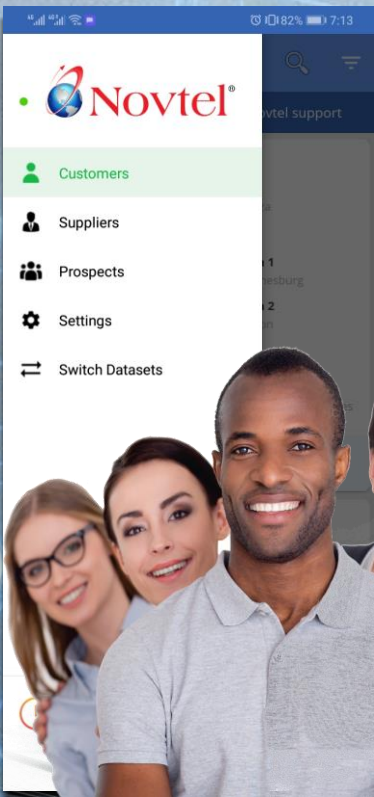




Novtel[®]

Relations Management Mobile App



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2. Setting the Calling Preferences
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4. Customer, Supplier and Prospect Accounts
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Relations Management Mobile App



Introduction



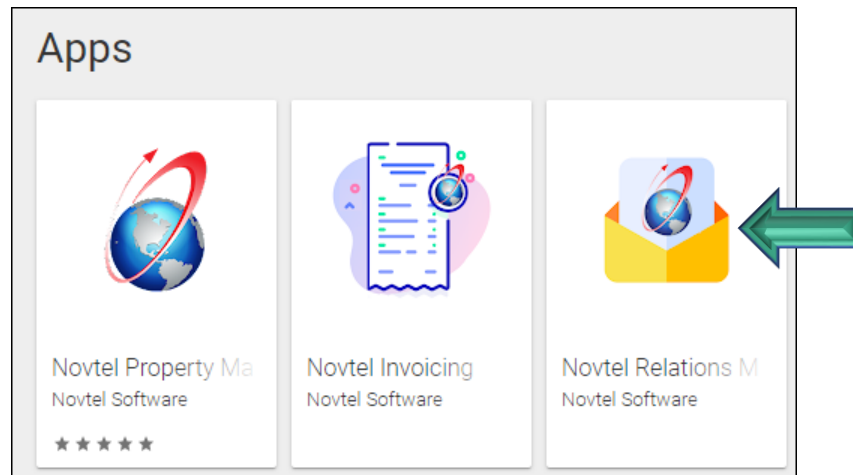
Introduction

The Novtel Relations Management app is available to both existing Novtel clients and any member of the public interested in Novtel Software.

The demo user can simply download the app and test all features on the demo dataset - free of charge!

However:

Please Note that Demo Users will only be able to contact Novtel Support from the demo database.



The Novtel Relations Management app takes existing desktop application correspondence features to the cloud, enabling you to view important information and perform key tasks on-the-go.

<https://play.google.com/store/apps/details?id=za.co.novtel.novtelrelations>

Introduction

Novtel clients can now also view contact details, and communicate with their **Sage Pastel or Sage Evolution Customers and Suppliers** through the Novtel app via:

- Cellphone Number
- Landline Number
- WhatsApp

Prospects:

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

Multiple Dataset Processing:

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



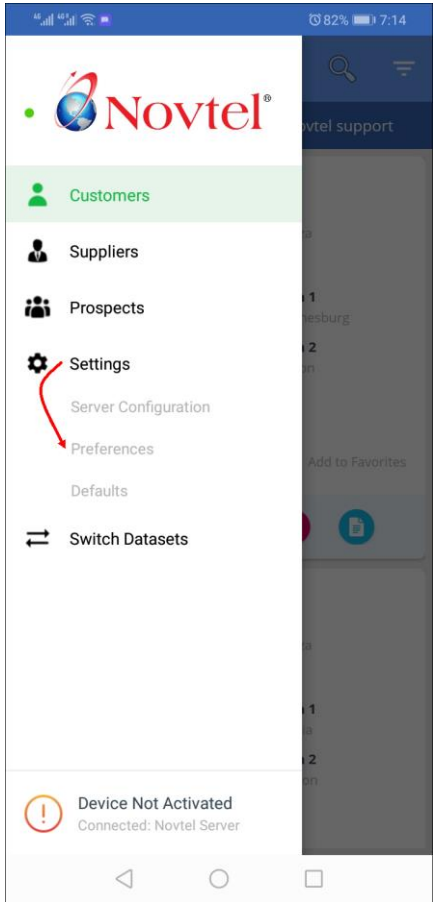
Relations Management Mobile App



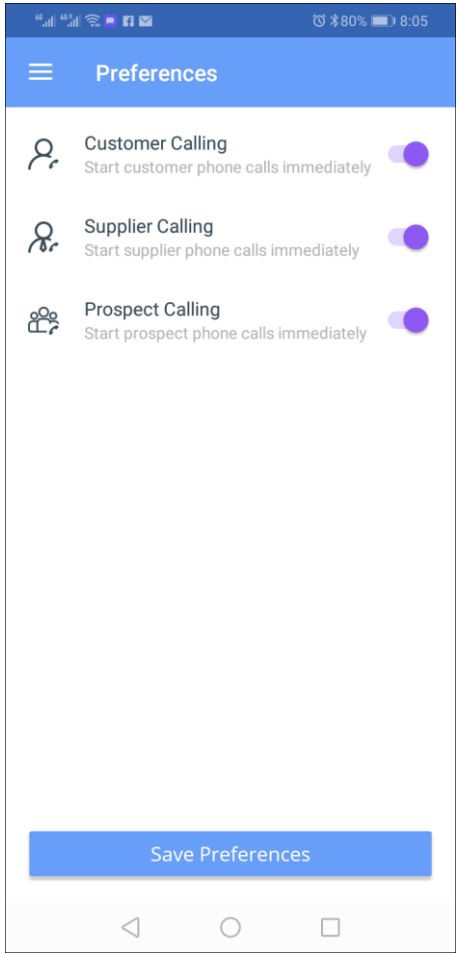
Setting the Calling Preferences



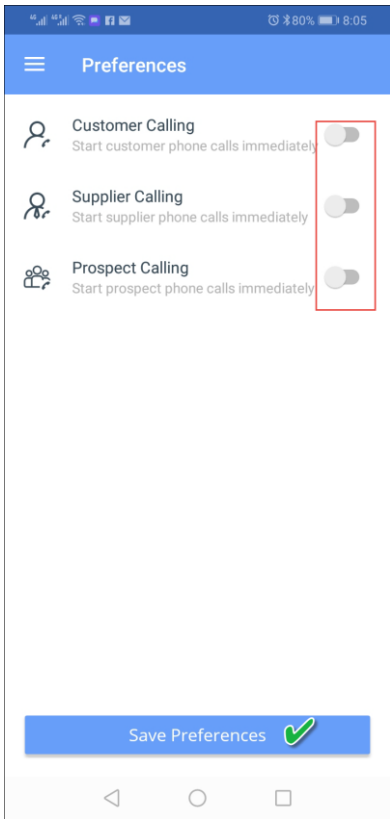
Setting the Calling Preferences



From the 'Settings' menu, the 'Preferences' option is tapped.



By default, the Customer, Supplier and Prospect calling options are activated, which means that the selected person or company will be called immediately when the call button is tapped.



However: By deactivating the setting for all three options and tapping 'Save Preferences', the dialer will be opened first when the call button is tapped on the person or company account, after which the call can be placed.



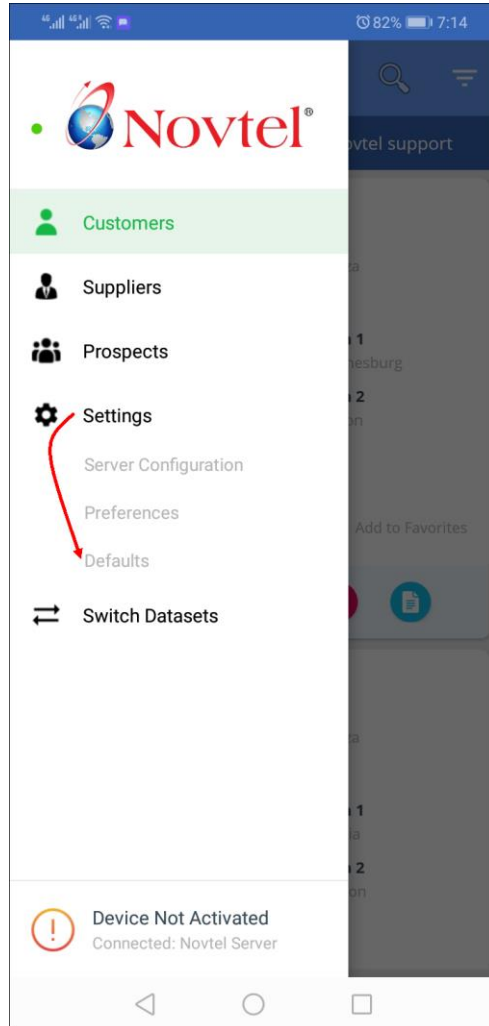
Relations Management Mobile App



Setting up the Default Settings

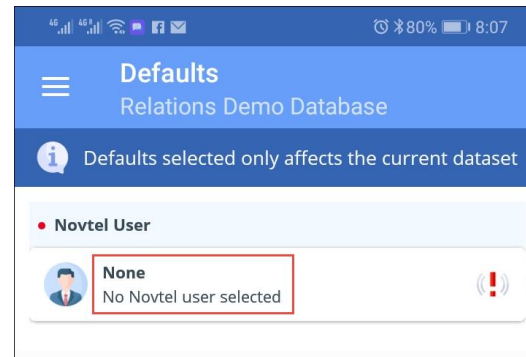


Setting Up the Default Settings



This once-off and mandatory step must be performed since a default User per device and per dataset must be selected for correspondence to be logged under this User's name.

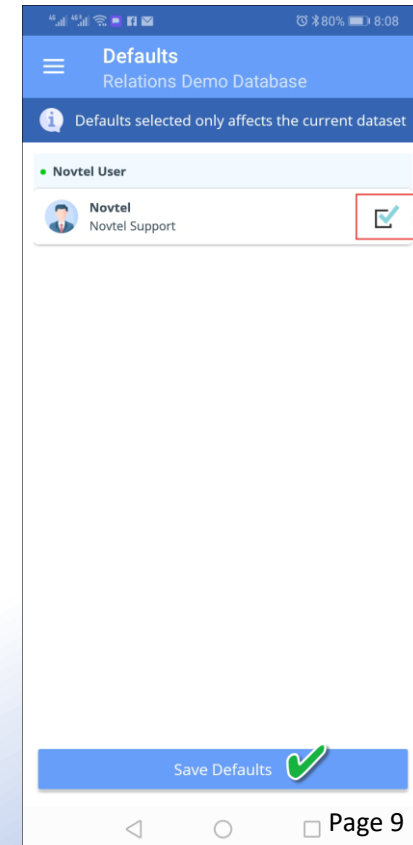
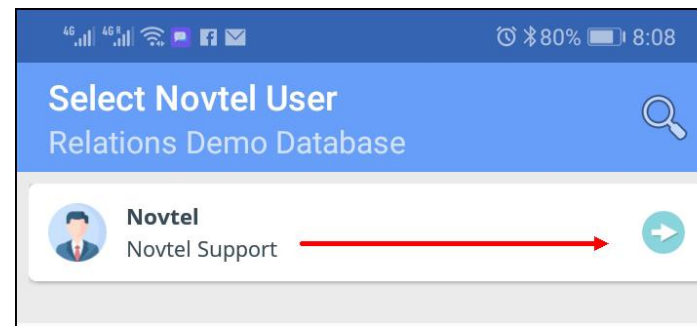
Tapping on the 'Settings – Defaults' option, it is indicated that no User is selected yet for this device and dataset.



