



STEPS TO  
**Mastering the Basics**

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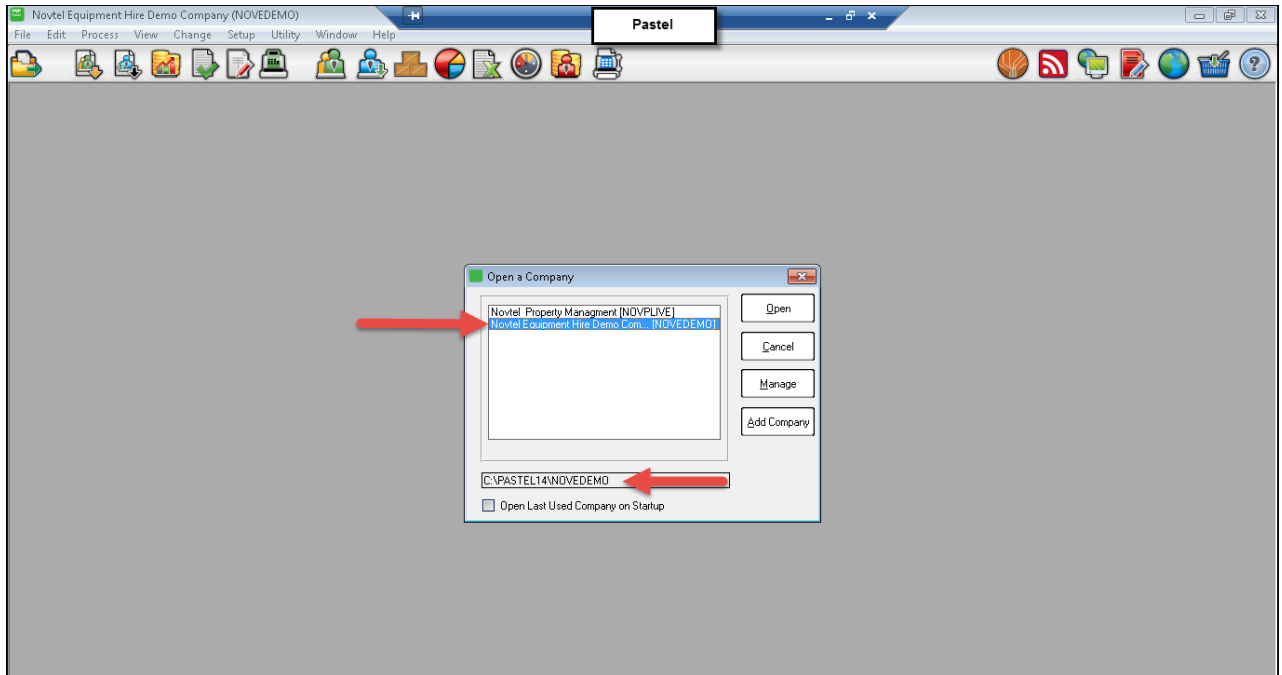
EQUIPMENT HIRE  
(CONTAINER HIRE)

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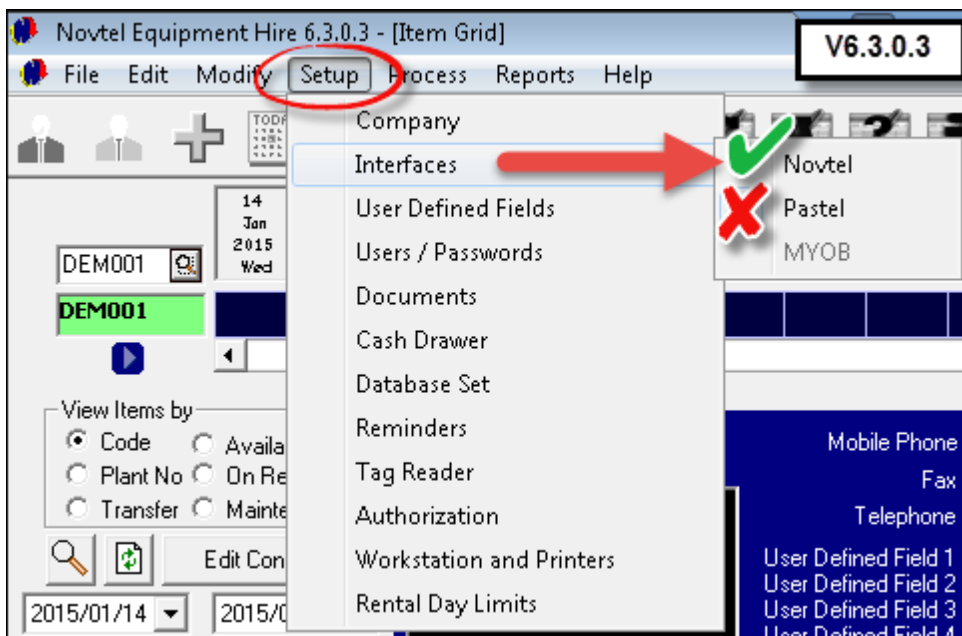
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# 1 Step 1 - Creating Users and Passwords

Please make sure that Novtel Equipment Hire is linked to a Pastel Company if interfaced with Pastel. The system will not allow you to add a User if the linking was not done first

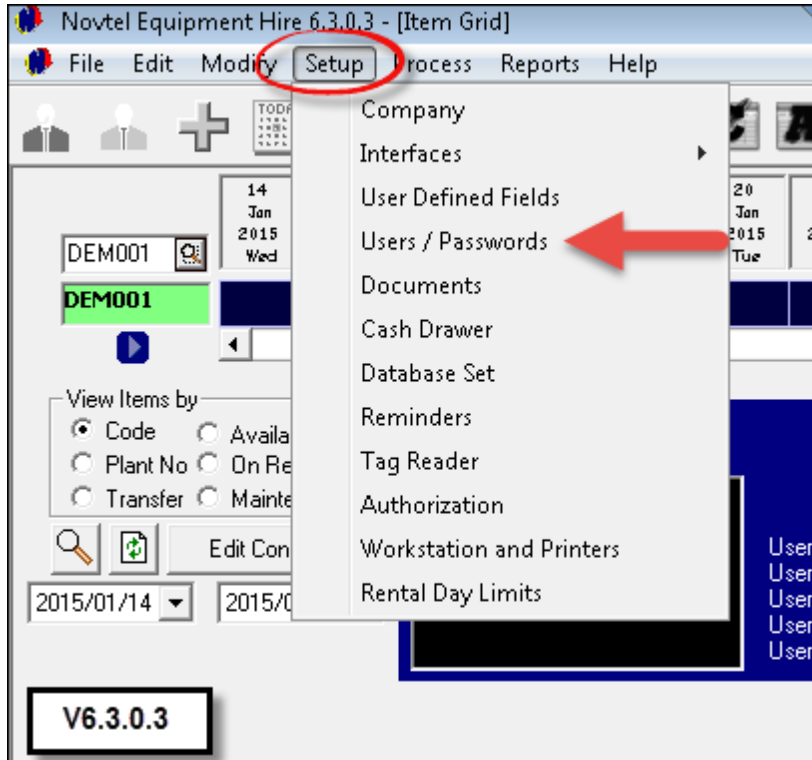


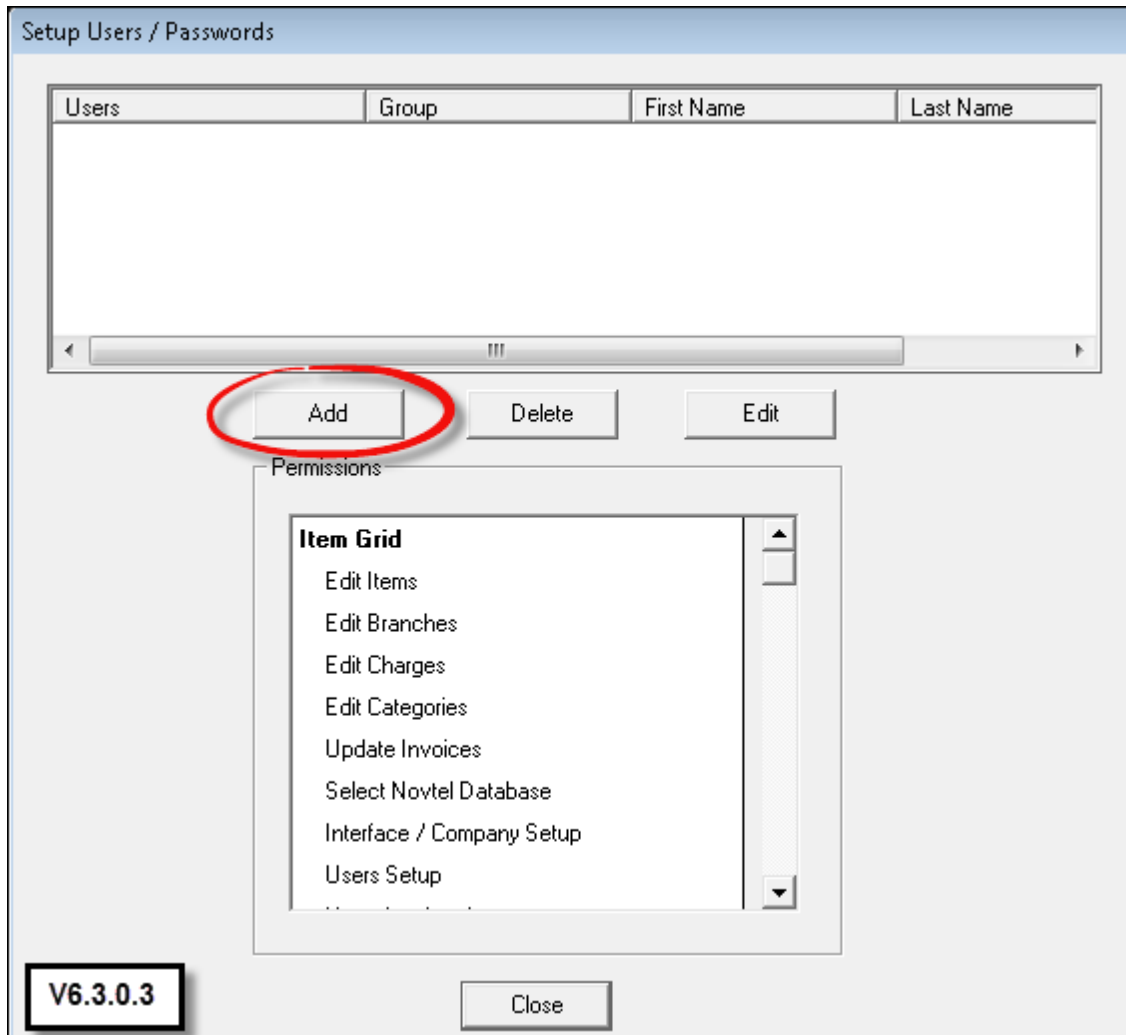
At this stage, also make sure that the Pastel Interface in Novtel is off - Click on "Setup - Interface - Novtel"



In order to get started with Novtel Equipment Hire, "Users" must be created. The first "User" created, will always be the "Administrator" with full rights to the system. "Users" can also be linked to different "Branches" according to where they are employed

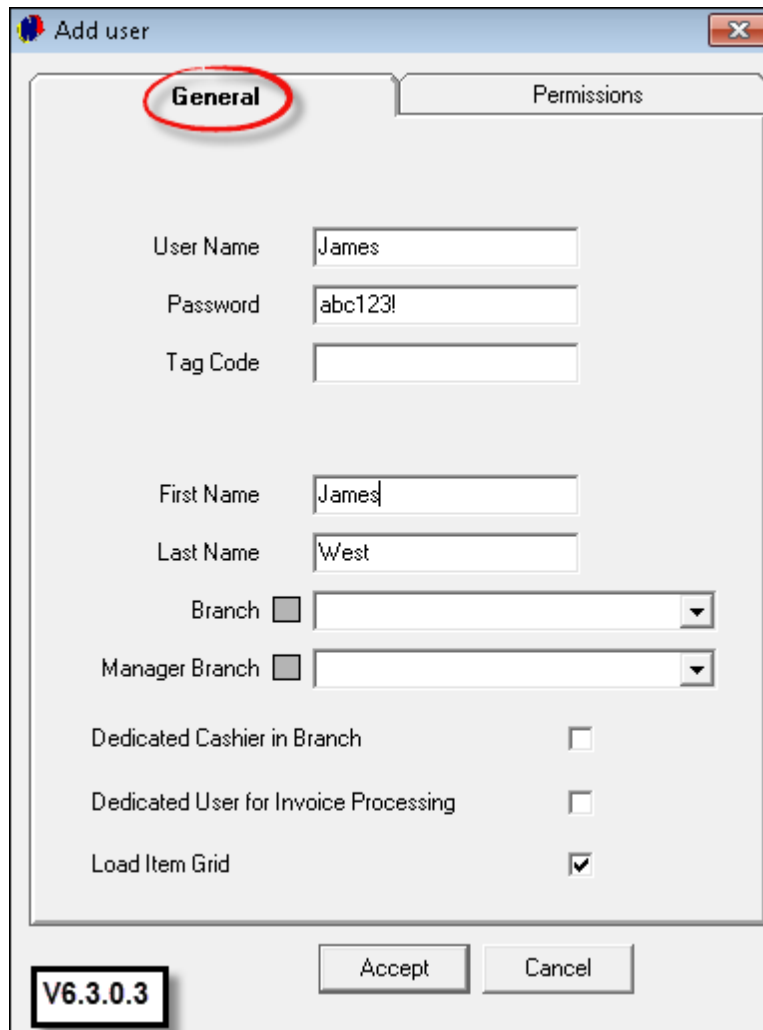
- Click on "Setup - Users / Passwords", and then "Add"





In the "General" tab, enter the following:

- User Name
- Password
- Should "Access Control" be used, enter the "Tag Code" that will serve as a "key" for access to the facility
- The First and Last Name of the "User"
- "Creating Branches" are explained in Step 4, and you will need to return to each "User" to connect them to a "Branch" - when you have created it
- Tick the check-boxes if the "User" is this branch's dedicated Cashier and Invoice Processor
- Select the "Load Item Grid" option

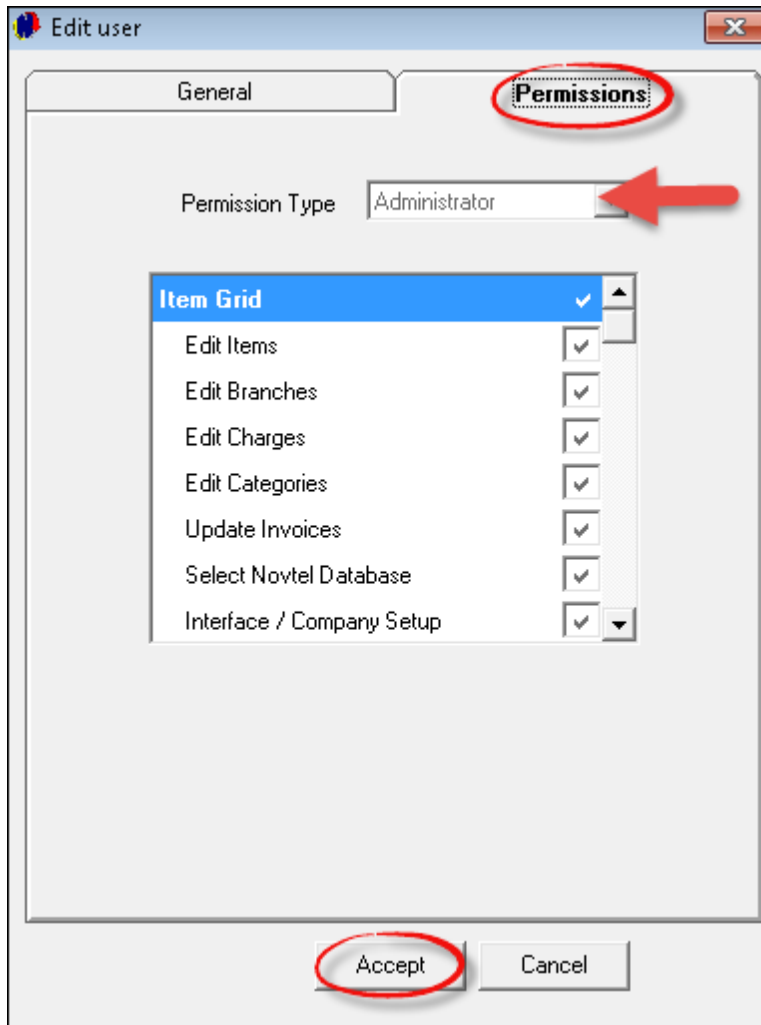


The screenshot shows a software window titled "Add user" with two tabs: "General" and "Permissions". The "General" tab is active and highlighted with a red circle. The form contains the following fields and options:

- User Name:
- Password:
- Tag Code:
- First Name:
- Last Name:
- Branch:
- Manager Branch:
- Dedicated Cashier in Branch:
- Dedicated User for Invoice Processing:
- Load Item Grid:

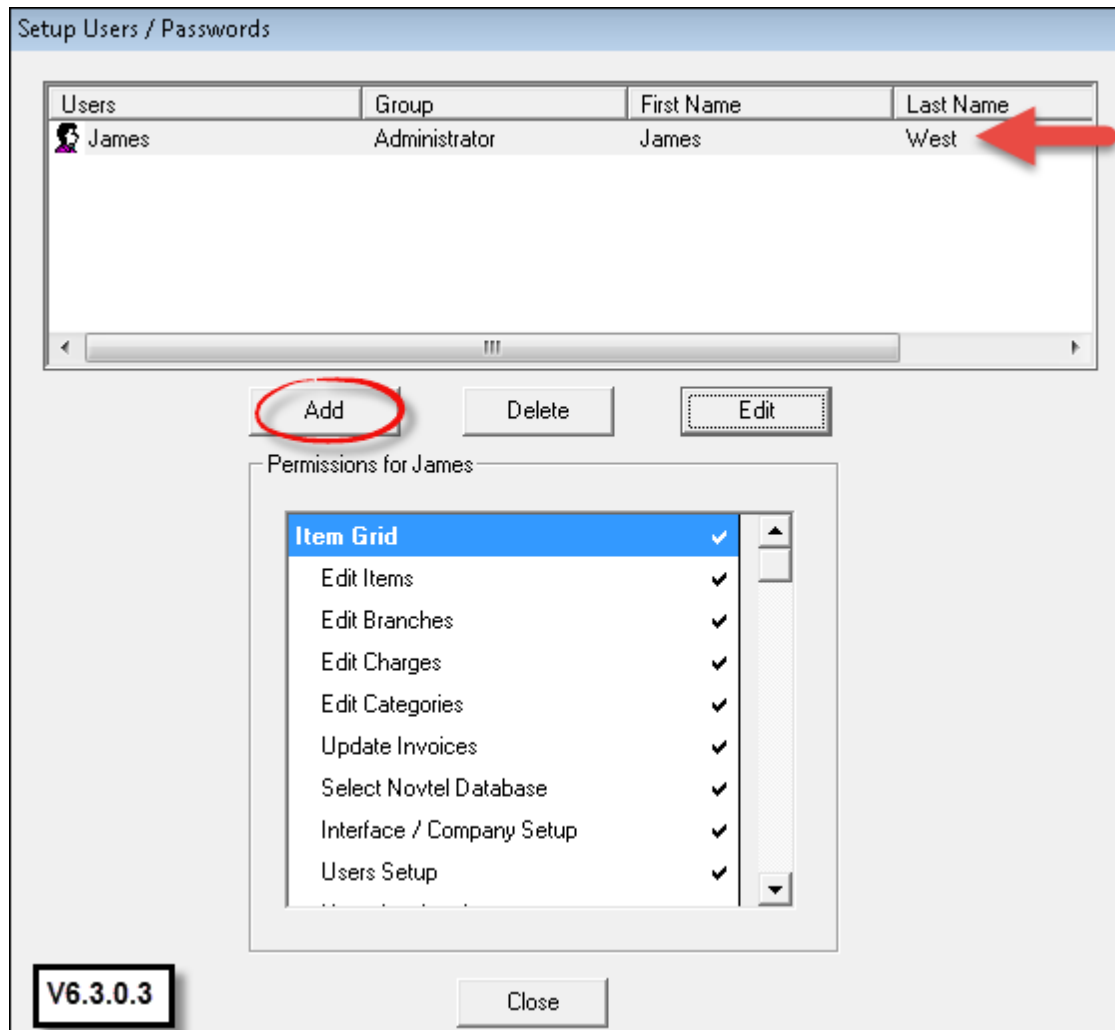
At the bottom of the dialog, there are "Accept" and "Cancel" buttons. A version number "V6.3.0.3" is displayed in a box in the bottom-left corner.

