

Novtel[®] Equipment Hire

The Basics of Novtel Ablution Hire

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Introduction

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TEI Restrooms

www.freepik.com/photos/excavator'>Excavator photo created by onlyyouqj



The Novtel Equipment Hire Software package can be used to manage the following:

- ✓ Tool Hire
- ✓ Heavy Machinery Hire
- ✓ Container Hire
- ✓ Suit Hire
- ✓ Photography or Video Equipment Hire
- ✓ Lighting and Sound Equipment Hire
- ✓ And much more

In this document, we will focus only on the basics of Ablution Hire services.

- ✓ Hire Items are to be created and linked to specific Categories and Sub-Categories
- ✓ A Contract per site is created and linked to a Customer. One contract can manage the rental of multiple hire items.
- ✓ Deposits can be raised and paid on a contract.
- ✓ Hygiene Schedules are set and managed.
- ✓ Specific areas or sites are allocated to a Service Agent responsible for the servicing of the Items.
- ✓ Hygiene Service Instruction documents are produced; a site sequence set, and the Service Agent will capture the service details as they proceed from one site and item to another.
- When the Service Agent returns after a service run and hands in their 'Service Instruction' documents, the hygiene consumables used can be added per item, and it will accumulate on the Contract until the items are returned.
- ✓ When an Item is returned later than agreed upon the contract end date, a 'Late Return Fee' can be charged automatically - if activated.
- ✓ If a Hire Item is damaged beyond repair, the Customer can be charged for the replacement of the Item.
- ✓ Upon returning Items the Invoicing happens automatically.
- ✓ If the Deposit paid amount exceeds the Invoice total, a deposit refund can be done from the Contract, and the affected accounts in the financial system will be listed on the contract's Deposit Tab.
- ✓ A Contract payment for an outstanding balance can be processed from the Contract itself.



Sage Evolution



A SQL W





□ INTEGRATION

Novtel seamlessly integrates with Sage Pastel Xpress, Sage Pastel Partner and Sage Evolution. GL Accounts and Entry Types are set up in the financial system and are linked to Novtel to ensure accurate financial posting.

Extensive financial reporting is then also obtained from the Financial system.

Novtel Equipment Hire also integrates with Microsoft Access; SQL; Word, Excel and Outlook, as well as other Novtel Products such as Relations Management and Access Control.

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Creating Contracts

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TEI Restrooms

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Equipment Hit

Novtel Ablution	Hire U	Jltimat	e Stan	dard 6.9	9.0.2 - [ltem G	irid]								
🥐 File Edit M	lodify	Setup	p Pro	cess	Report	ts He	lp								
1 i i	TOD		<u>- </u>	+	-		23	C	X	7	Ĩ	Q		3	
01001001 🔐	21 Sep 2022 Wed	22 Sep 2022 Thu	23 Sep 2022 Fri	24 Sep 2022 Sat	25 Sep 2022 Sun	26 Sep 2022 Mon	27 Sep 2022 Tue	28 Sep 2022 Wed	20 5 Cor 2022 Thu	an tract / 2022 Fri	01 Accoun 2022 Sat	02 t - Nev 2022 Sun	v / Edit 2022 Mon	04 Oct 2022 Tue	05 Oct 2022 2 Wed
01001001															
01001002															
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01003001															
01003002															

Customers Number ID Number Telephone Mobile Phone External Ref Physical Address Postal Addess Email Description Refresh <F5> 044 693 12345 082 1234567 eterson Constructio Add New <F6> Edit Search Select <F7> Description C ID Number C Telephone # C Mobile Phone # C Number Close C External Ref C Physical Address C Postal Address C Email Address

Contracts are linked to Customers, and the Customer will receive an Invoice for all rented items, services, hygiene consumables used, etc.

Either a Cash or Account Contract can be created, and if a Customer is classified as a 'Corporate Customer', the 'Contract Account' icon is selected.

Immediately, the 'Customers' window is displayed. If the Customer does not have an existing Customer Master File yet, click 'Add New', create, and save the account before selecting it.

However: An existing Customer Master File can be searched for and selected by clicking on any of the 'Search' options in the bottom part of the window.

Clicking on the required Customer, the 'Select' button is clicked to link this Customer to the new Contract.





ACCOUNTCUST	O M E R								
Account Code	PE0002			🔽 Corporate Cu	istomer	Billing Interval	On Month End		- 0
External Account Ref			Add Delive	ery Address			×		_ ,
Description * Customer Category	Peterson Construction 5 - Construction Industry		Site Code:	2 e: (3) PE0002	Service S Peterson	equence Construction			
General ID Site	Ĭ	Site Details Cor	Area Code:		Í		- 1	Private Cu:	stomer
			GPS (N/S) : GPS (E/W) :	n: -000.000000 -000.000000		at As: -031.123564 at As: -031.123564			
			Contact Person Telephone:						
			Mobile Phone: Fax Number:						
Add 🚹	Edit Delete	1	Email Address: Delivery Add						
						fir f	Ξ		
Account Balance 0r	Rent Total	Due Available Cre			Accept	Cancel			1
0.00	0.00			Provisional Customer St	atement	Pastel Customer S	Statement	Accept	Cancel

Add Delivery Add	ress	1	🥬 Available area	S		×
Site Code:		Servic	Search			
Customer Code:	PE0002	Peters	Search By	Code 🗸]	
Area Code:	4 🔍		Search For		-	
Site Number/ Code:						
Site Description:			Code	Description		
GPS (N/S) :	-000.000000	F	DZBH HERD	Diaz Beach Heiderand		
GPS (E/W) :	-000.000000	- F.	HNBS	Hartenbos Mossel Bay Golf Estate		
Contact Person:			MCBD	Mossel Bay Business District		
Telephone:			MECO VRBY	Monte Cristo Voorbaai		
			Add N	ew Area	Accept	Cancel

Proceeding to the 'Site Details' tab, the specific site to which a rented item is to be linked, must be created.

- 1. By clicking 'Add', the 'Add Delivery Address' screen is opened.
- 2. The 'Site Code' cannot be created manually, but Novtel will allocate this code when the site is saved.
- 3. The Customer Code and Description is automatically entered according to the Customer selected.

4. Area Code

Clicking on the search option in the 'Area' field, the list of all pre-created 'Areas' is opened, and the applicable option is to be selected. In this case, Mossel Bay Golf Estate'.



Adding a Site

5. Site Number / Code

This field cannot be populated manually, and Novtel will allocate a unique code here upon saving the site.

6. Site Description

Enter a description for this site which will easily be recognizable by the service agent when performing their duties.

7. GPS Coordinates

Capture the specific GPS Coordinates for this site in the format indicated.

8. Contact Details

Specify the contact person for this site, as well as their contact details.

9. Delivery Address

Enter the physical address for this site and click 'Accept' to save it.

🌘 Add Delivery Ad	ldress		×
Site Code:		Service Sequence	0
Customer Code:	PE0002	Peterson Construction	
Area Code:	MCBD 🔍	Mossel Bay Business District	
Site Number/ Code:	6		
Site Description:	6 Apartment Cor	nstruction	
GPS (N/S) :	-000.000000	Format As: -031.123564	
GPS (E/W):	-000.000000	Format As: -031.123564	
Contact Person:	8 Grant		
Telephone:			
Mobile Phone:	082 123654		
Fax Number:			
Email Address:	grant@pconst	truct.com	
Delivery Address	9 West Street Mossel Bay G Mossel Bay 6500	olf Estate	
		Accept Cancel	



100

Adding a Site

ACCOUNT CUST	T O M E R										-
Account Code	PE0002			F	 Corporate Cus 	tomer	Billing Inter	val On Moni	th End	• 0	2
External Account Ref]						-			
Description *	Peterson Construction			r	Order Number	🧌 Edit Deli	very Addre	55			×
Customer Category	5 - Construction Industry			.	🖌 Use Itera Tasif	Site Code:		PE0002/001	Service S	Sequence	0
Genera	al	Site Details		Contract	t Details	Customer Co	ode:	PE0002	Petersor	n Construction	
ID Si			Contact	Mobile	Site #	Area Code:		MCBD 😡	Mossel E	Bay Business District	
PE0002/001 A	Apartment Construction		Grant	082 123654	001	Site Number	r/ Code:	001			
						Site Descript	tion:	Apartment Con	struction		
						GPS (N/S):		-000.000000	For	mat As: -031.123564	
						GPS (E/W) :		-000.000000	For	mat As: -031.123564	
	1					Contact Per	son:	Grant			
	1					Telephone:					
	1					Mobile Phor	ne:	082 123654			
						Fax Number	:				
						Email Addre:	\$\$:	grant@pconstr	uct.com		
								,			
		1				Deliveru á	ddress	West Street			_
Add	Edit Delete				New Contract	Delivery A	Address	West Street Mossel Bay Go	lf Estate		
Add	Edit Delete				New Contract	Delivery A	Address		lf Estate		
			R		New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay	lf Estate		
]	STOME	R		New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay	lf Estate		
A]				New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay		✓ Corporate C	ustomer
Account Balance	A C C O U N T C U Account Co	de PEOC			New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay		Corporate C	ustomer
Account Balance	A C C O U N T C U Account Co External Account R	de PEOC	02		New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay		Corporate C	ustomer
Account Balance	A C C O U N T C U Account Co	de PEOC		ction	New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay		 Corporate C Order Numb 	
Account Balance	A C C O U N T C U Account Co External Account R	ide PE00 ief	02		New Contract	Delivery A	Address	Mossel Bay Go Mossel Bay	R T	·	er Require
Account Balance	A C C O U N T C U Account Co External Account R Descriptior Customer Catego	ide PE00 ief	02 son Construc	ndustry			Address	Mossel Bay Go Mossel Bay conn	Г Г	Order Numb	er Require
Account Balance	A C C O U N T C U Account Co External Account R Description Customer Categ	de PEOC lef Peter ory 5-Co neral	02 son Construc	ndustry	New Contract	ils		Mossel Bay Go Mossel Bay 6500	F F Contract	☐ Order Numb ✔ Use Item Ta Details	er Require
Account Balance	A C C O U N T C U Account Co External Account R Description Customer Catego Gen	ide PEOC ief Peter ory 5-Co neral Site	02 son Construction In	ndustry		ils Conl	tact	Mossel Bay Go Mossel Bay conn conn conn conn conn conn conn con	F F Contract	Order Numb Use Item Ta Details Site #	er Require
Account Balance	A C C O U N T C U Account Co External Account R Description Customer Categ	ide PEOC ief Peter ory 5-Co neral Site	02 son Construc	ndustry		ils	tact	Mossel Bay Go Mossel Bay conn conn conn conn conn conn conn con	F F Contract	☐ Order Numb ✔ Use Item Ta Details	er Require
Account Balance	A C C O U N T C U Account Co External Account R Description Customer Catego Gen	de PEOC lef Peter ory 5-Co neral Site Apartment	02 son Construction In	ndustry		ils Conl	tact nt	Mossel Bay Go Mossel Bay 6500 C Mobile 082 1	F F Contract	Order Numb Use Item Ta Details Site #	er Require
Account Balance	A C C O U N T C U Account Co External Account R Description Customer Catego Gen ID PE0002/001	de PEOC lef Peter ory 5-Cr neral Site Apartment	02 son Construction In Construction	ndustry n		ils Coni	tact ht	Mossel Bay Go Mossel Bay connormal c	F Contract 23654	Order Numb Use Item Ta Details Site # 001	er Require
Account Balance	A C C O U N T C U Account Co External Account R Description Customer Catego Gen ID PE0002/001 PE0002/002	de PEOC ef Peter ory 5-Co neral Site Apartment Waterfron Waterpark	02 son Construction In Construction	ndustry n n n		ils Conl Grar Heir	tact ht	Mossel Bay Go Mossel Bay GSOO V Mossel Bay C Mossel Bay C	Contract 23654 63258	Order Numb Use Item Ta Details Site # 001 002	er Require

The site has now been created successfully.

Clicking on the Site and clicking 'Edit', the 'Site Code' and 'Site Number/Code' fields have been populated by Novtel, and the Customer's Site is now identifiable by this code.

Please note that multiple sites can be added per Customer, and a contract per site is to be created.

In this case, we have created 5 different Sites for 'Peterson Construction' and will therefore also create 5 Contracts for the items to be rented by this Company.



Equipment Hire

Creating a Contract per Site

Account Co				~	Corporate Custor	ier	Billing Interval On	Month End	•	• 0
xternal Account R	ef									
Description	* Peterson Construction				Order Number Re	quired				
Customer Catego	ry 5 - Construction Industry			▼	Use Item Tariff Pr	ices				
Ger	ieral	Site Details		Contract D) etails		User Defined Fields		Private Cus	stomer
ID	Site		Contact	Mobile	Site #					
PE0002/001	Apartment Construction		Grant	082 123654	001					
PE0002/002	Waterfront Construction		Hein	083 963258	002					
PE0002/003	Waterpark Construction		Paul	081 784512	003					
PE0002/004	Residential Building Site		Tiaan	084 456213	004					
PE0002/005	Industrial Park Construction		- · · ·							
			Duinton	083 214587	005					
Add	Edit Delete]	unton		005 New Contract					

A contract can now be created for a specific Site by clicking on it, and then clicking on the 'New Contract' button.

- 1. The selected Customer's Code and Description is linked to this contract, and the 'Customer Category' the Customer is linked to, is displayed in a green background colour.
- 2. The 'Site Number' and Description is displayed here
- 3. The 'Branch' for which the contract is created, is indicated here.

🌔 Contract Details				×
Contract Volume #	New Volume	20221011	Contract Number:	
Customer Code :	PE0002	Peterson Construction 🚺 🗕	Construction Industry	
Site Number :	PE0002/001 🔍	Apartment Construction (2)	Last Increment Date :	2022/10/11
Branch	Mossel Bay, Main Bra	anch 📃 ③		fonthly Recovery Contract 🦵



	Contract Volume #	New Volume	20221011			act Numbe	r:
	Customer Code :	PE0002	Peterson Construction		Constructio		
	Site Number :	PE0002/001 🔍	- Parallerik Generalderer		Last Incre	ement Date :	
ne General Tab	Branch	Mossel Bay, Main Br	anch 🔽	~			Moi Moi
	General Hire Ite	m Non-Ser	rial Non-Rentals	Deposits	Payment	Detail View	_
this tab the following details are found:							
_	Invoice N	umber:		ACCOU	NTCU	STOM	IEF
		te Number : 📉					
	Deliver/C (Default)	ollect 2 Deliver	r 🗨				
	Start Date	e: <u>3</u> 2022/ ⁻	10/11 👻 End Date :	2022/10/11 💌	Fixed Date Cor	_	

1. Invoice and Credit Note Number

At this stage of the contract, these 2 fields are blank, and no information can be entered here manually. Once Items are returned, Novtel will automatically create and insert an official Invoice Number.

2. Deliver / Collect

If the Hire Items are to be delivered to the site, the 'Deliver' option is selected. If the Customer is collecting the Hire Items themselves, the 'Collect' option is selected.

3. Start and End Dates

Some contracts are fixed contracts with a definite start and end date, and in such a case, the 'Fixed Date Contract' option is selected when setting the dates.

If the dates are flexible, the 'Fixed Date Contract' option is not selected.

In this case, we will create the contract for 1 day only since we will use the daily increment billing option to add days to the contract until the items are no longer needed and are returned.



Creating a Contract per Site

4. Order Number

If an order number is supplied by the Customer, it is to be entered in this field. Or, if the option is selected on the Customer Master File that an order number is *required*, the User MUST enter the order number before the contract can be saved.

5. Contract Status

The status of a new contract will by default be displayed as 'Provisional' since no deposit payment has been received yet.

6. Agent Code and Description

Agent Codes are set up in the Financial System and updated to Novtel. Contracts can then be linked to a specific person for a purely statistical value to determine how many contracts are linked to a specific sales-person over a set period of time, or to set up commission structures based on the level of performance.

Order Number :	4	
Contract Status :	5 Provisional 🗨	
Container Number :	0	
Discount % :	0	Fixed [
Agent Code Description	6	



Creating a Contract per Site

The Hire Item Tab

In this tab, the 'Deposit container' is displayed as 'Hire Number 2', and the Contract and Volume numbers have been allocated.

To add actual Items to be rented, click 'Add New'.

🏓 Contra	ect Details																	×
	Contract Volume Customer Codo:	PE0002	20221011 Peterson Cor					Co	onstructio	n Indu	istry	mbe	r:			2		
	Site Mamber : dranch	PE0002/001 Q		nstruction				La	ist Incre	emenl	Dat	te :	L.		022/10/		Contract	
Gen		e Item Non-S		on-Rentals	D	eposit	\$	Paymer	nt	[)etail	View	Υ	Fina	-		it Group/Q	
Hire Nu			Tariff Code		Total Incl.		Status	Deliver	Issue	Bal	IP		s				Rate PH	
2	ZGR00	Deposit - 0.00		0.00	0.00	Ν	Provisio	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	0.
	Display <f1></f1>	Add New <f3></f3>	Remove <f4></f4>	Hire Ib	em		-	Sele	et AllkF5	>	Sel	ect None	<f6></f6>	Mo	ve Conti	ract <f7:< td=""><td></td><td></td></f7:<>		
	On Rent <f8></f8>	Deliver/Collect <f9></f9>	Return <f10></f10>		Apply Selec	stion <	F2>	Rain [) ay/Off H <f11></f11>	lire	An	nend Cor	tract	t	Cancel	Item	- <h0< td=""><td>></td></h0<>	>
								<u> </u>		_								
			Reports to	: Screen	Print	_		•	PC)S Prir	nt to :	Screer	n Print	_	_			-
Save	Cancel		Refund Cl	narge		Cont	ract S	ummary	D	elivery	Note	1	um Nol	te			Clo	

The 'Available Items' window is opened, listing all Items which are available for the selected contract period.

This Customer requested one VIP Toilet Trailer and 2 Single Toilet Units.

Therefore, we will first click on a 'VIP Toilet Trailer' and click 'Accept'.

Search	By Code	•		
Search	For			
Code	Plant No	Serial No	Description	Maintenance Due
01001001	101	ABC123	VIP Toilet Trailer, Blue Loo, 101	No
01001002	102	ABC456	VIP Toilet Trailer, Blue Loo, 102	No
01001003	103	ABC789	VIP Toilet Trailer, Blue Loo, 103	No
01001004	104	ABC147	VIP Toilet Trailer, Blue Loo, 104	No
01002001	121		Paraplegic Toilet Trailer, Blue Loo, 121	No
01002002	122		Paraplegic Toilet Trailer, Blue Loo, 122	No
01003001	111		12 Toilet Trailer, Blue Loo, 111	No
01003002	112		12 Toilet Trailer, Blue Loo, 112	No
01003003	113		12 Toilet Trailer, Blue Loo, 113	No
01003004	114		12 Toilet Trailer, Blue Loo, 114	No
01004001	201	ZXC123	Single Toilet Unit, Blue Loo, 201	No
01004002	202	ZXC456	Single Toilet Unit, Blue Loo, 202	No
01004003	203	ZXC789	Single Toilet Unit, Blue Loo, 203	No
01004004	204	ZXC147	Single Toilet Unit, Blue Loo, 204	No
02001001	301		3 Shower Trailer, Sunny Showers, 301	No
02001002	302		3 Shower Trailer, Sunny Showers, 302	No
02001003	303		3 Shower Trailer, Sunny Showers, 303	No
02001004	304		3 Shower Trailer, Sunny Showers, 304	No
03001001	411		VIP Toilet/Shower Trailer, Blue Showers, 411	No
03001002	422		VIP Toilet/Shower Trailer, Blue Showers, 422	No
03001003	413		VIP Toilet/Shower Trailer, Blue Showers, 413	No
03001004	414		VIP Toilet/Shower Trailer, Blue Showers, 414	No
03002001	401		Econo Toilet/Shower Trailer, Blue Showers, 401	No
03002002	402		Econo Toilet/Shower Trailer, Blue Showers, 402	No
03002003	403		Econo Toilet/Shower Trailer, Blue Showers, 403	No
03002004	404		Econo Toilet/Shower Trailer, Blue Showers, 404	No
<	1			



Creating a Contract per Site

Contrac	t Volume #	2	20221011					C	ontra	act	Nu	mbe	r:			2	
Custom	er Code :	PE0002	Peterson Cor	nstruction				Co	nstructio	on Indu	stry						
Site Nu	mber :	PE0002/001	Apartment Co	onstruction				La	st Incre	ement	Date	•:		21	022/10/	11	
Branch		Mossel Bay, Main Bra	ınch	-									N	lonth	nly Rec	overy C	Contract
General	Hire It	em Non-Seri	al N	on-Rentals	De	eposits	:	Paymen	ŧΥ	D	etail \	/iew	Υ	Fina	ancial	Тĸ	iit Group/Qi
Hire Num II	tem Code Item	Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH
mienum [n				0.00	0.00	N	Provisio	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00
		osit - 0.00															
2 7	GB00 Der	osit - 0.00 Toilet Trailer, Blue Loo	0501001	90.00	0.00	Ν	Provisio	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00
2 7	GB00 Der		0501001			N	Provisio	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.0

The selected Hire Item is now inserted here, and 'Hire Number 3' has been allocated to it.

Con	tract Volume #	2	20221011					С	ontra	act	Nu	mbe	r:			2	
Cust	omer Code :	PE0002	Peterson Cor	nstruction				Co	nstructio	n Indu	stry						
Site	Number :	PE0002/001	Apartment Construction			La	Last Increment Date :					2022/10/11					
Branch Mossel Bay, Main Bra			anch	-									M	lonth	nly Rec	overy C	ontract
General	Hire	ltem Non-Se	ial N	Ion-Rentals	De	posits	Ì	Paymen	t Y	D	etail \	/iew	Ϋ́	Fina	ancial	К	it Group/Qu
Hire Num	Item Code It	em Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	Ρ	HDA	HD	Rate PH
2	ZGR00 D	eposit - 0.00		0.00	0.00	Ν	Provisio	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00
2	01001001 V	P Toilet Trailer, Blue Loo.	. 0501001	90.00	0.00	Ν	Provisio	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00
3	01004001 0	ngle Toilet Unit, Blue Lo	0501004	40.00	0.00	Ν	Provisio	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00
4	01004001 S				0.00	N	Provisio	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00
3 4 5		ngle Toilet Unit, Blue Lo	0501004	40.00	0.00	IN .	1 10 10 00										
1 3	01004001	nale Toilet Unit. Blue Lo	0501004						1	1	0		0	0			

Repeat the process to add the Single Toilet Units too, after which it will be displayed here too, and Hire Numbers 4 and 5 has been allocated to it, respectively.



A deposit can now be raised on the Items added to the contract. Proceeding to the 'Deposits' tab, the 'Suggested Deposit' amount will be indicated if set up.

The Suggested Deposit amount can be inserted in the 'Deposit Amount' field, or a custom amount can be entered. In this case, we have entered the amount of R500.00.

To now raise the deposit amount, click on the checkmark in front of the 'Deposit Raised' field.

Contract Details				×
Contract Volume #	2	20221011	Contract Number:	2
Customer Code :	PE0002	Peterson Construction	Construction Industry	
Site Number :	PE0002/001	Apartment Construction	Last Increment Date :	2022/10/11
Branch	Mossel Bay, Main Br	anch 📃		Monthly Recovery Contract
General Hire Iter	n Non-Sei	ial Non-Rentals Depo	sits Payment Detail View	Financial Kit Group/Quote
Š	1.) Deposit Raised		00002 User: Danny	
		Deposit Amount : 500		
	2.) Deposit Paid	1700.00	<<< Suggested Deposit	



Raising a Deposit

Contract Details						×
Contract Volume # Customer Code : Site Number : Branch		011 on Construction ent Construction		Contract Num Construction Industry Last Increment Date :	2022/10	2 /11 covery Contract 「
General Hirs Ite	1.) Deposit Raised		SFT00002 User	2022/10/11 • Pay	w Financial	Kit Group/Quote
Save Cancel		ports to : Screen Print und Charge	Contract Summa		creen Print Return Note	Close



Immediately, the 'Deposit Raised' field is displayed in the colour of the 'Provisional' status, and the date upon which the deposit was raised, is inserted within this field.

The date by which the deposit is payable, can now be set in the activated field.

Please note that the 'Pay Deposit' button must NEVER be clicked, and a deposit receipt issued if **proof of payment was not yet received from the Customer**. The reason being that a User must give account of all transactions at the end of their shift, and receipting a payment which was not yet received, will cause the Cashup amount to be short.

The changes can now be saved, and the Contract form closed.

Viewing the Grid, the 3 Items linked to Contract 2 have been booked for the selected period of 1 day, and the status colour of the contract is 'Provisional' at present since the deposit payment was not yet received or receipted.

CONCRET Ablution Hire

Accessing a Contract

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3

TEI Restrooms

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Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

There are various methods to access an existing contract, namely:

Method 1: By clicking on the 'Edit Contract' button on the Grid

There are different status options to search for the required contract: The '**All Contracts**' option displays contracts linked to all statuses.

Method 2: From the Grid

by right-clicking on any of the reservations linked to a contract, and selecting Contract – View Contract Details', the Contract is opened.

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01003004			Vol			ontract St		Is in i			[
01004001		4	2	ane		2 20	an baie)22/10/11	End Date 2022/10/11	Status Provisional	Site Description Apartment Construction	Invoice #			
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				Click on (Column Heade	to sort. C	Click on line to	select Transacti	ion.					
			Accoun	t Balance	On Rent Total	Total	Due Avai	able Credit	Provisi	onal Customer Statement	Pastel Customer	Statement	Accept	Cancel

Method 3: From the Customer Master File

From the 'Contract Details' tab on a Customer's Master File, the option is selected to view 'All Contracts'.

Either by double clicking on the contract, or by clicking on the contract and clicking 'View/Edit', the 'Contract Details' screen is opened.



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Method 4: From the Contract Icon

Clicking on the 'Account Contract' or 'Cash Contract' icon and selecting any of the search methods, a specific Customer can be searched for and selected.

The contract is also then accessed from the 'Contract Details' tab.

Method 5: From the 'Edit' Menu

Clicking on either the 'Contract Cash' or 'Contract Account' options, a specific Customer can be selected, and the Contract accessed from their Customer Master File.

CONCRET Ablution Hire

Processing a Deposit Payment

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TET Restrooms

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Г	10	Sales (POS)
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01001001 🔍	Mon	
01001001		Deposits
01001000		Payouts Supplier / Credit Notes
01001002		Account Payments
01001003		POS Credit Note from Invoice
01001004		
		Receipt Refund
01002001		Credit Note Payout/Link
01002002		
01003001		Shift Cash Up
		Shift Summary
01003002		Supplier Debit Note (Supervisor ONLY!)
01003003		Supplier Debit Note (Supervisor Orders)

Once a deposit payment has been received, the System User will issue a receipt by clicking on the dropdown menu next to the POS Icon and selecting 'Deposits'.

