



# STEPS TO **Mastering the Basics**

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EQUIPMENT HIRE  
(TOILET HIRE)

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# 1 Introduction

The purpose of this manual is to demonstrate the "**Toilet Hire**" part of Novtel Equipment Hire. Please register on Novtel's Forum at <http://www.novtel.com/forum/index.php> - free of charge - for more information.

Please note that the following must have been created before the rest can be set up as explained in this manual:

## 1. Users and Passwords

<http://www.novtel.com/forum/index.php?board=1243.0>

*The first User must be created without the activated Pastel Interface. Click on "Setup - Interfaces - Novtel", and after the first User was created, click on "Setup - Interfaces - Pastel", and select the path for Pastel*

## 2. Setup - Interfaces - Pastel

Make sure that all accounts have been entered, and that the Pastel path is correct

## 3. Opening a Shift for the User (Please note that no transactions can be done if this step was not completed)

<http://www.novtel.com/forum/index.php?board=1245.0>

## 4. Branches

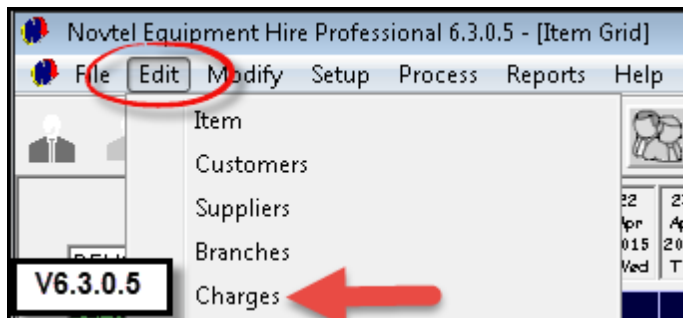
<http://www.novtel.com/forum/index.php?topic=1334.0>

For more information on POS Transactions and the Cash-Up Procedure, please download these manuals from our Forum:

- **Equipment Hire - 14 Steps to Mastering the Basics**  
<http://www.novtel.com/forum/index.php?topic=1474.0>
- **Equipment Hire (Containers) - 13 Steps to Mastering the Basics**  
<http://www.novtel.com/forum/index.php?topic=1496.0>
- **Equipment Hire (Point of Sale) - 7 Steps to Mastering the Basics**  
<http://www.novtel.com/forum/index.php?topic=1502.0>

## 2 Step 1 - Creating Charges

- These following 8 "**Charges**" must be created first, since it is used in the next step when the Company is set up:
  - WOR001 - Workshop Charge
  - POS001 - POS/Shop In-house Charge
  - POS002 - POS/Shop In-house Payout Charge
  - LAT001 - Late Return Charge
  - REP001 - Replacement Charge
  - REP002 - Repair Charge
  - HYG001 - Hygiene Service Charge
  - DEL001 - Delivery Charge
- Hygiene Consumables must be created as normal "**Charges**". These charges include:
  - Liquid Hand soap
  - Toilet paper
  - Air-Freshners
  - Sanitizers
  - Folded Paper Towels
- Hygiene Fixed items must also be created as "**Charges**" (Physical Items), which include:
  - Waste Paper Bins
  - Soap Dispensers
  - Toilet Roll Holders
  - Hot Air Dryers
  - Paper Towel Dispenser
- Click on "**Edit Charges - Add New**"

A screenshot of a dialog box for adding a new charge. It features a 'Sort By' dropdown set to 'Code' and a 'Search' text box. Below these are three input fields labeled 'Code', 'Description', and 'Charges'. At the bottom, there are four buttons: 'Add New' (circled in red), 'Edit', 'Delete', and 'Close'.

1. Enter the **"Code"** for the **"Charge"** - normally a three digit alpha code, and 3 digit numeric code
2. Enter the **"Description"** for the item
3. Tick the check-boxes to **"Create Item in Pastel"**, and **"Display on Invoice"**
4. Tick the **"Physical Item"** check-box, since this is a stock item that will be sold
5. In the **"General"** tab, select the option to **"Allow Tax"**, and set the default Tax percentage
6. Enter the cost price of the item - excluding tax
7. The **"Rate Incl"** amount, is the amount the Customer will pay. See how the **"Markup Percentage"** are entered automatically, as well as the **"Charge Excluding Vat"** amount
8. **"Inventory Categories"** are set up in Pastel, and can be selected in Novtel

**Add New Charge**

Code: SOA001 (1)