- In the "**Permissions**" tab, you will notice that the "**Permission Type**" for the first user is "**Administrator**", and cannot be edited - therefore it is very important that the appropriate person is created as the "**Administrator**"



- Click "**Accept**"

- James now displays as the first "User" in the top part of the window. In order to create the next "User", simply click "Add"





- Enter all details for this "User" in the "General" tab - In this case it is Shawn - and proceed to the "Permissions" tab. Shawn will be working in the "Shop", and this must be selected for his "Permission Type". Click "Accept" to save this profile

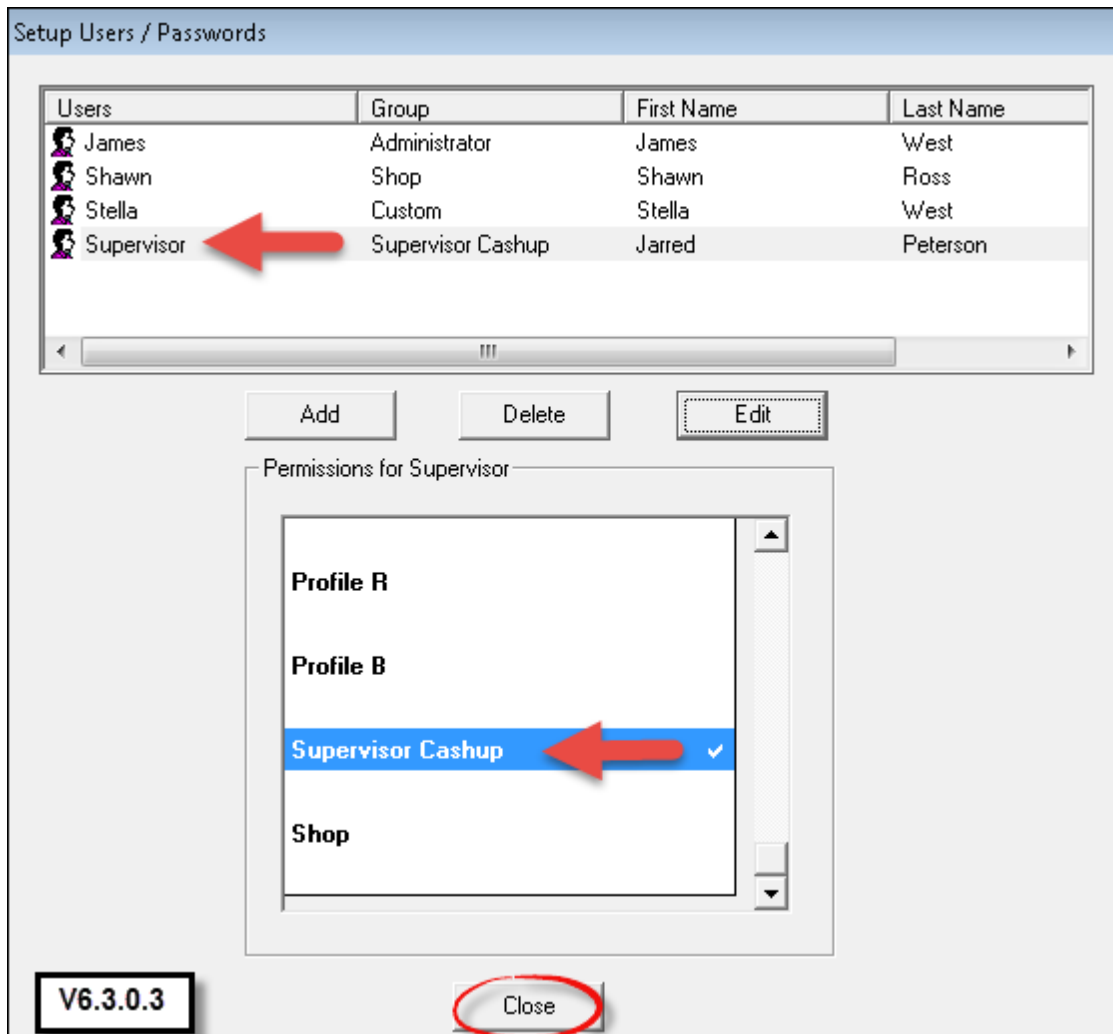
The screenshot shows the 'Add user' dialog box with the 'Permissions' tab selected. The 'Permission Type' dropdown menu is open, displaying the following options: Administrator, Shop (highlighted with a red arrow), Supervisor Cashup, and Custom. Below this, there are three more dropdown menus: 'Profile R', 'Profile B', and 'Supervisor Cashup'. At the bottom of the dialog, the 'Accept' button is circled in red, and the 'Cancel' button is visible to its right. A version number 'V6.3.0.3' is displayed in the bottom left corner.

- If you want certain "Users" to have selected "Permissions" only, choose "Custom" for the "Permission Type", and un-tick the permissions that the "User" do not have access to

The screenshot shows the 'Add user' dialog box with the 'Permissions' tab selected. The 'Permission Type' is set to 'Custom'. The 'Accept' button is circled in red. Red arrows point to the 'Custom' dropdown and the checkboxes for 'Edit Charges' and 'Select Novtel Database'.

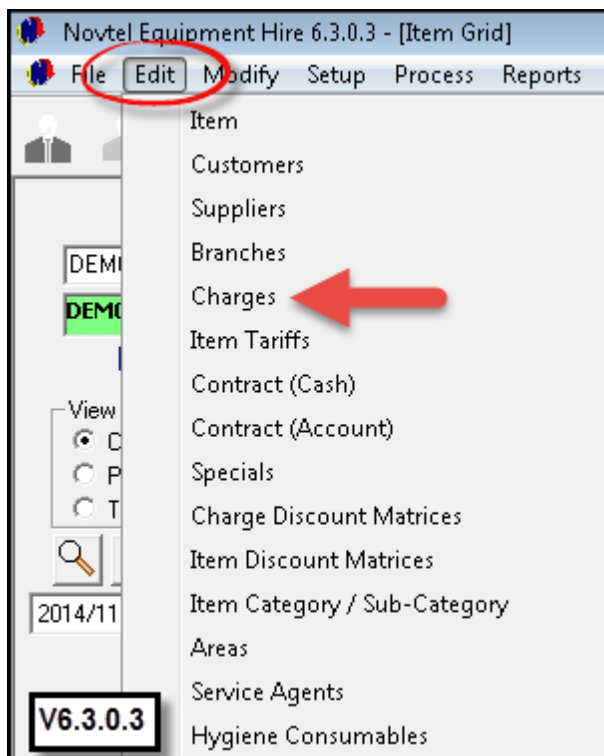
Permission	Checked
Edit Items	<input checked="" type="checkbox"/>
Edit Branches	<input checked="" type="checkbox"/>
Edit Charges	<input type="checkbox"/>
Edit Categories	<input type="checkbox"/>
Update Invoices	<input checked="" type="checkbox"/>
Select Novtel Database	<input type="checkbox"/>
Interface / Company Setup	<input type="checkbox"/>
Users Setup	<input checked="" type="checkbox"/>

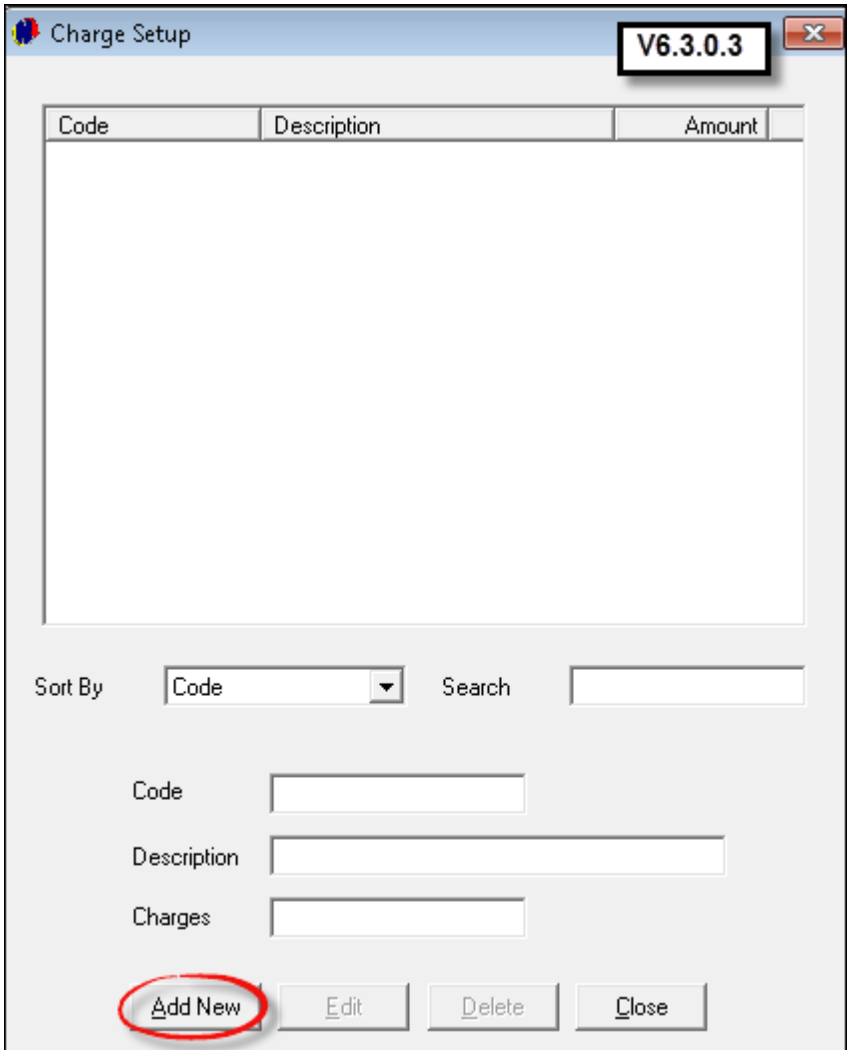
- Set up a "Supervisor" for each "Branch" as well, and click "Close" when you are done



## 2 Step 2 - Creating Charges

- Please make sure that if Pastel is used, the interface has been done in "**Setup - Interfaces - Pastel**", and that the "**Company Path**" is correct
- Before we can set up the Company Details; Create "**Customers**" and "**Branches**", there are certain charges that must be created first, in order to insert it in "**Setup - Company - POS**" tab, and we will code it as follows:
  - WOR001 - Workshop Charge
  - POS001 - POS/Shop In-house Charge
  - POS002 - POS/Shop In-house Payout Charge
  - LAT001 - Late Return Charge
  - REP001 - Replacement Charge
  - REP002 - Repair Charge
  - HYG001 - Hygiene Service Charge (This is used for "Toilet Hire", but the system requires this charge code)
- Click on "**Edit - Charges**" and then "**Add New**"





- Enter the "**Code**" for the first charge, and then the "**Description**". Novtel uses a 3 letter alpha code, in conjunction with a 3 digit numeric code. For example: POS001
- In order for the item to be created in Pastel as well, tick the corresponding check-box. If this option is not selected, then you will have to create each charge manually in Pastel, and link it in Novtel
- Tick the check-box to "**Display on Invoice**" if you want to utilize this option
- A "**Physical Item**" is something tangible that can be handled and sold. The check-box for this option must be left blank in this case
- In the "**General**" tab, tick the check-box to "**Allow Tax**", and set the default Tax percentage
- Leave the prices blank, since charges will vary and the appropriate price can be entered manually when the charge is selected. When creating charges that requires a cost price and selling price, you can simply enter these rates as follow: The "**Rate Incl**" is the selling price including Tax to the customer. When the "**Cost Price Excluding**" tax is entered, the system will automatically calculate the "**Markup %**" as well as the "**Charge Excluding**" tax

- The "**Pastel Inventory Code**" will be created when the "**Import**" is done
- Should you make use of "Multi- Stores", the "**Store**" can be selected by clicking on the magnifying glass and browsing for it
- The charge can be linked to an "**Inventory Category**". The setup is done in Pastel: "**Edit - Inventory - Categories**". After the "**Categories**" have been set up, you need to select "**Modify - Update Inventory Categories**" in Novtel, in order to import those Pastel created "**Categories**" to Novtel

- In the "Properties" tab, select the type of item the charge represents. We have selected "POS/Shop Inhouse Charge"
- Click "Accept" to save the charge

The screenshot shows a software window titled "Add New Charge". At the top, there are input fields for "Code" (POS001), "Description" (POS/Shop In-house Charge), "Barcode", and "External Reference". To the right of these fields are checkboxes for "Create Item In Pastel" (checked), "Display On Invoice" (checked), "Physical Item" (unchecked), and "Blocked" (unchecked). Below this is a tabbed interface with "General" and "Properties" tabs. The "Properties" tab is selected and circled in red. Inside the "Properties" tab, there is a list of item types with checkboxes: "POS Item" (checked and circled in red), "Shop Item", "Payout Item", "Refundable Charge Item", and "Maintenance Item". To the right of this list is a "POS Category:" search field with a magnifying glass icon and a "Clear" button. Below the tabs are fields for "Pastel Inventory Code", "Multi Store code for retrieving Cost Price", and "Inventory Category" (set to "000 - No category"). At the bottom left, a box contains the version number "V6.3.0.3". At the bottom right, there are "Accept" and "Cancel" buttons, with the "Accept" button circled in red.

- In order to import the item to Pastel, select "**Services**" for the "**Inventory Group**", and then "**Service Item**"
- Click "**Accept**" to complete the import

Import Inventory Item

Code: POS001

Description: POS/Shop In-house Charge

Inventory Group: 001 - Services

Excl Selling Price: 0.00

Physical Item

Service Item

Code	Description
<input checked="" type="checkbox"/> 001	Default Store

Multi-Store Select

All Multi-Stores

Selected Multi-Stores

V6.3.0.3

Accept

Cancel



- Now when we return to the charge created, the "Pastel Inventory Code" has been created and linked to the Novtel charge

**Edit Charge**

Code: POS001

Description: POS/Shop In-house Charge

Barcode:

External Reference:

Display On Invoice

Physical Item

Blocked

---

**General** | Properties

Allow Tax  1 - Vat - Standard rated (14%)

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:

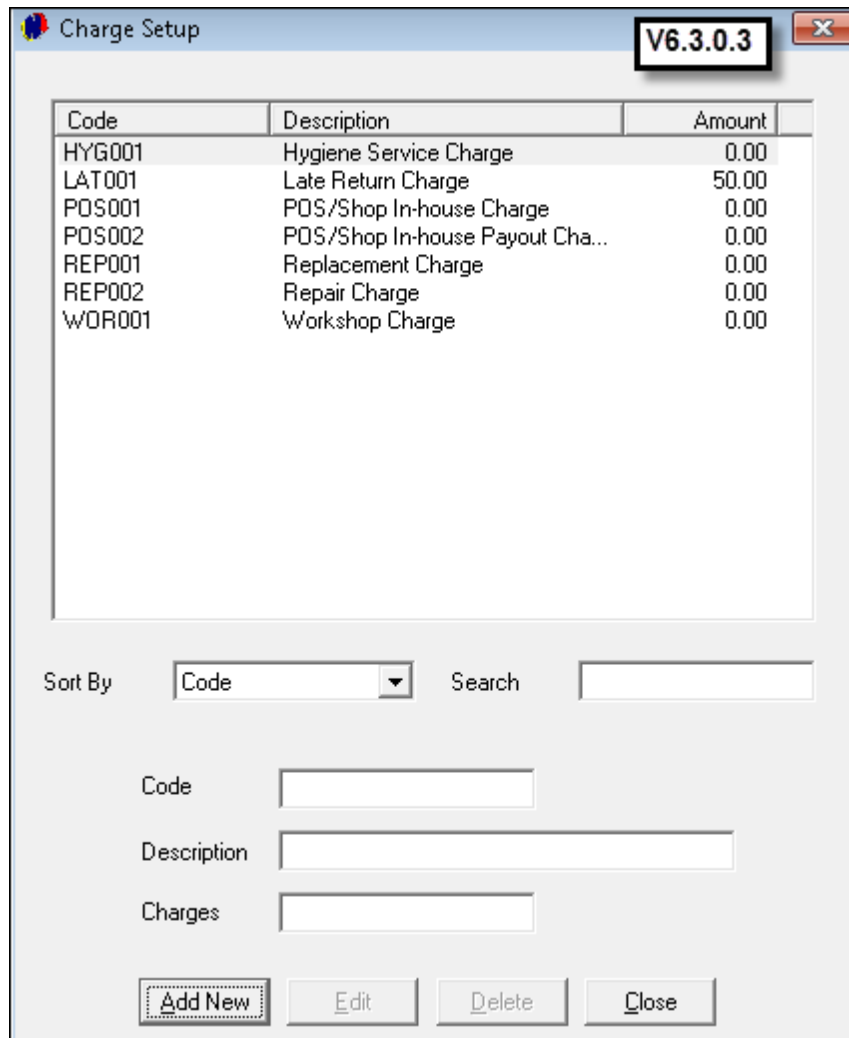
Pastel Inventory Code: POS001 POS/Shop In-house Charge

Multi Store code for retrieving Cost Price:

Inventory Category: 000 - No category

**V6.3.0.3** | Accept | Cancel

- Create all the other charges as mentioned before, by repeating the process



The screenshot shows a software window titled "Charge Setup" with a version indicator "V6.3.0.3" in the top right corner. The window contains a table with three columns: "Code", "Description", and "Amount". Below the table, there are controls for sorting and searching, and three input fields for "Code", "Description", and "Charges". At the bottom, there are four buttons: "Add New", "Edit", "Delete", and "Close".

Code	Description	Amount
HYG001	Hygiene Service Charge	0.00
LAT001	Late Return Charge	50.00
POS001	POS/Shop In-house Charge	0.00
POS002	POS/Shop In-house Payout Cha...	0.00
REP001	Replacement Charge	0.00
REP002	Repair Charge	0.00
WOR001	Workshop Charge	0.00

Sort By: Code Search:

Code:

Description:

Charges:

Buttons: Add New, Edit, Delete, Close

- Other charges to be created, include:
  - Delivery to Site
  - Any item that will be sold in the shop - if applicable - and select "POS Item" and "Shop Item" in the "Properties" tab when the charge is created. These items will then be imported to Pastel as "Physical Items"

The screenshot shows the 'Add New Charge' dialog box with the following fields and options:

- Code: [Text Field]
- Description: [Text Field]
- Barcode: [Text Field]
- External Reference: [Text Field]
- Create Item In Pastel
- Display On Invoice
- Physical Item (circled in red)
- Blocked

The 'Properties' tab is selected and circled in red. It contains:

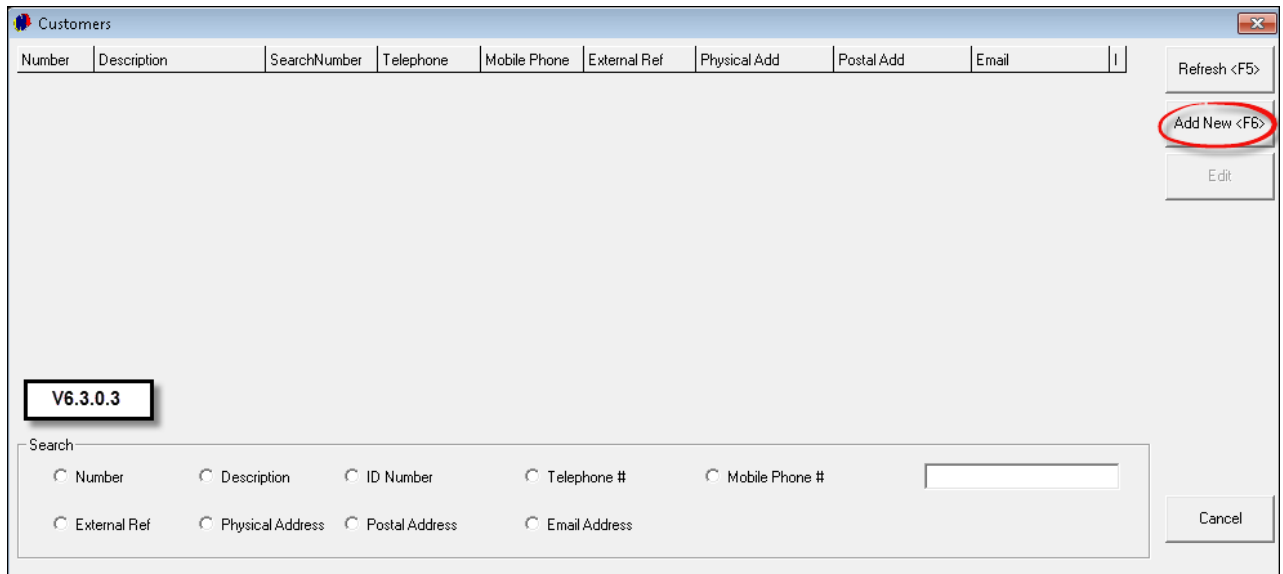
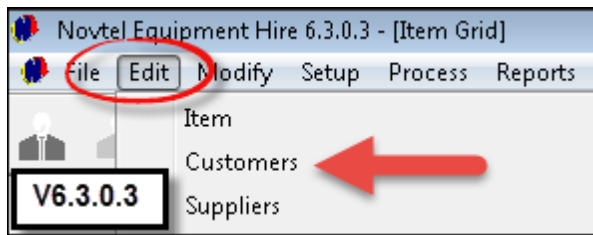
- POS Item (circled in red)
- Shop Item (circled in red)
- Payout Item
- Refundable Charge Item
- Maintenance Item
- POS Category: [Text Field]
- [Clear] button

At the bottom of the dialog:

- Pastel Inventory Code: [Text Field]
- Multi Store code for retrieving Cost Price: [Text Field]
- Inventory Category: [Dropdown Menu] (000 - No category)
- V6.3.0.3 (highlighted in a box)
- Accept button
- Cancel button

### 3 Step 3 - Creating Customers

- Click on "Edit - Customers" and then "Add New"



1. Tick the check-box for "**Corporate Customers**" when it is a Company. This tick is significant, because when contracts are created, either a "**Cash Contract**" or "**Account Contract**" can be selected. When this check-box is ticked, only "**Corporate Customers**" will appear in the window for "**Account Contracts**". The rest will automatically be "**Cash Customers**".
2. Very Important - Tick the check-box for "**Monthly Container Hire**"
3. If an "**Order Number**" is required for this "**Customer**", select this option
4. Select the "**Billing Interval**" by clicking on the arrow, and selecting one of the following: On Month End / On 25th Day / On 28th Day / No Month End
5. You do not need to enter any "**Code**" or "**Description**" for Customer, since the system will automatically enter the "**Description**" for the Customer when you enter their Last Name and First Name for Private Customers; or the Company Name for "**Corporate Customers**"

If all "**Mandatory Fields**" are not entered, the system will not allow you to move to the next tab. The fields are marked with a \*

1. In the "**General**" Tab, enter the Postal and Physical Addresses
  2. Make sure that you enter the correct ID number for this Customer, and tick the check-box for "**RSA ID**". Novtel Equipment Hire incorporates an "ID Checker" program that will instantly alert you whether the ID number entered, is "**False**" (In Red Letters), or "**Valid**" (In Green Letters). **Please Note that no contacts can be created if the ID is "False"**
  3. The "**Date of birth**" will be inserted automatically by the system when the ID is entered
  4. Enter the following:
    - Company Registration Number
    - Telephone Number
    - Fax Number
    - Mobile Number
    - E-Mail Address
    - Contact Person
- A picture of the Customer can be taken via the web-cam, by clicking "**Start Camera**"
- Also remember to set the "**Credit Limit**" for the Customer. For "**Corporate Customers**" the limit may be high, since they will sometimes rent more than one Container at a time for different "**Sites**", and will have "**Payment Terms**" of 30, 60 or 90 days, and that limit will have to accommodate those monthly amounts - without being blocked by the system

Add New Customer V6.3.0.3

Account Code   Corporate Customer  
 External Account Ref   Monthly Container Hire  
 Description \* Jordan Construction  Order Number Required  
 Customer Category 00 - No category  Use Item Tariff Prices  
 Billing Interval On Month End 0

**General** Site Details Contract Details User Defined Fields Private Customer

Postal Address \* PO Box 7777777  
 Mossel Bay  
 6500

Physical Address \* 24 West Street  
 Mossel Bay  
 6500

Copy Postal Address to Physical

Tax Reference

Credit Limit 0

Notes

\* Required Fields

Company Name Jordan Construction  
 Last Name \* Mike  
 First Name \* Jordan  
 Title Mr Initials \* JJ  
 Date of Birth 1965/02/28 / F M  
 ID Number \* 6502280048258 RSA ID   
 False

Copy To Description

Company Reg No 123654789  
 Telephone No \* 044 999 888 777  
 Fax No 044 999 888 777  
 Mobile Phone \* 081 999 888 777  
 AH Telephone  
 Email Address jordan@construction.co.za  
 Search Number  
 Contact Person \* Mike

Block Customer Account

Start Camera

Account Balance	On Rent Total	Total Due	Available Credit
0.00	0.00	0.00	0.00

Provisional Customer Statement Pastel Customer Statement Accept Cancel

- When you click on "Site Details" Tab, see how the system now entered the "Account Code" automatically
- The "Physical Address" of the Customer is entered as the "Site". We will show you how to add a site when contracts are created

Account Code: J00001

External Account Ref: [Empty]

Description \*: Jordan Construction

Customer Category: 00 - No category

Corporate Customer:

Monthly Container Hire:

Order Number Required:

Use Item Tariff Prices:

Billing Interval: On Month End | 0

ID	Site	Contact	Mobile	Site #
J00001/001	24 West Street		081 999 888 777	001

Buttons: Add, Edit, Delete

Summary: Account Balance: 0.00, On Rent Total: 0.00, Total Due: 0.00, Available Credit: 0.00

Buttons: Provisional Customer Statement, Pastel Customer Statement, Accept, Cancel

1. There are no "Contract Details" yet for this "Customer", but for future reference, all contracts pertaining to this Customer can be viewed in this tab
2. In order to create specific "User Defined Fields" where details can be entered in the "User Defined Fields" tab of the "Customer", click on "Setup - User Defined Fields"
3. The "Private Customer" tab, contains the person's details that have been entered in the "General" tab
4. Click "Accept" to save the details in all the tabs

Account Code: J00001

External Account Ref: [Empty]

Description \*: Jordan Construction

Customer Category: 00 - No category

Corporate Customer:

Monthly Container Hire:

Order Number Required:

Use Item Tariff Prices:

Billing Interval: On Month End | 0

Version: V6.3.0.3

Volume	Contract	Start Date	End Date	Description

Buttons: Edit / View, All Contracts, On Rent Contracts, Outstanding Items, Outstanding Contract Balances

Click on Column Header to sort. Click on line to select Transaction.