By tapping here, all Users setup in the Desktop Application, will be listed and the correct User is to be selected.

The selected User will now be ticked, and the default is to be saved.

From now on, this User will be linked to all communication captured from this device.





Relations Management Mobile App

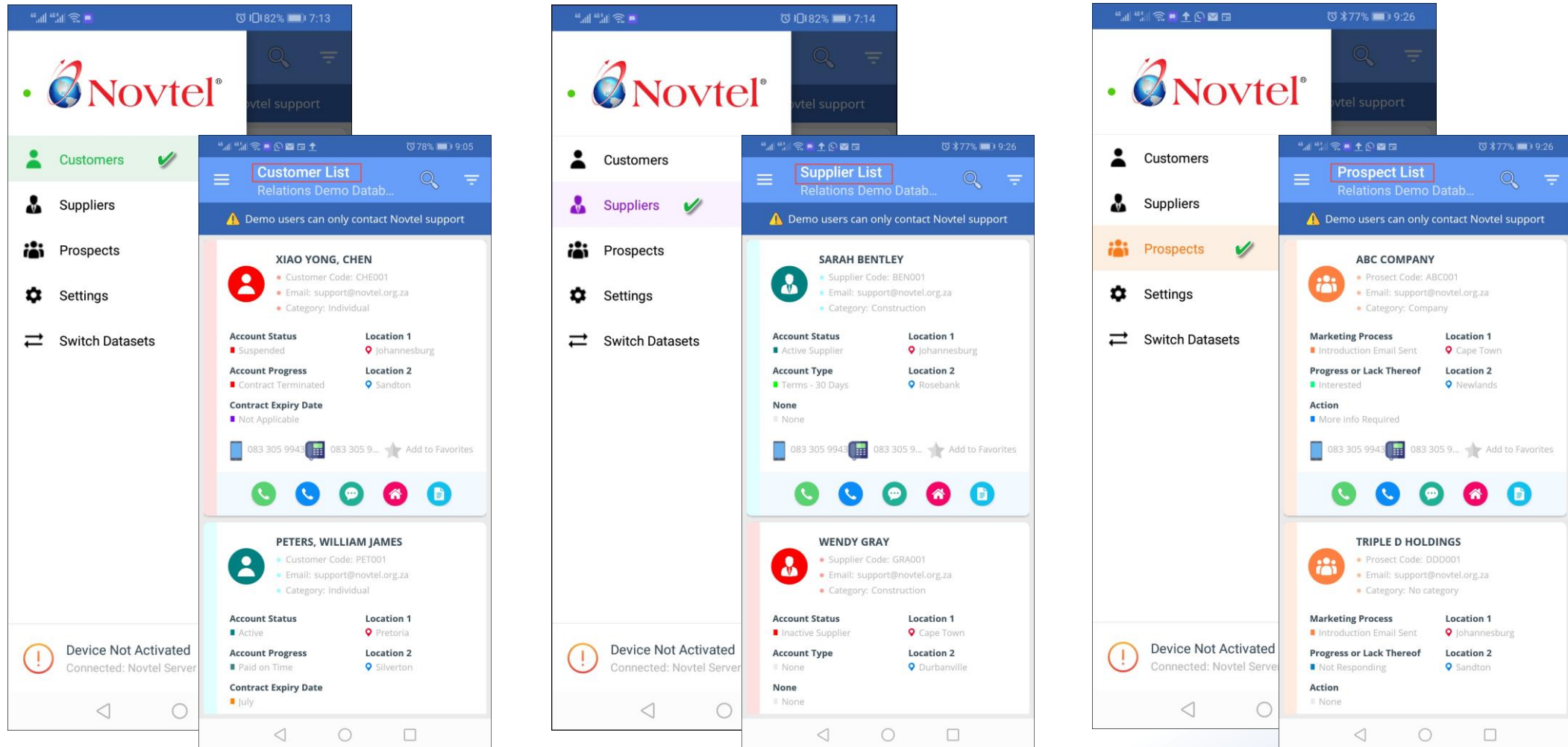


Customer, Supplier
and Prospect Accounts

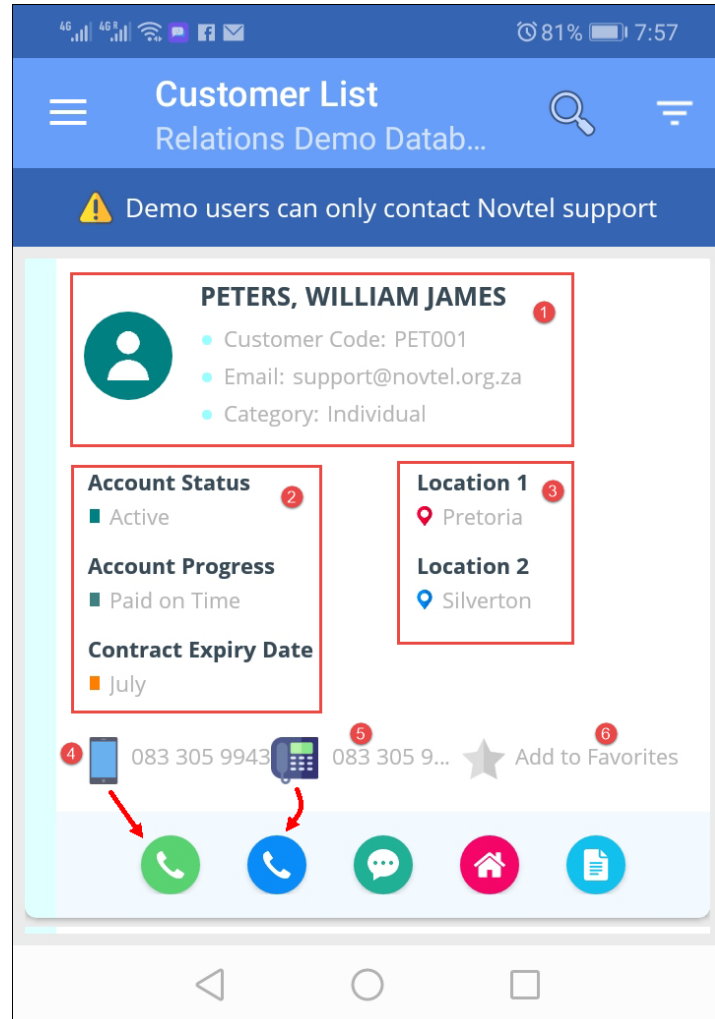


Customer, Supplier and Prospect Accounts

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

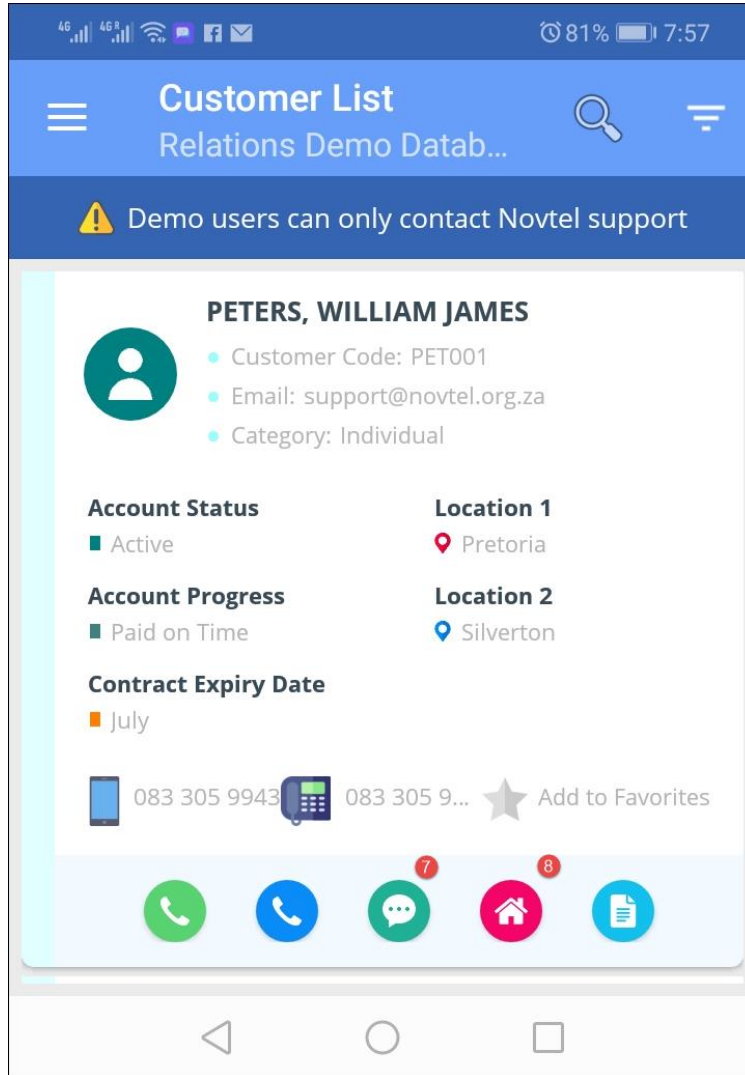


Customer, Supplier and Prospect Accounts



- 1 Per Account, the Description, Code, Email Address and Category it is linked to, is displayed as set up in the desktop application.