Description: Liquid Hand Soap 700ml refill (2)

Barcode:

External Reference:

☒ Create Item In Pastel (3)

☒ Display On Invoice (3)

☒ Physical Item (4)

☐ Blocked

**General** (circled)

Allow Tax: ☒ 1 - Vat - Standard rated (14%) (5)

Cost Price Excl: 15.00 (6)

Markup %: 163.13

Charge Incl: 45.00 (7)

Charge Excl: 39.47

User Defined Field 1:

User Defined Field 2:

User Defined Field 3:

User Defined Field 4:

User Defined Field 5:

Pastel Inventory Code:

Multi Store code for retrieving Cost Price:

Inventory Category: 001 - Hygiene Consumables (8, highlighted with red arrow)

000 - No category

002 - Toilet Roll Holders

003 - Hand Hygiene Dispensers

004 - Hand Dryers

005 - Waste Bins

006 - VIP Toilet Trailers

007 - VIP Shower/Toilet Combo

V6.3.0.3

- In the "**Properties**" tab - if your company has a retail shop - select "**POS Item**" as well as "**Shop Item**". (Notice that the "**Pastel Inventory Code**" has not been inserted yet)
- Click "**Accept**"

**Add New Charge**

Code:  ☒ Create Item In Pastel

Description:  ☒ Display On Invoice

Barcode:  ☒ Physical Item

External Reference:  ☐ Blocked

**General** | **Properties**

☒ POS Item ☒ Shop Item

☐ Payout Item

☐ Refundable Charge Item

☐ Maintenance Item

POS Category:

Pastel Inventory Code:

Multi Store code for retrieving Cost Price:

Inventory Category:

**V6.3.0.3**

- The item will now be imported to Pastel when this process has been completed. Select the "**Inventory Group**" that has been created in Pastel, and select "**Physical Item**"
- Click "**Accept**" in order for the process to be completed

Import Inventory Item

Code: HYG005

Description: Soap - 700ml refill

Inventory Group: 023 - Hygiene Consumables

Excl Selling Price: 39.47

☒ Physical Item  
☐ Service Item

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

Multi-Store Select

☒ All Multi-Stores  
☐ Selected Multi-Stores

V6.3.0.3

Accept Cancel

- Returning to the "Charge", the "Pastel Inventory Code" has been inserted

**Edit Charge**

Code: HYG005

Description: Soap - 700ml refill ☒ Display On Invoice

Barcode:  ☒ Physical Item

External Reference:  ☐ Blocked

**General** | Properties

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

Cost Price Excl: 15.00 Markup %: 163.13

Rate Incl: 45.00 Charge Excl: 39.47

User Defined Field 1:

User Defined Field 2:

User Defined Field 3:

User Defined Field 4:

User Defined Field 5:

**Pastel Inventory Code**: HYG005 Soap - 700ml refill

Multi Store code for retrieving Cost Price:

Inventory Category: 022 - Hygiene Consumables

**V6.3.0.3** Accept Cancel

- Enter all other "Charges" in the same manner (Remember that "Hygiene Service Charges" are to be setup for each "Item" to be serviced)

**Charge Setup** V6.3.0.5

Code	Description	Amount
INH001	POS/Shop Inhouse Charge	0.00
LAT001	Late Return Charge	0.00
PAP001	Paper Towel Barrel 50m	285.00
PAP002	Paper Towel Folded 500	400.00
PAY001	Pos/Shop Payout	0.00
REP003	Replacement Charge	0.00
REP004	Repair Charge	0.00
SER003	Service Charge for VIP Toilet Tra...	20.00
SER004	Service Charge VIP Shower/Toil...	40.00
SER005	Service Charge Econo 12 Toilet ...	40.00
SER006	Service Charge VIP Paraplegic T...	20.00
SER007	Service Charge Single Toilet Units	10.00
SER008	Service Charge for Showers	10.00