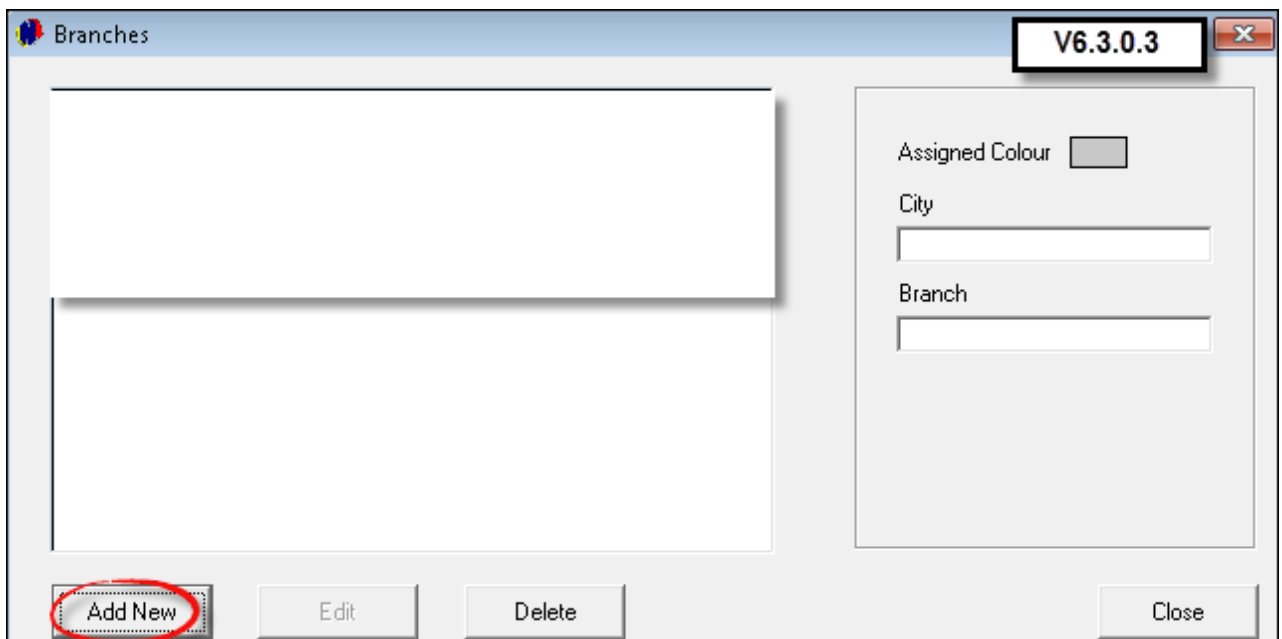
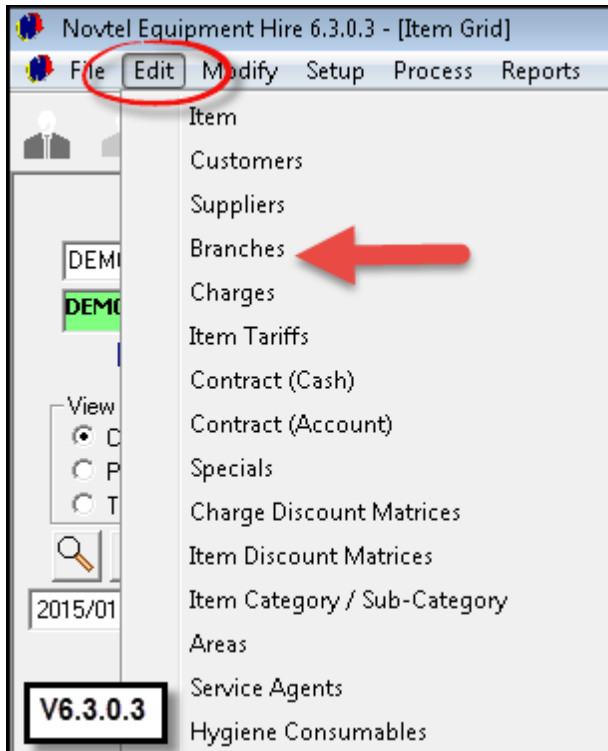
Summary: Account Balance: 0.00, On Rent Total: 0.00, Total Due: 0.00, Available Credit: 0.00

Buttons: Provisional Customer Statement, Pastel Customer Statement, Accept, Cancel

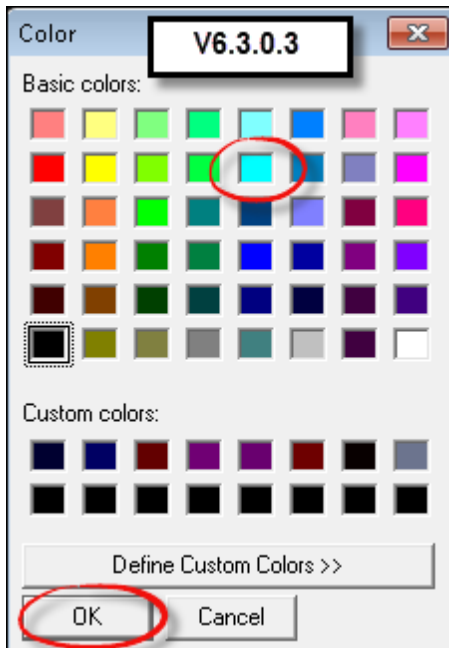
- Create all other "Customers", as well as a "Maintenance" Customer (Normally your own Company). You will see how this be used when "Branches" are created

## 4 Step 4 - Creating Branches

- Different "**Branches**" can be created and managed by one system. Should it happen that a "**Branch**" in one town has available Containers for rent, and another "**Branch**" urgently needs a Container for a Customer, the Container can be transferred from the one "**Branch**" to the other
- A "**Maintenance Branch**" must also be created - all containers that must be modified or repaired, can be transferred to this "**Branch**"
- Each "**Branch**" is created in it's own distinctive color
- In order to create the above, click on "**Edit - Branches**", and then "**Add New**"



- Click on a color for the containers to display in "**Branch**" colors - as light as possible in order to be able to see the Container Codes clearly. Click "**OK**" to select the color



The "**Branch**" color now displays at the top of the screen. Enter the following:

1. City (Or Town)
2. Branch (The area within the city or town's parameters where this "**Branch**" is located)
3. Enter all contact details and address for this "**Branch**"
4. The "**Maintenance Branch**" check-box must be selected when the "**Maintenance Branch**" is created



- Click on the magnifying glass next to "Maintenance Customer"

- Click on one of the "Search" options in order to search for the "Maintenance Customer" (As mentioned at the end of Step 3)

- We have selected "Number" for the "Search Option", and all "Customers" in the system now appears in the window. Click on the "Maintenance Customer", and then "Select"

Number	Description	ID Number	Telephone	Mobile Phone	External Ref	Physical Address	Postal Address	Email	
AN0001	Andrews Construction	5601020022022	044 695 00000	082 695 00000		17 Mountain Rd	PO Box 000	andrews@constructic	F
JD0001	Jordan Construction	6502280048258	044 999 888 77	081 999 888 77		24 West Street	PO Box 7777777	jordan@construction.	F
NO0001	Novtel Container Hire	501000020033	0861 66 88 35	081 22 33 44 55		Diaz Office Park	PO Box 22223333	info@novtel.com	F
WE0001	Westcor Construc	7612300022022	044 500 000	086 953 852 74		99 East Ave	PO Box 555888	Westcor@constructic	F

Search:  Number  Description  ID Number  Telephone #  Mobile Phone #  External Ref  Physical Address  Postal Address  Email Address

Buttons: Refresh <F5>, Add New <F6>, Edit, Select <F7>, Close

- Tick the check-box if all maintenance will be done by an "External Supplier", and not internally by your own personnel
- Now we need to select the "Maintenance Supplier". Click on the magnifying glass next to "Maintenance Supplier" in order to open the window containing all "Suppliers"
- If the appropriate "Supplier" was not created yet, click "Add New" and enter all details
- For an existing "Supplier", click on the "Supplier" and then on "Select"

Assigned Colour:  

City: Mossel Bay Branch: Voorbaai Sub-Hire Branch:

Tel: 0861 66 8835 Fax: 0861 66 8835 e-mail: info@novtel.com website: www.novtel.com

Dedicated Cashier  Dedicated Invoice User  Maintenance Branch

Maintenance Customer: NO0001 Novtel Container Hire

All Maintenance by External Supplier:  1

Maintenance Supplier: CON001 Container Manufacturers

Default Cashbook Entry Types:

Cash: 0 Daily Taking Control  
Credit Card: 0 Daily Taking Control  
Cheque: 0 Daily Taking Control  
Bank Transfer: 0 Daily Taking Control

Buttons: Accept, Cancel

V6.3.0.3

Number	Description	Telephone	Fax
CON001	Container Manufacture	044 873 123 4567	044 873 123 4567

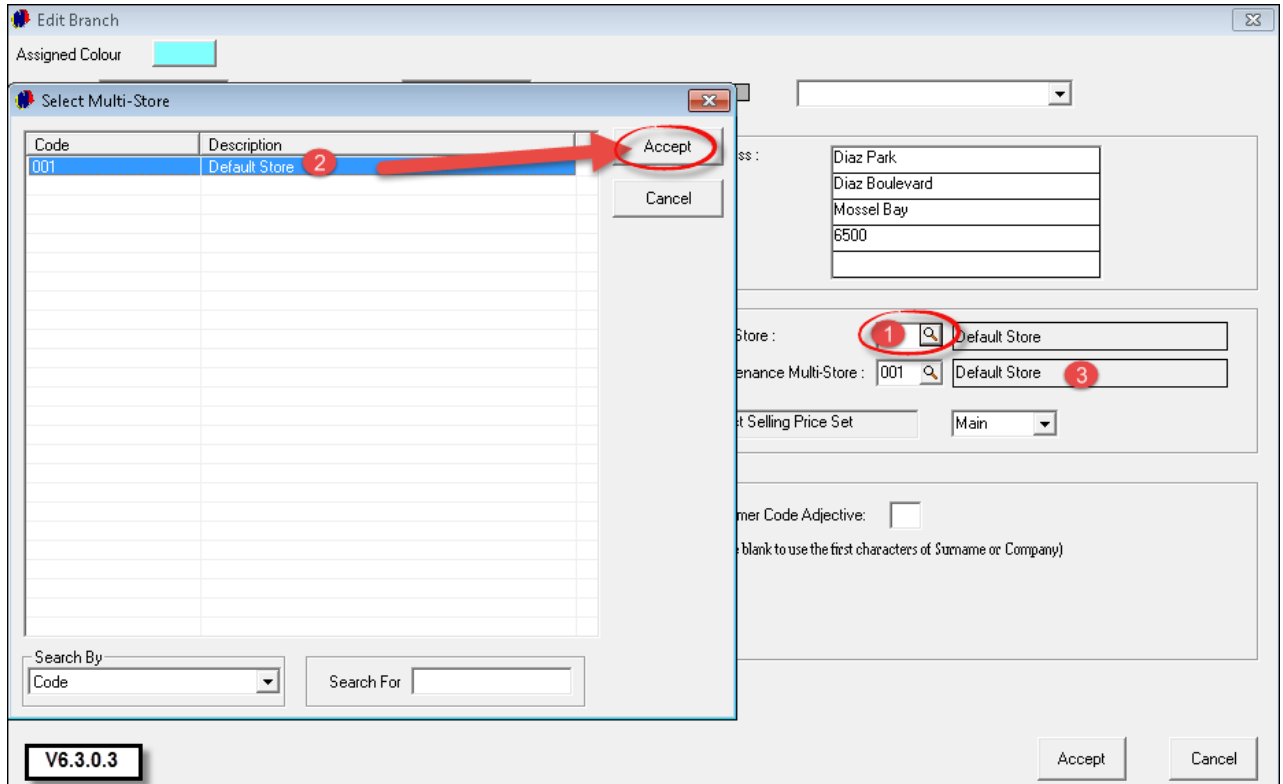
Supplier List Search:  Number  Description

Buttons: Refresh, Add New, Edit, Select, Close

If the **"Pastel Multi Stores"** Module is installed on your computer, and **"Multi Stores"** have been created in Pastel:

1. Click on the magnifying glass
2. Click on the **"Multi Store"** for THIS **"Branch"**, and then on **"Accept"**
3. Do the same with the **"Maintenance Multi Stores"**

If the **"Multi Stores"** module is not installed in Pastel, select the **"Default Store"** for both



- In Pastel, different selling prices can be created. Insert the appropriate "Price List" here
- The "Default Cashbook Entry Types" will be entered automatically
- Click "Accept" to save this "Branch"

**Edit Branch** V6.3.0.3

Assigned Colour: [Color]

City: Mossel Bay Branch: Voorbaai Sub-Hire Branch: [ ]

Tel: 0861 66 8835 Fax: 0861 66 8835 e-mail: info@novtel.com website: www.novtel.com

Address: Diaz Park, Diaz Boulevard, Mossel Bay, 6500

Maintenance Customer: NO0001 Novtel Container Hire  
All Maintenance by External Supplier:   
Maintenance Supplier: CON001 Container Manufacturers

Multi-Store: 001 Default Store  
Maintenance Multi-Store: 001 Default Store  
Select Selling Price Set: **Main** (circled in red)

Default Cashbook Entry Types:  
Cash: 0 Daily Taking Control  
Credit Card: 0 Daily Taking Control  
Cheque: 0 Daily Taking Control  
Bank Transfer: 0 Daily Taking Control

Customer Code Adjective: [ ]  
(Leave blank to use the first characters of Supplier Code)

Accept (circled in red) Cancel

- Create all other "Branches", as well as the "Maintenance Branch"

**Branches** V6.3.0.3

George	Industria
Knysna	Heads
Mossel Bay	Maintenance
Mossel Bay	Voorbaai
Plettenberg Bay	Industria

Assigned Colour: [Black]

City: Impossible

Branch: [ ]

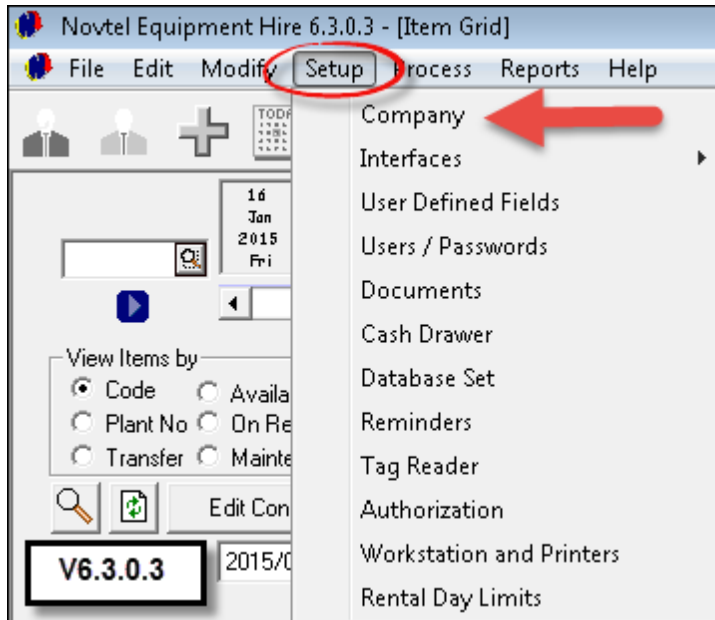
Add New Edit Delete Close

Remember to return to "Setup - Users/Passwords", and "Edit" each "User" in order to select the "Branch" they are connected to

## 5 Step 5 - Setup Company

Please note that the same program is used for the hiring of different types of Equipment; Containers and the Hygiene Industry. Not all of the Company Settings will be applicable for Container Hire. Please consider all the settings carefully

- Click on "Setup - Company"



- In the "Company Details" tab, complete all information correctly, since this information will reflect on all company documentation such as Invoices; Quotes; Customer Statements etc.

Company Setup

**Company Details** | General | Financial | Preferences | POS | Images

Name : Novtel Container Hire  
 Tel : 0861 66 8835  
 Fax : 0865 1171 65  
 Cell :  
 Company Email : sales@novtel.com  
 Address : Diaz Office Park  
 Block 1 Unit 30  
 Beach Boulevard West  
 Diaz Beach, Mossel Bay  
 South Africa

Email Address : sales@novtel.com  
 (for this computer)  
 Computer Location : Forum Administration

Use Branch Address and contact details

V6.3.0.3 | Accept | Cancel

1. Proceed to the "General" tab and enter the "Automatic Refresh Interval". We have set the interval at 60 seconds
2. The number of rows on the Grid represent the number of items to be viewed simultaneously - we have selected 15. Please note that this will only come into effect when items have been inserted into the system. The number of columns represent the number of days to be viewed in advance - we have selected 45
3. Activate Monthly Billing (Very Important for Container Hire)
4. Select the "Cross Hire Branch" - we have selected our own "Branch"
5. Tick the check-box if you want to activate the option to allow discount on contracts

Company Setup

Company Details **General** Financial Preferences POS Images

Automatic Refresh Interval  Seconds

Enter 0 to disable automatic refresh

Number of rows on Grid

Number of columns on Grid

Activate Monthly Billing  Yes  No

Activate Access Control  Yes  No

Activate Recurring Maintenance  Yes  No

Force Agent Commission  Yes  No

Default Return Time

Minimum Password Length (0 = No check)

Force use of return time

Return Cut-off (Half/ Full day) hour/s (30 Minutes = .3)

Default Half Day Value (If half day = 60% enter 0.6)

Short Rent Cut-off in hour/s (30 Minutes = .3)

Short Rent Value (If 55% enter 0.55)

Allow - Cancel Hire Items with outstanding Balance

Allow Additional Costs Posting only for On Rent Status

Allow changing Status to On Rent for Future rentals

Activate Novtel Online Bookings

Activate Demo Mode

Override Credit Limit Check

Return Deposit Container only if selected

Allow only Permanent Branch transfers

Allow Work Order creation at Branch level

Allow Rentals to overlap by  day/s

Allow Grace Period of  hour/s

Allow Backdated Return of  day/s

Force Plant No. to Cost Code

Increment Hire Days on Sunday (Checked = Charge)

Activate Sundays on Item Level

Increment Hire Days on Saturday (Checked = Charge)

Charge Half Day on Saturday (Checked = Charge)

Activate Saturdays on Item Level

Increment Hire Days on Public Holidays (Checked = Charge)

Activate Holidays on Item Level  Setup Holidays

Activate Monthly Fixed Rates  4

Activate Weekly Rates

Activate Weekly Rates on Item Level

Cross Hire Branch

Cash Customer Category

Force use of Customer Email Recording

Print Hygiene Slips

Allow Contract Discount  5

Allow Item Remove (More than one day selected)

Allow Multiple off-hire Days

Allow off-hire Days select on Provisional

Display End Date on Documents

Remove Customer Required Fields

V6.3.0.3

Accept Cancel

1. Proceed to the **"Financial"** tab, and select the option to **"Use Tax"**
2. Enter your Company's Tax Number
3. Set the Tax percentage
4. The **"Service Charge"** field will normally not be used in Container Hire
5. The **"Update Cost/Selling Prices"** field will be used only when you are selling physical items
6. Set the formats for Customer and Supplier Invoices, and set the **"Invoice Date Method"**

Company Setup

Company Details | General | **Financial** | Preferences | POS | Images

VAT / GST / Sales Tax

1 Use Tax:  Yes  No

Tax Number: 123456789 2

Default Tax Type: 1 - Vat - Standard rated (14%) 3

Service Charge 4

Tax on Service Charge:

Charge Code: [ ] Service Charge: 0 % Clear

Invoiced Service Charge Code - Link to Charge Code: [ ] Clear

Update Cost/Selling Prices 5

Round Cost/Selling Price to next: 0.50

Example: 0.05 (0.33 to 0.35) 0.50 (0.33 to 0.50)

Default Markup Percentage: 0.50

Update Customer Invoices 6

Next Invoice Number Format (AANNNNNN): IN000001

Invoice Date Method: Update Date

Invoice Adjective: GI

Update Customer Credit Notes

Next Credit Note Number Format (AANNNNNN): CN000001

Update Supplier Invoices

Next Invoice Number (AANNNNNN): PNN00001

Invoice Date Method: Update Date

V6.3.0.3 | Accept | Cancel

- The **"Preferences"** tab represent **"Maintenance"**, and on containers there are no recurring maintenance on a regular basis - as the case would be with power tools etc.
- If you use multiple **"Branches"**, select the path to synchronize your database

Company Setup

Company Details | General | Financial | **Preferences** | POS | Images

Maintenance Defaults

First Maintenance: 0 DAYS

Recurring Interval: 0 DAYS

Please select or enter the path to the database used for synchronisation of your equipment database

[ ]

V6.3.0.3 | Accept | Cancel

1. In the "POS" tab - Front Desk section - tick the check-box to "Enable Discount", and set the "Maximum Percentage" for discount to be given
2. "Enable Quick Scan" if you are using a bar-code scanner (This will be used when you have a shop where physical items are sold)
3. Tick the check-box if you want to "Show Inventory Details" on the Front Desk documents
4. Enable the "Allow Line Amount Change" option in order to enter another amount for an item
5. Enable the option to send "POS Invoice / Credit Note to Slip Printer"
6. Tick the check-box to send "Work Order POS Invoice to Slip Printer" (For Maintenance)
7. In the "General" Field of the "POS" tab, select the option you prefer, or simply leave it blank
8. The following charges must have been created in "Edit - Charges", and inserted in the appropriate fields (As explained in Step 2):
  - POS / Shop In-House Charge
  - POS / Shop In-House Payout/ Credit Note
  - Late Return Charge
  - Replacement Charge
  - Repair Charge
  - Hygiene Service Charge

