



Novtel[®] Ablution Hire



Restrooms



The Basics of Novtel Ablution Hire

INDEX

1. Introduction

2. Creating Contracts

- Adding a Site
- Creating a Contract per Site
- Raising a Deposit on a Contract

3. Accessing a Contract

4. Processing a Deposit Payment

5. On Rent Items

6. The Daily Increment Procedure

7. Hygiene Scheduling and Re-Scheduling

8. Hygiene Service Management

9. The Hygiene Route Sheet

10. Manually Adding Non-Rental Charges to a Contract

11. Returning and Invoicing an Item

12. Account Payments

13. Reports

14. Setup Procedures

- Users and Passwords
- Company Setup
- Company POS Setup
- Document Notes Setup
- Branches Setup
- Charges Setup
- Hygiene Consumables
- Item Categories and Sub-Categories
- Creating Items
- Item Tariffs
- Service Agents
- Creating Areas
- Customers
- Customer Email Setup and Management



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1

Introduction



Restrooms





Introduction

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

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

- ✓ 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.



Introduction

□ 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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2

Creating Contracts

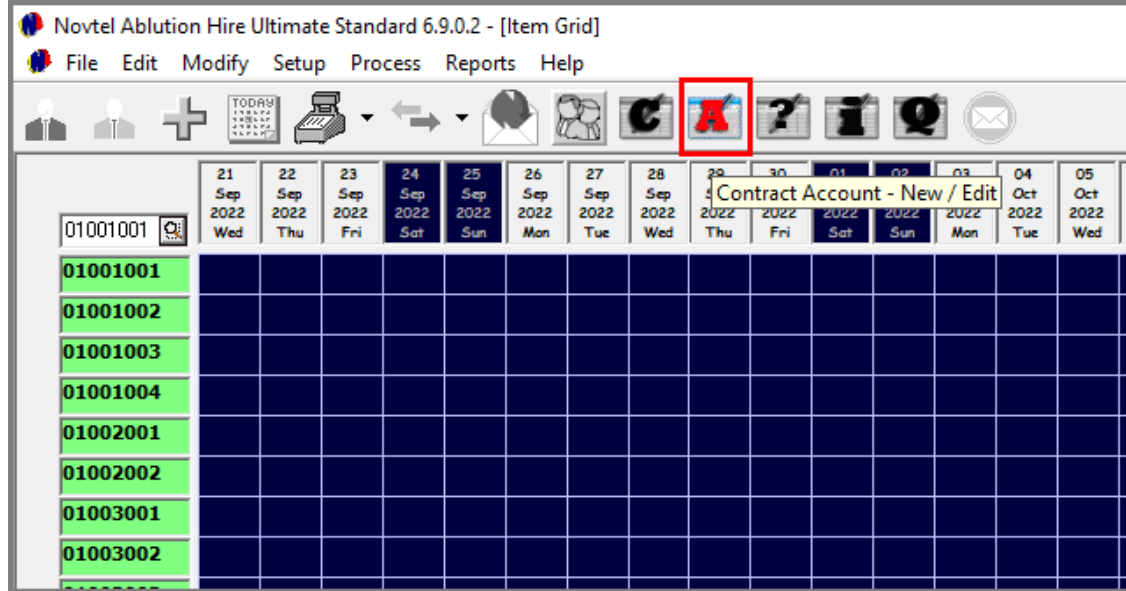


Restrooms



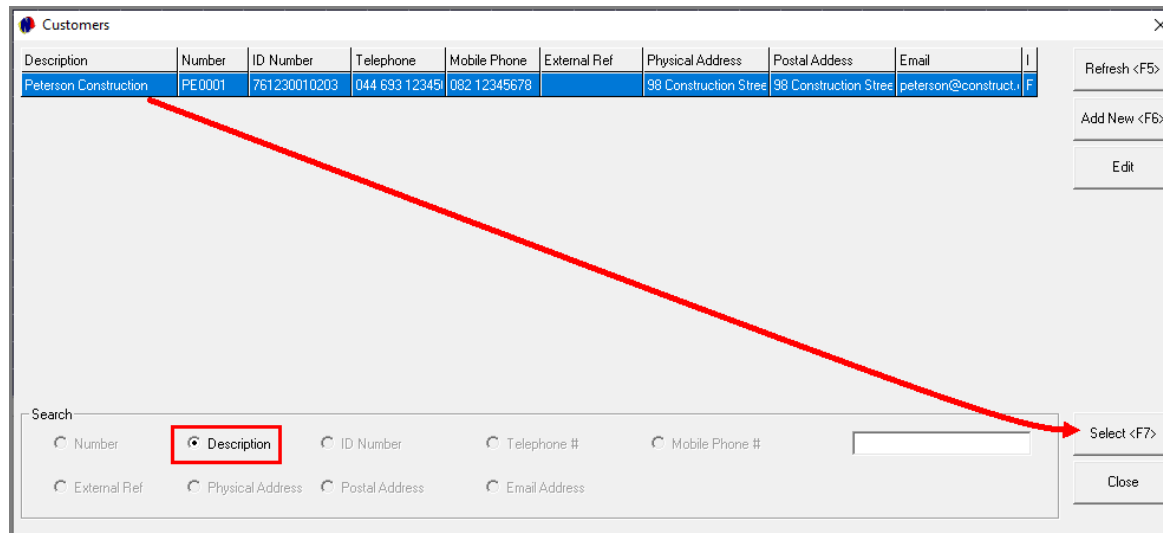


Creating Contracts



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.



ACCOUNT CUSTOMER

Account Code: PE0002

External Account Ref: [Empty]

Description: * Peterson Construction

Customer Category: 5 - Construction Industry

Corporate Customer: Billing Interval: On Month End 0

Private Customer:

Site Code: [Empty] Service Sequence: 0

Customer Code: PE0002 Peterson Construction

Area Code: [Empty]

Site Number/ Code: [Empty]

Site Description: [Empty]

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

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

Contact Person: [Empty]

Telephone: [Empty]

Mobile Phone: [Empty]

Fax Number: [Empty]

Email Address: [Empty]

Delivery Address: [Empty]

Buttons: Add 1, Edit, Delete, Accept, Cancel

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

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.

Available areas

Search By: Code

Search For: [Empty]

Code	Description
DZBH	Diaz Beach
HERD	Heiderand
HNBS	Hartenbos
MBGE	Mossel Bay Golf Estate
MCBD	Mossel Bay Business District
MECO	Monte Cristo
VRBY	Voorbaai

Buttons: Add New Area, Accept, Cancel

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'.



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.

The screenshot shows a software dialog box titled "Add Delivery Address" with a close button (X) in the top right corner. The dialog contains several input fields and labels, with red circles and numbers 5 through 9 highlighting specific areas:

- 5** highlights the "Site Number/ Code" field, which is currently empty.
- 6** highlights the "Site Description" field, which contains the text "Apartment Construction".
- 7** highlights the "GPS (N/S)" and "GPS (E/W)" fields, both containing "-000.000000".
- 8** highlights the "Contact Person" field, which contains "Grant".
- 9** highlights the "Delivery Address" field, which contains "West Street", "Mossel Bay Golf Estate", "Mossel Bay", and "6500".

Other visible fields include:

- "Service Sequence" with value "0".
- "Customer Code" with value "PE0002" and a dropdown menu showing "Peterson Construction".
- "Area Code" with value "MCBD" and a dropdown menu showing "Mossel Bay Business District".
- "Format As" fields for both GPS coordinates, both showing "-031.123564".
- "Telephone" and "Fax Number" fields are empty.
- "Mobile Phone" field contains "082 123654".
- "Email Address" field contains "grant@pconstruct.com".

At the bottom of the dialog, there are two buttons: "Accept" (with a green checkmark icon) and "Cancel".



Creating Contracts

Adding a Site

ACCOUNT CUSTOMER

Account Code: PE0002 Corporate Customer Billing Interval: On Month End 0

External Account Ref:

Description *: Peterson Construction Order Number

Customer Category: 5 - Construction Industry Use Item Tariff

General		Site Details	Contract Details	
ID	Site	Contact	Mobile	Site #
PE0002/001	Apartment Construction	Grant	082 123654	001

Buttons: Add Edit Delete New Contract

Edit Delivery Address

Site Code: PE0002/001 Service Sequence: 0

Customer Code: PE0002 Peterson Construction

Area Code: MCB0 Mossel Bay Business District

Site Number/ Code: 001

Site Description: Apartment Construction

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

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

Contact Person: Grant

Telephone:

Mobile Phone: 082 123654

Fax Number:

Email Address: grant@pconstruct.com

Delivery Address: West Street, Mossel Bay Golf Estate, Mossel Bay, 6500

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.

ACCOUNT CUSTOMER

Account Code: PE0002 Corporate Customer

External Account Ref:

Description *: Peterson Construction Order Number Required

Customer Category: 5 - Construction Industry Use Item Tariff Prices

General		Site Details	Contract Details	
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	Quinton	083 214587	005

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.



Creating Contracts

Creating a Contract per Site

ACCOUNT CUSTOMER

Account Code: PE0002 Corporate Customer Billing Interval: On Month End 0

External Account Ref:

Description: Peterson Construction Order Number Required

Customer Category: 5 - Construction Industry Use Item Tariff Prices

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	Quinton	083 214587	005

Add Edit Delete **New Contract**

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

Provisional Customer Statement Pastel Customer Statement Accept Cancel

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

Customer Code: PE0002 Peterson Construction **1** **Construction Industry**

Site Number: PE0002/001 Apartment Construction **2**

Branch: Mossel Bay, Main Branch **3**

Contract Number:

Last Increment Date: 2022/10/11

Monthly Recovery Contract



The General Tab

In this tab the following details are found:

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.



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.

The screenshot shows a form with the following fields and callouts:

- Order Number :** Callout 4 points to an empty text input field.
- Contract Status :** Callout 5 points to a dropdown menu currently showing 'Provisional'.
- Container Number :** Callout 6 points to a text input field containing '0'.
- Discount % :** A text input field containing '0' with a 'Fixed' label to its right.
- Agent Code :** A text input field with a search icon to its right.
- Description :** A text input field.



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'.

Contract Details

Contract Volume #: 2 2022/10/11 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 Branch Monthly Recovery Contract

General **Hire Item** Non-Serial Non-Rentals Deposits Payment Detail View Financial Kit Group/Quote

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hou	
2	ZGR00	Deposit - 0.00		0.00	0.00	N	Provisio...	Deliver		0	0	0	0.00	0	0	0.00	1.00	0.00	0

Display <F1> Add New <F3> ✓ Remove <F4> Hire Item Select All <F5> Select None <F6> Move Contract <F7> <HC>

On Rent <F8> Deliver/Collect <F9> Return <F10> Apply Selection <F2> Rain Day/Off Hire <F11> Amend Contract Cancel Item

Reports to: Screen Print POS Print to: Screen Print

Save Cancel Refund Charge Contract Summary Delivery Note Return Note Close

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'.

Available Items

Search

Search By: Code

Search For:

Code	Plant No	Serial No	Description	Maintenance Due	Be
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	

Accept Cancel



Creating Contracts

Creating a Contract per Site

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 Branch **Monthly Recovery Contract**

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	DHD	S	P	HDA	HD	Rate PH	Hou
2	ZGR00...	Deposit - 0.00		0.00	0.00	N	Provisio...	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	0.0
3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	0.00	N	Provisio...	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0

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

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 Branch **Monthly Recovery Contract**

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	DHD	S	P	HDA	HD	Rate PH	Hou
2	ZGR00...	Deposit - 0.00		0.00	0.00	N	Provisio...	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	0.0
3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	0.00	N	Provisio...	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
4	01004001	Single Toilet Unit, Blue Lo...	0501004	40.00	0.00	N	Provisio...	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
5	01004002	Single Toilet Unit, Blue Lo...	0501004	40.00	0.00	N	Provisio...	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	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 Branch		Monthly Recovery Contract	<input type="checkbox"/>

General | Hire Item | Non-Serial | Non-Rentals | **Deposits** | Payment | Detail View | Financial | Kit Group/Quote

1.) Deposit Raised Shift #: SFT00002 User : Danny

Deposit Amount : 500

2.) Deposit Paid 1700.00 <<< Suggested Deposit



Creating Contracts

Raising a Deposit

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 Branch Monthly Recovery Contract

General Hire Item Non-Serial Non-Rentals **Deposits** Payment Detail View Financial Kit Group/Quote

1.) Deposit Raised 2022/10/11 Shift #: SFT00002 User: Danny

Deposit Amount: 500.00 Deposit Due: 2022/10/11 Pay Deposit

2.) Deposit Paid 1700.00 <<< Suggested Deposit

3.) Deposit Applied

3.) Dep Fully Refunded

Reports to: Screen Print POS Print to: Screen Print

Save Cancel Refund Charge Contract Summary Delivery Note 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.

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

Item No	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23
	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun
01001001								3												
01001002																				
01001003																				
01001004																				
01002001																				
01002002																				
01003001																				
01003002																				
01003003																				
01003004																				
01004001								4												
01004002								5												
01004003																				
01004004																				
02001001																				

View Items by: Code Available On Rent Plant No On Rent Transfer Maintenance

Contract 2 Vol 2 Mobile Phone: 082 12345678 Credit Note: 0.00

2022/10/04 2022/10/23 80 Construction Street Fax: Contract Dep Paid: 0.00

Mossel Bay Telephone: 044 693 123456 Contract Invoice Total: 0.00

peterson@construct.com User Defined Field 1 Contract Dep Forfeit: 0.00

peterson@construct.com User Defined Field 2 Contract Dep Refund: 0.00

peterson@construct.com User Defined Field 3 Contract Balance: 0.00

peterson@construct.com User Defined Field 4 Contract Receipt Total: 0.00

peterson@construct.com User Defined Field 5 Contract Dep Refund: 0.00

Cancelled Provisional Confirmed On Rent Returned Fully Paid Non Rev

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.



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3

Accessing a Contract



Restrooms





Accessing a Contract

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.

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

04 Oct 2022 Tue 05 Oct 2022 Wed 06 Oct 2022 Thu 07 Oct 2022 Fri 08 Oct 2022 Sat 09 Oct 2022 Sun 10 Oct 2022 Mon 11 Oct 2022 Tue 12 Oct 2022 Wed 13 Oct 2022 Thu 14 Oct 2022 Fri 15 Oct 2022 Sat 16 Oct 2022 Sun 17 Oct 2022 Mon 18 Oct 2022 Tue 19 Oct 2022 Wed 20 Oct 2022 Thu

01001001

Select Contract

Volume	Contract	End Date	Description	Customer Code	Customer Description	Start Date	Status
1	0000001	2022/10/11	20221011	PE002	Peterson Construction	2022/10/11	Provisional
2	0000001	2019/07/11	20190711	CU001	Customer Cash	2019/07/11	Provisional

View Items by: Code Available Plant No On Rent Transfer Maintenance

Search By: Volume Search For: Contract Status: All Contracts On Rent Returned (Incomplete) Provisional / Confirmed Returned (Fully Paid)

Edit Contract

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.

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

10 Oct 2022 Mon 11 Oct 2022 Tue 12 Oct 2022 Wed 13 Oct 2022 Thu 14 Oct 2022 Fri 15 Oct 2022 Sat 16 Oct 2022 Sun 17 Oct 2022 Mon

01001001

Peterson Construction Res No: 3 Status: Provisional

Contract View Contract Details

Documents

01001001 3

01001002

01001003

01001004

01002001

01002002

01003001

01003002

01003003

01003004

01004001 4

01004002 5

01004003

01004004

ACCOUNT CUSTOMER

Account Code PE002 Corporate Customer Billing Interval On Month End 0

External Account Ref

Description Peterson Construction Order Number Required

Customer Category 5 - Construction Industry Use Item Tariff Prices

General Site Details Contract Details User Defined Fields Private Customer

Volume	Contract	Start Date	End Date	Status	Site Description	Invoice #
1	2	2022/10/11	2022/10/11	Provisional	Apartment Construction	

Edit / View All Contracts On Rent Contracts Outstanding Items Outstanding Contract Balances

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

Account Balance On Rent Total Total Due Available Credit Provisional Customer Statement Pastel Customer Statement Accept Cancel

0.00 0.00 0.00 0.00

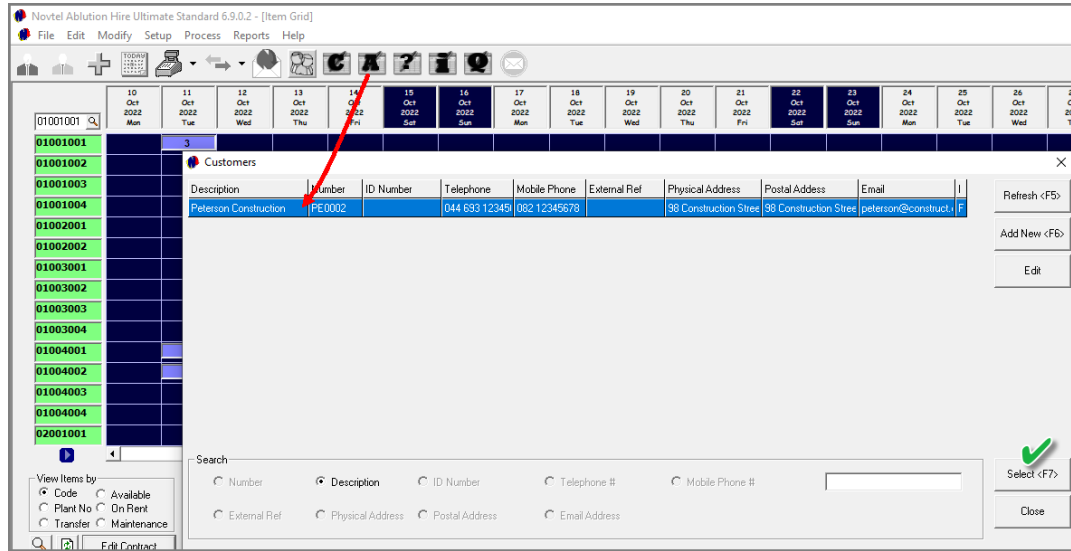
Method 3: From the Customer Master File

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.



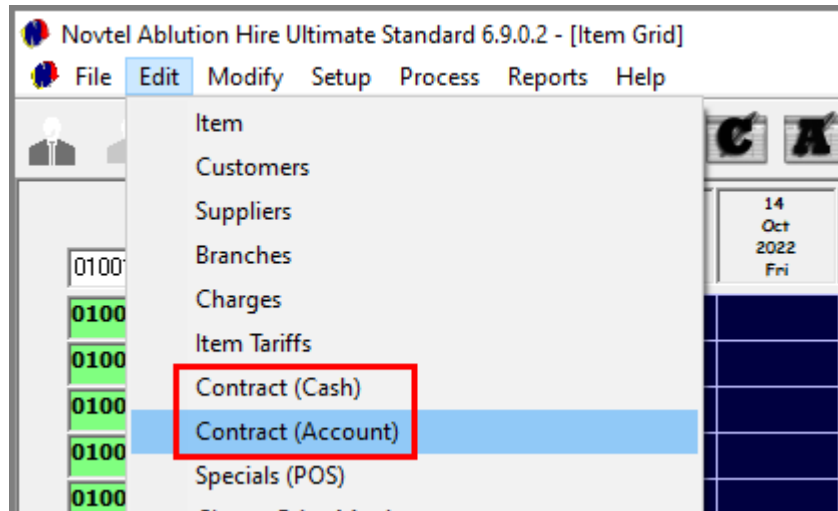
Accessing a Contract



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.



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4

Processing a Deposit Payment

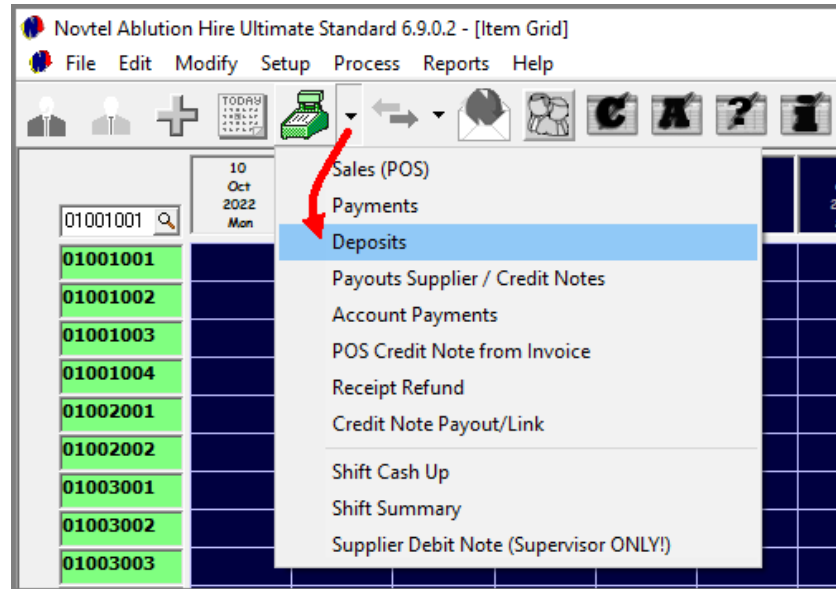


Restrooms





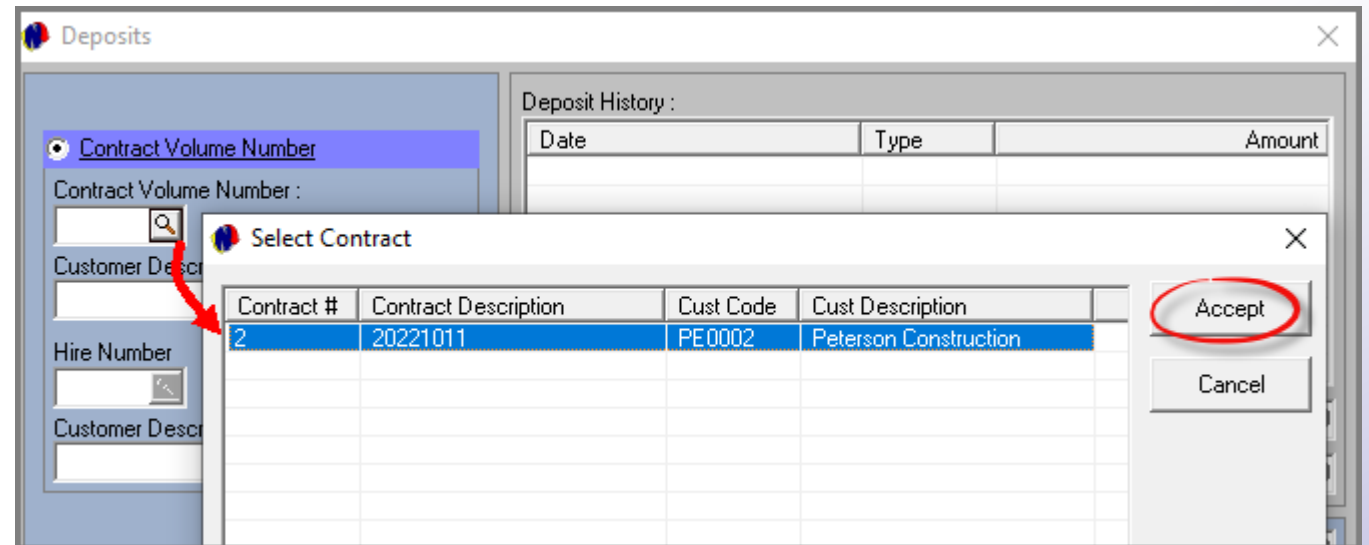
Processing a Deposit Payment



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.





Processing a Deposit Payment

Deposits

Contract Volume Number: 2
Customer Description: PE0002 - Peterson Construction
Hire Number: 2
Customer Description: PE0002 - Peterson Construction

Amount Raised: 500.00
Amount Paid: 0.00

Payment Type: Credit Card
Payment Date: 2022/10/11
Credit Card Number: 789456
Credit Card Type: VISA

Payment Received: 0.00
Change: 0.00

PAYMENT DUE 500.00

User: Danny
Shift #: SFT00002

<F2> - Accept Print to: Screen Print Close

1. The selected contract will now be inserted here.
2. 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.

Deposits

Contract Volume Number: 2
Customer Description: PE0002 - Peterson Construction
Hire Number: 2
Customer Description: PE0002 - Peterson Construction

Amount Raised: 500.00
Amount Paid: 0.00

Payment Type: Credit Card
Payment Date: 2022/10/11
Credit Card Number: 789456
Credit Card Type: VISA

Payment Received: 500
Change: 0.00

PAYMENT DUE 500.00

User: Danny
Shift #: SFT00002

<F2> - Accept Print to: Screen Print Close

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.

Receipt: REC00003

Zoom 100%

Hygiene Experts
44 Green Earth Street
Bellville
Cape Town
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

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

	10 Oct 2022 Mon	11 Oct 2022 Tue	12 Oct 2022 Wed	13 Oct 2022 Thu	14 Oct 2022 Fri	15 Oct 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
01001001		3											
01001002													
01001003													
01001004													
01002001													
01002002													
01003001													
01003002													
01003003													
01003004													
01004001		4											
01004002		5											
01004003													
01004004													
02001001													

View Items by: Code Available Plant No On Rent Transfer Maintenance

Contract 2 Vol 2 20221011
 98 Construction Street Moss Induxtria Mossel Bay 6500 peterson@construct.com
 Mobile Phone 082 12345678 Fax 044 693 123456
 User Defined Field 1 User Defined Field 2 User Defined Field 3 User Defined Field 4 User Defined Field 5

Credit Note 0.00
 Contract Dep Paid 500.00
 Contract Invoice Total 0.00
 Contract Receipt Total 500.00
 Contract Dep Forfeit 0.00
 Contract Dep Relfund 0.00
 Contract Balance 2 -500.00

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 # 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 Branch Monthly Recovery Contract

General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View Financial Kit Group/Quote

1.) Deposit Raised 2022/10/11 Shift #: SFT00002 User: Danny
 Deposit Amount : 500.00 Deposit Due : 2022/10/11 Pay Deposit

2.) Deposit Paid 2022/10/11 1700.00 <<< Suggested Deposit
 Paid Amount : 500.00

3.) Deposit Applied

3.) Dep Fully Refunded

Amount Forfeit : 0.00
 Amount Refunded : 500.00
 Forfeit Percentage : 0 %

Reports to: Screen Print POS Print to: Screen Print

Edit Refund Charge Contract Summary Delivery Note Return Note Close



Processing a Deposit Payment

Contract Details

Contract Volume # 2 20221011 Contract Number: []

Customer Code : PE0002 Peterson Construction Construction Industry

Site Number : PE0002/001 Apartment Construction Last Increment Date : 2022

Branch Mossel Bay, Main Branch Monthly Recovery Contract: []

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

Code	Description	Dur	Qty	Tax	Inclusive
01001001	VIP Toilet Trailer, Blue Loo, 101	0	1	0.00	0.00
01004001	Single Toilet Unit, Blue Loo, 201	0	1	0.00	0.00
01004002	Single Toilet Unit, Blue Loo, 202	0	1	0.00	0.00
.	Additional Costs			0.00	0.00
	Payments Made			0	500.00

DEPOSIT PAID 500.00 CREDIT NOTE 0.00

INVOICE TOTAL 0.00 C N REFUND 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 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 Branch Monthly Recovery Contract: []

General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View **Financial** Kit Group/Quote

Document Num	Amount	Transaction	Time Stamp
REC00003	500.00	Deposit	2022/10/11 12:50:49

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 Branch Monthly Recovery Contract: []

General **Hire Item** Non-Serial Non-Rentals Deposits Payment Detail View Financial KR Group/Quote

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	DHD	S	P	HDA	HD	Rate PH	Ho
2	ZGR00...	Deposit - 500.00		0.00	0.00	N	Confirmed	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	0.0
3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
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	0.0
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	0.0

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



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5

On Rent Items





On Rent Items

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 Branch **Monthly Recovery Contract**

General **Hire Item** Non-Serial Non-Rentals Deposits Payment Detail View Financial Kit Group/Quote

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hou
2	ZGR00...	Deposit - 500.00		0.00	0.00	N	Confirmed	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	0.0
3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
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	0.0
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	0.0

Display <F1> Add New <F3> Remove <F4> Hire Item Select All<F5> Select None <F6> Move Contract <F7>

On Rent <F8> Deliver/Collect <F9> Return <F10> Apply Selection <F2> Rain Day/Off Hire <F11> Amend Contract

Edt ✓ Reports to : Screen Print POS Print to : Screen Print

Refund Charge Contract Summary Delivery Note Return Note

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.