Clicking on the search button in the 'Contract Volume Number' field, ONLY contracts for which a deposit was raised, and with an outstanding deposit payment, will be listed.

The applicable contract can be searched for by means of either the Contract Number or Description, or the Customer Code or Description.

0	Deposits								×
	 <u>Contract Volum</u> Contract Volume 1 			Deposit History Date	:		Туре		Amount
	Q Customer Descr	Select Cor Contract #	itract Contract Desc	viction	Cust Code	Cust	Description		×
	Hire Number	2	20221011		PE0002		rson Construct	ion	Cancel
	Customer Descr								1

Processing a Deposit Payment

1

Equipment Hir

Deposits				×
	Deposit History :			
Contract Volume Number Contract Volume Number : 2	Date	Туре		Amount
Hire Number 2 Customer Description : PE0002 - Peterson Construction			Amount Raised : Amount Paid :	2 500.00
	Payment Type : Credit Card 3 • Payment Date : 2022/10/11	Pa	yment Received : Change :	0.00
User: Danny Shift #: SFT00002	Credit Card Number : 789456 Credit Card Type : VISA 🗨		PAYMENT I 500.0	
<f2> - Accept Print to :</f2>	Screen Print		_	Close

Deposits			×
	Deposit History :		
Contract Volume Number	Date	Туре	Amount
Contract Volume Number :			
2 9			
Customer Description :			
PE0002 - Peterson Construction			
Hire Number			
2	I		
Customer Description :		Amoun	t Raised : 500.00
PE0002 - Peterson Construction		Amo	unt Paid : 0.00
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	Payment Date : 2022/10/11		
		·	
	Credit Card Number : 789456	PAY	MENT DUE
User: Danny	Credit Card Type :		
Shift #: SFT00002	Vice v	ו סו	00.00
ST 100002		1	
<f2> - Accept Print to :</f2>	Screen Print		 Close

- 1. The selected contract will now be inserted here.
- The deposit amount raised on this contract will be displayed in both the 'Amount Raised' and 'Payment Due' fields.
- 3. Select the payment method as used by the Customer and enter the payment date and other payment details.

Please note that the 'Accept' button will remain disabled unless an amount is entered in the 'Payment Received' field.

Enter the exact amount as received from the Customer and click 'Accept' to print the receipt.

The deposit receipt displays the information captured by the system user, as well as the User who has processed the transaction, their shift number and the exact date and time the receipt was issued.

Zoom 100% Hygiene Experts 44 Green Earth Street Bellville Cape Town 8000 Tel : 044 123456
44 Green Earth Street Bellville Cape Town 8000
44 Green Earth Street Bellville Cape Town 8000
Bellville Cape Town 8000
Cape Town 8000
8000
Tel : 044 123456
Fax :
VAT :123456789
DEPOSIT RECEIPT
Description : 2 - 20221011
Customer PE0002 - Peterson
Construction Contract/Vol 2/2
Payment Type : Credit Card
Credit Card Number: 789456
Credit Card Type : VISA
Payment Due : 500.00 Tax/VAT Total :
Payment Received : 500.00
Change : 0.00
Discount : 0.00
Staff member : Danny
Payment Date : 2022/10/11
Print Date : 2022/10/11
Time : 12:50:50
Shift Number : SFT00002
Receipt Number : REC00003
Thank You.

Processing a Deposit Payment

1

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2022/10/10 -	2022/10/29		soneconsu	act.com	User [efined Field efined Field	1				Dep Refund ract Balance	_	0.00
										Cond	aor a aidhice		

- 1. Since a Deposit Payment was received and receipted, the status of the items linked to the contract have been changed to 'Confirmed' automatically.
- 2. The deposit paid amount is displayed below the Grid for this contract.

Accessing the contract's 'Deposits' tab, the 'Deposit Paid' field is displayed in the colour of the 'Confirmed' status, and the date and amount paid is linked to it.

Contract Details					
Contract Volume # Customer Code :	2 Q PE0002	20221011 Peterson Construction		Contract Number:	2
Site Number :	PE0002/001	Apartment Construction		Last Increment Date :	2022/10/11
Branch	Mossel Bay, Main Bra	nch 💽			Monthly Recovery Contract 📕
General Hire Ite	m Non-Seri	al Non-Rentals	Deposits Payr	nent Detail View	Financial Kit Group/Quote
	1.) Deposit Raised 2.) Deposit Paid 3.) Deposit Applied	2022/10/11 Shift #: Deposit Amount : 500 2022/10/11 1700 Paid Amount : 500	00 <<< Suggested Depo	Danny 2022/10/11 – Pay Deposit asit]
<u> </u>	3.) Dep Fully Refun Amount Forfe Amount Refunde Forfeit Percentag	iit : 0.00 d : 500.00			
		Reports to : Screen Print		POS Print to : Screen Print	nt 💌
Edit		Refund Charge	Contract Summary	Delivery Note Return 1	Note Close

Processing a Deposit Payment

100

Cu	ntract Volume # stomer Code :	2 <u>Q</u> PE0002	Pe		onstruction		Constructio	-
	e Number : Inch	PE0002/001 Mossel Bay,	Main Branch		Construction		Last Incre	ment Date : 20
General	Hire Ite	m	Non-Serial		Non-Rentals	Deposits	Payment	Detail View Finar
Code	Description		Du		Tax	Inclusive	DEPOSIT PAID	CREDIT NOTE
1001001 1004001	VIP Toilet Trailer, Single Toilet Unit,	Blue Loo, 201	0	1	0.00	0.00	500.00	0.00
1004002	Single Toilet Unit, Additional Costs	Blue Loo, 202	0	1	0.00	0.00	INVOICE TOTAL	C N REFUND
	Payments Made				0	-500.00	0.00	0.00
							RECEIPT TOTAL	
							500.00	Recalculate Totals
							DEPOSIT REFUND	
							0.00	Refund Deposit
							DEPOSIT FORFEIT	
							0.00	Refund Due
							PAYMENT DUE	
							-500.00	Contract Payment

The 'Payment' tab indicates the payment made, as well as the receipt total.

The 'Financial' tab displays the receipt number, amount, type of transaction and the date and time when the transaction was processed.

Contract Details										×
Contract Volume #	2	9	2022101	1			Contra	ct Number:		2
Customer Code :	PE0002		Peterson	Construction			Construction	Industry		
Site Number :	PE0002/0	001	Apartmer	it Construction			Last Increm	nent Date :	2022/10/11	
Branch	Mossel B	ay, Main Bra	nch	•					Monthly Reco	very Contract 📘
General Hire Ite	m	Non-Seri	e l	Non-Rentals	Deposits	Paj	ment	Detail View	Financial	Kit Group/Quote
								_ /		
		Docur REC0	nent Num	Amount Tr 500.00 De		Time Stamp 2022/10/11	12:50:49			
		11200		300.00 20	spoar	2022/10/11	12.30.45			

Cor	tract Volume #	2 🤇	2	20221011					C	ontra	act I	lumi	per:			2	
Cus	tomer Code :	PE0002		Peterson Co	nstruction				Co	nstructio	n Indus	ту					
Site	Number:	PE0002/0	101	Apartment C	onstruction				La	st Incre	ement) ate :		2	2022/10/	11	
Bra	nch	Mossel Ba	ay, Main Bra	nch	-									Mont	hly Rec	overy C	iontract
General	Hire It	tem 🗌	Non-Seri	al N	Ion-Rentals	De	posits	Ì	Payment	ŧ	D	tail Viev	Ì	Fin	ancial	Тĸ	it Group/Q
General Hire Num		n Desc	Non-Seri	al N				Status		t	D Bal	tail Viev			, , ,	_	it Group/Q Rate PH
	Item Code Iten					Total Incl.							D S		HDA	_	
Hire Num	Item Code Iten ZGR00 Dej	n Desc)	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP OF	D S	P 0	HDA 0.00	HD	Rate PH
Hire Num 2	Item Code Iten ZGR00 Dej 01001001 VIP	m Desc posit - 500.00	I r, Blue Loo	Tariff Code	Rate PD 0.00	Total Incl. 0.00 0.00	RA N N	Status Confirmed	Deliver Deliver	Issue	Bal	IP 0H 0 0.	D S 00 0 00 0	P 0 0	HDA 0.00 0.00	HD 1.00	Rate PH 0.00

The 'Hire Items' tab displays the status of all Items, as well as the Deposit Container, as 'Confirmed'.

CONOVICI[®] Ablution Hire

On Rent Items

Page 27

5

TEI Restrooms

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200	On	Rent	Items
Equipment Hire	j		

	tract Volume		20221011						ontr			mbe	r:			2		
	tomer Code :		Peterson C					_	onstructi					_				
Site	Number:	PE0002/001	Apartment I	Construction				La	ist Incr	ement	Date	e :		21	022/10/	11		
Bra	nch	Mossel Bay, Mai	n Branch	-									l.	lonti	dy Rec	overy D	iontract	Г
General	Hi	ire Item Nor	-Serial	Non-Rentals	D	eposits		Paymer	it)	D	etail \	√iew	Υ	Fina	incial	K	it Group/Q	uote
Hire Num	Item Code	Item Desc	Tariff Code	e Rate PD	Total Incl.	BA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	н
2	ZGR00	Deposit - 500.00		0.00	0.00		Confirmed	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	
3	01001001	VIP Toilet Trailer, Blue I	.oo 0501001	90.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	(
4	01004001	Single Toilet Unit, Blue	Lo 0501004	40.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	(
5	01004002	Single Toilet Unit, Blue	Lo 0501004	40.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	l
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						2.5114						1 110				Site	Number	

Whenever Hire Items are collected or delivered, the status of the items must be changed to 'On-Rent'.

To do so, click 'Edit' first to enable changes to the contract.

By changing the 'Action' to 'On-Rent', all line items are selected automatically. To change the status of all items simultaneously, none of it must be unticked.

However: Should some of the items be delivered or collected at a later stage, those items must be unticked.

		ract Volume omer Code :	#	2 PE0002		20221011 Peterson Co	Instruction					ontr instructio			mbe	r:			2		
	Site	Number :		PE0002/0	101	Apartment C	Construction				La	st Incr	ement	Dat	e:		2	022/10/	11		
	Bran	ch		Mossel Ba	ay, Main Bra	nch	-									M	ont	hly Rec	overy C	ontract	
G	eneral	Hir	e Iter	n	Non-Seri	al 👔 I	Non-Rentals	D	eposit	s	Paymen	t)	D) etail '	View	γ	Fina	ancial	ĸ	it Group/Q	.iote
Hire	Num	Item Code	Item E)esc		Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	Ρ	HDA	HD	Rate PH	Н
•	2	ZGR00	Depo	sit - 500.00	I		0.00	0.00	N	Confirmed	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	
✓	3	01001001					90.00	0.00		Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	
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	Site	Number :	İ	PE0002/00	01	Apartm	ent Cons	struction					Date Out	2 2022/10/	13:08	<u>^</u>		
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	D	isplay <f1></f1>	A	\dd New <p< td=""><td>3></td><td>Remove</td><td><f4></f4></td><td>Action</td><td>- On Rent</td><td></td><td>-</td><td></td><td></td><td>/eek</td><td></td><td></td><td></td><td></td></p<>	3>	Remove	<f4></f4>	Action	- On Rent		-			/eek				
			+		_							Н		ortnight				Þ
	Or	n Rent <f8></f8>	Deli	iver/Collect	<f9></f9>	Return <	F10>		Apply Selec	tion <	F2>			onthly		🗾 🕧 N	otes	
			_		_					_				one		-		-
														Existin	g Hygiene Servi	ce Due		
						Rep	oorts to :	Screen	Print			-			artment Construc			
	1		1					1			-			No Exist	ing Hygiene Iter	ns at Site		
Sav	e	Cancel				Ref	und Cha	rge		Conti	ract Su	Imm	Accep				Cance	

Click on the 'Apply Selection' button.

- 1. This screen is now displayed for the first hire item, namely the 'VIP Toilet Trailer'.
- 2. The date and time upon which the item was set to 'On-Rent' is displayed at the top.
- The days upon which this Item is to be charged in addition to the weekdays, are to be selected. In this case Saturday, Sunday and Public Holidays.
- 4. In the 'Hygiene Service Details' section, the User can select the option to charge the fixed monthly rental amount IF SETUP and if applicable.
- 5. The first service date can be set
- 6. The specific days upon which the Item is to be serviced must be selected, and in this case, also the 'Day' interval option printed in blue.
- Notes can be entered if required, and the 'Accept' button clicked to save the settings for this item.





As we have linked 3 items to this contract and set all of them 'On-Rent', the next item's screen is displayed automatically for which the settings are to be applied.

Here, the days upon which the item is to be charged in addition to weekdays, must be checked.

Since 3 Items are at the same site, the 'Synchronize Service Interval' option is selected by default – causing the settings entered on the previous Item to be applied to this one too, and the User can simply click 'Accept' to save the settings for both Items.



Con	tract Volume	2		20221011									mbe	r:			2		
	tomer Code :			Peterson Cor					_	onstructi		-						_	
	Number :		02/001	Apartment Co					La	ist Incr	ement	Dat	D :	_		022/10/			
Brar	nch	Mos	el Bay, Main Bra	nch	-									, P	lonti	ly Rec	overy C	ontract	Γ
General	Ні	re Item	Non-Seri	al 👔 N	Ion-Rentals) De	eposit	\$	Paymen	x]) etail '	View	Ŷ	Fina	incial	Тĸ	it Group/Q	uot
Hire Num	Item Code	Itom Dasa		Tariff Code	Data PD	Total Incl.	DA.	Status	Deliver	Locus	Bal	IP	OHD	s	P	HDA	ЧD	Rate PH	
✓ 3			railer. Blue Loo		90.00	0.00		On Rent	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	-
✓ 4			t Unit, Blue Lo	0501004	40.00	0.00		On Rent	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	
✓ 5	01004002	Single Toile	t Unit, Blue Lo	0501004	40.00	0.00	N	On Rent	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	
_	isplay <f1></f1>	-		Remove <f4></f4>	Action	- Deliver		į		ct Alk F5 Day/Off I			ect None		Мо		act <f7></f7>	<hi< td=""><td>></td></hi<>	>
0	n Rent <f8></f8>	Deliver/0	Collect <f9></f9>	Return <f10></f10>	o: Screen	Apply Selec	tion <	F2> 🖊		<f11></f11>			end Cor			Cancel	Item		•

On Rent Items

B

Equipment Hir

The status of all of these Items are now indicated as 'On-Rent'.

The 'Deliver Action' is now selected; the selection applied, and the changes saved.

Contract Custome	Volume #	2 PE0002	٩	20221 Paters	011 on Constructio	n			ontract Nun Instruction Industry	nber:		2
Site Nur		PE0002			ent Construct				t Increment Date		2022/10/1	1
Branch		Mossel	Bay, Main Br	anch	-						Monthly Reco	overy Contre
General	Hire Ite	em	Non-Sei	ial)	Non-Rer	tals	Deposits	Payment	Detail V	iew 📋	Financial	Kit Grou
				C POS	6 Purchases	0	Invoice/Credit Note	History	C Non-Serial (LCHV	 1		
				Hyg	iene Service	0	Rain Days		C Plant			
		Item Code	Descriptio			Serv 0						
		01001001 01004001			Blue Loo, 101 Blue Loo, 201	1	0.00					
		01004002	Single To	let Unit, E	Blue Loo, 202	1	0.00					
		. 1	D ()							_		
	Displ	lay	Refresh		K on Colum	1 Heade	er to sort. Double	Llick on line to	display Transacti	on.		
					ports to : Sc				POS Print to :			

Proceeding to the 'Detail View' tab and selecting the 'Hygiene Service' option, all items to be serviced for this contract, are displayed, and currently at a zero amount since the daily increment billing procedure has not yet been performed.

Returning to the Grid, the Items linked to Contract 2 is now displayed in the colour of the 'On-Rent' status.







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Customer Code Site Number :	e: PE0002 PE0002/00	Peterson Construction		Construction	Ict Number: Industry ment Date :	2022/10/11	
Site Number : Branch		, Main Branch	1	Last Incre	ment Date :	Monthly Recover	. Contract
General	Hire Item	Non-Serial Non-Renta	ls Deposits	Payment	Detail View	Financial	Kit Group/G
In	voice Number :		ACCOU	NTCU	ѕтоме	ER	
	edit Note Number :	J					
	eliver/Collect efault)	Deliver					
	art Date : der Number :	2022/10/11 End Da	te : 2022/10/11	Fixed Date Cont			
Co	ontract Status :	On Rent 💌	Hygiene Details	Recovery [) etails		
	ontainer Number :	2					
Co		,	-		T.		
	scount % :	0	Fixed Day Limit Rate :	Default 👻			
Di	scount % : gent Code		Fixed Day Limit Rate : [)efault <u> </u>			

On the contract's 'General' tab, the 'Hygiene Details' button is available to add more information such as:

- \checkmark Remarks To be displayed on the Ablution Hire Details report.
- ✓ And to allocate permanent notes to the specified Contract Items. These notes will be displayed on the Hygiene Route Sheet and will be used as instructions to the driver.

Enter the applicable remarks, and / or click the 'Allocate Permanent Instructions to Contract Items' button.

Hygiene Details	Х
Customer PE0002 Peterson Construction	
Hygiene Contract Details Expected Contract End Date: 2022/10/11 Remarks: Allocate Permanent Instructions to Contract Items	
3 Items to be serviced daily. Hygiene consumables to be charged when filled. Site Foreman's signature required after each service.]	
Cancel Accept	

On Rent Items – Hygiene Details

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 Hygiene Contract 	t Item Permanent Notes
Select Item(s):	
Item Code	Item Description
01001001	VIP Toilet Trailer, Blue Loo, 101
01004001	Single Toilet Unit, Blue Loo, 201
01004002	Single Toilet Unit, Blue Loo, 202
L	
	Select All Select None
elected Item Notes/I	nstructions :
3 Items to be serviced	daily.
	to be also and others. Client
Hygiene consumables	s to be charged when rilled.
Hygiene consumables	s to be charged when filled. ure required after each service.
Hygiene consumables	s to be charged when filled. Jre required after each service,
Hygiene consumables	s to be charged when hilled. ure required after each service.
Hygiene consumables	s to be charged when hilled. ure required after each service.
Hygiene consumables	s to be charged when hilled. ure required after each service.
Hygiene consumables	s to be charged when hilled. ure required after each service.
Hygiene consumables	to be charged when hilled. ure required after each service.
Hygiene consumables	ure required after each service.
Hygiene consumables	ure required after each service.
Hygiene consumables	ure required after each service.

The Items can now be selected to which the permanent note is to be updated; the notes entered and added to the selected items.

Clicking 'Accept', the notes have now successfully been allocated to the selected Items.

Novtel Equipment Hire 🛛 🗙	Hygiene Details	×
Notes Saved Successfully!	Customer PE0002 Peterson Construction	
ОК	Expected Contract End Date: 2022/10/11 Remarks: 3 Items to be serviced daily. Hygiene consumables to be charged when filled. Site Foreman's signature required after each service.	Allocate Permanent Instructions to Contract Items
		Cancel

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The Daily Increment Procedure

Page 3

TEI Restrooms

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At present, the 'On-Rent' contract is created for the 11th of October ONLY. To add another day to this contract, the Recurring Billing procedure must be performed. This action will also cause the billed items to be displayed in the 'Hygiene Service Management' screen for the selected date.

Click on the 'Process' menu and select 'Recurring Billing'.

Recurring Billing		0				>
Branch 📕 Mossel Bay, Main Branch	🔽 Day 🕇	11 🕂 Month	October	▼ Year 202	2 :	
2 Daily Duration Increment	Up	Updated Customer Invoices		Proc	ry Billing	
Hire # Contract		Item Code	Status	RDA	QTY	
 ✓ 2 ✓ 3 2 	PE0002 PE0002	ZGR00001 01001001	On Rent On Rent	N N	0 1	
✓ 4 2	PE0002	01004001	On Rent	N	1	
№ 5 2	PE0002	01004002	On Rent	N	1	
		Select All	Increment S	elected Items		
						Close

- At the top of the window, the Branch currently logged into is displayed. The required billing date can now be selected – in this case, the 11th of October.
- 2. In the 'Daily Increment' tab, all items linked to 'On-Rent' contracts are displayed, and all items are selected by default. In this case, these items are linked to contract 2.

To only bill selected items, the 'Select None' button can be selected, and only the required items selected to be billed.

However: To bill all items simultaneously, all options must remain selected and the 'Increment Selected Items' button is clicked.



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Equipment Hit




Recurring Billing Branch Mossel Bay, Daily Duration Hire # 2 3 4 5	Contract ID	Customer Code Item Co PE0002 ZGR00 vtel Equipment Hire	omer Invoices le Status	RDA N	122 • ocess Recovery Billing QTY 0 1 1 1 1		×	Clicking 'Yes' to continue, the update will run and the 'Daily Duration Increment' tab for the 11th of October is now cleared.
Print to : Sc	creen Print	Select All Select None	Yes No	elected Items	Suppress Continue	Branc	h 🔜 M Daily	ring Billing X Mossel Bay, Main Branch Day 11 Month October Year 2022 Image: Contract ID Customer Code Process Recovery Billing Hire # Contract ID Customer Code Item Code Status RDA QTY
						Prir	it to :	Select All Increment Selected Items Select None Close Suppress Continue Dialog

The Daily Increment Procedure

Equipment Hire

-					
Novtel Ablution	Hire Ultima	ate Standaro	1 6.9.0.2 - [lt	em Grid]	
🧭 File Edit M	odify Setu	up Proces	s Reports	Help	
<u> </u>	TODAY	<u>s</u>	⇒ - 🖉		C
	11 Oct	12 Oct	13 Oct	14 Oct	
01001001 🔍	2022 Tue	2022 Wed	2022 Thu	2022 Fri	
01001001	3 Pete	rson			
01001003					\top
01001004					\top
01002001					\top
01002002					\top
01003001					\top
01003002					\top
01003003					\top
01003004					T
01004001	4 Pete	rson			T
01004002	5 Pete	rson			T

Returning to the 'Grid, Hire Item 3, 4 and 5 have been extended with another day.

Accessing Contract 2's 'Payment' tab the 'Invoice Total' is indicated as R170.00 since the items linked to the contract have been billed for the 11th of October.

🥬 Contract D	Details							×
	ntract Volume # stomer Code :	2 <u>Q</u> PE0002	-	on Construction			act Number: on Industry	2
	e Number : anch	PE0002/001 Mossel Bay, Main B		nent Construction		Last Incr	ement Date : No	2022/10/12 nthly Recovery Contract
General	Hire Iter	m Non-S	erial	Non-Rentals	: Deposit	Payment	Detail View F	inancial Kit Group/Quote
Code 01001001	Description VIP Toilet Trailer,	Blue Loo 101		Qty Tax 1 11.74	Inclusive 90.00	DEPOSIT PAID	CREDIT NOTE	
01004001 01004002	Single Toilet Unit, Single Toilet Unit, Additional Costs	Blue Loo, 201	1	1 5.22 1 4.91 0.00	40.00 40.00 0.00			
-	Payments Made			0.00		INVOICE TOTAL	C N REFUND 0.00	
						RECEIPT TOTAL	Recalculate Total	s
						500.00 DEPOSIT REFUND		
						0.00	Refund Deposit	
						DEPOSIT FORFEIT	Refund Due	
						PAYMENT DUE		
						-330.00	Contract Paymen	
	Edit			ports to : Scree	n Print Conl		OS Print to: Screen Print	Close

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Hygiene Scheduling and Re-Scheduling

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Novtel Ablution I	Hire Ultimate S	Standard 6	5.9.0.2 - [lte	m Grid]			
🥐 File Edit Mo	odify Setup	Process	Reports	Help			
🔺 📥 🕂			urring Billi nch Transfe	-		1	i Q
l ſ	11 Oct	Hyg	giene Servi	ce Manage	ment	.6 Oct	17 Oct
01001001 🔍	2022 Tue	Hyg	giene Sche	dule)22 jun	2022 Mon
01001001	3 Peterso	lter	n Adjustm	ent			
01001002	7 Peterso	Wo	rk Order / J	Job Card			
01001003		Inp	ut Hour Re	adings (Su	pplier)	_	
01001004							
01002001							

From the 'Process' menu, the existing schedules – as selected when the contract Items were set to 'On-Rent' – can be viewed and a report can be printed.

- 1. A Specific Area can be selected, or, to list all areas, the 'XX- All Areas' option is selected.
- 2. All Items are scheduled to be serviced from Monday to Sunday, and at a day interval.

🙌 Hygiene Sc	hedule													-		×
Branch	Mossel Bay, M	ain Branch	•		Se	elect o	late		2022/1	0/12	•	Select Area	XX - All Areas		1	
Site	October 2022 Description Apartment Construction Residential Building Site Industrial Park Constru	2022/10/12	CoNo 2 4 3	2022/ Su V				2022/ Th V	2022/ Fr V	2022/ Sa V V	Interval Day Day Day Day	No 1 2 3		nbos rand e Cristo el Bay Busi el Bay Golf		t .
													Single Site 🔿			

3. All Sites are listed when the 'By Site' list option is selected.



Hygiene S	chedule													_		×
Branch	Mossel Bay, M	ain Branch	-		S	elect o	late	[2022/1	0/12	•	Select Are	a 🔀 - A	l Areas		•
	October 2022			2022/	2022/	2022/	2022/	2022/	2022/	2022/						
Item 01001001 01001002	Description VIP Toilet Trailer, Blue VIP Toilet Trailer, Blue	Next Service 2022/10/13 2022/10/12	2	Su V	Mo V	Tu V	We Ve	Th V V	Fr V	Sa V	Interval Day Day	No 1	Item Scroll	Page Scroll	Max Scroll	
 ✓ 01004001 ✓ 01004002 	Single Toilet Unit, Blu Single Toilet Unit, Blu	2022/10/13 2022/10/13	2 2	V	2	2	✓✓	V	2	✓	✔ Day ✔ Day	□ 3 □ 4	Up	Up	Up	
 ✓ 01004003 ✓ 01004004 	Single Toilet Unit, Blu Single Toilet Unit, Blu	2022/10/12 2022/10/12	3 4	2	2	2	2	>	2	2	✔ Day ✔ Day	□5 □6	Down	Down	Down	
													List Options – By Site By Item	C c		
													Single Site	0		

When the 'By Item' list option is selected, all Items are listed individually.

List Options By Site O By Item O Single Site C Site Number By selecting the 'Single Site' option, a specific Customer can be searched for and selected first.

Then, the required Site can be selected.