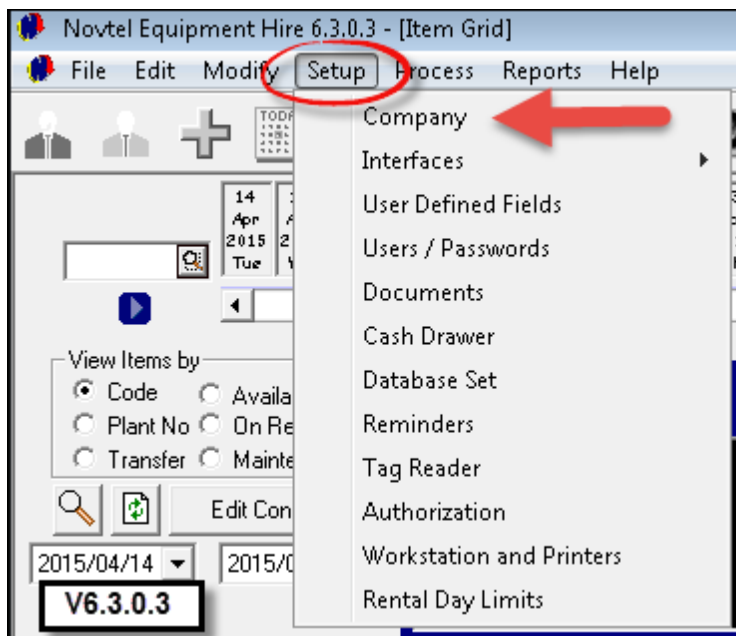


### 3 Step 2 - Setting up the Company

- Novtel Equipment Hire incorporates features to manage the following types of businesses - all in one package:
  - Equipment Hire (Whether it is for Tools; Heavy Machinery; Photography Equipment; Lighting or Sound Equipment)
  - Container Hire
  - Toilet Hire
  - Workshop Management
  - Point of Sale

Please refer to <http://www.novtel.com/forum/index.php?board=396.0> for guidance in setting up your company. However, the following specifically pertains to the "Toilet Hire / Hygiene" industry:

- Click on "**Setup - Company**"



- In the "**General Tab**", select whether or not "**Customers**" will be billed on Saturdays; Sundays and Public Holidays. (Click on "**Setup Holidays**" to enter all public holidays during the year). Tick the check-boxes to activate "**Weekly**" and "**Monthly**" rates if needed
- Select the option to "**Print Hygiene Slips**"

Company Setup

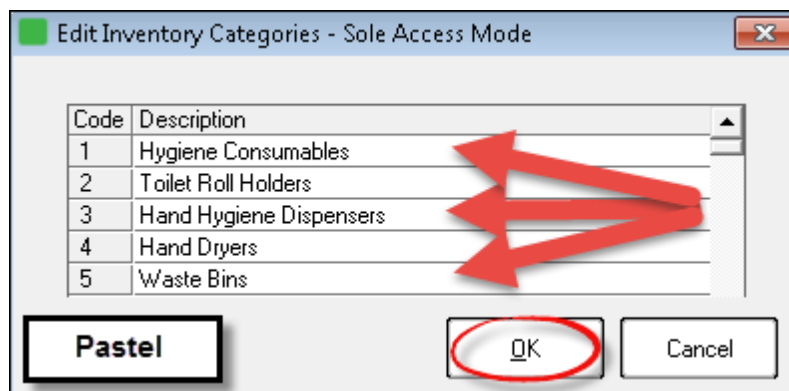
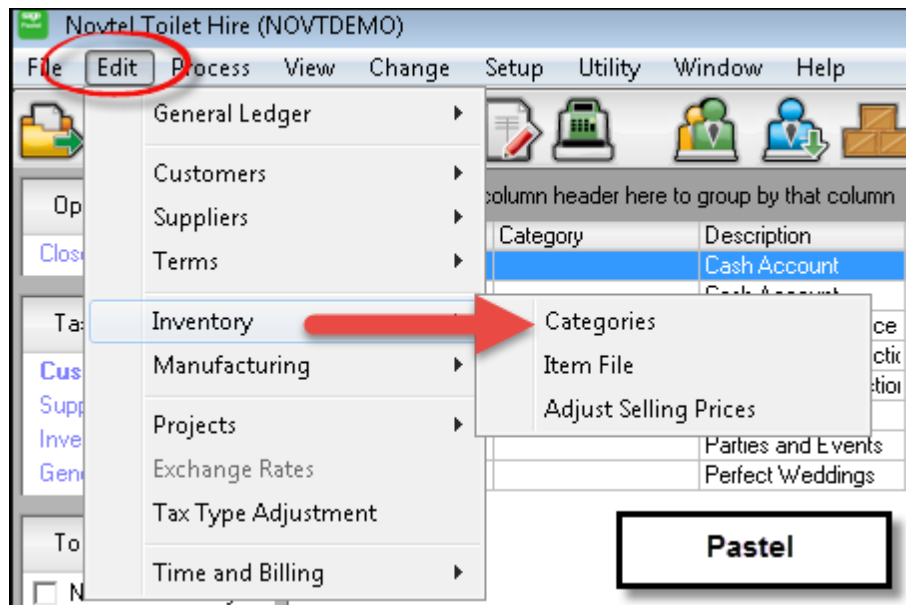
Company Details **General** Financial Preferences POS Images