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 Branch **Monthly Recovery Contract**

General **Hire Item** Non-Serial Non-Rentals Deposits Payment Detail View Financial Kit Group/Quote

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hou
<input checked="" type="checkbox"/>	2	ZGR00...		0.00	0.00	N	Confirmed	Deliver	0	0	0	0.00	0	0	0.00	1.00	0.00	0.0
<input checked="" type="checkbox"/>	3	01001001	0501001	90.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
<input checked="" type="checkbox"/>	4	01004001	0501004	40.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
<input checked="" type="checkbox"/>	5	01004002	0501004	40.00	0.00	N	Confirmed	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0

Display <F1> Add New <F3> Remove <F4> **Action - On Rent** Select All<F5> Select None <F6> Move Contract <F7>

On Rent <F8> Deliver/Collect <F9> Return <F10> Hire Item Rain Day/Off Hire <F11> Amend Contract Cancel Item

Reports to : POS Print to : Screen Print

Save Cancel Refund Charge Contract Summary Delivery Note Return Note Close



On Rent Items

Contract Details

Contract Volume # 2 20221011
Customer Code : PE0002 Peterson Construction
Site Number : PE0002/001 Apartment Construction
Branch Mossel Bay, Main Branch

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status
<input checked="" type="checkbox"/>	2	ZGR00... Deposit - 500.00		0.00	0.00	N	Confirmed
<input checked="" type="checkbox"/>	3	01001001 VIP Toilet Trailer, Blue Loo...	0501001	90.00	0.00	N	Confirmed
<input checked="" type="checkbox"/>	4	01004001 Single Toilet Unit, Blue Lo...	0501004	40.00	0.00	N	Confirmed
<input checked="" type="checkbox"/>	5	01004002 Single Toilet Unit, Blue Lo...	0501004	40.00	0.00	N	Confirmed

On Rent Date

1 101 - VIP Toilet Trailer, Blue Loo, 101

Date Out 2 2022/10/11 13:08

3 Charge On Saturday
Charge On Saturday half day
Charge On Sunday
Charge On Public Holiday

4 Hygiene Service Details

Synchronize Service Interval Charge First Service Fee

Fixed Monthly Rent

Fee - Excl/TAX/Incl	5.22	40.00	
Rent - Excl/TAX/Incl	78.26	11.74	90.00

First Service Date 5 2022/10/12

New	Schedule	Existing
<input checked="" type="checkbox"/>	1 Sunday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	2 Monday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	3 Tuesday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	4 Wednesday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	5 Thursday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	6 Friday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	7 Saturday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	8 Day	<input type="checkbox"/>
<input type="checkbox"/>	9 Week	<input type="checkbox"/>
<input type="checkbox"/>	10 Fortnight	<input type="checkbox"/>
<input type="checkbox"/>	11 Monthly	<input type="checkbox"/>
<input type="checkbox"/>	12 None	<input type="checkbox"/>

Existing Hygiene Service Due
Apartment Construction
No Existing Hygiene Items at Site

7 Notes

Accept

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.
3. 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.
7. Notes can be entered if required, and the 'Accept' button clicked to save the settings for this item.



On Rent Items

On Rent Date

201 -- Single Toilet Unit, Blue Loo, 201

Date Out : 2022/10/11 13:13

Charge On Saturday

Charge Saturday half day

Charge On Sunday

Charge On Public Holiday

Hygiene Service Details

Synchronize Service Interval Charge First Service Fee

Fixed Monthly Rent

Fee - Excl/TAX/Incl		
30.43	4.57	35.00

Rent - Excl/TAX/Incl 34.78 5.22 40.00

First Service Date 2022/10/12

New	Schedule	Existing
<input checked="" type="checkbox"/>	1 Sunday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2 Monday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	3 Tuesday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4 Wednesday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	5 Thursday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	6 Friday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	7 Saturday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	8 Day	<input checked="" type="checkbox"/>
<input type="checkbox"/>	9 Week	<input type="checkbox"/>
<input type="checkbox"/>	10 Fortnight	<input type="checkbox"/>
<input type="checkbox"/>	11 Monthly	<input type="checkbox"/>
<input type="checkbox"/>	12 None	<input type="checkbox"/>

Existing Hygiene Service Due
Apartment Construction
Next Service on 2022/10/12

Accept Cancel

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.

On Rent Date

202 -- Single Toilet Unit, Blue Loo, 202

Date Out : 2022/10/11 13:15

Charge On Saturday

Charge Saturday half day

Charge On Sunday

Charge On Public Holiday

Hygiene Service Details

Synchronize Service Interval Charge First Service Fee

Fixed Monthly Rent

Fee - Excl/TAX/Incl		
30.43	4.26	34.69

Rent - Excl/TAX/Incl 35.09 4.91 40.00

First Service Date 2022/10/12

New	Schedule	Existing
<input checked="" type="checkbox"/>	1 Sunday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	2 Monday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	3 Tuesday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	4 Wednesday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	5 Thursday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	6 Friday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	7 Saturday	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	8 Day	<input checked="" type="checkbox"/>
<input type="checkbox"/>	9 Week	<input type="checkbox"/>
<input type="checkbox"/>	10 Fortnight	<input type="checkbox"/>
<input type="checkbox"/>	11 Monthly	<input type="checkbox"/>
<input type="checkbox"/>	12 None	<input type="checkbox"/>

Existing Hygiene Service Due
Apartment Construction
Next Service on 2022/10/12

Accept Cancel



On Rent Items

Contract Details

Contract Volume #: 2 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 Branch Monthly Recovery Contract

Hire Num	Item Code	Item Desc	Tarif Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hou
3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	0.00	N	On Rent	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
4	01004001	Single Toilet Unit, Blue Loo...	0501004	40.00	0.00	N	On Rent	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0
5	01004002	Single Toilet Unit, Blue Loo...	0501004	40.00	0.00	N	On Rent	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.0

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

Reports to: Screen Print POS Print to: Screen Print

Save Cancel Refund Charge Contract Summary Delivery Note Return Note Close

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 Details

Contract Volume #: 2 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 Branch Monthly Recovery Contract

General Hire Item Non-Serial Non-Rentals Deposits Payment **Detail View** Financial Kit Group/Quote

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

Item Code	Description	Serv QTY	Amount
01001001	VIP Toilet Trailer, Blue Loo, 101	1	0.00
01004001	Single Toilet Unit, Blue Loo, 201	1	0.00
01004002	Single Toilet Unit, Blue Loo, 202	1	0.00

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

Reports to: Screen Print POS Print to: Screen Print

Edit Refund Charge Contract Summary Delivery Note Return Note Close

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.

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

	10 Oct 2022 Mon	11 Oct 2022 Tue	12 Oct 2022 Wed	13 Oct 2022 Thu	14 Oct 2022 Fri	15 Oct 2022 Sat
01001001		3				
01001002						
01001003						
01001004						
01002001						
01002002						
01003001						
01003002						
01003003						
01003004						
01004001		4				
01004002		5				
01004003						
01004004						

Item 01004001 tooltip: Peterson Construction Res No: 5 Status: On Rent



On Rent Items – Hygiene Details

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 Branch | Monthly Recovery Contract:

General | Hire Item | Non-Serial | Non-Rentals | Deposits | Payment | Detail View | Financial | Kit Group/Quote

Invoice Number: | ACCOUNT CUSTOMER
Credit Note Number:
Deliver/Collect (Default): Deliver

Start Date: 2022/10/11 | End Date: 2022/10/11 | Fixed Date Contract:
Order Number: | Hygiene Details | Recovery Details
Contract Status: On Rent
Container Number: 2
Discount %: 0 | Fixed Day Limit Rate: Default
Agent Code:
Description:

Reports to: Screen Print | POS Print to: Screen Print

Edit | Refund Charge | Contract | Summary | Delivery Note | Return Note | Close

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

- ✓ 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

Customer: PE0002 | Peterson Construction

Hygiene Contract Details

Expected Contract End Date: 2022/10/11 | Allocate Permanent Instructions to Contract Items

Remarks:

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

Hygiene Contract Item Permanent Notes

Select Item(s) :

Item Code	Item Description
<input checked="" type="checkbox"/> 01001001	VIP Toilet Trailer, Blue Loo, 101
<input checked="" type="checkbox"/> 01004001	Single Toilet Unit, Blue Loo, 201
<input checked="" type="checkbox"/> 01004002	Single Toilet Unit, Blue Loo, 202

Select All Select None

Selected Item Notes/Instructions :

3 Items to be serviced daily.
Hygiene consumables to be charged when filled.
Site Foreman's signature required after each service.

Override to Selected Items Add to Selected Items

Cancel Accept

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

Notes Saved Successfully!

OK

Hygiene Details

Customer PE0002 Peterson Construction

Hygiene Contract Details

Expected Contract End Date: 2022/10/11

Allocate Permanent Instructions to Contract Items

Remarks:

3 Items to be serviced daily.
Hygiene consumables to be charged when filled.
Site Foreman's signature required after each service.

Cancel Accept



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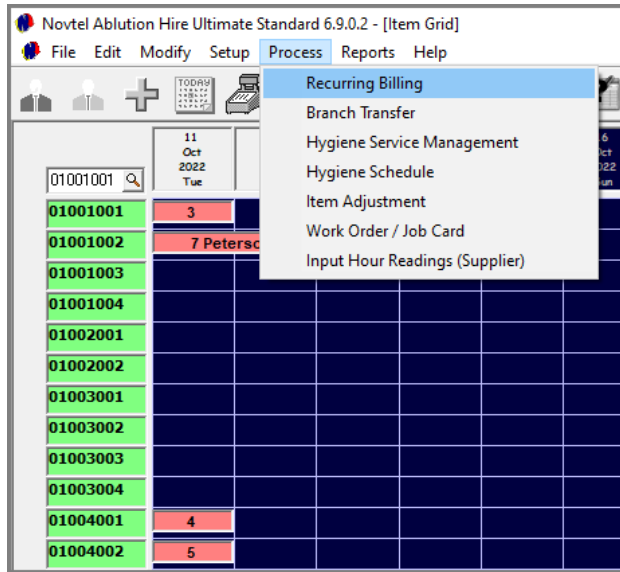
6

The Daily Increment Procedure



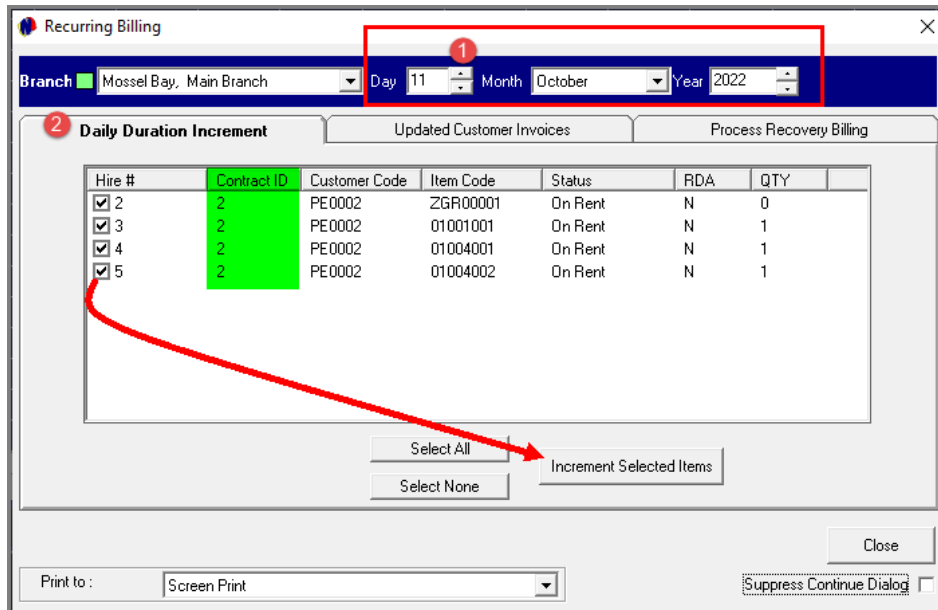


The Daily Increment Procedure



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'.



1. 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.



The Daily Increment Procedure

Month End Options

Print Detailed Pre-Import List
Prints a more detailed version of the Pre-Import List report.

 Proceed >>

To print a more detailed version of the 'pre-import' list, tick this checkbox and click 'Proceed'.

The 'Pre-Increment List' will be opened in your Internet Browser, and will be displayed as follows:

Pre-Increment List From 2022/10/11 To 2022/10/12

PRINTED DATE: 12 OCTOBER 2022 TIME: 10:53:43

CUSTOMER - RENT PER ITEM

HIRE #	CONTRACT	CUSTOMER	ITEM CODE	DESCRIPTION	QTY	CURRENT TOTAL	INCREMENT	RAIN DAY	NEW TOTAL	
3	2	PE0002 - Peterson Construction	01001001	VIP Toilet Trailer, Blue Loo, 101	1	0.00	90.00	0.00	90.00	
4	2	PE0002 - Peterson Construction	01004001	Single Toilet Unit, Blue Loo, 201	1	0.00	40.00	0.00	40.00	
5	2	PE0002 - Peterson Construction	01004002	Single Toilet Unit, Blue Loo, 202	1	0.00	40.00	0.00	40.00	
NUMBER OF ITEMS TO BE UPDATED - 3					TOTALS	3	0.00	170.00	0.00	170.00

SUPPLIER - DUE PER ITEM

HIRE #	CONTRACT	SUPPLIER	ITEM CODE	DESCRIPTION	QTY	CURRENT TOTAL	INCREMENT	RAIN DAY	NEW TOTAL	
TOTAL:						0	0.00	0.00	0.00	0.00

Right-clicking anywhere on the report, the options can be accessed to print or save the report.



The Daily Increment Procedure

Recurring Billing

Branch Day Month Year

Daily Duration Increment Updated Customer Invoices Process Recovery Billing

Hire #	Contract ID	Customer Code	Item Code	Status	RDA	QTY
<input checked="" type="checkbox"/> 2	2	PE0002	ZGR00001	On Rent	N	0
<input checked="" type="checkbox"/> 3	2					1
<input checked="" type="checkbox"/> 4	2					1
<input checked="" type="checkbox"/> 5	2					1

Novtel Equipment Hire

Do you wish to continue with the update ?

Yes No

Select All Increment Selected Items

Select None

Print to :

Suppress Continue

Clicking 'Yes' to continue, the update will run and the 'Daily Duration Increment' tab for the 11th of October is now cleared.

Recurring Billing

Branch Day Month Year

Daily Duration Increment Updated Customer Invoices Process Recovery Billing

Hire #	Contract ID	Customer Code	Item Code	Status	RDA	QTY
--------	-------------	---------------	-----------	--------	-----	-----

Select All Increment Selected Items

Select None

Print to :

Suppress Continue Dialog

Close



The Daily Increment Procedure

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

	11 Oct 2022 Tue	12 Oct 2022 Wed	13 Oct 2022 Thu	14 Oct 2022 Fri
01001001				
01001001	3 Peterson			
01001003				
01001004				
01002001				
01002002				
01003001				
01003002				
01003003				
01003004				
01004001	4 Peterson			
01004002	5 Peterson			

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 Details

Contract Volume #: 2 20221011 Contract Number: 2

Customer Code: PE0002 Peterson Construction Construction Industry

Site Number: PE0002/001 Apartment Construction Last Increment Date: 2022/10/12

Branch: Mossel Bay, Main Branch Monthly Recovery Contract:

General Hire Item Non-Serial Non-Rentals Deposits **Payment** Detail View Financial Kit Group/Quote

Code	Description	Dur	Qty	Tax	Inclusive
01001001	VIP Toilet Trailer, Blue Loo, 101	1	1	11.74	90.00
01004001	Single Toilet Unit, Blue Loo, 201	1	1	5.22	40.00
01004002	Single Toilet Unit, Blue Loo, 202	1	1	4.91	40.00
-	Additional Costs			0.00	0.00
-	Payments Made			0	-500.00

DEPOSIT PAID	CREDIT NOTE
500.00	0.00
INVOICE TOTAL	C N REFUND
170.00	0.00
RECEIPT TOTAL	Recalculate Totals
500.00	Refund Deposit
DEPOSIT REFUND	Refund Due
0.00	Contract Payment
DEPOSIT FORFEIT	
0.00	
PAYMENT DUE	
-330.00	

Reports to: Screen Print POS Print to: Screen Print

Edit Refund Charge Contract Summary Delivery Note Return Note Close



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7

Hygiene Scheduling
and Re-Scheduling

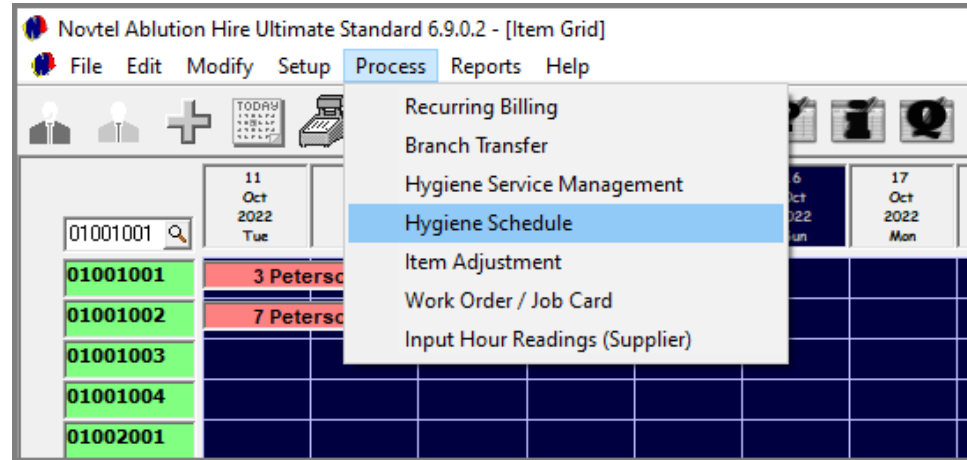


Restrooms



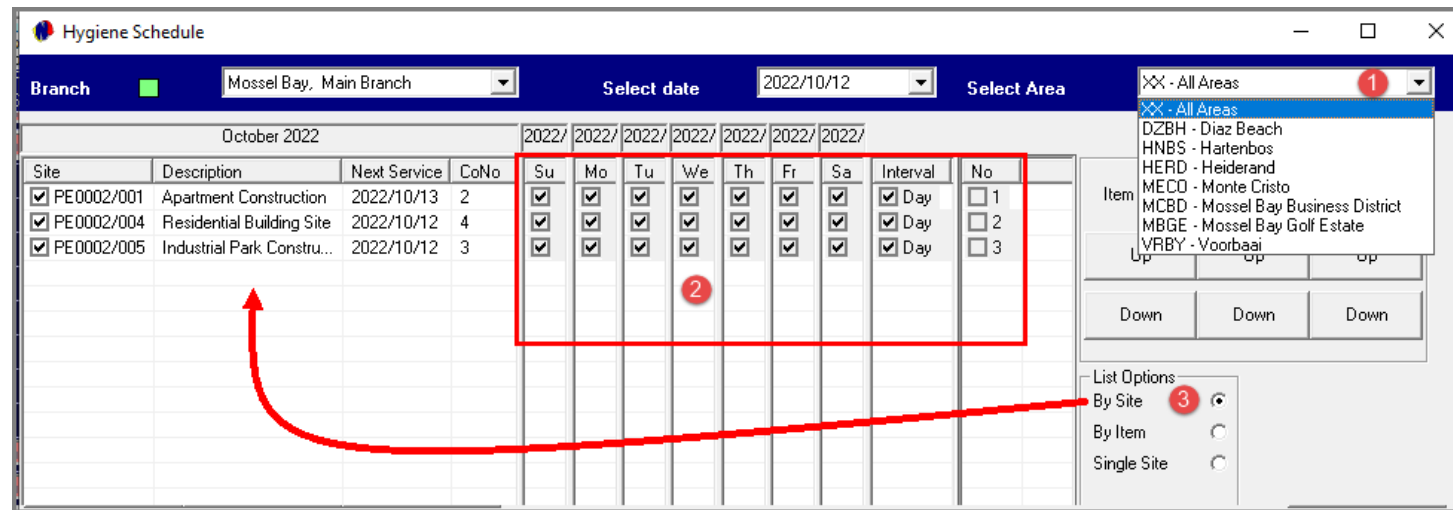


Hygiene Scheduling



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.



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



Hygiene Scheduling

Hygiene Schedule

Branch: Mossel Bay, Main Branch | Select date: 2022/10/12 | Select Area: All Areas

October 2022

Item	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No	
<input checked="" type="checkbox"/>	01001001	VIP Toilet Trailer, Blue...	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input type="checkbox"/> 1
<input checked="" type="checkbox"/>	01001002	VIP Toilet Trailer, Blue...	2022/10/12	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input type="checkbox"/> 2	
<input checked="" type="checkbox"/>	01004001	Single Toilet Unit, Blu...	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input type="checkbox"/> 3	
<input checked="" type="checkbox"/>	01004002	Single Toilet Unit, Blu...	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input type="checkbox"/> 4	
<input checked="" type="checkbox"/>	01004003	Single Toilet Unit, Blu...	2022/10/12	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input type="checkbox"/> 5	
<input checked="" type="checkbox"/>	01004004	Single Toilet Unit, Blu...	2022/10/12	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	<input type="checkbox"/> 6	

Item Scroll | Page Scroll | Max Scroll

Up | Up | Up

Down | Down | Down

List Options:
 By Site
 By Item
 Single Site

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

List Options

By Site

By Item

Single Site

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.

Customers

Description	Number	ID Number	Telephone	Mobile Phone	External Ref	Physical Address	Postal Address	Email	I
Customer Cash	CU0001	1234567891011	044 12345678	082 12345678		123 Jasper Ave	PO Box 123		F
Maintenance Customer	MAD001	147258369	1145458787	898965		45454545454	12121221		F
Peterson Construction	PE0002		044 693 12345	082 12345678		98 Construction Street	98 Construction Street	peterson@construct.	F

Refresh <F5>

Add New <F6>

Edit

Search

Number Description ID Number Telephone # Mobile Phone #

External Ref Physical Address Postal Address Email Address

Select <F7>

Close

Customer Delivery Address Setup

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

Select Edit Delete Add Close



Hygiene Scheduling

Hygiene Schedule

Branch: Mossel Bay, Main Branch | Select date: 2022/10/12 | Select Area: XX - All Areas

Site	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No
<input checked="" type="checkbox"/>	PE0002/001 Apartment Construction	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> 1
<input checked="" type="checkbox"/>	PE0002/004 Residential Building Site	2022/10/12	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> 2
<input checked="" type="checkbox"/>	PE0002/005 Industrial Park Constru...	2022/10/12	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/> Day	<input type="checkbox"/> 3

List Options: **By Site** (checked), By Item, Single Site

Schedule Options: Not Selected, Un-Scheduled, **Re-Schedule** (checked)

Contract

Select All <F2> | Select None <F3> | **Print Schedule <F4>** (checked) | 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

Hygiene Schedule Report

Area - XX - All Areas Branch - Mossel Bay, Main Branch

Report Date - 2022/10/12 Schedule from - 09 October 2022 to 15 October 2022

Site	Description	Next Service	Co Vol	So	Mo	Tu	We	Th	Fr	Sa	Interval
PE0002/001	Apartment Construction	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
PE0002/004	Residential Building Site	2022/10/12	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
PE0002/005	Industrial Park Construction	2022/10/12	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day



Hygiene Service Re-Scheduling

Branch: Mossel Bay, Main Branch | Select date: 2022/10/12 | Select Area: All Areas

Item	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No
01001001	VIP Toilet Trailer, Blue...	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	1
01001002	VIP Toilet Trailer, Blue...	2022/10/12	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	2
01004001	Single Toilet Unit, Blu...	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	3
01004002	Single Toilet Unit, Blu...	2022/10/13	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	4
01004003	Single Toilet Unit, Blu...	2022/10/12	3	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	5
01004004	Single Toilet Unit, Blu...	2022/10/12	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	6

List Options: By Site, By Item, Single Site

Schedule Options: Not Selected, Un-Scheduled, **Re-Schedule**

Schedule New: **1 Sunday**, 2 Monday, 3 Tuesday, 4 Wednesday, 5 Thursday, 6 Friday, 7 Saturday, 8 Day, 9 Week, 10 Foreight, 11 Months, 12 None

Buttons: Display New <F8>, Apply New <F5>, Close

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.

Branch: Mossel Bay, Main Branch | Select date: 2022/10/12 | Select Area: All Areas

Item	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No
01001001	VIP Toilet Trailer, Blue...	2022/10/13	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	1
01001002	VIP Toilet Trailer, Blue...	2022/10/13	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	2
01004001	Single Toilet Unit, Blu...	2022/10/13	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	3
01004002	Single Toilet Unit, Blu...	2022/10/13	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	4
01004003	Single Toilet Unit, Blu...	2022/10/13	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	5
01004004	Single Toilet Unit, Blu...	2022/10/13	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day	6

List Options: By Site, By Item, Single Site

Schedule Options: Not Selected, Un-Scheduled, **Re-Schedule**

Schedule New: 1 Sunday, 2 Monday, 3 Tuesday, 4 Wednesday, 5 Thursday, 6 Friday, 7 Saturday, 8 Day, 9 Week, 10 Foreight, 11 Months, 12 None

Buttons: Display New <F8>, Apply New <F5>, Close

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.

Novtel Equipment Hire

Would you like to continue updating selected Sites with new Schedule settings?

