	ER	0	SSS001 Approved Discount				2022/06/07	2022/06/07	1			1	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00

The charge is now inserted at a zero amount.

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/06/07 End Date: 2022/06/10

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Room/Item	QL	DE	RQ	Guest	Guest Name / Item Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
33	AAA001	0	ER	0	SSS001 Approved Discount				2022/06/07	2022/06/07	1			1	0	0	0	-5000.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00
				0					2022/05/11	2022/05/11	0			0	0	0	0	0.00

Very Important:

A custom amount can be added here, but to allocate discount, you **MUST** insert it as a negative amount.

Simply add the minus sign and enter the amount to be discounted. In this case, -5000.00



Creating a Quotation in Novtel

QUOTATION

Oasis Lodge
Southern Shores Shipping Company
PO Box 748474
Cape Town
1111

VAT No : 111222333444

Date : 2022/05/11
Start Date : 2022/06/07
End Date : 2022/06/10
Quote # : 93

Oasis Lodge
77 Long Beach Road
Long Beach
Mossel Bay
6500
South Africa

Tel : 044 123456789
Fax : 044 123456789
Email : oasis@restaurant.com
VAT No : 123456789

7 June 2022						
Start	End	No's	Description	Unit Price	Tax	Incl Amount
00:00	00:00	1	Approved Discount	R0.00	-R652.17	-R5 000.00
Accommodation						
Start	End	No's	Description	Unit Price	Tax	Incl Amount
Chalet Area						
00:00	00:00	4	Chalet 1 - 2 Bedroom Room	R1 400.00	R182.61	R1 400.00
00:00	00:00	4	Chalet 2 - 2 Bedroom	R1 400.00	R182.61	R1 400.00

The charge will be displayed on the quote document, and the total quoted amount has been reduced accordingly.

Tax Total :	R 13 012.95
Excl Total :	R 90 945.68
Incl Total :	R 103 958.63

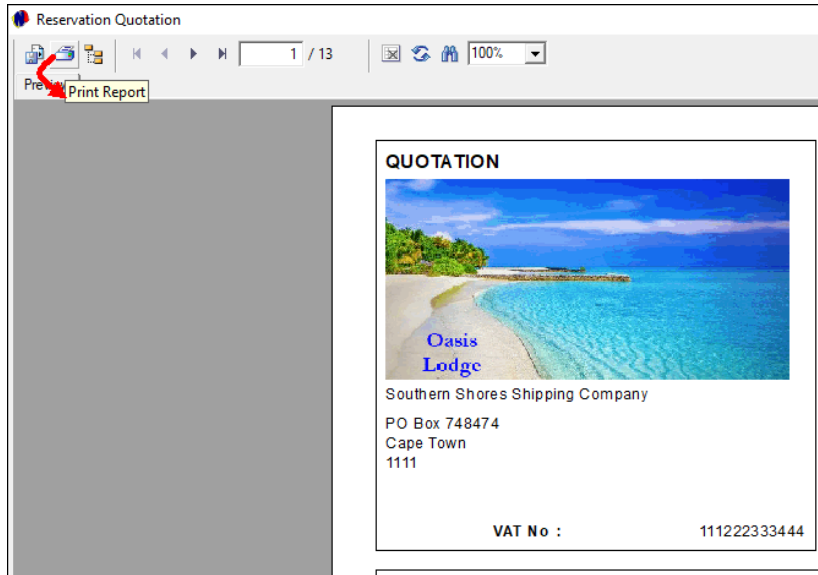
When a quotation is accepted and converted into Reservations, the discount will be displayed on the Group Reservation's Additional Costs tab and can be amended or removed while the reservation's status is either Provisional; Confirmed or In-House.

As soon as the reservation's status is changed to 'Departed' and saved, an 'In-House' credit note is automatically issued against the reservation.

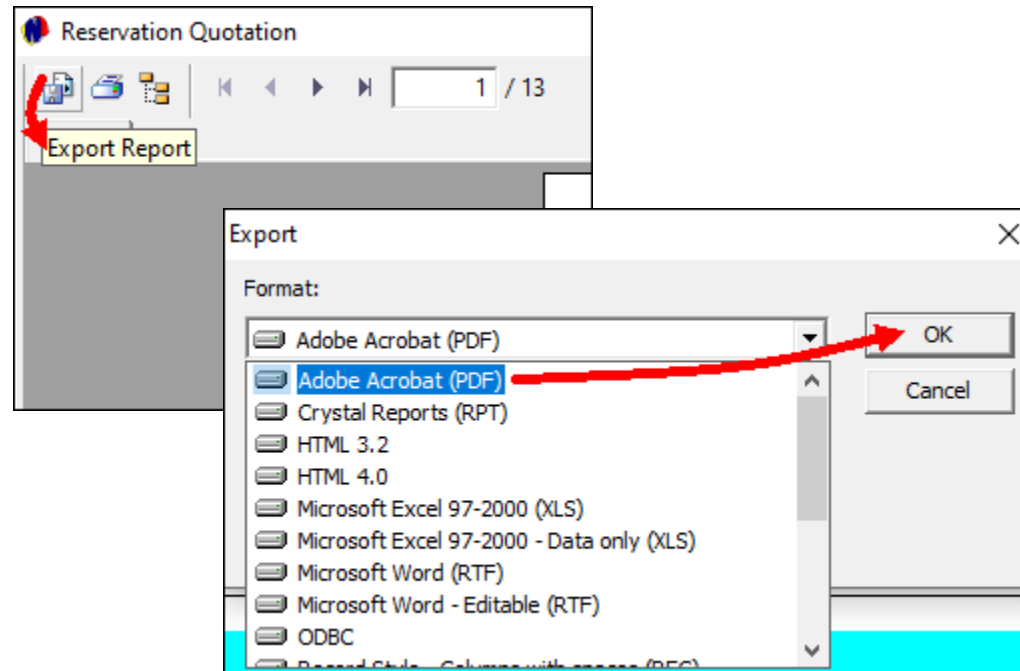
The invoice and statement will display the credit, and the amount will be deducted from the total accordingly.



Creating a Quotation in Novtel



Quotations can be printed to a selected printer, or it can be exported to PDF format, saved, and emailed to the Customer as an attachment.