Automatic Refresh Interval: 60 Seconds  
 Enter 0 to disable automatic refresh  
 Number of rows on Grid: 15  
 Number of columns on Grid: 45  
 Activate Monthly Billing: ☒ Yes ☐ No  
 Activate Access Control: ☐ Yes ☒ No  
 Activate Recurring Maintenance: ☐ Yes ☒ No  
 Force Agent Commission: ☐ Yes ☒ No  
 Default Return Time: 08:00:00  
 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  
 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: 0 day/s  
 Allow Grace Period of: 2 hour/s  
 Allow Backdated Return of: 0 day/s  
 Force Plant No. to Cost Code: ☐  
 Increment Hire Days on Sunday (Checked = Charge): ☒  
 Activate Sundays on Item Level: ☐  
 Increment Hire Days on Saturday (Checked = Charge): ☒  
 Charge Half Day on Saturday (Checked = Charge): ☐  
 Activate Saturdays on Item Level: ☐  
 Increment Hire Days on Public Holidays (Checked = Charge): ☒  
 Activate Holidays on Item Level: ☐  
 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 Recording: ☐  
 Print Hygiene Slips: ☒  
 Allow Contract Discount: ☐  
 Allow Item Remove (More than one day selected): ☒  
 Allow Multiple off-hire Days: ☐  
 Allow off-hire Daysselect on Provisional: ☐  
 Display End Date on Documents: ☐  
 Remove Customer Required Fields: ☐  
 Accept Cancel

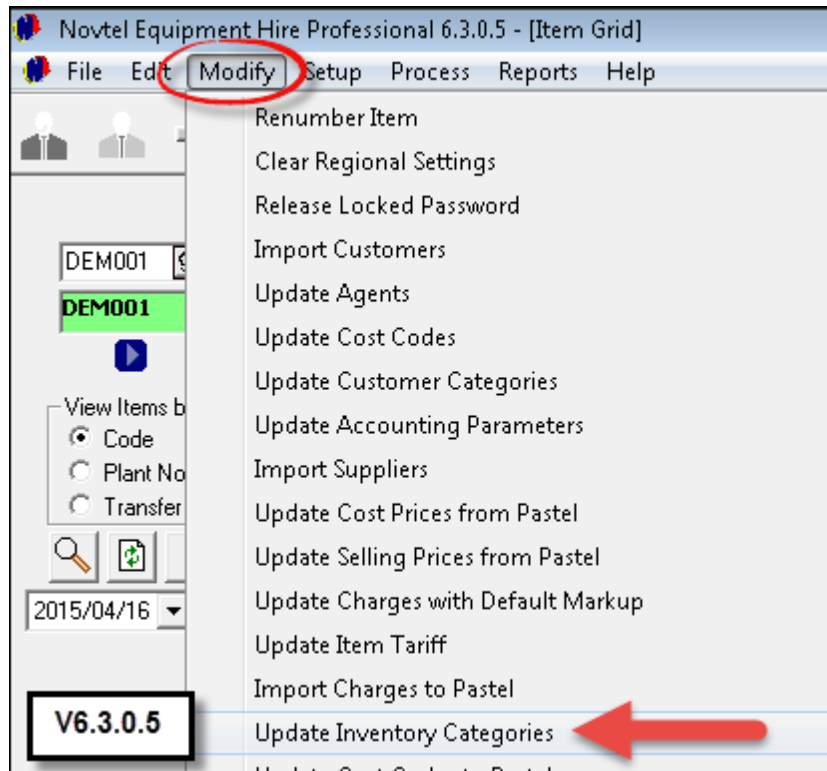
- Remember to enter all details in the other tabs as well