Yes No



Hygiene Service Re-Scheduling

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

Hygiene Schedule Report											
Area - XX - All Areas Branch - Mossel Bay, Main Branch											
Report Date - 2022/10/12 Schedule from - 09 October 2022 to 15 October 2022											
Item	Description	Next Service	Co Vol	So	Mo	Tu	We	Th	Fr	Sa	Interval
01001001	VIP Toilet Trailer, Blue Loo, 101	2022/10/13	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
01001002	VIP Toilet Trailer, Blue Loo, 102	2022/10/13	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
01004001	Single Toilet Unit, Blue Loo, 201	2022/10/13	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
01004002	Single Toilet Unit, Blue Loo, 202	2022/10/13	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
01004003	Single Toilet Unit, Blue Loo, 203	2022/10/13	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day
01004004	Single Toilet Unit, Blue Loo, 204	2022/10/13	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Day



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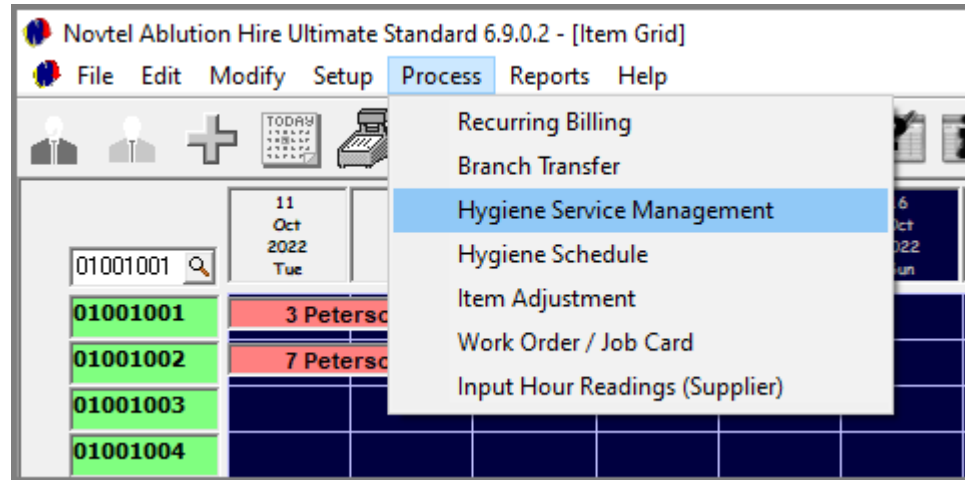
8

Hygiene Service Management



Restrooms →





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

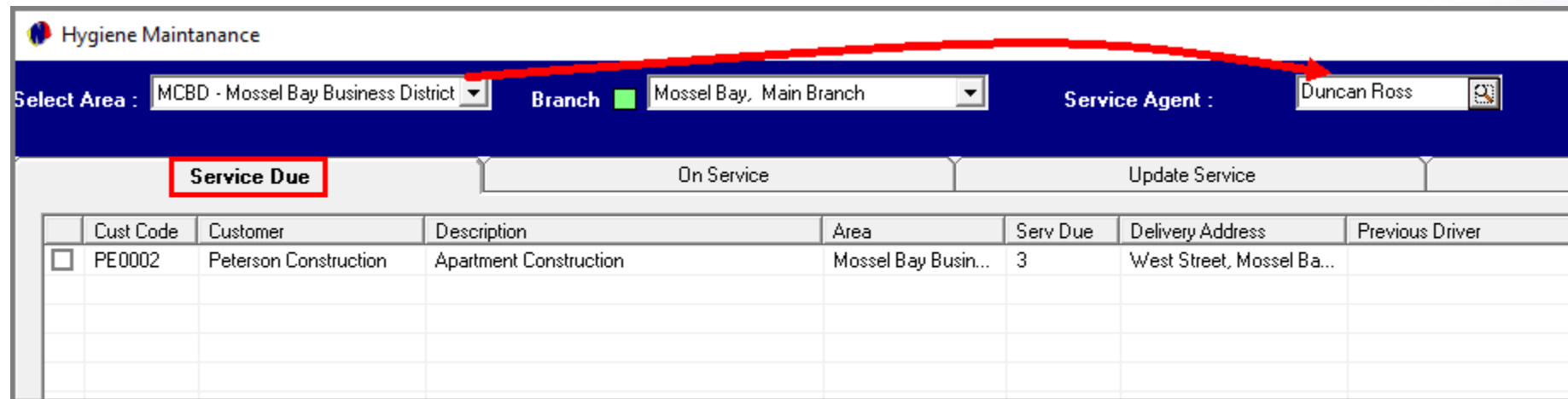
The 'Site Sequence' can also be set to pre-plan a route for the service agent to follow and save time and money by working through the sites methodically.

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

The Service Due Tab

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.





Item Code	Description	Hire #	Area	Serv Due Date	Instructions	Customer	Delivery Address
<input checked="" type="checkbox"/>	01001001	VIP Toilet Trailer, Blue Loo, 101	3	Mossel Bay Busin...	2022/10/12	PE0002 - Peterson Con...	West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004001	Single Toilet Unit, Blue Loo, 201	4	Mossel Bay Busin...	2022/10/12	PE0002 - Peterson Con...	West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004002	Single Toilet Unit, Blue Loo, 202	5	Mossel Bay Busin...	2022/10/12	PE0002 - Peterson Con...	West Street, Mossel Ba...

- **Adding Instructions per Item – If Applicable**

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.

Hygiene Instructions

01001001 - VIP Toilet Trailer, Blue Loo, 101

1 of 3

Instructions / Notes

Demonstration Note for VIP Trailer,

Accept

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'.



Hygiene Maintenance

Select Area: MCB - Mossel Bay Business District Branch: Mossel Bay, Main Branch

Item Code	Description
<input checked="" type="checkbox"/> 01001001	VIP Toilet Trailer, Blue Loo, 101
<input checked="" type="checkbox"/> 01004001	Single Toilet Unit, Blue Loo, 201
<input checked="" type="checkbox"/> 01004002	Single Toilet Unit, Blue Loo, 202

Hygiene Instructions - 01004001 - Single Toilet Unit, Blue Loo, 201

Hygiene Service Instructions

2 of 3

Instructions / Notes

Demonstration Note for 1st Single Toilet Unit

1. >> Add Instructions Select All
2. >> Site Sequence 2022/10/12
3. >> Print Service Cancel Service

Accept Cancel

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.

Hygiene Maintenance

Select Area: MCB - Mossel Bay Business District Branch: Mossel Bay, Main Branch

Item Code	Description
<input checked="" type="checkbox"/> 01001001	VIP Toilet Trailer, Blue Loo, 101
<input checked="" type="checkbox"/> 01004001	Single Toilet Unit, Blue Loo, 201
<input checked="" type="checkbox"/> 01004002	Single Toilet Unit, Blue Loo, 202

Hygiene Instructions - 01004002 - Single Toilet Unit, Blue Loo, 202

Hygiene Service Instructions

3 of 3

Instructions / Notes

Demonstration Note for second Single Toilet Unit

1. >> Add Instructions Select All
2. >> Site Sequence 2022/10/12
3. >> Print Service Cancel Service

Accept Cancel

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

Hygiene Maintenance

Select Area: MCB - Mossel Bay Business District Branch: Mossel Bay, Main Branch Service Agent: Duncan Ross

Service Due		On Service	Update Service	Next Service				
Item Code	Description	Hire #	Area	Serv Due Date	Instructions	Site #	Customer	Delivery Address
<input type="checkbox"/> 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 Ba...
<input type="checkbox"/> 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 Ba...
<input type="checkbox"/> 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 Ba...



Hygiene Maintenance

Select Area : MCBD - Mossel Bay Business District Branch Mossel Bay, Main Branch Service Agent : Duncan Ross

Item Code	Description	Hire #	Area	Serv Due Date	Instructions	Site #	Customer	Delivery Address
<input type="checkbox"/> 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 Ba...
<input type="checkbox"/> 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 Ba...
<input type="checkbox"/> 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 Ba...

1. >> Add Instructions Select All Deselect all
 2. >> Site Sequence 2022/10/12 Re-Schedule Item(s)
 3. >> Print Service Cancel Service

Display Option: View by Site, View by Item Code, Reprint Transaction
 Search Filter: Show All, Specific Day

Print to : Screen Print

• 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.

Hygiene Maintenance

Select Area : HNBS - Hartenbos Area Code : []

Item Code	Description
<input type="checkbox"/> 07001002	VIP Toilet Trailer, Blue Loo, 102
<input type="checkbox"/> 07002001	Paraplegic Toilet Trailer, Blue Loo, 201
<input type="checkbox"/> 07003001	12 Toilet Trailer, Blue Loo, 301
<input type="checkbox"/> 07004004	Single Toilet Unit, Blue Loo, 404

1. >> Add Instructions Select All
 2. >> Site Sequence
 3. >> Print Service Cancel Service

Available areas

Search By Code Search For

Code	Description
DZBH	Diaz Beach
GRGE	George
HERD	Heiderand
HNBS	Hartenbos ✓
HSEE	Hartenbos Estate
MCBD	Mossel Bay CBD
MECO	Monte Cristo
MYGE	Mossel Bay Golf Estate
VRBY	Voorbaai

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.



Area Code : HNBS Hartenbos

Seque...	ID	Site	Suburb
0	M000...	Amphi Theatre Hartenbos	Hartenbos
0	PE000...	52 Seafront Street	Hartenbos

Accept Cancel

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'.

Select Area : HNBS - Hartenbos

Service Due

Description	Serv
<input type="checkbox"/> Amphi Theatre Hartenbos	3
<input type="checkbox"/> 52 Seafront Street	1

Area Code : HNBS Hartenbos

Seque...	ID	Site	Suburb
1	PE000...	52 Seafront Street	Hartenbos
2	M000...	Amphi Theatre Hartenbos	Hartenbos



Hygiene Maintenance

Select Area : Branch Service Agent :

Service Due On Service Update Service Next Service

Item Code	Description	Hire #	Area	Serv Due Date	Instructions	Customer	Delivery Address
<input checked="" type="checkbox"/>	01001001	VIP Toilet Trailer, Blue Loo, 101	3	Mossel Bay Busin...	2022/10/12	Demonstration Note for ...	PE0002 - Peterson Con... West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004001	Single Toilet Unit, Blue Loo, 201	4	Mossel Bay Busin...	2022/10/12	Demonstration Note for ...	PE0002 - Peterson Con... West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004002	Single Toilet Unit, Blue Loo, 202	5	Mossel Bay Busin...	2022/10/12	Demonstration Note for ...	PE0002 - Peterson Con... West Street, Mossel Ba...

1. >> Add Instructions Display Option
 2. >> Site Sequence View by Site
 3. >> Print Service View by Item Code
 Reprint Transaction

Search Filter
 Show All
 Specific Day

Print to :

• 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 Description	Contract #	Volume #	Amount	Plant #
1	PE0002/001 Apartment Construction	West Street, Mossel Bay Golf Estate	Peterson Construction	082 123654	3
01001001	VIP Toilet Trailer, Blue Loo, 101	2	2	0.00	101
01004001	Single Toilet Unit, Blue Loo, 201	2	2	0.00	201
01004002	Single Toilet Unit, Blue Loo, 202	2	2	0.00	202



Hygiene Service Management

The Service Due Tab

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:

1. If captured, the Note or Instruction is displayed for the specific Item.
2. All Hygiene Consumables set up in the system will be 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 Service Schedule				
Area - XX - All Areas Mossel Bay, Main Branch				
Service Date - 2022/10/13 Service Agent - Duncan Ross				
Site	Site Address	Customer Name	Site Phone No	To Service SEQ
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

Zoom 75%

Hygiene Experts
 44 Green Earth Street
 Bellville
 Cape Town
 8000
 Tel : 044 123456
 Fax :
 VAT : 123456789

Hygiene Service Instruction

01001001 VIP Toilet Trailer, Blue Loo, 101 Maint

AF Lavender___ AF Orange___ AF Ocean___ SOAP___ T Block___ T Paper___

01004001 Single Toilet Unit, Blue Loo, 201 Maint

AF Lavender___ AF Orange___ AF Ocean___ SOAP___ T Block___ T Paper___

01004002 Single Toilet Unit, Blue Loo, 202 Maint

AF Lavender___ AF Orange___ AF Ocean___ SOAP___ T Block___ T Paper___

Contract/Volume 2/2
 Customer : PE0002 - Peterson Construction
 Site Address : West Street
 Mossel Bay Golf Estate
 Mossel Bay
 6500

Staff member : Danny
 Print Date : 2022/10/13
 Time : 07:20:57
 Service Agent : Duncan Ross
 Service Instruction : SI000002

Thank You.

Date _____

Time _____

Name _____

Signature _____

Service Instruction

Zoom 100%

Hygiene Experts
 44 Green Earth Street
 Bellville
 Cape Town
 8000
 Tel : 044 123456
 Fax :
 VAT : 123456789

Hygiene Service Instruction

01004004 Single Toilet Unit, Blue Loo, 204 Maint

AF Lavender___ AF Orange___ AF Ocean___ SOAP___ T Block___ T Paper___

Contract/Volume 4/4
 Customer : PE0002 - Peterson Construction
 Site Address : 56 Yellow Road
 Monte Cristo
 6533

Staff member : Danny
 Print Date : 2022/10/13
 Time : 07:23:09
 Service Agent : Duncan Ross
 Service Instruction : SI000003

Thank You.

Date _____

Time _____

Name _____

Signature _____

Service Instruction

Zoom 100%

Hygiene Experts
 44 Green Earth Street
 Bellville
 Cape Town
 8000
 Tel : 044 123456
 Fax :
 VAT : 123456789

Hygiene Service Instruction

01001002 VIP Toilet Trailer, Blue Loo, 102 Maint

AF Lavender___ AF Orange___ AF Ocean___ SOAP___ T Block___ T Paper___

01004003 Single Toilet Unit, Blue Loo, 203 Maint

AF Lavender___ AF Orange___ AF Ocean___ SOAP___ T Block___ T Paper___

Contract/Volume 3/3
 Customer : PE0002 - Peterson Construction
 Site Address : Stevens Close
 Voorbaai
 Mossel Bay
 6500

Staff member : Danny
 Print Date : 2022/10/13
 Time : 07:24:03
 Service Agent : Duncan Ross
 Service Instruction : SI000004

Thank You.

Date _____

Time _____

Name _____

Signature _____



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 Maintenance

Select Area : Branch Service Agent :

Service Due | On Service | Update Service

Cust Code	Customer	Description	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.



Hygiene Service Management

The 'On Service' Tab

Description	Customer	Delivery Address	Due Date	On Service	Sequence	Area	Captured
<input type="checkbox"/> Apartment Construction	PE0002 - Peterson Con...	West Street, Mossel Ba...	2022/10/12	3	1	Mossel Bay Busin...	

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.

ItemCode	Description	Doc #	Service Date	Due Date	Hire #	Area	Driver	Site	Captured	Customer	Delivery Address
<input checked="" type="checkbox"/> 01001001	VIP Toilet Trailer, Blue Loo, 101	S1000001	2022/10/12	2022/10/12	3	Mossel B...	Duncan ...	Apartment Const...		PE0002 - Peterson Con...	West Street, Mossel Ba...
<input type="checkbox"/> 01004001	Single Toilet Unit, Blue Loo, 201	S1000001	2022/10/12	2022/10/12	4	Mossel B...	Duncan ...	Apartment Const...		PE0002 - Peterson Con...	West Street, Mossel Ba...
<input type="checkbox"/> 01004002	Single Toilet Unit, Blue Loo, 202	S1000001	2022/10/12	2022/10/12	5	Mossel B...	Duncan ...	Apartment Const...		PE0002 - Peterson Con...	West Street, Mossel Ba...

1. 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.



Hygiene Transactions

PE0002/001 - Apartment Construction

VIP Toilet Trailer, Blue Loo, 101

NEXT SITE START

Service Date : 1 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
	0	
	0	
	0	
	0	
	0	

Accept Cancel

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'.

Hygiene Maintenance

Select Area : MCB - Mossel Bay Business District Branch : Mossel Bay, Main Branch Service Agent : Duncan Ross

ItemCode	Description	Doc #	Service Date	Due Date	Hire #	Area	Driver	Site	Captured	Customer	Delivery Address
<input checked="" type="checkbox"/>	01001001 VIP Toilet Trailer, Blue Loo, 101	SI000001	2022/10/12	2022/10/12	3	Mossel B...	Duncan ...	Apartment Const...	Danny	PE0002 - Peterson Con...	West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004001 Single Toilet Unit, Blue Loo, 201	SI000001	2022/10/12	2022/10/12	4	Mossel B...	Duncan ...	Apartment Const...		PE0002 - Peterson Con...	West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004002 Single Toilet Unit, Blue Loo, 202	SI000001	2022/10/12	2022/10/12	5	Mossel B...	Duncan ...	Apartment Const...		PE0002 - Peterson Con...	West Street, Mossel Ba...

Select All Add Consumables Deselect all

2022/10/12 Re-Schedule Item(s) Cancel Service

Display Option: View by Site View by Item Code

Search Filter: Show Details Show Consumables Specific Service Agent Hide Captured

Print to : Screen Print

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

The 'On Service' Tab

Hygiene Maintenance

Select Area : MCBG - Mossel Bay Business District Branch : Mossel Bay, Main Branch Service Agent : Duncan Ross

Service Due **On Service** Update Service Next

ItemCode	Description	Doc #	AF La...	AF Or...	AF O...	SOAP	T Block	T Paper	
<input type="checkbox"/>	01001001	VIP Toilet Trailer, Blue Loo, 101	SI000001	2	0	0	2	2	8
<input type="checkbox"/>	01004001	Single Toilet Unit, Blue Loo, 201	SI000001	0	1	0	0	1	3
<input type="checkbox"/>	01004002	Single Toilet Unit, Blue Loo, 202	SI000001	0	0	1	0	0	2

Select All Add Consumables Deselect all

2022/10/12 Re-Schedule Item(s) Cancel Service

Display Option
View by Site
View by Item Code

Search Filter
Show Details Specific Date
Show Consumables
Specific Service Agent
Hide Captured

Print to : Screen Print

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.



Hygiene Service Management

The 'Update Service' Tab

Hygiene Maintenance

Select Area : MCDD - Mossel Bay Business District Branch : Mossel Bay, Main Branch Service Agent : Duncan Ross

Service Due On Service **Update Service** Next Service Service History

ItemCode	Description	Doc #	Service Date	Type	Area	Hire #	Due Date	Driver	Captured	Customer	Delivery Address	
<input checked="" type="checkbox"/>	01001001	VIP Toilet Trailer, Blue Loo, 101	SI000001	2022/10/12	Maint	Mossel Bay Busin...	3	2022/10/12	Duncan Ross	Danny	PE0002 - Peterson Con...	West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004001	Single Toilet Unit, Blue Loo, 201	SI000001	2022/10/12	Maint	Mossel Bay Busin...	4	2022/10/12	Duncan Ross	Danny	PE0002 - Peterson Con...	West Street, Mossel Ba...
<input checked="" type="checkbox"/>	01004002	Single Toilet Unit, Blue Loo, 202	SI000001	2022/10/12	Maint	Mossel Bay Busin...	5	2022/10/12	Duncan Ross	Danny	PE0002 - Peterson Con...	West Street, Mossel Ba...

Select All 2 Complete Service 3 Deselect all

Display Option
View by Site
View by Item Code 1

Print to : Screen Print Close

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 Maintenance

Select Area : MCDD - Mossel Bay Business District Branch : Mossel Bay, Main Branch Service Agent : Duncan Ross

Service Due On Service **Update Service** Next Service Service History

ItemCode	Description	Doc #	Service Date	Type	Area	Hire #	Due Date	Driver	Captured	Customer	Delivery Address
----------	-------------	-------	--------------	------	------	--------	----------	--------	----------	----------	------------------

Select All Deselect all

Display Option
View by Site
View by Item Code

Print to : Screen Print Close

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



Hygiene Service Management

The 'Update Service' Tab

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: 2022/10/12

Branch: Mossel Bay, Main Branch | Monthly Recovery Contract

General | Hire Item | Non-Serial | **Non-Rentals** | Deposits | Payment | Detail View | Financial | Kit Group/Quote

Line Type	Charge	Description	Qty	Excl	Tax	Incl
Item	SER001	Service - VIP Toilet Trailer	1	34.78	5.22	40.00
Item	AIR002	Air Freshener - Lavender 100ml	2	34.78	5.22	40.00
Item	LHS001	Liquid Hand Soap - 250ml	2	26.32	3.68	30.00
Item	SAN001	Sanitizer - toilet block	3	39.13	5.87	45.00
Item	TPR001	Toilet Paper per Roll	13	28.26	4.24	32.50
Item	SER005	Service - Single Toilet Unit	2	60.60	9.09	69.69
Item	AIR003	Air Freshener - Orange Blossom 100ml	1	17.39	2.61	20.00
Item	AIR005	Air Freshener - Ocean Fresh 100ml	1	17.39	2.61	20.00
			258.65	38.54	297.19	

Please note that each time consumables are added, and the Hygiene Service is updated, the items will be accumulated in the Contract's 'Non-Rentals' tab as follows:

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: 2022/10/12

Branch: Mossel Bay, Main Branch | Monthly Recovery Contract

General | Hire Item | Non-Serial | Non-Rentals | Deposits | **Payment** | Detail View | Financial | Kit Group/Quote

Code	Description	Dur	Qty	Tax	Inclusive
01001001	VIP Toilet Trailer, Blue Loo, 101	1	1	11.74	90.00
01004001	Single Toilet Unit, Blue Loo, 201	1	1	5.22	40.00
01004002	Single Toilet Unit, Blue Loo, 202	1	1	4.91	40.00
-	Additional Costs			38.54	297.19
-	Payments Made		0		-500.00

DEPOSIT PAID	CREDIT NOTE
500.00	0.00
INVOICE TOTAL	C N REFUND
467.19	0.00
RECEIPT TOTAL	Recalculate Totals
500.00	Refund Deposit
DEPOSIT REFUND	Refund Due
0.00	Contract Payment
DEPOSIT FORFEIT	
0.00	
PAYMENT DUE	
-32.81	

Reports to: Screen Print | POS Print to: Screen Print

Edit | Refund Charge | Contract | Summary | Delivery Note | Return Note | Close

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.



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9

The Hygiene Route Sheet

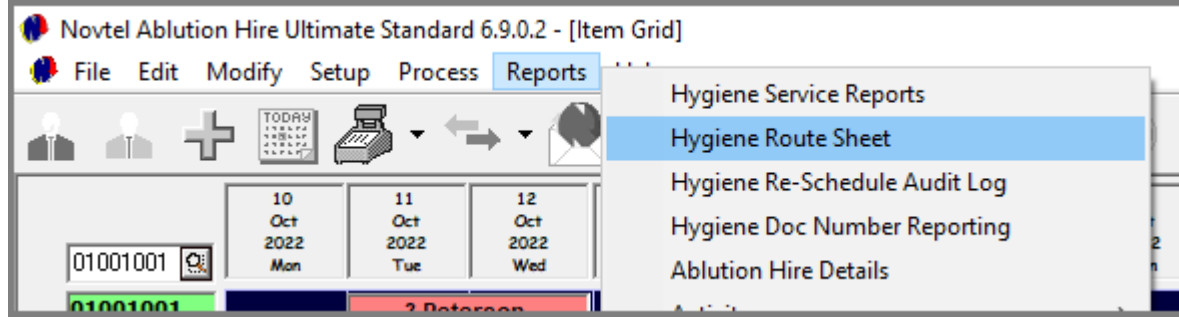


Restrooms





The Hygiene Route Sheet

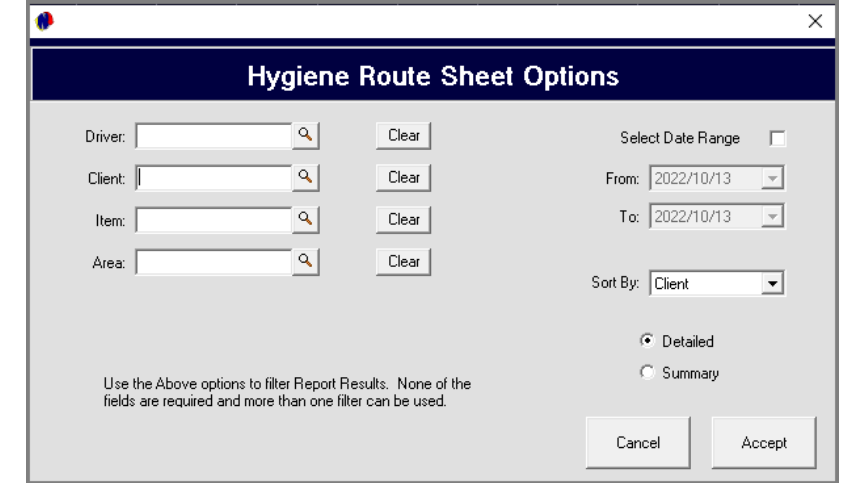


The 'Hygiene Route Sheet' can be printed using any, none, or all of the filter options:

- ✓ Driver
- ✓ 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.



Hygiene Experts

44 Green Earth Street
Bellville
Cape Town
8000

044 123456

Hygiene Route Sheet

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.	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.	
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.	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.	
204	PE0002 - Peterson Construction	Monte Cristo	56 Yellow Road, Monte Cristo, 6533.	Tiaan	084 456213	Duncan Ross			
203	PE0002 - Peterson Construction	Voorbaal	Stevens Close, Voorbaal, Mossel Bay, 6500.	Quinton	083 214567	Duncan Ross			
102	PE0002 - Peterson Construction	Voorbaal	Stevens Close, Voorbaal, Mossel Bay, 6500.	Quinton	083 214567	Duncan Ross			



The Hygiene Route Sheet

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

The screenshot displays the Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid] application. The main window is titled 'Contract Details' and contains the following information:

- Contract Volume #: 2
- Contract Number: 2
- Customer Code: PE0002 (Peterson Construction)
- Site Number: PE0002/001 (Apartment Construction)
- Branch: Mossel Bay, Main Branch
- Construction Industry
- Last Increment Date: 2022/10/13
- Monthly Recovery Contract

The 'Hygiene Details' window is open, showing:

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

A red arrow points from the 'Hygiene Details' button in the main window to the 'Hygiene Details' window. A green checkmark is visible next to the 'Allocate Permanent Instructions to Contract Items' checkbox.



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10

Manually Adding Non-Rental Charges to a Contract



Restrooms





Manually Adding Non-Rental Charges to a Contract

Contract Details

Contract Volume #: 2 20221011

Customer Code: PE0002 Peterson Construction

Site Number: PE0002/001 Apartment Construction

Branch: Mossel Bay, Main Branch

General Hire Item Non-Serial **Non-Rentals** Deposits Payment

Line Type	Charge	Description	Qty	Excl	Tax
Item	SER001	Service - VIP Toilet Trailer	1	34.78	5.22
Item	AIR002	Air Freshener - Lavender 100ml	2	34.78	5.22
Item	LHS001	Liquid Hand Soap - 250ml	2	26.32	3.68
Item	SAN001	Sanitizer - toilet block	3	39.13	5.87
Item	TPR001	Toilet Paper per Roll	13	28.26	4.24
Item	SER005	Service - Single Toilet Unit	2	60.60	9.09
Item	AIR003	Air Freshener - Orange Blossom 100ml	1	17.39	2.61
Item	AIR005	Air Freshener - Ocean Fresh 100ml	1	17.39	2.61

258.65 38.54

Refresh Add Remark Add

Reports to: Screen Print

Save Cancel Refund Charge Contract Summary

Select Charge

Search

Search By: Code

Search For:

Code	Description	Excl	Tax	Incl
FDR001	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
REP003	Replacement Charge	0.00	0.00	0.00
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
SDR001	Soap Dispenser	217.39	32.61	250.00
SER001	Service - VIP Toilet Trailer	43.48	6.52	50.00
SER002	Service - VIP Shower/Toilet Combo	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 Trailer	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
WEG001	Wheateater Gut 50m	43.86	6.14	50.00
WPB001	Waste Bin	217.39	32.61	250.00

Accept 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 'Add'.

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

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: 2022/10/13

Branch: Mossel Bay, Main Branch Monthly Recovery Contract

General Hire Item Non-Serial **Non-Rentals** Deposits Payment Detail View Financial KR Group/Quote

Line Type	Charge	Description	Qty	Excl	Tax	Incl
Item	AIR002	Air Freshener - Lavender 100ml	2	34.78	5.22	40.00
Item	LHS001	Liquid Hand Soap - 250ml	2	26.32	3.68	30.00
Item	SAN001	Sanitizer - toilet block	3	39.13	5.87	45.00
Item	TPR001	Toilet Paper per Roll	13	28.26	4.24	32.50
Item	SER005	Service - Single Toilet Unit	2	60.60	9.09	69.69
Item	AIR003	Air Freshener - Orange Blossom 100ml	1	17.39	2.61	20.00
Item	AIR005	Air Freshener - Ocean Fresh 100ml	1	17.39	2.61	20.00
Item	WPB001	Waste Bin	1	217.39	32.61	250.00
Remark		Item was removed, and had to be replaced				
			476.05	71.14	547.19	

Refresh Add Remark Add Delete

Reports to: Screen Print POS Print to: Screen Print

Save Cancel Refund Charge Contract Summary Delivery Note Return Note Close

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.