Novtel[®]

Hospitality Management

The Quoting System

5

**Converting a Quote to
a Group Reservation**



Converting a Quote to a Group Reservation

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Quotation

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/05/30 End Date: 2022/06/02

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

Select All

Select None

0

Move Booking/s

Remove Line/s

Room/Item	QL	DE	RQ	Guest	Guest Name / Item Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl	
0	PRO001	26	ER	0	SSS001	Projector				2022/05/30	2022/06/02	4			3	0	0	0	4500.00
1	CRE001	29	1	0	SSS001	Refreshments Day 1 - Sess				2022/05/30	2022/05/30	1			13	0	0	0	715.00
2	CON010	30	1	0	SSS001	Conference Lunch Option				2022/05/30	2022/05/30	1			13	0	0	0	3250.00
3	CON013	37	1	0	SSS001	Conference Dinner - Option				2022/05/30	2022/05/30	1			13	0	0	0	3250.00
4	CRE004	39	1	0	SSS001	Refreshments Day 2 - Sess				2022/05/31	2022/05/31	1			13	0	0	0	715.00
5	CON011	40	1	0	SSS001	Conference Lunch Option				2022/05/31	2022/05/31	1			13	0	0	0	3250.00
6	CON014	41	1	0	SSS001	Conference Dinner Option				2022/05/31	2022/05/31	1			13	0	0	0	3250.00
7	CRE006	42	1	0	SSS001	Refreshments Day 3 - Sess				2022/06/01	2022/06/01	1			13	0	0	0	715.00
8	CON012	43	1	0	SSS001	Conference Lunch Option				2022/06/01	2022/06/01	1			13	0	0	0	3250.00
9	CON015	44	1	0	SSS001	Conference Dinner Option				2022/06/01	2022/06/01	1			13	0	0	0	3250.00
10	ZLA001	45	1	0	SSS001	Zip Line Adult				2022/06/02	2022/06/02	1			13	0	0	0	2210.00

Accept

PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation

DC - Duration Charged GT - Guest/Item Total Available Unavailable

DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

When the Customer is satisfied with the quotation, they will formally accept it, and the reservations will have to be created.

For quotation 93, the 'Create Events as Additional Cost' option is ticked and therefore the ticket reservations can ONLY be made from the Group Reservation itself, and the tickets also issued from there.

Because of the fact that this option is selected, the Event reservation will not be available from the dedicated Event Management screen, and the ticket office will not have the capability to print these tickets from their system.



Converting a Quote to a Group Reservation

The status of a quotation cannot be changed directly from 'Quotation' to 'Completed' to create the reservations on the Grid.

When a quotation is accepted, the Status is first changed to 'Accepted', after which the action is saved by clicking 'Accept' and 'Yes' to process the change.

Please note that the reservations will not yet be created on the Grid upon changing the status to 'Accepted'.

The status of this quotation is now displayed as 'Accepted' in the 'Select Reservation Quotation' window too when searching for an existing quotation.

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Accepted

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/05/30 End Date: 2022/06/02

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒ Create Events As Add Cost ☒ Consolidate Acc Packages ☒

Move Booking/s Remove Line/s

Room/Item	OL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1-5	Total	Select	
PR0001	26	ER	0	SSS00	Projector					2022/05/30	2022/06/02	4				3	0	0	0	4500.00	
CRE001	29	1	0	SSS00	Refreshments Day 1 - S												0	0	0	715.00	
CON010	30	1	0	SSS00	Conference Lunch Opt												0	0	0	3250.00	
CON013	37	1	0	SSS00	Conference Dinner - Op												0	0	0	3250.00	
CRE004	39	1	0	SSS00	Refreshments Day 2 - S												0	0	0	715.00	
CON011	40	1	0	SSS00	Conference Lunch Opt												0	0	0	3250.00	
CON014	41	1	0	SSS00	Conference Dinner Opt												0	0	0	3250.00	
CRE006	42	1	0	SSS00	Refreshments Day 3 - S												0	0	0	715.00	
CON012	43	1	0	SSS00	Conference Lunch Opt												0	0	0	3250.00	
CON015	44	1	0	SSS00	Conference Dinner Opt					2022/06/01	2022/06/01	1				13	0	0	0	3250.00	
ZLA001	45	1	0	SSS00	Zip Line Adult					2022/06/02	2022/06/02	1				13	0	0	0	2210.00	

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

Quotation

Quotation: New Quotation Copy Quotation Description: Status: Quotation

Select Reservation Quotations

Number	Description	Customer Code	Customer Description	Start Date	Status
64	Great High School Team Building	GRE002	Great High School	2020/07/15	Quotation
70	DSAB - 10-11 July 2020	MAA001	Maatens, Danielle	2020/07/10	Accepted
80	Great High School Team Building	MOS001	Mossel Bay High School	2020/07/15	Quotation
90	Test	DIS001	Discover SA and Beyond	2022/04/12	Accepted
91	Test	AND002	Anderson, Peter	2022/04/13	Quotation
92	V7.8.0.8 Test Quote	DIS001	Discover SA and Beyond	2022/05/05	Quotation
93	SSS Conference June 2022	SSS001	Southern Shores Shipping Company	2022/05/30	Accepted
94	Test	DIS001	Discover SA and Beyond	2022/05/05	Quotation
95	Test May 2022	AFR001	Africa Tours	2022/05/12	Quotation

Search By: Number Search For:

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close



Converting a Quote to a Group Reservation

The quotation will only be converted to reservations on the Grid once the status is changed to 'Completed' and the changes saved.

VERY IMPORTANT:

Check that the Guest Totals for each reservation are correct - as well as the totals for the accommodation package items - before proceeding since the Activity Tracker will be updated accordingly.

The User will encounter this message if the Guest Total and Accommodation Package item totals do not correspond – as in the case of Quotation 60, and for Room D202 where 2 Guests are to be accommodated, but only 1 meal is set.

In such a case, first correct the totals before continuing.

Quotation

Quotation: **60** Copy Quotation Description: **SSS Conference July 2020** Status: **Completed**

Customer Code: **SSS001** Southern Shores Shipping Company
Country: **South Africa**
Start Date: **2020-07-03** End Date: **2020-07-06**
Order Number:
Reservation Type: **9** Venue Hire

Apply Service Charge ☒
Create Events As Add Cost ☒
Consolidate Acc Packages ☒

Select All
Select None
0
Move Booking/s
Remove Line/s

Novtel Hospitality

Accommodation Package Totals Less Than The Guest Total - Room: D202. Continue?