Description	Number I	D Number	Telephone	Mobile Phone	External Ref	Physical Address	Postal Addess	Email	111	Refresh <f5< th=""></f5<>
Customer Cash	CU0001 1	1234567891011	044 123456785	082 123456785		123 Jasper Ave	PO Box 123		F	
Maintenance Customer	MA0001 1	147258369	1145458787	898565		454545454	12121221		F	Add New <f< td=""></f<>
Peterson Construction	PE0002		044 693 12345	082 12345678		98 Construction Stree	98 Construction Stree	peterson@construct.	F	
			-							
					<u> </u>					
					_					
						_				
Search							<u> </u>			Select < F7
-Search C Number	 Descripti 	ion C ID) Number	C Telep	hone #	C Mobile Phone #				Select <f7< td=""></f7<>

ID	Site	Contact	Mobile	Site #
PE0002/001	Apartment Construction	Grant	082 123654	001
PE0002/005	Industrial Park Construction	Quinton	083 214587	005
PE0002/004	Residential Building Site	Tiaan	084 456213	004
PE0002/002	Waterfront Construction	Hein	083 963258	002
PE0002/003	Waterpark Construction	Paul	081 784512	003



Equipment H

🧌 Hygiene Sc	hedule												-	- 🗆 >
Branch	Mossel Bay, Ma	ain Branch	•		Se	elect o	late	2	2022/1	0/12	•	Select Area	XX - All Areas	•
	October 2022			2022/	2022/	2022/	2022/	2022/	2022/	2022/				
Site ♥ PE0002/001 ♥ PE0002/004 ♥ PE0002/005	Description Apartment Construction Residential Building Site Industrial Park Constru	Next Service 2022/10/13 2022/10/12 2022/10/12	2 4	Su V V		Tu Y Y Y	Ve VV	Th		Sa Y Y Y	Interval Day Day Day	No123	Item Scroll Page Scroll Up Up Down Down I ist Ontions By Site By Item Single Site C	Max Scroll Up Down
		<i>.</i>											Schedule Options Not Selected C Un-Scheduled C Re-Schedule C	Contract
Select All <f2;< td=""><td>Select None <f3></f3></td><td>Print Schedule</td><td><f4></f4></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td></td><td>Close</td></f2;<>	Select None <f3></f3>	Print Schedule	<f4></f4>											Close

For demonstration purposes, we have selected the 'By Site' option, and will now print the Hygiene Schedule for all areas by clicking on the 'Print Schedule' button at the bottom of the screen.

The schedule is now printed

	Hyg	iene Sch	edule	R	epo	ort					
	Area - XX - A	II Areas Bran	ch - Moss	el Ba	iy, Ma	in Br	anch				
	Report Date - 2022/10/	12 Schedule fror	n - 09 Oci	tober	2022	to 15	i Octo	ber 2	022		
Site	Description	Next Service	Co Vol	So	Мо	Tu	We	Th	Fr	Sa	Interval
Site PE0002/001	Description Apartment Construction	Next Service 2022/10/13	Co Vol 2	So	Mo	Tu		Th		Sa	
			Co Vol 2 4	_	_	_				_	Day



Hygiene Service Re-Scheduling

Branch	Mossel Bay, M	ain Branch	•		S	elect	date		2022/1	0/12	•	Select Area	🗙 - All Are	as	•
	October 2022			2022/	2022/	2022/	2022/	2022/	2022	2022/	í				
tem	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No			
✓ 01001001	VIP Toilet Trailer, Blue	2022/10/13	2			•	•		•		🗹 Day	1	Item Scroll F	age Scroll	Max Scroll
✓ 01001002	VIP Toilet Trailer, Blue	2022/10/12	3	•	✓	✓			✓		🗹 Day	2			
✓ 01004001	Single Toilet Unit, Blu	2022/10/13	2			\mathbf{X}	\mathbf{X}	< < < <	Y Y Y		🗹 Day	3	Up	Up	Up
✓ 01004002	Single Toilet Unit, Blu	2022/10/13	2			✓			✓		🗹 Day	4		- *	
✓ 01004003	Single Toilet Unit, Blu	2022/10/12							•		🗹 Day				
01004004	Single Toilet Unit, Blu	2022/10/12	4				•		•	•	🗹 Day	6	Down	Down	Down
1								_	_						
-									_				List Options	New	Schedule New
									_				By Site 🤇	New	
									_				Byltem 🔎		Sunday Monday
													Single Site 🛛 🤇	3	Tuesday
				-									-	 ✓ 3 ✓ 4 	Wednesday
				-										▼ 4	Thursday
				-										6	Friday
				-				-	-					7	Saturday
				-				-	-				- Schedule Options		Day
								-					Not Selected		Week
								-					Un-Scheduled C		Fortnight
								-				6	Re-Schedule (Monthly
								-					ne-schedule (•	12	None
															110110
													Next Service Date		1
								-							Contract
													2022/10/13 -		
				J	J			I	1	I	J	L			

Branch	Mossel Bay, M	ain Branch	-	S	elect	date		2022/1	0/12	-	Select Area	XX - Al	Areas		2
	October 2022		2022	/ 2022/	2022/	2022/	2022/	2022/	2022/						
Item 01001001 01001002 01004001	Description VIP Toilet Trailer, Blue VIP Toilet Trailer, Blue Single Toilet Unit, Blu	Next Service CoN 2022/10/13 2 2022/10/13 3 2022/10/13 2	Su Su	Mo V	Tu VV	We V	Th V V	Fr V	Sa V V	Interval Day Day Day Day	No	Item Scroll	-	Scroll	Max Scroll
 01004001 01004002 	Single Toilet Unit, Blu	2022/10/13 2		N N N		2		>		✓ Day		Up	L	P	Up
✓ 01004003 ✓ 01004004	Single Toilet Unit, Blu Single Toilet Unit, Blu	2022/10/13 3 2022/10/13 4		V	2	N	2	2	Y	✓ Day ✓ Day ✓ Day		Down	Do	wn	Down
												List Options By Site By Item Single Site Schedule Opti Not Selected Un-Schedule Re-Schedule		New 1 2 3 4 5 6 7 8 9 10 11 12	Schedule N Sunday Monday Tuesday Wednesday Friday Saturday Day Wook Formight Monthly None
												Next Service [Contract

To change the Hygiene schedule for all sites; per item or for a single site, the applicable option is to be selected in the 'List Options' section.

- 1. Specific Items can be selected to reschedule the services, or all items can be selected simultaneously.
- 2. By clicking on the 'Re-Schedule' button, the schedule can be changed as from a specified service date.

In this case, we wish to exclude Sundays from the service schedule, and therefore this day is de-selected.

- 3. Clicking on the 'Display New' button, the 'Sunday' tick is instantly removed from all items.
- 4. To save this new schedule, click the 'Apply New' button, and click 'Yes' to update the schedule.





Printing the Schedule again, the report displays that Sundays are not included in the Schedule.

	Hygi	ene Sch	edule	R	epo	ort					
	Area - XX - All	Areas Bran	ch - Moss	el Bay	y, Ma	in Bra	anch				
	Report Date - 2022/10/12	2 Schedule fror	n - 09 Oct	ober	2022	to 15	i Octo	ber 2	022		
Item	Description	Next Service	Co Vol	So	Мо	Ти	We	Th	Fr	Sa	Interval
01001001	VIP Toilet Trailer, Blue Loo, 101	2022/10/13	2			✓	✓	✓	✓	✓	Day
01001002	VIP Toilet Trailer, Blue Loo, 102	2022/10/13	3			✓	✓	✓	✓	✓	Day
01004001	Single Toilet Unit, Blue Loo, 201	2022/10/13	2			✓	✓	✓	✓	✓	Day
01004002	Single Toilet Unit, Blue Loo, 202	2022/10/13	2		<	✓	✓	✓	✓	✓	Day
01004003	Single Toilet Unit, Blue Loo, 203	2022/10/13	3		<	✓	✓	✓	✓	✓	Day
		2022/10/13									Day

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Hygiene Service Management

Page 4!

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The Service Due Tab

Hygiene Service Management

Novtel Ablution Hire Ultima	ate Standard 6.9.0.2 - [Item Grid]
🥐 File Edit Modify Set	up Process Reports Help
🔺 📥 🕂 🎬 e	Recurring Billing Branch Transfer
11 Oct	Hygiene Service Management
01001001 <u>Q</u> 2022 Tue	Hygiene Schedule 222
01001001 3 Pete	
01001002 7 Pete	
01001003	Input Hour Readings (Supplier)
01001004	

From the 'Hygiene Service Management' screen, definite areas can be selected, and sites allocated to a specific 'Service Agent'.

The 'Site Sequence' can also be set to pre-plan a route for the service agent to follow and save time and money by working through the sites methodically.

From the 'Process' menu, click on 'Hygiene Service Management'.

The Service Due Tab

1

By default, all Sites linked to all 'Areas' are displayed in the 'Service Due' tab.

However: A specific Area can be selected to allocate to a dedicated 'Service Agent' for the day.

1	👂 Ну	/giene Mai	ntanance					_				
5	elect	Area : M	CBD - Mossel Bay Busin	ness District 💌	Branch 📕 M	ossel Bay, Main Br	ranch	•	Servi	ce Agent :	Duncan Ross	8
1			Service Due	ľ		On Service		Í		Update Service		
		Cust Code	e Customer	Descrip	tion		Area		Serv Due	Delivery Address	Previous	Driver
		PE0002	Peterson Constructi	ion Apartm	ent Construction		Mossel Bay Bu	sin	3	West Street, Mosse	IBa	
	-											
	-											
	_											

Hygiene Service Management

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Equipment Hit

	S	ervice Due		On Service	Ť	Update Servi	ice Y	Next Service
em	Code	Description	Hire #	Area	Serv Due Date	Instructions	Customer	Delivery Address
ľ	01001001	VIP Toilet Trailer, Blue Loo, 101	3	Mossel Bay Busin	2022/10/12	moducione	PE0002 - Peterson Con	
	01004001	Single Toilet Unit, Blue Loo, 201	4	Mossel Bay Busin	2022/10/12		PE0002 - Peterson Con	
1 1	01004002	Single Toilet Unit, Blue Loo, 202	5	Mossel Bay Busin	2022/10/12		PE0002 - Peterson Con	
		\frown					Hygiene Mainta	nance
	> Add Instructi > Site Sequer		Deselect all e-Schedule Item(s	Display Option View by Site	C S	earch Filter how All (• pecific Dav (*)	Select Area : MCBD) - Mossel Bay Business Dis
			s-schedule rielii(s	View by Item Cod Reprint Transacti	• ·•	pecific Day 🔿	s	ervice Due
3. >	> Print Serv	ice Cancel Service		neprint Fransacti			Item Code	Description VIP Toilet Trailer, Blue L

• Adding Instructions per Item – If Applicable

Mossel Bay, Main Branch

01001001 - VIP Toilet Trailer, Blue Loo, 10

Hygiene Service Instructions

1 of 3

Instructions / Notes

Demonstration Note for VIP Trailer.

- 🗆

×

Cancel

Branch

Accept 4

1. >> Add Instructions

2. >> Site Sequence

3.>> Print Service

Select All

Cancel Service

B. Hygiene Instructions

By selecting the 'View By Item Code' option in the 'Display Option' section, and selecting the specific Items for which instructions are to be set, the 'Add Instruction' button is selected.

> The 'Hygiene Instructions' screen is displayed, indicating the first option of the number of Items selected. In this case, it is the 'VIP Toilet Trailer', indicated as 1 of 3.

> Enter a specific note or instruction before clicking 'Accept'.



į	ervice Due	_ □ ×
Item Code	Description	01004001 - Single Toilet Unit, Blue Loo, 201
01001001	VIP Toilet Trailer, Blue Loo, 101	1 🗶
01004001	Single Toilet Unit, Blue Loo, 201 🛹	
01004002	Single Toilet Unit, Blue Loo, 202	Hygiene Service Instructions
		2 of 3
		Instructions / Notes
		Demonstration Note for 1st Single Toilet 🔿 Unit
1. >> Add Instruc	tions Select All	

The next selected item will now be indicated as number 2 of 3, and a note can now be captured and saved for this item too.

The same applies to item 3 of 3.



The Instructions will be displayed in this column next to the individual items.

ect Ar	ea: MCBD	 Mossel Bay Business District 	Branch 📕	Mossel Bay, Main Brand	ch 🗾	Service Agent :	Duncan Ross	<u> </u>	
	Se	ervice Due		On Service	Ĭ	Update Service	, ľ	Next S	ervice
Item C	Code	Description	Hire #	Area	Serv Due Date	Instructions	Site #	Customer	Delivery Address
	01001001	VIP Toilet Trailer, Blue Loo, 101	3	Mossel Bay Busin	2022/10/12	Demonstration Note for	PE0002/001	PE0002 - Peterson Con	West Street, Mossel B
	01004001	Single Toilet Unit, Blue Loo, 201	4	Mossel Bay Busin	2022/10/12	Demonstration Note for	PE0002/001	PE0002 - Peterson Con	West Street, Mossel B
	01004002	Single Toilet Unit, Blue Loo, 202	5	Mossel Bay Busin	2022/10/12	Demonstration Note for	PE0002/001	PE0002 - Peterson Con	West Street, Mossel B



Hygiene Service Management

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Hygiene Mainta	nance 9 - Mossel Bay Business District 💌	Branch 🔳 🎽	ossel Bay, Main Bran	ch 💌	Service Agent :	Duncan Ross	٩		- 0
S	ervice Due		On Service	Ť	Update Servic	e	Y Next	Service	Service History
Item Code	Description VIP Toilet Trailer, Blue Loo, 101	Hire #	Area Mossel Bay Busin	Serv Due Date	Instructions Demonstration Note for	Site # PE0002/001	Customer PE0002 - Peterson Con	Delivery Address West Street, Mossel Ba	
01004001	Single Toilet Unit, Blue Loo, 201 Single Toilet Unit, Blue Loo, 202	4 5	Mossel Bay Busin Mossel Bay Busin	2022/10/12 2022/10/12 2022/10/12	Demonstration Note for Demonstration Note for	PE0002/001 PE0002/001 PE0002/001	PE0002 - Peterson Con PE0002 - Peterson Con PE0002 - Peterson Con	West Street, Mossel Ba	
1. >> Add Instruct 2. >> Site Seque 3. >> Print Ser	nce 2022/10/12 🗸	Deselect all Re-Schedule Item(s	Display Option View by Site View by Item Coo Reprint Transact	C de c	Search Filter Show All C Specific Day C				
Print to :	Screen Print		•						Close



Setting the Site Sequence

In the case where only 1 site is linked to the selected area, setting the site sequence will not be necessary.

However, when more than 1 site is located in the same area, the sequence can be set to plan the most effective route.

By clicking on the 'Site Sequence' button, the 'Hygiene Maintenance' window is opened. From here, the search option is selected to search for a specific 'Area'.

The area is now selected.



Cj. Hygie	ne Mainta	nance	-	_		×
Ar	ea Code :	HNBS Q	Har	tenbos	:	
Seque	ID	Site		Subu	rЬ	
0 🧷	MO00	Amphi Theatre Harter	nbos	Harte	enbos	
0	PE000	52 Seafront Street		Harte	nbos	
1						
	Aci	cept	Ca	ncel	1	

All sites linked to the selected 'Area' are displayed.

At present, the sequence number for both sites are zero. In this case, the Service Agent' must attend to 52 Seafront Street first, and therefore we will drag this site to the top and save the action.

Accessing this window again from the 'Site Sequence' button, Sequence Number 1 is allocated to 52 Seafront Drive, and sequence number 2, to the 'Amphi-Theatre'.

Ę	1. Hy	giene Maintanance		5. Hygier	ne Mainta	nance	>
Se	lect /	Area : HNBS - Hartenbos	E		ea Code :		rtenbos
Γ		Service Due	On Serv	Seque	ID PE000	Site 52 Seafront Street	Suburb Hartenbos
		Description Amphi Theatre Hartenbos 52 Seafront Street	Serv I 3 1	2	M000	Amphi Theatre Hartenbos	

Hygiene Service Management

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	3D - Mossel Bay Business District 💌	Branch 📕	Mossel Bay, Main Bran	ich 👤	Service Agent :	Duncan Ross	<u>a</u>
	Service Due		On Service	Ĭ	Update Servic	e Y	Next Service
n Code 01001001 01004001 01004002	Description VIP Toilet Trailer, Blue Loo, 101 Single Toilet Unit, Blue Loo, 201 Single Toilet Unit, Blue Loo, 202	Hire # 3 4 5	Area Mossel Bay Busin Mossel Bay Busin Mossel Bay Busin	2022/10/12	Instructions Demonstration Note for Demonstration Note for Demonstration Note for	PE0002 - Peterson Con	West Street, Mossel Ba
>> Add Instru		Deselect all	Display Option View by Site		earch Filter		
>> Print S	Cancel Service	Re-Schedule Iter	n(s) View by Item Co Reprint Transact	de 🕫 S	pecific Day		
>> Print S		Re-Schedule Iter	n(s) View by Item Co	de 🕫 S			Area -
>> Site Sequ	Cancel Service	Re-Schedule Iter	n(s) View by Item Co Reprint Transact	de 🕫 S			Area - Se
>> Print S	Cancel Service	Re-Schedule Iter	n(s) View by Item Co Reprint Transact	de 🕫 S		Item I	

• Printing the Service Report

The Service Report is now to be printed by first selecting the Items, setting the date for the service to be performed, and then clicking on the 'Print Service' button.

If the 'Print Hygiene Slips' option is unticked in the Company Setup Screen, the report is displayed as follows:

Hygiene Service Schedule

Area - MCBD - Mossel Bay Business District Mossel Bay, Main Branch

Service Date - 2022/10/12 Batch - 1 Service Agent - Duncan Ross

	Item Code	,	Item Desc	cription			Volume #	Amount		Plant #	
	1	PE0002/0	001	Apartment Construction	West Stre Estate	eet , Mossel Bay G	Peterson Co	nstruction	082 12	3654	3
L	01001001		VIP Toile	t Trailer, Blue Loo, 101		2	2		0.00	101	
L	01004001				2	2		0.00	201		
	01004002		Single To	ilet Unit, Blue Loo, 202		2	2		0.00	202	
L											

The Service Due Tab

Zoom 100%

Hygiene Experts

44 Green Earth Street

Bellville

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Hygiene Service Management

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However: If the 'Print Hygiene Slips' option is ticked in the Company Setup screen, a Hygiene Slip per site will be printed and will be displayed as follows:

- If captured, the Note or Instruction is displayed for the 1. specific Item.
- All Hygiene Consumables set up in the system will be 2. reflected here, and quantities can be entered by the Service Agent. When the slip is returned to the office, the consumables can be added per item and the Customer will be liable for the payment thereof.

Next, this report will print, listing all sites allocated to the selected Service Agent.

	Hygiene S	ervice Schedule			
	Area - XX - All Area	s Mossel Bay, Main Branch			
	Service Date - 2022/10	/13 Service Agent - Duncan Ross			
Site	Site Address	Customer Name	Site Phone No	To Service	SEC
PE0002/004	56 Yellow Road , Monte Cristo	Peterson Construction	084 456213	1	0
PE0002/005	Stevens Close , Voorbaai	Peterson Construction	083 214587	2	0
PE0002/001	West Street , Mossel Bay Golf Estate	Peterson Construction	082 123654	3	1

Service Instruction	Service Instruction
Zoom 75%	🚆 🖬 🛛 Za
Hugione Exporte	Hygi
Hygiene Experts	44 G
44 Green Earth Street Bellville	
Cape Town	
8000	
Tel : 044 123456	Te
Fax :	
VAT : 123456789	VA
Hygiene Service Instruction	Hygiene
01001001 VIP Toilet Trailer, Blue Loo, Maint 101	01004004 Single 204
AF LavenderAF OrangeAF OceanSOAPT BlockT Paper	AF Lavender Ocean SOAF
01004001 Single Toilet Unit, Blue Loo, Maint 201	Paper
AF Lavender AF Orange AF	Contract/Volume Customer :
Ocean SOAP T Block T	
Paper 01004002 Single Toilet Unit, Blue Loo, Maint	Site Address :
202	
AF LavenderAF OrangeAF OceanSOAPT BlockT Paper	
Contract/Volume 2/2	
Customer : PE0002 - Peterson Construction Site Address : West Street	Staff member : Print Date :
Massel Bay Golf Estate Massel Bay	Time :
6500	Service Agent :
	Service Instruction
Staff member : Danny	
Print Date : 2022/10/13	I I I I I I I I I I I I I I I I I I I
Time : 07:20:57	
Service Agent : Duncan Ross	
Service Instruction : \$1000002	
Thank You.	
Date	
Time	Si
Name	
Parte	
Signature	

uction			0	Service Ins	truction
Zoo	om 100% 💌	[2	i 🖬	Zoo
Hygie	ene Experts				Hygie
44 Gr	een Earth Street				44 Gre
	Bellville				
C	Cape Town				С
	8000				
Tel	: 044 123456 Fax :				Tel
VAT	: 123456789				VAT
ene S	ervice Instructio	n		Hy	giene S
Single T 204	oilet Unit, Blue Loo,	Maint		01001002	VIP Toile 102
SOAP	AF Orange AF T Block	т		AF Laveno Ocean Paper	ler/ SOAP_
ıme	4/4			01004003	Single To 203
:	PE0002 - Peterson Construction 56 Yellow Road			AF Laveno Ocean	ier/
	Monte Cristo			Paper	
	6533			Contract/V	
				Customer :	
				Site Addre	SS :
r:	Danny				
	2022/10/13				
	07:23:09				
nt :	Duncan Ross			Staff memi	
uction :	SI000003			Print Date :	
				Time :	
TI	nank You.			Service Ag	ant -
				Service Ins	
[Date			Service Ins	
	Time				Th
N	ame				0
Sig	nature				т
					N
					Sigi
					519

С	ape Town	
	8000	
Tel :	044 123456	
	Fax :	
	: 123456789	
	ervice Instructio	on
2 VIP Toile 102	t Trailer, Blue Loo,	Maint
nderA SOAP_	F Orange AF T Block	т
3 Single To 203	oilet Unit, Blue Loo,	Maint
nderA SOAP_	F Orange AF T Block	т
Volume	3/3	— I
r: ress:	PE0002 - Peterson Construction Stevens Close	
	Voorbaai	
	Mossel Bay	
	6500	
mber:	Danny	
e:	2022/10/13	
	07:24:03	
Agent :	Duncan Ross	
nstruction :	SI000004	- 1
Th	ank You.	- 1
D	ate	
т	ime	- 1
Na	ame	
Sigr	nature	
		_
		Page 5



The 'Service Due' tab is now void of any information for the selected site, and the items are displayed in the 'On 'Service' tab.

Hygiene Maint	tanance						
lect Area : MCB	3D - Mossel Bay Busines	s District 💌	Branch 📕 Mossel Bay,	Main Branch	Serv	ice Agent :	٩
	Service Due	Ĭ	On Servic	e	Ĭ	Update Service	Ĭ
Cust Code	Customer	Description	n	Area	Serv Due	Delivery Address	Previous Driver

The services for all other 'Areas' can now also be allocated to specific 'Service Agents' in the same manner.

The 'On Service' Tab

🏸 Hygiene Service Management

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Customer Delvey Address Due Date On Service Sequence Area Captu FE0002 - Peterson Con West Street, Mossel Ba 2022/10/12 3 1 Mossel Bay Busin
r-LUUU2 - Preetson Lon West Street, Mossel Ba 2022/10/12 3 1 Mossel Bay Busin
Deselect all Display Option Search Filter

		Service Due	Ĭ	On Se	ervice			Upda	ate Service	Ĭ	Next Se	rvice
	Code	Description	Doc #	Service Date	Due Date	Hire #	Area	Driver	Site	Captured	Customer	Delivery Address
	01001001 01004001 01004002	VIP Toilet Trailer, Blue Loo, 101 Single Toilet Unit, Blue Loo, 201 Single Toilet Unit, Blue Loo, 202	S1000001 S1000001 S1000001	2022/10/12 2022/10/12 2022/10/12	2022/10/12 2022/10/12 2022/10/12	4	Mossel B Mossel B Mossel B	Duncan Duncan Duncan	Apartment Const Apartment Const Apartment Const		PE0002 - Peterson Con PE0002 - Peterson Con PE0002 - Peterson Con	
202	Select All	Add Consumables	Dese	ect all	isplay Option iew by Site iew by Item Cod	C le î	Specif		C	pecific Date	Г	

By default, the 'On Service' tab will display all Areas for which the service were previously printed.

To now manage the Items for each Area and Site individually, first select the 'Area' and select the Service Agent' assigned to the Area.

All Sites linked to this Area is now displayed.

- However: To add Consumables used for each Item individually – where applicable - the 'View By Item Code' 'Display Option' must be selected to activate the 'Add Consumables' button.
- 2. The first Item is selected and the 'Add Consumables' button clicked.



1

	PE0002/001 - Apartment Construction
	VIP Toilet Trailer, Blue Loo, 101
Γ	NEXT SITE START
•	
Gervice Date : 🚺	2022/10/12 🗾 Service Charge Incl : 2 40.00
Charge Code	Qty Description
AIR002	3 AF Lavender - Air Freshener - Lavender 100ml
AIR003	0 AF Orange - Air Freshener - Orange Blossom 100ml
AIR005	0 AF Ocean - Air Freshener - Ocean Fresh 100ml
LHS001	1 SOAP - Liquid Hand Soap - 250ml
SAN001	1 T Block - Sanitizer - toilet block
TPR001	4 T Paper - Toilet Paper per Roll
ĺ	0
ĺ	0
ĺ	0
í	0

The 'Hygiene Transactions' screen displays the Item's Site Number and Description at the top, as well as the selected Item.

- 1. The specific 'Service Date' can now be selected from the calendar.
- 2. The 'Service Charge' linked to this Item is displayed here by default but can be changed manually if required.
- 3. The quantity for each item used, must be set before clicking 'Accept'.

		Service Due	ſ	On S	Service		1	Upd	ate Service	Ĭ	Next Se	rvice
em(Code 01001001 01004001 01004002	Description VIP Toilet Trailer, Blue Loo, 101 Single Toilet Unit, Blue Loo, 201 Single Toilet Unit, Blue Loo, 202	Doc # SI000001 SI000001 SI000001	Service Date 2022/10/12 2022/10/12 2022/10/12	Due Date 2022/10/12 2022/10/12 2022/10/12	4	Area Mossel B Mossel B Mossel B	Driver Duncan Duncan Duncan	Site Apartment Const Apartment Const Apartment Const	Captured Danny	PE0002 · Peterson Con	Delivery Address West Street, Mossel Ba West Street, Mossel Ba West Street, Mossel Ba
	Select All	Add Consumables	Dese	ectal	Display Option — View by Site	0	Search			pecific Date		
02:	2/10/12	Re-Schedule Item(s)	Cancel		View by Item Cod		Specif	Consumables ic Service Age Captured	0			

All other Items will also be selected individually, and the hygiene consumables captured.