Company Setup

Company Details    General    Financial    Preferences    **POS**    Images

**Front Desk**

1 Enable Discount     Enable Quick Scan  2

Max Discount Percentage 5    Show Inventory Details  3

Print Access Permit     Allow Line Amount Change  4

POS Invoice / Credit Note to Slip Printer  5

**Work Order**

Work Order POS Invoice to Slip Printer  6

**General**

Posting of Shortages/Over Journal by Supervisor Shift Cashup  7

Hide Shift totals on Money count

**In House Charge**

POS/Shop In-House Charge Code  8    Clear

POS/Shop In-House Payout/Credit Note     Clear

**Late Return Charge Code**

   Clear

**Replacement Charge Code**

   Clear

**Repair Charge Code**

   Clear

**Hygiene Service Charge Code**

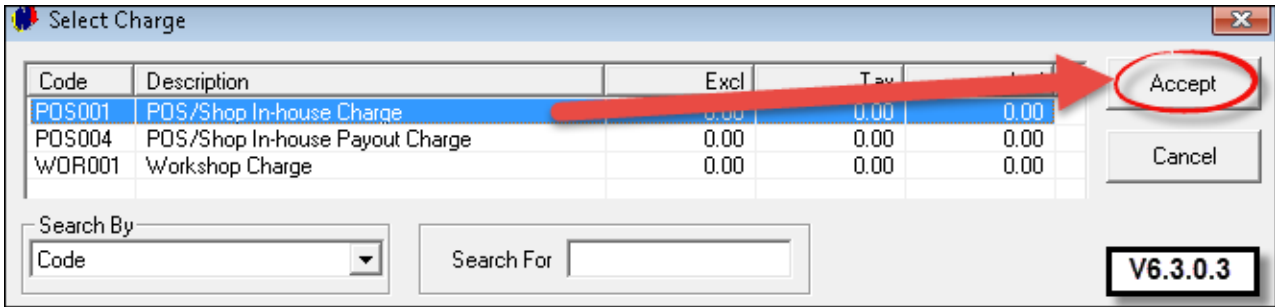
   Clear

V6.3.0.3    Accept    Cancel

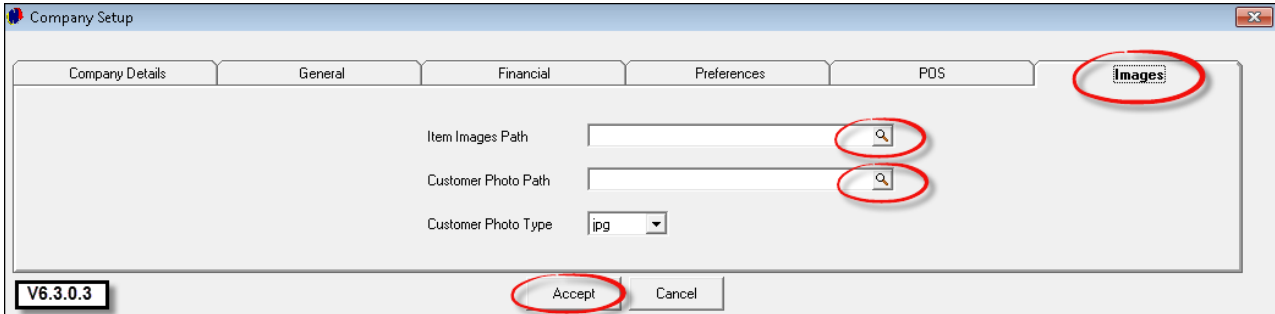
- In order to insert the codes, click on the magnifying glass to open the "Charges" window



- Browse for the appropriate charge; click on it, and then “Accept”

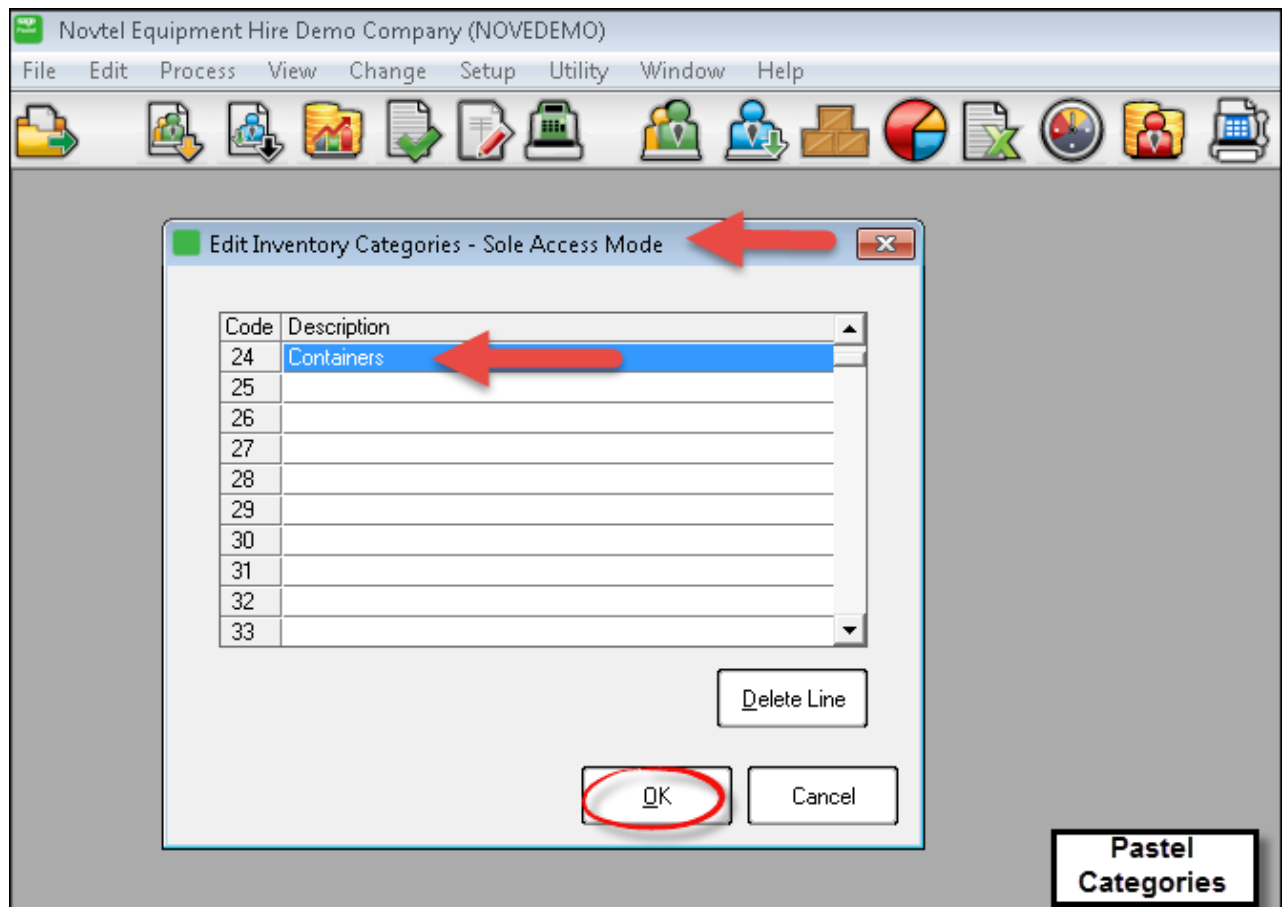


- When you take pictures with a digital camera of the items in the system, it can be downloaded to your computer, and insert the path to the pictures in the “Images” Tab. Select the “Item Images Path”, as well as the “Customer Photo Path”. Enter the format for the “Customer Photo Type” – JPEG is recommended
- Click “Accept” to save the details in all the tabs

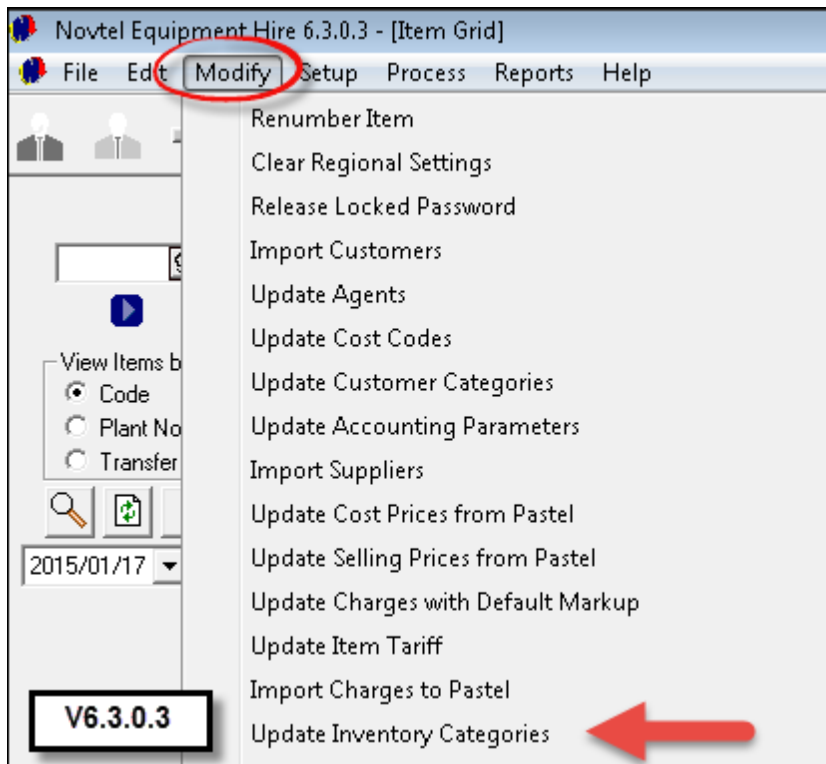


## 6 Step 6 - Creating Item Categories / Sub-Categories

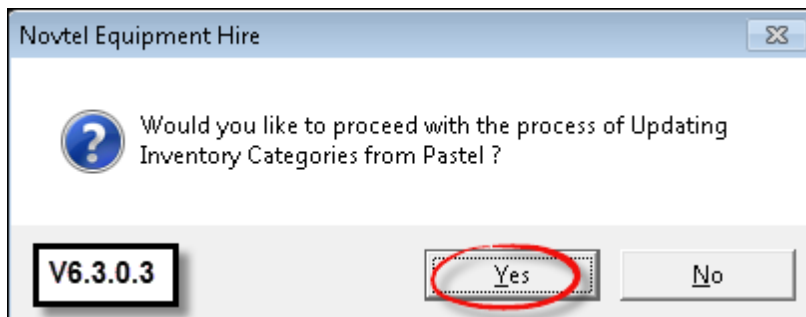
- If Novtel is integrated with Pastel, first create Inventory Categories in Pastel ("Edit – Inventory – Categories")



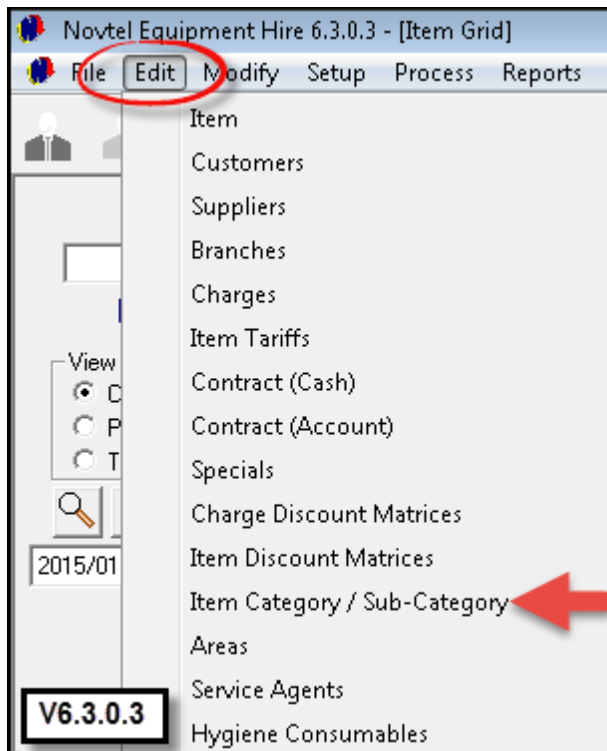
- In Novtel, update the created "Categories" from Pastel in "Modify - Update Inventory Categories"



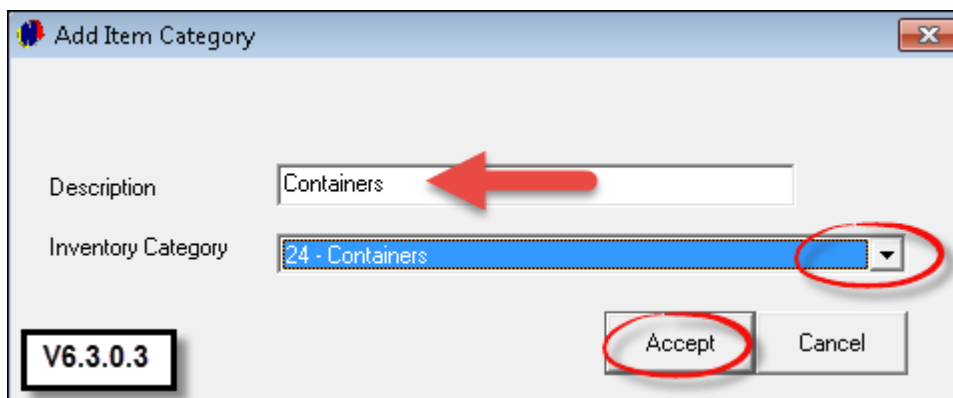
- Click "Yes" to confirm the import to Novtel. The system will automatically do the update with no further communication to you



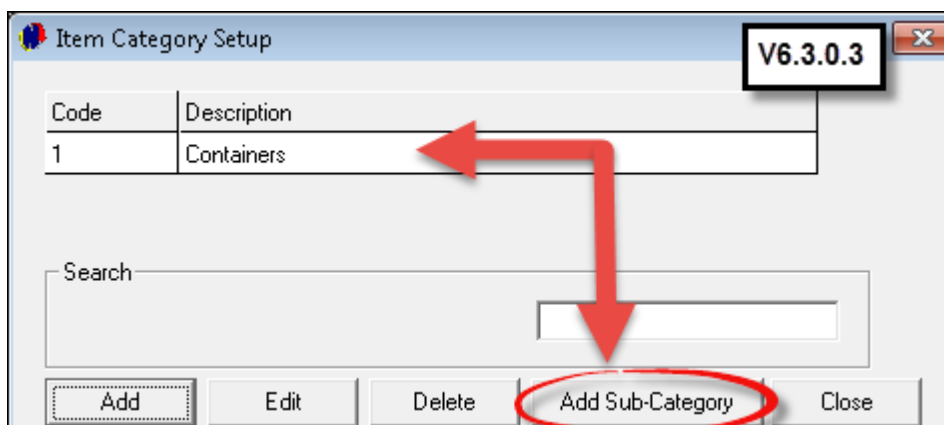
- Click on "Edit - Item Category / Sub Category", and then "Add"



- Enter the "Category Description" - in this case it is "Containers"
- Click on the arrow next to "Inventory Category" and select the "Container" category, and then "Accept"



- The "Container Category" is now entered, and the Containers itself must be created as "Sub-Categories"



- In order to create the first Container in this Category, click "Add"

**Edit Item Category**

Code: 1

Description: Containers

Inventory Category: 24 - Containers

**ITEM SUB-CATEGORY**

Code	Description	Category Description
------	-------------	----------------------

Buttons: Add, Edit, Accept, Cancel

V6.3.0.3

The "Item Category" has been entered already. Now enter:

1. The "Description" for this first Container
2. The Tax Rate
3. The rental price per month
4. The suggested deposit amount, payable when the Container is rented
5. In the "Detailed Description" field, enter the Container's dimensions; weight; opening size etc.
6. None of the other details in this screen are applicable for Containers. Click "Accept"

**Edit Item Sub-Category**

Code: 1

Item Category: 1 Containers **1**

Description: Container 1 - 6 Meter Steel

Tax: 1 - Vat - Standard rated (14%) **2**

	Including	TAX	Excluding
Price Per Day	0.00	0.00	0.00
Price Per Week	0.00	0.00	0.00
Price Per Month <b>3</b>	2000.00	245.61	1754.39
Price Per Hour	0.00	0.00	0.00
Price Per Service	0.00	0.00	0.00

Hygiene Service Charge Code:

Suggested deposit: 10000.00 × Price **4**

Detailed Description:

External Dimensions **5**  
 Length 6.11m  
 Width 2.44m  
 Height 2.59m

Internal Dimensions  
 Length 5.87m  
 Width 2.43m  
 Height 2.38m

Cubic Capacity: 31m3  
 Floor Area: 13.75m2  
 Door Opening Width: 2.34m

Door Opening Height: 2.31m  
 Weight: 2300KG

V6.3.0.3 **6** Accept Cancel

In order to create the other Containers as "**Sub-Categories**", click "**Add**" and follow the steps above until all Containers are entered

Code: 1

Description: Containers

Inventory Category: 24 - Containers

**ITEM SUB-CATEGORY**

Code	Description	Category Description
1	Container 1 - 6 Meter Steel	Containers
2	Container 2 - 6 Meter Steel	Containers
3	Container 3 - 6 Meter Steel	Containers
4	Container 4 - 6 Meter Steel	Containers
5	Container 5 - 6 Meter Steel	Containers
6	Container 6 - 12 Meter Steel	Containers
7	Container 7 - 12 Meter Steel	Containers
8	Container 8 - 12 Meter Steel	Containers
9	Container 9 - 12 Meter Steel	Containers
10	Container 10 - 12 Meter Steel	Containers

Buttons: Add, Edit, Accept, Cancel

V6.3.0.3

Whenever you need to make changes to the "**Sub-Categories**", click on it; click "**Edit**"; make the changes, and click "**Accept**"

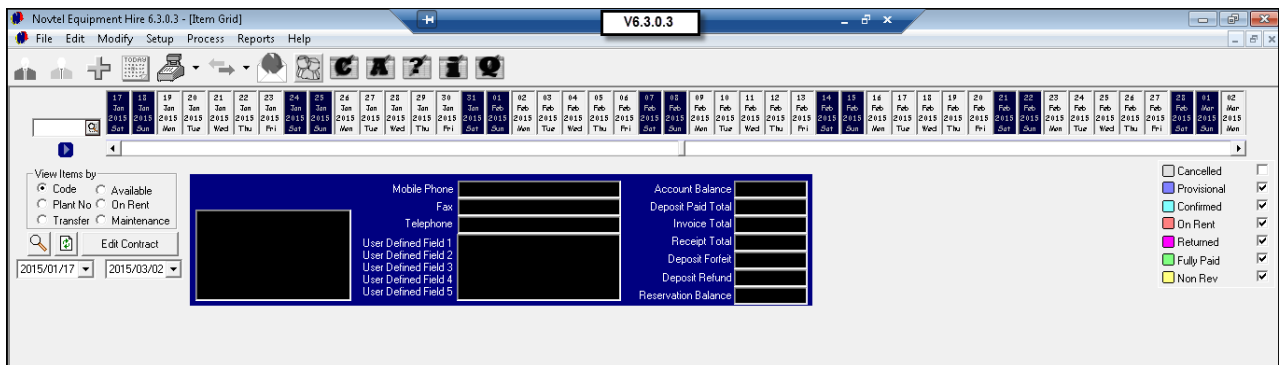
## 7 Step 7 - Creating Items

➤ Before any item can be added to the system, the following **MUST** be created already:

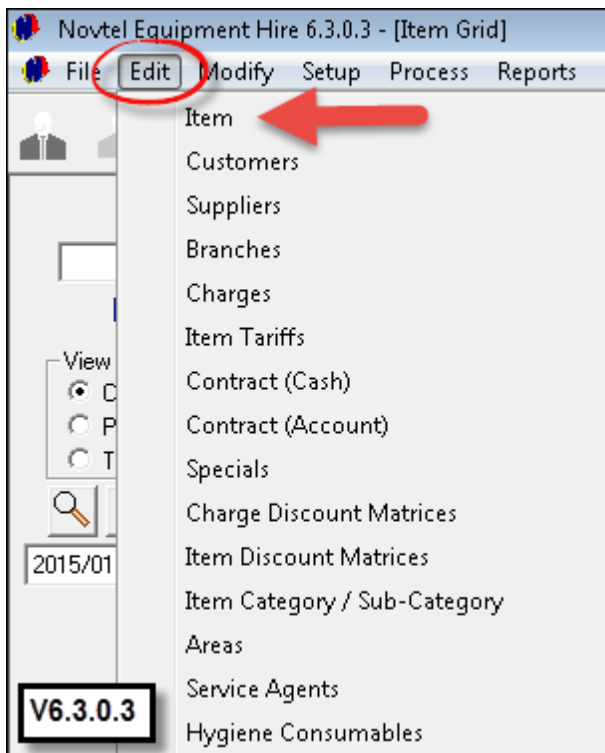
- Branches
- Item Categories and Sub-Categories

Very important to remember: If the Company is using Pastel Multi-Stores, the User must run **"Import Charges to Pastel"** from the **"Modify Menu"** after creating any new items. **"Items"** are linked to an **"Item Category"** and **"Sub-Category"**, therefore we need to create the specific **"Items"** that have been created as **"Sub-Categories"** as well.