## 4 Step 3 - Creating Item Categories

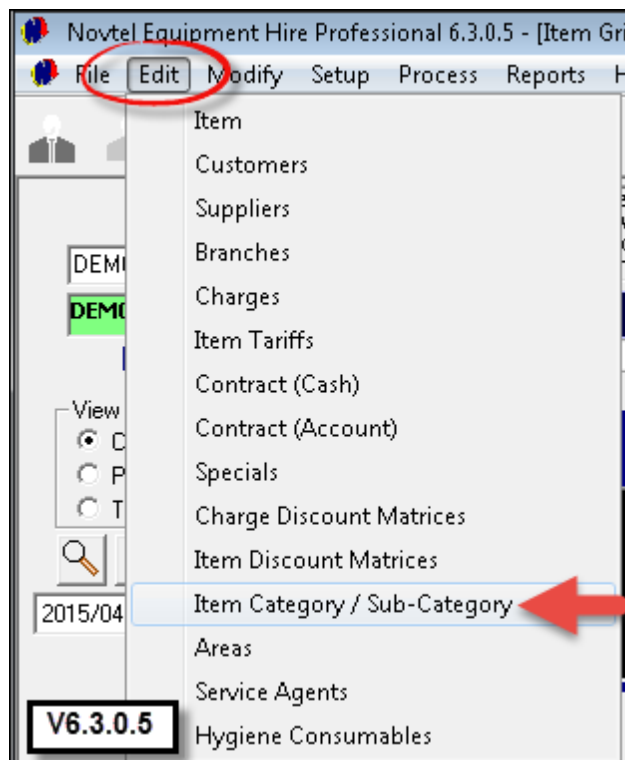
- All items in Toilet Hire must be categorized, and it is important to know that the "Items" itself will display on the Grid - once it has been created. The contracts for the rented "Items" will display next to the "Item" on the Grid. It is very important to plan all "Item Categories" and "Sub Categories" meticulously. If Novtel is integrated with Pastel, first create Inventory Categories in Pastel



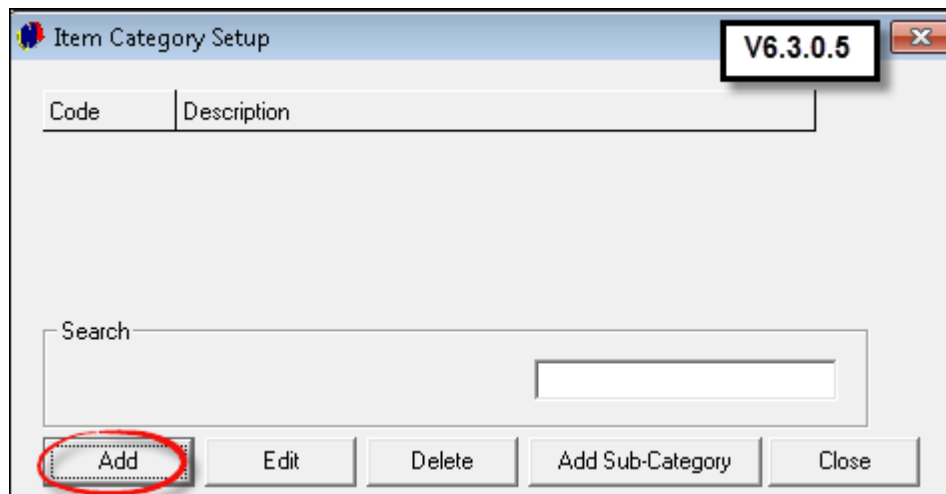
- In Novtel, update the Pastel Categories to Novtel in **"Modify - Update Inventory Categories"**, and click **"Yes"** to confirm the action



- In order to create **"Item Categories"** in Novtel, click on **"Edit - Item Category/Sub Category"**

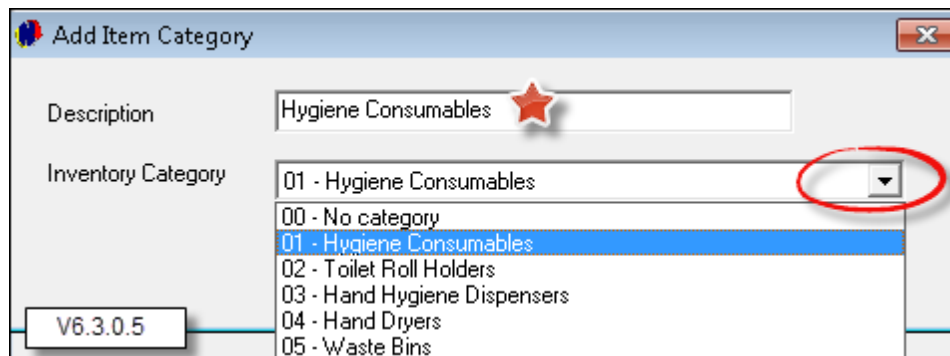


- Click on "Add"