- 2 The main and sub-statuses linked per selected Account, are listed here.
- 3 The specific locations associated per Account, are captured here.
- 4 The Account's main cell number is listed here and can be dialed by clicking on the telephone displayed in a **green** background.
- 5 The Account's main landline number is listed here and can be dialed by clicking on the telephone displayed in a **blue** background.
- 6 An Account can be classified as a 'Favorite' and will always be displayed at the top of the contact list, and in alphabetical order.

Customer, Supplier and Prospect Accounts



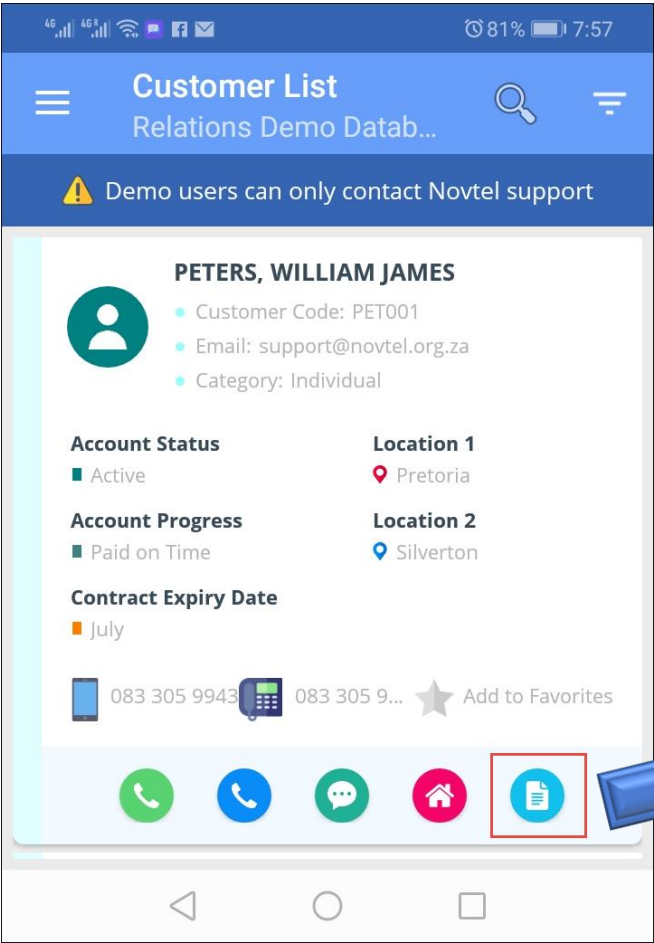
7 A WhatsApp message can be created and sent to the listed Cell number, by tapping the 'Message' icon.