OR:

By clicking the 'Select All' button and clicking on 'Add Consumables', the User will capture the settings for the first item and when saving it, the window for the next item will be opened automatically. The settings for all Items can be captured and saved in sequence individually, without selecting each line separately and each time clicking on the 'Add Consumables' button.

🏂 Hygiene Service Management

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	rea : MCBD) - Mossel Bay Business District 💌	Branch 📕 📕	4ossel Bay.			•	56	rvice Agent		Duncan Ross		
	9	Service Due		On Serv	ice				Update 9	Service	Y		
em	Code	Description	Doc #	AF La	AF Or	AF 0	SOAP	T Block	T Paper				
]	01001001	VIP Toilet Trailer, Blue Loo, 101	SI000001	2	0	0	2	2	8				
	01004001	Single Toilet Unit, Blue Loo, 201	SI000001	0	1	0	0	1	3				
	01004002	Single Toilet Unit, Blue Loo, 202	SI000001	0	0	1	0	0	2	-			
										\			
	Select All	Add Consumables	Deselect all	Displ	lay Option-			Search Filte	r				
	Select All		Deselect all	View	/bySite	0		Show Detai	ls	0	Specific Date	9	
				View	· by Item Co	ode 📀		Show Cons	umables	œ			
				*16**	by nom of			•••••••		Г			
202	2/10/12	 Re-Schedule Item(s) 	Cancel Service						rvice Agent				
								Hide Captu	red				

In the 'Search Filter' section, the option can be selected to 'Show Consumables'. This way the User can check that the quantities are correct before proceeding to update the service.

The 'Update Service' Tab

Hygiene Service Management

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		Service Due	C	n Service	ľ	Upda	e Service		ſ	Next Service	ĭ	Service History	
emC	ode	Description	Doc #	Service Date	Туре	Area	Hire #	Due Date	Driver	Captured	Customer	Delivery Address	
	01001001	VIP Toilet Trailer, Blue Loo, 101	S100000		Maint	Mossel Bay Busin		2022/10/12	Duncan Ross	Danny		West Street, Mossel Ba	
	01004001	Single Toilet Unit, Blue Loo, 201	\$100000		Maint	Mossel Bay Busin		2022/10/12	Duncan Ross	Danny		West Street, Mossel Ba	
	01004002	Single Toilet Unit, Blue Loo, 202	\$100000	1 2022/10/12	Maint	Mossel Bay Busin	5	2022/10/12	Duncan Ross	Danny	PE0002 · Peterson Con	West Street, Mossel Ba	
	Select All	Complete Service 3	Deselect all	- Display Option View by Site	с								
				View by Item Code	G 🚹								
				non by nom bodb									

To now update the service settings, proceed to the 'Update Service' tab.

First select the 'View By Item Code' option.

Select all of the Items and click 'Complete Service'.

👂 Hygiene l	Maintanance											-	
lect Area :	MCBD · Mossel Bay Business District 💌	Branch	Mosse	Bay, Main Branch	•	Servic	e Agent :	Duncan Ross	٩				
	Service Due		On	Service	Ĩ	l	Jpdate Service	<u>\</u>	ĭ	Next Service	Ĭ	Service History	
ItemCode	Description		Doc #	Service Date	Туре	Area	Hire #	Du Date	Driver	Captured	Customer	Delivery Address	
								/					
Sele	ct All	Deselect	all	Display Option View by Site View by Item Code	c ¢								
Print to :	Screen Print			•								C	llose

The 'Update Service' tab will now be void of all Items.

Hygiene Service Management

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Cust	tract Volume # omer Code : Number :	2 <u>Q</u> PE0002 PE0002/001	20221011 Peterson Co Apartment (Construction			Construction	nct Numb Industry ment Date :		2/10/12		
Bran	ich	Mossel Bay, M	1ain Branch	•					Monthly	Recovery Contract		
General	Hire Ite	em N	Ion-Serial 🛛	Non-Rentals	Deposits	F	Payment	Detail View	/ Financ	ial Kit Group/Quote		lease
	lo:	la se				- 1	- 1				1 3	ervic
Line Type Item	Charge SER001	Description	P Toilet Trailor		Qty 1	Excl 34.78	Tax 5.22	Incl 40.00				Non-F
tem	AIR002		er · Lavender 100ml		2	34.78	5.22	40.00				NOU-I
tem	LHS001		d Soap - 250ml		2	26.32	3.68	30.00				
tem	SAN001	Sanitizer - to			3	39.13	5.87	45.00				
ltem	TPR001	Toilet Pape			13	28.26	4.24	32.50				
ltem	SER005		ngle Toilet Unit		2	60.60	9.09	69.69				
ltem	AIR003		er · Orange Blossom		1	17.39	2.61 2.61	20.00				
ltem	AIR005	Air Freshen	er - Ocean Fresh 100	Jml		17.39	2.61	20.00				
						258.65	38.54	297.19				
						236.65	30.34	237.13				
		Cont	ract Volume #		2022	011				a data at Niversh an		
	Edit	Cust	ract Volume # omer Code : Number :	2 <u>Q</u> PE0002 PE0002/001	_	011 son Construction ment Construct			Con	ontract Number struction Industry t Increment Date :		2 /12
	Edit	Cust	omer Code : Number :		Peter: Aparti	son Constructio			Con		2022/10/	/12
	Edit	Cust Site	omer Code : Number :	PE0002 PE0002/001 Mossel Bay, Mair	Peter: Aparti	son Construction ment Construct	ion	Deposits	Con	struction Industry t Increment Date :	2022/10/	/12 covery Contra
	Edit	Cust Site Bran General	omer Code : Number : Ich Hire Ite	PE0002 PE0002/001 Mossel Bay, Mair	Peter: Aparte Branch Serial	son Construction ment Construct T Non-Rer	ion tals		Las Payment	struction Industry t Increment Date : Detail View	2022/10/ Monthly Rec Financial	/12 covery Contra
	Edit	Cust Site Bran General Code 01001001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer,	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101	Peter: Aparti Branch Serial Dur 1	son Construction ment Construct Non-Rer Qty T 1 11.	ion tals ax Inclusiv 74 90.01	e	Con Las	struction Industry t Increment Date : Detail View	2022/10/ Monthly Rec Financial	/12 covery Contra
	Edit	Cust Site Bran General Code 01001001 01004001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer, Single Toilet Unit,	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101 Blue Loo, 201	Peter: Apart Branch Serial Dur 1 1	eon Constructionent Construct Non-Rer Qty T 1 11. 1 5.	ion tals ax Inclusiv 74 90.0 22 40.0	e]]	Payment DEPOSIT P/	struction Industry t Increment Date : Detail View	2022/10/ Monthly Rec Financial	/12 covery Contra
	Edit	Cust Site Bran General Code 01001001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer, Single Toilet Unit, Single Toilet Unit, Addtional Costs	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101 Blue Loo, 201	Peter: Aparti Branch Serial Dur 1	eon Constructionent Construct Non-Rer Qty T 1 11. 1 5.	ion tals 74 90.01 22 40.01 91 40.01 54 297.11	e D D D D	Payment DEPOSIT P/ 50	struction Industry t Increment Date : Detail View AID CREDIT NOT 10.00	2022/10/ Nonthly Rec Financial E 0.00	/12 covery Contra
	Edk	Cust Site Bran General Code 01001001 01004001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer, Single Toilet Unit, Single Toilet Unit,	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101 Blue Loo, 201	Peter: Apart Branch Serial Dur 1 1	non Construction ment Construct Non-Rer Qty T 1 11. 1 5. 1 4.	ion tals ax Inclusiv 74 90.01 22 40.01 91 40.01	e D D D D	Payment DEPOSIT P/ 50 INVOICE TO	struction Industry t Increment Date : Detail View CREDIT NOT D0.00 CN REFUND	2022/10. Nonthly Rec Financial E 0.00	/12 covery Contra
	Edit	Cust Site Bran General Code 01001001 01004001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer, Single Toilet Unit, Single Toilet Unit, Addtional Costs	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101 Blue Loo, 201	Peter: Apart Branch Serial Dur 1 1	non Construction ment Construct Non-Rer Qty T 1 11. 1 5. 1 4.	ion tals 74 90.01 22 40.01 91 40.01 54 297.11	e D D D D	Payment DEPOSIT Py 5(INVOICE TO 4(5)	struction Industry t Increment Date : Detail View CREDIT NOT D0.00 CN REFUNE 67.19	2022/10/ Nonthly Rec Financial E 0.00	
	Edit	Cust Site Bran General Code 01001001 01004001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer, Single Toilet Unit, Single Toilet Unit, Addtional Costs	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101 Blue Loo, 201	Peter: Apart Branch Serial Dur 1 1	non Construction ment Construct Non-Rer Qty T 1 11. 1 5. 1 4.	ion tals 74 90.01 22 40.01 91 40.01 54 297.11	e D D D D	Payment DEPOSIT P/ 50 INVOICE TO	struction Industry t Increment Date : Detail View AID CREDIT NOT TAL C N REFUNE 57.19 LAL	2022/10/ Honthly Free Financial E 0.00 0 0.00	/12 covery Contra
	Edit	Cust Site Bran General Code 01001001 01004001	omer Code : Number : ch Hire Ite Description VIP Toilet Trailer, Single Toilet Unit, Single Toilet Unit, Addtional Costs	PE0002 PE0002/001 Mossel Bay, Mair m Non- Blue Loo, 101 Blue Loo, 201	Peter: Apart Branch Serial Dur 1 1	non Construction ment Construct Non-Rer Qty T 1 11. 1 5. 1 4.	ion tals 74 90.01 22 40.01 91 40.01 54 297.11	e D D D D	Payment DEPOSIT Py 50 INVOICE TO 40 HECEIPT TO	struction Industry t Increment Date : Detail View CREDIT NOT D0.00 CN REFUNE 67.19	2022/10/ Honthly Free Financial E 0.00 0 0.00	/12 covery Contra
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lease note that each time consumables are added, and the Hygiene ervice is updated, the items will be accumulated in the Contract's Non-Rentals' tab as follows:

> The contract's 'Payment' tab will reflect the total for all 'Non-Rental' items as 'Additional Costs', and the amount will keep on accumulating as Consumables are added. The Invoice Total has also increased accordingly.

CONCRET Ablution Hire

The Hygiene Route Sheet

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TEI Restrooms

www.freepik.com/photos/excavator'>Excavator photo created by onlyyouqj

The Hygiene Route Sheet

Novtel Ablution Hire	Jltimate Standard	6.9.0.2 - [lte	em Grid]
🥐 File Edit Modify	Setup Process	Reports	Hygiene Service Reports
0 0	9 a	📣	
📫 🧰 🕂 🗏	₩ <i>@</i> / ` ' =	• • 🖂	Hygiene Route Sheet
10	11	12	Hygiene Re-Schedule Audit Log
0.	t Oct	Oct	Hygiene Doc Number Reporting
01001001		2022 Wed	Ablution Hire Details
01001001	2 Dotor	oon.	

The 'Hygiene Route Sheet' can be printed using any, none, or all of the filter options:

✓ Driver

60

- ✓ Client
- ✓ Item
- ✓ Area

This report can be printed for the current date or selected date range, and when the 'Print Service' button was clicked in the 'Hygiene Service Management – Service Due' tab.

The Service Agent can manually tick of each 'serviced' Site in the 'Completed' column to keep track of completed jobs – in addition to completing the 'Hygiene slip' issued per Site.

riygiene nouce	Sheet Options
Driver:	Select Date Range 🔲
	From: 2022/10/13
Item: Clear	To: 2022/10/13 💌
Area: Clear	
	Sort By: Client
	O Detailed
Use the Above options to filter Report Results. None o	f the C Summary
fields are required and more than one filter can be used	
	Cancel Accept
	Cancel Accept
voiene Exnerts	Cancel Accept
Green Earth Street	
Sygiene Experts Green Earth Street Ilville pe Town 00	
Green Earth Street Ilville pe Town	

PLANT NO	CLIENT	AREA	SITE ADDRESS	CONTACT	PHONE	DRIVER	ORDER	NOTES	COMPLETED
202	PE0002 - Peterson Construction	Mossel Bay Business District	West Street, Mossel Bay Golf Estate, Mossel Bay, 6500,		082 123654	Duncan Ross		3 Items to be serviced daily. Hygiene consumables to be charged when filled. Site Foremans signature required after each service.	
201	PE0002 - Peterson Construction	Mossel Bay Business District	West Street, Mossel Bay Golf Estate, Mossel Bay, 6500,	Grant	082 123654	Duncan Ross		3 Items to be serviced daily. Hygiene consumables to be charged when filled. Site Foremans signature required after each service.	
101	PE0002 - Peterson Construction	Mossel Bay Business District	West Street, Mossel Bay Golf Estate, Mossel Bay, 6500,		082 123654	Duncan Ross		3 Items to be serviced daily. Hygiene consumables to be charged when filled. Site Foremans signature required after each service.	
204	PE0002 - Peterson Construction	Monte Cristo	56 Yellow Road, Monte Cristo, 6533,	Tiaan	084 456213	Duncan Ross			
203	PE0002 - Peterson Construction	Voorbaai	Stevens Close, Voorbaai, Mossel Bay, 6500,	Quinton	083 214587	Duncan Ross			
102	PE0002 - Peterson Construction	Voorbaai	Stevens Close, Voorbaai, Mossel Bay, 6500,	Quinton		Duncan Ross			



The notes displayed on this report, is derived from the 'Permanent Notes or Instructions' added to the Contract's 'Hygiene Details' screen.

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid] File Edit Modify Setup Process Reports Help Contract Details	-
Contract Volume # 2 Q 20221011 Customer Code : PE0002 Peterson Construction Site Number : PE0002/001 Apartment Construction Branch Mossel Bay, Main Branch Image: Construction General Hire Item Non-Serial Non-Rentals Deposits	Contract Number: 2 Construction Industry 2022/10/13 Last Increment Date : 2022/10/13 Monthly Brecovery Contract Image: Contract Contract
Invoice Number : Credit Note Number : Deliver/Collect (Default) Start Date : 2022/10/11 End Date : 2022/10/13 F Order Number : Contract Status : On Rent Contract Status : Discount % : Di	Hygiene Contract Details Expected Contract End Date: 2022/10/11 Remarks: Allocate Permanent Instructions to Contract Items 3 Items to be serviced daily. Hygiene consumables to be charged when filled. Site Foremans signature required after each service. Site Foremans signature required after each service.
Reports to : Screen Print 202 Edit Refund Charge Contract Sum	Cancel Accept

CONTEl[®] Ablution Hire

Manually Adding Non-Rental Charges to a Contract

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TEI Restrooms

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Manually Adding Non-Rental Charges to a Contract

-

Equipment Hir

👂 Contract De	tails						🇭 Select	Charge			×
	ract Volume # omer Code :	2 PE0002	20221011 Peterson Construction			Con	- Search- Sear	ch By Code 💌			
	Number :	PE0002/001	Apartment Construction			Last In	C.c.r	ch For	1		
Bran		Mossel Bay, Main Bra				Last In	Jean				
General	Hire Ite	em Non-Seri		Deposits		Payment	Code	Description	Excl	Tax	Incl 🔺
achelar	- Internet			Doposito		r dymont	F0R001 FPT001	Forfeiture Charge Folded Paper Towels - 250	0.00 31.30	0.00 4.70	0.00 36.00
	le:	In the					HAD001 HYG001	Hot Air Dryers Hygiene Service Charge	512.17 0.00	76.83	589.00 0.00
Line Type	Charge	Description		Qty	Excl		HYG002		0.00	0.00	0.00
Item	SER001	Service - VIP Toile	t Trailor	1	34.78		INH001	POS and Shop Transaction	0.00	0.00	0.00
Item	AIR002	Air Freshener - Lav	ender 100ml	2	34.78	5.22	INI001	POS In-House Charge	0.00	0.00	0.00
Item	LHS001	Liquid Hand Soap	· 250ml	2	26.32	3.68	LAT001	Late Return Charge	0.00	0.00	0.00
Item	SAN001	Sanitizer toilet blo	ck	3	39.13	5.87	LAT002	Late Return Charge	200.00	0.00	200.00
	TPR001	Toilet Paper per Ro		13	28.26		LHS001 PTD001	Liquid Hand Soap - 250ml Paper Towel Dispenser	13.16 313.04	1.84 46.96	15.00 360.00
Item	_						REP001	Paper Towel Dispenser Replacement Charge	0.00	46.96	0.00
Item	SER005	Service - Single To	ilet Unit	2	60.60		REP002		0.00	0.00	0.00
Item	AIR003	Air Freshener - Ora	nge Blossom 100ml	1	17.39	2.61	REP003	Replacement Charge	0.00	0.00	0.00
Item	AIR005	Air Freshener - Oce	an Fresh 100ml	1	17.39	2.61	REP004	Repair Charge	0.00	0.00	0.00
							SAN001	Sanitizer - toilet block	13.04	1.96	15.00
							SCE001	Service Charge	0.00	0.00	0.00
					258.65	i 38.54	SDR001	Soap Dispenser	217.39	32.61	250.00
							SER001	Service - VIP Toilet Trailor	43.48	6.52	50.00
			Refresh	Add Rei	mark	Add	SER002		86.96	13.04	100.00
							SER003		260.87	39.13	300.00
							SER004 SER005		43.48 34.78	6.52 5.22	40.00
							SER006		34.76	13.04	100.00
							TPR001	Toilet Paper per Roll	2.17	0.33	2.50
							TRH001		152.17	22.83	175.00
								Wheateater Gut 50m	43.86	6.14	50.00
								Waste Bin	217.39	32.61	250.00
			Benette te s. D								
Save	Cancel		Reports to : Screen Print	Contra	act Su	ummary				ccept	Cancel

Should it happen that an item was damaged or removed, the Customer can be charged for it.

To do so, access the contract and click 'Edit'.

In the 'Non-Rentals' tab, click 'Add' to open the window containing all pre-created charges in the system. In this case, a wastebin was removed and must be replaced.

Manually Adding Non-Rental Charges to a Contract

Custo Site I	ract Volume # omer Code : Number :	2 20221011 PE0002 Peterson Construction PE0002/001 Apartment Construction			Constructio	act Number on Industry ement Date :	2022/10/1	
Bran General	ch Hire Iten	Mossel Bay, Main Branch 🔹	Deposit	\$	Payment	Detail View	Monthly Reco	Kit Group
Line Type Item Item Item Item Item Item Item Remark	Charge AIR002 LH5001 SAN001 TPR001 SER005 AIR003 AIR003 AIR005 VVPB001	Description Air Freihener - Lavender 100ml Liquid Hand Soge - 250ml Sanitzer - tollet block. Tollet Paper per Rol Service - Single Tollet Unit Air Freihener - Oreang Blostom 100ml Air Freihener - Oreang Filostom 100ml Waste Bin Item was removed, and had to be replaced	Qty 2 2 3 13 2 1 1 1 1	Excl 34.78 26.32 39.13 28.26 60.60 17.39 217.39 217.39 476.05	Tax 5.22 3.68 5.87 4.24 9.09 2.61 2.61 32.61	40.00 30.00 45.00 32.50 69.63 20.00 20.00 250.00	- -	
		Refr Reports to : Screen			71.14	547.19 Delete		

-

Proforma Invo	ice		0) ate :		2022/10/13
						2022/10/11
			End)ate :		2022/10/13
		Invo	ice Num	iber:		
					Hvaie	ene Experts
					44 Green E	Earth Street Bellville
eterson Construction 8 Construction Street Ioss Induxtria	PE0002				1	Cape Town 8000
lossel Bay 500				Tel :	0	044 123456
Cellular # :	082 12345678			Fax:		
Customer Contact # :	044 693 123456		EI	mail :		
Site : VAT No :			VAT	No:		123456789
			VAT	No:		123456789
VAT No :		r: 2		No: er Number:		123456789
VAT No : <u>HIRE ITEM S:</u> Contract Number:	123456789	r: 2 QTY	Ord			123456789 Incl
VAT No : <u>HIRE ITEM S:</u> Contract Number:	123456789 2 Contract Volume Numbe		Ord	er Number :		
VAT No : <u>HIRE ITEM S:</u> Contract Number: Code Hire #	123456789 2 Contract Volume Numbe Description	QTY	Ord HD	er Number: Hour	Tax	inci
VAT No : HIRE ITEM S: Contract Number: Code Hire # 01001001 3 Serial # ABC123	2 Contract Volume Numbe Description VIP Toilet Trailer, Blue Loo, 101	<u>QТҮ</u> 1	Ord HD 2.00	er Number : Hour 0.00	Tax 23.48	incl 180.00
VAT No : HIRE ITEM S: Contract Number: Code Hire # 01001001 3	123456789 2 Contract Volume Numbe Description	<u>QТҮ</u> 1	Ord HD 2.00	er Number: Hour	Tax	inci
HIRE ITEM S: Contract Number: Code Hire # 01001001 3 Serial # ABC123 01004001 4	2 Contract Volume Numbe Description VIP Toilet Trailer, Blue Loo, 101	<u>QТҮ</u> 1	Ord HD 2.00 2.00	er Number : Hour 0.00	Tax 23.48	Incl 180.00 80.00
HIRE ITEM S: Contract Number: Code Hire # 01001001 3 Serial # ABC123 01004001 4 Serial # ZXC123	2 Contract Volume Numbe Description VIP Toilet Trailer, Blue Loo, 101 Single Toilet Unit, Blue Loo, 201	<u>QTY</u> 1 1	Ord HD 2.00 2.00	er Number : Hour 0.00 0.00	Tax 23.48 10.43	incl 180.00

A note can now also be inserted by clicking 'Add Remark'. This action activates a line below the last item and the note can be typed by clicking in the line, and in the 'Description' column.

Novtel only allows 40 characters per line.

To capture a longer note, another remark line must be added.

Clicking on the 'Summary' button at the bottom of the screen, the Pro-Forma Invoice is produced, indicating the Hire Items linked to the Contract, and the costs involved.

Next, the Non-Rental items are listed. This includes the service charges; consumables and other charges and remarks added.

All Receipts issued against this contract will also be indicated.

Code	Description	Qty		Тах	Incl Amount
SER001	Service - VIP Toilet Trailor	1.00		R5.22	R40.00
AIR002	Air Freshener - Lavender 100ml	2.00		R5.22	R40.00
LHS001	Liquid Hand Soap - 250ml	2.00		R3.68	R30.00
SAN001	Sanitizer - toilet block	3.00		R5.87	R45.00
TPR001	Toilet Paper per Roll	13.00		R4.24	R32.50
SER005	Service - Single Toilet Unit	2.00		R9.09	R69.69
AIR003	Air Freshener - Orange Blossom 100ml	1.00		R2.61	R20.00
AIR005	Air Freshener - Ocean Fresh 100ml	1.00		R2.61	R20.00
WPB001	Waste Bin Item was removed, and had to be replac	1.00 ed		R32.61	R250.00
Non Rentals	Total :			R71.14	R 547.19
ECEIPTS:					
ocument#	Description	Date	Туре	Α	mount
EC00003	Contract Deposit	2022/10/11	3		R500.00

CONTE Ablution Hire

Returning and Invoicing an Item

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TEI Restrooms

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Contract Details Contract Volume # 2 2 20221011 Customer Code : PE0002 Peterson Construction Site Number : PE0002/001 Apartment Construction Branch Mossel Bay, Main Branch ▼ General Hire Item Non-Serial Non-Rente Invoice Number : Credit Note Number : Deliver/Collect Deliver/Collect Deliver/Collect Contract Status : On Rent ▼ Contract Status : Discount % :: 0	ACCOUNT CUSTOMER	All rented items can be ret items can be returned and Clicking on the 'Hire Item the 'On-Rent' status. To make any changes, the '
Agent Code Description Edit Pepotts to : Scre Refund Charge	Contract Volume # 2 20221011 Customer Code : PE0002 Peterson Construction Site Number : PE0002/001 Apartment Construction Branch Mossel Bay, Main Branch Image: Construction General Hire Item Non-Serial Non-Rentals Deposits	Contract Number: 2 Construction Industry 2022/10/13 Last Increment Date : 2022/10/13 Monthly Recovery Contract Payment Detail View Financial
	✓ 2 ZGR00 Deposit - 500.00 0.00 0.00 N On Rent ✓ 3 01001001 VIP Toilet Trailer, Blue Loc 0501001 90.00 180.00 N On Rent ✓ 4 01004001 Single Toilet Unit, Blue Loc 0501004 40.00 80.00 N On Rent ✓ 5 01004002 Single Toilet Unit, Blue Loc 0501004 40.00 80.00 N On Rent ✓ 2 0501004 40.00 80.00 N On Rent	Deliver Issue Bal IP OHD S P HDA HD Rate PH HI Deliver 0 0 0 0.00 0 0 0.00 300 0.00 0 Deliver 1 1 0 0.00 0 0 0.00 2.00 0.00 0 Deliver 1 1 0 0.00 0 0 0.00 2.00 0.00 0 Deliver 1 1 0 0.00 0 0 0.00 2.00 0.00 0 Deliver 1 1 0 0.00 0 0 0.00 2.00 0.00 0 Deliver 1 1 0 0.00 0 0 0.00 2.00 0.00 0 Holiver 1 1 0 0.00 0 0 0.00 0 0 0 0 0 0 0 <t< th=""></t<>
	Display <f1> Add New <f< th=""> Remove <f4> Action - Return On Rent <f8> Deliver/Collect <f9> Return <f10> 3 Apply Selection <f2></f2></f10></f9></f8></f4></f<></f1>	Select AllKF5> Select None <f6> Move Contract <f7> Rain Day/Off Hire <f11> Amend Contract Cancel Item</f11></f7></f6>
	Reports to : Screen Print Save Cancel Refund Charge Contract Sur	POS Print to: Screen Print mmary Delivery Note Return Note Close

be returned simultaneously, or only selected ed and invoiced.

e Item' tab, all Items are currently linked to

es, the 'Edit' button must be clicked.

Rate PH Hou

Clicking on the 'Return' button, the checkboxes next to all items are activated. The Items to be returned can now be selected. In this case, as all items are returned simultaneously, we will select all of the checkboxes and click on the 'Apply Selection' button.



The 'Select Return Date' window is displayed for the first Item on the list.

1. Date Out

The date and time this item was placed 'On Rent', is displayed here and cannot be edited.

2. Date and Time In

By default, the current date will be inserted here, but can be changed if applicable. The exact time the item is returned can now also be selected.

3. Hire Day Total

As per our example, the total hire days are displayed as 4, and the daily rate for this Item is R95.00.