Yes No

Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
20-07-01	2020-07-01	3	C2B001		4	0	0	0	0.00
20-07-03	2020-07-06	3	HDR001	2	2	2	0	0	3600.00
20-07-01	2020-07-01	3	HDR001		2	0	0	0	0.00
D202	91	0	SSS001	Southern Shores Shipping	2	2	2	0	3600.00
BUF001	98	1	SSS001	Buffet Breakfast - Adults		1	0	0	0.00
S101	92	0	SSS001	Southern Shores Shipping	2	1	1	0	2700.00
BUF001	99	1	SSS001	Buffet Breakfast - Adults		1	0	0	0.00
VEN001	94	0	SSS001	Southern Shores Shipping	9	13	13	0	45000.00



Converting a Quote to a Group Reservation

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Completed

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/05/30 End Date: 2022/06/02

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Apply Service Charge ☒

Create Events As Add Cost ☒

Consolidate Acc Packages ☒

0

Move Booking/s

Remove Line/s

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	Note	PP	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1 - 5	Total Incl
PRO001	26	ER	0	SSS00	Projector					2022/05/30	2022/06/02	4			3	0	0	0	4500.00
CRE001	29	1	0	SSS00	Refreshments Day 1 - Sess					2022/05/30	2022/05/30	1			13	0	0	0	715.00
CON010	30	1	0	SSS00	Conference Lunch Option					2022/05/30	2022/05/30	1			13	0	0	0	3250.00
CON013	37	1	0	SSS00	Conference Dinner - Option					2022/05/30	2022/05/30	1			13	0	0	0	3250.00
CRE004	39	1	0	SSS00	Refreshments Day 2 - Sess					2022/05/31	2022/05/31	1			13	0	0	0	715.00
CON011	40	1	0	SSS00	Conference Lunch Option					2022/05/31	2022/05/31	1			13	0	0	0	3250.00
CON014	41	1	0	SSS00	Conference Dinner Option					2022/05/31	2022/05/31	1			13	0	0	0	3250.00
CRE006	42	1	0	SSS00	Refreshments Day 3 - Sess					2022/06/01	2022/06/01	1			13	0	0	0	715.00
CON012	43	1	0	SSS00	Conference Lunch Option					2022/06/01	2022/06/01	1			13	0	0	0	3250.00
CON015	44	1	0	SSS00	Conference Dinner Option					2022/06/01	2022/06/01	1			13	0	0	0	3250.00
ZLA001	45	W	0	SSS00	Zip Line Adult					2022/06/02	2022/06/02	1			13	0	0	0	2210.00

Accept

PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation

DC - Duration Charged GT - Guest/Item Total Available Unavailable

DE - Department RQ - Room Type Qty

<< First < Previous Next > Last >> Quotation Close

To convert the Quotation into a Group Reservation, change the quotation's status to 'Completed'; click 'Accept' and confirm the action of creating the reservations by clicking 'Yes'.

As specific rooms were selected when the quote was created, the process to convert the quotation into a reservation, is straight forward.

Novtel Hospitality

Would you like to proceed with the process of creating the Reservations?

Yes No



Converting a Quote to a Group Reservation

If Novtel finds a room or rooms that was linked to the Quotation, but have been booked in the meantime, this report will be displayed.

Rooms which are available for the entire required period, will be displayed in a green background colour on the Quotation screen.

However: If the selected room(s) are not available anymore since a booking was made for the room in the meantime by another guest, the room will be displayed in a red background colour, and a different room must be selected – as in the case of Room C001.

Overlapping existing Reservations - Failure List	
PRINTED DATE: 18 MAY 2022 TIME: 2:00:53 PM	
Overlapping existing Reservations - Failure List	
Room #	C001
Overlapping existing Reservation	

Quotation

Quotation Description : Status :

Customer Code :

Country :

Start Date : End Date :

Order Number :

Reservation Type :

☐ Apply Service Charge

☒ Create Events As Add Cost

☒ Consolidate Acc Packages

Select All

Select None

Move Booking/s

Remove Line/s

Accept

PP - Per Person

TR - Tariff to Reservation

CR - Charges to Reservation

DC - Duration Charged

GT - Guest/Item Total

Available ☐ Unavailable ☒

<< First

< Previous

Next >

Last >>

Quotation

Close

DE - Department

RQ - Room Type Qty



Converting a Quote to a Group Reservation

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Completed

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/05/30 End Date: 2022/06/02 Apply Service Charge

Order Number: SSS0822 Create Events As Add Cost

Reservation Type: 2 Bed and Breakfast Consolidate Acc Packages

Select All
Select None
0
Move Booking/s
Remove Line/s

Room/Item	QL	DE	RQ	Guest	Guest Name / Item	TR	CR	Date In	Date Out	DC	Tariff	Type	GT	Adult	Child	Child 1-5	Total Incl	
11	ZWR001	46	FR	0	SSS00	White Water Rafting - Adu			2022/05/02	2022/06/02	1			13	0	0	0	3900.00
12	OFA001	47		0	SSS00	Overflow Accommodation			2022/05/30	2022/06/02	4			1	0	0	0	5980.00
13	COF001	48		0	SSS00	Coffee Americano			2022/05/30	2022/06/02	4			117	0	0	0	1755.00
14	AAA001	49	ER	0	SSS00	Approved Discount			2022/05/30	2022/05/30	1			1	0	0	0	-5000.00
15	USHAPE	65		0	SSS00	Room Setup - U-Shape			2022/05/30	2022/05/30	1			1	0	0	0	0.00
16	C001	86	RV	0	SSS00	Southern Shores Shipping			2022/05/30	2022/06/02	3	C2B001	2	4	0	0	0	4200.00
17	BUF001	87	1	0	SSS00	Buffet Breakfast - Adults			2022/05/31	2022/06/02	3	C2B001		4	0	0	0	0.00
18	BUF002	88	1	0	SSS00	Buffet Breakfast - Children			2022/05/31	2022/06/02	3	C2B001		0	0	0	0	0.00
19	C002	89	RV	0	SSS00	Southern Shores Shipping			2022/05/30	2022/06/02	3	C2B001	2	4	4	0	0	4200.00
20	BUF001	90	1	0	SSS00	Buffet Breakfast - Adults			2022/05/31	2022/06/02	3	C2B001		4	0	0	0	0.00
21	BUF002	91	1	0	SSS00	Buffet Breakfast - Children			2022/05/31	2022/06/02	3	C2B001		0	0	0	0	0.00

Accept PP - Per Person TR - Tariff to Reservation CR - Charges to Reservation
DC - Duration Charged GT - Guest/Item Total Available Unavailable
DE - Department RQ - Room Type Qty

By selecting the line for a room which is no longer available, and clicking on the 'Change Room' button, an available room can be selected instead.

Available Rooms

Search

Search By: Code

Search For:

Code	Description
C002	Chalet 2 - 2 Bedroom
C003	Chalet 3 - 2 Bedroom
C004	Chalet 4 - 3 Bedroom
C005	Chalet 5 - 3 Bedroom
CA01	Camping 1
CA02	Camping 2
CA03	Camping 3
CA04	Camping 4
CO01A	Staff Room 1
D201	Room 201 - Double
D202	Room 202 - Double
D203	Room 203 - Double
D204	Room 204 - Double
HMS001	Honeymoon Suite 1
HMS002	Honeymoon Suite 2
S101	Room 101 - Single
S102	Room 102 - Single
S103	Room 103 - Single
S104	Room 104 - Single
STA1	Staff Room 2
VEN001	Conference Room 1
VEN002	Conference Room 2
VEN003	Conference Room 3
VEN004	Conference Room 4
VEN005	Wedding Venue and Chapel
XTUL01	Single Hotel Room - Tulip Inn
XTUL02	Single Hotel Room - Tulip Inn
XTUL03	Single Hotel Room - Tulip Inn