8 Google Maps integration:

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

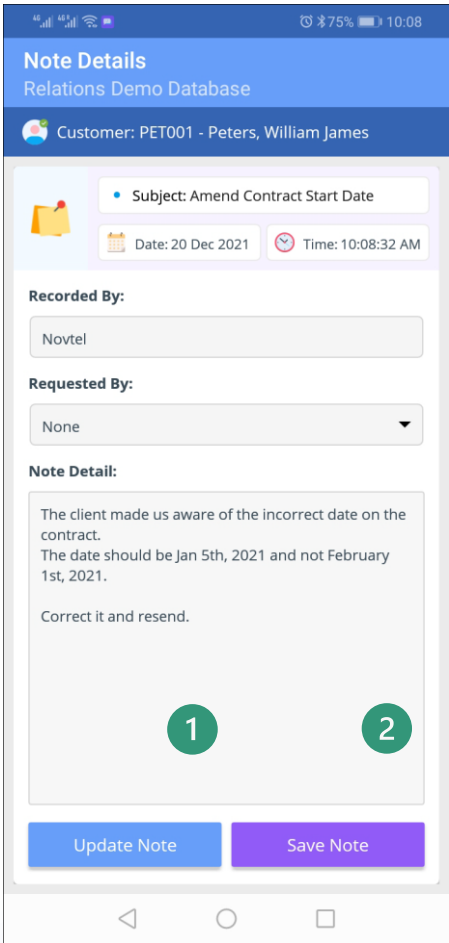
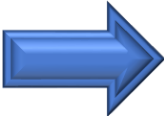
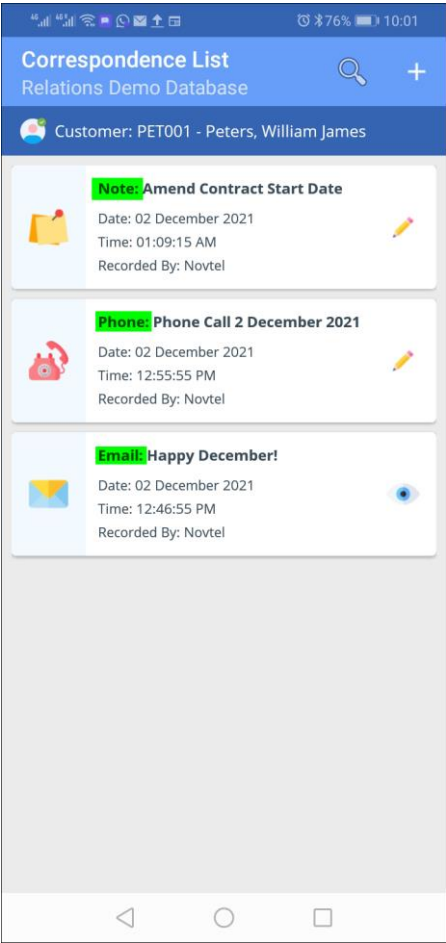
Simply tap on this icon to set a pin in Google maps.

Customer, Supplier and Prospect Accounts



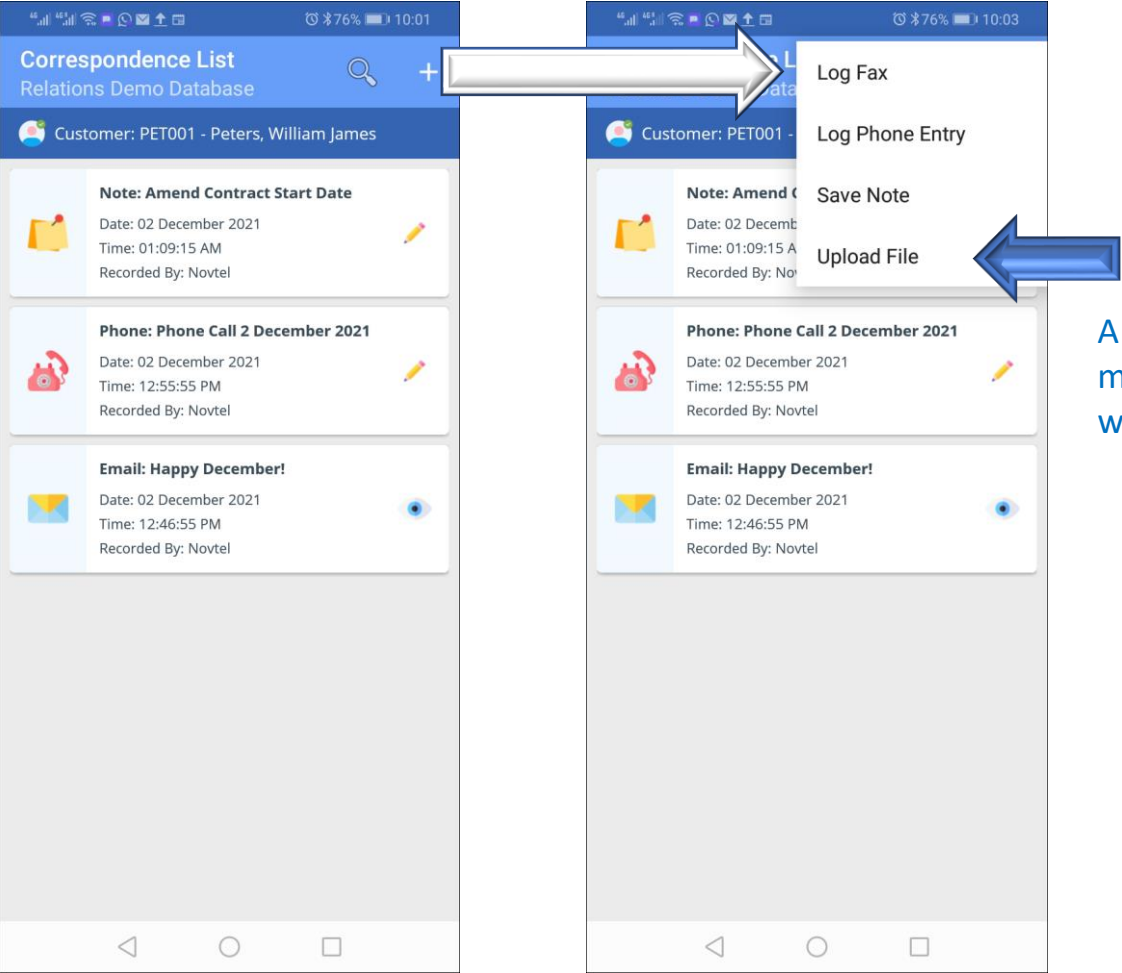
Tapping a correspondence item, the details will be displayed as captured.