4. Hire Day Adjustment

By default, the Hire Day Adjustment total is set at zero.

However: Days can either be subtracted or added from this screen, and Novtel will adjust the value accordingly.





5. Replacement Quantity and Cost

Should it happen that the Item is damaged beyond repair, and the Customer is liable for the cost thereof, the replacement quantity is entered as 1.

Novtel will insert the Cost Price total – as inserted on the 'Item's' Master File

Select Return Date —	
101 VIP Toilet Trailer, Blue Loo, 101	
Date Out : 2022/10/11 🗾 13:08 🚊	
Date In : 2022/10/13 🔽 09:22 🚔 Time Ou	ıt - 03:46
Changeover (Swop Item)	
Saturday Total 0.00 Hire Day Adjustment	
Sunday Total 0.00 Holiday Total 0.00 Off-Hire Total 0.00	
Hire Day Total 2.00 Adjustment Quantity	0.00
Adjusted Hire Day	0.00
Daily Rate 90.00 Adjustment Value	0.00
Replacement Quantity 6 0 Replacement @ Cost 0.00 Repair Fee 6 0.00	
Late Return	
Charge Extra Fee @ 200.00 No Penalty for Late Return	C
Notes	,.
8	$\hat{}$
Accept	Cancel

6. Repair Fee

If damages occurred and it can be repaired, the fee is entered in this field according to the amount needed to repair the damage.

7. Late Return

By default, this field is deactivated, and can be left unchanged if the Item was returned on time.

However: If the Item was not returned on time, this checkbox is ticked – which will activate additional fields below it.

The default fee for a late return is R200.00 in our system, but it may be a different amount at your company – depending on how your system was set up by the system Administrator.

If this option is selected, the Customer will be charged an extra R200.00 for the late return.

But, by selecting the 'No Penalty for Late Return' option, the late return is documented, but not charged.

8. Notes

Any applicable notes pertaining to this returned item, can be entered in the 'Notes' field. To finalize the return action for this item, click 'Accept'.

-**Returning and Invoicing an Item** Equipment Hire

Site Number

Display <F1>

Cancel

Save

Branch

General

•



The settings for the 3rd and final item can now be captured and saved too.

Immediately, the 'Select Return Date' window for the second item on the list is displayed, and all of the necessary settings are to be captured and saved.

Kit Group/Quote

0.00

0.00

0.00

0.00

<HC>

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Returning and Invoicing an Item

60

Equipment Hi

C <u>on</u>	tract Volume	# 2	9	_	20221011						ontr	act	Nu	mbe	er:			2		
Cus	omer Code :		E0002	!	Peterson Cor	struction				_	onstructi							~		
	Number :		E0002/001		Apartment Co					-	ist Incr	ement	Dat	e ·		2	022/10/	13		
Brar	-		ossel Bay, Ma		· ·	•													Contract	Г
General	Hi	e Item	No	n-Serial	I Y N	on-Rentals	De	eposit	s	Paymer	it]	[Detail	View	γ^{-}	Fina	ancial	۲.	iit Group/Q	uote
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<mark>a</mark> 2	ZGR00		- 500.00			0.00	0.00		Returned	Deliver	0	0	0	0.00	0	0	0.00	3.00	0.00	
3			et Trailer, Blue		0501001	90.00	180.00		Returned	Deliver	1	0	0	0.00	0	0	0.00	2.00	0.00	
■ 4 ■ 5	01004001	~	oilet Unit, Blue oilet Unit, Blue		0501004 0501004	40.00	80.00		Returned Returned	Deliver Deliver	1	0	0	0.00	0	0	0.00	2.00	0.00	
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0	n Rent <f8></f8>	Delive	er/Collect <f9></f9>	F	Return <f10></f10>		Apply Selec	tion <	F2>) ay/Off I (F11>	Hire	An	nend Co	ntract		Cancel	ltem		
					Reports to	: Screen	Print			•	P	DS Prir	nt to :	Scree	n Print					•
	Edit	Credit	Note		Refund Cl	narge li	nvoice	Cont	ract Su	ummary	C	elivery	Note	Re	turn No	te			Clo	se

The Contract can now no longer be edited since all items have been returned and an official Invoice has been issued.

Clicking on the 'Invoice' button, the Tax Invoice will be displayed, and the official Invoice Number allocated to it.

ΤΑ Χ ΙΝ VO	ICE								Date :		13 October 20
	ICE								tart Date : Number :		11 October 20 G10000
									ind Date :		Gluuuu
											Hvaiene Expe
											44 Green Earth Stre Bellvi
											Cape Tov 80
									Tel : Fax :		044 1234
Peterson Cons					PEO	002			Email :		
98 Construction Moss Induxtria	Street								VAT No :		1234567
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Hire Ite		re #	Description				QTY	HD	Hour	Rate	Incl
01001001	3		VIP Toilet Tr				1	2.00	0.00	90.00	180.00
	Dut	11 Octo	ber 2022 -	13:08:10	In	13 Oct	ober 2022			-	
01004001	4 Dut		Single Toilet ber 2022 -		Loo, 201	13 Oct	1 ober 2022	2.00	0.00 3:18	40.00	80.00
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01004002	e Dut	11 Octo	Single Toilet ber 2022 -			13 Oct	1 ober 2022			-	
Non Re _{Code}	e Dut	11 Octo Descripti	ber 2022 -	13:15:21		13 Oct		- 09:34		Tax	Incl
Non Re Code SER001 AIR002	e Dut	11 Octo Descripti Service - Air Fresh	on VIP Toilet Tra ener - Lavend	13:15:21 illor er 100ml		13 Oct	ober 2022	- 09:34		R10.43 R5.22	R80.00 R40.00
Non Re Code SER001 AIR002 LHS001	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha	on VIP Toilet Tra ener - Lavend nd Soap - 250	13:15:21 illor er 100ml		13 Oct	ober 2022	- 09:34		R10.43 R5.22 R5.53	R80.00 R40.00 R45.00
Non Re Code SER001 AIR002 LHS001 SAN001	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer	on VIP Toilet Tra ener - Lavend nd Soap - 250 - toilet block	13:15:21 illor er 100ml		13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00		R10.43 R5.22 R5.53 R5.87	R80.00 R40.00 R45.00 R45.00
Non Re Code SER001 AIR002 LHS001	e Dut	11 Octo Descript Service - Air Fresh Liquid Ha Sanitizer Toilet Pap	on VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll	13:15:21 illor er 100ml 0ml		13 Oct	ober 2022	- 09:34		R10.43 R5.22 R5.53	R80.00 R40.00 R45.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh	viP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet I mer - Orange	13:15:21 iilor er 100ml Dml Unit Blossom 10	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22	R80.00 R40.00 R45.00 R45.00 R55.00 R139.38 R40.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh	vIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet I mer - Orange aner - Ocean	13:15:21 iilor er 100ml Dml Unit Blossom 10	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml 9 Blossom 14 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22	R80.00 R40.00 R45.00 R45.00 R55.00 R139.38 R40.00
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Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
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Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:34 ty 2.00 2.00 3.00 3.00 22.00 4.00 2.00 1.00		R10.43 R5.22 R5.53 R5.87 R7.17 R18.18 R5.22 R2.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	• 09:3* ty 2.00 3.00 22.00 2.00 1.00 1.00		R16.43 R6.22 R6.56 R5.67 R7.17 R7.17 R16.16 R5.26 R2.26 R32.61	R80.00 R40.00 R45.00 R55.00 R139.38 R40.00 R20.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1	13 Oct	ober 2022	- 09:3* ty 2.00 3.00 3.00 2.00 1.00		R10.43 R6.43 R6.63 R6.67 R7.17 R7.17 R16.16 R5.22 R2.61 R5.261	880.00 846.00 846.00 846.00 846.00 8130.38 8130.38 8130.38 8130.38 8130.00 820.00 820.00
Non Re Code SER001 AIR002 LHS001 SAN001 TP R001 SER005 AIR003 AIR005	e Dut	11 Octo Descripti Service - Air Fresh Liquid Ha Sanitizer Toilet Pap Service - Air Fresh Air Fresh Air Fresh Waste Bii	VIP Toilet Tra mer - Lavend nd Soap - 25i toilet block er per Roll Single Toilet l aner - Orange erner - Ocean	13:15:21 illor er 100ml Dml Unit Blossom 10 Fresh 100m	00m1		ober 2022	- 09:34 ty 2.00 3.00 3.00 2.200 1.00 1.00		R10.43 R5.22 R5.53 R5.67 R7.17 R7.17 R7.17 R7.17 R7.17 R7.18 R5.20 R5.40	R80.00 R46.00 R46.00 R55.00 R139.38 R20.00 R250.00 R250.00

Returning and Invoicing an Item

RE

Equipment Hire



Returning to the Grid, the status of all items linked to Contract 2 has been changed to the status and colour of the 'Returned' status.

CONCRET Ablution Hire

12

Account Payments

Page 72

TET Restrooms

www.freepik.com/photos/excavator'>Excavator photo created by onlyyouqj
Account Payments

60

Con	tract Volume #	2 🔍	202	21011			Contra	ct Number:		2
Cus	tomer Code :	PE0002	Pet	erson Co	nstruction		Construction	Industry		
Site	Number:	PE0002/00	1 Apa	rtment C	onstruction		Last Increi	nent Date :	2022/10/13	
Bra	nch	Mossel Bay	, Main Branch		-				Monthly Recov	ery Contract
General	Hire Ite	m	Non-Serial	1	Non-Rentals	Deposits	Payment	Detail View	Financial	Kit Group/Q
de	Description		Dur	Qty	Tax	Inclusive	DEPOSIT PAID	CREDIT NOT		
001001	VIP Toilet Trailer, Single Toilet Unit,	Blue Loo, 201		1	23.48 10.43	180.00 80.00	500.00		0.00	
04002	Single Toilet Unit, Additional Costs Payments Made	Blue Loo, 20.	2 2	1	9.82 92.84 0	80.00 714.38 -500.00	INVOICE TOTAL	C N REFUND		
	Fayments Made				0	-300.00	1054.38		0.00	
							RECEIPT TOTAL	Recalculate	Tatala	
							500.00	Recalculate	TUIAIS	
							DEPOSIT REFUND	Refund De	nonit	
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							DEPOSIT FORFEIT	Refund D		
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							554.38	Contract Pa		

 	1	 		_	Contra	ict Payments							×
	Apply Deposit	Reports to :	Screen F	Print	Selected	· ·					History :		
Edit	Credit Note	Refund Char		oice	Code	tem(s): Description	Dur	Qty	Tax	Inclusive	🥥 On Rent 🛛 🔘 🕄	3 Month) Al
LUK	Credit Note			NICE		Deposit Applied	- D'ui	49	0.00	500.00			
						VIP Toilet Trailer, Blue	2	1	23.48	180.00	Hire Humber		
					01004	Single Toilet Unit, Blue	2	1	10.43	80.00	Contract Vol filum	ber	
						Single Toilet Unit, Blue	2	1	9.82	80.00	Contract Vol #:		
						Service · VIP Toilet Trai		2	10.43	80.00			
						Air Freshener - Lavend	0	2	5.22	40.00	2 🔣 🚺		
						Liquid Hand Soap - 250		3	5.53	45.00	Customer Description		
					SAN001	Sanitizer - toilet block	0	3	5.87	45.00	PE0002 - Peterson	Construction	2
						Toilet Paper per Roll	0	22	7.17	55.00			-
						Service Single Toilet	0	4	18.18	139.38	Payment Type :		
						Air Freshener - Orange Air Freshener - Ocean F	0	2	5.22 2.61	40.00 20.00			
						Air Freshener - Ucean F Waste Bin	0	1	32.61	20.00	Cash 💌		
					WPBU	Item was removed, and	U	-	32.6T	200.00	Payment Date :	2022/10/13	-
						Payments Made			0	500.00		,	
						r aymonio maue			0	300.00			
											Status Retu	ned:	
											Payment Recei	ived :	0.00
											Cha	nge:	0.0
											PAYME	NT DUE	
												4.38	
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					Print to :	Screen Print				-			
					User:	Danny Shi	iit #:	SE	00002				
					0301.	Danny Sh	at 11 .	51	00002				
						1							
					<f2> - Ac</f2>	cept							Close

Please note that ONLY once the actual payment is received, must this step be performed to receipt the payment amount as received by the Customer.

When Items have been returned – as in the case of Contract 2 - and there is an outstanding balance present, a contract payment can be performed from the Contract's 'Payment' tab.

The outstanding balance is displayed in red in the 'Payment Due' field. To process the receipt, click on the 'Contract Payment' button.

The 'Contract Payments' screen is opened, and the following information is automatically entered by Novtel:

- ✓ The Contract Volume Number
- ✓ The Customer
- ✓ And the 'Payment Due' amount

Account Payments

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Equipment Hire

🂔 Co	ontra	ct Payments					×
Selec	cted I	tem(s) :					History :
Coo	de	Description	Dur	Qty	Tax	Inclusive	오 On Rent 🛛 3 Month 💭 All
· ·		Deposit Applied			0.00	500.00	
010	01	VIP Toilet Trailer, Blue	2	1	23.48	180.00	Hire Humber
010	04	Single Toilet Unit, Blue	2	1	10.43	80.00	Contract Vol flumber
010	04	Single Toilet Unit, Blue	2	1	9.82	80.00	Contract Vol #:
SEF	R001	Service - VIP Toilet Trai	0	2	10.43	80.00	
AIR	002	Air Freshener - Lavend	0	2	5.22	40.00	2
LHS	5001	Liquid Hand Soap - 250	0	3	5.53	45.00	Customer Description :
	1001		0	3	5.87	45.00	PE0002 - Peterson Construction
		Toilet Paper per Roll	0	22	7.17	55.00	TE0002 Teterson construction
		Service - Single Toilet	0	4	18.18	139.38	
	003	Air Freshener - Orange	0	2	5.22	40.00	Payment Type :
	005	Air Freshener - Ocean F	0	1	2.61	20.00	Credit Card 🔻
WP	B0	Waste Bin	0	1	32.61	250.00	Payment Date : 2022/10/13 -
		Item was removed, and					Payment Date : 2022/10/13 💌
· ·		Payments Made			0	500.00	Credit Card Number :
							987456321
							Credit Card Type :
							VISA 💌
							Status Returned :
							Payment Received : 554.38
							PAYMENT DUE
							554.38
Prin	nt to :	D Dir					
	icto:	Screen Print				-	
User :	. [D anny shi	ft #:	SF	-T00002		
<f2></f2>	- Acc						Close

	Receipt : REC00004
	🚟 🖬 Zoom 100% 💌
The User will select the payment	Hygiene Experts
	44 Green Earth Street
method used by the Customer,	Bellville
select the date upon which the	Cape Town
•	8000
payment was received, and double	Tel: 044 123456 Fax:
check that the 'Payment Received'	VAT :123456789
,	RECEIPT
amount corresponds with the	
amount received from the Customer	Cust Description : Peterson Construction Cust Code : PE0002
before clicking 'Accept' to process	Contract Vol 2
before clicking Accept to process	Payment Type : Credit Card
the payment.	
The receipt is displayed as follows:	Payment Due : 554.38 Payment Received :554.38
	Change : 0.00
	Staff member :DannyPayment Date :2022/10/13Print Date :2022/10/13Time :10:07:24Shift Number :SFT00002Receipt Number :REC0004Thank You.
	Receipt Number : REC00004

Account Payments

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Equipment Hire

Contract Details						×	The	e payment is	now capture	ed, and th	e payn	nent
Contract Volum Customer Code Site Number : Branch General			ion	Construction	ement Date : 20	2 022/10/13 Ny Hecovery Contract		e amount is standing bala				the
Code Description 01001001 VIP Toilet 01004001 Single Toile	railer, Blue Loo, 101 t Unit, Blue Loo, 201 t Unit, Blue Loo, 202 osts	Dur Qty T 2 1 23. 2 1 10.	ax Inclusive 48 180.00 43 80.00 82 80.00	DEPOSIT PAID 500.00 INVOICE TOTAL 1054.38 RECEIPT TOTAL 1054.38 DEPOSIT REFUND 0.00 DEPOSIT FORFEIT	CREDIT NOTE 0.00 C N REFUND 0.00 Recalculate Totals Refund Deposit		am	e 'Financial' f nount and the ocessed.				
				0.00 PAYMENT DUE 0.00		Contract Details	2 <u>Q</u> PE0002	20221011 Peterson Construction		ntract Number: uction Industry		2
Edit	Apply Deposit Credit Note	Reports to : Sc Refund Charge	reen Print Invoice Contra		IS Print to: Screen Print elivery Note Return Note	Site Number : Branch General Hire It	i		Deposits Payment	ncrement Date :	2022/10/13 Monthly Recov	x <mark>ery Contract </mark> Kit Group/Quote
							RECOO	003 500.00 Deposit	2022/10/11 12:50:49 2022/10/13 10:07:23			
							pply Deposit	Reports to : Screen Print Refund Charge Invoice	Contract Summary	POS Print to : Screen Pr Delivery Note Return	1	Close





All Items linked to Contract 2 is now displayed in the status colour of the 'Fully Paid' status since no outstanding amount is present.



www.freepik.com/photos/excavator'>Excavator photo created by onlyyouqj

The Hygiene Service Report

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Novtel Ablution	Hire Ultimate	Standard 6	i.9.0.2 - [lte	m Grid]	
🧭 File Edit M	odify Setup	Process	Reports	Hygiene Service Reports	
📥 📥 🕂		§ - 🛏	- 🖳	Hygiene Route Sheet	
	10	11	12	Hygiene Re-Schedule Audit Log	F
	Oct 2022	Oct 2022	Oct 2022	Hygiene Doc Number Reporting	2
01001001 🔍	Mon	Tue	Wed	Ablution Hire Details	n

× Hygiene Service History Report Options ٩ Clear Select Date Range Driver: 9 Clear From: 2022/10/13 Client: -To: 2022/10/13 - -Q Clear Item: ٩, Clear Area: Sort By: Driver -Oetailed (3) C Summary Use the Above options to filter Report Results. None of the fields are required and more than one filter can be used. Cancel Accept

From the 'Reports' menu, a detailed or summary 'Hygiene Service Report' can be produced.

- All of the filter options can be used; none of it; some of it, or only one to 1. obtain the required results.
- To not only view the default current date, the 'Select Date Range' option 2. must be ticked. The User will now select the required date range to be viewed.
- Selecting the 'Detailed' option and clicking 'Accept', the report will be 3. displayed as follows:

Ну	giene Serv	ice Re	eport	-	
Tir	ne and date report was printed:	13 October 2022	10:20:00		
ITEM	CLIENT	SITE	AREA	DATE	COST
DRIVE	R: Duncan Ross				
01004002 - Single Toilet Unit, Blue Loo, 202	PE0002 - Peterson Construction	PE0002/001	Mossel Bay Business District	12 October 2022	34.69
01004001 - Single Toilet Unit, Blue Loo, 201	PE0002 - Peterson Construction	PE0002/001	Mossel Bay Business District	12 October 2022	35
01001001 - VIP Toilet Trailer, Blue Loo, 101	PE0002 - Peterson Construction	PE0002/001	Mossel Bay Business District	12 October 2022	40

The Hygiene Service Report

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•			×
н	ygiene Servi	ice History	Report Options
Driver:	٩	Clear	Select Date Range 🔽
Client:	٩	Clear	From: 2022/10/11 🗨
Item:	٩	Clear	To: 2022/10/13 💌
Area:	٩	Clear	Sort By: Driver
	options to filter Report Re ad and more than one filte	C Detailed C Summary Cancel Accept	

Selecting the 'Summary' option before clicking 'Accept', the report is displayed as follows:

Hygiene Service Report

Time Period of Report: 11 October 2022 to 13 October 2022

Time and date report was printed: 13 October 2022 10:23:20

SITE NUMBER	CLIENT	SITE DESCRIPTION	AREA	TO SERVICE	DRIVER	DATE
PE0002/001	PE0002 - Peterson Construction	Apartment Construction	Mossel Bay Business District	3	Duncan Ross	2022/10/12



Novtel Ablution	Hire Ultima	te Standard (6.9.0.2 - [lte	m Grid]		
File Edit M	TODAY	ip Process	Reports	Hygiene Service Reports Hygiene Route Sheet		
	10 Oct 2022	11 Oct 2022	12 Oct 2022	Hygiene Re-Schedule Audit Log Hygiene Doc Number Reporting	2	
01001001 🔍	Mon	Tue	Wed	Ablution Hire Details		
01001001		3 Peters	on Constru	Activity	>	
01001002		7 Peters	on Constru	List Of Availability		

Ablution Hire × 2022/10/11 🔻 To 2022/10/14 💌 From Cancelled Provisional Confirmed 🔲 On Rent \checkmark Returned \checkmark 📃 Non Rev Г Accept Cancel

This report can be obtained for a specified period and status option, and lists:

- \checkmark Contracts for the selected period
- \checkmark The Items linked to it
- ✓ The Start and Expected End Date
- ✓ The Contract's current Status
- ✓ And if captured, remarks added to the Hygiene Details window

Ablution Hire Details

PRINTED DATE: 13 OCTOBER 2022 TIME: 10:32:32

PRINTED FOR PERIOD: 11 OCTOBER 2022 TO 14 OCTOBER 2022

VOLUME	HIRE #	ITEM	START DATE	EXPECTED END DATE	STATUS	REMARKS
CONTRACT:	3	CLIENT: PE0002 - Peterson Construction				
3	7	01001002 - VIP Toilet Trailer, Blue Loo, 102	2022/10/11	2022/10/13	On Rent	
3	8	01004003 - Single Toilet Unit, Blue Loo, 203	2022/10/11	2022/10/13	On Rent	

The Hygiene Document Number Report



The 'Hygiene Doc Number Reporting' option, produces a detailed report for the selected period, which lists the following information per Item serviced:

✓ The Item's Plant Number

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- \checkmark The date upon which it was serviced
- ✓ The Customer linked to the contract to which this Item is linked
- ✓ The Service Agent on the Day
- \checkmark The service amounts
- ✓ The Area Code and Site Address
- ✓ The Hygiene Service Instruction document printed for the Service Agent to complete
- ✓ The Contract Number
- ✓ And the Invoice Number linked to the Item



Hygiene Doc Number Reporting

PRINTED DATE: 13 OCTOBER 2022 TIME: 10:36:28

PRINTED FOR PERIOD: 11 OCTOBER 2022 TO 14 OCTOBER 2022

PLANT#	SERVICE DATE	CLIENT		SERVICE AMOUNT	AREA CODE	SITE ADDRESS	DOCUMENT NUMBER	VOLUME#	INVOICE
202	12 October 2022	PE0002 - Peterson Construction	Duncan Ross	34.69	MCBD	West Street, Mossel Bay Golf Estate, Mossel Bay, 6500,	SI000001	2	GI000002
201	12 October 2022	PE0002 - Peterson Construction	Duncan Ross	35	MCBD	West Street, Mossel Bay Golf Estate, Mossel Bay, 6500,	SI000001	2	GI000002
101	12 October 2022	PE0002 - Peterson Construction	Duncan Ross	40	MCBD	West Street, Mossel Bay Golf Estate, Mossel Bay, 6500,	SI000001	2	GI000002
204	13 October 2022	PE0002 - Peterson Construction	James Howard	35	MECO	56 Yellow Road, Monte Cristo, 6533,	S1000005	4	
204	13 October 2022	PE0002 - Peterson Construction	Duncan Ross	35	MECO	56 Yellow Road, Monte Cristo, 6533,	S1000003	4	
203	13 October 2022	PE0002 - Peterson Construction	James Howard	35	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	S1000006	3	
102	13 October 2022	PE0002 - Peterson Construction	James Howard	40	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	S1000006	3	
203	13 October 2022	PE0002 - Peterson Construction	Duncan Ross	35	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	S1000004	3	
102	13 October 2022	PE0002 - Peterson Construction	Duncan Ross	40	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	S1000004	3	

The Hygiene Re-Schedule Audit Log Report

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Equipment Hir

	S	ervice Due		On Service	Ĭ	Update Servi	ice Y	Next Se
	Code	Description	Hire #	Area	Serv Due Date	Instructions	Customer	Delivery Address
]	01004004	Single Toilet Unit, Blue Loo, 204	10	Monte Cristo	2022/10/15	maductions	PE0002 - Peterson Con	56 Yellow Road, Mont
i	01001002	VIP Toilet Trailer, Blue Loo, 102	7	Voorbaai	2022/10/15		PE0002 - Peterson Con	
1	01004003	Single Toilet Unit, Blue Loo, 203	8	Voorbaai	2022/10/15		PE0002 - Peterson Con	
2. >	> Add Instruct > Site Sequer	nce 2022/10/14 - Re	Deselect all Schedule Item	Display Option View by Site View by Item Co Reprint Transac	o S de c S	earch Filter how All r pecific Day C		

Please note that the 'Hygiene Re-Schedule Audit Log' report can be produced, but will only list items re-scheduled from the 'Hygiene Maintenance – On Service' tab.





The Hygiene Re-Schedule Audit Log Report

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Equipment Hi





To print the 'Hygiene Re-Schedule Audit Log' report, access this option from the 'Reports' menu.

Select the date range to be viewed and click 'Accept'.

The report lists all items re-scheduled, as well as the User who has performed the task, and the reason for re-scheduling.

Re-Schedule Audit Log									
PRINTED DATE: 13 OCTOBER 2022 TIME: 10:46:07 PRINTED FOR PERIOD: 13 OCTOBER 2022 TO 14 OCTOBER 2022									
ITEM SITE DRIVER DATE TO LOG DATE LOG USER REASON									
01004003 - Single Toilet Unit, Blue Loo, 203	PE0002/005		15 October 2022	14 October 2022	13 October 2022 10:44:15	Danny	Client requested that the item is only serviced tomorrow.		

CONOVIC Ablution Hire

Setup Procedures

Page 84

14

TEI Restrooms

www.freepik.com/photos/excavator'>Excavator photo created by onlyyouqj



To successfully set up your system, there are various procedures to perform first, and careful planning is advised.

We recommend that your Company's Accountant, or person with extensive knowledge of the financial system be involved in the setup of the GL Accounts; Inventory Groups; Entry Types, etc. These must be linked to Novtel to ensure that transactions are posted correctly.

USERS AND PASSWORDS

From the 'Setup' menu, Usernames and Passwords are set up for the following types of Users:

- ✓ **Administrators** with full access to the setup procedures.
- ✓ **Shop Users** to access the dedicated Retail POS system ONLY.
- ✓ Supervisors to open and manage User Shifts; To give permission for certain actions in the system when the Supervisor Password is required, and to post shifts to the financial system.
- ✓ **Custom Users** for which certain permissions are deactivated.

Shifts are to be opened for all Users actively working on the system, for transactions to be linked to their Username and Shift Number – thus creating a complete audit trail.