Proforma Invoice

Date: 2022/10/13

End Date: 2022/10/11

Invoice Number:

Hygiene Experts
44 Green Earth Street
Belville
Cape Town
8000

Tel: 044 123456

Fax:

Email:

VAT No: 123456789

Peterson Construction PE0002
58 Construction Street
Mossel Bay
6500

Cellular #: 082 12345678

Customer Contact #: 044 693 123456

Site: Apartment Construction

VAT No: 123456789

HIRE ITEMS:

Contract Number: 2 Contract Volume Number: 2 Order Number:

Code	Hire #	Description	QTY	HD	Hour	Tax	Incl
01001001	3	VIP Toilet Trailer, Blue Loo, 101	1	2.00	0.00	23.48	180.00
Serial #		ABC123					
01004001	4	Single Toilet Unit, Blue Loo, 201	1	2.00	0.00	10.43	80.00
Serial #		ZXC123					
01004002	5	Single Toilet Unit, Blue Loo, 202	1	2.00	0.00	9.82	80.00
Serial #		ZXC456					
Hire Items Total:						R43.74	R340.00

NON RENTALS:

Code	Description	Qty	Tax	Incl Amount
SER001	Service - VIP Toilet Trailer	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 replaced	1.00	R32.61	R250.00
Non Rentals Total:			R71.14	R547.19

RECEIPTS:

Document #	Description	Date	Type	Amount
REC00003	Contract Deposit	2022/10/11	3	R500.00
Receipt Total:				R500.00



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11

Returning and Invoicing an Item





Returning and Invoicing an Item

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: 2022/10/13

Branch: Mossel Bay, Main Branch | Monthly Recovery Contract

General | Hire Item | Non-Serial | Non-Rentals | Deposits | Payment | Detail View | Financial | Kit Group/Quote

Invoice Number: | ACCOUNT CUSTOMER

Credit Note Number: |

Deliver/Collect (Default): Deliver

Start Date: 2022/10/11 | End Date: 2022/10/13 | Fixed Date Contract:

Order Number: |

Contract Status: On Rent | Hygiene Details | Recovery Details

Container Number: 2

Discount %: 0

Agent Code: | Description: |

Reports to: | Screen Print | Refund Charge

Buttons: Edit ✓, Refund Charge

All rented items can be returned simultaneously, or only selected items can be returned and invoiced.

Clicking on the 'Hire Item' tab, all Items are currently linked to the 'On-Rent' status.

To make any changes, the 'Edit' button must be clicked.

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: 2022/10/13

Branch: Mossel Bay, Main Branch | Monthly Recovery Contract

General | **Hire Item** | Non-Serial | Non-Rentals | Deposits | Payment | Detail View | Financial | Kit Group/Quote

Hire Num	Item Code	Item Desc	Tarif Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hou
<input checked="" type="checkbox"/>	2	ZGR00	Deposit - 500.00	0501001	0.00	0.00	N	On Rent	Deliver	0	0	0.00	0	0	0.00	3.00	0.00	0.0
<input checked="" type="checkbox"/>	3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	180.00	N	On Rent	Deliver	1	1	0.00	0	0	0.00	2.00	0.00	0.0
<input checked="" type="checkbox"/>	4	01004001	Single Toilet Unit, Blue Lo...	0501004	40.00	80.00	N	On Rent	Deliver	1	1	0.00	0	0	0.00	2.00	0.00	0.0
<input checked="" type="checkbox"/>	5	01004002	Single Toilet Unit, Blue Lo...	0501004	40.00	80.00	N	On Rent	Deliver	1	1	0.00	0	0	0.00	2.00	0.00	0.0

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

Reports to: Screen Print | POS Print to: Screen Print

Buttons: Save, Cancel, Refund Charge, Contract, Summary, Delivery Note, Return Note, Close

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.



Returning and Invoicing an Item

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.

Select Return Date

101 -- VIP Toilet Trailer, Blue Loo, 101

1 Date Out : 2022/10/11 13:08

2 Date In : 2022/10/13 09:22 Time Out - 03:46

Changeover (Swop Item)

Saturday Total	0.00	Hire Day Adjustment	4
Sunday Total	0.00	Subtract	<input checked="" type="radio"/>
Holiday Total	0.00	Add	<input type="radio"/>
Off-Hire Total	0.00	Adjustment Quantity	0.00
Hire Day Total	2.00	Adjusted Hire Day	0.00
Daily Rate	90.00	Adjustment Value	0.00



Returning and Invoicing an Item

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 Out - 03:46

Changeover (Swop Item)

Saturday Total	0.00
Sunday Total	0.00
Holiday Total	0.00
Off-Hire Total	0.00
Hire Day Total	2.00
Daily Rate	90.00

Hire Day Adjustment

Subtract 0

Add

Adjustment Quantity: 0.00

Adjusted Hire Day: 0.00

Adjustment Value: 0.00

Replacement Quantity: 5

Replacement @ Cost: 0.00

Repair Fee: 6 0.00

Late Return: 7

Charge Extra Fee @ 200.00

No Penalty for Late Return

Notes: 8

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

Contract Details

Contract Volume # 2
Customer Code : PE0002
Site Number : PE0002/001
Branch Mossel Bay, Main Branch

201 -- Single Toilet Unit, Blue Loo, 201
Date Out : 2022/10/11 13:13
Date In : 2022/10/13 09:33 Time Out - 03:40

Changeover (Swap Item)

Saturday Total	0.00	Hire Day Adjustment	
Sunday Total	0.00	Subtract	0
Holiday Total	0.00	Add	0
Off-Hire Total	0.00	Adjustment Quantity	0.00
Hire Day Total	2.00	Adjusted Hire Day	0.00
Daily Rate	40.00	Adjustment Value	0.00

Replacement Quantity 0
Replacement @ Cost - 50000.00 0.00
Repair Fee 0.00

Late Return

Notes

Accept

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.

Contract Details

Contract Volume # 2
Customer Code : PE0002
Site Number : PE0002/001
Branch Mossel Bay, Main Branch

202 -- Single Toilet Unit, Blue Loo, 202
Date Out : 2022/10/11 13:15
Date In : 2022/10/13 09:34 Time Out - 03:40

Changeover (Swap Item)

Saturday Total	0.00	Hire Day Adjustment	
Sunday Total	0.00	Subtract	0
Holiday Total	0.00	Add	0
Off-Hire Total	0.00	Adjustment Quantity	0.00
Hire Day Total	2.00	Adjusted Hire Day	0.00
Daily Rate	40.00	Adjustment Value	0.00

Replacement Quantity 0
Replacement @ Cost - 50000.00 0.00
Repair Fee 0.00

Late Return

Notes

Accept

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



Returning and Invoicing an Item

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: 2022/10/13

Branch: Mossel Bay, Main Branch **Monthly Recovery Contract.**

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl.	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hou
2	ZGR00...	Deposit - 500.00		0.00	0.00	N	Returned	Deliver	0	0	0	0.00	0	0	0.00	3.00	0.00	0.0
3	01001001	VIP Toilet Trailer, Blue Loo...	0501001	90.00	180.00	N	Returned	Deliver	1	0	0	0.00	0	0	0.00	2.00	0.00	0.0
4	01004001	Single Toilet Unit, Blue Lo...	0501004	40.00	80.00	N	Returned	Deliver	1	0	0	0.00	0	0	0.00	2.00	0.00	0.0
5	01004002	Single Toilet Unit, Blue Lo...	0501004	40.00	80.00	N	Returned	Deliver	1	0	0	0.00	0	0	0.00	2.00	0.00	0.0

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

Reports to: Screen Print POS Print to: Screen Print

Buttons: Edit, Credit Note, Refund Charge, Invoice (checked), Contract, Summary, Delivery Note, Return Note, Close

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.

TAX INVOICE

Date: 13 October 2022
Start Date: 11 October 2022
Invoice Number: 37000020
End Date:

Hyoame Excoets
44 Green Earth Street
Belville
Cape Town
8000

Tel: 044 123456
Fax:
Email:
VAT No: 123456789

Peterson Construction PE0002
98 Construction Street
Moss Industria
Mossel Bay
6500

Contract Number: 2
Contract Volume Number: 2
Order Number:
Customer Contact #: 044 693 123456
Cellular #: 082 12345678
Customer ID #:
Billing Interval: Month End

Site: Apartment Construction
VAT No: 123456789

Hire Items

Code	Hire #	Description	QTY	HD	Hour	Rate	Incl
01001001	3	VIP Toilet Trailer, Blue Loo, 101	1	2.00	0.00	90.00	180.00
		Out 11 October 2022 - 13:08:10 In 13 October 2022 - 09:22:02					
01004001	4	Single Toilet Unit, Blue Loo, 201	1	2.00	0.00	40.00	80.00
		Out 11 October 2022 - 13:13:47 In 13 October 2022 - 09:33:18					
01004002	5	Single Toilet Unit, Blue Loo, 202	1	2.00	0.00	40.00	80.00
		Out 11 October 2022 - 13:15:21 In 13 October 2022 - 09:34:54					

Non Rentals

Code	Description	Qty	Tax	Incl
SER001	Service - VIP Toilet Trailer	2.00	R10.43	R80.00
AIR002	Air Freshener - Lavender 100ml	2.00	R5.22	R40.00
LHS001	Liquid Hand Soap - 250ml	3.00	R5.53	R45.00
SAN001	Sanitizer - toilet block	3.00	R5.87	R45.00
TP R001	Toilet Paper per Roll	22.00	R7.17	R55.00
SER005	Service - Single Toilet Unit	4.00	R18.18	R139.38
AIR003	Air Freshener - Orange Blossom 100ml	2.00	R5.22	R40.00
AIR005	Air Freshener - Ocean Fresh 100ml	1.00	R2.61	R20.00
WPB001	Waste Bin	1.00	R32.61	R250.00
	Item was removed, and had to be replaced			

Page: 1

Tax Total: R136.57
Excl Total: R917.81
Incl Total: R1 054.38
Discount: R0.00



Returning and Invoicing an Item

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

09 Oct 2022 Sun 10 Oct 2022 Mon 14 Oct 2022 Fri 15 Oct 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

Item Code	09 Oct 2022	10 Oct 2022	14 Oct 2022	15 Oct 2022	16 Oct 2022	17 Oct 2022	18 Oct 2022	19 Oct 2022	20 Oct 2022	21 Oct 2022
01001001			3 Peterson Construction							
01001002			7 Peterson Construction							
01001003										
01001004										
01002001										
01002002										
01003001										
01003002										
01003003										
01003004										
01004001			4 Peterson Construction							
01004002			5 Peterson Construction							
01004003			8 Peterson Construction							
01004004			10 Peterson Construction							
02001001										

View Items by:
 Code Available
 Plant No On Rent
 Transfer Maintenance

Contract 2 Vol 2
20221011

98 Construction Street
Moss Induxtria
Mossel Bay
6500
peterson@construct.com

Mobile Phone: 082 12345678
Fax:
Telephone: 044 693 123456

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

Credit Note: 0.00
Contract Dep Paid: 500.00
Contract Invoice Total: 1054.38
Contract Receipt Total: 500.00
Contract Dep Forfeit: 0.00
Contract Dep Refund: 0.00
Contract Balance: 554.38

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.



Novotel®

Ablution Hire

12

Account Payments



Restrooms





Account Payments

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: 2022/10/13

Branch: Mossel Bay, Main Branch **Monthly Recovery Contract**

Code	Description	Dur	Qty	Tax	Inclusive
01001001	VIP Toilet Trailer, Blue Loo, 101	2	1	23.48	180.00
01004001	Single Toilet Unit, Blue Loo, 201	2	1	10.43	80.00
01004002	Single Toilet Unit, Blue Loo, 202	2	1	9.82	80.00
-	Additional Costs			92.84	714.38
-	Payments Made			0	-500.00

DEPOSIT PAID 500.00 **CREDIT NOTE** 0.00

INVOICE TOTAL 1054.38 **C N REFUND** 0.00

RECEIPT TOTAL 500.00 **Recalculate Totals**

DEPOSIT REFUND 0.00 **Refund Deposit**

DEPOSIT FORFEIT 0.00 **Refund Due**

PAYMENT DUE 554.38 **Contract Payment** ✓

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.

Contract Payments

Selected Item(s):

Code	Description	Dur	Qty	Tax	Inclusive
-	Deposit Applied			0.00	500.00
01001...	VIP Toilet Trailer, Blue ...	2	1	23.48	180.00
01004...	Single Toilet Unit, Blue ...	2	1	10.43	80.00
01004...	Single Toilet Unit, Blue ...	2	1	9.82	80.00
SER001	Service - VIP Toilet Trai...	0	2	10.43	80.00
AIR002	Air Freshener - Lavend...	0	2	5.22	40.00
LHS001	Liquid Hand Soap - 250...	0	3	5.53	45.00
SAN001	Sanitizer - toilet block	0	3	5.87	45.00
TPR001	Toilet Paper per Roll	0	22	7.17	55.00
SER005	Service - Single Toilet ...	0	4	18.18	133.38
AIR003	Air Freshener - Orange ...	0	2	5.22	40.00
AIR005	Air Freshener - Ocean F...	0	1	2.61	20.00
WPB0...	Waste Bin	0	1	32.61	250.00
-	Item was removed, and...				
-	Payments Made			0	500.00

History:

- Hire Number
- Contract Vol Number
- Contract Vol #: 2
- Customer Description: PE0002 - Peterson Construction

Payment Type: Cash

Payment Date: 2022/10/13

Status Returned:

Payment Received: 0.00

Change: 0.00

PAYMENT DUE 554.38

User: Danny Shift #: SFT00002

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

Contract Payments

Selected Item(s):

Code	Description	Dur	Qty	Tax	Inclusive
-	Deposit Applied			0.00	500.00
01001...	VIP Toilet Trailer, Blue ...	2	1	23.48	180.00
01004...	Single Toilet Unit, Blue ...	2	1	10.43	80.00
01004...	Single Toilet Unit, Blue ...	2	1	9.82	80.00
SER001	Service - VIP Toilet Trai...	0	2	10.43	80.00
AIK002	Air Freshener - Lavend...	0	2	5.22	40.00
LHS001	Liquid Hand Soap - 250...	0	3	5.53	45.00
SAN001	Sanitizer - toilet block	0	3	5.87	45.00
TPR001	Toilet Paper per Roll	0	22	7.17	55.00
SER005	Service - Single Toilet ...	0	4	18.18	139.38
AIK003	Air Freshener - Orange ...	0	2	5.22	40.00
AIK005	Air Freshener - Ocean F...	0	1	2.61	20.00
WPB0...	Waste Bin	0	1	32.61	250.00
-	Item was removed, and...				
-	Payments Made			0	500.00

History:
 On File
 3 Month
 All

Hire Number
Contract Vol Number
 Contract Vol #: 2
 Customer Description: PE0002 - Peterson Construction

Payment Type:
 Credit Card
 Payment Date: 2022/10/13
 Credit Card Number: 987456321
 Credit Card Type: VISA

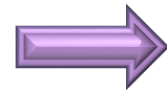
Status Returned:
 Payment Received: **554.38**
 Change: 0.00

PAYMENT DUE
554.38

Print to: Screen Print
 User: Danny Shift #: SFT00002
 <F2> - Accept
 Close

The User will select the payment method used by the Customer, select the date upon which the payment was received, and double check that the 'Payment Received' amount corresponds with the amount received from the Customer before clicking 'Accept' to process the payment.

The receipt is displayed as follows:



Receipt : REC00004
 Zoom 100%

Hygiene Experts
 44 Green Earth Street
 Bellville
 Cape Town
 8000
 Tel : 044 123456
 Fax :
 VAT :123456789

RECEIPT

Cust Description : Peterson Construction
 Cust Code : PE0002
 Contract Vol : 2
 Payment Type : Credit Card

Payment Due : 554.38
 Payment Received : 554.38
 Change : 0.00

Staff member : Danny
 Payment Date : 2022/10/13
 Print Date : 2022/10/13
 Time : 10:07:24
 Shift Number : SFT00002
 Receipt Number : REC00004

Thank You.



Account Payments

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: 2022/10/13

Branch: Mossel Bay, Main Branch Monthly Recovery Contract:

General Hire Item Non-Serial Non-Rentals Deposits **Payment** Detail View Financial Kit Group/Quote

Code	Description	Dur	Qty	Tax	Inclusive
01001001	VIP Toilet Trailer, Blue Loo, 101	2	1	23.48	180.00
01004001	Single Toilet Unit, Blue Loo, 201	2	1	10.43	80.00
01004002	Single Toilet Unit, Blue Loo, 202	2	1	9.82	80.00
.	Additional Costs			92.84	714.38
.	Payments Made			0	-1054.38

DEPOSIT PAID **CREDIT NOTE**

500.00 0.00

INVOICE TOTAL **C N REFUND**

1054.38 0.00

RECEIPT TOTAL

1054.38 Recalculate Totals

DEPOSIT REFUND

0.00 Refund Deposit

DEPOSIT FORFEIT

0.00 Refund Due

PAYMENT DUE **Contract Payment**

0.00

Apply Deposit Reports to: Screen Print POS Print to: Screen Print

Edit Credit Note Refund Charge Invoice Contract Summary Delivery Note Return Note

The payment is now captured, and the payment due amount is displayed as zero since the outstanding balance was settled in full.

The 'Financial' tab displays the receipt number, amount and the date and time the payment was processed.

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: 2022/10/13

Branch: Mossel Bay, Main Branch Monthly Recovery Contract:

General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View **Financial** Kit Group/Quote

Document Num	Amount	Transaction	Time Stamp
REC00003	500.00	Deposit	2022/10/11 12:50:49
REC00004	554.38	Payment	2022/10/13 10:07:23

Apply Deposit Reports to: Screen Print POS Print to: Screen Print

Edit Credit Note Refund Charge Invoice Contract Summary Delivery Note Return Note Close



Account Payments

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

10 Oct 2022 Mon 11 Oct 2022 Tue 12 Oct 2022 Wed 13 Oct 2022 Thu 17 Oct 2022 Mon 18 Oct 2022 Tue 19 Oct 2022 Wed 20 Oct 2022 Thu 21 Oct 2022 Fri 22 Oct 2022 Sat

Peterson Construction Res No: 3
Status: Fully Paid
Customer Invoice: GI000002

Item Code	Description	10 Oct 2022	11 Oct 2022	12 Oct 2022	13 Oct 2022	17 Oct 2022	18 Oct 2022	19 Oct 2022	20 Oct 2022	21 Oct 2022	22 Oct 2022
01001001	3 Peterson Construction										
01001002	7 Peterson Construction										
01001003											
01001004											
01002001											
01002002											
01003001											
01003002											
01003003											
01003004											
01004001	4 Peterson Construction										
01004002	5 Peterson Construction										
01004003	8 Peterson Construction										
01004004	10 Peterson Construction										
02001001											

View Items by:
 Code Available
 Plant No On Rent
 Transfer Maintenance

Contract 2 Vol 2
20221011

98 Construction Street
Moss Induxtria
Mossel Bay
6500
peterson@construct.com

Mobile Phone 082 12345678
 Fax
 Telephone 044 693 123456
 User Defined Field 1
 User Defined Field 2
 User Defined Field 3
 User Defined Field 4
 User Defined Field 5

Credit Note 0.00
 Contract Dep Paid 500.00
 Contract Invoice Total 1054.38
 Contract Receipt Total 1054.38
 Contract Dep Forfeit 0.00
 Contract Dep Refund 0.00
 Contract Balance 0.00

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



Novtel[®] Ablution Hire



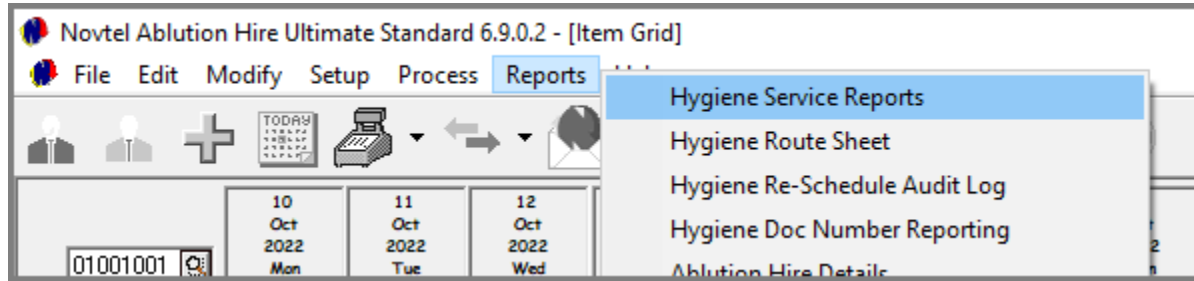
13

Reports

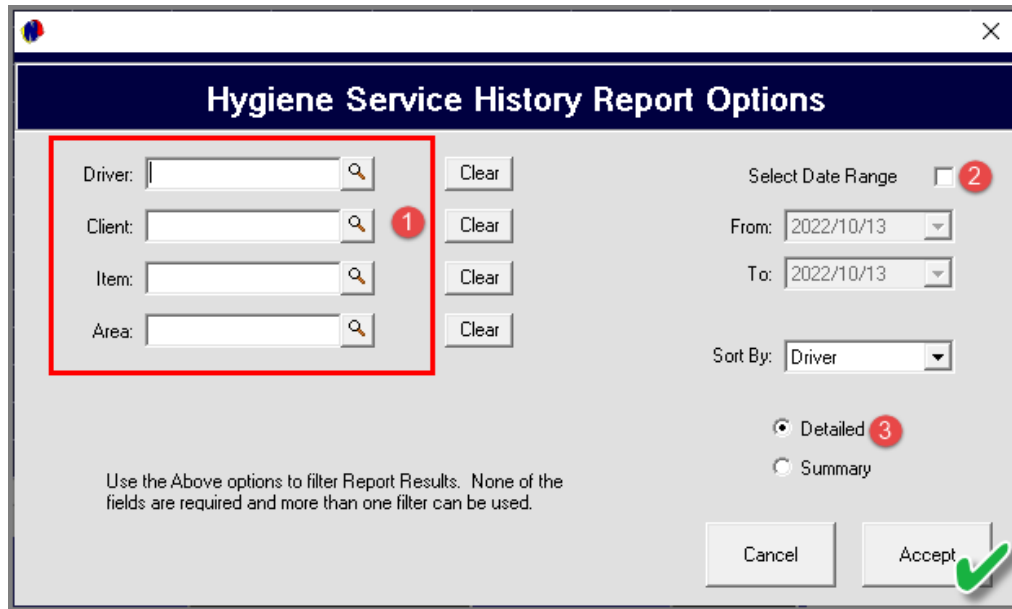




The Hygiene Service Report



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



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

Hygiene Service Report

Time and date report was printed: 13 October 2022 10:20:00

ITEM	CLIENT	SITE	AREA	DATE	COST
DRIVER: Duncan Ross					
01004002 - Single Toilet Unit, Blue Loo, 202	PE0002 - Peterson Construction	PE0002/001	Mossel Bay Business District	12 October 2022	34.99
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

Hygiene Service History Report Options

Driver:

Client:

Item:

Area:

Select Date Range

From: 2022/10/11

To: 2022/10/13

Sort By: Driver

Detailed

Summary

Use the Above options to filter Report Results. None of the fields are required and more than one filter can be used.

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

Hygiene Service Report

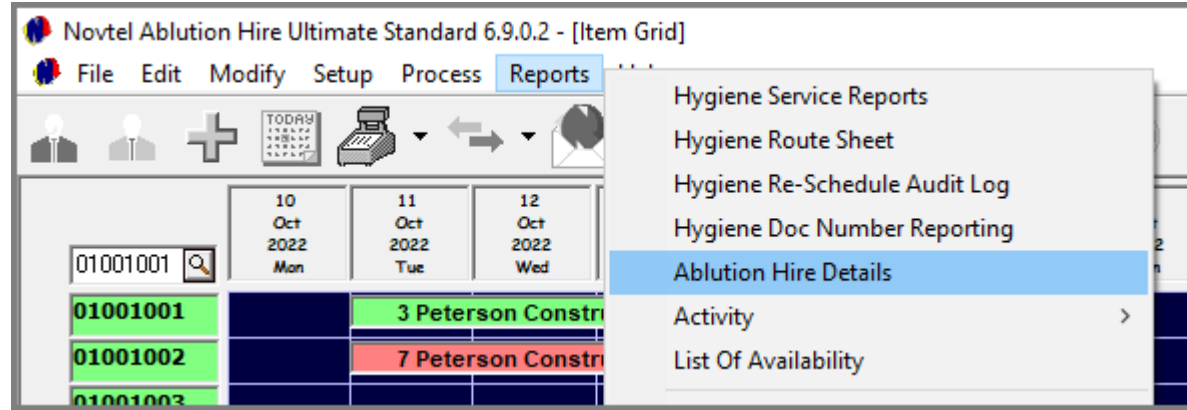
Time Period of Report: 11 October 2022 to 13 October 2022

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

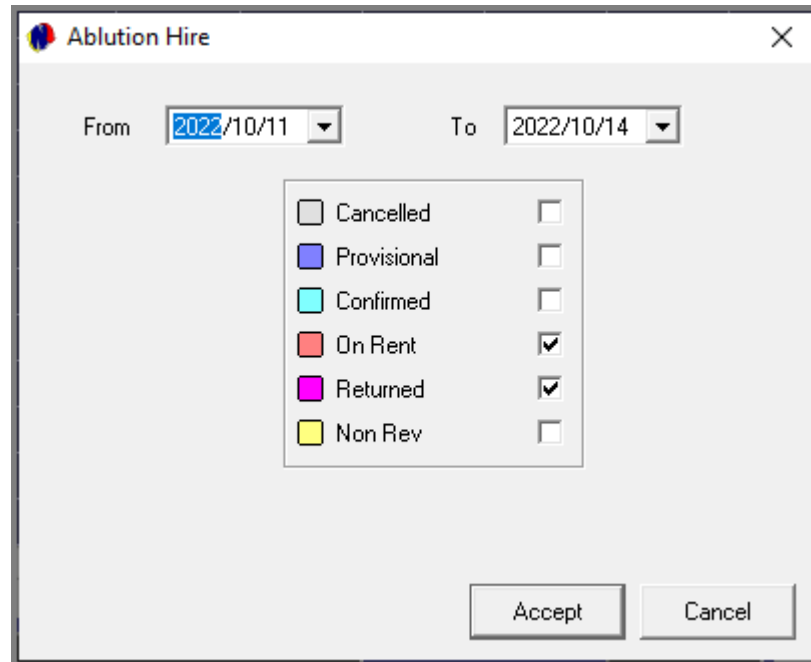


The Ablution Hire Report



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

- ✓ Contracts for the selected period
- ✓ 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

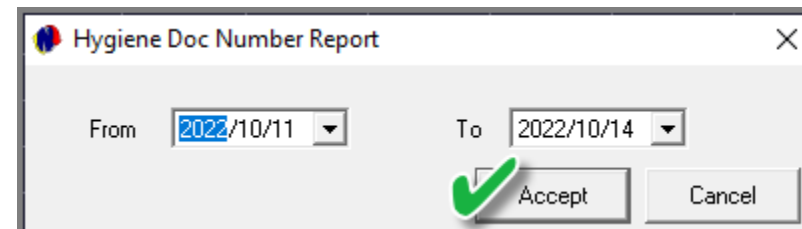
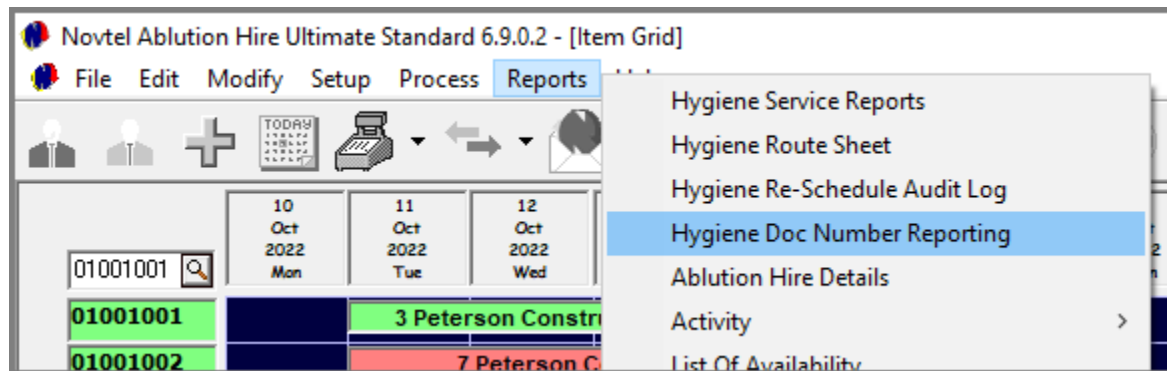
PRINTED DATE: 13 OCTOBER 2022 TIME: 10:32:32

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
- ✓ 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
- ✓ 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 AGENT	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,	SI000005	4	
204	13 October 2022	PE0002 - Peterson Construction	Duncan Ross	35	MECO	56 Yellow Road, Monte Cristo, 6533,	SI000003	4	
203	13 October 2022	PE0002 - Peterson Construction	James Howard	35	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	SI000006	3	
102	13 October 2022	PE0002 - Peterson Construction	James Howard	40	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	SI000006	3	
203	13 October 2022	PE0002 - Peterson Construction	Duncan Ross	35	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	SI000004	3	
102	13 October 2022	PE0002 - Peterson Construction	Duncan Ross	40	VRBY	Stevens Close, Voorbaai, Mossel Bay, 6500,	SI000004	3	



The Hygiene Re-Schedule Audit Log Report

Hygiene Maintenance

Select Area : Branch Service Agent :

Item Code	Description	Hire #	Area	Serv Due Date	Instructions	Customer	Delivery Address
<input type="checkbox"/>	01004004	Single Toilet Unit, Blue Loo, 204	10	Monte Cristo	2022/10/15		56 Yellow Road, Monte...
<input type="checkbox"/>	01001002	VIP Toilet Trailer, Blue Loo, 102	7	Voorbaai	2022/10/15		Stevens Close, Voorba...
<input checked="" type="checkbox"/>	01004003	Single Toilet Unit, Blue Loo, 203	8	Voorbaai	2022/10/15		Stevens Close, Voorba...