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



Customer, Supplier and Prospect Accounts

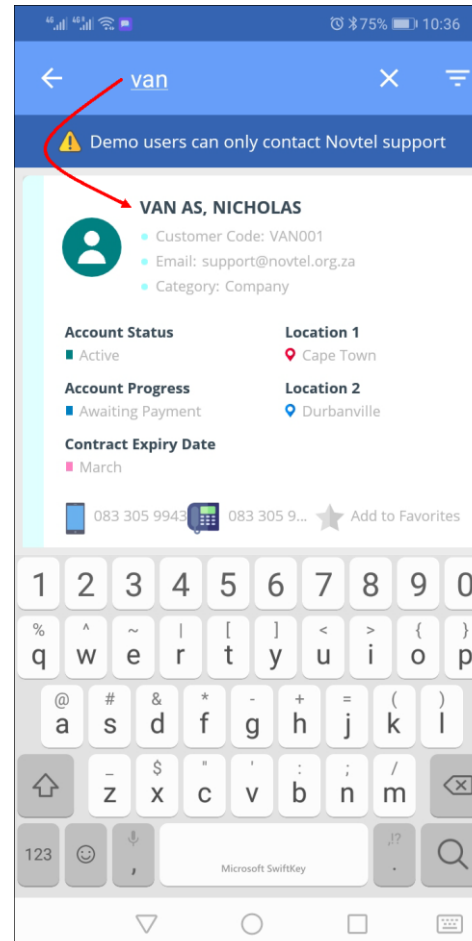
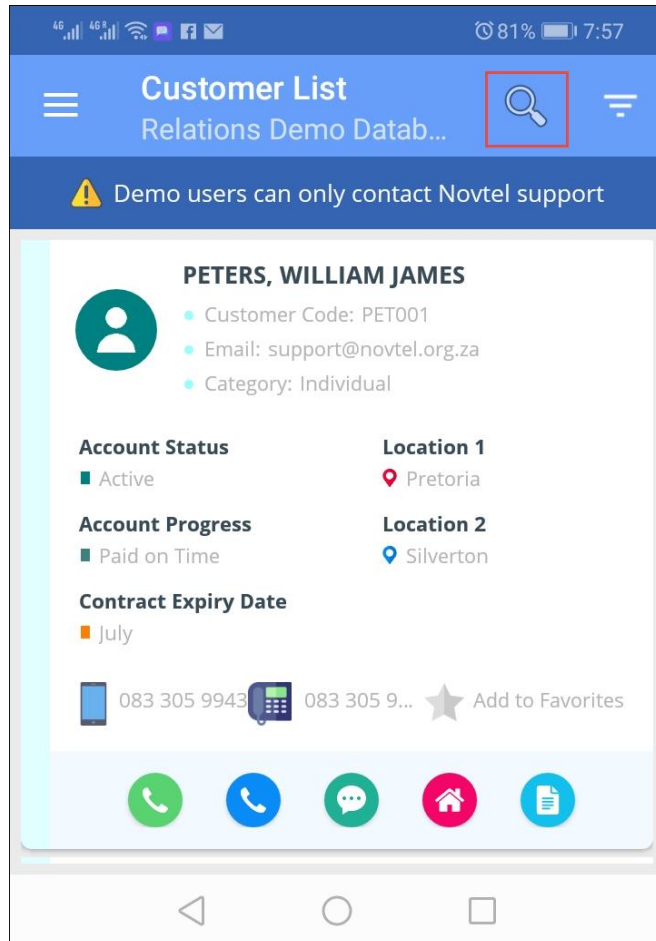
Tapping the '+' sign in the 'Correspondence List' window, a new fax, phone entry and note can be captured by selecting the relevant option.



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

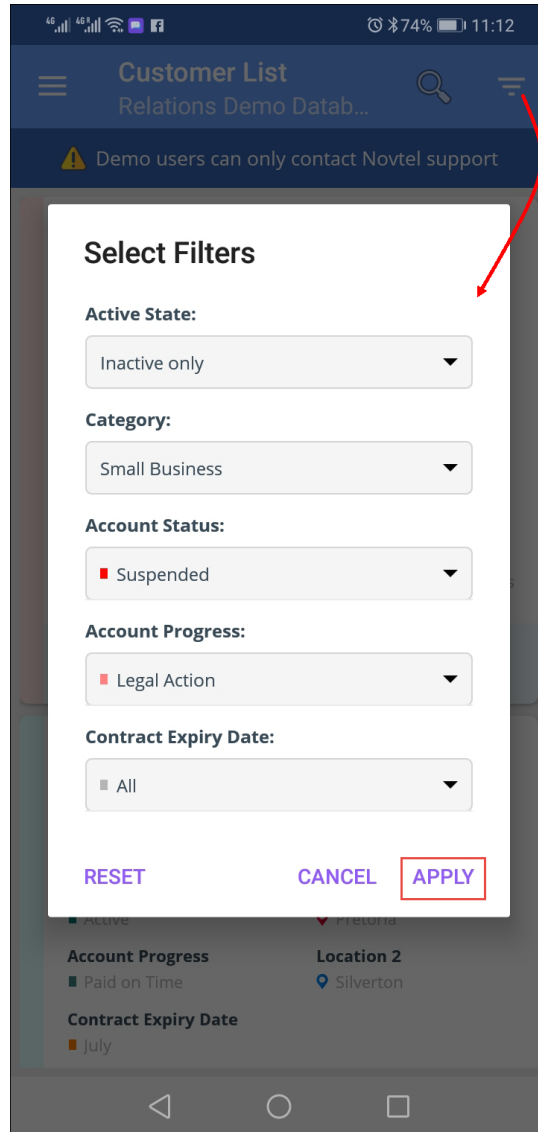
Searching for an Account

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



Either search for the Account Code or Description in the 'Search' field.