This is the empty Grid before any **"Items"** have been created



- In order to start adding **"Items"** to the system, click on **"Edit – Item"**, and click **"Add New"**





Item Setup

Code	Description	Charge	Plant Number

V6.3.0.3

Code

Item Tariff

Plant Number

Auto Create

Cost Price

Rental per day (Excl)

Tax

Rental per day (Incl)

Search

Search By

Search For

Description

Branch

**Add New** Edit Delete Close

- Tick the check-box to “**Create Item in Pastel**”. If the option is not selected, you will have to create each **Item** manually in Pastel. But if the check-box is ticked, it will automatically be created when the **Inventory Item Import** is done as we will explain at the end of Step 7
- You do not need to enter an **Item Code** – the system will generate it. The system also generates the description according to the information that is entered for the **Plant Number**; **Manufacturer** and **Sub-Category**. See how the description changes with each of the above entries

**Add New Item**

Code  **X**

Description  **X**

Create Item In Pastel

**General** | Details | Financial | User Defined Fields | Pastel Interface

Home Branch

Branch  Mossel Bay, Voorbaai  Mossel Bay, Voorbaai

Plant Number

Serial Number

External Reference

Manufacturer

Type

Item Category 0

Item Sub Category 0

In Stock

On Rent

Available

Show On Grid

Subhire Item

Monthly Billed Item

Maintenance Item

Rain Day/Off-Hire Item

Accept Cancel

**V6.3.0.3**

➤ Select the following in the **"General Tab"**:

1. The **"Branch"** to which this item is added (Please note that **"Items"** for each **"Branch"** must be added separately)
2. **"Plant Number"** (This number is allocated by the company, and is unique to the **"Item"**)
3. Enter the **"Manufacturer's"** name
4. Click on the arrow next to the **"Type"**, and select **"Container"**
5. Click on the magnifying glass next to **"Item Category"**, in order to open the window containing all **"Categories"**

**Add New Item**

Code   Create Item In Pastel

Description , C Factory, 1

**General** Details Financial User Defined Fields Pastel Interface

Home Branch

Branch  Mossel Bay, Voorbaai  Mossel Bay, Voorbaai

Plant Number 1

Serial Number

External Reference

Manufacturer C Factory

Type

Item Category 0

Item Sub Category

In Stock 1

On Rent 0

Available 1

Show On Grid

Subhire Item

Monthly Billed Item

Maintenance Item

Rain Day/Off-Hire Item

**V6.3.0.3** Accept Cancel

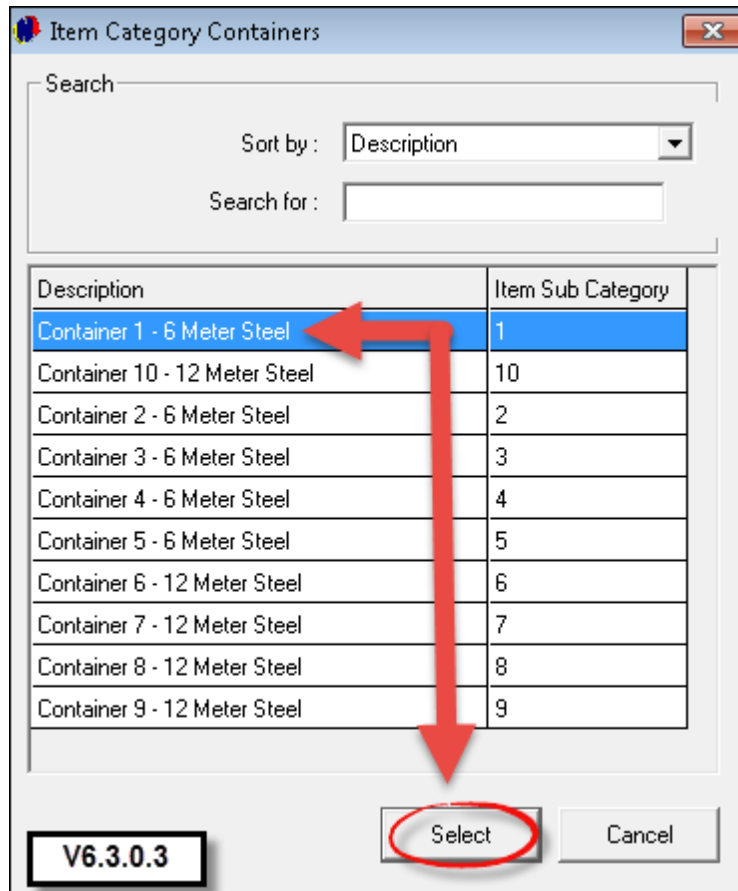
- Click on the **"Category"** the Item belongs to, and then **"Accept"**

**Select Item Category**

Code	Description
1	Containers

**V6.3.0.3** Accept Cancel

- The window containing all the "Sub-Categories" will open immediately. Click on the "Sub-Category" to be inserted, and "Select" it



1. See how the "**Description**" has now been entered
2. The "**Category**" and "**Sub Category**" has been inserted
3. The following will ALWAYS be the same when an "**Item**" is created:
  - In Stock: 1
  - On Rent: 0
  - Available: 1
4. Tick the check-box to "**Show On Grid**"
5. The "**Monthly Billed**" check-box must also be selected

The screenshot shows the 'Add New Item' dialog box with the following fields and values:

- Code:** (empty)
- Description:** Container 1 - 6 Meter Steel, C Factory, 1 (marked with 1)
- General Tab:** (circled in red)
- Branch:** Mossel Bay, Voorbaai
- Home Branch:** Mossel Bay, Voorbaai
- Plant Number:** 1
- Serial Number:** (empty)
- External Reference:** (empty)
- Manufacturer:** C Factory
- Type:** Container
- Item Category:** 1 Containers (marked with 2)
- Item Sub Category:** 1 Container 1 - 6 Meter Steel (marked with 2)
- In Stock:** 1 (indicated by a red arrow)
- On Rent:** 0 (marked with 3)
- Available:** 1 (indicated by a red arrow)
- Show On Grid:**  (marked with 4)
- Subhire Item:**
- Monthly Billed Item:**  (marked with 5)
- Maintenance Item:**
- Rain Day/Off-Hire Item:**

Buttons: Accept, Cancel

- In the "**Details**" tab, there is nothing to complete, except for the "**Detailed Description of the Item**"

- In the "Financial" tab, enter the Container's cost price - the price the company paid for it
- The Rental amount will be inserted automatically, since we have entered the amount when the "Sub-Category" was created, and selected that "Sub-Category" in the "General" tab

**Add New Item**

Code:

Description:

Create Item In Pastel

General | Details | **Financial** | User Defined Fields | Pastel Interface

Cost Price:

	Per Day	Per Week	Per Month	Per Hour
Rental Excl Tax	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="1754.39"/>	<input type="text" value="0.00"/>
Tax	<input type="text" value="0.00"/>	<input type="text" value="0.00"/>	<input type="text" value="245.61"/>	<input type="text" value="0.00"/>
Rental Incl Tax	<input type="text" value="0"/>	<input type="text" value="0"/>	<input type="text" value="2000"/>	<input type="text" value="0"/>

Per Day  Per Hour

**V6.3.0.3**

- In order to setup "User Defined Fields" where additional information pertaining to "Items" can be entered in the "User Defined Fields", click on "Setup - User Defined Fields". This is not part of this tutorial. Please register on Novtel's Forum at <http://www.novtel.com/forum/index.php> for more information

- In the "Pastel Interface" tab, the "Pastel Inventory Code" and "Pastel Cost Code" has not been entered yet, since the "Import" to Pastel has not been completed. Also: the "Item Code" has not yet been created. (This will all be created as soon as the "Pastel Import" is done)
- Click "Accept"

**Add New Item**

Code   Create Item In Pastel

Description

General Details Financial User Defined Fields **Pastel Interface**

Pastel Inventory Code   Clear

Pastel Cost Code   Clear

**V6.3.0.3**

➤ In the "Import Inventory to Pastel" window:

1. See how the "Item Code" has now been created
2. Select "Services" for the "Inventory Group"
3. Select "Service Item" - since the Container will not be sold, but rented
4. Tick the check-box to "Create a Cost Code" in Pastel
5. When "All Multi Stores" are selected, the "Default Store" will be ticked
6. Alternatively, tick "Selected Stores" for specific "Multi Stores" if it is setup in Pastel
7. Click "Accept"

Import Inventory Item

Code: 01001001

Description: Container 1 - 6 Meter Steel, C Factory,

Inventory Group: 001 - Services

Excl Selling Price: 0.00

Physical Item

Service Item

Create Cost Code

Cost Code

Code: 1

Description: Container 1 - 6 Meter Steel, C

Code	Description
<input checked="" type="checkbox"/> 001	Default Store

Multi-Store Select

All Multi-Stores

Selected Multi-Stores

V6.3.0.3



- Returning to the Item's **"Pastel Interface"** Tab, the Pastel Inventory and Cost Codes have been entered

**Edit Item** V6.3.0.3

Code: 01001001  
 Description: Container 1 - 6 Meter Steel, C Factory, Sub Hire

General | Details | Financial | User Defined Fields | **Pastel Interface**

Pastel Inventory Code: 01001001 [Search] Container 1 - 6 Meter Steel, C Factory, [Clear] ←

Pastel Cost Code: 1 [Search] Container 1 - 6 Meter Steel, C [Clear] ←

- Now click **"Add New"** in order to add all other Containers

**Item Setup** V6.3.0.3

Code	Description	Charge	Plant Number
01001001	Container 1 - 6 Meter Steel, C Factory,	0.00	1
01010001	Container 10 - 12 Meter Steel, C Factory	0.00	10
01002001	Container 2 - 6 Meter Steel, C Factory,	0.00	2
01003001	Container 3 - 6 Meter Steel, C Factory,	0.00	3
01004001	Container 4 - 6 Meter Steel, C Factory,	0.00	4
01005001	Container 5 - 6 Meter Steel, C Factory,	0.00	5
01006001	Container 6 - 12 Meter Steel, C Factory,	0.00	6
01007001	Container 7 - 12 Meter Steel, C Factory,	0.00	7
01008001	Container 8 - 12 Meter Steel, C Factory,	0.00	8
01009001	Container 9 - 12 Meter Steel, C Factory,	0.00	9

Code: 01010001  
 Item Tariff:   
 Plant Number: 10  
 Auto Create

Cost Price: 0.00  
 Rental per day (Excl): 0.00  
 Tax: 0.00  
 Rental per day (Incl): 0.00

Search  
 Search By: Plant Number  
 Search For:   
V6.3.0.3

Description: Container 10 - 12 Meter Steel, C Factory  
 Branch:  Mossel Bay, Voorbaai

**Add New** | Edit | Delete | Close

- All the "Items" are now displayed on the Grid

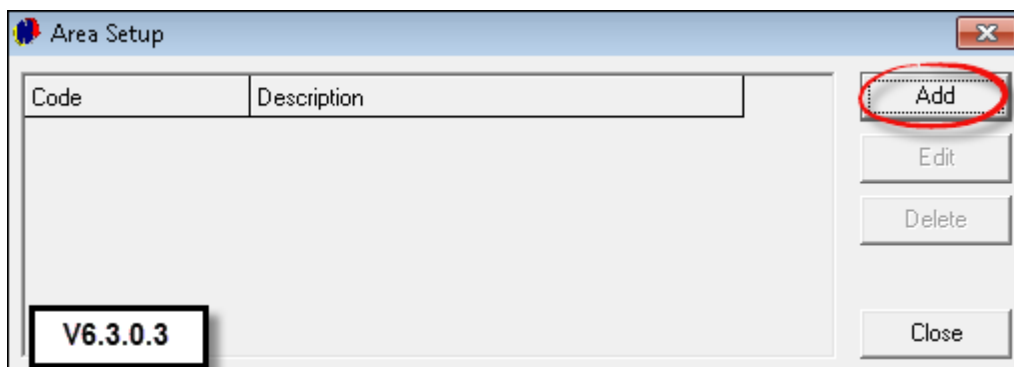
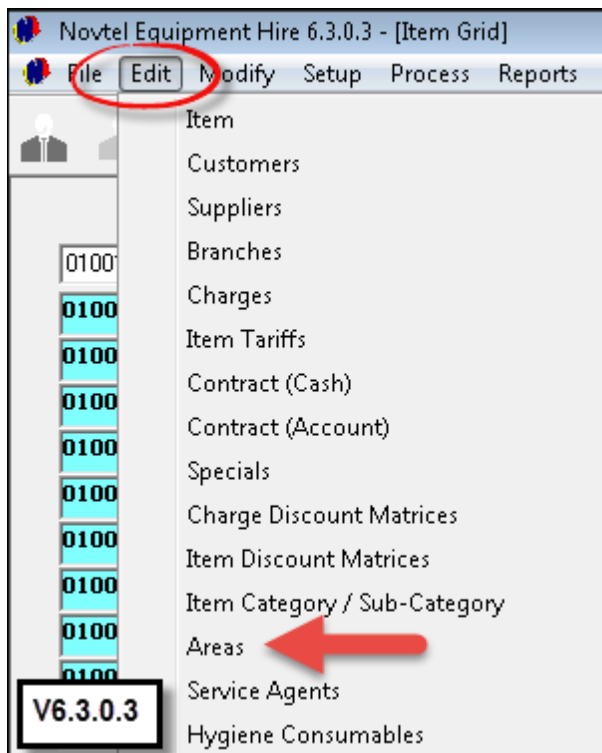
	17 Jan 2015 Sat	18 Jan 2015 Sun	19 Jan 2015 Mon	20 Jan 2015 Tue	21 Jan 2015 Wed	22 Jan 2015 Thu	23 Jan 2015 Fri	24 Jan 2015 Sat	25 Jan 2015 Sun
01001001									
01002001									
01003001									
01004001									
01005001									
01006001									
01007001									
01008001									
01009001									
01010001									

## 8 Step 8 - Creating Areas

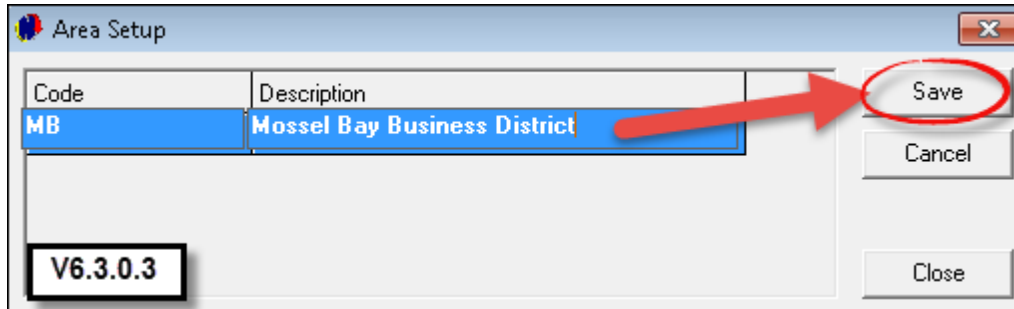
"Areas" must be set up in order to categorize different areas that the company operates within. For instance: in the greater Mossel Bay area, the following surrounding "Areas" can be created:

- Mossel Bay Business District
- Little Brak River
- Heiderand
- Dana Bay
- Great Brak River
- Hartenbos

- In order to set up the above mentioned, click on "**Edit - Areas**", and click "**Add**"



- Enter the "Code" that you would like to allocate to the "Area" (We are using MB), as well as the "Description" - in this case it is "Mossel Bay Business District"

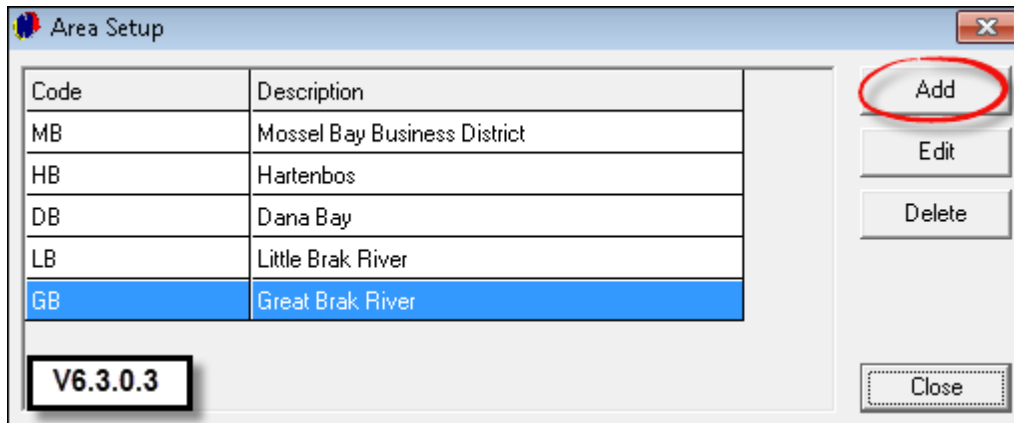


The screenshot shows the 'Area Setup' dialog box with a table containing one row: Code 'MB' and Description 'Mossel Bay Business District'. The 'Save' button is circled in red, and a red arrow points to it from the right. Below the table is a version number 'V6.3.0.3' in a box. On the right side, there are buttons for 'Save', 'Cancel', and 'Close'.

Code	Description
MB	Mossel Bay Business District

V6.3.0.3

- Click "Add" again in order to complete setting up all other "Areas"

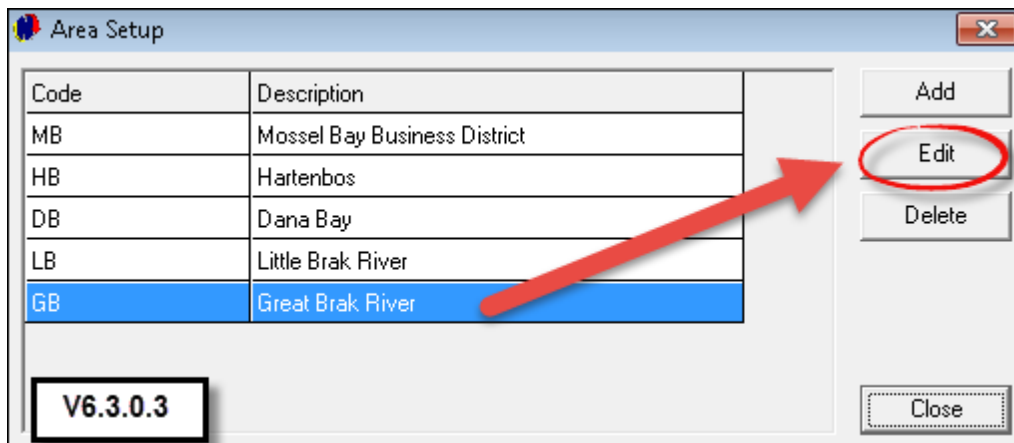


The screenshot shows the 'Area Setup' dialog box with a table containing five rows: Code 'MB' (Mossel Bay Business District), 'HB' (Hartenbos), 'DB' (Dana Bay), 'LB' (Little Brak River), and 'GB' (Great Brak River). The 'Add' button is circled in red. Below the table is a version number 'V6.3.0.3' in a box. On the right side, there are buttons for 'Add', 'Edit', 'Delete', and 'Close'.

Code	Description
MB	Mossel Bay Business District
HB	Hartenbos
DB	Dana Bay
LB	Little Brak River
GB	Great Brak River

V6.3.0.3

- In order to make changes to an "Area", click on it, and then "Edit". After the changes was made, click "Save"

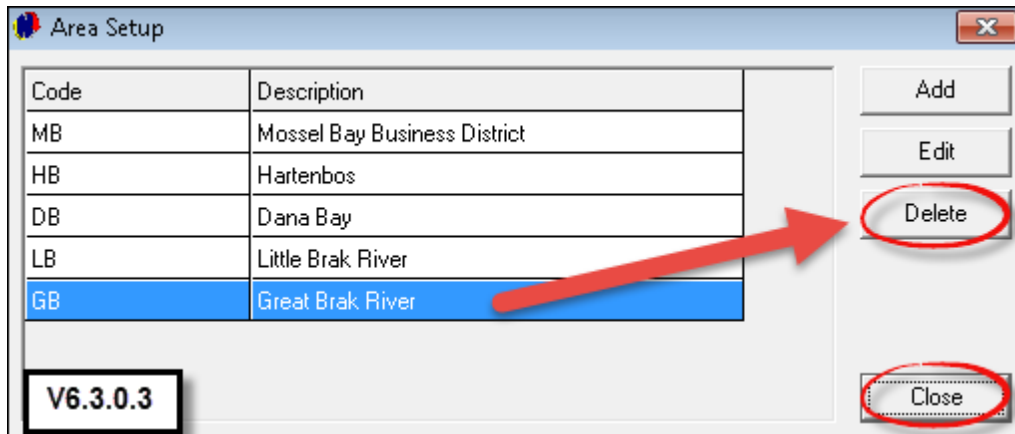


The screenshot shows the 'Area Setup' dialog box with a table containing five rows: Code 'MB' (Mossel Bay Business District), 'HB' (Hartenbos), 'DB' (Dana Bay), 'LB' (Little Brak River), and 'GB' (Great Brak River). The 'Edit' button is circled in red, and a red arrow points to it from the right. Below the table is a version number 'V6.3.0.3' in a box. On the right side, there are buttons for 'Add', 'Edit', 'Delete', and 'Close'.