Accept Cancel



Converting a Quote to a Group Reservation

Quotation

Quotation: 93 Copy Quotation Description: SSS Conference June 2022 Status: Completed

Customer Code: SSS001 Southern Shores Shipping Company

Country: South Africa

Start Date: 2022/05/30 End Date: 2022/06/02 Apply Service Charge: ☒ Create Events As Add Cost: ☒ Consolidate Acc Packages: ☒

Order Number: SSS0822

Reservation Type: 2 Bed and Breakfast

Select All
Select None
0
Move Booking/s
Remove Line/s

Room/Item	Ql	DE	RIQ	Guest	Guest Name	Novtel Hospitality	GT	Adult	Child	Child 1-5	Total Incl
11 ZWR001	46	FR	0	SSS00	White Water R		13	0	0	0	3900.00
12 OFA001	47	0	SSS00	Overflow Acco			1	0	0	0	5980.00
13 COF001	48	0	SSS00	Coffee America			117	0	0	0	1755.00
14 AAA001	49	ER	0	SSS00	Approved Disc		1	0	0	0	5000.00
15 USHAPE	65	0	SSS00	Room Setup - U			1	0	0	0	0.00
16 C003	86	RV	0	SSS00	Southern Shore		2	4	4	0	4200.00
17 BUF001	87	1	0	SSS00	Buffet Breakfast - Adults		4	0	0	0	0.00
18 BUF002	88	1	0	SSS00	Buffet Breakfast - Children		0	0	0	0	0.00
19 C003	89	RV	0	SSS00	Southern Shores Shipping		2	4	4	0	4200.00
20 BUF001	90	1	0	SSS00	Buffet Breakfast - Adults		4	0	0	0	0.00
21 BUF002	91	1	0	SSS00	Buffet Breakfast - Children		0	0	0	0	0.00

Would you like to proceed with the process of creating the Reservations?

Yes No

Accept ☒ Per Person ☐ TR - Tariff to Reservation ☐ CR - Charges to Reservation ☐ DC - Duration Charged ☐ GT - Guest/Item Total Available ☒ Unavailable ☐ << First < Previous Next > Last >> Quotation Close

The room has been changed to C003, and clicking 'Accept' and 'Yes', Novtel will ask whether to add Menu and Bar Charges as Additional Cost to the Reservation.

Novtel Hospitality

?

Add Menu and Bar Charges as Additional Cost to Reservation?

Yes No

Yes

Clicking 'Yes', the items added to the quotation which are actual Restaurant and Bar charges, will automatically be displayed on the reservation's Additional Cost tab, and MUST NOT be billed by the restaurant or bar personnel since the charges will be duplicated, and the stock will be deducted twice.

No

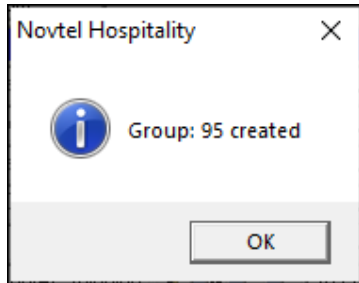
Clicking 'No', the Restaurant and Bar items will NOT be added to the Reservation's Additional Cost tab and must be charged by the Restaurant and Bar personnel directly from the restaurant's Point of Sale system as an 'In-House Group' charge.

In both cases, you will have to clearly communicate to the Restaurant and Bar personnel how the billing process must be conducted to avoid unnecessary mistakes and confusion.

Please familiarise yourself with your company's policy and procedure in this regard.

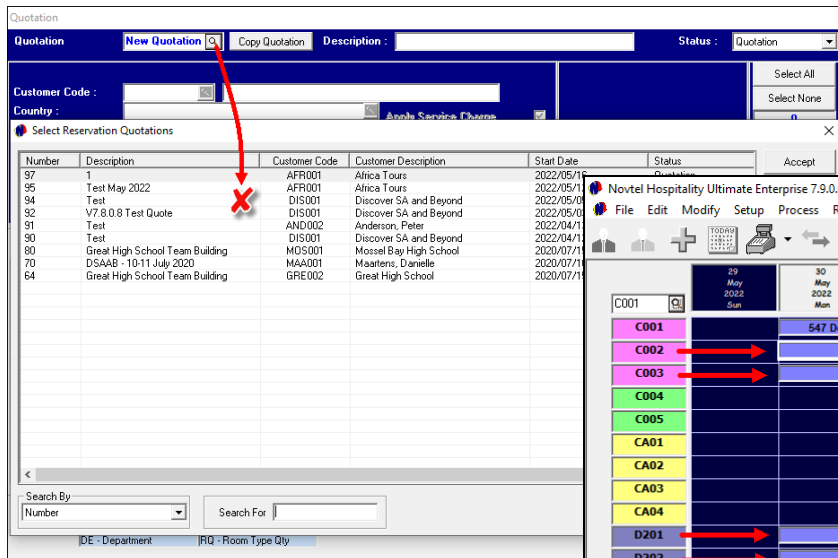


Converting a Quote to a Group Reservation

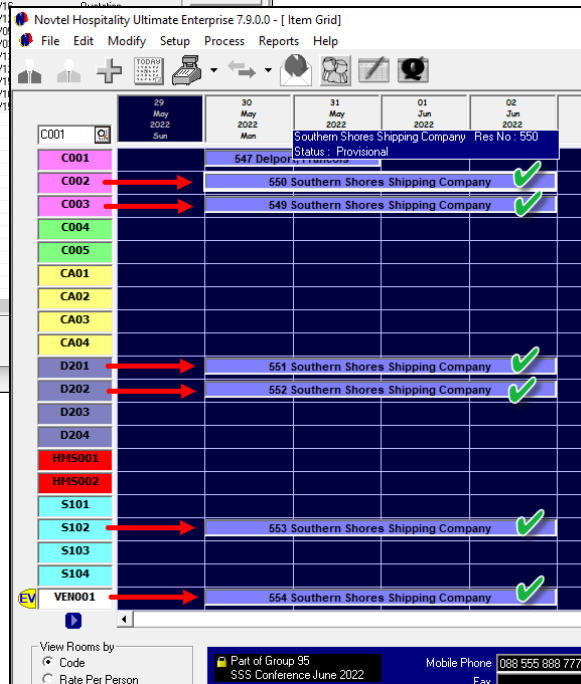


Clicking either 'Yes' or 'No' – in accordance with your company's policy - the Group Reservation is created, and a dedicated Group Number is allocated to it.

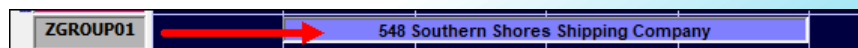
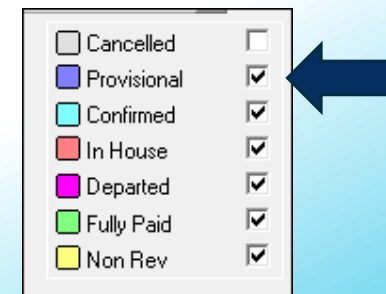
In this case, Group Number 95.