Searching for an Account



Accounts can also be filtered and grouped together according to:

➤ Active State:

- ✓ Active Accounts Only
- ✓ In-active Accounts Only
- ✓ All Accounts

➤ Category:

A specified Customer, Supplier or Prospect Category.

➤ Sub-Statuses:

A specified sub-status linked to a main status.

The search will be performed, and the matched criteria listed upon tapping 'Apply'.



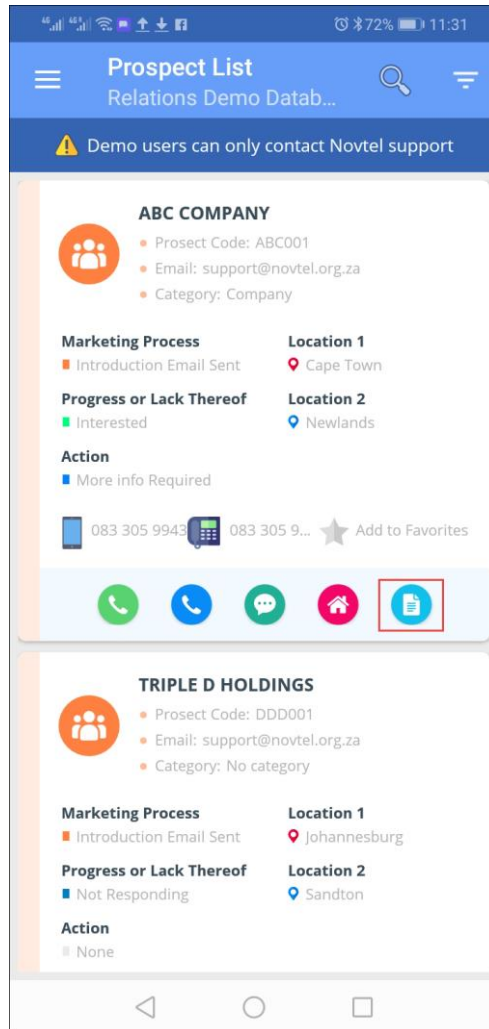
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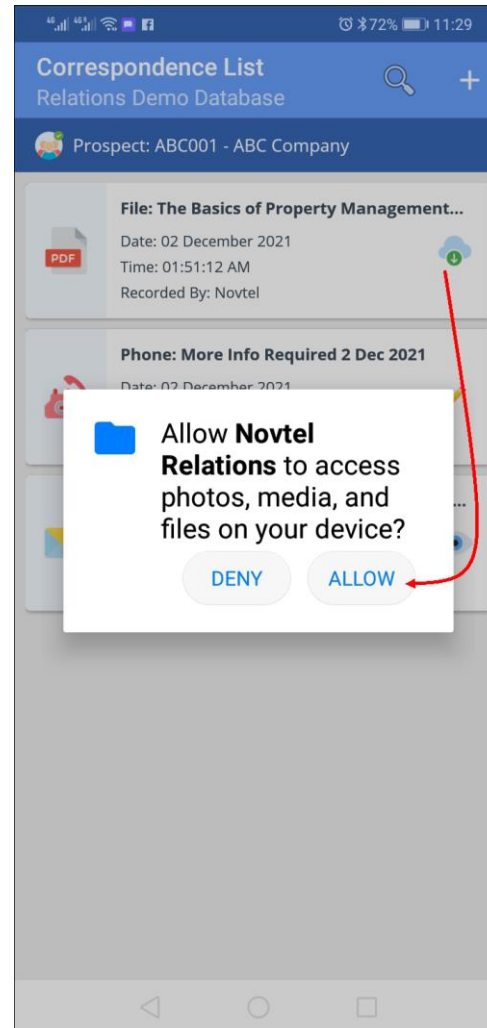
**Downloading and Viewing a
Document from the App**



Downloading and Viewing a Document From the App



A document can be viewed directly from the app by first tapping on the 'Document' icon from the required Account.

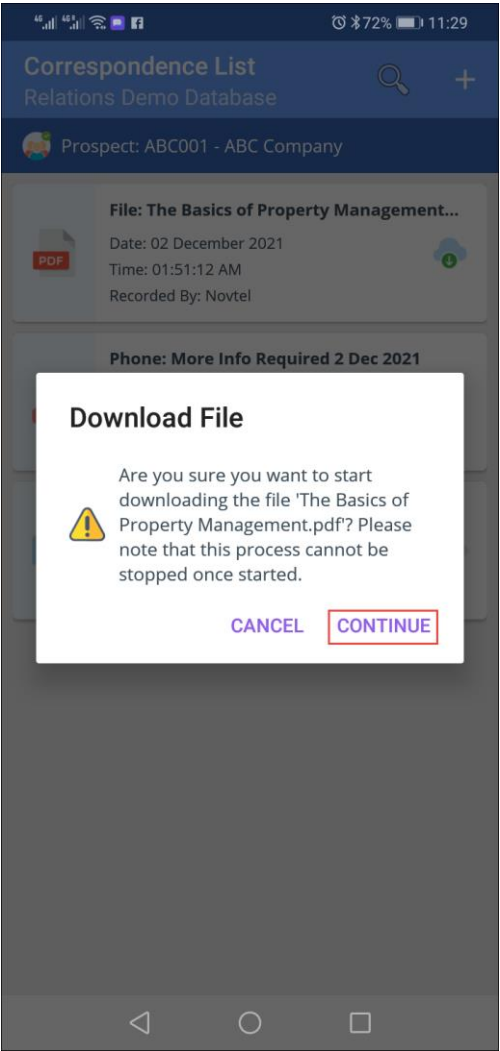


The document is now be tapped to be downloaded to the mobile device.