1. >> Add Instructions Select All Deselect all Display Option
View by Site Search Filter
2. >> Site Sequence 2022/10/14 Re-Schedule Item View by Item Code Show All
3. >> Print Service Cancel Service Reprint Transaction Specific Day

Print to :

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.

Novtel Equipment Hire

Are you sure you want to Re-Schedule Selected Items to Date: 14 October 2022

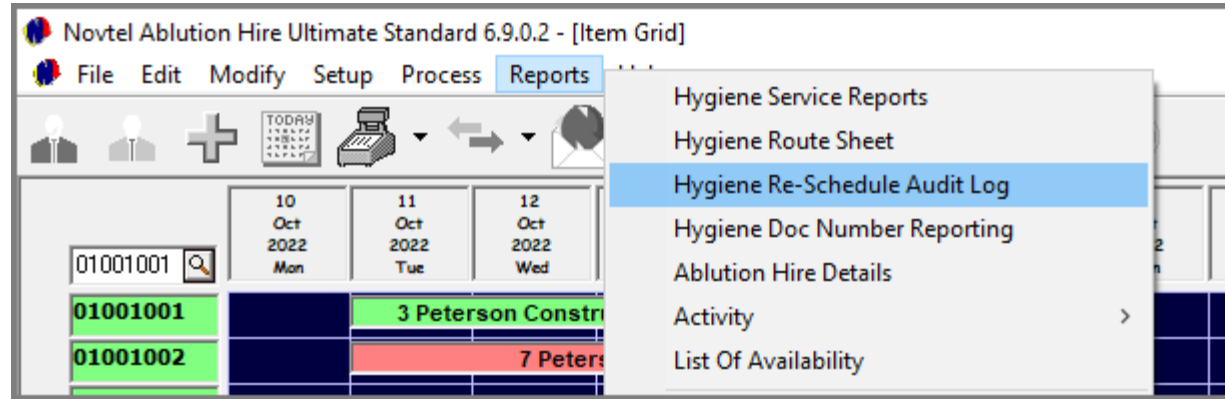
Yes No

Novtel Equipment Hire

Reason for Re-scheduling Item: 01004003

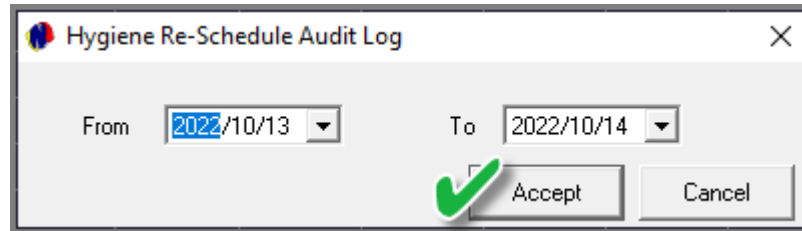


The Hygiene Re-Schedule Audit Log Report



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 FROM	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.



Novtel[®]

Ablution Hire

14

Setup Procedures



Restrooms





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

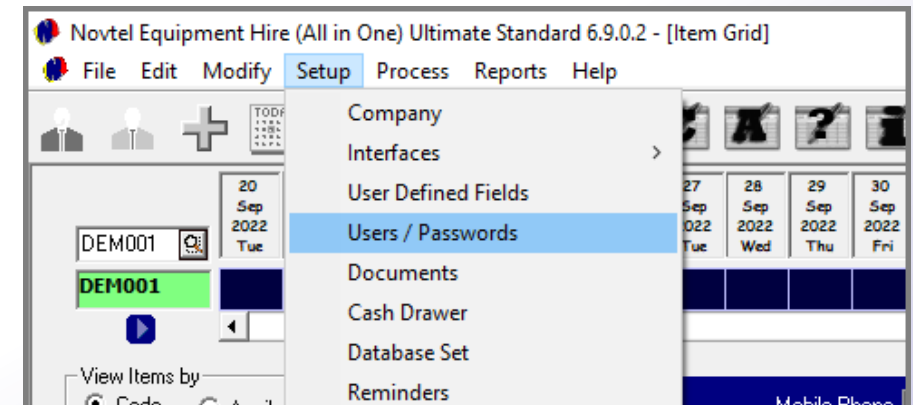
We recommend that your Company's Accountant, or person with extensive knowledge of the financial system be involved in the setup of the GL Accounts; Inventory Groups; Entry Types, etc. These must be linked to Novtel to ensure that transactions are posted correctly.

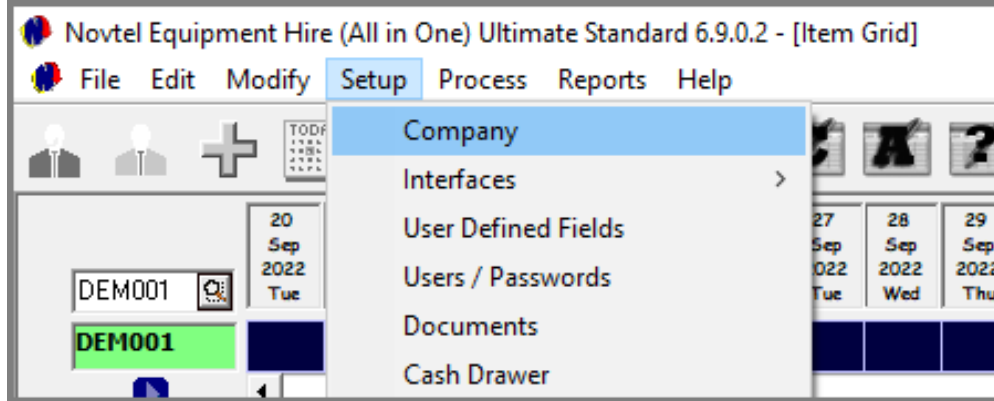
❑ USERS AND PASSWORDS

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.





COMPANY SETUP

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

Company Setup

Company Details | General | Financial | Access Control | Preferences | Images

Name: Hygiene Experts
 Tel: 044 123456
 Fax:
 Cell: 082 123456
 Company Email:
 Address: 44 Green Earth Street
 Bellville
 Cape Town
 8000
 Email Address: (for this computer) experts@hygiene.co.za
 Computer Location: Admin Office
 Use Branch Address and contact details

This Database Manages: Ablution Hire
 Novtel Default (All in One)
 Equipment Hire
 Plant Hire
 Event Hire
 Suit Hire
 Container Hire
 Ablution Hire
 Gas Cylinder Hire

Accept Cancel

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

Company Details | **General** | Financial | Access Control | Preferences | Images

Automatic Refresh Interval: 60 Seconds
 Enter 0 to disable automatic refresh

Number of rows on Grid: 15
 Number of columns on Grid: 35

Activate Monthly Billing: Yes No
 Activate Access Control: Yes No
 Activate Recurring Maintenance: Yes No
 Force Agent Commission: Yes No

Default Return Time: 14:00:00
 Minimum Password Length (0 = No check): 0

Force use of return time:
 Return Cut-off (Half/ Full day) hour/s (30 Minutes = .3): 0
 Default Half Day Value (If half day = 60% enter 0.6): 0
 Short Rent Cut-off in hour/s (30 Minutes = .3): 0
 Short Rent Value (If 55% enter 0.55): 0

Require Supervisor Password for Hire Item Remove:
 Allow - Cancel Hire Items with outstanding Balance:
 Allow Additional Costs Posting only for On Rent Status:
 Allow changing Status to On Rent for Future rentals:
 Activate Novtel Online Bookings:
 Activate Demo Mode:
 Override Credit Limit Check:
 Return Deposit Container only if selected:
 Allow only Permanent Branch transfers:
 Allow Work Order creation at Branch level:

Allow Rentals to overlap by: 1 day/s
 Allow Grace Period of: 2 hour/s
 Allow Backdated Return of: 0 day/s
 Force Plant No. to Cost Code:
 Force Customer Code Adjective (Branches):

Increment Hire Days on Sunday (Checked = Charge)
 Activate Sundays on Item Level
 Increment Hire Days on Saturday (Checked = Charge)
 Charge Half Day on Saturday (Checked = Charge)
 Activate Saturdays on Item Level
 Increment Hire Days on Public Holidays (Checked = Charge)
 Activate Holidays on Item Level
 Activate Monthly Fixed Rates
 Activate Weekly Rates
 Activate Weekly Rates on Item Level

Setup Holidays

Cross Hire Branch: No Branch
 Cash Customer Category: 00 - No category
 Force use of Customer Email Recorder:
 Print Hygiene Slips:
 Allow Contract Discount:
 Allow Item Remove (More than one day selected):
 Allow Multiple off-hire Days:

Setup Company - General Tab

In this tab, a host of settings can be entered and selected to determine how your 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.

Company Setup

Company Details | General | **Financial** | Access Control | Preferences | Images

VAT / GST / Sales Tax
 Use Tax: Yes No
 Tax Number: 123456789
 Default Tax Type: 1 - Vat - Standard rated (15%)

Service Charge
 Tax on Service Charge:
 Charge Code:
 Service Charge: 0 %
 Invoiced Service Charge Code - Link to Charge Code:

Update Cost/Selling Prices
 Round Cost/Selling Price to next: 0
 Example: 0.05 (0.33 to 0.35) 0.50 (0.33 to 0.50)
 Default Markup Percentage: 0

Update Customer Invoices
 Next Invoice Number Format (AANNNNNN): IN000001
 Invoice Date Method: Update Date
 Invoice Adjective: GI

Update Customer Credit Notes
 Next Credit Note Number Format (AANNNNNN): CN000001

Update Supplier Invoices
 Next Invoice Number (AANNNNNN): S1000001
 Invoice Date Method: Update Date

Down Currency to be Displayed on Documents:
 Foreign Currency to be Displayed on Documents:
 1 ____ = ??? ____ [0]

Force Use of Suggested Deposit:
 Allow Negative Discount if Applicable

Settlement Discount
 Setup Settlement Discount Scale
 Only Apply Settlement Discount for current month if all previous outstanding amounts have been paid in full.
 Apply Settlement Discount for current month, with previous outstanding amounts payable in full.

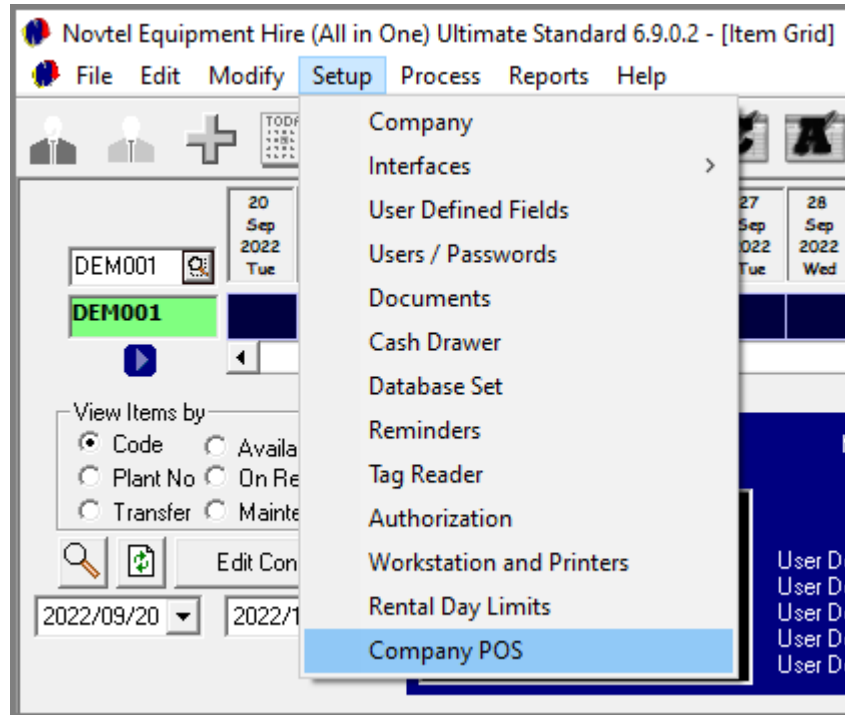
Charge Code:

*Settlement Discount to be used with Email Module. When Statement is sent to Customer, the settlement Discount Countdown Begins for that Customer

Accept Cancel

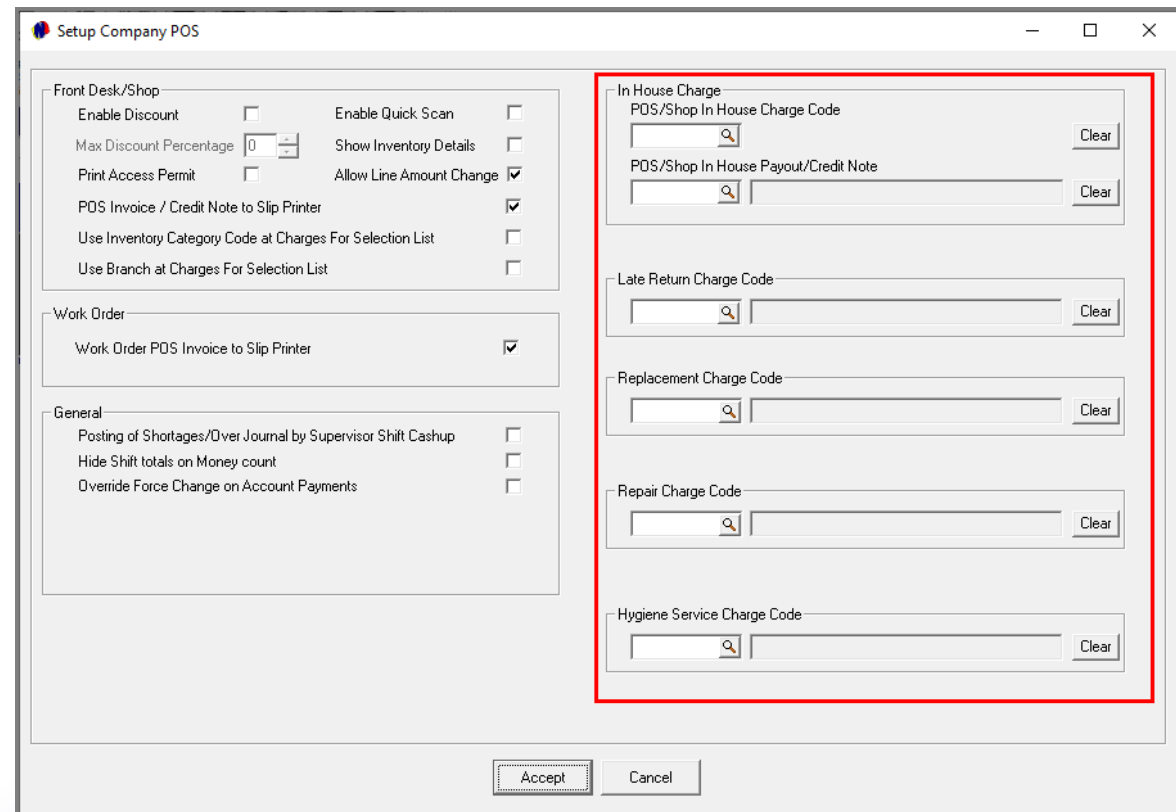
Setup Company - Financial Tab

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.



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.

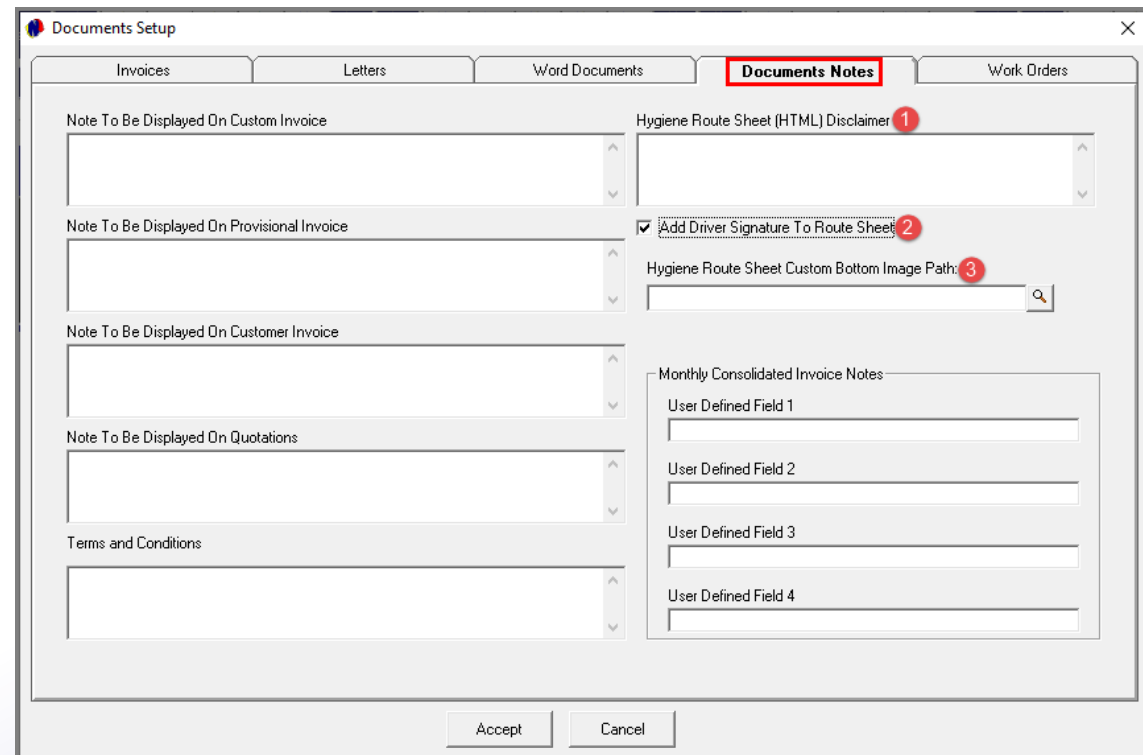
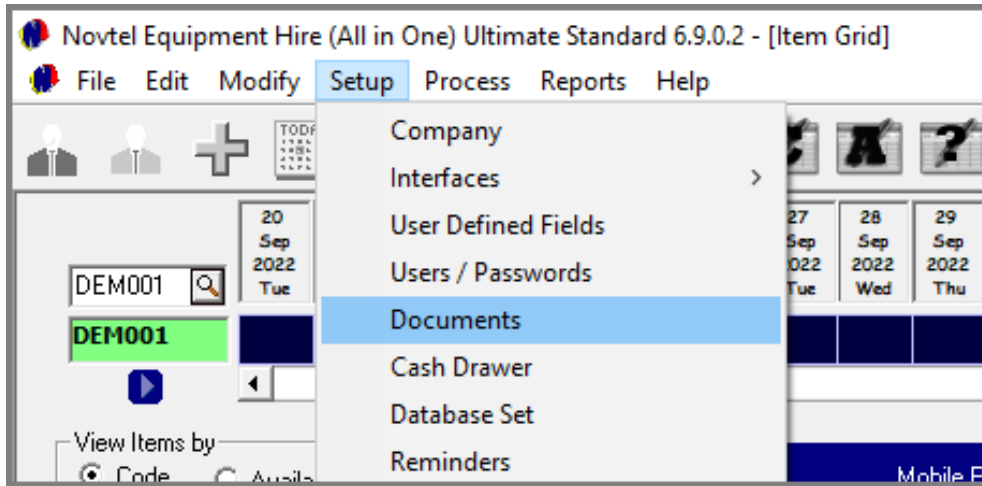




DOCUMENT NOTES SETUP

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





BRANCHES SETUP

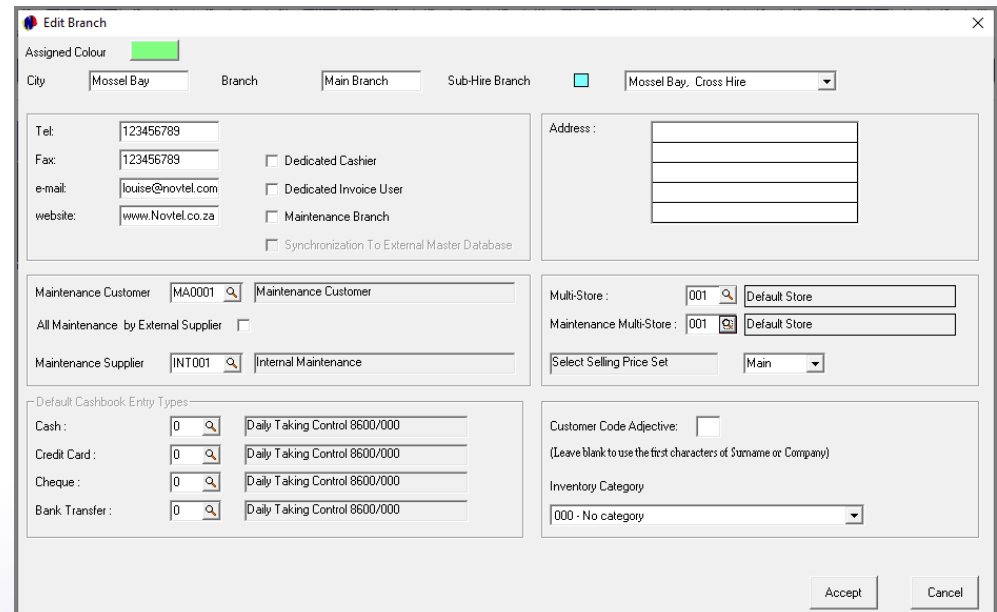
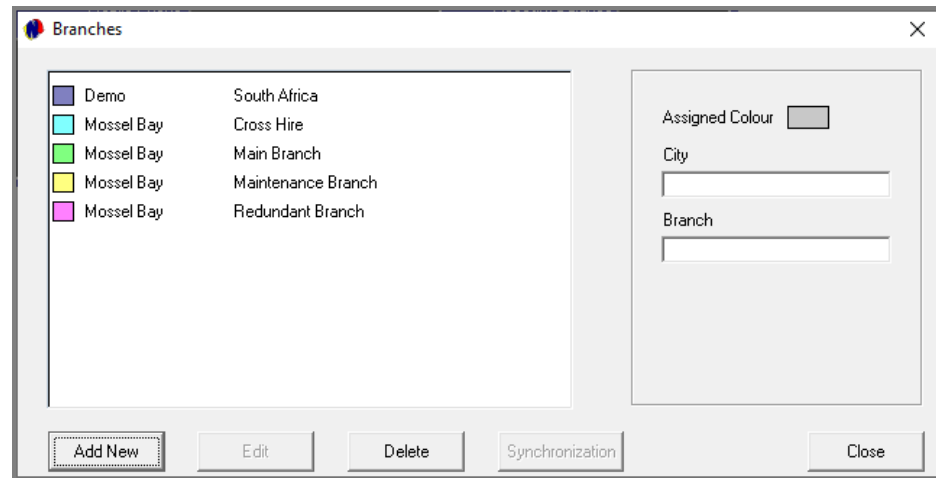
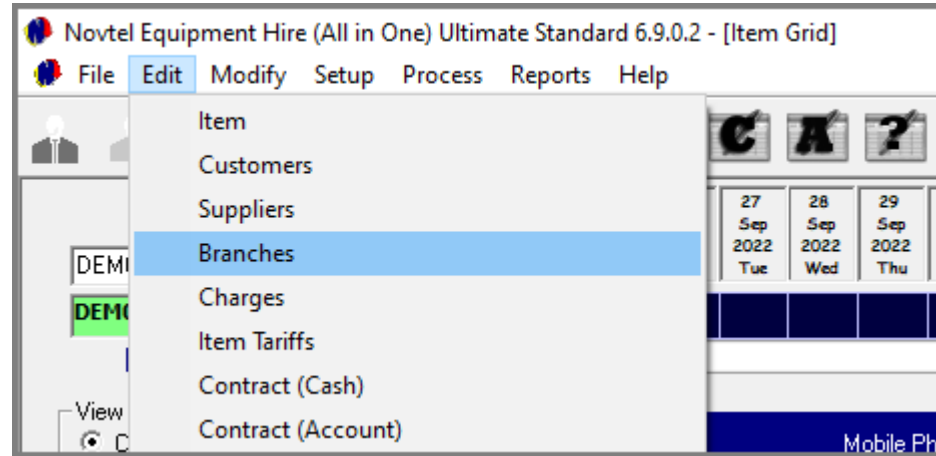
Multiple Branches can be set up in the Novtel system. A Branch can refer to different towns or cities; countries; a Maintenance Branch to which items can be transferred and serviced; repaired or discarded, and sub-hire branches where items can be sourced from and sub-rented by your company.

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.





☐ 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.