Please note that as Quotation 93 has now been converted into reservations, it is removed from the Quotation screen and is no longer accessible.



Viewing the Grid, the reservations are now displayed in the colour of the 'Provisional' status, and the rooms have been booked.





The Group Reservation

The Group Reservation can be accessed in various ways, of which one these 2 methods can be used:

Method1: From any Reservation linked to the Group

Hovering on a reservation linked to the Group, it is indicated that the reservation is 'Part of Group 95'.

Novtel Hospitality Ultimate Enterprise 7.9.0.0 - [Item Grid]

File Edit Modify Setup Process Reports Help

30 May 2022 Mon 31 May 2022 Tue 01 Jun 2022 Wed 02 Jun 2022 Thu 03 Jun 2022 Fri 04 Jun 2022 Sat 05 Jun 2022 Sun 06 Jun 2022 Mon 07 Jun 2022 Tue

C001 547 Delport, Francois Southern Shores Shipping Company Res No : 550 Status : Provisional

C002 550 Southern Shores Shipping Company

C003 549 Southern Shores Shipping Company

C004

C005

CA01

CA02

CA03

CA04

01 551 Southern Shores Shipping Company

02 552 Southern Shores Shipping Company

D201

D202

HMS001

HMS002

View Rooms by:

Code

Rate Per Person

Rate Per Room

New Reservation

2022/05/30 2022/06/12

Part of Group 95
SSS Conference June 2022

Reservation Number 550
SSS001 Southern Shores Shipping Company
PO Box 748474
Cape Town
11111
sssc@shipping.com

Mobile Phone 088 555 888 777

Fax

Telephone 021 333 444 555

Customer ID 7212310418810

2nd Person's ID 5914569874123

Vehicle Registration CA36521478

Passport Number

Group I

Group I

Group F

Group D

Group De

Gr

Right-clicking on any reservation linked to the Group, the 'Group – View Group Details' option is selected to open the Group Details window for this Group Reservation.

Group Details

Group Number : 95

Group Description : SSS Conference June 2022

PROVISIONAL

General Financial Reservations Additional Costs Quick View In-House

Invoice Number :

Customer Code : SSS001

Customer Description : Southern Shores Shipping Company

Country : South Africa

Start Date : 2022/05/30 End Date : 2022/06/02

Order Number : SSS0822

Group Status : Provisional

Booking Number : 548

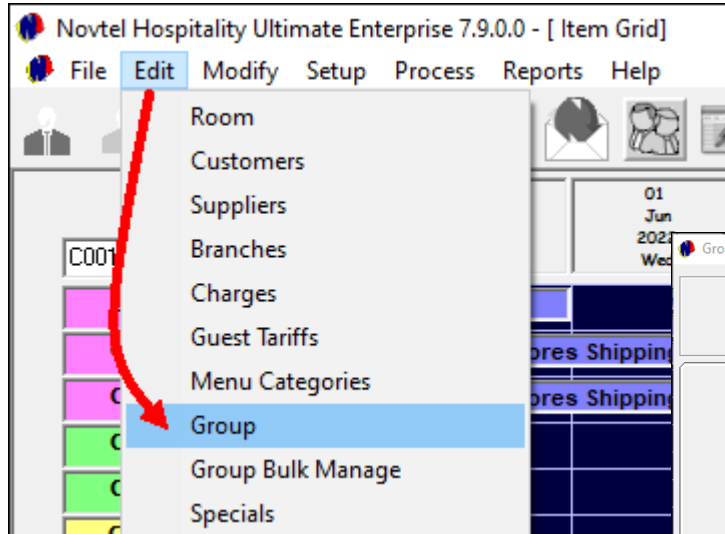
Reservation Type : 2 Bed and Breakfast

ADD NEW EVENT EDIT UPDATE CLOSE

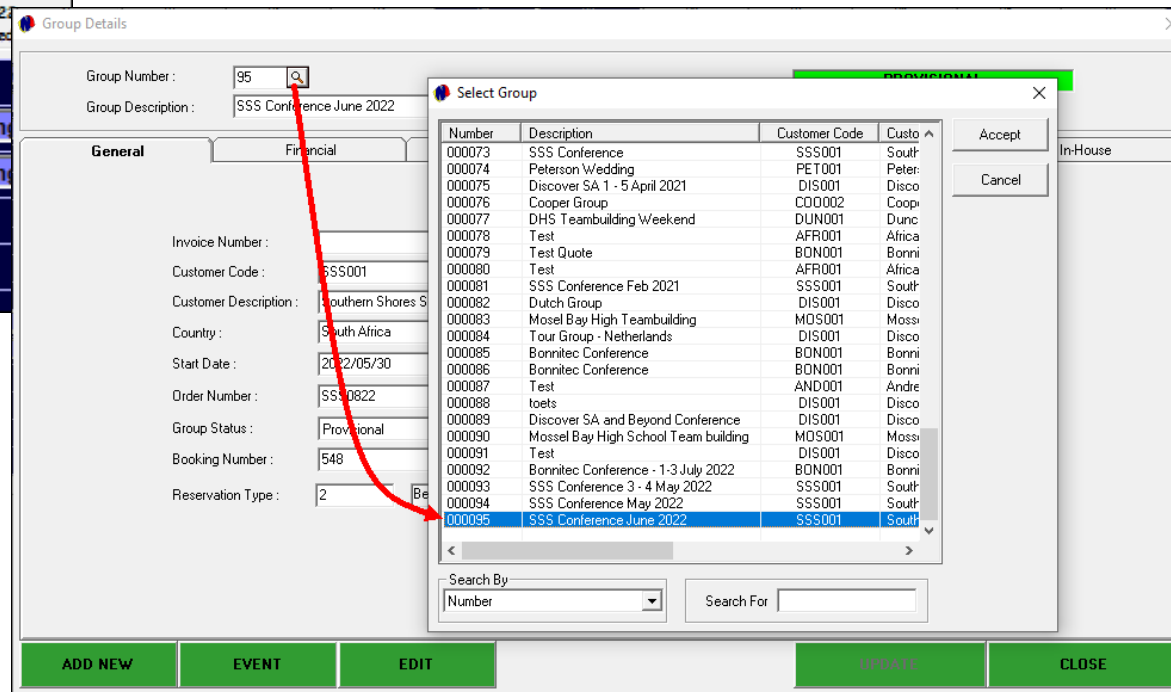


The Group Reservation

Method2: From the 'Edit – Group' menu option



The required Group can be searched for by means of either the Group Number or Group Description; Customer Code or Customer Description, or the Reservation start or end date.





The Group Reservation

Please note that as the 'Create Events as Additional Costs' option were ticked, and the menu and bar charges were also added to the Group Reservation's Additional Costs tab in this case, the charges are displayed on the Group Reservation.