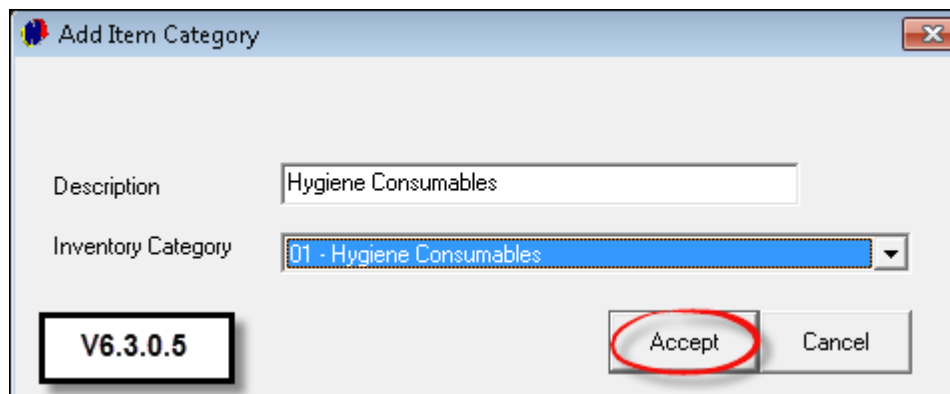


The "Item Category Setup" dialog box (V6.3.0.5) features a table with two columns: "Code" and "Description". Below the table is a search area with a "Search" label and an input field. At the bottom, there are five buttons: "Add", "Edit", "Delete", "Add Sub-Category", and "Close". The "Add" button is circled in red.

- Enter the description for the "Category"; Click on the drop-down arrow and select from the list the specific Pastel "Category" to be linked to Novtel's "Category"

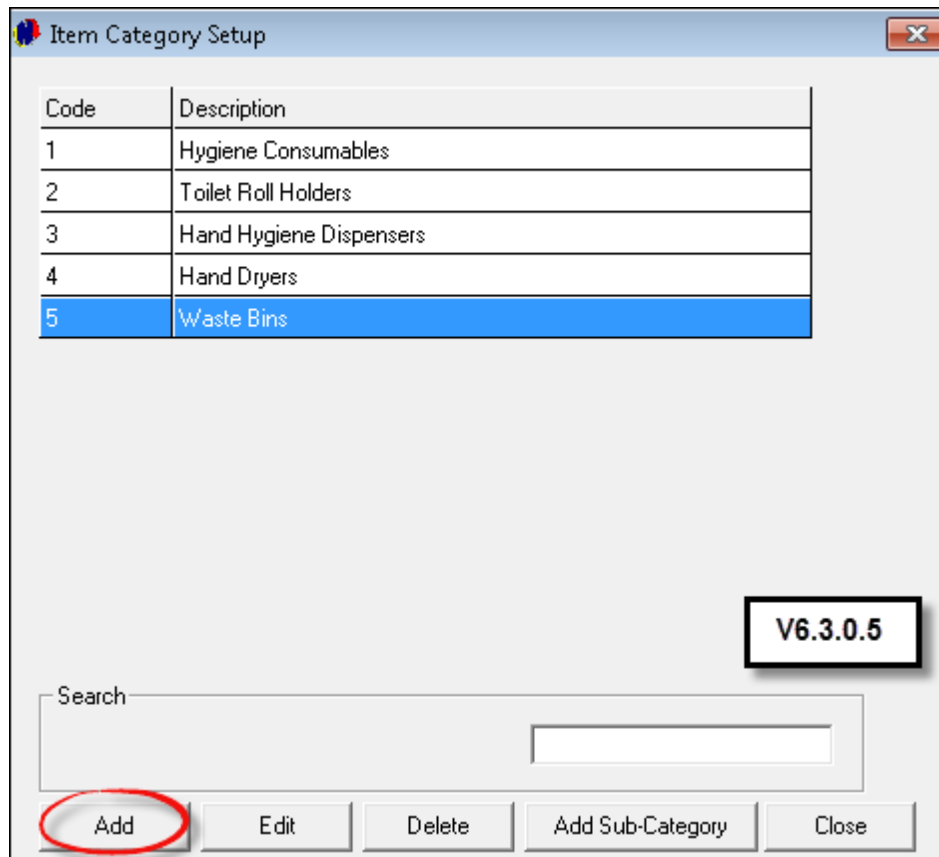


The "Add Item Category" dialog box (V6.3.0.5) shows the "Description" field filled with "Hygiene Consumables" and a red star icon. The "Inventory Category" field displays a list of options: "01 - Hygiene Consumables", "00 - No category", "01 - Hygiene Consumables", "02 - Toilet Roll Holders", "03 - Hand Hygiene Dispensers", "04 - Hand Dryers", and "05 - Waste Bins". The "01 - Hygiene Consumables" option is highlighted in blue. A red circle highlights the drop-down arrow on the right side of the "Inventory Category" field.