Equipment Hit

Setup Procedures

Company Setup



mpany Setup					
Company Details	General	Financial	Access Control	Preferences	Images
		Namo :	Hygiene Experts		
			044 123456		
		Fax:	-		
			082 123456		
			1002 123430		
		Company Email :	44 Green Earth Street		
		Address :	Bellville		
			Cape Town		
			8000		
		(for this computer).	experts@hygiene.co.za		
		Computer Location :	Admin Office		
		Use Branch Address			
		This Database Manages:	Ablution Hire		
			Novel Delapir (All in One)		
			Equipment Hire Plant Hire		
			Event Hire Suit Hire		
			Container Hire		
			Ablution Hire Gas Cylinder Hire		
		Acce	pt Cancel		

COMPANY SETUP

From the 'Setup - Company' menu option, the following details can be set up:

Company Details Tab

The company's contact details are to be inserted here and will be displayed on all system documents.

IMPORTANT!

By selecting the 'Ablution Hire' option, the relevant setup and management options – pertaining to the Hygiene Industry - will be activated in the various menus.



Company Setup

Common Salua					×	
Company Setup					^	
Company Details General	Financial	Access Control	Preferences	Images		Setup Con
Activate Access Control	60 Seconds 15 35 Yes (° No Yes (° No Yes (° No	Allow Rentals to overla Allow Grace Period of Allow Backdated Retur Force Plant No. to Cos Force Customer Code / Increment Hire Days on Su	n of 0 day/s Code Adjective (Branches) and (Checked = Charge)	Ē		In this tab, your system Also note
Force Agent Commission	Yes r No	Activate Sundays on Item L Increment Hire Days on Saturd Activate Saturdays on Item Increment Hire Days on Patho Activate Holidays on Item L Activate Holidays on Item L Activate Workly Rates Activate Weekly Rates on I	turday (Checked = Charge) ay (Checked = Charge) Level blic Holidays (Checked = Charge) evel as	Setup Holidays		print Servi
Short Rent Value (If 55% enter 0.55)		Cross Hire Branch	No Branch,	-		
Require Supervisor Password for Hire Item Remu Allow - Cancel Hire Items with outstanding Balan Allow Additional Costs Posting only for On Rent S Allow changing Status to On Rent for Future ren Activate Novtel Online Bookings Activate Demo Mode Overnide Credit Limit Check	ce Status	Cash Customer Category Encre use of Customer Email Print Hygiene Slips Allow Contract Discount Allow Item Remove (More tha Allow Multiple off-hire Days				
Return Deposit Container only if selected	Company Setup					
Allow only Permanent Branch transfers Allow Work Order creation at Branch level	Company Details	General	Financial	Access Control	Preferences	Images
	Tax Number 123456 Defa 1 · Vat · Standard r	ult Tax Type	(AANNNNN)	i000001	Own Currency to be Display Foreign Currency to be Displ 1 = ???	· · · · · · · · · · · · · · · · · · ·
		iervice Charge 0 % Clea				
	<u> </u>		Allow Negative Discour	nt if Applicable		
	Invoiced Service Charge C	ode - Link to Charge Code	Settlement Discount	ent Discount Scale		
	Update Cost/Selling Prices Round Cost/Selling Price t	to next		ounts have been paid in full.		
	Example: 0.05 (0.33 to 0.3 Default Markup Percentag	ie 0	C Apply Settlement Discour previous outstanding and	nt for current month, with ounts payable in full.		
	Update Customer Invoices Next Invoice Number Form (AANNNINN) Invoice Date Method Invoice Adjective	Update Date	*Settlement Discount to	nt is sent to Customer, the		
	Next Credit Note Number Format (AANNNNN)	CN000001		Cancel		
			Accept	Lancel		

Setup Company - General Tab

n this tab, a host of settings can be entered and selected to determine how our system will function.

Also note that the option to 'Print Hygiene Slips' must be ticked in order to print Service Instructions for the Service Agent's attention.

Setup Company - Financial Tab

Here, your company's Tax number and default tax type is set; Document Numbers set; the use of the suggested deposit activated or de-activated; and settlement discount scales set up.

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Equipment Hir

Company Setup

🥐 Novtel Equipment Hire	e (All in (One) Ultim	ate Standa	rd 6.9.0.	2 - [tem	Grid
🧭 File Edit Modify	Setup	Process	Reports	Help			
DEM001 Q DEM001 Q DEM001 Q DEM001 Q View Items by Code Availa Plant No On Re Transfer Mainte Q DEM100 Q DEM100 Q Code CAvaila	In U D C D R Ta A N R	ompany aterfaces ser Defined sers / Pass ocuments ash Drawer atabase Se eminders ag Reader uthorizatio /orkstation ental Day L ompany Po	words r t and Print imits	ers	>		28 Seq 202 We User Jser Jser Jser Jser

COMPANY POS SETUP

In the 'Setup Company POS' screen, there are 6 charges to be selected after creating it. These charges are necessary to enable the system user to perform other functions in the system, and the user will not be able to place items 'On-Rent' if these fields are not populated.

Front Desk/Shop Enable Discount Enable Quick Scan Max Discount Percentage Print Access Permit Allow Line Amount Change PDS Invoice / Credit Note to Slip Printer	A	In House Charge POS/Shop In House Charge Code POS/Shop In House Payout/Credit Note State State Stat	Clear Clear
Use Inventory Category Code at Charges For Selection List Use Branch at Charges For Selection List		Late Return Charge Code	
-Work Order Work Order POS Invoice to Slip Printer	V	Replacement Charge Code	Clear
General Posting of Shortages/Over Journal by Supervisor Shift Cashup Hide Shift totals on Money count			Clear
Override Force Change on Account Payments		Repair Charge Code	Clear
		Hygiene Service Charge Code	Clear
r	,		

Document Notes



DOCUMENT NOTES SETUP



Clicking on the 'Setup – Documents' menu option and proceeding to the 'Document Notes' tab:

- 1. A disclaimer can be added to appear on the 'Hygiene Route Sheet'
- 2. Ticking this checkbox, the signature of the Service Agent can be added to the Route Sheet
- 3. A Custom image can be added to the bottom of the Hygiene Route Sheet by selecting the path for it in this field

🇭 Documents Setup					×
Invoices	Letters	Word Documer	its	Documents Notes	Work Orders
Note To Be Displayed On Cus	stom Invoice	^	Hygiene Route	e Sheet (HTML) Disclaimer	1
		~			~
Note To Be Displayed On Pro	visional Invoice	<u>^</u>	Add Driver	Signature To Route Sheet	2
		~ ~	Hygiene Rou	ite Sheet Custom Bottom Im	nage Path: 3
Note To Be Displayed On Cus	stomer Invoice				_
		^	-	onsolidated Invoice Notes-	
Note To Be Displayed On Qua	atations	¥	User Defi	ned Field 1	
	J. G.	^	User Defi	ned Field 2	
Terms and Conditions		¥	User Defi	ned Field 3	
		<	User Defi	ned Field 4	
		Accept Can	el		

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Branches

Novtel Equipment Hire (All in One) Ultimate Standard 6.9.0.2 - [Item Grid]									
🥐 File	Edit	Modify	Setup	Process	Reports	Help			
2		ltem	6 7 7						
		Customer	s						
		Suppliers	27 Sep	28 5ep	29 Sep				
DEMI		Branches					2022 Tue	2022 Wed	2022 Thu
DEMO		Charges							
		Item Tariffs							
	Contract (Cash)								
View ⊙ C		Contract (Account	t)				N	lobile Ph

Branches		×
Demo Mossel Bay Mossel Bay Mossel Bay Mossel Bay	South Africa Cross Hire Main Branch Maintenance Branch Redundant Branch	Assigned Colour
Add New	Edit Delete Sync	nchronization Close

BRANCHES SETUP

Multiple Branches can be set up in the Novtel system. A Branch can refer to different towns or cities; countries; a Maintenance Branch to which items can be transferred and serviced; repaired or discarded, and sub-hire branches where items can be sourced from and sub-rented by your company.

Users are linked to specific Branches to which they must have access.

Items are linked to specific Branches and will be accessible from this branch only – unless transferred to another branch.

From the 'Edit' menu Branches can be added.

Specific contact details can be added per branch, as well as other custom settings.

Edit Branch					
issigned Colour	Branch	Main Branch	Sub-Hire Branch		Mossel Bay, Cross Hire
Fax: 1234 e-mail: louise	@novtel.com	Dedicated Cashier Dedicated Invoice User Maintenance Branch Synchronization To Externa	l Master Database	Address :	
Maintenance Customer All Maintenance by Ex Maintenance Supplier	ternal Supplier	enance Customer al Maintenance		Multi-Store : Maintenance Select Sellin	001 Q Default Store e MultiStore : 001 Q Default Store ig Price Set Main
- Default Cashbook Entr Cash : Credit Card : Cheque : Bank Transfer :	0 Q Daily T 0 Q Daily T 0 Q Daily T	aking Control 8600/000 aking Control 8600/000 aking Control 8600/000 aking Control 8600/000		Customer Co (Leave blank to Inventory Ca 000 - No ca	ouse the first characters of Surname or Company) Negory



CHARGES SETUP

An unlimited number of charges can be created. Charges are linked to contracts and the Customer is billed according to whatever was used.

Examples of 'Hygiene Fixed Items' may include the following:

- ✓ Waste Bins
- ✓ Soap Dispensers
- ✓ Toilet Roll Holders
- ✓ Hot Air Dryers
- ✓ Paper Towel Dispenser

Please note that 'Hygiene Consumables' are also set up as charges. Later, we will explain how to link the charge code to an actual 'Hygiene Consumable' master file as the second part of this setup process.

Hygiene Consumable charges may include the following:

- ✓ Liquid Hand Soap
- ✓ Toilet Paper
- ✓ Air Fresheners
- ✓ Sanitizers
- ✓ Folded Paper Towels



Novte	🗭 Novtel Equipment Hire (All in One) Ultimate Standard 6.9.0.2 - [Item Gr								
🥐 File	Edit	Modify	Setup	Process	Reports	Help			
0		ltem					C.		
		Customer	s					•	
		Suppliers					27 5ep	Π	
DEMI		Branches					2022 Tue	2	
DEMO		Charges							
		Item Tariff	s						
		Contract (Cash)						

🌔 Charge Setup		Х
		_
Code	Description Amount	-
1		
Sort By Code	Search Search	
Code		
Description		
	· · · · · · · · · · · · · · · · · · ·	
Charges	1	
Add New	Edit Delete Close	

Other applicable charges my include Hygiene Service Charges for different sized rentable units, for example:

- ✓ Service VIP Toilet Trailers
- ✓ Service VIP Shower / Toilet Combo
- ✓ Service 12 Toilet Trailer
- ✓ Service VIP Paraplegic Toilet Trailers
- ✓ Service Single Toilet Units
- ✓ Service 3 Shower Trailer
- ✓ Delivery Charge

Please note that any charge applicable to your company can be set up. Charges are created by clicking on the 'Edit – Charges' menu option.

Click 'Add New' to continue.



1. Charge Code

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A unique alpha-numeric code must be created per charge. For example: a 3-letter alpha code followed by a 3-digit numeric code inserted as 'LHS001'.

2. Description

The charge description in this case, is entered as 'Liquid Hand Soap – 250ml'.

3. Branch

Select the Branch where this charge must be available for selection.

4. Create Item in Pastel

By ticking the checkbox to 'Import Item to Pastel', the item will automatically be imported in Pastel upon saving the charge without it having to be created manually in **both** systems.

5. Display on Invoice

For this charge to be displayed on the Customer Invoice, this checkbox must be selected

🌔 Add New Charge			×
1 Code 2 Description	LHS001 Liquid Hand Soap - 250ml	-	Create Item In Pastel Display On Invoice
Barcode		6	Physical Item
External Reference		Γ	Blocked
3 Branch 📃	Mossel Bay, Main Branch	.	Serial Number Item

6. Physical Item

Any item bought by your company to be re-sold, must be classified as a 'Physical Item'

7. Serial Number Item

Charges can be classified as a 'Serial Number Item'.

As unique serial numbers are allocated per physical item, a standard serial number cannot be entered on the Charge Master File.

However: When a charge – classified as a 'Serial Number Item' - is sold from the POS system, and a serial number has not been captured, Novtel will indicate for which line or lines a serial number is required.



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🙌 Add New Charge		×
Code Description	LHS001 Liquid Hand Soap - 250ml	 ✓ Create Item In Pastel ✓ Display On Invoice
Barcode External Reference		Physical Item
Branch	Mossel Bay, Main Branch 💌	Blocked Serial Number Item
Ger	eral	Properties
Allow Tax 🔽	1 - Vat - Standard rated (14%)	-
Cost Price Excl	0.00 Markup % 0.	.00
Rate Incl	15.00 Charge Excl 13.	.16
User De User De User De	fined Field 1 fined Field 2 fined Field 3 fined Field 4 fined Field 5	
Pastel Inventory Cod	e 10	٩
Multi Store code for n	etrieving Cost Price	
Inventory Category	001 - Hygiene Consumables 001 - Hygiene Consumables 002 - Toilet Roll Holders 003 - Hand Hygiene Dispensers 004 - Hand Dryers 005 - Waste Bins	

8. Allow Tax

Where tax is applicable, this checkbox must be selected. Novtel will also indicate the Standard VAT rate as selected in the 'Company Setup – Financial' tab.

9. Rate Including VAT

Entering the rate – inclusive of VAT - at which the item is to be sold, Novtel will calculate and insert the amount exclusive of VAT.

10. Pastel Inventory Code

When the 'Create Item in Pastel' checkbox is selected, this field is left blank, since Novtel will automatically insert the Pastel Inventory Code after importing the charge to the financial system.

11. Inventory Category

If set up in the financial system and imported to Novtel, a custom Inventory Category can be selected here to which the charge is to be linked.

Charges



2	Sep 2022	Sep 2022	Add New Charge X	Oct 2022	Oct 2022
	Tue	Wed	Code LHS001 ✓ Create Item In Pastel Description Liquid Hand Soap - 250ml ✓ Display On Invoice	Fri	Sat
		M	Barcode 🔽 Physical Item		
1	lmp	ort Inve	ntory Item		×
	Inve	C Descrip entory Gro Selling P			
			Multi-Store Select All Multi-Stores Selected Multi-Stores	¢ C	
			Accept Cancel Multi Store code for retrieving Cost Price Inventory Category 001 - Hygiene Consumables Accept Cancel		

Importing the Charge to Pastel

Upon clicking 'Accept', the 'Import Inventory Item' screen is displayed, and the code, description and selling price exclusive of VAT is indicated here. The 'Physical Item' option is also selected.

Now simply select the applicable 'Inventory Group' and click 'Accept'.

	Import Inventory	ltem			×
	Code Description	LHS001 Liquid Hand Soap - 250ml		Code Description © 001 Default Store	
J.	Inventory Group	002 - Inventory Goods	•		
	Excl Selling Price	002 Inventory Goods 003 VIP Toilet Trailer 004 Paraplegic Toilet Trailer 005 12 Toilet Trailer 006 Single Toilet Unit 007 2 Shower Unit 008 4 Shower Unit			
L		009 · VIP Combo	~	Multi-Store Select	-
1				All Multi-Stores	۹
				Selected Multi-Stores	C
		Accept Ca	ncel		

Charges



()	harge Setup			×
				_
	Code	Description	Amount /	^
	7001001	VIP Toilet Trailer, Blue Loo, 101	100.00	
	7001002	VIP Toilet Trailer, Blue Loo, 102	100.00	
	7001003	VIP Toilet Trailer, Blue Loo, 103	100.00	
	7001004	VIP Toilet Trailer, Blue Loo, 104	100.00	
	7001005	VIP Toilet Trailer, Blue Loo, 105	100.00	
	7002001	Paraplegic Toilet Trailer, Blue Lo	200.00	
	7002002	Paraplegic Toilet Trailer, Blue Lo	200.00	
	7002003	Paraplegic Toilet Trailer, Blue Lo	200.00	
	7002004	Paraplegic Toilet Trailer, Blue Lo	200.00	
	7002005	Paraplegic Toilet Trailer, Blue Lo	200.00	
	7003001	12 Toilet Trailer, Blue Loo, 301	300.00	
	7003002	12 Toilet Trailer, Blue Loo, 302	300.00	
	7003003	12 Toilet Trailer, Blue Loo, 303	300.00	
	7004001	Single Toilet Unit, Blue Loo, 401	50.00	
	7004002	Single Toilet Unit, Blue Loo, 402	50.00	
	7004003	Single Toilet Unit, Blue Loo, 403	50.00	
	7004004	Single Toilet Unit, Blue Loo, 404	50.00	×
Sor	t By Code	 Search 		_
30	rby [code	- Search		
	- ·			
	Code			
	Description			
	Decemption	I		
	Charges			
	Add New	<u>E</u> dit <u>D</u> elete		

The charge has now been created successfully, and all other relevant charges can now also be created by entering and selecting the applicable settings.

When done, click 'Close' to exit.

A report can be produced, listing all created Charges in the system by clicking 'Reports – List – Charges'.



Charges

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Equipment Hire

Hygiene Consumables



HYGIENE CONSUMABLES

As said previously: 'Hygiene Consumables' are created as charges first.

The second part of this setup process is to click on 'Edit – Hygiene Consumables' and click 'Add' in the next screen.

By clicking on the search option in the 'Code' field', the list containing all precreated charges in the system, will be displayed.

Search for and select the first applicable charge to be set up as a Hygiene Consumable Item. In this case, we will select the 'Liquid Hand Soap' charge by double clicking on it.

Code	Description	Abbreviation
	🖏 Add Hygiene Consumable	– 🗆 X
	Code	Abbreviation
	Description	
		Accept Cancel
Add	Edit Delete	Close

Code	Description	Excl	Tax	Incl	^	Accept
09001002	VIP Combo Trailer, Blue Loo, 602	260.87	39.13	300.00		
09001003	VIP Combo Trailer, Blue Loo, 603	260.87	39.13	300.00		- ·
09001004	VIP Combo Trailer, Blue Loo, 604	260.87	39.13	300.00		Cancel
09001005	VIP Combo Trailer, Blue Loo, 605	260.87	39.13	300.00		
AIR002	Air Freshener - Lavender 100ml	17.39	2.61	20.00		
AIR003	Air Freshener - Orange Blossom 100ml	17.39	2.61	20.00		
AIR004	Air Freshener - Forest 100ml	17.39	2.61	20.00		
AIR005	Air Freshener - Ocean Fresh 100ml	17.39	2.61	20.00		
DST001	Discount Settlement	0.00	0.00	0.00		
FOR001	Forfeiture Charge	0.00	0.00	0.00		
FPT001	Folded Paper Towels - 250	31.30	4.70	36.00		
HAD001	Hot Air Dryers	512.17	76.83	589.00		
HYG001	Hygiene Service Charge	0.00	0.00	0.00		
HYG002	Hygiene Service Charge	0.00	0.00	0.00		
INH001	POS and Shop Transaction	0.00	0.00	0.00		
INI001	POS In-House Charge	0.00	0.00	0.00		
LAT001	Late Return Charge	0.00	0.00	0.00		
LAT002	Late Return Charge 🥢 🥒	200.00	0.00	200.00		
LHS001	Liquid Hand Soap - 250ml	13.16	1.84	15.00		
PTD001	Paper Towel Dispenser	313.04	46.96	360.00	_	
REP001	Replacement Charge	0.00	0.00	0.00		
REP002	Repair Charge	0.00	0.00	0.00		
	Replacement Charge	0.00	0.00	0.00		
REP003	Repair Charge	0.00	0.00	0.00		
REPOO3 REPOO4	nepai charge			15.00		



Hygiene Consumables

🖏 Add Hygier		×		
Code	LHS001	Abbreviation	SOAP	
Description	Liquid Hand Soap - 25	Oml		
		Accept	Cano	cel

The charge's code and description are now linked to this item, and we only need to enter a custom abbreviation in the field provided (Maximum of 13 characters), before clicking 'Accept'.

Hygiene Maintanance elect Area : X · All Areas	<u>_</u>	Branch	Mos	sel Bay, M	ain		•	Servio	e Agent	:		٩		×
Service Due	(On Service	Ĩ		Update S	ervice	ľ		Next Se	rvice	ľ	Servic	ce History	
Description	05	Due Date	AFVa	AF La	AF Or	AF Fo	AF 0	Towels	Soap	SAN	Tpa			
Select All Print to : Screen Print		Deselect		Display Op View by S View by It	ite	ء ۲	Show	h Filter Details Consumab iic Service		с с Г	<u>}</u>		Close	

Please note that this 'Abbreviation' appears on the 'Hygiene Maintenance – On Service' tab when the 'Show Consumables' option is selected.



Hygiene Consumables

0	Hygiene Consum	able Setup		×
	Code	Description	Abbreviation	
	LHS001	Liquid Hand Soap - 250ml	SOAP	
	Add	E dit Delete	Close	
_				_

The first Hygiene Consumable is now created.

Simply repeat the process until all applicable Hygiene Consumables are linked to the corresponding Charge.

Hygiene Consu	imable Setup		×
Code	Description	Abbreviation	
LHS001	Liquid Hand Soap - 250ml	SOAP	1
AIR002	Air Freshener - Lavender 100ml	AF Lavender	1
AIR003	Air Freshener - Orange Blossom 100ml	AF Orange	1
AIR005	Air Freshener - Ocean Fresh 100ml	AF Ocean	1
SAN001	Sanitizer - toilet block	T Block	1
TPR001	Toilet Paper per Roll	T Paper	1
Add	Edit Delete	Close	



□ ITEM CATEGORIES AND SUB-CATEGORIES

Item Categories are to be created, as well as Sub-Categories to be linked to a main category.

These are required fields to be populated when creating an Item. The Sub-Category also forms part of the Item Description, and therefore it is important to enter a clear and descriptive Category and Sub-Category name in the 'Description' field.

Examples of Item Categories and Sub-Categories may include the following:





Res.

Equipment Hit

Item Categories and Sub-Categories



-Search

Add

Edit

Delete

Add Sub-Category

Close

To start the process of first creating a main category, click 'Edit – Item Category / Sub-Category', and click 'Add' in the next screen.

 \times

By default, the 'Update Inventory Category to Item' checkbox is ticked. This will cause the Inventory Category linked to the Main Category below, to be updated to any item this Main Category is linked to.

Enter the description for the Main Category and select the 'Inventory Category' as created in the financial system to which this Category is to be linked before clicking 'Accept'.

🚸 Add Item Category		×
	Update Inventory Category To Item	v
Description	Toilets	
Inventory Category	07 - Toilets 02 - Toilet Roll Holders 03 - Hand Hygiene Dispensers 04 - Hand Dryers 05 - Waste Bins 06 - Service	• ^
Search	07 - Toilets 08 - Showers 09 - Toilet/Shower Combo	*



Item Categories and Sub-Categories



This Main Category has now been created successfully.

For demonstration purposes, we will now select this main Category and click on the 'Add Sub-Category' button to link various 'Sub-Categories' to this main one.

The selected Main Category is displayed at the top of this window, and to create the first 'Sub-Category' linked to it, click 'Add'.

🥬 Edit Item Category	,	······································
Code	1	Update Inventory Category To Item 🛛 🔽
Description	Toilets	
Inventory Category	07 · Toilets	•
	ITEM SUB-CATE	GORY
Code Description		Category Description
Add	Edit	Accept Cancel



🐢 Add Item Sub-Cate	egory					×
Code 1 Item Category 2 Description 3	0 1 VIP Toilet Traile	Toilets er			Rain Day / Off-Hire Item Charge on Saturday Saturday Half Day	
Tax: 🧿	15 - Vat - Stan	dard rated (15%	:)	•	Charge on Sunday Charge Public Holiday	
Price Per Day 🧃	Including 100.00	TAX 13.04	Excluding 86.96		Charge Weekly Rate Maintenance Item	
Price Per Week	0.00	0.00	0.00		Service Every	0 Days/h
Price Per Month	2500.00	326.09	2173.91		Update Default To Item	
Price Per Hour	0.00	0.00	0.00			
Price Per Service	50.00	6.52	43.48	6	Update Prices to Item	\checkmark

1. Code

At present, no code has been allocated to this Sub-Category yet since it has not yet been saved.

2. Item Category

The Item Category has been inserted automatically as selected previously.

3. Description

Enter a descriptive name for this Sub-Category to distinguish it from the rest of the Sub-Categories to be created.

4. Tax

The tax rate, as set up in the 'Setup – Company – Financial' tab is displayed in this field.

5. Price Setup

Daily, weekly, monthly and / or per hour rates can be set up if applicable. A default price per service can now also be inserted.

6. Update Price to Item

Selecting the 'Update Price to Item' checkbox, the prices will be linked to the item's master file



🚸 Add Item Sub-Cat	egory				×
Code Item Category Description Tax:	0 1 VIP Toilet Traile 15 - Vat - Stand		Excluding	 Rain Day / Off-Hire Item Charge on Saturday Saturday Half Day Charge on Sunday Charge Public Holiday Charge Weekly Rate	
Price Per Day Price Per Week Price Per Month	100.00 0.00 2500.00	13.04 0.00 326.09	86.96 0.00 2173.91	Maintenance Item Service Every Unit Days Update Default To Item	▼9 1.00 Days/h ▼
Price Per Hour Price Per Service	0.00	0.00 6.52	0.00	Update Prices to Item	v

The following defaults are now to be set up and can be updated to the Item itself by ticking the 'Update Default to Item' checkbox.

7. Rain Day / Off Hire Item

Should this checkbox be selected, the item this sub-category is linked to, will not be charged if a specific day was marked as a 'Rain Day / Off Hire Item'.

8. Charge on...

If activated in 'Company Setup', items can be fully charged on a Saturday – or half day on a Saturday – Sundays, Public Holidays, etc.

The applicable options can now be selected here

9. Maintenance Item

Items can be classified as a 'Maintenance' item, and if it is to be serviced, the number of days or hours between services are selected.

The 'Unit' is then also to be selected according to the requirement.