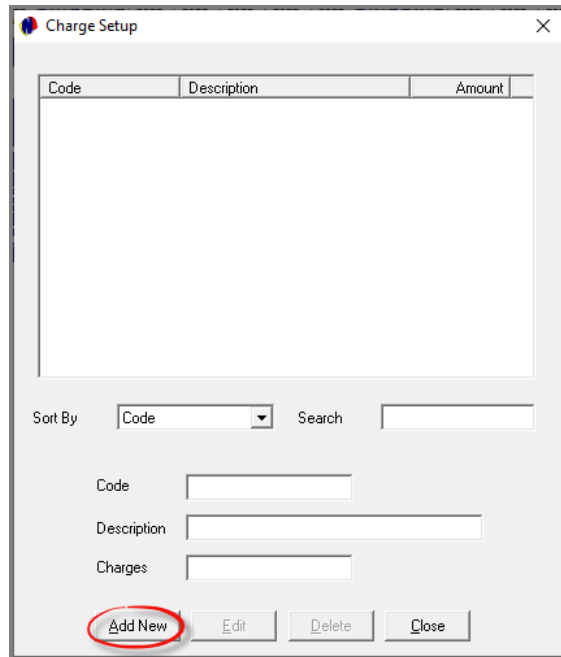
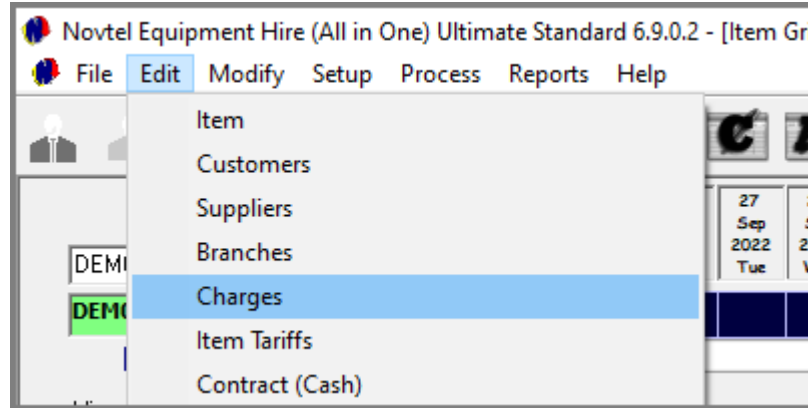
Examples of '**Hygiene Fixed Items**' may include the following:

- ✓ 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



Other applicable charges may 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

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

The screenshot shows a software window titled "Add New Charge" with a close button (X) in the top right corner. The form contains several input fields and checkboxes, each with a red circular callout number:

- 1** Code: LHS001
- 2** Description: Liquid Hand Soap - 250ml
- 3** Branch: Mossel Bay, Main Branch (selected in a dropdown menu)
- 4** Create Item In Pastel
- 5** Display On Invoice
- 6** Physical Item
- 7** Serial Number Item

Other fields include Barcode and External Reference, which are currently empty.

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.



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.



Add New Charge

Code: LHS001 Create Item In Pastel
Description: Liquid Hand Soap - 250ml Display On Invoice
Barcode: Physical Item

Import Inventory Item

Code: LHS001
Description: Liquid Hand Soap - 250ml
Inventory Group:
Excl Selling Price: 13.16
 Physical Item Service Item

Multi-Store Select
All Multi-Stores
Selected Multi-Stores

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 Item

Code: LHS001
Description: Liquid Hand Soap - 250ml

Inventory Group: 002 - Inventory Goods

Excl Selling Price: 13.16

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

Multi-Store Select
All Multi-Stores
Selected Multi-Stores

Accept Cancel



Charge Setup

Code	Description	Amount
07001001	VIP Toilet Trailer, Blue Loo, 101	100.00
07001002	VIP Toilet Trailer, Blue Loo, 102	100.00
07001003	VIP Toilet Trailer, Blue Loo, 103	100.00
07001004	VIP Toilet Trailer, Blue Loo, 104	100.00
07001005	VIP Toilet Trailer, Blue Loo, 105	100.00
07002001	Paraplegic Toilet Trailer, Blue Lo...	200.00
07002002	Paraplegic Toilet Trailer, Blue Lo...	200.00
07002003	Paraplegic Toilet Trailer, Blue Lo...	200.00
07002004	Paraplegic Toilet Trailer, Blue Lo...	200.00
07002005	Paraplegic Toilet Trailer, Blue Lo...	200.00
07003001	12 Toilet Trailer, Blue Loo, 301	300.00
07003002	12 Toilet Trailer, Blue Loo, 302	300.00
07003003	12 Toilet Trailer, Blue Loo, 303	300.00
07004001	Single Toilet Unit, Blue Loo, 401	50.00
07004002	Single Toilet Unit, Blue Loo, 402	50.00
07004003	Single Toilet Unit, Blue Loo, 403	50.00
07004004	Single Toilet Unit, Blue Loo, 404	50.00

Sort By: Code Search:

Code:

Description:

Charges:

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'.

Novtel Equipment Hire (All in One) Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports

DEM001

View Items by: Code Available Plant No On Rent Transfer Maintenance

2022/09/20 2022/10/24

- Hygiene Service Reports
- Hygiene Route Sheet
- Hygiene Re-Schedule Audit Log
- Hygiene Doc Number Reporting
- Ablution Hire Details
- Activity
- List Of Availability
- Rental Statistics
- Usage Report
- Utilization
- Audit Log By User
- Comments & Remarks
- List
- List Item Links
- Contracts NOT Invoiced
- Invoiced Contracts
- Deposits
- Month-End
- Income To...

- Item Tariffs
- Items
- Kit Item Groups
- Charges
- Charges not linked to Pastel
- Charge Customer Prices (Price Matrices)
- Charge Customer Category Prices (Price Matrices)

Account Balance
Deposit Paid Total
Invoice Total
Receipt Total
Deposit Forfeit



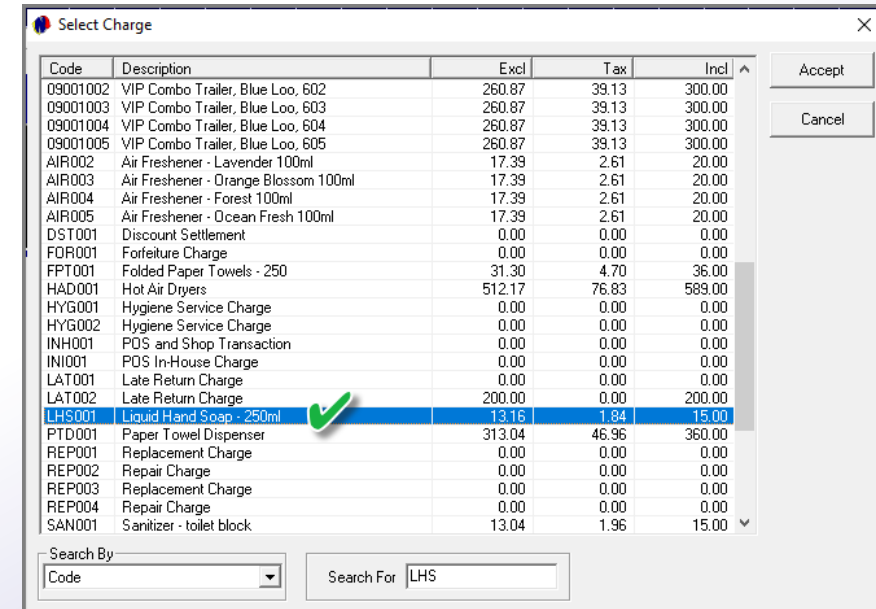
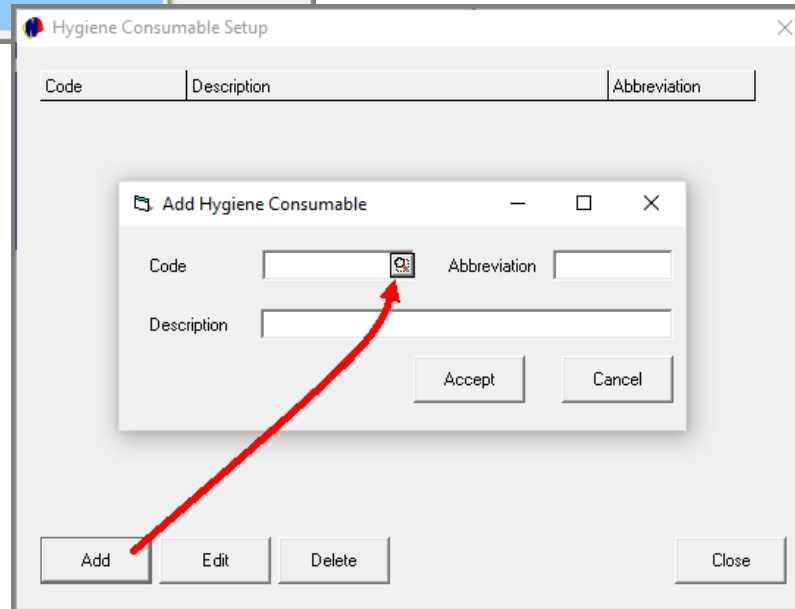
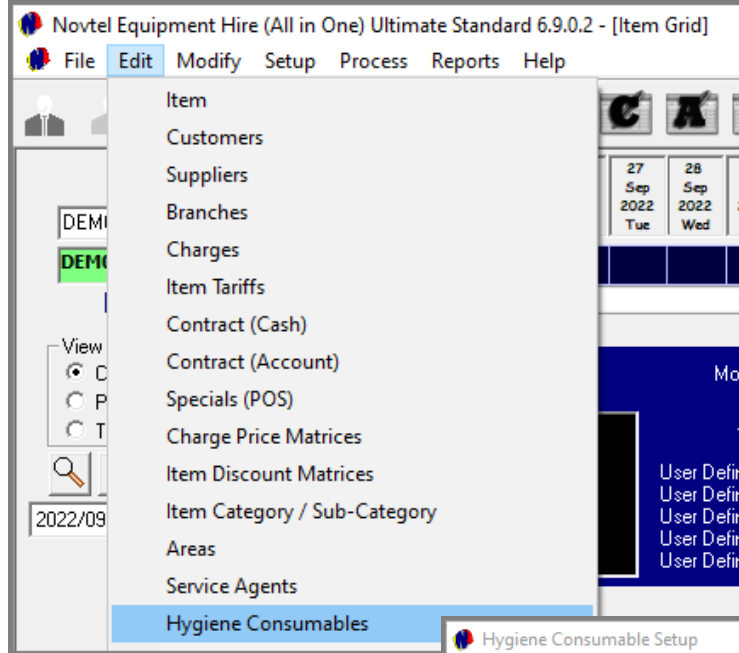
❑ HYGIENE CONSUMABLES

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 pre-created 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.





Add Hygiene Consumable

Code: LHS001 Abbreviation: SOAP

Description: Liquid Hand Soap - 250ml

Accept Cancel

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 Maintenance

Select Area: All Areas Branch: Mossel Bay, Main Service Agent:

Service Due **On Service** Update Service Next Service Service History

Description	OS	Due Date	AF Va...	AF La...	AF Dr...	AF Fo...	AF D...	Towels	Soap	SAN	Tpa

Select All Deselect all Display Option: View by Site (selected), View by Item Code Search Filter: Show Details, Show Consumables (selected), Specific Service Agent

Print to: Screen Print Close

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



Hygiene Consumable Setup

Code	Description	Abbreviation
LHS001	Liquid Hand Soap - 250ml	SOAP

Add Edit 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 Consumable Setup

Code	Description	Abbreviation
LHS001	Liquid Hand Soap - 250ml	SOAP
AIR002	Air Freshener - Lavender 100ml	AF Lavender
AIR003	Air Freshener - Orange Blossom 100ml	AF Orange
AIR005	Air Freshener - Ocean Fresh 100ml	AF Ocean
SAN001	Sanitizer - toilet block	T Block
TPR001	Toilet Paper per Roll	T Paper

Add Edit Delete Close

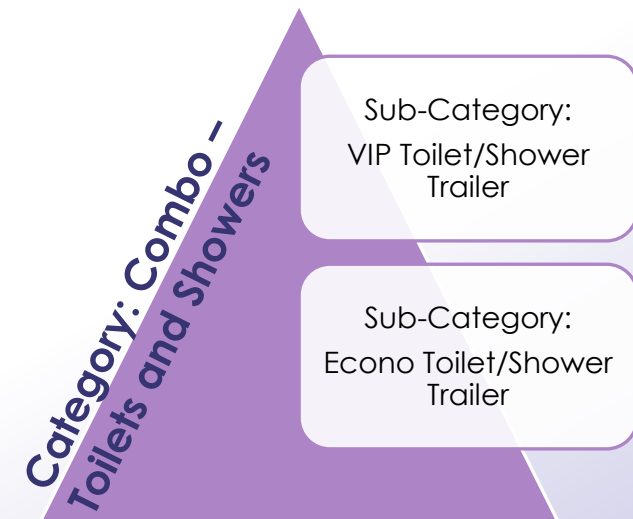
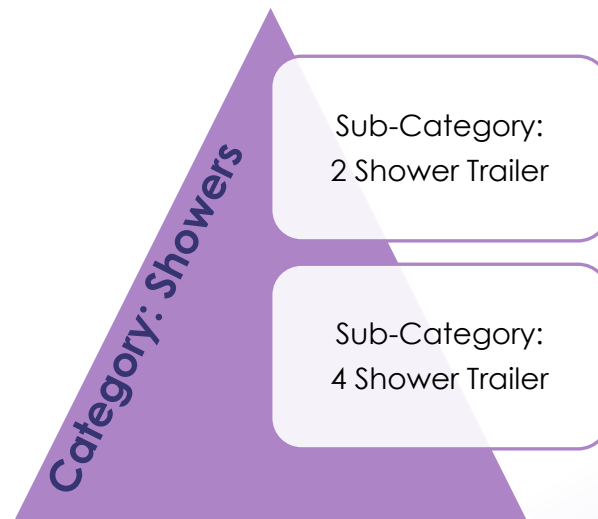
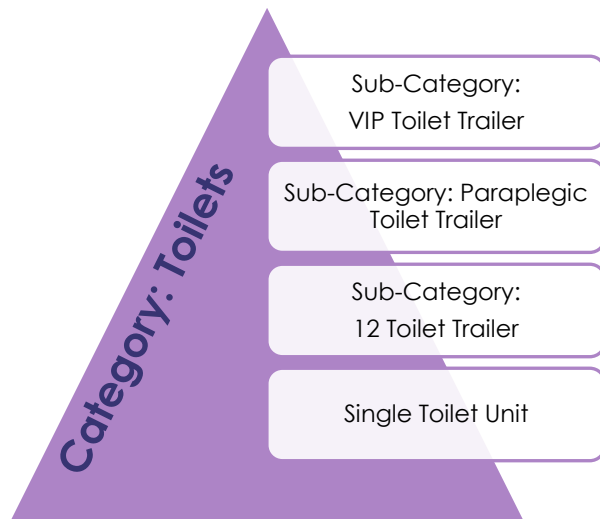


ITEM CATEGORIES AND SUB-CATEGORIES

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.

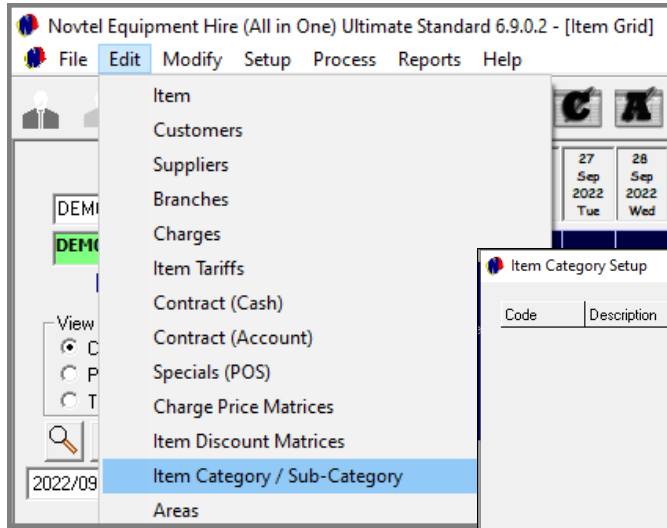
Examples of Item Categories and Sub-Categories may include the following:



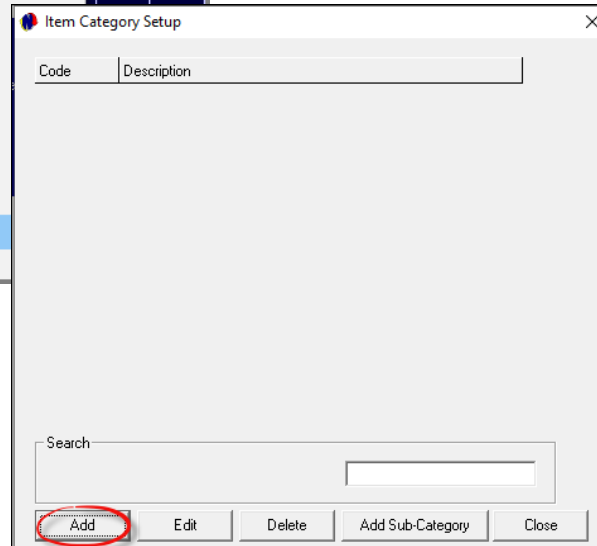


Setup Procedures

Item Categories and Sub-Categories

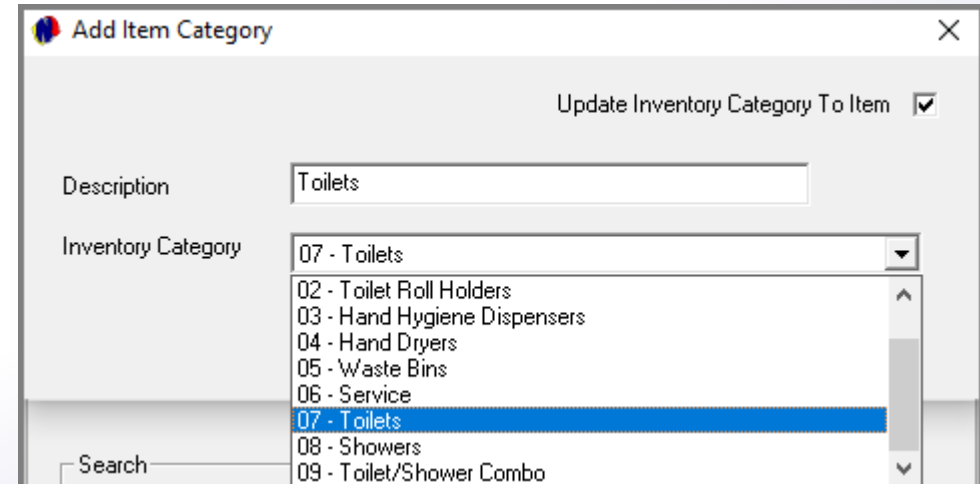


To start the process of first creating a main category, click 'Edit – Item Category / Sub-Category', and click 'Add' in the next screen.



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'.





Setup Procedures

Item Categories and Sub-Categories

Code	Description
1	Toilets

Search:

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'.

Code: 1 Update Inventory Category To Item:

Description: Toilets

Inventory Category: 07 - Toilets

ITEM SUB-CATEGORY

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



Setup Procedures

Item Categories and Sub-Categories

Add Item Sub-Category

Code: 1

Item Category: 1 Toilets

Description: VIP Toilet Trailer

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

	Including	TAX	Excluding
Price Per Day	100.00	13.04	86.96
Price Per Week	0.00	0.00	0.00
Price Per Month	2500.00	326.09	2173.91
Price Per Hour	0.00	0.00	0.00
Price Per Service	50.00	6.52	43.48

Options:
Rain Day / Off-Hire Item
Charge on Saturday
Saturday Half Day
Charge on Sunday
Charge Public Holiday
Charge Weekly Rate
Maintenance Item
Service Every: 0 Days/h
Unit: None
Update Default To Item
Update Prices to Item

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-Category

Code: 0

Item Category: 1 Toilets

Description: VIP Toilet Trailer

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

	Including	TAX	Excluding
Price Per Day	100.00	13.04	86.96
Price Per Week	0.00	0.00	0.00
Price Per Month	2500.00	326.09	2173.91
Price Per Hour	0.00	0.00	0.00
Price Per Service	50.00	6.52	43.48

Rain Day / Off-Hire Item **7**
 Charge on Saturday
 Saturday Half Day
 Charge on Sunday **8**
 Charge Public Holiday
 Charge Weekly Rate
 Maintenance Item **9**
 Service Every: 1.00 Days/h
 Unit: Days
 Update Default To Item
 Update Prices to Item

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.



Code: 0

Item Category: 1 Toilets

Description: VIP Toilet Trailer

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

Price Per Day: 100.00

Price Per Week: 0.00

Price Per Month: 2500.00

Price Per Hour: 0.00

Price Per Service: 50.00

Hygiene Service Charge Code: [Search Icon]

Suggested deposit: 0.00

Weight: [Search Icon]

Detailed Description: [Text Area]

Select Charge

Code	Description	Excl	Tax	Incl
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
REP003	Replacement Charge	0.00	0.00	0.00
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
SDR001	Soap Dispenser	217.39	32.61	250.00
SER001	Service - VIP Toilet Trailer	43.48	6.52	50.00
SER002	Service - VIP Shower/Toilet Combo	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 Trailer	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

Search By: Code

Search For: [Text Box]

As this 'VIP Toilet Trailer 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.



Add Item Sub-Category

Code: 0

Item Category: 1 Toilets

Description: VIP Toilet Trailer

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

	Including	TAX	Excluding
Price Per Day	100.00	13.04	86.96
Price Per Week	0.00	0.00	0.00
Price Per Month	2500.00	326.09	2173.91
Price Per Hour	0.00	0.00	0.00
Price Per Service	50.00	6.52	43.48

Hygiene Service Charge Code: SER001 Service - VIP Toilet Trailer

Suggested deposit: 10 10.00 X Price

Weight: 11 320.00 → Update Weight to Item

Detailed Description: 12

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.

Accept

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 Trailer) 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'.



Edit Item Category

Code: Update Inventory Category To Item

Description:

Inventory Category:

ITEM SUB-CATEGORY

Code	Description	Category Description
1	VIP Toilet Trailer	Toilets

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.

Edit Item Category

Code: Update Inventory Category To Item

Description:

Inventory Category:

ITEM SUB-CATEGORY

Code	Description	Category Description
3	12 Toilet Trailer	Toilets
2	Paralegic Toilet Trailer	Toilets
4	Single Toilet Unit	Toilets
1	VIP Toilet Trailer	Toilets

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



Setup Procedures

Item Categories and Sub-Categories

The screenshot shows a window titled "Item Category Setup" with a close button (X) in the top right corner. The window contains a table with two columns: "Code" and "Description". The table has three rows of data. Below the table is a search field with the label "Search" and a text input box. At the bottom of the window are five buttons: "Add", "Edit", "Delete", "Add Sub-Category", and "Close".

Code	Description
2	Showers
3	Toilet / Shower Combo
1	Toilets

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'.

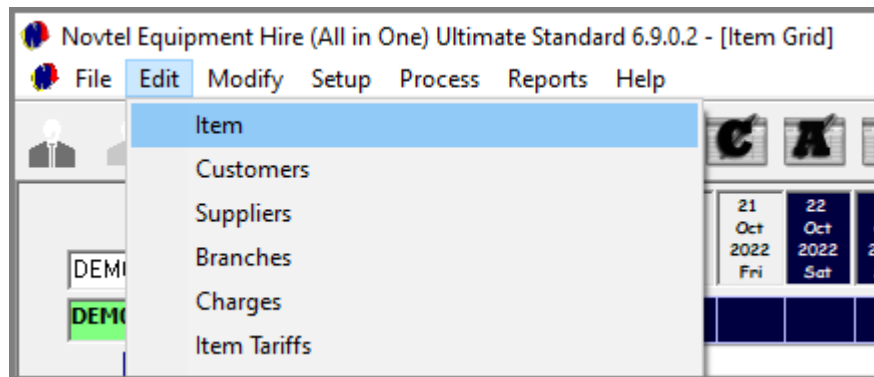
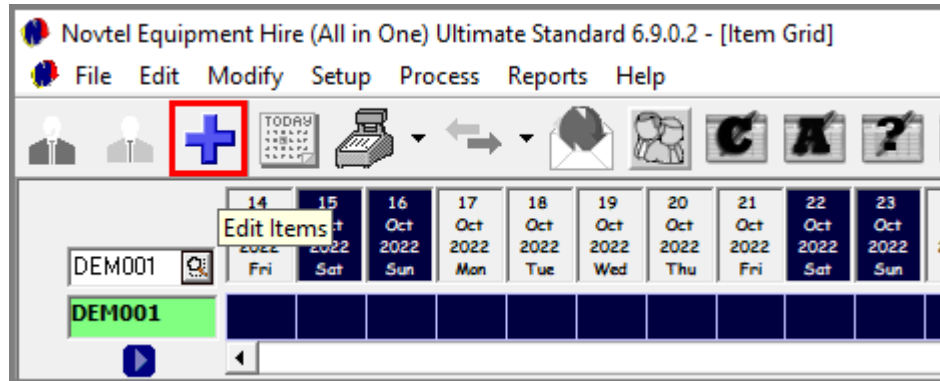


CREATING ITEMS

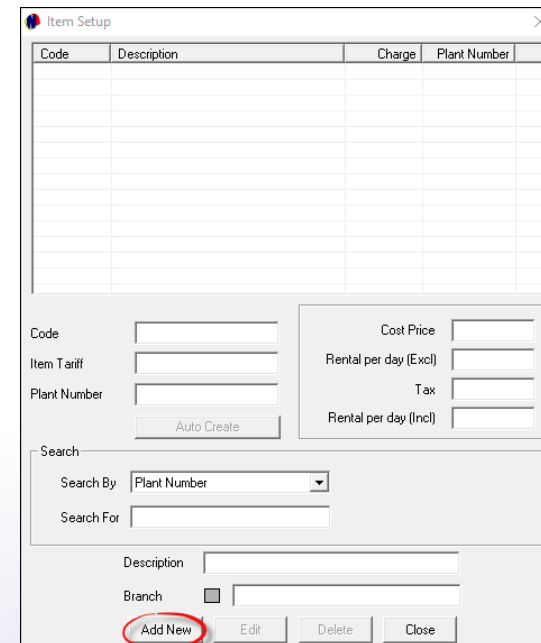
To rent out the Toilet and Shower trailers or units, it must be created as 'Items'.

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'.



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





The screenshot shows the 'Add New Item' form with the following fields: Code, Description, Barcode, and a checkbox labeled 'Create Item In Pastel'. The checkbox is checked and highlighted with a red rectangular box.

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 screenshot shows the 'Add New Item' form with the 'General' tab selected. The 'Plant Number' field is highlighted with a red circle and the number '2'. A red arrow points from the 'Plant Number' field to the 'Description' field, which contains the text '101'. The 'Home Branch' dropdown menu is also highlighted with a red circle and the number '1'.

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:



Add New Item

Code Create I

Description

General | Details | Financial | User Defined Fields

Branch Mossel Bay, Main Branch

Plant Number

Serial Number

External Reference

Manufacturer

Type

Item Category

Item Sub Category

In Stock

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.

Add New Item

Code Create Item In Pastel Barcode

Description

General | Details | Financial | User Defined Fields | Pastel Interface | Kit Items | Fixed Non-Rentals

Home Branch

Branch Mossel Bay, Main Branch Mossel Bay, Main Branch

Plant Number

Serial Number

External Reference

Manufacturer

Type

Item Category

Select Item Category

Code	Description
2	Showers
3	Toilet / Shower Combo
1	Toilets

Accept Cancel

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.