Only when the first document is downloaded, will permission be required to access the files on your device, and this action is to be approved.

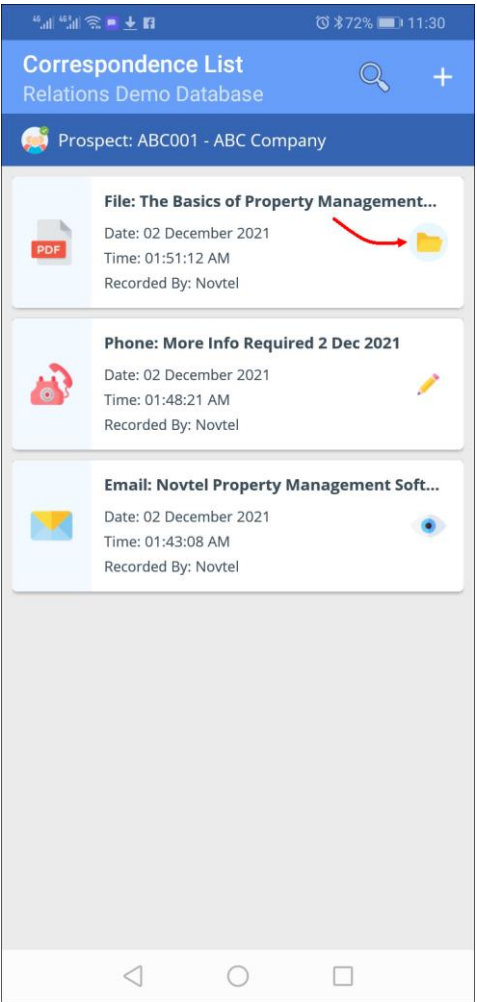
From now on, the communication will not appear again.

Downloading and Viewing a Document From the App



Tap 'Continue' to proceed with the downloading of the document.

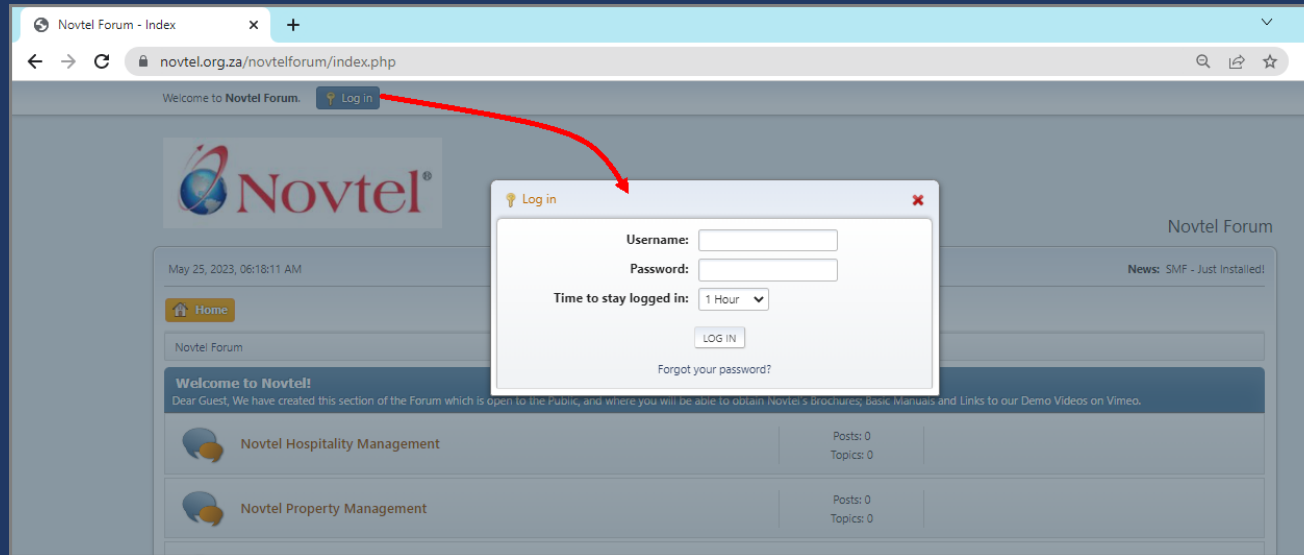
By tapping on the downloaded document, it will be opened.





NOVTEL FORUM LOGIN LINK

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



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



Property
Management



Hospitality
Management



Equipment Hire



Relations
Management



Self-Storage



Vehicle Hire



The Invoice Module
and Job Tracker Utility

(For the Glass Cutting Industry)



Contract
Management



Bank Manager



Access Control



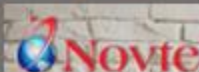
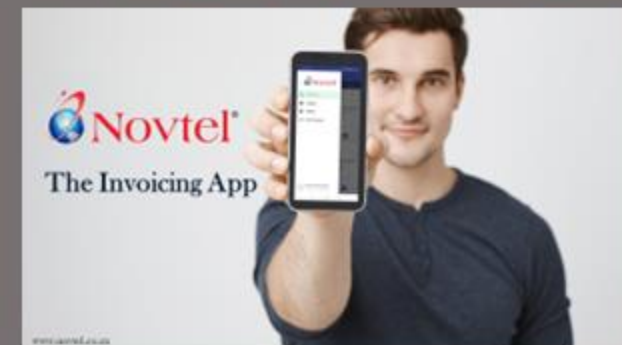
Property Management
Mobile Application



Relations Management
Mobile App



The Invoicing App



The Online
Application
Website



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