Add Item Sub-Ca	tegony					X				
Add item 505-Ca	legoly					16 Oct	17 18 Oct Oct	19 Oct	20 Oct	21 Oct
Code	0					2022 Sun	2022 2022 Mon Tue	2022 Wed	2022 Thu	202
Item Category	1	Toilets		Rain Day / Off-Hire I						
	<u> </u>	1		Charge on Saturday						
Description	VIP Toilet Traile	er		Saturday Half Day						
Tax	15 - Vat - Stand	dard rated (15%)	•	Charge on Sunday Charge Public Holida						
		• •	Fueluding	Charge Weekly Bate						
	Including	🔴 Select C		I CHAILE WEEKIVHALE						;
Price Per Day	100.00	T Belect C	narge							
Price Per Week	0.00	Code	Description		Excl	Tax	Incl	~	Acce	nt
		FPT001	Folded Paper Towels - 250		31.30	4.70	36.00	_		P^
Price Per Month	2500.00	HAD001	Hot Air Dryers		512.17	76.83	589.00			
Price Per Hour	0.00	HYG001	Hygiene Service Charge		0.00	0.00	0.00		Cano	el:
	0.00	HYG002	Hygiene Service Charge		0.00	0.00	0.00	_		
Price Per Service	50.00	INH001	POS and Shop Transaction		0.00	0.00	0.00			
	00.00	INI001	POS In-House Charge		0.00	0.00	0.00			
- Hvaiene Service C	harge Code	- LAT001	Late Return Charge		0.00	0.00	0.00			
		- LAT002	Late Return Charge		200.00	0.00	200.00			
	Q	LHS001	Liquid Hand Soap - 250ml		13.16	1.84	15.00			
		PTD001	Paper Towel Dispenser		313.04	46.96	360.00			
		REP001	Replacement Charge		0.00	0.00	0.00			
C	0.00	X REP002	Repair Charge		0.00	0.00	0.00			
Suggested deposit	0.00	REP003	Replacement Charge		0.00	0.00	0.00			
Weight		REP004	Repair Charge		0.00	0.00	0.00			
		SAN001	Sanitizer - toilet block		13.04	1.96	15.00			
		SCE001	Service Charge		0.00	0.00	0.00			
Detailed Description	:	🚬 SDR001	Soap Dispenser		217.39	32.61	250.00			
		SER001	Service - VIP Toilet Trailor		43.48	6.52	50.00			
		SER002	Service - VIP Shower/Toilet Co	ombo	86.96	13.04	100.00			
		SER003	Service - 12 Toilet Trailer		260.87	39.13	300.00			
		SER004	Service - VIP Paraplegic Toilet		43.48	6.52	50.00			
		SER005	Service - Single Toilet Unit		34.78	5.22	40.00			
		SER006	Service - 3 Shower Trailor		86.96	13.04	100.00			
		TPR001	Toilet Paper per Roll		2.17	0.33	2.50			
		TRH001	Toilet Roll Holders		152.17	22.83	175.00	×		
1		Search By								
		Code	•	Search For						
				,						

As this 'VIP Toilet Trailor is to be serviced daily, as per our settings, the applicable 'Hygiene Service Charge Code' is to be selected.

By clicking on the search option here, the window containing all of the pre-created charges in our system, is opened.

The specific charge can now be searched for, and selected by double clicking on it.



Item Categories and Sub-Categories

Add Item Sub-Ca	tegory					×
Code	0	1			D.: D. 10((1)) h	_
Item Category	1	Toilets			Rain Day / Off-Hire Item Charge on Saturday	
Description	VIP Toilet Traile	er			Saturday Half Day	
Tax:	15 - Vat - Stand	lard rated (15%)		-	Charge on Sunday Charge Public Holiday	V
	Including	TAX	Excluding		Charge Weekly Rate Maintenance Item	
Price Per Day	100.00	13.04	86.96			1.00 Days/h
Price Per Week	0.00	0.00	0.00		Unit Days	
Price Per Month	2500.00	326.09	2173.91		Update Default To Item	
Price Per Hour	0.00	0.00	0.00			
Price Per Service	50.00	6.52	43.48		Update Prices to Item	
Hygiene Service C	Charge Code					
SER001	٩	Service - VIP T	oilet Trailor		Clear	
Suggested deposit	10.00	X Price				
Weight	1 320.00				Update Weight to Item	\checkmark
Detailed Description						
A detailed description		-Category' can	now be entered in	this field, for ex	ample:	
Total Size: 8 x 3m 2 Toilet Unit each w						
To be serviced daily	γ.		ser, roidea paper ((meis and mast	ebin.	
Consumables to be	supplied by our co	ompany.				
				•	Accept Can	cel

10. Suggested Deposit

Deposits are normally raised and are payable on items to be rented, and if activated in the Company Setup, the 'Suggested Deposit' field will be displayed here.

The daily rate set up for this Item Sub-Category, is R100.00 per day. By entering the number of days as 10 for example, the deposit amount to be raised on the contract when an item is selected which is linked to this Sub-Category, will be indicated as R1000.00.

11. Weight

The weight of this Item Sub-Category (VIP Toilet Trailor) can be entered here and updated to the Item itself.

12. Detailed Description

A detailed description of the 'Item Sub-Category' can now be entered in this field, for example:

Total Size: 8 x 3m

2 Toilet Unit each with own basin, mirror, soap dispenser, folded paper towels and wastebin.

To be serviced daily.

Consumables to be supplied by our company.

To save the changes and to create this Item Sub-Category, click 'Accept'.



Item Categories and Sub-Categories

🐠 Edit It	em Category			×
Code	Code 1 Up		odate Inventory Categ	ory Toltem 🔽
Descrip	otion	Toilets		
Invento	ory Category	07 - Toilets		•
		ITEM SUB-CATEGOR	Y	
Code	Description		Category Description	n
1	VIP Toilet Trai	ler	Toilets	
Ac	ld E	dit	Accept	Cancel

This Item Sub-Category has now been created successfully.

To add more Item Sub-Categories to this Main Category, click 'Add' and create it in the same manner as explained previously.

Cancel

Accept

Code Descrip	otion	1 Toilets	Up	date Inventory Category To Item 🕟
	ory Category	07 - Toilets		_
		ITEM SUB-CA	ATEGORY	(
Code	Description			Category Description
3	12 Toilet Trail	12 Toilet Trailer		Toilets
2	Paraplegic Toilet Trailer		Toilets	
4	Single Toilet L	Init		Toilets
1	VIP Toilet Tra	iler		Toilets
1	VIP Toilet Tra	ler		l oilets

Edit

Add

To make changes to an Item Sub-Category, select it and click 'Edit'. Make the changes and save it.



×

We have also created the Item Categories for 'Showers' and 'Toilet/Shower Combo' options and added the applicable Item Sub-Categories to each.

To exit, click 'Close'.


CREATING ITEMS

To rent out the Toilet and Shower trailers or units, it must be created as 'Items'.

If your company has multiple Units of a specific Item, it will be created individually in order to create contracts per unit or trailer.

Either click on the '+' icon or click on the 'Edit' menu and select 'Item'.

Novte	Equir	oment Hire	- (Δll in	One) I	Iltima	te Stan	dard 6	9.0.2 -	[ltem	Grid1		
- T		Modify							[reciri	onaj		
			1111	5 -	+	-			C	X	7	
DEMO	001	Edit Ite	15 <mark>ms</mark> t 2022 Sat	16 Oct 2022 Sun	17 Oct 2022 Mon	18 Oct 2022 Tue	19 Oct 2022 Wed	20 Oct 2022 Thu	21 Oct 2022 Fri	22 Oct 2022 Sat	23 Oct 2022 Sun	
DEMO	001											
		•										
											-	
🂔 Novte	l Equip	oment Hire	e (All in	One) l	Jltima	ite Stan	dard 6	.9.0.2 -	[ltem	Grid]		
🥐 File	Edit	Modify	Setup	Proc	ess	Report	s He	lp				
9		ltem						ł	Ø	. 6	E	
		Customer	s					-		<i>.</i>		
		Suppliers						f	21	22		
DEMI		Branches						- 1	Oct 2022	Oct 2022	2	
		Charges							Fri	Sat		
DEMO		Item Tarif	fs									

Both options give access to the 'Item Setup' screen from where new Items can be added, or existing Items can be edited.

Code	Description	Charge	Plant Numbe
L			
-			
L			
,			
Code		Cost Pric	e
Item Tariff		Rental per day (Ex	clì
		Т	
Plant Number			
	Auto Create	Rental per day (Inc	s)
Search			
Search B	y Plant Number	•	
Search F	or		
	Description		
	Branch 🔲		



Add New Item			
Code	🔽 Create Item In Pastel	Barcode	
Description			

Add New Item						
Code			🔽 Create	e Item In Pastel	Barcode	
Description	, , 101					
General	Petails	Financial	User Defined Fields	Pastel Interface	Kit Items	Fixed Non-Rentals
			1		ome Branch	
	Branch	Mossel Bay, Ma	in Branch 💌	Mossel Bay,	Main Branch 💌	
	Plant Number	101 (2)		Show On	Grid	v

The Code and Description cannot be entered directly in these first two fields.

Novtel creates the Item Description according to the settings entered in the 'Plant Number', 'Sub-Category' and 'Manufacturer' fields.

The Item Code is only created once the Item is saved to the system.

If the Item has not yet been created in the financial system, the checkbox to 'Create Item in Pastel' must be ticked for the item to be imported to Pastel when saving it to Novtel.

The General Tab

In this tab, the following information and settings is to be entered or selected:

1. Branches

The branch logged into will be selected here by default for both 'Branch' options.

The first Branch cannot be changed, but the 'Home Branch' option can be changed if applicable.

2. Plant Number

The 'Plant Number' is allocated as per your company's requirement and must be unique to the item.

By entering this number, it is also automatically entered in the 'Description' field as follows:



etup	Proced	ures
------	--------	------

Add New Item			
Code			🔽 Create I
Description	, Blue Loo, 101		
General	Details	Financial	User Defined Fields
	Branci 📃	Mossel Bay, Mair	n Branch 🗾
	Plant Number	101	
	Serial Number	ABC123 (3)	
	External Reference		
	Manufacturer	Blue Loo 🛛 🌖	
	Туре	Hygiene 5	•
	Item Category	Serial Non-Serial	
	Item Sub Category	Hygiene Plant	
	In Stock	Container	

Add New Item			12 1 Nov N
Code		✓ Create Item In Pastel Barcode	2 2022 20 Sat S
Description	, Blue Loo, 101		
General	Details	Financial User Defined Fields Pastel Interface Kit Items Fixed Non-Rentals	
	Branch 📃	Home Branch Mossel Bay, Main Branch	
	Plant Number	101 Pelect Item Category	×
	Serial Number	ABC123 Code Description	Accept
	External Reference	2 Showers 3 Toilet / Shower Combo	
	Manufacturer	Blue Loo Toilets	Cancel
	Туре	Hygiene	
	Item Category		

3. Serial Number

Where applicable, the Item's serial number is to be entered in this field to keep track of Items owned by your company.

4. Manufacturer

Enter the supplier company / manufacturer of the item in this field. In doing so, it will now form part of the Item's description.

5. Type

Items are to be classified as a specific 'Type', and in this case the 'Hygiene' option is selected from the list of options.

6. Item Category

Clicking on the search option in the 'Item Category' field, the relevant Item Category for this Item is to be selected. In this case, the 'Toilets' option.

Page 111



e

Equipment Hit

簲 Item Category Toilets	×				
Search					
Sort by : Description	•				
Search for :					
,					
Description	Item Sub Category				
12 Toilet Trailer	3				
Paraplegic Toilet Trailer	2				
Single Toilet Unit	4				
VIP Toilet Trailer	1				
Select Cancel					

7. Item Sub-Category

Immediately, the following window is displayed, indicating all Sub-Categories linked to the selected Item Category. Now select the specific option and click 'Select'.

Both the Item Category and Item Sub-Category has now been captured here.

Also note that the Item Description now contains the 'Item Sub-Category's' wording as well.

Add New Item				
Code	VIP Toilet Trailer, Blue Loo, 101		Creat	e Item In
Description				
General	Details	Financial	User Defined Fields	Past
	Branch 📃	Nossel Bay, Mai	n Branch 🗾 💌	
	Plant Number	101		
	Serial Number	ABC123		
	External Reference			
	Manufacturer	Blue Loo		
	Туре	Hygiene	•	
	Item Category	1 💽 To	ilets 🛛	
	Item Sub Category	1 VIF	^o Toilet Trailer	

1

8. In Stock, On Rent and Available

The 'In-Stock' value will ALWAYS be displayed as 1 at this stage, since only 1 item is created and in stock and it is not linked to a contract at present.

Therefore, the 'On-Rent' value is zero, and the Item is 'Available'.

9. Show on Grid

Items are linked to Contracts, and the status of the contract will be reflected on the Grid next to the Item. Therefore, we always recommend that the option is selected to 'Show on Grid'.

10. Maintenance Item

Units such as a VIP Toilet Trailer will require maintenance from time to time. The tyres must be checked; balanced or replaced, and other parts may have to be serviced regularly. Therefore, we have classified this Item as a Maintenance Item.

11. Charge On....

Tick all the relevant checkboxes to charge rent on a Saturday; Sunday and / or Public Holidays.

Add New Item				
Code Description	VIP Toilet Trailer, Blue Loo, 101	ज	reate Item In Pastel Barcode	
General	Details	Financial User Defined Field	s Pastel Interface Kit Items	s Fixed Non-Rentals
			Home Branch	
	Branch 📃	Mossel Bay, Main Branch	💌 📃 Mossel Bay, Main Branch	-
	Plant Number	101	Show On Grid	
	Serial Number	ABC123	Subhire Item	
	External Reference		Monthly Billed Item	
	Manufacturer	Blue Loo	Maintenance Item	
	Туре	Hygiene 💌	Rain Day/Off-Hire Item	
	Item Category	1 Collets		-
	Item Sub Category	1 VIP Toilet Trailer	Charge on Sunday	
	In Stock	1	Charge on Saturday	Z
	On Rent	0	Saturday Half Day Charge Public Holiday	
	Available	1	Charge Public Holiday	
	Kit Quantity	1 Kit Item Master	Kit Item	г
		Accept	Cancel	





Let's first save this Item by clicking 'Accept'. Note the following:

- 1. Novtel has now automatically created the Item Code, and it will be imported to the financial system with the same code and description allocated to it in Novtel.
- 2. The specific Inventory Group it is to be linked to in the financial system, must be selected here.
- 3. The 'Excluding Selling Price' is derived from the daily price entered on the Item Sub-Category and linked to this Item.
- 4. As the item is not to be sold, but rented, it is classified as a 'Service Item'.
- If a 'Cost Code' is to be created for this Item, the checkbox is to be selected. Novtel will automatically populate the Cost Code's 'Code' and 'Description' fields.
- 6. Should the option be activated in your system and Multi-Stores have been set up, the applicable Multi Store this Item is to be linked to, must be selected. However: In this case, no Multi Stores are set up and the 'Default Store' is automatically selected.

To continue, click 'Accept'.



1

Equipment Hire

Item Setur	·			
Code	Description	Charge	Plant Number	
DEM001 01001001	Only for Demo you can Delete th	nis item	0.00	101
	VIP Toilet Trailer, Blue Loo, 101			
Code	01001001	Ba	Cost Prio	
ltem Tariff		ner	ntai per uay (c.x	·
Plant Number	1.1		T.	ах 13.04
	Auto Create	Re	ntal per day (In	cl) 100.00
Search				
Search B	By Plant Number	-		
Search F	or			
	Description VIP Toilet Traile	er, Blue Loo	o, 101	
	Branch 🔲 Mossel Ba	ay, Main B	ranch	
	Add New 🎽 Edit	Dele	te Clo:	se

Our first 'Item' has now been created. To continue editing this Item Master File, click on it, and click 'Edit'.

The Details Tab

Proceeding to the 'Details' tab, all relevant details pertaining to this Item can be captured.

Edit Item						
Code Description	01001001 VIP Toilet Trailer, Blue Loo, 101	Barcode				
General	Details Financial User Definition General Details Tyres Make Image: Comparison of the text of the text of	ned Fields Pastel Interface Kit Items Fixed Non-Rentals Service Interval 0 RD First Maintenance 0 RD Recurring Interval 0 RD Next Maintenance 0 RD RD - Rental Days				
	Accept Cancel					



Edit Item					In the
Code Description General	01001001 VIP Toilet Trailer, Blue Loo, 101 Details	Financial U	ser Defined Fields	Barcode Pastel Interface	Kit Items Cost P
Rental Excl Tax Tax Rental Incl Tax	Cost Price 360000.00 Per Day Per Week 86.96 0.0 13.04 0.0 100.00 0.0	0 326.09	Per Hour 0.00 0.00	Per Service 43.48 6.52 50.00	The pr Item, I selecte The de we hav
	15 - Vat - Standard rated (*	15%)	Per Day C 0	Item Setup Code Description 1001001 VIP Toilet Trailer, Blue Loo, 103 1001002 VIP Toilet Trailer, Blue Loo, 103 1001003 VIP Toilet Trailer, Blue Loo, 103 1001004 VIP Toilet Trailer, Blue Loo, 103 1001005 VIP Toilet Trailer, Blue Loo, 103 1003000 12 Toilet Trailer, Blue Loo, 114 1004001 Single Toilet Trailer, Blue Loo, 20 1004002 Single Toilet Mit, Blue Loo, 20 1004003 Single Toilet Unit, Blue Loo, 20 1004004 Single Toilet Unit, Blue Loo, 20	2 100.00 102 8 100.00 103 4 100.00 104 300.00 111 300.00 112 300.00 113 300.00 114 00.121 120.00 121 120.00 122 1 50.00 201 2 50.00 202 3 50.00 203
			Pla	m Tariff II2 II2 Auto Create Search By Plant Number Search For Description 12 Toilet Traile	Cost Price 340000.00 Rental per day (Excl) 260.87 Tax 33.13 Rental per day (Incl) 300.00

The Financial Tab

In the Financial tab, the Cost Price of the Item is to be entered. If an Item were rented and damaged beyond repair, the Customer can be charged for the replacement thereof. The Cost Price entered here, will be charged in such a case.

The prices as entered on the Item Sub-Category linked to this Item, has successfully been updated to the Item since we have selected the option on the 'Sub-Category's' master file.

The default price to be charged, is selected as 'Per Day', since we have not activated or set up weekly rates in our system.

> Create all other Items in the same manner by entering and selecting the relevant settings.

When done, click 'Close'.



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Equipment Hir



The Item Code is indicated in the colour of the selected Branch, which in this case, is the Mossel Bay Main Branch.

By clicking on the arrow pointing to the right, below the Grid, the Item Descriptions are indicated next to the Item Code.





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👂 ltem Tariff Se	tup						
Code	Description				Price	Incl	
Code		_					
Description				[
Detailed Notes							
Add New	Edit	Delete	Close				

Item Tariffs can also be set up per individual Customer Category, and per Item Category and Sub-Category.

On a Customer's master file, the option can be selected to use the Item Tariff Prices instead of the price set on the Item Sub-Category or Item itself.

From the 'Edit' menu, select 'Item Tariffs', and click 'Add New' in the next screen.



🌒 Add Item Tariff Х Tariff Code 00 Rental Price Day Incl 0.00 o category, Description Rental Price Week Incl 0.00 Customer Category 0 - No category Rental Price Month Incl 0.00 0 - No category Rental Price Hourly Incl 0.00 Item Category - Corporate Customer 2 - Private Customer Hygiene Fee Incl 0.00 Item Sub Category 3 - Government Institution 4 - Sports Institution Detailed Notes Construction Indus Accept Cancel

Add Item Tariff		×
Tariff Code	Rental Price Day Incl	0.00
Description 🔺 Construction Industry, ,	Rental Price Week Incl	0.00
Customer Category 5 - Construction Industry	Rental Price Month Incl	0.00
Item Category	Rental Price Hourly Incl	0.00
Item Sub Category	Hygiene Fee Incl	0.00
Detailed Notes		
	Accept	Cancel

The Code and Description cannot be entered manually, and will consist of the selected Customer Category, Item Category, and Item Sub-Category.

Customer Categories are set up in the Financial system and imported to Novtel. Clicking on the down arrow here, the list of Customer Categories is displayed, and the applicable option can now be selected.

In this case, we are setting up an Item Tariff for the 'Construction Industry' Customer Category.

Immediately, Novtel inserts the Customer Category Code in the 'Code' field, and the Customer Category itself in the 'Description' field.

Item Tariffs



Item Tariffs

🥐 Add Item Tariff					×			
Tariff Code Description	05 Construction Industry			Rental Price Day Incl Rental Price Week Incl	0.00			
Customer Category	5 - Construction Indu	stry	•	Rental Price Month Incl	0.00			
Item Category		Select It	em Category	D 1101 11 11 1	0.00			×
Item Sub Category Detailed Notes		Code 2 3 1	Description Showers Toilet / Shower Toilets	Combo			Acce Cano	

Next, click on the search option in the 'Item Category' field. Search for and select the applicable Item Category from the list.



All 'Item Sub-Categories' linked to the selected 'Item Category' are now displayed, and the applicable option is to be selected.

🌒 Add Item Tariff

The 'Item Tariff's' description now contains the Item Category and Sub-Category too.

Detailed notes can be added here, and the applicable rates entered before clicking 'Accept'.

Tariff Code	0507004	Rental Price Day Incl	40.00
Description	Construction Industry, Toilets, Single Toilet Unit	Rental Price Week Incl	0.00
Customer Category	05 - Construction Industry	Rental Price Month Incl	1000.00
Item Category	7 Q Toilets	Rental Price Hourly Incl	0.00
Item Sub Category	4 Single Toilet Unit	Hygiene Fee Incl	35.00
Detailed Notes			
		Accept	Cancel



0	ltem 1	Tariff Setu	p								
		Code		cription						Price Incl	
		0507004	Con:	struction I	ndustry, To	pilets, S	ingle Toil	et Unit		40.00	
		,									
	Code	.	0507004								
								_			
	Desc	ription	Construc	tion Indus	stry, Toilets	, Single	T				
	Detai	iled						_			
	Note:	s									
	(A	dd New	Ed	lit	Delete		Close	1			

The Item Tariff for a single Toilet Unit, and for the Construction Industry Customer Category, has been created successfully.

Rates for all other Item Categories and Sub-Categories, as well as Customer Categories, can now be created in the same manner. A report listing all created Item Tariffs in the system can be

produced whenever required.



Item Tariffs



Service Agents



Add

Edit

Delete

Service Agents are to be created to link a specific person to the 'servicing' or maintenance of a specific Item or job.

To start the process, click on the 'Edit' menu and select 'Service Agents'.

X

Active

Close

Click 'Add' in the 'Service Agents Setup' screen.

Enter a unique code for this person - We will simply use the initials, 'DR'.

The person's name is entered in the next field, and the service agent is marked as 'Active'. Then, click 'Accept' to save this new service agent.





Service Agent Setup Agent Code Agent Name Active DR Duncan Ross ✓ Add Edit Delete Close

The first 'Service Agent' has now been created successfully, and more individuals can now be created as 'Service Agents' by clicking 'Add' and creating each as explained.

Service Ag	ent Setup	2
Agent Code	Agent Name	Active
DR	Duncan Ross	~
LK	Linda Krause	~
КМ	Kevin Malan	~
JH	James Howard	~
SA	Stephen Anderson	~
Add	Edit Delete	Close

Service Agents

1

Equipment Hir



'Areas' are to be created since it is:

Х

Add

Edit

Delete

Close

- ✓ Linked to a site on the Customer's master file which in turn is linked to a contract
- ✓ Used to plan a route when setting the 'Hygiene Schedule'
- ✓ And a specific Area can be allocated to a Service Agent which may include multiple sites situated in the same Area.

For demonstration purposes, we will now create areas in the greater Mossel Bay and surrounding towns by clicking 'Edit – Areas', and clicking 'Add' in the 'Area Setup' window.

Click in the activated line in the 'Code' field and enter a unique code. Then, click in the 'Description' column and enter the corresponding description for this area before clicking 'Save'.





👂 Area Setup		×
Code	Description	Add
MCBD	Mossel Bay Business District	Edit
		Delete
		Class
		Close

The first area is now created, and the process is repeated until all relevant Areas have been created.

When done, click 'Close'.





Customers

Customer Master Files are created by either clicking on the 'Customers' icon, or from the 'Edit' menu.





Add New Customer		
Account Code External Account Ref		Corporate Customer
Description *	Peterson Dave 🛛 📐	🗖 Order Number Required
Customer Category	00 - No category	Use Item Tariff Prices
Genera	I She Details	Contract Details Use
Postal Addr	Company	ame * Peterson

Add New Customer			
Account Code External Account Ref			Corporate Customer
Description *	Peterson Construction		🔲 Order Number Required
Customer Category	00 - No category	•	🔲 Use Item Tariff Prices
General	Site D	etails C	Contract Details L
Postal Addre	× ×	Company Name Last Name * First Name * Title	Peterson Construction Peterson Dave Mr Initials * D

1. Account Code

An Account Code cannot be entered manually, and Novtel will automatically create the Code when all settings have been captured and the account is saved.

2. Description

The Description field will be populated by Novtel according to the settings entered in the following fields:

- If this Customer's Master File is for a private customer and not a company, the entries made in the 'Last Name' and 'First Name' fields will be entered by Novtel as the 'Description'.
- If a Company Name is entered, this field will be used to populate the 'Description' field.

However: By clicking on the 'Copy To Description' button, the Customer's Last and first names will be set as the 'Description' instead of the Company Name.



Customers

Setup Procedures

3. Customer Category

-

Equipment Hire

Customer Categories are created in the financial system and updated to Novtel. Each Customer can then be linked to a specific Category, relevant to the individual or company.

4. Use Item Tariff Prices

As previously explained: Item Tariffs can be set up per Customer Category, and for specific Item Categories and Sub-Categories.

By ticking the 'Use Item Tariff Prices' checkbox, the Item Tariff price will automatically be used instead of the normal price linked to the Item Sub-Category or Item itself.

5. Corporate Customer

• Unticked

If the 'Corporate Customer' option is unticked, the options are available to set whether or not a deposit will be raised and will be payable by this Customer.

The Customer will not be available for selection when attempting to create an 'Account Contract'.

• Ticked

If the 'Corporate Customer' checkbox is ticked, the 'Deposit' options are hidden, and the Customer will be available for selection when creating an 'Account Contract'.

6. Order Number Required

If an order number is required for a Customer, this option is selected. If not, leave the option unticked.

Add New Customer		
Account Code External Account Ref		6 🗆 Corporate Customer
Description *	Peterson Construction	5 Order Number Required
Customer Category	5 - Construction Industry 3 💌	4 🗹 Use Item Tariff Prices
General	0 - No category 1 - Corporate Customer	Contract Details
Postal Addres	2 - Private Customer 3 - Government Institution 4 - Sports Institution 5 - Construction Industry	e Peterson Construction



7. Billing Interval

The specific option according to which this Customer is to be billed, can be selected as either:

- On the Month End
- On the 25th
- On the 28th
- Or no month end may be applicable since the Customer may be billed by using the daily increment option or weekly billing option.

General	Site Details
8 Postal Address *	98 Construction Street Moss Induxtria Mossel Bay 6500
Physical Address * Copy Postal Address to Physical	98 Construction Street Moss Induxtria Mossel Bay 6500

8. Postal Address vs Physical Address

The Postal address may differ from the physical address, in which case, the fields will be populated with the respective information.