Description	Item Sub Category
12 Toilet Trailer	3
Paraplegic Toilet Trailer	2
Single Toilet Unit	4
VIP Toilet Trailer	1

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.

Code:

Description: VIP Toilet Trailer, Blue Loo, 101

Branch: Mossel Bay, Main Branch

Plant Number: 101

Serial Number: ABC123

Manufacturer: Blue Loo

Type: Hygiene

Item Category: 1 Toilets

Item Sub Category: 1 VIP Toilet Trailer



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 Create Item In Pastel Barcode

Description VIP Toilet Trailer, Blue Loo, 101

General Details Financial User Defined Fields Pastel Interface Kit Items Fixed Non-Rentals

Branch Mossel Bay, Main Branch Home Branch Mossel Bay, Main Branch

Plant Number 101 Show On Grid 9

Serial Number ABC123 Subhire Item

External Reference Monthly Billed Item

Manufacturer Blue Loo Maintenance Item 10

Type Hygiene Rain Day/Off-Hire Item

Item Category 1 Toilets

Item Sub Category 1 VIP Toilet Trailer

In Stock 1 8

On Rent 0

Available 1

Charge on Sunday 11

Charge on Saturday

Saturday Half Day

Charge Public Holiday

Kit Quantity 1 Kit Item Master Kit Item

Accept Cancel



Add New Item

Code 01001001 1 Create Item In Pastel Barcode

Description VIP Toilet Trailer, Blue Loo, 101

General Details Financial User Defined Fields Pastel Interface Kit Items Fixed Non-Rentals

Import Inventory Item

Code 01001001

Description VIP Toilet Trailer, Blue Loo, 101

Inventory Group 003 - VIP Toilet Trailer 2

Excl Selling Price 86.96 Physical Item Service Item

Create Cost Code

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

Multi-Store Select
All Multi-Stores
Selected Multi-Stores

Accept Cancel

Import Inventory Item

Code 01001001

Description VIP Toilet Trailer, Blue Loo, 101

Inventory Group 003 - VIP Toilet Trailer

Excl Selling Price 86.96 3 Physical Item Service Item 4

Create Cost Code 5

Code	Description
<input checked="" type="checkbox"/> 001	Default Store 6

Multi-Store Select
All Multi-Stores
Selected Multi-Stores

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'.
5. 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'.



Code	Description	Charge	Plant Number
DEM001	Only for Demo you can Delete this item	0.00	
01001001	VIP Toilet Trailer, Blue Loo, 101	100.00	101

Code: 01001001
Item Tariff:
Plant Number: 101
Auto Create

Cost Price: 0.00
Rental per day (Excl): 86.96
Tax: 13.04
Rental per day (Incl): 100.00

Search By: Plant Number
Search For:
Description: VIP Toilet Trailer, Blue Loo, 101
Branch: Mossel Bay, Main Branch
Add New Edit Delete Close

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.

Code: 01001001
Barcode:
Description: VIP Toilet Trailer, Blue Loo, 101

General **Details** Financial User Defined Fields Pastel Interface Kit Items Fixed Non-Rentals

General Details:
Tyres Make:
Spare Tyre Make:
Battery Make:
License Due: 2022/10/10
Date Sold: 2022/10/10
Weight: 0

Service Interval:
Current Rental Days: 0
First Maintenance: 0 RD
Recurring Interval: 0 RD
Next Maintenance: 0 RD
RD - Rental Days

Detailed Description of Item

Accept Cancel



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.

Edit Item

Code: 01001001 Barcode:

Description: VIP Toilet Trailer, Blue Loo, 101

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

Cost Price: 360000.00

	Per Day	Per Week	Per Month	Per Hour	Per Service
Rental Excl Tax	86.96	0.00	2173.91	0.00	43.48
Tax	13.04	0.00	326.09	0.00	6.52
Rental Incl Tax	100.00	0.00	2500.00	0.00	50.00

15 - Vat - Standard rated (15%) Per Day

Item Setup

Code	Description	Charge	Plant Number
01001001	VIP Toilet Trailer, Blue Loo, 101	100.00	101
01001002	VIP Toilet Trailer, Blue Loo, 102	100.00	102
01001003	VIP Toilet Trailer, Blue Loo, 103	100.00	103
01001004	VIP Toilet Trailer, Blue Loo, 104	100.00	104
01003001	12 Toilet Trailer, Blue Loo, 111	300.00	111
01003002	12 Toilet Trailer, Blue Loo, 112	300.00	112
01003003	12 Toilet Trailer, Blue Loo, 113	300.00	113
01003004	12 Toilet Trailer, Blue Loo, 114	300.00	114
01002001	Paraplegic Toilet Trailer, Blue Loo, 121	120.00	121
01002002	Paraplegic Toilet Trailer, Blue Loo, 122	120.00	122
01004001	Single Toilet Unit, Blue Loo, 201	50.00	201
01004002	Single Toilet Unit, Blue Loo, 202	50.00	202
01004003	Single Toilet Unit, Blue Loo, 203	50.00	203
01004004	Single Toilet Unit, Blue Loo, 204	50.00	204

Code: 01003002 Cost Price: 340000.00

Item Tariff: Rental per day (Excl): 260.87

Plant Number: 112 Tax: 39.13

Auto Create Rental per day (Incl): 300.00

Search

Search By: Plant Number

Search For:

Description: 12 Toilet Trailer, Blue Loo, 112

Branch: Mossel Bay, Main Branch

Add New Edit Delete Close

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

When done, click 'Close'.



Setup Procedures

Items

The screenshot shows the 'Novtel Equipment Hire (All in One) Ultimate Standard 6.9.0.2 - [Item Grid]' window. At the top, there is a menu bar (File, Edit, Modify, Setup, Process, Reports, Help) and a toolbar with various icons. Below this is a calendar view for the month of October 2022, with dates 14 through 17 highlighted. The main area is a grid with columns for dates and rows for item codes. The item codes listed on the left are: 01001001, 01001002, 01001003, 01001004, 01002001, 01002002, 01003001, 01003002, 01003003, 01003004, 01004001, 01004002, 01004003, 01004004, and 02001001. The codes 01001001 through 01004004 are highlighted in green. Below the grid is a form for 'View Items by' with radio buttons for Code, Available, On Rent, and Maintenance. There are also fields for Mobile Phone, Fax, Telephone, and Contract. To the right of the form is a list of checkboxes for item status: Cancelled, Provisional, Confirmed, On Rent, Returned, Fully Paid, and Non Rev.

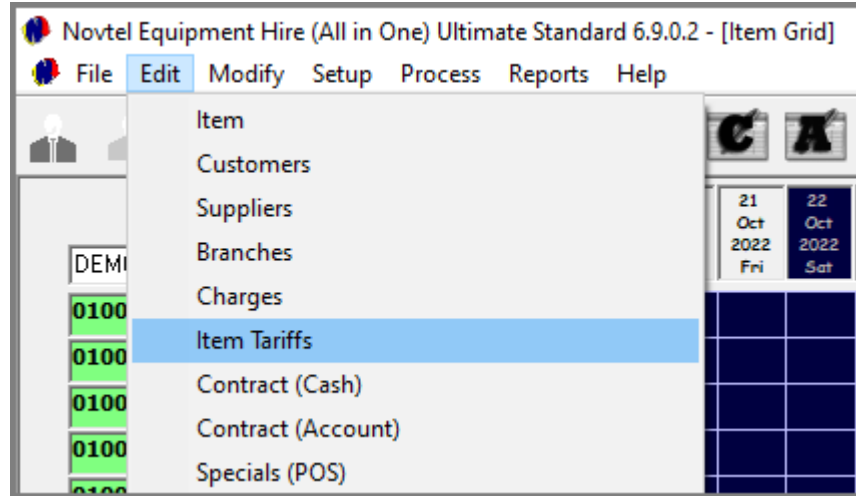
The Item Code is indicated in the colour of the selected Branch, which in this case, is the Mossel Bay Main Branch.

Returning to the Grid, all Items for which the 'Show on Grid' option were selected, will be displayed here. We have set up in our system to only display the first 15 Items, and the rest can be accessed by clicking on the down arrow on the right-hand side of the Grid.

This is a close-up view of the bottom right corner of the item grid. It shows the item codes 01001001 through 02001001. A blue arrow points to a small downward-pointing arrow icon located at the bottom right of the grid, next to the item code 02001001.

This is another close-up view of the item grid, showing item descriptions next to the item codes. The items listed are: 01001001 VIP Toilet Trailer, Blue; 01001002 VIP Toilet Trailer, Blue; 01001003 VIP Toilet Trailer, Blue; 01001004 VIP Toilet Trailer, Blue; 01002001 Paraplegic Toilet Trailer; 01002002 Paraplegic Toilet Trailer; 01003001 12 Toilet Trailer, Blue Loo; 01003002 12 Toilet Trailer, Blue Loo; 01003003 12 Toilet Trailer, Blue Loo; 01003004 12 Toilet Trailer, Blue Loo; 01004001 Single Toilet Unit, Blue; 01004002 Single Toilet Unit, Blue; 01004003 Single Toilet Unit, Blue; 01004004 Single Toilet Unit, Blue; and 02001001 3 Shower Trailer, Sunny.

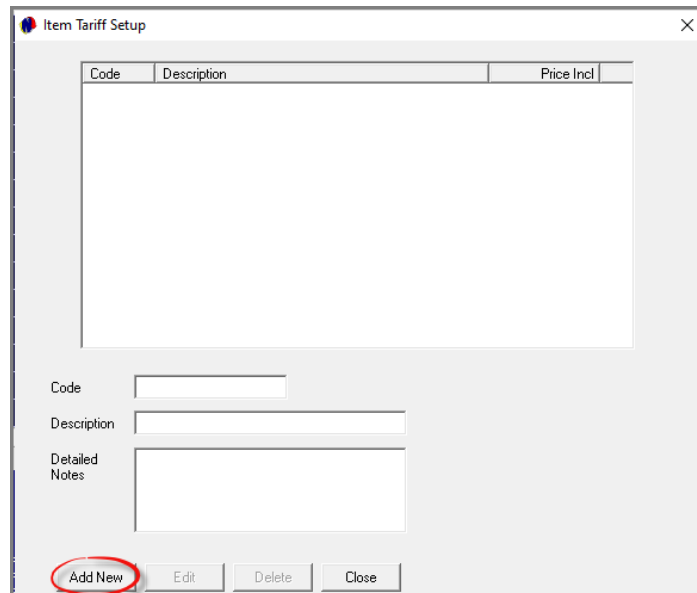
By clicking on the arrow pointing to the right, below the Grid, the Item Descriptions are indicated next to the Item Code.



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

Tariff Code: 00

Description: o category...

Customer Category: 0 - No category

Item Category: 0 - No category, 1 - Corporate Customer, 2 - Private Customer, 3 - Government Institution, 4 - Sports Institution, 5 - Construction Industry

Item Sub Category: [Empty]

Detailed Notes: [Empty]

Rental Price Day Incl: 0.00

Rental Price Week Incl: 0.00

Rental Price Month Incl: 0.00

Rental Price Hourly Incl: 0.00

Hygiene Fee Incl: 0.00

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.

Add Item Tariff

Tariff Code: 05

Description: Construction Industry, .

Customer Category: 5 - Construction Industry

Item Category: [Empty]

Item Sub Category: [Empty]

Detailed Notes: [Empty]

Rental Price Day Incl: 0.00

Rental Price Week Incl: 0.00

Rental Price Month Incl: 0.00

Rental Price Hourly Incl: 0.00

Hygiene Fee Incl: 0.00

Accept Cancel

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



Add Item Tariff

Tariff Code: 05

Description: Construction Industry, .

Customer Category: 5 - Construction Industry

Item Category: [Search Icon]

Item Sub Category:

Detailed Notes:

Rental Price Day Incl: 0.00

Rental Price Week Incl: 0.00

Rental Price Month Incl: 0.00

Select Item Category

Code	Description
2	Showers
3	Toilet / Shower Combo
1	Toilets

Buttons: Accept, Cancel

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

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

Buttons: Select, Cancel

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

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'.

Add Item Tariff

Tariff Code: 0507004

Description: Construction Industry, Toilets, Single Toilet Unit

Customer Category: 05 - Construction Industry

Item Category: 7 Toilets

Item Sub Category: 4 Single Toilet Unit

Detailed Notes:

Rental Price Day Incl: 40.00

Rental Price Week Incl: 0.00

Rental Price Month Incl: 1000.00

Rental Price Hourly Incl: 0.00

Hygiene Fee Incl: 35.00

Buttons: Accept, Cancel



Code	Description	Price Incl
0507004	Construction Industry, Toilets, Single Toilet Unit	40.00

Code: 0507004
Description: Construction Industry, Toilets, Single T
Detailed Notes:

Buttons: Add New, Edit, Delete, Close

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.

Novtel Equipment Hire (All in One) Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process

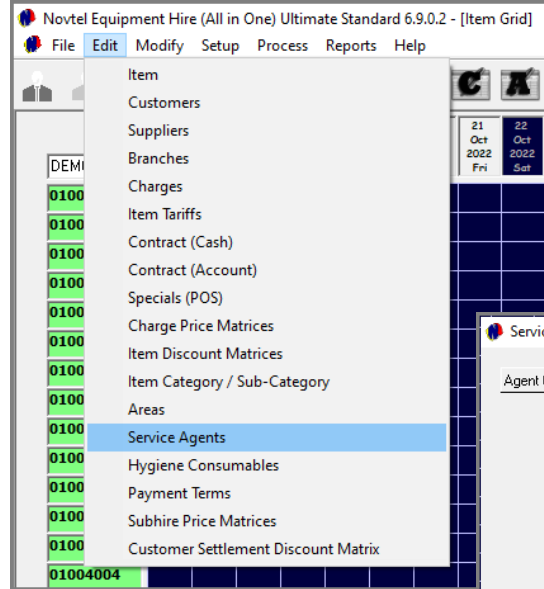
14 Oct 2022 Fri, 15 Oct 2022 Sat, 16 Oct 2022 Sun, 17 Oct 2022 Mon, 26 Oct 2022 Wed, 27 Oct 2022 Thu, 28 Oct 2022 Fri, 29 Oct 2022 Sat, 30 Oct 2022 Sun, 31 Oct 2022 Mon, 01 Nov 2022 Tue, 02 Nov 2022 Wed, 03 Nov 2022 Thu, 04 Nov 2022 Fri

DEM001

01001001, 01001002, 01001003, 01001004, 01002001, 01002002, 01003001, 01003002, 01003003, 01003004, 01004001, 01004002

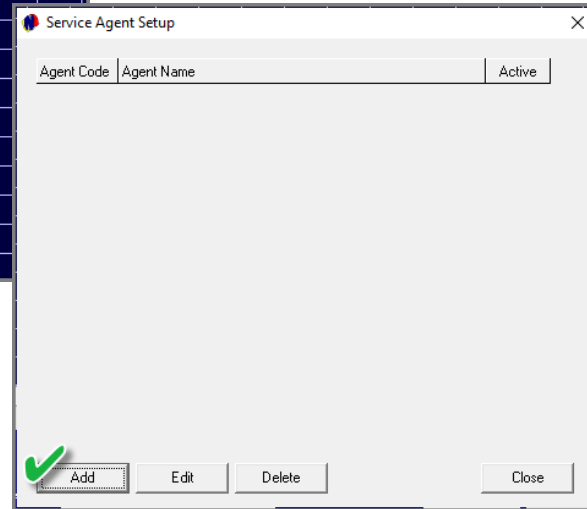
Hygiene Service Reports
Hygiene Route Sheet
Hygiene Re-Schedule Audit Log
Hygiene Doc Number Reporting
Ablution Hire Details
Activity
List Of Availability
Rental Statistics
Usage Report
Utilization
Audit Log By User
Comments & Remarks
List
List Item Links
Contracts NOT Invoiced
Invoiced Contracts
Deposits

Item Tariffs
Items
Kit Item Groups
Charges
Charges not linked to Pastel



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

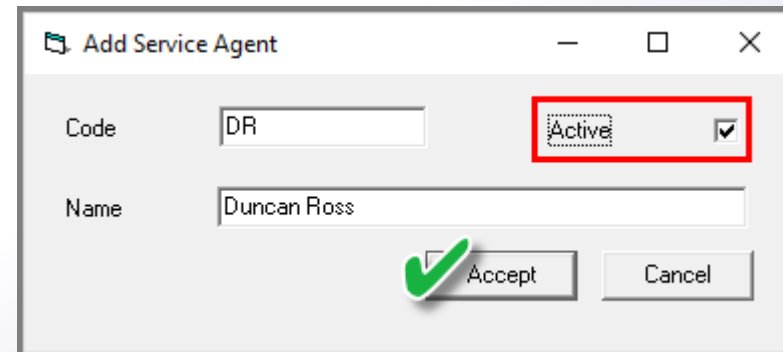
To start the process, click on the 'Edit' menu and select 'Service Agents'.



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

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

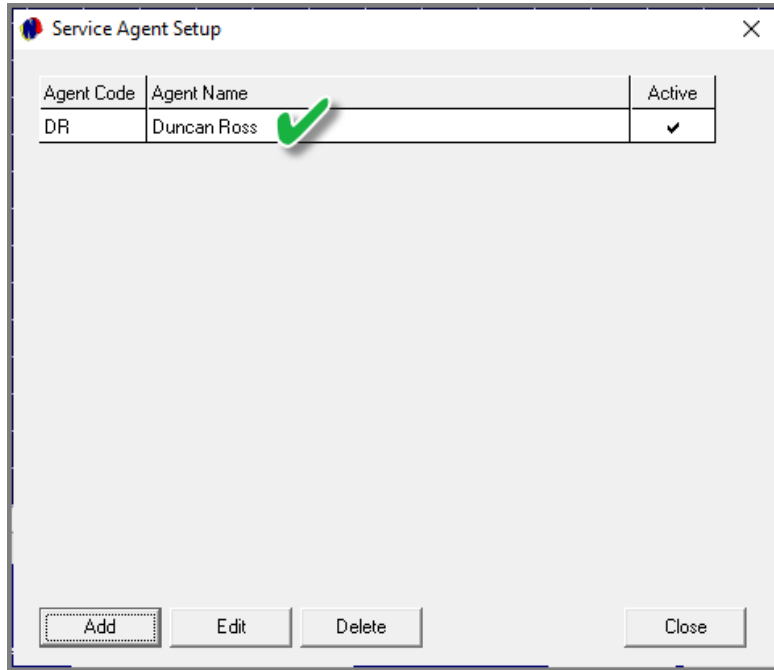
The person's name is entered in the next field, and the service agent is marked as 'Active'. Then, click 'Accept' to save this new service agent.



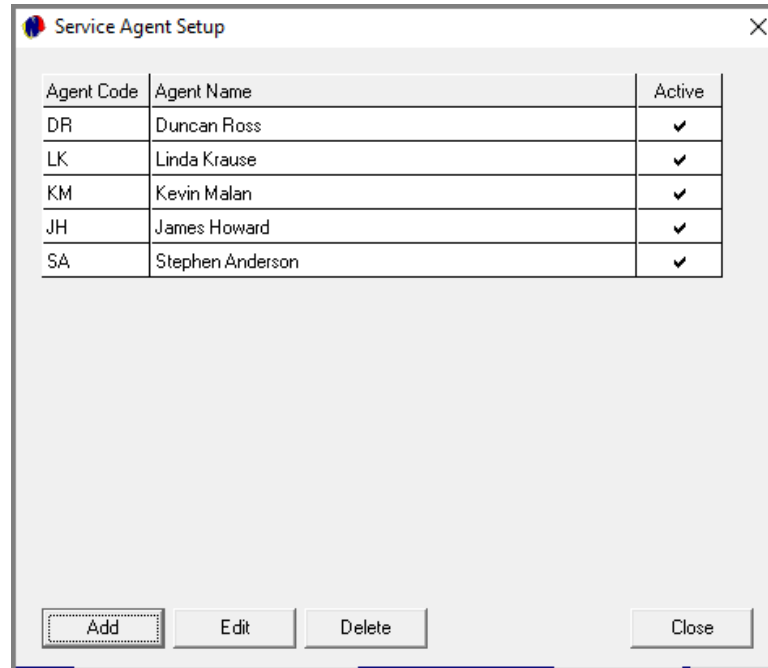


Setup Procedures

Service Agents



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.

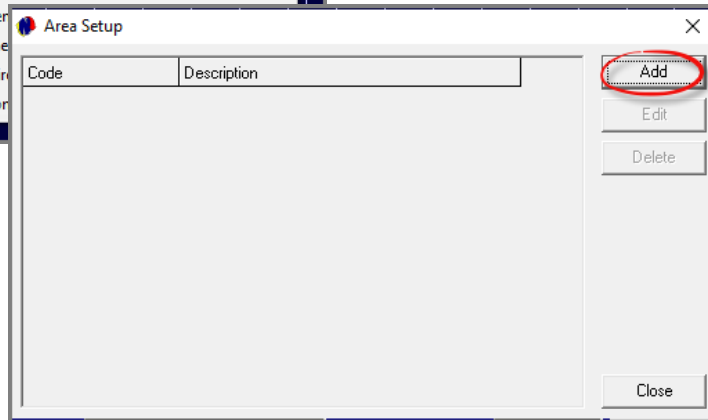
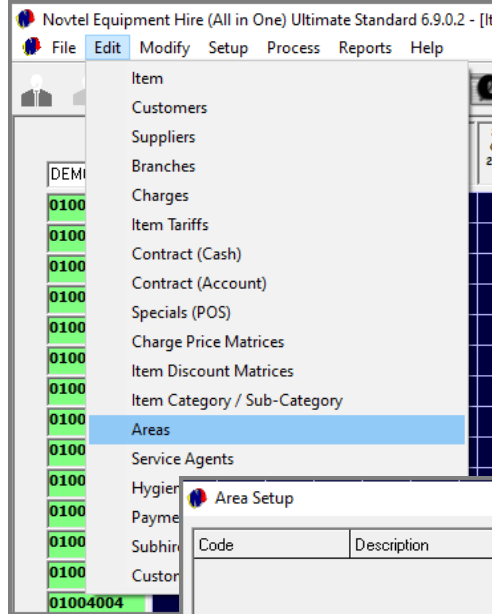




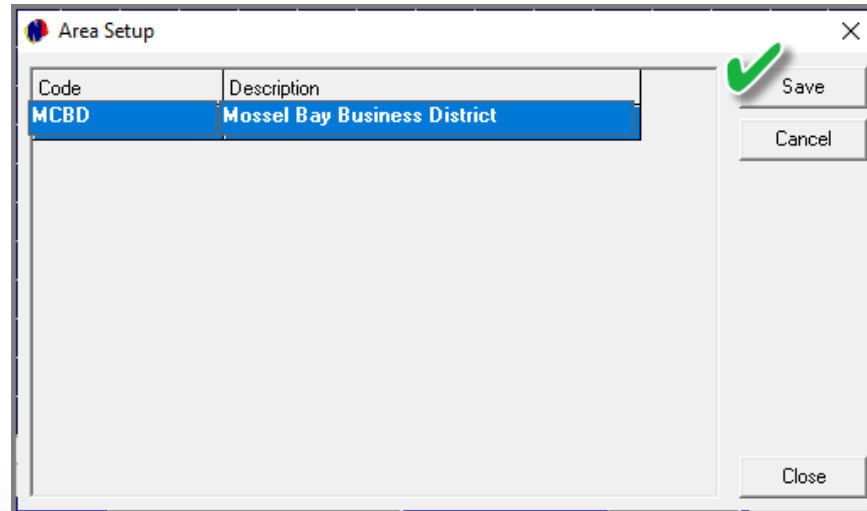
'Areas' are to be created since it is:

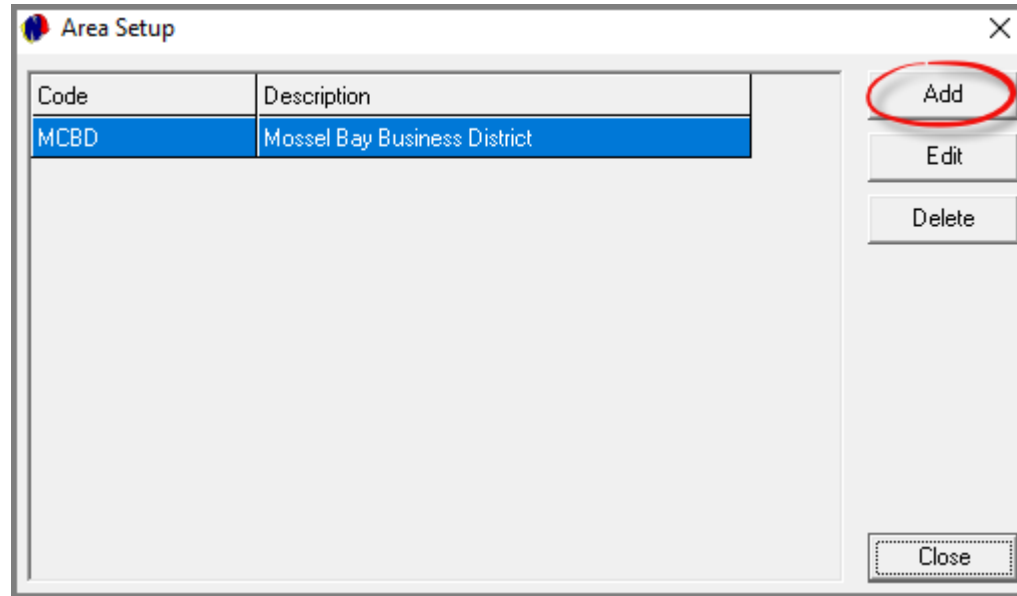
- ✓ Linked to a site on the Customer's master file – which in turn is linked to a contract
- ✓ Used to plan a route when setting the 'Hygiene Schedule'
- ✓ And a specific Area can be allocated to a Service Agent – which may include multiple sites situated in the same Area.

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.



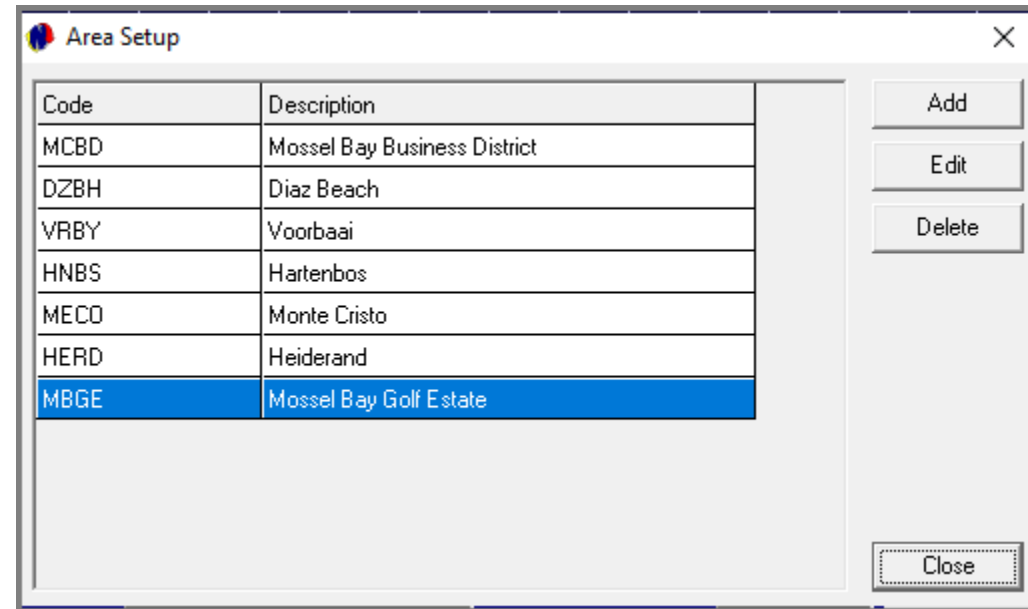
Click in the activated line in the 'Code' field and enter a unique code. Then, click in the 'Description' column and enter the corresponding description for this area before clicking 'Save'.