Group Details

Group Number : 95 PROVISIONAL

Group Description : SSS Conference June 2022

General Financial Reservations **Additional Costs** Quick View In-House

Do Not Enter Negative Values For Charges!
Exception: Reservation Discount Charge
AAA001

Line Type	Charge	Description	Qty	Excl	Tax	Incl
Item	PRD001	Projector	3	3913.04	586.96	4500.00
Item	CRE001	Refreshments Day 1 - Session 1	13	621.74	93.26	715.00
Item	CON010	Conference Lunch Option 1	13	2826.09	423.91	3250.00
Item	CON013	Conference Dinner - Option 1	13	2826.09	423.91	3250.00
Item	CRE004	Refreshments Day 2 - Session 1	13	621.74	93.26	715.00
Item	CON011	Conference Lunch Option 2	13	2826.09	423.91	3250.00
Item	CON014	Conference Dinner Option 2	13	2826.09	423.91	3250.00
Item	CRE006	Refreshments Day 3 - Session 1	13	621.74	93.26	715.00
Item	CON012	Conference Lunch Option 3	13	2826.09	423.91	3250.00
Item	CON015	Conference Dinner Option 3	13	2826.09	423.91	3250.00
Item	ZLA001	Zip Line Adult	13	1921.74	288.26	2210.00
Item	ZWR001	White Water Rafting - Adults	13	3391.30	508.70	3900.00
Item	OFA001	Overflow Accommodation	1	5200.00	780.00	5980.00
Item	COF001	Coffee Americano	117	1526.09	228.91	1755.00
Item	AAA001	Approved Discount	1	-4347.83	-652.17	-5000.00
Service	TML001	Tourism Levy	1	555.26	0.00	555.26

35545.26

The Event Reservations will be made from this screen, and the tickets will be issued from here too.

In the case where the menu and bar charges are added to the Group Reservation's Additional Costs tab, the Restaurant must be notified **not** to bill the conference lunches, dinners, Additional Coffee and refreshments from the Restaurant's POS System, as it is already captured here, and the amount added to the reservation.

Also note that no negative amounts are to be entered here – EXCEPT for the Discount Charge Code displayed in the Red block, and which is derived from the Quotation.



Novtel[®]

Hospitality Management

The Quoting System

6

Accessing the Activity Tracker and Activity Sheet



Accessing the Activity Tracker and Activity Sheet

Once the status of a quotation is changed to 'Completed', a Group Reservation is created, and the Activity Tracker is updated according to the information inserted on the Quotation.

IMPORTANT:

The Activity Tracker for Group Reservations will ONLY be relevant when a Quotation was created first, and then converted into a reservation.

For Group Reservations created directly from either the 'Group Bulk Manage' screen, or 'Edit Group Details' screen, the Activity Tracker will not list the booking details and only 'Activity Code' lines can be added to the Activity Tracker screen.



By clicking on the search option in the 'Group Number' field, all Groups linked to the 'Provisional'; 'Confirmed' and 'In-House' statuses are displayed.

As we have created Quotation 93 and converted it into Group 95, we will now search for this Group Reservation and select it.

[illegible]



Accessing the Activity Tracker and Activity Sheet

Activity Tracker

Group Number : 95 Description : SSS Conference June 2022

Customer Code : SSS001 Southern Shores Shipping Company

Start Date : 2022/05/30 End Date : 2022/06/02

Order Number : SSS0822

Select All
Select None
0
Remove Line/s

Add Activity Code

Room/Item	AL	Department	Location	Report Grouping	Action Date	Time Start	Time End	Note	Package	QTY	QTY	Total Incl
0	AAA001	72	CONFER	CHALET	ACCOM	2022/05/30	12:00	12:00		0	1	5000.00
1	C002	77	RESERV	CHALET	ACCOM	2022/05/30	12:00	12:00		0	4	4200.00
2	C003	74	RESERV	CHALET	ACCOM	2022/05/30	12:00	12:00		0	4	4200.00
3	D201	80	RESERV	HOTEL	ACCOM	2022/05/30	12:00	12:00		0	2	3600.00
4	S102	86	RESERV	HOTEL	ACCOM	2022/05/30	12:00	12:00		0	1	2700.00
5	D202	83	RESERV	HOTEL	ACCOM	2022/05/30	7:00	8:00		0	2	3600.00
6	COF001	68	LHREST	LHREST	CATERING	2022/05/30	12:00	12:00		0	117	1755.00
7	CRE001	53	LHREST	CONFER1	CATERING	2022/05/30	11:00	11:45		0	13	715.00
8	CON010	54	LHREST	LHREST	CATERING	2022/05/30	1:00	2:00		0	13	3250.00
9	CON013	55	LHREST	LHREST	CATERING	2022/05/30	8:00	9:00		0	13	3250.00
10	VEN001	89	CONFER	CONFER1	CONFERENCE	2022/05/30	12:00	12:00		0	13	45000.00

Accept << First < Previous Next > Last >> Report Close

The Activity Tracker window for this Group Reservation is displayed as follows, and spans over a few pages – which can be accessed by clicking on the relevant buttons at the bottom of the screen.

All details – as entered on the Quotation – will now be displayed here per line item.

The ‘Department’ linked to each room and charge, will also be indicated here.

If a Department, Location or Report Grouping is not inserted; or it is inserted incorrectly; or the Location for a day must be changed, you will be able to alter it by clicking on the ‘Search’ button in the relevant field, and select the required option.

Hovering on a specific Room or Charge code, the description thereof will be displayed at the top of the screen.

Activity Tracker

Group Number : 95 Description : SSS Conference June 2022

Customer Code : SSS001 Southern Shores Shipping Company

Start Date : 2022/05/30 End Date : 2022/06/02

Order Number : SSS0822

Add Activity Code

Chalet 2 - 2 Bedroom

Room/Item	AL	Department	Location	Report Grouping	Action Date	Time Start	Time End	Note
0	AAA001	72	CONFER	CHALET	ACCOM	2022/05/30	12:00	12:00
1	C002	77	RESERV	CHALET	ACCOM	2022/05/30	12:00	12:00
2	C003	74	RESERV	CHALET	ACCOM	2022/05/30	12:00	12:00
3	D201	80	RESERV	HOTEL	ACCOM	2022/05/30	12:00	12:00
4	S102	86	RESERV	HOTEL	ACCOM	2022/05/30	12:00	12:00



Accessing the Activity Tracker and Activity Sheet

Activity Tracker

Group Number : 95 Description : SSS Conference June 2022

Note :
3 additional coffees per day per person = 39 per day to be catered for on 30 and 31 May, as well as 1 June.