The "Add Item Category" dialog box (V6.3.0.5) shows the "Description" field filled with "Hygiene Consumables". The "Inventory Category" field now shows "01 - Hygiene Consumables" as the selected option. At the bottom, there are two buttons: "Accept" and "Cancel". The "Accept" button is circled in red.

- Click **"Add"** to create more **"Categories"**



Code	Description
1	Hygiene Consumables
2	Toilet Roll Holders
3	Hand Hygiene Dispensers
4	Hand Dryers
5	Waste Bins

Search

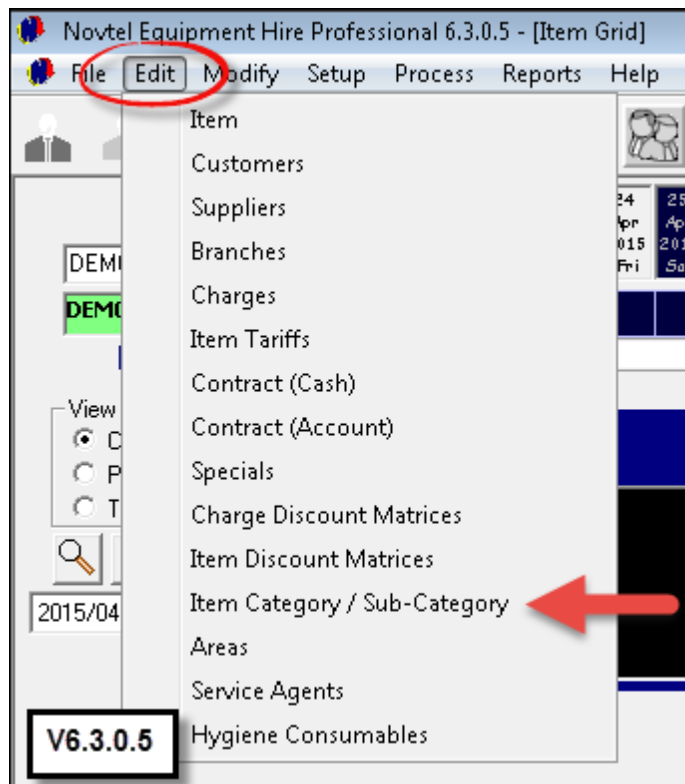
V6.3.0.5

Add Edit Delete Add Sub-Category Close

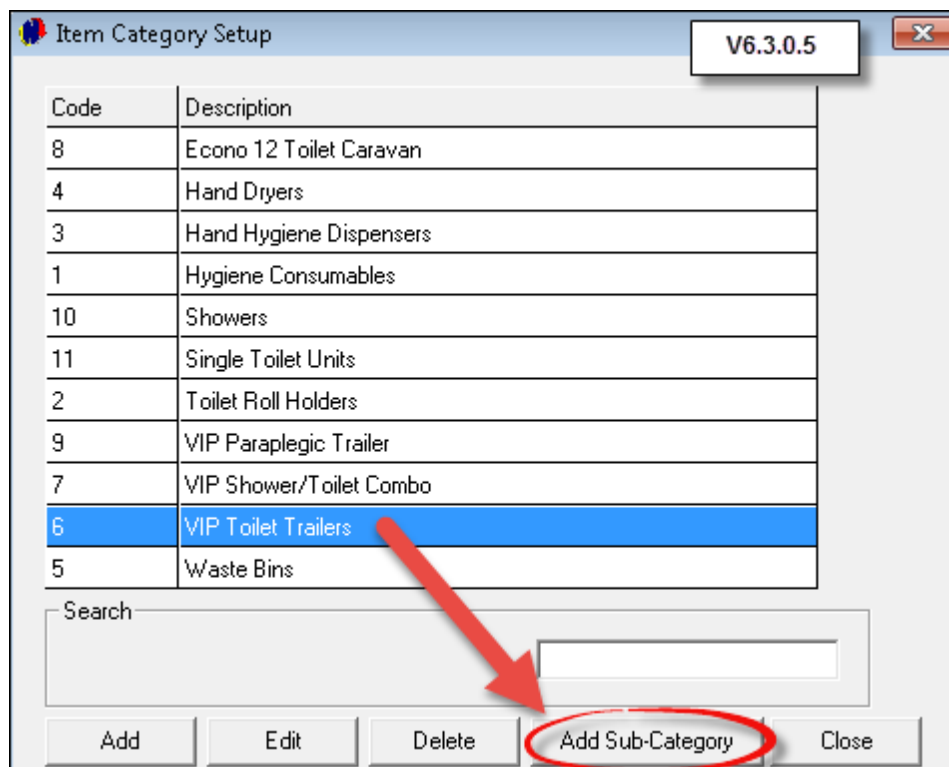
- Categories can also include the following:
  - VIP Toilet Trailers
  - VIP Shower/Toilet Combo
  - Econo 12 Toilet Caravan
  - VIP Paraplegic Toilet Trailers
  - Single Toilet Units
  - Showers