However: If the Postal Address is the same than the Physical Address, only the 'Postal Address' field will be populated, and by clicking on the 'Copy Postal Address to Physical' button, the details will be copied and inserted in the 'Physical Address' field by Novtel.



Account Balance

0.00

Tax Reference

Credit Limit

Payment Terms

9. Tax Reference

The Company's tax referice number is to be inserted here to display on the Tax Invoice issued to the Customer.

10. Credit Limit

By entering a credit limit amount in this field, the Customer will be allowed to only accumulate charges up to this amount. If reached, no further transactions can be performed unless the outstanding amount is settled or significantly reduced.

Novtel Eq	uipment Hire	\times
i	Credit Limit exceeded. Customer must make a payment or apply for additional credit.	
	OK	

Credit Limit 0

123456789 (9)

٩.

Total Due

0.00

Available Credit

20000.00

Notes

* Required Fields

0.00

On Rent Total

20000 10

If no credit limit is applicable, a zero amount is entered.



Tax Reference	123456789			
		🥬 Select Payr	ment Terms	×
Credit Limit		Code	Description	Accept
Payment Terms		1	COD	
r ayment renns		2	30 Days	
	<u> </u>	3	60 Days	Cancel
	Notes	4	90 Days	
* Required Field				
		-		
				1

Company Name	Peterson Construction	
Last Name ×	Peterson	Сору То
First Name ×	Dave	Description
12 Title	Mr 💌 Initials * D	
Date of Birth	1978/10/11 💌 M / F 🛛 💌	
ID Number *	78101101020304 RSA ID 🔽	
False 🔫		

Title	Mr 💌 Initials * D
Date of Birth	1976/12/30 💌 M / F M 💌
ID Number ×	761230 RSA ID 🔽
Valid 🔶	

11. Payment Terms

Specific Payment Terms can be set up in the 'Edit' menu, and the terms applicable to this Customer, can be selected.

12. Personal Details

The title for this Customer can be selected as either 'Mr', 'Ms', or 'Mrs'.

The initials are automatically derived from the 'First Name' field as entered by the system User.

The date of birth is to be entered and the Customer's sex can be selected as either male or female.

By ticking the 'RSA ID' field and entering an ID number, Novtel will check whether the ID number is valid. If not, Novtel will indicate in red that the ID number is false.

If the ID number is valid, Novtel will indicate the wording in green.



Fields	Private Custom	er)				
Telephone No Fax N Mobile Phone AH Telephon Email Addres Search Numb	* 044 693 123456 0 082 123456789 0 082 123456789 0 peterson@construct.c	- 1 3		All o	ther c	details	
Block Customer /	Account						
I New Customer Account Code ternal Account Ref Description * Peter	son Construction				Billing Interval	On Month E	Ind
Customer Category 5 - Co	onstruction Industry	•					
Physical Address * [Aoss Induxtria Aossel Bay 500 18 Construction Street	Company Name Last Name * First Name * Title Date of Birth ID Number * False	Peterson Construction Peterson Dave Mr v Initials * D 1976/12/30 v M / F	M T	Copy To Description A I Se	npany Reg No lephone No * Fax No obile Phone * AH Telephone Email Address aarch Number	04 08 pe
	Company Reg N Telephone No Fax N Mobile Phone AH Telephon Email Addres Search Numb Contact Person Block Customer / New Customer Account Ref Description * Peter Customer Category 5-Cc General Postal Address * 5 F	Company Reg No 123ABC456DEF Telephone No 044 693 123456 Fax No	Company Reg No 123ABC456DEF Telephone No 044 693 123456 Fax No 13 Mobile Phone 082 123456789 AH Telephone Email Address Email Address peterson@construct.com Search Number Contact Person * Contact Person * Dave Peterson Block Customer Account Image: Construction for the second s	Company Reg No 123ABC456DEF Telephone No 044 693 123456 Fax No 082 123456789 AH Telephone 082 123456789 AH Telephone 082 123456789 AH Telephone 082 123456789 Search Number Contact Person * Contact Person * Dave Peterson Block Customer Account Image: Contact Person * New Customer Image: Contact Details Contact Ref Image: Contact Details Description * Peterson Construction Contract Details Image: Contract Details Postal Address * 88 Construction Street Mossi Industria Date of Birth Mossi Industria Date of Birth Physical Address * 88 Construction Street Mossi Industria Date of Birth ID Number * 1976/12/20 m M / F Physical Address * 88 Construction Street Moss Industria Date of Birth ID Number * 1976/12/20 m M / F	Company Reg No 123ABC456DEF Telephone No × Mobile Phone × Dave Peterson@construct.com All o Search Number Dave Peterson Contact Person × Dave Peterson ✓ Block Customer Account ✓ New Customer ✓ Latomer Calegoy 5 - Construction Very Customer ✓ Very Customer ✓ Contract Details ✓ Very Customer ✓ <td< th=""><th>Company Reg No Telephone No * 044 693 123456 Fax No Mobile Phone * 082 123456789 AH Telephone Email Address peterson@construct.com Search Number Contact Person * Dave Peterson Block Customer Account Block Customer Account Email Address * Bit Construction Industry New Customer Peterson Construction Industry Peterson Industry Peterson Construction Industry Peterson C</th><th>Company Reg No Telephone No * D44 693 123456 Fax No Mobile Phone * D82 123456789 AH Telephone Email Address peterson@construct.com Search Number Contact Person * Dave Peterson Block Customer Account Block Customer Account Here Customer Account Block Customer Account Peterson Construction Customer Category 5: Construction Industry Peterson Construction Industry Peterson Construction Industry Peterson Construction Company Name Peterson Construction Company Reg No 133. Other Details All other details populated - are the Bling Interval On Monthe Company Reg No Company Reg No Note Peterson Peterson Construction Company Reg No Note Peterson Company Reg No Note Peterson Company Reg No Note Peterson Company Reg No Note Peterson Company Name Peterson Construction Company Name Peterson Construction Company Name Peterson Construction Company Name Peterson Construction Company Reg No Note Prove Note Prove Search Number Company Reg No Note Prove Note Prove Note Prove Note Prove Note Prove Note Prove Search Number Peterson Note Prove Note Pro</th></td<>	Company Reg No Telephone No * 044 693 123456 Fax No Mobile Phone * 082 123456789 AH Telephone Email Address peterson@construct.com Search Number Contact Person * Dave Peterson Block Customer Account Block Customer Account Email Address * Bit Construction Industry New Customer Peterson Construction Industry Peterson Industry Peterson Construction Industry Peterson C	Company Reg No Telephone No * D44 693 123456 Fax No Mobile Phone * D82 123456789 AH Telephone Email Address peterson@construct.com Search Number Contact Person * Dave Peterson Block Customer Account Block Customer Account Here Customer Account Block Customer Account Peterson Construction Customer Category 5: Construction Industry Peterson Construction Industry Peterson Construction Industry Peterson Construction Company Name Peterson Construction Company Reg No 133. Other Details All other details populated - are the Bling Interval On Monthe Company Reg No Company Reg No Note Peterson Peterson Construction Company Reg No Note Peterson Company Reg No Note Peterson Company Reg No Note Peterson Company Reg No Note Peterson Company Name Peterson Construction Company Name Peterson Construction Company Name Peterson Construction Company Name Peterson Construction Company Reg No Note Prove Note Prove Search Number Company Reg No Note Prove Note Prove Note Prove Note Prove Note Prove Note Prove Search Number Peterson Note Prove Note Pro

0

0.00

٩ Notes

Required Fields

Account Balance On Rent Total Total Due Available Credit

0.00

Tax Reference 123456789

Credit Limit

Payment Terms

0.00

Customers

Details

her details – of which some are mandatory fields to be ated - are to be entered.

• 0

Private Customer

044 693 123456

082 12345678

peterson@construct.com

Accept

Cancel

Company Reg No 123ABC456DEF

Contact Person * Dave Peterson

Block Customer Account

Start Camera

Pastel Customer Statement

Provisional Customer Statement

Note that the Account Code has not yet been created at present.

For demonstration purposes, we will now first save this Customer Account by clicking 'Accept'.



Customers

🥬 Customers									×
Description	Number	ID Number	Telephone	Mobile Phone	External Ref	Physical Address	Postal Addess	Email I	Refresh <f5></f5>
Peterson Construction 🙋	PE0001	761230010203	044 693 12345	082 12345678		98 Construction Stree	98 Construction Stree	peterson@construct.) F	
									Add New <f6></f6>
									Edit
Search									1
C Number	C Descript	ion C II) Number	C Telep	hone #	C Mobile Phone #	Peters	on 🚺	
C External Ref	C Physical	Address C P	'ostal Address	C Email	Address				Cancel

To search for a specific Customer:

- 1. Enter the required account description can here, and click the 'Description' option.
- 2. When matched by Novtel, the account will be displayed at the top of the list.

To access the account, click on it, and select the 'Edit' button.

ACCOUNTCUST	OMER	
Account Code	PE0001	🔽 Corporate Customer
External Account Ref		
Description *	Peterson Construction	🔲 Order Number Required
Customer Category	5 - Construction Industry	🔽 Use Item Tariff Prices

The Account Code has been created and is inserted by Novtel automatically because of the 'Corporate Customer' classification.

This Customer is also classified as an 'Account Customer' at the top of the window.



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Equipment Hire

CCOUNTCUST	O M E R											
Account Code	PE0001			🔽 Co	rporate Cus	stomer	Billing Inter	rval On Me	onth End	• 0		
External Account Ref												
Description *	Peterson Construction			Or	der Number	r Required						-
Customer Category	5 - Construction Industry			🕶 🔽 Us	e Item Tarif	ff Prices						
General		Site Details		Contract Deta	nils	γ	User Defined	l Fields	Privat	e Customer		
ID Site	•		Contact	Mobile	Site #							
PE0001/001 98	Construction Street		1	082 12345678	001							
												ĉ
												١
												C
Add	Edit Delete	1										
	ACCOUNTCUS	TOMER										
		DE 0001	-				H 0 1	- ·				
Account Balance Or	Account Code						Corporate	Lustomer	Billing Interval	On Month End	±	• 0
0.00	_	-	da se d'a se			_						
	Description					_	Crder Num					
	Customer Category					_	Use Item 1	ariff Prices				
	Gene	ral	Site	Details		Contra	ct Details		User Defined Field	ls	Private Cu	istomer
	Volume	Con	tract Start Date	End Date	. (Status	Site Descrip	tion				
				Endbac	- I	ordido	oko b otonp					
	Edit / View	C All Contracts	ເ⊂ On Re	nt Contracts	C Out	standing Iter	ns C	Outstanding C	Contract Balances			
	Click on C	olumn Header to	o sort. Click on I	ine to select Tr	ansaction	1.						
	Account Balance			Available Credit		Provis	ional Customer	Statement	Pastel Custome	er Statement	Accept	Cancel
	0.00	0.00	0.00	0.00	U							

The Site Details Tab

At present, the Customer's Physical Address has been inserted here as the first 'Site'.

We will create more 'Sites' for this Customer when contracts are created for Items to be rented and to be placed at different sites.

The Contract Details Tab

Proceeding to the 'Contract Details' tab, no contracts are displayed at present, since we have not created any contracts for this Customer yet.



ACCOUNTCUST	OMER																						
Account Code	PE0001	_			ſ	✓ Corpo	rate Cu:	tomer	Γ	Billing I	nterval	0.	Month	End		_	0						
External Account Ref					,	conpo				Dimrigi	ritervar	Jun	Month	Ena		<u> </u>	10						
Description *	Peterson Con	struction				Order	Number	Requir	ed												r L	_	
Customer Category	5 · Construction	on Industry			• I	🗸 Use It	em Taril	f Prices													٢h	e	U
General		Site Deta	ils	Ŷ	Contrac	t Details			Us	er Defi	ined Fi	elds			Privat	e Custo	mer						
																					λny νοι		
		User Defined Field 1																		r	es	pe	ct
		User Defined Field 2				_																1	
		User Defined Field 3				_															. .		
		User Defined Field 4				_														F	le	as	e i
	L	User Defined Field 5																					
																					inc		
		Novtel Ablution File Edit N																					
					Less Repu		n Nole	A					h /										
Account Balance 0	n Rent Total		<u> </u>	୭`	<u>→ • [</u>			6	A	1				2									
0.00	0.00	-	21 22 Sep Sep 2022 2022	23 Sep	24 25 Sep Sep 2022 2022	26 Sep 2022	27 Sep 2022	28 Sep 2022	29 Sep 2022	30 Sep 2022	01 Oct	02 Oct	03 Oct	04 Oct	05 Oct	06 Oct	07 Oct	08 Oct 2022	09 Oct 2022	10 Oct	11 Oct	12 Oct	13 Oct
		01001001 🔍	2022 2022 Wed Thu	2022 Fri	2022 2022 Sat Sun	2022 Man	2022 Tue	2022 Wed	2022 Thu	2022 Fri	2022 Sat	2022 Sun	2022 Mon	2022 Tue	2022 Wed	2022 Thu	2022 Fri	2022 Sat	2022 Sun	2022 Mon	2022 Tue	2022 Wed	2022 Thu
		01001001																					
		01001002																					
		01001003																					
		01001004																					
		01002001																					
		01002002																					
		01003001																					
		01003002																					
		01003003																					
		01003004																					
		01004001																					
		01004002																					
		01004003					<u> </u>																
		01004004					<u> </u>																
		02001001																					
			•																				
		View Items by Code Plant No Transfer	On Rent	,					Jser De	fobile P Telep fined Fi	Fax hone ield 1							eposit P Invo Rece	t Balanc Paid Tota bice Tota eipt Tota	al al al			
		2022/09/21 💌	2022/10/25						Jser De	fined Fi fined Fi	eld 3								osit Forfe it Refun				
									Jser De	fined Fi	ield 5								Balanc				
								_		_	_			_		_			_		_	_	

The User Defined Fields Tab

ny additional information – not covered by the system – and which our company wishes to capture, can be added in these 5 fields, espectively.

lease note that Custom captions can be created from the 'Setup' menu, nd the captions will be displayed here.

The information entered for this Customer will also be displayed at the bottom of the Grid when hovering on a contract created for this Customer.



ACCOUNTCUST	OMER												
Account Code	PE0001	1		Corp	orate Customer	Billing Interval On Month En	End 💌 🛛						
External Account Ref				-									
Description *	Peterson Cons			Order Number Required									
Customer Category	5 - Constructio	n Industry	•	🔽 Usel	tem Tariff Prices								
Genera		Site Details		Contract Details	Ý	User Defined Fields	Private Cu	stomer					
	ID	ID Number		Lastname	Firstname	Title							
		761230010203		Peterson	Dave	Mr							
	Add	Edit Delete					1						
Account Balance 0	n Rent Total	Total Due Available Credit		Provisional Cust	omer Statement	Pastel Customer Statement	Accept	Cancel					

The Private Customer Tab

The last tab contains the default information for this Customer – as entered in the 'General' tab.

Clicking on the line and clicking 'Edit', more information can be added for this person in the 7 available tabs:

🌔 Edit Person	×
Code: Last Name	001 Peterson Default Contact
First Name Customer Code:	Dave PE0001 Peterson Construction
General	Photo Spouse Employment Dependants References Access Tags
	Mr D 1976/12/30
Gender Marital Status	
	Accept Cancel



Customers

ACCOUNTCUST	OMER								
Account Code	PE0001			🔽 Corpor	rate Customer	Billing Interval	On Month Er	nd	• 0
External Account Ref Description *	Peterson Constru	ation		E o t i					
Customer Category	5 - Construction I		•		Number Required em Tariff Prices				
	· · · · · · · · · · · · · · · · · · ·	-			em Lariff Prices				
General		Site Details		Contract Details		User Defined Fields		Private Cu	stomer
	ID	ID Number		Lastname	Firstname	Title			
		761230010203		Peterson	Dave	Mr			
	Add	Edit Delete	,						
Account Balance Or 0.00	n Rent Total 0.00	Total Due Available Credit		Provisional Custo	mer Statement	Pastel Customer	Statement	Accept	Cancel

Also note that more persons – like Employees of this company for example - can be created here by clicking 'Add', capturing the details and saving the files.

When done, click 'Accept' to save all changes made to this Customer Master File.



Customer Email Setup and Management

Emails containing a Customer's attached invoices and statement for the selected month, as well as up to 10 additional attachments, can be sent from Novtel via your email program, to:

- ✓ Either a single Customer ONLY
- ✓ A selected range of Customers
- ✓ Or ALL Customers simultaneously

The 'Hygiene Doc Number Report' can also be attached for Customers in the 'Hygiene' industry and using the 'Ablution Hire' part of the system.

ACCOUNTCUST	DMER			
Account Code	PE0001	🔽 Corporate Cus	omer Billing Interval On Month	End 💌 🛛
Description *	Peterson Construction	Order Number	Permined	
Customer Category	5 - Construction Industry	▼ Use Item Tarif		
General	· · ·	Contract Details	User Defined Fields	Private Customer
Postal Addre Physical Addre Copy Postal Address to Physical Tax Referen Credit L	Moss Induxtia Mossel Bay 6500	Company Name Last Name * Peterson First Name * Dave Title Mr initials * Date of Birth ID Number * 761230010203 False	Copy To Description F M V RSA ID V RSA ID V	082 12345678 e s g <t< td=""></t<>
Payment Te	Motes Notes Required Fields		Start Camera	
Account Balance On	Rent Total Total Due Available C	Credit Provisional Customer Sta	ement Pastel Customer Statement	Accept Cancel

Very Important:

Always ensure that the correct email address for all Customers have been inserted on the respective Customer Master Files, as this email address will be used by Novtel automatically and entered on the email to the Customer.

\triangleright	From 🗸	Louise@novtel.com
Send	То	peterson@construct.com
	Cc	
	Bcc	



Customer Email Setup and Management

By clicking on the 'Email' icon, the following disclaimer is displayed. After reading it carefully, proceed to click 'OK'.





The application installation screen will be launched and the 'Install' button is clicked to install this application.

• Please note that the installation is a once off process since the application will launch automatically in the future after clicking 'OK' in the disclaimer window.



lessage Options		Attachment Options	
Send Operation:		Attachment 1:	٩
 Save Only To Drafts Send Directly 		Attachment 2:	٩
		Attachment 3:	٩
Global Subject:	Report Type Selection		٩
	Date Selection		٩
Global Message:	From: October ~	To: October ~	
(Maximum of 255 Characters)	2022 ~	2022 ~	٩
	Customer Selection		٩
	From Customer: PE0001	Peterson Construction	٩
	To Customer: PE0001		٩
			٩
Documents to include:		thments	
 Statement Only 		Accept Cancel	
 Invoices Only Statement and Invoices 	Include Hygiene Doc Number Reporting	Invoice Layout:	\sim
		Export Path:	٩
Generate Report After Sending		(Leave blank to use default export path)	
		(Deave blank to use default export path)	

After installing the Email Application, the 'Setup Email', and 'Report Type Selection' windows are opened.

A specific date and customer range can be selected. In this case October 2022, and ONLY for a specific Customer, namely 'Peterson Construction'.

However: All Customers with active contracts can be emailed simultaneously by selecting the first Customer in the 'From' field, and the last Customer in the 'To' field.

The 'Accept' button is now clicked.



Setup Email
Message Options
Send Operation:
① Save Only To Drafts
2 O Send Directly
-

Customer Email Setup and Management

Message Options

Send Operation

The system User will select whether to save the emails to the Drafts folder or sending it directly to the selected Customers.

1. Save Only to Drafts

Selecting this option, the emails to all selected Customers will be saved in the email 'Drafts' folder. In doing so, custom messages and / or documents per Customer can be added before sending the email.

2. Send Directly

Selecting this option, the emails and all attachments added will be sent to the selected Customers directly – without the possibility of being saved to the Drafts folder first.



📢 Setup Email

Message O

ıp Email	
essage Options	Global Subject
Send Operation:	The 'Global Subie

Save Only To Drafts

O Send Directly

Global Subject:	
Hygiene Experts - Invoice and Statement	

bject' entered in this field, will be indicated e Global in the Email Subject's field for ALL selected Customers.

On the email, the 'Subject' is displayed accordingly:

All Unread By Date ∽ ↑		
peterson@construct 0 🖗 Hygiene Experts - Invoice a None	From ·	✓ Louise@novtel.com
Dear Customer Thank you	Send To	peterson@construct.com
	Cc	
	Всс	
	Subjec	t Hygiene Experts - Invoice and Statement

Customer Email Setup and Management



Customer Email Setup and Management

📢 Setup Email	
Message Options Send Operation:	Global I The Glo
 Save Only To Drafts Send Directly 	here an
Global Subject:	On the
Hygiene Experts - Invoice and Statement Global Message: Dear Customer Thank you for your continued support. Please find attached your Invoice and Statement. Kind Regards. The Hygiene Experts Team	Send
	Dear Custor
	Thank you f Please find

Global Message

The Global Message for ALL selected Customers can be entered here and cannot exceed a maximum of 255 characters.

On the email, the message will be displayed as follows:

\triangleright	From V	Louise@novtel.com	
Send	То	peterson@construct.com	
	Cc		
	Bcc		
	Subject	Hygiene Experts - Invoice and Statement	
PDF 8 KB	ce_2	► HygieneDocNumberRe 8 KB	porting_PE0002
Dear Custome	٤r		
Thank you for Please find at		ed support. voice and Statement.	
Kind Regards. The Hygiene E			



Documents to include:					
Statement Only					
Invoices Only	Include Hygiene Doc Number Reporting				
Statement and Invoices					

\triangleright	From 🗸	Louise@novtel.com			
Send	То	peterson@construct.com			
	Cc				
	Bcc				
	Subject	Hygiene Experts - Invoice and Statement			
	nvoice_2 3 KB	✓ HygieneDocNumberReporting_PE0002 8 KB			
Dear Cust	comer				
Thank you for your continued support. Please find attached your Invoice and Statement.					
Kind Rega The Hygie	ards. ene Experts Team				

Documents To Include

In this field, the User can select one of the following options for documents to be included in the email:

- ✓ Statement Only
- ✓ Invoices Only
- ✓ Statement and Invoices

Also note that by ticking the option to 'Include Hygiene Doc Number Reporting', this report will also be attached and sent to the respective Customers.

As per or example, the 'Invoices Only' option is selected as well as the 'Include Hygiene Doc Number Reporting' option. Therefore, the selected documents for the month will be added per Customer email, respectively.





Customer Email Setup and Management

Generate Report After Sending

By selecting this option, a report will be generated after sending the emails, and will be displayed as follows:

Attachments	Status	Email	
Invoice_2	Successful	peterson@construct.com	
Hygiene Doc Number Report	Successful	peterson@construct.com	
	Invoice_2 Hygiene Doc Number	Invoice_2 Successful Hygiene Doc Number Successful	Invoice_2 Successful peterson@construct.com Hygiene Doc Number Successful peterson@construct.com



Attachment Options

Up to 10 attachments can be added here – which will also be sent to the selected Customers in addition to the statements and / or invoices.

These attachments will be applicable to all Customers.

Invoice Layout and Export Path

One of the following Invoice Layout options can be selected:

- ✓ Plain Paper
- ✓ Logo Left
- ✓ Logo Right

A specific 'Export Path' can be selected to which the emailed documents are to be exported – if required.

Message Options	Attachment Options
Send Operation:	Attachment 1:
Save Only To Drafts	
Send Directly	Attachment 2:
	Attachment 3:
Global Subject: Hygiene Experts - Invoice and Statement	Attachment 4:
Global Message:	Attachment 5:
Dear Customer	Attachment 6:
Thank you for your continued support. Please find attached your Invoice and Statement.	Attachment 7:
Kind Regards. The Hygiene Experts Team	Attachment 8:
	Attachment 9:
	Attachment 10:
]	
	Reset All Attachments
Documents to include:	
O Statement Only	
O Invoices Only	Invoice Layout: Logo Left ~
Statement and Invoices	
	Export Path: C:\Users\User\Desktop\Document Exports
Generate Report After Sending	(Leave blank to use default export path)



Customer Email Setup and Management

Setup Email				×				
Message Options		Attachment Options						
Send Operation:		Attachment 1:			Clicking 'Accept', the email(s) are either sent directly to the Customer(s) or saved to the			
 Save Only To Drafts Send Directly 		Attachment 2:						
		Attachment 3:						
Global Subject:					email 'Drafts' folder, and this report is generated if the option was selected to do so.			
Hygiene Experts - Invoice and Statement								
Global Message:		Attachment 5:	Q.					
Dear Customer		Attachment 6:	Q					
Thank you for your continued support. Please find attached your Invoice and Statement.	Thank you for your continued support. Please find attached your Invoice and Statement.		Q	Generated Report After Sending				
Kind Regards. The Hygiene Experts Team								
	All Relative Documentation has bee any errors occured, a failurelist will		<u> </u>	Customer	Attachments	Status	Email	
			٩	PE0002	Invoice_2	Successful	peterson@construct.com	
		ОК		PE0002	Hygiene Doc Number Report	Successful	peterson@construct.com	
Demonstration		Reset	Attachments					
Documents to include: O Statement Only								
 ○ Invoices Only ✓ Include ④ Statement and Invoices 	Hygiene Doc Number Reporting	Invoice Layout: Logo Left	~					
		Export Path: C:\Users\User\Desktop	\Document Exports					
Generate Report After Sending		(Leave bla	nk to use default export path)					
			Accept Close					



Customer Email Setup and Management

After sending the emails, the documents will be exported to the selected folder as follow:







Viewing the 'Drafts' folder, the email is displayed as follows, and can now be edited if applicable, and sent to the Customer.



Customer Email Setup and Management

Default Email Settings

Please note that the next time the Email Icon is selected; The disclaimer screen closed, and the date and customer range selected, the settings as entered previously will be displayed by default.

The settings can be altered if needed, and the attachments reset if different documents are to be attached in addition to the Invoices, statements and – if applicable – the Hygiene Document Number report.

lessage Options	Attachment Options
Send Operation:	Attachment 1:
Save Only To Drafts Send Directly	Attachment 2:
	Attachment 3:
Global Subject: Hygiene Experts - Invoice and Statement	Attachment 4:
. Allance mitiane and ensembles	Attachment 5:
Global Message: Dear Customer	Attachment 6:
Thank you for your continued support.	Attachment 7:
Please find attached your Invoice and Statement. Kind Regards.	Attachment 8:
The Hygiene Experts Team	Attachment 9:
	Attachment 10:
Documents to include:	Reset All Attachments
O Statement Only	
Invoices Only Include Hygiene Doc Number Reporting Statement and Invoices	Invoice Layout: Logo Left ~
	Export Path: C:\Users\User\Desktop\Document Exports
Generate Report After Sending	(Leave blank to use default export path)
	Accept Close