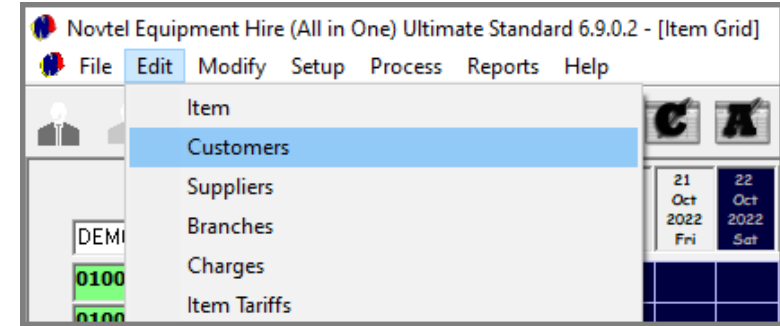
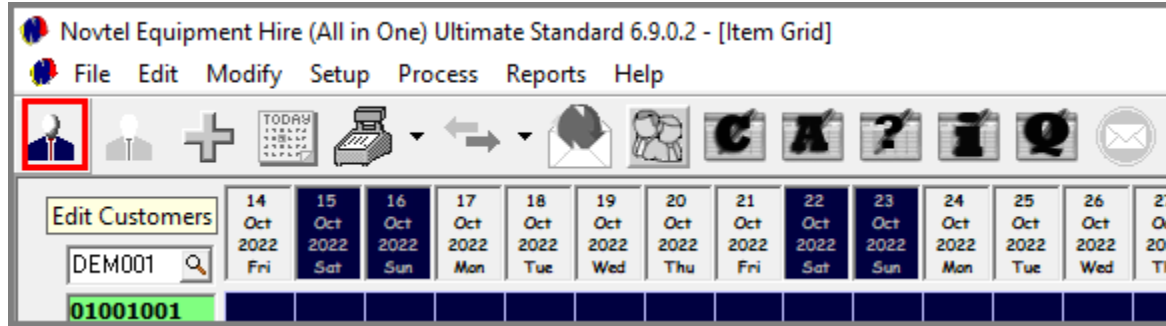
The first area is now created, and the process is repeated until all relevant Areas have been created.

When done, click 'Close'.





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



Both options give access to this screen from which the 'Add New' button is to be clicked.



Add New Customer

Account Code **1 X** Corporate Customer

External Account Ref

Description * Peterson Dave **2** Order Number Required

Customer Category 00 - No category Use Item Tariff Prices

General | Site Details | Contract Details | Use

Postal Address *

Company Name

Last Name * Peterson

First Name * Dave

Title 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.

Add New Customer

Account Code Corporate Customer

External Account Ref

Description * Peterson Construction

Customer Category 00 - No category Use Item Tariff Prices

General | Site Details | Contract Details | Use

Postal Address *

Company Name Peterson Construction

Last Name * Peterson

First Name * Dave

Title Mr Initials * D

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.

General | Site Details | Contract Details | User Defined Fields

Postal Address *

Company Name Peterson Construction

Last Name * Peterson

First Name * Dave

Title Mr Initials * D



3. Customer Category

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

Description * Peterson Construction

Customer Category 5 - Construction Industry

Corporate Customer

Order Number Required

Use Item Tariff Prices

General

- 0 - No category
- 1 - Corporate Customer
- 2 - Private Customer
- 3 - Government Institution
- 4 - Sports Institution
- 5 - Construction Industry

Postal Address Peterson Construction

Contract Details



Billing Interval 7 On Month End 0

- On Month End
- On 25th Day
- On 28th Day
- No Month End

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 * 98 Construction Street
Moss Induxtria
Mossel Bay
6500

Copy Postal Address to Physical

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.



Tax Reference 9

Credit Limit 10

Payment Terms

* Required Fields

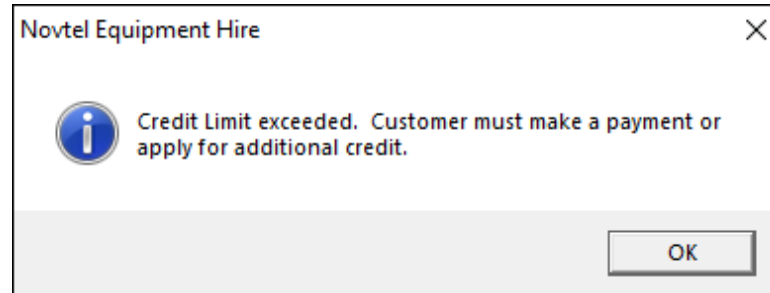
Account Balance	On Rent Total	Total Due	Available Credit
0.00	0.00	0.00	20000.00

9. Tax Reference

The Company's tax reference 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.



Credit Limit

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



Tax Reference: 123456789

Credit Limit:

Payment Terms: **11**

Notes:

* Required Field

Select Payment Terms

Code	Description
1	COD
2	30 Days
3	60 Days
4	90 Days

11. Payment Terms

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

Company Name: Peterson Construction

Last Name *: Peterson

First Name *: Dave

12 Title: Mr Initials *: D

Date of Birth: 1978/10/11 M / F: M

ID Number *: 78101101020304 RSA ID

False ←

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.

Title: Mr Initials *: D

Date of Birth: 1976/12/30 M / F: M

ID Number *: 761230 RSA ID

Valid ←

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.



Company Reg No 123ABC456DEF
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

13. Other Details

All other details – of which some are mandatory fields to be populated - are to be entered.

Account Code

External Account Ref

Description * Peterson Construction

Customer Category 5 - Construction Industry

Corporate Customer Billing Interval On Month End 0

Order Number Required Use Item Tariff Prices

General Site Details Contract Details User Defined Fields Private Customer

Postal Address * 98 Construction Street
Moss Industria
Mossel Bay
6500

Physical Address * 98 Construction Street
Moss Industria
Mossel Bay
6500

Copy Postal Address to Physical

Tax Reference 123456789

Credit Limit 0

Payment Terms

Notes

* Required Fields

Company Name Peterson Construction
Last Name * Peterson
First Name * Dave
Title Mr Initials * D
Date of Birth 1976/12/30 M / F M
ID Number * 761230010203 RSA ID

Company Reg No 123ABC456DEF
Telephone No * 044 693 123456
Fax No
Mobile Phone * 082 12345678
AH Telephone
Email Address peterson@construct.com
Search Number
Contact Person * Dave Peterson

Block Customer Account

Start Camera

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

Provisional Customer Statement Pastel Customer Statement Accept Cancel

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'.



The screenshot shows a window titled 'Customers' with a table of customer records. The table has columns: Description, Number, ID Number, Telephone, Mobile Phone, External Ref, Physical Address, Postal Address, Email, and a status indicator. The first row is highlighted in blue and contains: Peterson Construction, PE0001, 761230010203, 044 693 12345, 082 12345678, , 98 Construction Stree, 98 Construction Stree, peterson@construct., and F. Below the table is a search section with radio buttons for various fields: Number, Description (selected), ID Number, Telephone #, Mobile Phone #, External Ref, Physical Address, Postal Address, and Email Address. A search box contains the text 'Peterson' with a red '1' next to it. A red arrow points from the search box to the 'Description' radio button. On the right side of the window, there are buttons for 'Refresh <F5>', 'Add New <F6>', 'Edit' (with a green checkmark), and 'Cancel'.

Description	Number	ID Number	Telephone	Mobile Phone	External Ref	Physical Address	Postal Address	Email	
Peterson Construction	PE0001	761230010203	044 693 12345	082 12345678		98 Construction Stree	98 Construction Stree	peterson@construct.	F

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.

The screenshot shows a form titled 'ACCOUNT CUSTOMER'. The 'Account Code' field is highlighted with a red box and contains the value 'PE0001'. A red arrow points from this field to the 'Corporate Customer' checkbox, which is checked. Other fields include 'External Account Ref' (empty), 'Description *' (Peterson Construction), and 'Customer Category' (5 - Construction Industry). There are also checkboxes for 'Order Number Required' (unchecked) and 'Use Item Tariff Prices' (checked).

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.



ACCOUNT CUSTOMER

Account Code PE0001 Corporate Customer Billing Interval On Month End 0

External Account Ref

Description * Peterson Construction Order Number Required

Customer Category 5 - Construction Industry Use Item Tariff Prices

General		Site Details	Contract Details		User Defined Fields	Private Customer
ID	Site	Contact	Mobile	Site #		
PE0001/001	98 Construction Street		082 12345678	001		

Add Edit Delete

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.

ACCOUNT CUSTOMER

Account Code PE0001 Corporate Customer Billing Interval On Month End 0

External Account Ref

Description * Peterson Construction Order Number Required

Customer Category 5 - Construction Industry Use Item Tariff Prices

General		Site Details	Contract Details	User Defined Fields	Private Customer
Volume	Contract	Start Date	End Date	Status	Site Description

Edit / View All Contracts On Rent Contracts Outstanding Items Outstanding Contract Balances

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

Account Balance 0.00 | On Rent Total 0.00 | Total Due 0.00 | Available Credit 0.00 | Provisional Customer Statement | Pastel Customer Statement | Accept | Cancel

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.



ACCOUNT CUSTOMER

Account Code: PE0001 Corporate Customer Billing Interval: On Month End 0

External Account Ref:

Description: Peterson Construction Order Number Required

Customer Category: 5 - Construction Industry Use Item Tariff Prices

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

User Defined Field 1

User Defined Field 2

User Defined Field 3

User Defined Field 4

User Defined Field 5

The User Defined Fields Tab

Any additional information – not covered by the system – and which your company wishes to capture, can be added in these 5 fields, respectively.

Please note that Custom captions can be created from the ‘Setup’ menu, and the captions will be displayed here.

Novtel Ablution Hire Ultimate Standard 6.9.0.2 - [Item Grid]

File Edit Modify Setup Process Reports Help

Account Balance: 0.00 On Rent Total: 0.00

	21 Sep 2022	22 Sep 2022	23 Sep 2022	24 Sep 2022	25 Sep 2022	26 Sep 2022	27 Sep 2022	28 Sep 2022	29 Sep 2022	30 Sep 2022	01 Oct 2022	02 Oct 2022	03 Oct 2022	04 Oct 2022	05 Oct 2022	06 Oct 2022	07 Oct 2022	08 Oct 2022	09 Oct 2022	10 Oct 2022	11 Oct 2022	12 Oct 2022	13 Oct 2022
01001001	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu
01001001																							
01001002																							
01001003																							
01001004																							
01002001																							
01002002																							
01003001																							
01003002																							
01003003																							
01003004																							
01004001																							
01004002																							
01004003																							
01004004																							
02001001																							

View Items by: Code Available Plant No On Rent Transfer Maintenance

Mobile Phone: Fax: Telephone:

Account Balance: Deposit Paid Total: Invoice Total: Receipt Total: Deposit Forfeit: Deposit Refund: Reservation Balance:

User Defined Field 1

User Defined Field 2

User Defined Field 3

User Defined Field 4

User Defined Field 5

2022/09/21 2022/10/25

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.



ACCOUNT CUSTOMER

Account Code: PE0001 Corporate Customer Billing Interval: On Month End 0

External Account Ref:

Description: Peterson Construction Order Number Required

Customer Category: 5 - Construction Industry Use Item Tariff Prices

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

ID	ID Number	Lastname	Firstname	Title
	761230010203	Peterson	Dave	Mr

Add Edit Delete

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

Provisional Customer Statement Pastel Customer Statement Accept Cancel

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: 001

Last Name: Peterson Default Contact

First Name: Dave

Customer Code: PE0001 Peterson Construction

General Photo Spouse Employment Dependants References Access Tags

ID Number: 761230010203

Title: Mr

Initials: D

Date of Birth: 1976/12/30

Gender: M Maiden Name:

Marital Status: Married in community of property Date Married: 2002/01/30

Accept Cancel



ACCOUNT CUSTOMER

Account Code: PE0001 Corporate Customer Billing Interval: On Month End 0

External Account Ref:

Description: Peterson Construction Order Number Required

Customer Category: 5 - Construction Industry Use Item Tariff Prices

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

ID	ID Number	Lastname	Firstname	Title
	761230010203	Peterson	Dave	Mr

Add Edit Delete

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

Provisional Customer Statement Pastel Customer Statement Accept Cancel

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.



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.

ACCOUNT CUSTOMER

Account Code PE0001 Corporate Customer Billing Interval On Month End 0

External Account Ref

Description * Peterson Construction Order Number Required

Customer Category 5 - Construction Industry Use Item Tariff Prices

General Site Details Contract Details User Defined Fields Private Customer

Postal Address * 98 Construction Street
Moss Industria
Mossel Bay
6500

Physical Address * 98 Construction Street
Moss Industria
Mossel Bay
6500

Copy Postal Address to Physical

Tax Reference 123456789

Credit Limit 0

Payment Terms

Notes

Required Fields

Company Name Peterson Copy To Description

Last Name * Peterson Telephone No * 123ABC456DEF 044 693 123456

First Name * Dave Mobile Phone * 082 12345678

Title Mr Initials * D AH Telephone

Date of Birth 1976/12/30 M / F M

ID Number * 761230010203 RSA ID Email Address peterson@construct.com

Search Number 761230010203

Contact Person * Dave Peterson

Block Customer Account

Start Camera

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

Provisional Customer Statement Pastel Customer Statement Accept Cancel

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.

Send

From v Louise@novtel.com

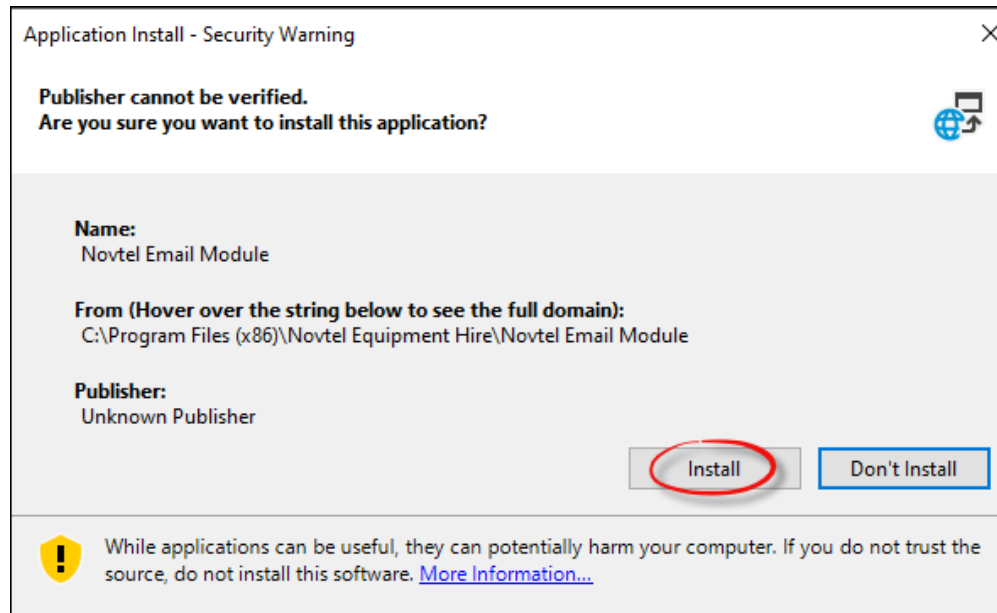
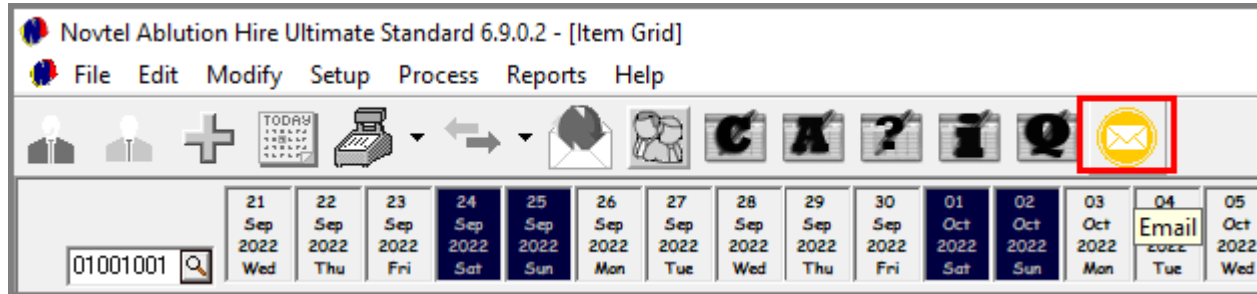
To peterson@construct.com

Cc

Bcc



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.



The screenshot shows the 'Setup Email' application window. The main window has several sections: 'Message Options' with radio buttons for 'Save Only To Drafts' (selected) and 'Send Directly'; 'Attachment Options' with three input fields for attachments; 'Global Subject' and 'Global Message' text areas; and 'Documents to include' with radio buttons for 'Statement Only' (selected), 'Invoices Only', and 'Statement and Invoices'. There are also checkboxes for 'Include Hygiene Doc Number Reporting' and 'Generate Report After Sending'. An 'Invoice Layout' dropdown and an 'Export Path' input field are also visible.

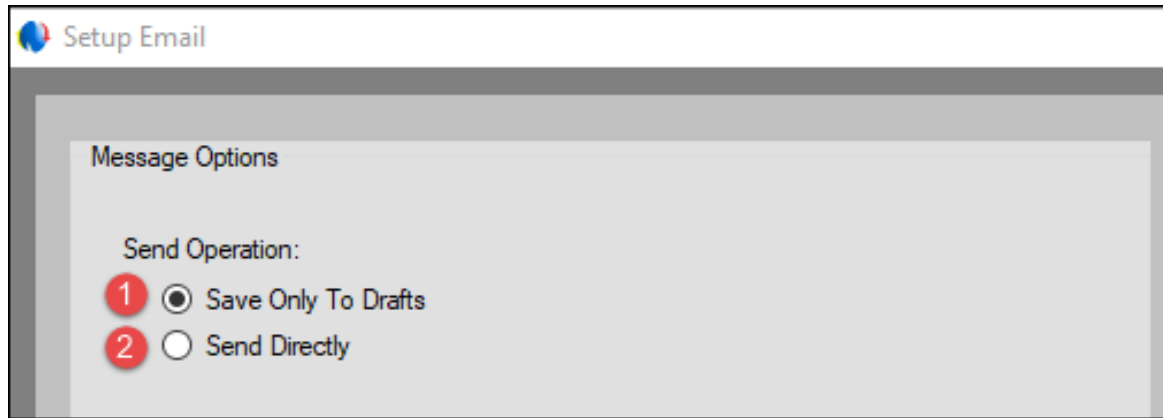
The 'Report Type Selection' dialog box is open in the foreground. It has a 'Date Selection' section with 'From' and 'To' dropdowns set to 'October' and '2022'. Below this is a 'Customer Selection' section with 'From Customer' and 'To Customer' dropdowns, both set to 'PE0001' and 'Peterson Construction'. A green box highlights these two rows. A note below says 'Only Select "From Customer" when selecting a single customer'. The dialog has 'Accept' and 'Cancel' buttons at the bottom.

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.



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 Options

Send Operation:

- Save Only To Drafts
- Send Directly

Global Subject:

Hygiene Experts - Invoice and Statement

Global Subject

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

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

All Unread By Date ↑

peterson@construct...
Hygiene Experts - Invoice a...
Dear Customer Thank you

None

Send

From Louise@novtel.com

To peterson@construct.com

Cc

Bcc

Subject Hygiene Experts - Invoice and Statement



Setup Email

Message Options

Send Operation:

Save Only To Drafts
 Send Directly

Global Subject:

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

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:

Send


From


To

Cc

Bcc

Subject Hygiene Experts - Invoice and Statement

 Invoice_2 8 KB

 HygieneDocNumberReporting_PE0002 8 KB

Dear Customer

Thank you for your continued support.
Please find attached your Invoice and Statement.

Kind Regards.
The Hygiene Experts Team



Documents to include:

Statement Only

Invoices Only

Statement and Invoices

Include Hygiene Doc Number Reporting

Send

From

To

Cc

Bcc

Subject Hygiene Experts - Invoice and Statement

Dear Customer

Thank you for your continued support.
Please find attached your Invoice and Statement.

Kind Regards,
The Hygiene 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.



Setup Procedures

Documents to include:

Statement Only

Invoices Only

Statement and Invoices

Include Hygiene Doc Number Reporting

Generate Report After Sending

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:

Generated Report After Sending			
Customer	Attachments	Status	Email
PE0002	Invoice_2	Successful	peter@construct.com
PE0002	Hygiene Doc Number Report	Successful	peter@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.

The screenshot shows the 'Setup Email' window with the following configuration:

- Message Options:**
 - Send Operation: Save Only To Drafts, Send Directly
 - Global Subject: 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
 - Documents to include: Statement Only, Invoices Only, Statement and Invoices, Include Hygiene Doc Number Reporting
 - Generate Report After Sending
- Attachment Options:** 10 attachment fields, each with a search icon. A 'Reset All Attachments' button is located below the fields.
- Invoice Layout:** Logo Left (selected from a dropdown menu)
- Export Path:** C:\Users\User\Desktop\Document Exports (with a search icon)

Buttons at the bottom right: Accept, Close



Message Options

Send Operation:
 Save Only To Drafts
 Send Directly

Global Subject:
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

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

Generate Report After Sending

Attachment Options

Attachment 1:

Attachment 2:

Attachment 3:

Attachment 4:

Attachment 5:

Attachment 6:

Reset Attachments

Invoice Layout: Logo Left

Export Path: C:\Users\User\Desktop\Document Exports
(Leave blank to use default export path)

Accept Close

All Relative Documentation has been Generated, Exported and Sent. If any errors occurred, a failurelist will be displayed.

OK

Clicking 'Accept', the email(s) are either sent directly to the Customer(s) or saved to the email 'Drafts' folder, and this report is generated if the option was selected to do so.

Generated Report After Sending

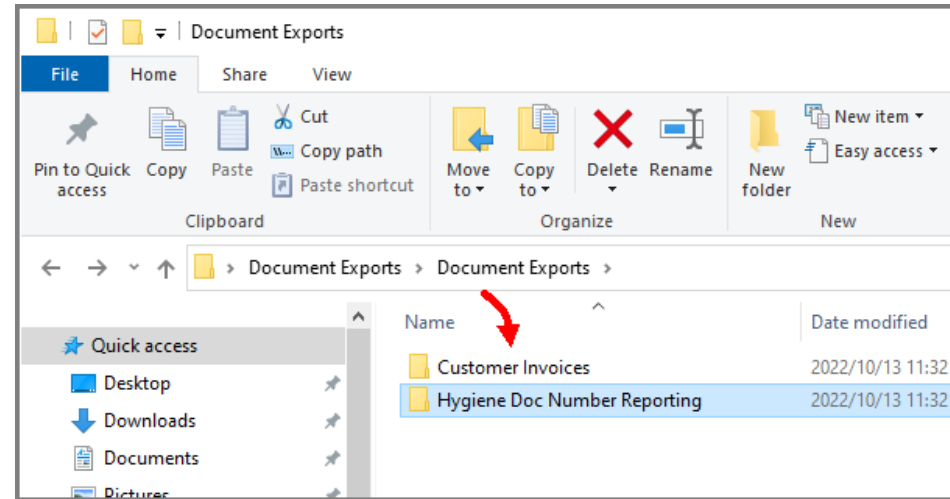
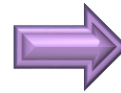
Customer	Attachments	Status	Email
PE0002	Invoice_2	Successful	peterston@construct.com
PE0002	Hygiene Doc Number Report	Successful	peterston@construct.com



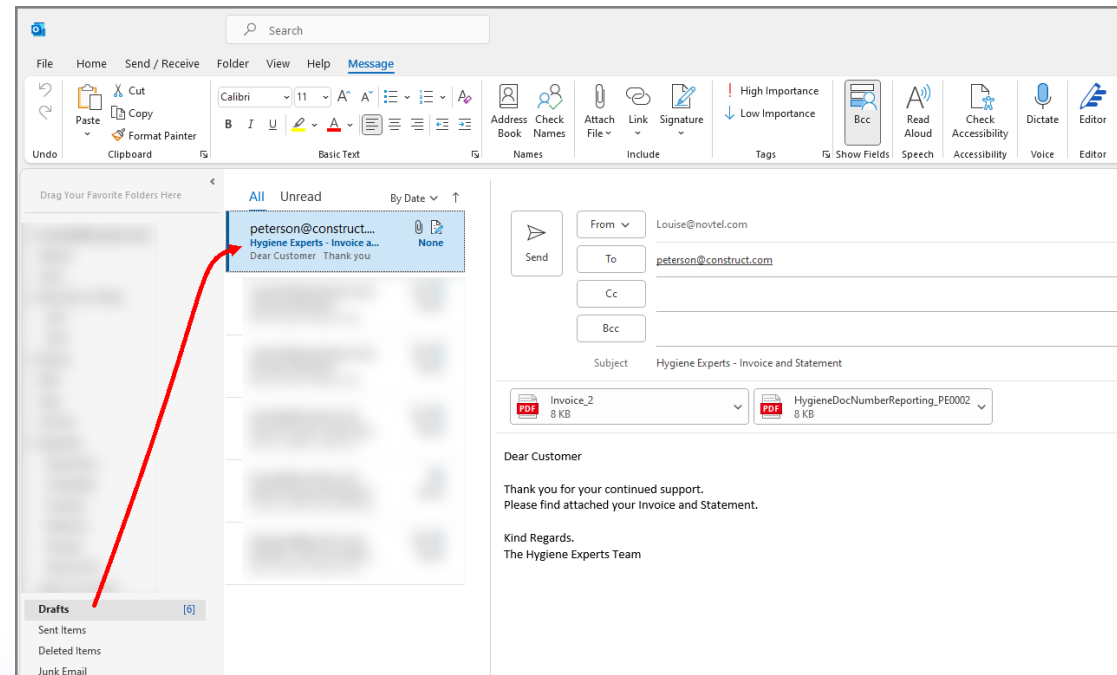
Setup Procedures

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.





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.

The screenshot shows the 'Setup Email' dialog box with the following settings:

- Message Options:**
 - Send Operation: Save Only To Drafts, Send Directly
 - Global Subject: 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
 - Documents to include: Statement Only, Invoices Only, Statement and Invoices, Include Hygiene Doc Number Reporting
 - Generate Report After Sending
- Attachment Options:**
 - Attachment 1 through Attachment 10: Each has an empty text field and a search icon.
 - Reset All Attachments: A button below the attachment fields.
- Invoice Layout:** A dropdown menu set to 'Logo Left'.
- Export Path:** A text field containing 'C:\Users\User\Desktop\Document Exports' with a search icon. Below it is the text '(Leave blank to use default export path)'.

Buttons at the bottom right: 'Accept' and 'Close'.



Property Management



Hospitality Management



Novtel
Equipment Hire



Relations Management



Self-Storage



Vehicle Hire



The Invoice Module and Job Tracker Utility

(For the Glass Cutting Industry)



Contract Management



Bank Manager



Access Control



Property Management Mobile Application

For Recording Maintenance
Onsite and In-yr. Cost



Relations Management Mobile App



The Invoicing App



The Online Application Website



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