Select All
Select None
0
Remove Line/s
Close

Room/Item	AL	Department	Location	Report Grouping	Action Date	Time Start	Time End	Note
0	AAA001	72	CONFER		2022/05/30	12:00	12:00	
1	C002	77	RESERV	CHALET	2022/05/30	12:00	12:00	
2	C003	74	RESERV	CHALET	2022/05/30	12:00	12:00	
3	D201	80	RESERV	HOTEL	2022/05/30	12:00	12:00	
4	S102	86	RESERV	HOTEL	2022/05/30	12:00	12:00	
5	D202	83	RESERV	HOTEL	2022/05/30	7:00	8:00	
6	COF001	68	LHREST	LHREST	2022/05/30	12:00	12:00	
7	CRE001	53	LHREST	CONFER1	2022/05/30	11:00	11:45	
8	CON010	54	LHREST	LHREST	2022/05/30	1:00	2:00	
9	CON013	55	LHREST	LHREST	2022/05/30	8:00	9:00	
10	VEN001	89	CONFER	CONFER1	2022/05/30	12:00	12:00	

Accept << First < Prev

The Action Date; Start, and End Times are derived from the settings on the Quotation.

However: If needed, it can be changed on the Activity Tracker.

Per line item, existing notes can be accessed, viewed or changed if required. New notes can also be captured.

No charges or rooms can be added to the Activity Tracker, but if needed, Activity Codes can be added to capture additional information.

Activity Tracker

Group Number : 95 Description : SSS Conference June 2022

Customer Code : SSS001 Start Date : 2022/05/30 End : Order Number : SSS0822

Select Activity Codes

Code	Description
BILLING	Billing Action
CINEMA	Room Setup - Cinema
CLEANUP	Cleanup
SNACKS	Refreshments
USHAPE	Room Setup - U-Shape
ZIPLINE	Zip Line Activity Extra Timeslot

Accept Cancel

Add Activity Code

Room/Item	AL	Department	Location
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Accessing the Activity Tracker and Activity Sheet

Event Charges will also be displayed on the Activity tracker – If quoted on.

VERY IMPORTANT:

This does not mean that the Event Timeslots have been booked and the availability reduced!! Not by all means!

The Event Reservations will EITHER be made from the Grid Reservation if the 'Add Events as Additional Cost' option was ticked at the time of converting the quotation into a reservation,

OR

If the option was unticked, the Event Reservations will be created from the dedicated Event Manager's screen.

Activity Tracker

Group Number : 95 Description : SSS Conference June 2022

Customer Code : SSS001 Southern Shores Shipping Company

Start Date : 2022/05/30 End Date : 2022/06/02

Order Number : SSS0822

Select All
Select None
0
Remove Line/s

Add Activity Code White Water Rafting - Adults

	Room/Item	AL	Department	Location	Report Grouping	Action Date	Time Start	Time End	Note	Package	QTY	QTY	Total Incl	*
44	ZWR001	63	TO-FR	RIVER	ACTIVITY	2022/06/02	11:00	1:00			0	13	3900.00	
45	ZLA001	62	TO-FW	WOODS	ACTIVITY	2022/06/02	8:00	10:00			0	13	2210.00	
46	COF001	71	LHREST	LHREST	CATERING	2022/06/02	12:00	12:00			0	117	0.00	
47	VEN001	92	CONFER	CONFER1	CONFERENCE	2022/06/02	12:00	12:00			0	13	0.00	
48	PRO001	52	CONFER	CONFER1	EQUIPMENT	2022/06/02	8:00	5:00			0	3	0.00	
49	OFA001	67		SAFARI	OVERFLOW	2022/06/02	12:00	12:00			0	1	0.00	
						2022/05/17	8:00	8:00			0	0	0.00	
						2022/05/17	8:00	8:00			0	0	0.00	
						2022/05/17	8:00	8:00			0	0	0.00	
						2022/05/17	8:00	8:00			0	0	0.00	
						2022/05/17	8:00	8:00			0	0	0.00	

Accept << First < Previous Next > Last >> Report Close



Accessing the Activity Tracker and Activity Sheet

By clicking on the 'Report' button, the 'Activity Sheet' is accessed.

At the top of the window, the 'Group / Quote' line displays the Group number linked to this Activity Sheet – which is 95 – and the quotation number of the quote converted into reservations – which was quotation 93.

Please check all details again to ensure that everything has been captured correctly.

Activity Tracker

Group Number : 95 Description : SSS Conference June 2022

Customer Code : SSS001 Southern Shores Shipping Company

Start Date : 2022/05/30 End Date : 2022/06/02

Order Number : SSS0822

Select All
Select None
0
Remove Line/s

Room/Item	AL	Department	Location	Report Grouping	Action Date	Time Start	Time End	Note	Package	QTY	QTY	Total Incl
0	AAA001	72	CONFER		2022/05/30	12:00	12:00			0	1	-5000.00
1	C002	77	RESERV	CHALET	2022/05/30	12:00	12:00			0	4	4200.00
2	C003	74	RESERV	CHALET	2022/05/30	12:00	12:00			0	4	4200.00
3	D201	80	RESERV	HOTEL	2022/05/30	12:00	12:00			0	2	3600.00
4	S102	86	RESERV	HOTEL	2022/05/30	12:00	12:00			0	1	2700.00
5	D202	83	RESERV	HOTEL	2022/05/30	7:00	8:00			0	2	3600.00
6	COF001	68	LHREST	LHREST	2022/05/30	12:00	12:00			0	117	1755.00
7	CRE001	53	LHREST	CONFER1	2022/05/30	11:00	11:45			0	13	715.00
8	CON010	54	LHREST	LHREST	2022/05/30	1:00	2:00			0	13	3250.00
9	CON013	55	LHREST	LHREST	2022/05/30	8:00	9:00			0	13	3250.00
10	VEN001	89	CONFER	CONFER1	2022/05/30	12:00	12:00			0	13	45000.00

Accept << First < Previous Next > Last >> Report Close

ACTIVITY SHEET

Oasis Lodge

Southern Shores Shipping Company

PO Box 748474
Cape Town
1111

VAT No : 111222333444

Date : 2022/05/17
Start Date : 2022/05/30
End Date : 2022/06/02
Group / Quote # : 95 / 93

Oasis Lodge
77 Long Beach Road
Long Beach
Mossel Bay
6500
South Africa

Tel : 044 123456789
Fax : 044 123456789
Email : oasis@restaurant.com
VAT No : 123456789

30 May 2022

Start	End	No's	Description
00:00	00:00	1	Approved Discount Booking Number: 548

Accommodation

Chalet Area

Start	End	No's	Description
00:00	00:00	4	Chalet 2 - 2 Bedroom Booking Number: 550



Accessing the Activity Tracker and Activity Sheet

As the start date for our Group Reservation is the 30th of May, all line items for this date are grouped first according to the settings selected.

The 'Accommodation' Grouping Option is displayed in the grey background.

And the 'Location' is displayed in the blue background.