Code	Description
MB	Mossel Bay Business District
HB	Hartenbos
DB	Dana Bay
LB	Little Brak River
GB	Great Brak River

V6.3.0.3

- Should you wish to remove an "Area", click on it and then on "Delete". When all "Areas" have been entered, click "Close"



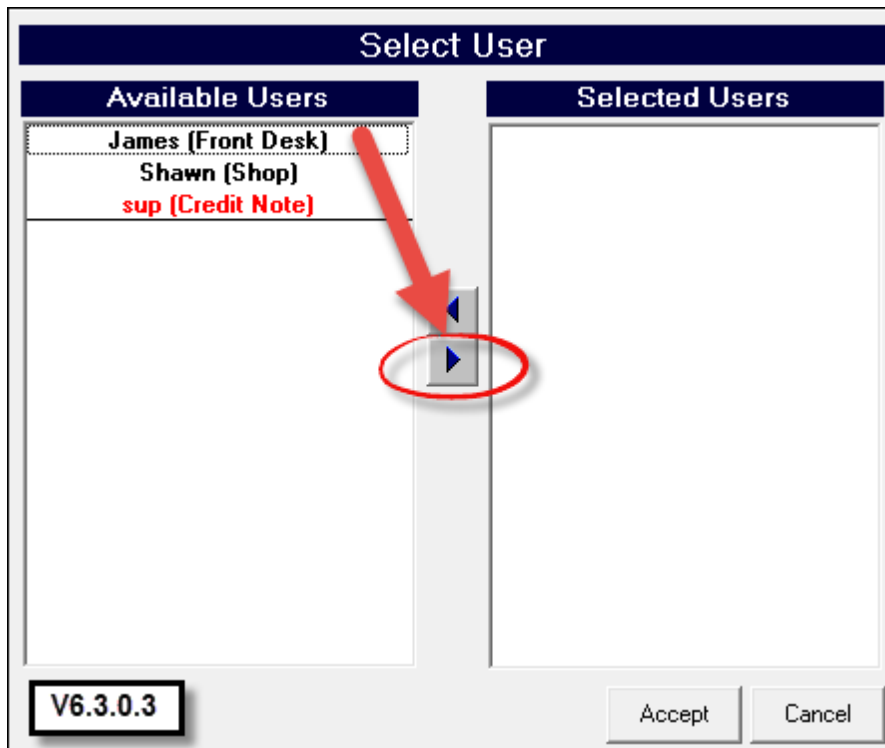
## 9 Step 9 - Opening a Shift

- It is important to know that transactions can only be done when the Supervisor has opened a shift for the User on duty. For Container Hire, a "Shift" must be open when raising and receiving Deposits, as well as receiving Account Payments.
- Novtel Equipment Hire incorporates an entire shift opening and cash-up procedure function. What this means, is that the "**Cash-up Supervisor**" will log on using his / her password, and open shifts for each of the other users for each day
- The receptionist, for example, may then log on and do transactions throughout the day, and at the end of the day, the day's takings must correspond with the transactions done in Novtel. The supervisor then double checks that the money count is correct, and also that there were no mistakes made in any transactions
- This is a very powerful and safe way of checking that your business' daily takings are handled correctly
- Cash-up supervisors are able to see exactly how much money was taken - and exactly which transactions were done - for each employee during the day
- Once you have created your "**Cash-up Supervisor**" (Setup - Users / Passwords), you will need to log on as the supervisor (File menu - Log Off)

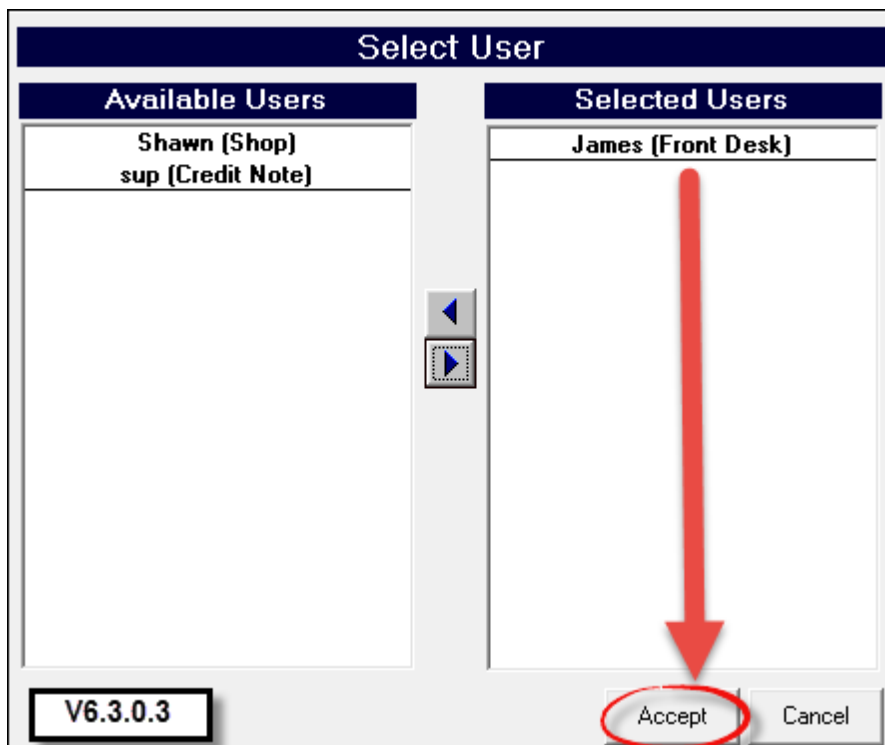
How to open a shift:

- Click on "**Supervisor Open Shift**"

- Select the "User" whose shift is to be opened and click on the arrow pointing to the right



- The "User" will now be displayed in the right hand block under "Selected Users". Should more "Shifts" be opened, select the "User"; move them to the right and click "Accept"



- Now you can "Close" the window, and the "User" can Log On for his/her shift

Supervisor Shift Cashup V6.3.0.3

File Reports Credit Note

View Location: All

Supervisor sup Shift # SUP00001

Transaction	Shift

Batch Shift  Single Shift

Shift Total: 0.00

Print to: Screen Print

Novtel Equipment Hire

Enter Password

Change Password



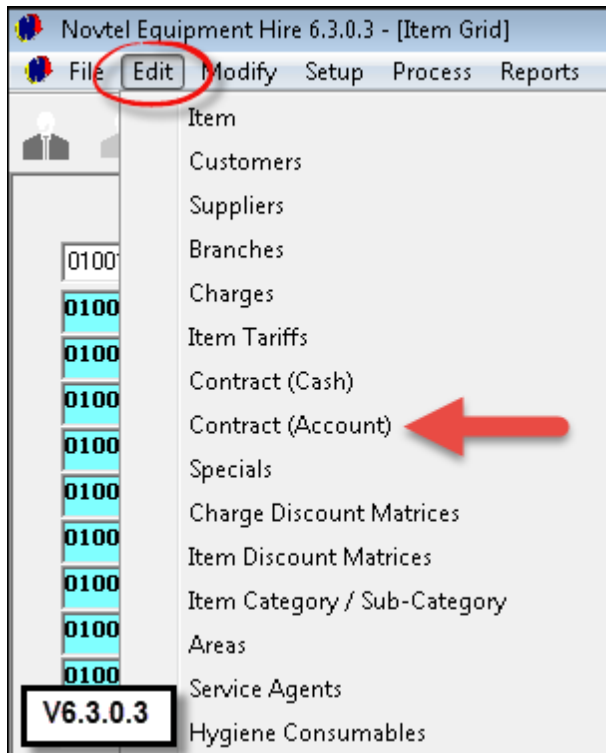
## 10 Step 10 - Creating Contracts

There are two types of contracts to be created:

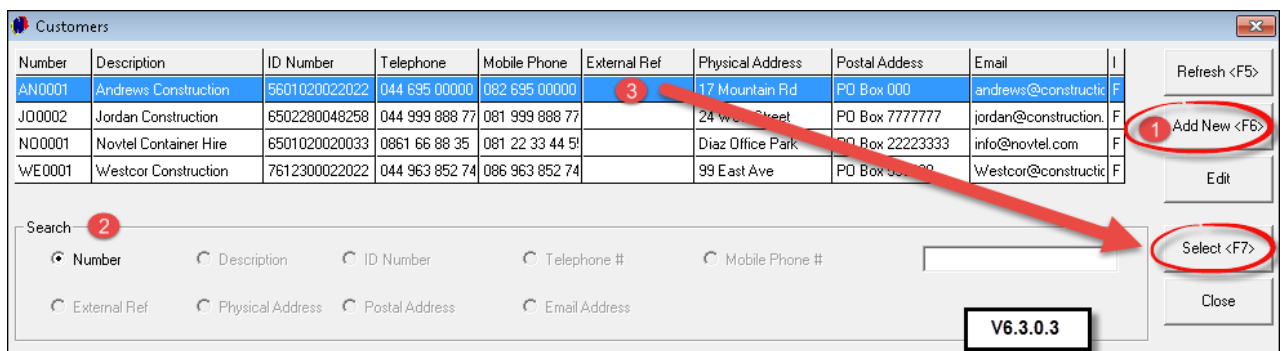
- Cash Contracts ("**Edit - Contract Cash**"). These contracts are for private Customers, paying on the spot for the Container Rental
- Account Contracts ("**Edit - Contract - Account**"). These Customers are allowed to have an outstanding balance when Containers have been returned

We are going to create an "**Account Contract**". Please note that both the types of contracts are done in the same manner

- Click on "**Edit - Contract (Account)**"



1. To create a contract for a new Customer, click on "**Add New**", and follow the steps in "**Edit - Customer**". As soon as the customer has been created, the "**Contract Screen**" will open for the contract to be created.
2. In order to create a contract for an existing customer, click on any of the search options for the "**Account Customers**" window to open
3. Click on the Customer, and then on "**Select**"



- Novtel Equipment Hire incorporates an ID Checker, and it will alert you if the ID number is not valid, by displaying "False" in red letters. If the ID is not valid, the system will not allow you to create a contract. First rectify the ID before continuing

ACCOUNT CUSTOMER V6.3.0.3

Account Code: AN0001  Corporate Customer  Billing Interval: On Month End 0

External Account Ref:   Monthly Container Hire

Description: Andrews Construction  Order Number Required

Customer Category: 02 - Monthly  Use Item Tariff Prices

**General** | Site Details | Contract Details | User Defined Fields | Private Customer

Postal Address: PO Box 000, Mossel Bay, 6000

Physical Address: 17 Mountain Rd, Mossel Bay, 6000

Company Name:

Last Name: Andrews, First Name: Shawn, Title: Mr, Initials: S

Date of Birth: 1956/01/02, M/F: M

ID Number: 5601020022022, RSA ID:

Company Reg No: 123456, Telephone No: 044 695 00000, Fax No: 044 695 00000, Mobile Phone: 082 695 00000, AH Telephone: , Email Address: andrews@construction.c, Search Number: 5601020022022, Contact Person: Shawn

Block Customer Account:

Account Balance: 0.00, On Rent Total: 0.00, Total Due: 0.00, Available Credit: 0.00

Buttons: Provisional Customer Statement, Pastel Customer Statement, Accept, Cancel

- Click on the "Site Details" tab. The "Site" is the physical address where the Container will be stored, and will normally not be the same as the Customer's physical address
- Click on "Add" in order to create a new "Site" (Please note that there is no restriction on the number of "Sites" to be added)

ACCOUNT CUSTOMER V6.3.0.3

Account Code: AN0001  Corporate Customer  Billing Interval: On Month End 0

External Account Ref:   Monthly Container Hire

Description: Andrews Construction  Order Number Required

Customer Category: 02 - Monthly  Use Item Tariff Prices

General | **1 Site Details** | Contract Details | User Defined Fields | Private Customer

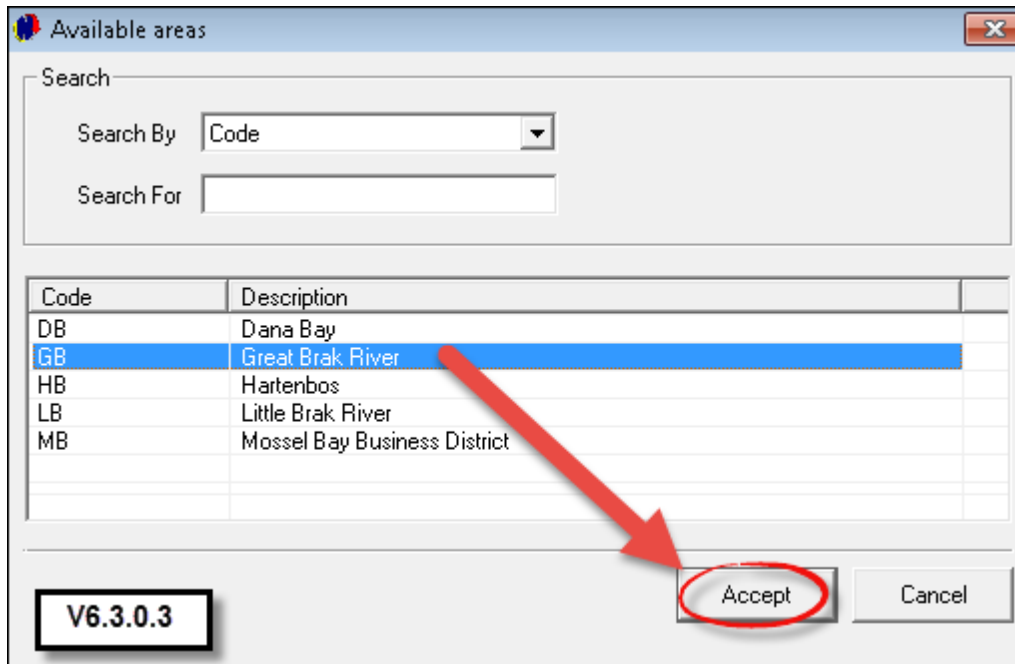
ID	Site	Contact	Mobile	Site #
AN0001/001	17 Mountain Rd		082 695 00000	001

**2 Add** | Edit | Delete | New Contract

Account Balance: 0.00, On Rent Total: 0.00, Total Due: 0.00, Available Credit: 0.00

Buttons: Provisional Customer Statement, Pastel Customer Statement, Accept, Cancel

- Click on the magnifying glass next to "Area Code" in order to open the window containing all "Areas" as set up in Step 8



1. Enter the "Site Description"
2. GPS Co-ordinates can be entered if necessary
3. Enter the "Contact Person's" name
4. The mobile number of the contact person must be entered
5. The contact person's e-mail address is entered here for on-sit e-mail communication
6. Enter the Site's Address as the "Delivery Address"
7. Click "Accept" to save the "Site"

**Add Delivery Address**

Site Code:  Service Sequence: 0

Customer Code: AN0001 Andrews Construction

Area Code: GB Great Brak River

Site Number/ Code:

Site Description: 1 New Development in GBR Hights

GPS (N/S): 2 -000.000000 Format As: -031.123564

GPS (E/W): -000.000000 Format As: -031.123564

Contact Person: 3 Graham

Telephone:

Mobile Phone: 082 123 456 789 4

Fax Number:

Email Address: 5 graham@ac.co.za

Delivery Address: 6  
Crystal Close  
Great Brak River Heights  
6300

V6.3.0.3

7 Accept Cancel

- Click on the newly created "Site", and then on "New Contract"

**ACCOUNT CUSTOMER** V6.3.0.3

Account Code: AN0001

External Account Ref:

Description: Andrews Construction

Customer Category: 02 - Monthly

Corporate Customer

Monthly Container Hire

Billing Interval: On Month End 0

Order Number Required

Use Item Tariff Prices

General		Site Details		Contract Details		User Defined Fields	Private Customer
ID	Site	Contact	Mobile	Site #			
AN0001/001	17 Mountain Rd		082 695 00000	001			
AN0001/002	New Development in GBR Hights	Graham	082 123 456 789	002			

Add Edit Delete

New Contract

Account Balance: 0.00 On Rent Total: 0.00 Total Due: 0.00 Available Credit: 0.00

Provisional Customer Statement Pastel Customer Statement Accept Cancel

- See how this contract displays "**Account Customer**" in bold letters (Remember that in order for the "**Customer**" to be classified as an "**Account Customer**", the "**Corporate Customer**" check-box is ticked as shown in the previous screen shot)
- Select whether the customer are collecting the Container, or if it is to be delivered to the site (It is normally delivered)
- Select the start and end dates for the contract (Please note that we have selected the entire month of February, but the current date is the 9th. You will see how the system automatically adjust the rental period and price in order to accommodate the date change, and not to bill the Customer for an entire month if the month has progressed)
- The "**Contract Status**" is "**Provisional**" at present, since no deposit has been raised as of yet. (Deposits are not normally required for "**Account Contracts**" - This is mostly for "**Cash Contracts**", and deposits can be raised and received directly from the "**Deposit**" tab. Please register on Novtel's Forum for more information on the subject at <http://www.novtel.com/forum/index.php>)
- Enter the order number supplied by the customer - should it be relevant
- Set the discount percentage - if any
- Should you make use of agents, click on the magnifying glass in order to browse for, and select the relevant agent

Contract Details

Contract Volume #: New Volume 20150209 Contract Number: [ ]

Customer Code: AN0001 Andrews Construction Monthly

Site Number: AN0001/002 New Development in GBR Hights Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai Monthly Container Hire

General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View Financial

Invoice Number: [ ] **ACCOUNT CUSTOMER**

Credit Note Number: [ ]

Deliver/Collect (Default): Deliver

Start Date: 2015/02/01 End Date: 2015/02/28

Order Number: [ ]

Contract Status: Provisional

Container Number: 0

Discount %: 0 Fixed Day Limit Rate: Default

Agent Code: [ ]

Description: [ ]

Cancel Contract

V6.3.0.3

Reports to: Screen Print POS Print to: Screen Print

Save Cancel Refund Charge Contract Summary Delivery Note Return Note Close

The "Hire Item" tab:

1. VERY IMPORTANT: Select "Monthly Container Hire"
2. If the above mentioned tick is not selected, you will not be able to see the Containers in the "Available Items" window when you click "Add New" in the "Hire Item" tab

Contract Details

Contract Volume # 1 20150209 Contract Number: 1  
 Customer Code : AN0001 Andrews Construction Monthly  
 Site Number : AN0001/002 New Development in GBR Hights Last Increment Date : 2015/02/28  
 Branch Mossel Bay, Voorbaai Monthly Container Hire

General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View Financial

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	HDA	HD	Rate PH	Hours
1	ZGF00...	Deposit - 0.00		0.00	0.00	N	Provisio...	Deliver	0	0	0	0.00	0	0.00	28.00	0.00	0.00

Display <F1> Add New <F3> Remove <F4> Hire Item Select All <F5> Select None <F6> Move Contract <F7> <HC>  
 On Rent <F8> Deliver/Collect <F9> Return <F10> Apply Selection <F2> Rain Day/Off Hire <F11> Amend Contract Cancel Item

V6.3.0.3 Reports to : Screen Print POS Print to : Screen Print  
 Save Cancel Refund Charge Contract Summary Delivery Note Return Note Close

- Click on the correct Container, and then "Accept" in order to insert it

Available Items

Search  
 Search By Code  
 Search For

Code	Plant No	Description	Maintenance Due
01001001	1	Container 1 - 6 Meter Steel, C Factory, 1	No
01002001	2	Container 2 - 6 Meter Steel, C Factory, 2	No
01003001	3	Container 3 - 6 Meter Steel, C Factory, 3	No
01004001	4	Container 4 - 6 Meter Steel, C Factory, 4	No
01005001	5	Container 5 - 6 Meter Steel, C Factory, 5	No
01006001	6	Container 6 - 12 Meter Steel, C Factory, 6	No
01007001	7	Container 7 - 12 Meter Steel, C Factory, 7	No
01008001	8	Container 8 - 12 Meter Steel, C Factory, 8	No
01009001	9	Container 9 - 12 Meter Steel, C Factory, 9	No
01010001	10	Container 10 - 12 Meter Steel, C Factory, 10	No

V6.3.0.3 Accept Cancel

- If the Container is being delivered to the "Site" immediately, click "On Rent", and then "Apply Action"

**Contract Details**

Contract Volume #: 1      20150209      **Contract Number:** 1

Customer Code: AN0001      Andrews Construction      Monthly

Site Number: AN0001/002      New Development in GBR Hights      Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai      **Monthly Container Hire**

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
<input checked="" type="checkbox"/>	1	ZGR00... Deposit - 0.00		0.00	0.00	N	Provisio...	Deliver	0	0	0	0.00	0	0	0.00	28.00	0.00	0.00
<input checked="" type="checkbox"/>	2	01001001 Container 1 - 6 Meter Steel...		0.00	0.00	N	Provisio...	Deliver	1	1	0	0.00	0	0	0.00	19.00	0.00	0.00

V6.3.0.3      Reports to: Screen Print      POS Print to: Screen Print

- The following window will pop up, containing the information as follows:
- The First Month's rent is calculated automatic as 19 days, since it is the 9th of the month already (As previously mentioned)
  - The Monthly Fixed Rent is the full rate as entered by you when the "Item Sub-Category" was created
  - Click "Accept"

On Rent Date

1 -- Container 1 - 6 Meter Steel, C Factory, 1

Container Item Details	
Container per Day Incl.	71.43
Container Rent TAX	8.77
Container per Day Excl.	62.66

Fixed Monthly Rent

Hire days First Month	19
-----------------------	----

First Month Rent Incl.	1357.14
First Month Rent TAX	166.67
First Month Rent Excl.	1190.47
Monthly Fixed Rent	2000.00
Month Fixed Rent TAX	245.61
Monthly Fixed Rent Excl.	1754.39

Notes

22

Accept

Cross Hire Rent

Cancel



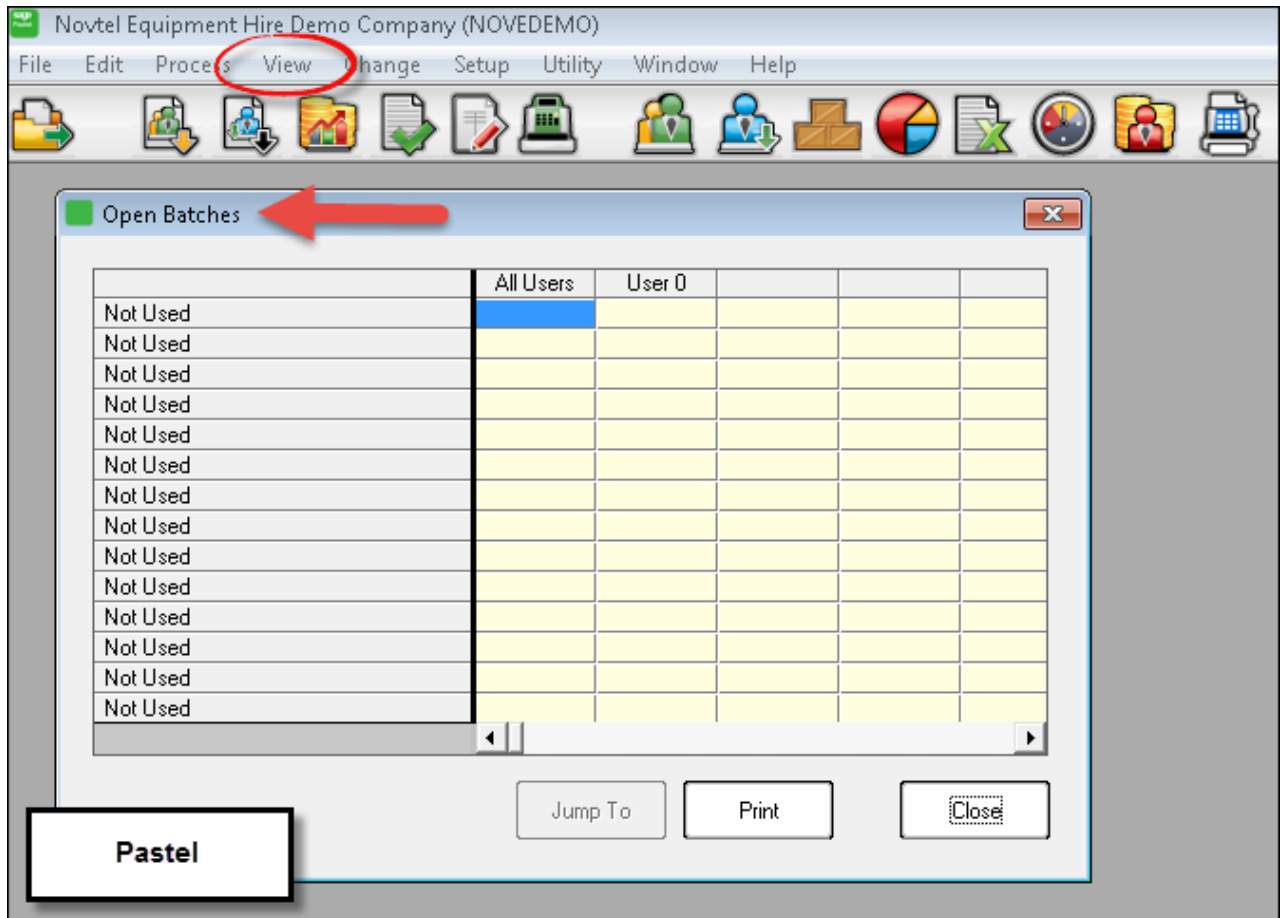
- Click "Save" to finalize the contract

- The Contract now displays on the Grid - from the 9th until the 28th of February, and in the color of the "On Rent" status
- In front of the Contract is the letter "M" - meaning that it is a "Monthly Contract"

- Please remember that one "Corporate Customer" may have a few "Sites", and Containers can be rented for the different "Sites", simply by adding those "Sites" to the "Customer", and linking the Container to the "Site" as explained above. The Grid will then display as follow:

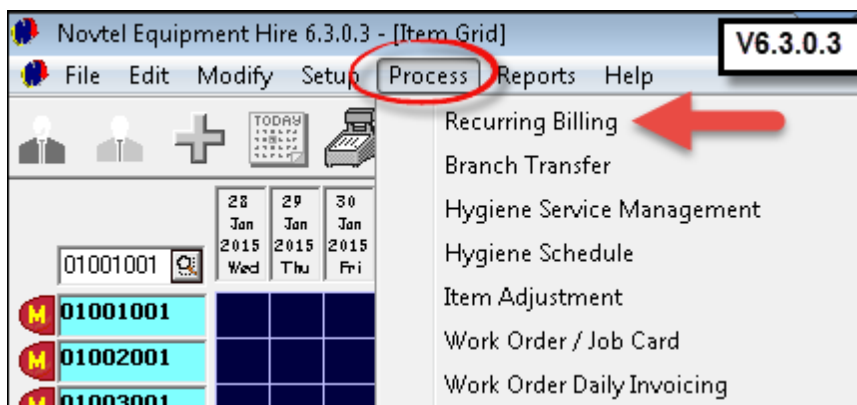
## 11 Step 11 - Recurring Billing

When using the Pastel Interface, open Pastel and click on "View - Open Batches", and make sure there are no open batches



Containers are rented on a monthly basis, and the billing is done in Novtel as follow:

- Click on "Process - Recurring Billing"



- Select the "Process Monthly Contracts" tab
  1. Check that the "Branch" which this container is rented from, is correct
  2. Select the correct day and month for the billing to be done
  3. Click on "Select All" if you want to process all of the contracts simultaneously. (Alternatively, if you only want to do the billing for a specific contract, click on "Select None", and then tick the check-box next to the contract to be billed)
  4. Click on "Process Monthly Contracts"

Recurring Billing

Branch Mossel Bay, Voorbaai Day 28 Month February Year 2015

Daily Duration Increment Updated Customer Invoices **Process Monthly Contracts**

Hire #	Contract	CVol	Customer	Customer Description	Item Code	Status
<input checked="" type="checkbox"/> 2	1	1	AN0001	Andrews Construction	01001001	On Rent
<input checked="" type="checkbox"/> 1	1	1	AN0001	Andrews Construction	ZGR00001	On Rent
<input checked="" type="checkbox"/> 4	2	2	AN0001	Andrews Construction	01002001	On Rent
<input checked="" type="checkbox"/> 3	2	2	AN0001	Andrews Construction	ZGR00001	On Rent
<input checked="" type="checkbox"/> 6	3	3	AN0001	Andrews Construction	01003001	On Rent
<input checked="" type="checkbox"/> 5	3	3	AN0001	Andrews Construction	ZGR00001	On Rent
<input checked="" type="checkbox"/> 8	4	4	JO0002	Jordan Construction	01004001	On Rent
<input checked="" type="checkbox"/> 7	4	4	JO0002	Jordan Construction	ZGR00001	On Rent

**3** Select All Select None **4** Process Monthly Contracts Contract

Show Plant Number   
Monthly Fixed Rate Price Increase

V6.3.0.3 Close

Print to : Screen Print Suppress Continue Dialog

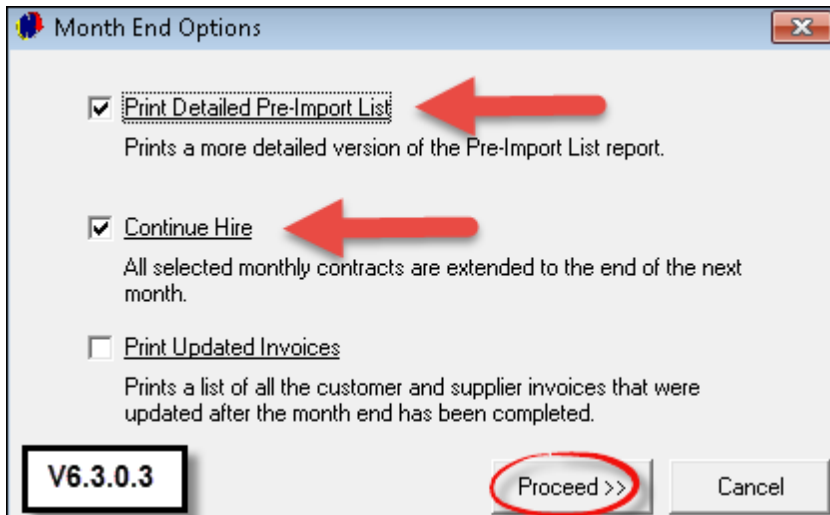
There are option selections to be made in the "Month End Options" window:

➤ **Print Detailed Pre-Import List**

➤ **Continue Hire** - When this option is selected, the system will automatically reserve the Container for the customer for the next month, and the rental continues. If there are customers that will be returning the Container at the end of the current month, they must be billed separately, and this check-box must be un-ticked.

➤ **Print Updated Invoices** - This option will automatically have the system print a list of all updated invoices, and you can keep this for your own records

- Click "Proceed"



- The "Pre-Import List" will be generated in HTML format, and minimized to your internet browser. Remember that the contracts did not run from the first of the month. It has not been billed for a full month - only partially. The billing for March will be the full amount.

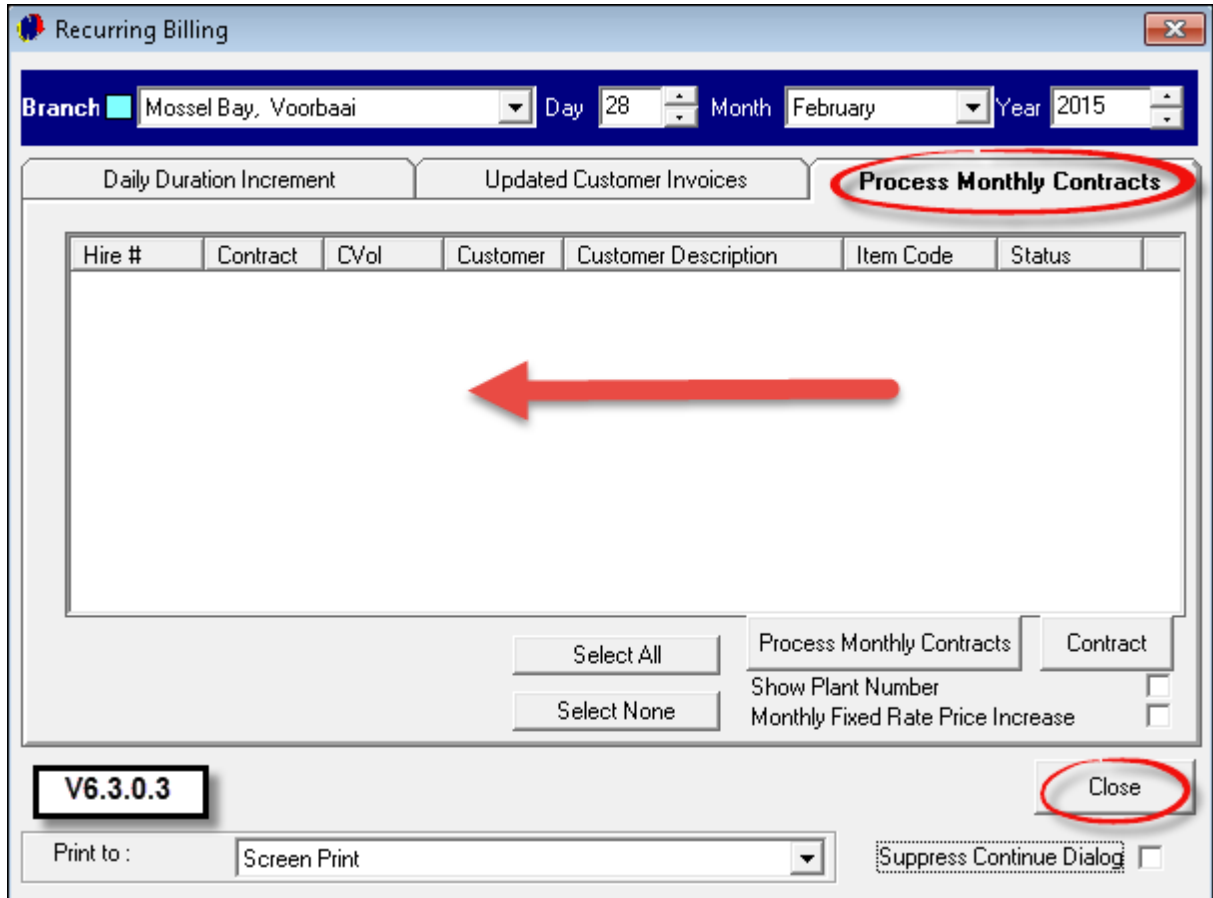
**Pre-Import List For February 2015**

PRINTED DATE: 18 FEBRUARY 2015 TIME: 09:59:47 AM

**CUSTOMER INVOICES**

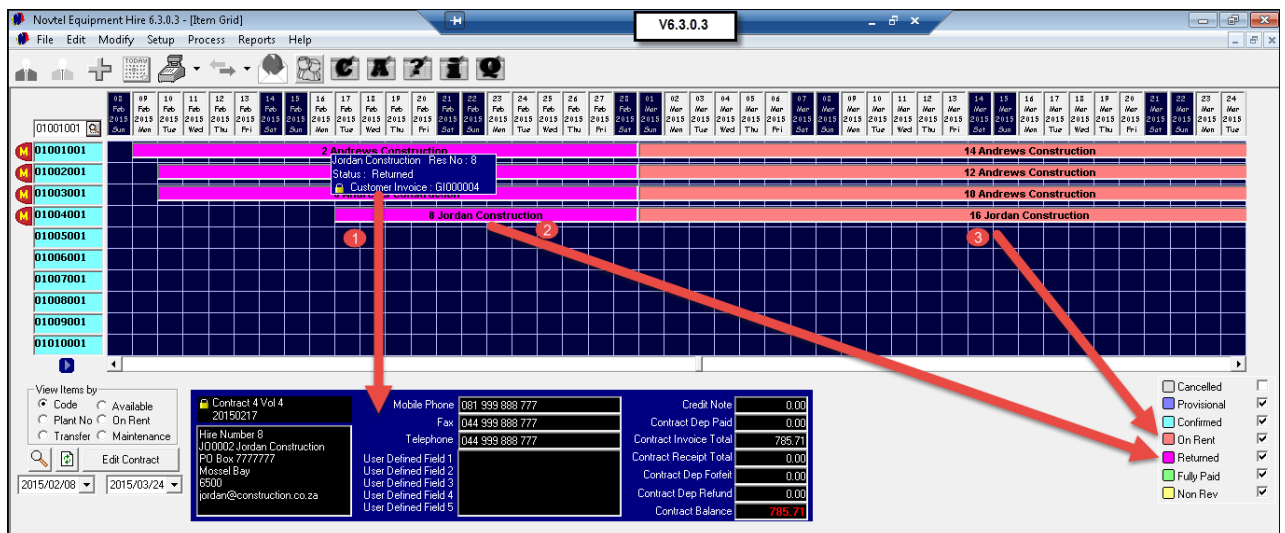
CONTRACT	VOLUME	CUSTOMER	EXCL TOTAL	TAX	INCL TOTAL
3	3	AN0001 - Andrews Construction	1127.82	157.89	1285.71
2	2	AN0001 - Andrews Construction	1127.82	157.89	1285.71
1	1	AN0001 - Andrews Construction	1190.47	166.67	1357.14
4	4	JO0002 - Jordan Construction	689.22	96.49	785.71
<b>NUMBER OF INVOICES TO BE UPDATED - 4</b>			<b>TOTALS</b>	<b>4135.32</b>	<b>578.95</b>
					<b>4714.27</b>

- The "Process Monthly Contracts" tab are now cleared of contracts for February and the billing is done. Click on "Close"



➤ Returning to the Grid, you will notice the following:

1. When the mouse is moved over any of the February contracts, an Invoice Number is connected to the contract, and the information for that contract is displayed in the blue and black blocks at the bottom of the screen
2. The color of the February contracts have changed to dark pink - the color of the "Returned" status
3. The March Contracts are now displaying on the Grid, in the color of the "On Rent" status



- When you right-click on any of the "Returned" contracts on the grid - and open the contract - you will not be able to "Edit" it. You will only be allowed to receive payments on it

Novtel Equipment Hire 6.3.0.3 - [Item Grid] V6.3.0.3

File Edit Modify Setup Process Reports Help

08 Feb 2015 Sun 09 Feb 2015 Mon 10 Feb 2015 Tue 11 Feb 2015 Wed 12 Feb 2015 Thu 13 Feb 2015 Fri 14 Feb 2015 Sat 15 Feb 2015 Sun 16 Feb 2015 Mon 17 Feb 2015 Tue 18 Feb 2015 Wed 19 Feb 2015 Thu 20 Feb 2015 Fri 21 Feb 2015 Sat 22 Feb 2015 Sun 23 Feb 2015 Mon 24 Feb 2015 Tue 25 Feb 2015 Wed 26 Feb 2015 Thu 27 Feb 2015 Fri 28 Feb 2015 Sat 01 Mar 2015 Sun 02 Mar 2015 Mon 03 Mar 2015 Tue 04 Mar 2015 Wed

01001001

01001001 2 Andrews Construction

01002001 4 Jordan Construction Res No: 8

01003001 6 Customer Invoice: GI000004

01004001 8 Jordan Construction

01005001

01006001

01007001

01008001

View Details <F5>

Contract View Contract Details

Documents

Contract Details

Contract Volume # 4 20150217 Contract Number: 4

Customer Code: JO0002 Jordan Construction No Category

Site Number: JO0002/001 23 Paul Street Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai Monthly Container Hire

General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View Financial

Invoice Number: GI000004 ACCOUNT CUSTOMER

Credit Note Number:

Deliver/Collect (Default): Deliver

Month: February Year: 2015

Start Date: 2015/02/17 End Date: 2015/02/28

Order Number: 1234

Contract Status: Returned

Container Number: 7

Discount %: 0 Fixed Day Limit Rate: Default

Agent Code

Description

V6.3.0.3

Reports to: Screen Print POS Print to: Screen Print

Refund Charge Invoice Contract Summary Delivery Note Return Note Close

✗ Edit Credit Note

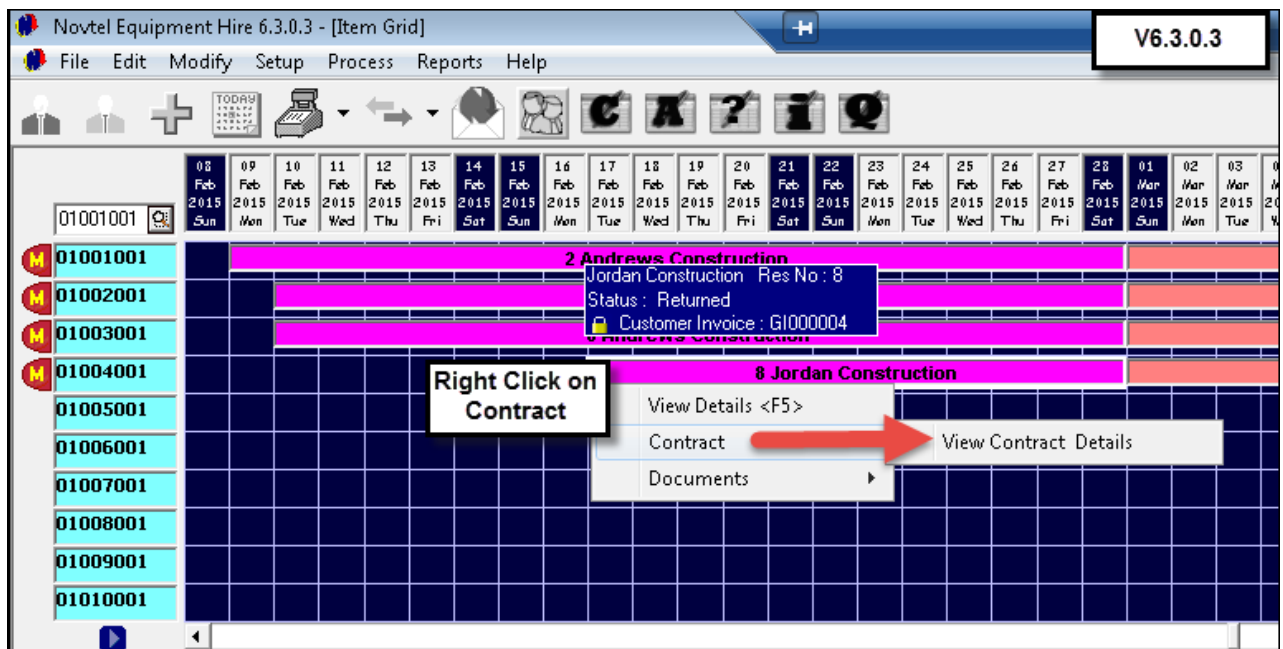
## 12 Step 12 - Receiving Payments

There are two ways in which contract payments can be received:

- Option 1: Directly on the contract in the "Payment" tab
- Option 2: Through Point of Sale

### Option 1

- Right click on the applicable contract on the Grid, and select "Contract - View Contract Details"



- Click on the "Payment" tab of the contract. The "Payment Due" amount will be displayed in red
- Click on "Contract Payment"

Contract Details

Contract Volume #: 4 20150217 Contract Number: 4

Customer Code: J00002 Jordan Construction No Category

Site Number: J00002/001 23 Paul Street Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai Monthly Container Hire

General Hire Item Non-Serial Non-Rentals Deposits **Payment** Detail View Financial

Code	Description	Dur	Qty	Tax	Inclusive
01004001	Container 4 - 6 Meter Steel, C Factory...	11	1	96.49	785.71
-	Additional Costs			0.00	0.00

DEPOSIT PAID: 0.00 CREDIT NOTE: 0.00

INVOICE TOTAL: 785.71 C N REFUND: 0.00

RECEIPT TOTAL: 0.00 Recalculate Totals

DEPOSIT REFUND: 0.00 Refund Deposit

DEPOSIT FORFEIT: 0.00 Refund Due

PAYMENT DUE: 785.71 Contract Payment

V6.3.0.3 Edit Credit Note Refund Charge Invoice Contract Summary Delivery Note Return Note Close

Reports to: Screen Print POS Print to: Screen Print



When the "Contract Payment" window opens, see how the "Contract Volume"; "Customer Description" and the "Payment Due" amount has been entered automatically.

1. Select the "Payment Type"
2. Enter the date when payment was received
3. Enter the amount that was received
4. Click "Accept"

The screenshot shows the 'Contract Payments' window. On the left, a table titled 'Selected Item(s):' contains one entry:

Code	Description	Dur	Qty	Tax	Inclusive
01004...	Container 4 - 6 Meter St...	11	1	96.49	785.71

On the right, the 'History' section shows 'Contract Vol Number' as 4 and 'Customer Description' as 'J00002 - Jordan Construction'. The 'Payment Type' dropdown is set to 'Cash' with a date of '2015/02/18'. The 'Status Returned' section shows 'Payment Received' as 785.71 and 'Change' as 0.00. A large 'PAYMENT DUE' box displays '785.71' with a green checkmark. At the bottom, the 'Print to:' dropdown is set to 'Screen Print', the user is 'James' with shift 'SFT00001', and the '<F2> - Accept' button is circled in red. A version box shows 'V6.3.0.3' and a 'Close' button is present.

- The receipt will now be displayed, and can be printed

**Novtel Container Hire**

Diaz Park  
Diaz Boulevard  
Mossel Bay  
6800

Tel: 0861 66 8835  
Fax: 0861 66 8835  
VAT :123456789

---

RECEIPT

---

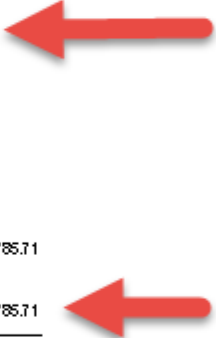
Cost Description : Jordan Construction  
Cost Code : J00002  
Contract Vol : 4  
Payment Type : Cash

Payment Due : 785.71  
Payment Received : 785.71  
Change : 0.00

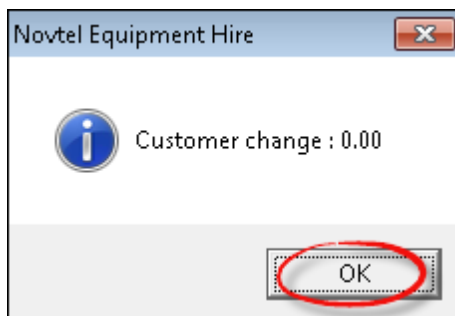
Staffmember : James  
Payment Date : 2015/02/18  
Print Date : 2015/02/18  
Time : 12:36:00 PM  
Shift Number : SFT00001  
Receipt Number : REC00001

---

Thank You.



- As soon as the "Receipt" window is closed, the "Customer Change" window will appear with the amount of change that is due. Click "OK".



- The payment will be reflected in the **"Payment"** tab, and the **"Payment Due"** amount - if paid in full - will display in green
- Click **"Save"**

**Contract Details**

Contract Volume #: 4    20150217    Contract Number: 4

Customer Code: JO0002    Jordan Construction    No Category

Site Number: JO0002/001    23 Paul Street    Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai    Monthly Container Hire

General   Hire Item   Non-Serial   Non-Rentals   Deposits   **Payment**   Detail View   Financial

Code	Description	Dur	Qty	Tax	Inclusive
01004001	Container 4 - 6 Meter Steel, C Factory...	11	1	96.49	785.71
-	Additional Costs			0.00	0.00
-	Payments Made				-785.71

V6.3.0.3

DEPOSIT PAID: 0.00    CREDIT NOTE: 0.00

INVOICE TOTAL: 785.71    C N REFUND: 0.00

RECEIPT TOTAL: 785.71    Recalculate Totals

DEPOSIT REFUND: 0.00    Refund Deposit

DEPOSIT FORFEIT: 0.00    Refund Due

PAYMENT DUE: 0.00    Contract Payment

Reports to: Screen Print    POS Print to: Screen Print

**Save**   Cancel   Refund Charge   Contract   Summary   Delivery Note   Return Note   Close

- For demonstration purposes, the **"Financial"** tab will reflect the Receipt number; Amount paid, and the time and date the transaction was done

**Contract Details**

Contract Volume #: 4    20150217    Contract Number: 4

Customer Code: JO0002    Jordan Construction    No Category

Site Number: JO0002/001    23 Paul Street    Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai    Monthly Container Hire

General   Hire Item   Non-Serial   Non-Rentals   Deposits   Payment   Detail View   **Financial**

Document Num	Amount	Transaction	Time Stamp
REC00001	785.71	Payment	2015/02/18 12:35:58 PM

Reports to: Screen Print    POS Print to: Screen Print

Save   Cancel   Refund Charge   Contract   Summary   Delivery Note   Return Note   Close

- In the "Detailed View" tab, the "Invoice/Credit Note History" of all transactions can be viewed for this Customer

Contract Details

Contract Volume #: 4    20150217    Contract Number: 4

Customer Code: JO0002    Jordan Construction    No Category

Site Number: JO0002/001    23 Paul Street    Last Increment Date: 2015/02/28

Branch: Mossel Bay, Voorbaai    Monthly Container Hire

General    Hire Item    Non-Serial    Non-Rentals    Deposits    Payment    **Detail View**    Financial

POS Purchases     Invoice/Credit Note History     Non-Serial (LCHV)  
 Hygiene Service     Rain Days     Plant

Transaction #	Date	Document #	Invoice #	Shift #	Department	Inclusive
4	2015/02/18	GI000004	GI000004	SFT00001	Invoice	785.71

Display    Refresh    Click on Column Header to sort. Double Click on line to display Transaction.