ACTIVITY SHEET

Oasis Lodge
Southern Shores Shipping Company
PO Box 748474
Cape Town
1111

VAT No :

Date : 2022/05/17
Start Date : 2022/05/30
End Date : 2022/06/02
Group / Quote # : 95 / 93

Oasis Lodge
77 Long Beach Road
Long Beach
Moss Bay
6500
6789
6789
6789

Activity Tracker

Group Number : 95 Description : SSS001 Southern Shores Shipping Company

Customer Code : SSS001 Southern Shores Shipping Company

Start Date : 2022/05/30 End Date : 2022/06/02

Order Number : SSS0822

Room/Item	AL	Department	Location	Report Grouping	Action
0 AAA001	72	CONFER			2022/05/30
1 C002	77	RESERV	CHALET	ACCOM	2022/05/30
2 C003	74	RESERV	CHALET	ACCOM	2022/05/30
3 D201	85	RESERV	HOTEL	ACCOM	2022/05/30
4 S102	86	RESERV	HOTEL	ACCOM	2022/05/30
5 D202	83	RESERV	HOTEL	ACCOM	2022/05/30

30 May 2022

Start	End	No's	Description
00:00	00:00	1	Approved Disc Booking Number

Room/Item	AL	Department	Location	Report Grouping	Action
0 AAA001	72	CONFER			2022/05/30
1 C002	77	RESERV	CHALET	ACCOM	2022/05/30
2 C003	74	RESERV	CHALET	ACCOM	2022/05/30
3 D201	85	RESERV	HOTEL	ACCOM	2022/05/30
4 S102	86	RESERV	HOTEL	ACCOM	2022/05/30
5 D202	83	RESERV	HOTEL	ACCOM	2022/05/30

Start	End	No's	Description
00:00	00:00	4	Chalet 2 - 2 Bed Booking Number
00:00	00:00	4	Chalet 3 - 2 Bedroom Booking Number: 548

Start	End	No's	Description
00:00	00:00	2	Room 201 - Double Booking Number: 551
00:00	00:00	1	Room 102 - Single Booking Number: 553

30 May 2022			
Accommodation			
Start	End	No's	Description
07:00	08:00	2	Room 202 - Double Booking Number: 552
Catering			
Conference Room 1			
Start	End	No's	Description
11:00	11:45	13	Refreshments Day 1 - Session 1 Booking Number: 548 Coffee and / or tea Variety of Muffins
Lighthouse Restaurant			
Start	End	No's	Description
00:00	00:00	117	Coffee Americano Booking Number: 548 3 additional coffees per day per person = 39 per day to be catered for on 30 and 31 May, as well as 1 June.
13:00	14:00	13	Conference Lunch Option 1 Booking Number: 548 ONE Coffee, tea OR Soft drink Included per person Salad Bar available - Variety of salads Starter Vegetable Soup and freshly Baked Bread Main Buffet - Roast Beef, pork belly and chicken pie Sweet potato, grilled mixed veg, green beans, rice. Desert Chocolate Mouse peppermint crisp tart fresh mixed fruit
20:00	21:00	13	Conference Dinner - Option 1 Booking Number: 548
Conference			
Conference Room 1			
Start	End	No's	Description
00:00	00:00	13	Conference Room 1 Booking Number: 554



Accessing the Activity Tracker and Activity Sheet

The screenshot shows a web application titled "Activity Sheet". At the top, there is a navigation bar with a "Preview" tab selected. Below the navigation bar, the main content area displays a preview of a document. The document text is as follows:

Thank you for allowing us to look after your event at our facility. Below are our contract, terms and conditions. Please initial each page and sign the last page in full.

BOOKING AGREEMENT

Between Oasis Lodge (Pty) Ltd (hereinafter called 'Oasis Lodge')

And

_____ (hereinafter called "the client")

1. DETAILS OF BOOKING

a. Attached is a copy of the Quotation with details of the booking.

b. Please check that you are satisfied that the details are correct, and email or fax a signed copy back to your Oasis Lodge Representative, as per the details on the Quotation.

c. Any changes must be made in writing.

2. MARKETING OF EVENT

a. Oasis Lodge has an extensive website www.novtel.com and is always looking for interesting stories. Should the client wish to publicize the event, please send the necessary information and pictures to info@novtel.co.za and a Novtel representative will contact you.

b. All information appearing on the website in this regard will be approved by the client before publication.

3. FOOD AND BEVERAGE

a. Should the client require menu options, please request the menu pack from your Oasis Lodge representative.

b. Please advise the Oasis Lodge representative of your choice and of any dietary requirements in writing.

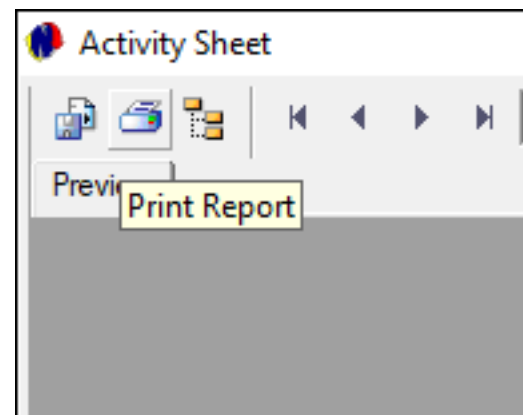
c. If your menu selection has not been received on finalization of your function sheet, Oasis Lodge shall select a menu on your behalf.

Also note that we have set up Terms and Conditions to be displayed on the Activity Sheet, and which is a contract the Customer will sign.

This is displayed as from page 12 to 16 as per our example.

If all is found to be in order, the Activity Sheet can be exported to PDF Format, or printed to a PDF Printer, and emailed to the Group Owner.

It can also be produced and given to the relevant Departments at your facility to inform them of actions to be taken; stock to be bought, and catering items to be prepared.





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The Invoice Module
and Job Tracker Utility
(For the Glass Cutting Industry)



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Management



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Bank Manager



 **Novtel**
Access Control



 **Novtel**
Property Management
Mobile Application

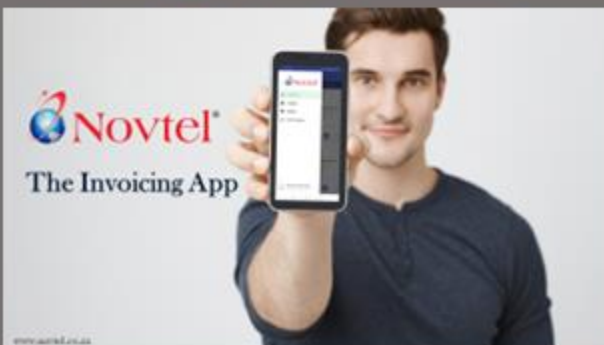
For Resolving Maintenance
Onsite and In your Time



 **Novtel** Relations Management Mobile App



 **Novtel**
The Invoicing App



 **Novtel**

The Online
Application
Website



info@novtel.com

sales@novtel.com



www.novtel.co.za



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