Reports to: Screen Print    POS Print to: Screen Print

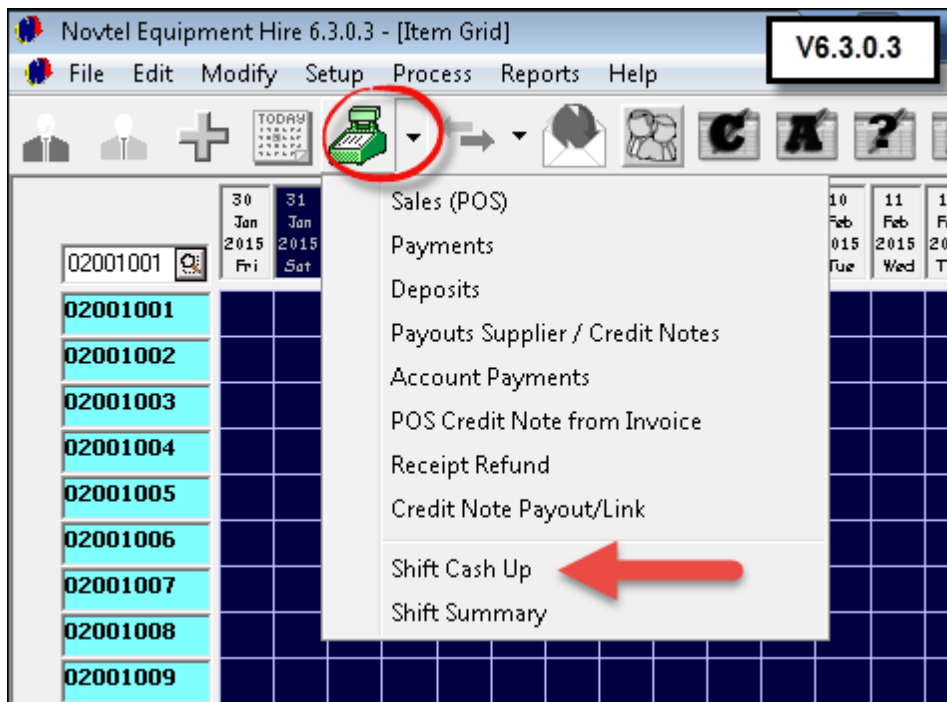
Save    Cancel    Refund Charge    Contract    Summary    Delivery Note    Return Note    Close

As mentioned earlier, there are two ways in which payments can be received. For the second option, please register on Novtel's Forum at <http://www.novtel.com/forum/index.php>, and select <http://www.novtel.com/forum/index.php?board=1164.0>

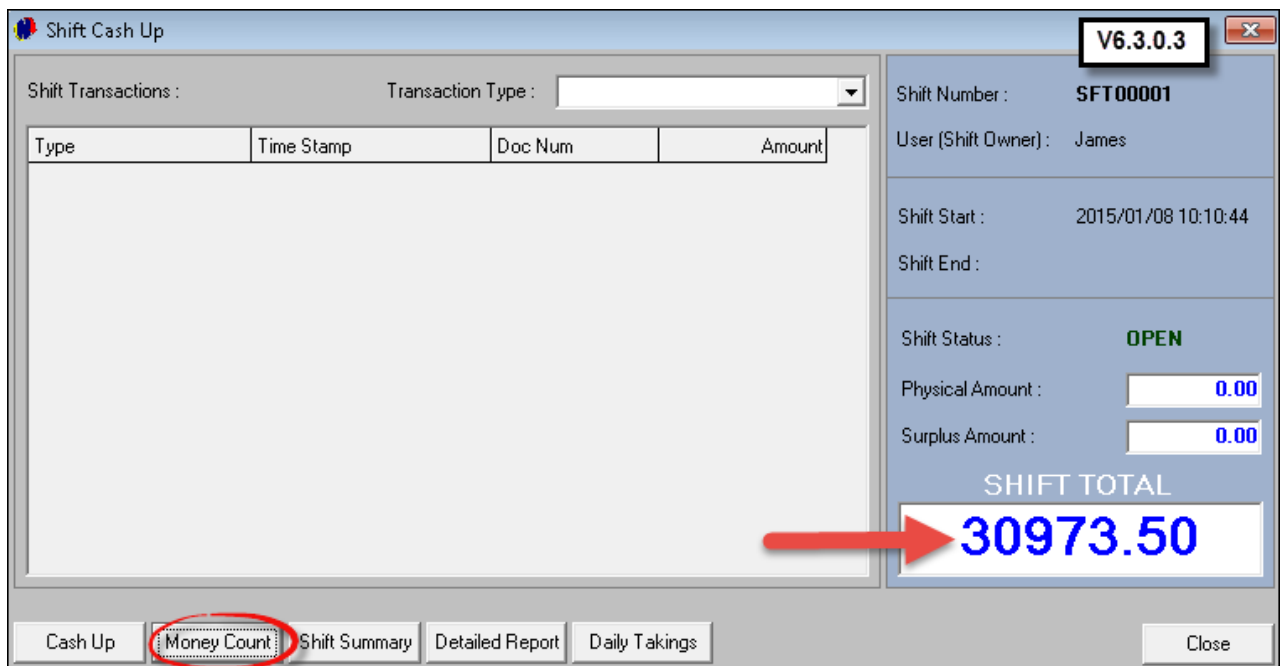
## 13 Step 13 - Shift Cash Up

In order for the "Shift Cash-Up" to be completed successfully, the following is of utmost importance:

- If Novtel is integrated with Pastel, all accounts in the "Setup - Interface" tabs must have been entered
- As explained in "Step 7 - Creating Items", all "Items" must be linked to a "Pastel Inventory Code"
- Click on the arrow next to the Point of Sale Icon, and click on "Shift Cash Up"



- Click on the "Money Count" tab



1. Enter the number of notes and coins counted - not the amount. The system will automatically calculate the cash total. Please note that **ONLY** payments received via "**Point of Sale**", will be indicated as the "**Physical**" total. Also remember to enter the Credit Card; Cheque and Bank Transfer Totals if received in "**Point of Sale**"
2. Enter the amount for the float kept in the till
3. The system will indicate if there is a "**Surplus**" amount (In blue), or a "**Shortage**" (It will be printed in red)
4. The amount next to "**Other Total**", is "**Contract Payments**" received directly on the contract - as explained in Step 12
5. In order to print a Shift Report, click on the "**Report**" tab
6. When the "**Screen Capture**" button is clicked, an exact image of the "**Money Count**" can be printed
7. Click "**Accept**"

**Money Count**

200.00	52	0.50	6	Cash :	18325.25
100.00	70	0.25	0	Cheque :	0.00
50.00	15	0.20	1	Credit Card :	0.00
20.00	5	0.10	0	Bank Transfer :	0.00
10.00	5	0.05	1	Vouchers :	0.00
5.00	3	0.02	0	Other :	0.00
2.00	2	0.01	0	Total :	18325.25
1.00	3			- Float :	400.00
				Physical :	17925.25
				<b>Surplus :</b>	<b>0.00</b>
Comments :				Shift Total Cash :	17925.25
				Account Total :	0.00
				Maintenance Clear :	0.00
				Internal Maintenance :	0.00
				Other Total :	13048.25
				Shift Total :	30973.50

V6.3.0.3

Report    Screen Capture    Accept    Cancel

Print to : Screen Print

➤ The buttons below will enable you to print the following reports:

- Shift Summary Report
- Detailed Report
- Daily Takings Report

- See how the Shift is still "**Open**". Also notice that the "**Shift Total**" is R30 973.50, but the "**Physical Amount**" is R17 925.25 (Received via POS). There is no "**Surplus Amount**".
- Click on "**Cash-Up**"

- The Shift for James is now "Closed"
- Click on "Close" to exit the window

Shift Cash Up

Shift Transactions : Transaction Type :

Type	Time Stamp	Doc Num	Amount
------	------------	---------	--------

V6.3.0.3

Shift Number : **SFT00001**

User (Shift Owner) : James

Shift Start : 2015/01/08 10:10:44

Shift End : 2015/02/19 11:04:32

Shift Status : **CLOSED**

Physical Amount : **17925.25**

Surplus Amount : **0.00**

**SHIFT TOTAL**

**30973.50**

Cash Up Money Count Shift Summary Detailed Report Daily Takings

Close



- The "User" must log out, and the "Supervisor" must now log in with his or her password
- Click on the "User's" Shift and see how all of the transactions done during that shift, displays in the left hand side of the window
- Click on "Supervisor Shift Cash-Up"

Supervisor Shift Cashup V6.3.0.3

File Reports Credit Note

View Location: All Supervisor Supervisor Shift # SUP00001

Transaction (SFT00001)				Shift			
ID	Customer	Type	Total	Shift #	User	Total	Invoice Date
1		Sales	277.00				
2	BL0001	Deposit Paid	100.00	SFT00001	James	30973.50	2015/02/19
3	CA0001	Deposit Paid	100.00	SFT00002	James	0.00	
4	ES0001	Deposit Paid	100.00				
5	CA0001	Payment	231.25				
6	CA0001	Contract Invoice	288.75				
7	CA0001	Deposit Applied	100.00				
8	CA0001	Contract Credit Note	-42.50				
9	CA0001	Refund Cash	-85.00				
10	ES0001	Payment	100.00				
11	ES0001	Deposit Applied	100.00				
12	ES0001	Contract Invoice	200.00				
13	BL0001	Payment	324.00				
14	BL0001	Deposit Applied	100.00				
15	BL0001	Payment	40.00				
16	BL0001	Contract Invoice	464.00				
17	BL0001	Deposit Paid	200.00				
18	BL0001	Deposit Refunded	-75.00				
19	BL0001	Deposit Applied	125.00				
20	BL0001	Contract Invoice	125.00				

Batch Shift Single Shift

Open Shift Total: 30973.50

Check Customer Integrity Supervisor Edit Shift Supervisor Shift Cashup Close

Print to: Screen Print

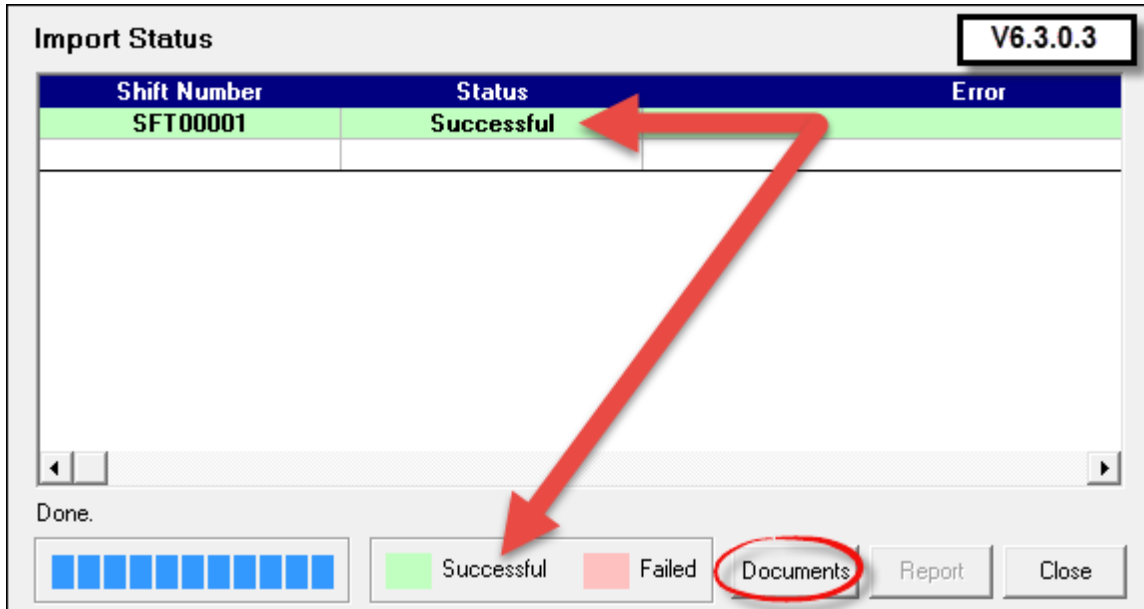
- Click "Yes" to continue the Cash-Up

Novtel V6.3.0.3

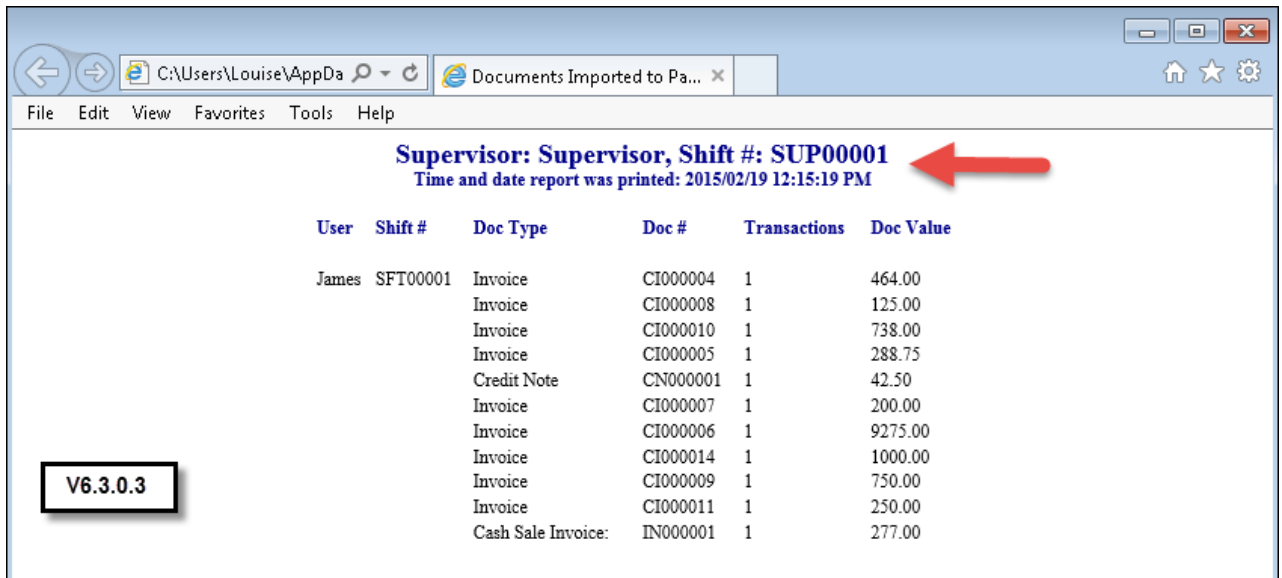
? Continue Cashup?

Yes No

- The system will inform you whether the "**Cash-Up**" has been successful, or if it had failed. If the "**Cash-Up**" failed, it will be due to one of the 2 reasons mentioned at the beginning of Step 13
- In the case of a successful "**Cash-Up**", all data will automatically be send to Pastel
- Click on "**Documents**" in order to see the documents connected to this shift

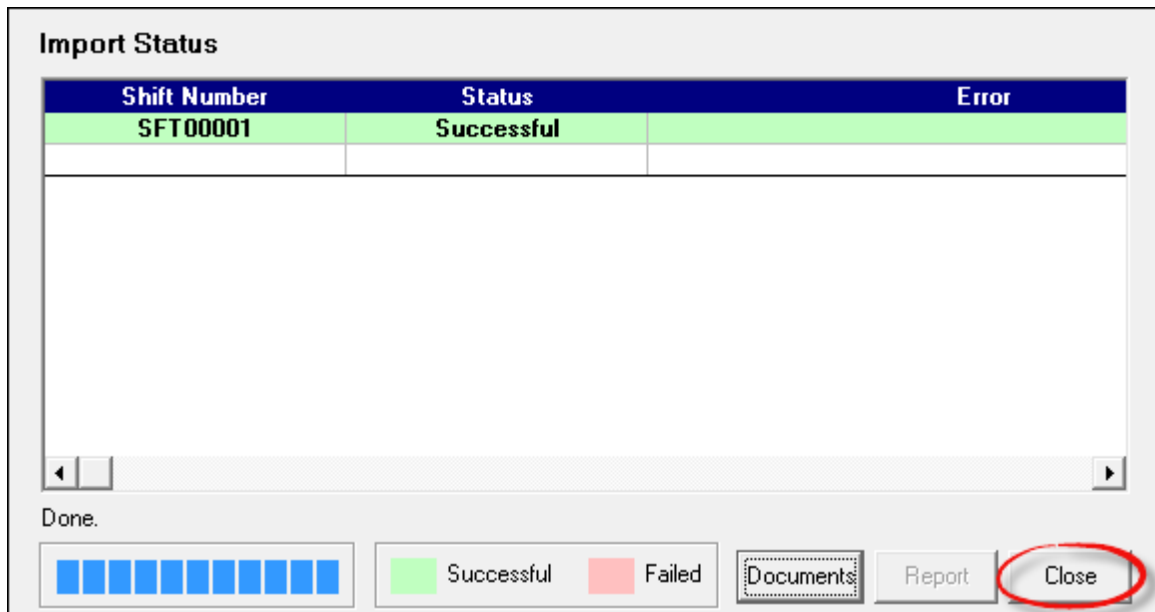


- The "**Documents**" report displayed

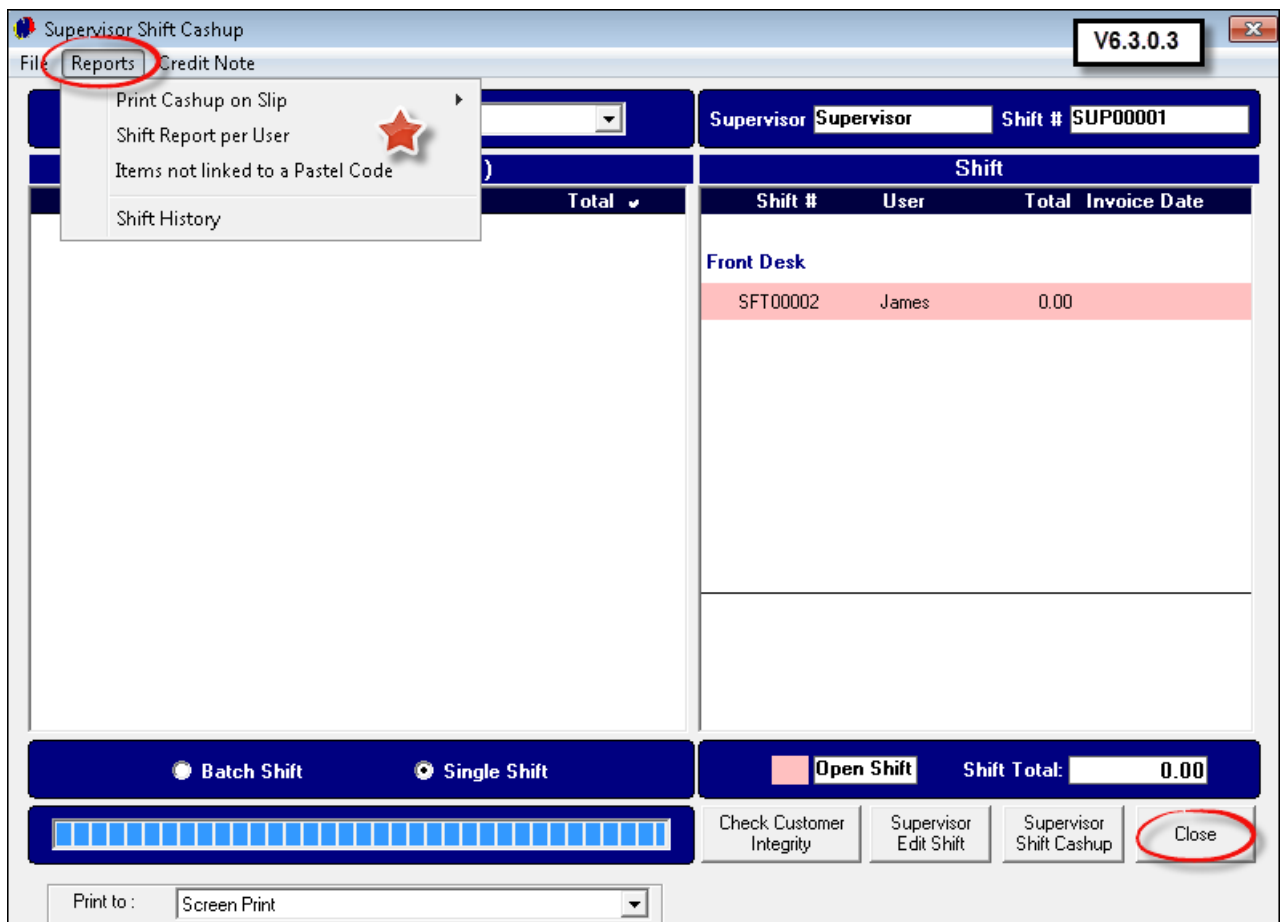


- Close the report

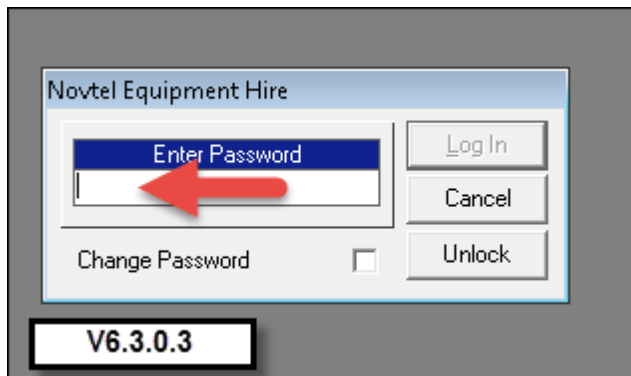
- Click on "Close" to exit the "Import Status" window



- In the "Supervisor Shift Cash-Up" window, various reports can be viewed and printed by clicking on "Reports", and selecting the applicable option
- Click "Close" to exit the "Supervisor Shift Cash-Up" window



- The "**Supervisor**" will be logged out, and the next "**User**" can log in for his or her Shift
- Remember that a Shift must be opened by the "**Supervisor**" if the "**User**" will be raising deposits and receiving payments



This concludes the basic "**Container Hire**" Tutorial. Please register on Novtel's Forum for more information, at <http://www.novtel.com/forum/index.php>



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