## 5 Step 4 - Creating Item Sub-Categories

- In order to create a **"Sub-Category"** (Items linked to the Main Category), click on **"Edit - Category/Sub Category"**



- In this case we will be adding items to the **"VIP Toilet Trailers"**. Click on it, and then on **"Add Sub-Category"**



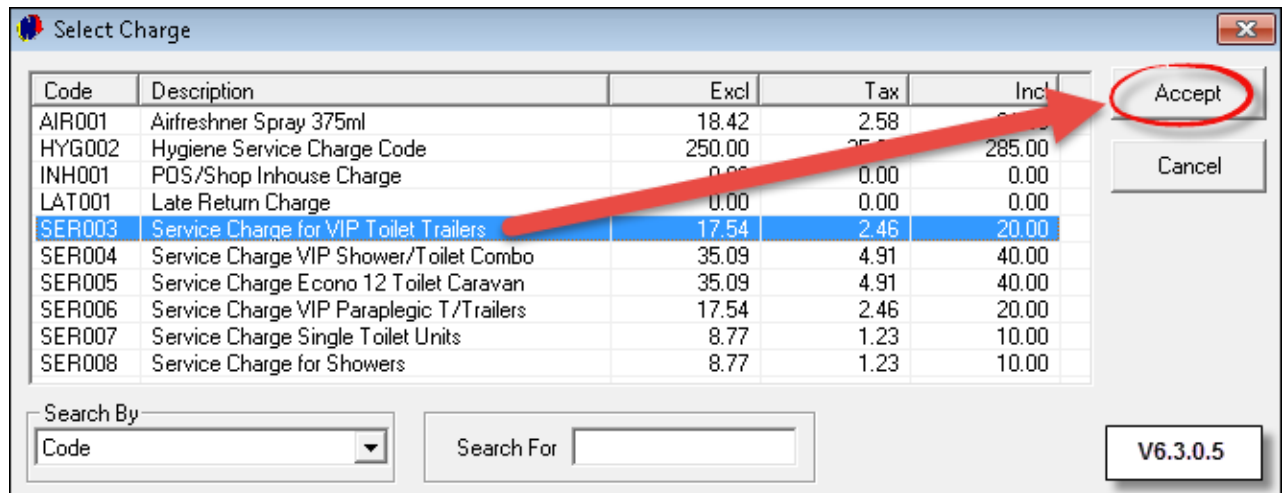
- Click on **"Add"**. Notice how the Main Category's code and description has automatically been entered at the top

- Enter the **"Description"** for the **"Sub Category"** - the item itself - and set the Tax rate
- Enter the charge rates on the **"Item"** per: Day / Week / Month / Hour / Service, and select the option to **"Update Price to Item"**
- Tick the check-boxes for the following if you want the items to be charged on:
  - Public Holiday (Remember that in **"Setup - Company – General"** tab, you have the option to set up Public Holidays in the system and either have it charged, or be excluded from billing)
  - Rain Day / Saturday / Half day on Saturday / Sunday / Monthly and Weekly Rates are also activated in **"Setup - Company – General"** tab, and the options will either be activated in the **"Sub-Category"** creation window - or not - according to the setup
- Tick the check-box to classify this **"Item"** as a **"Maintenance Item"**. If the **"Item"** is to be serviced daily, enter the numeric value of 1 in the **"Service Every"** field, and enter the **"Unit"** as **"Days"**
- Tick the check-box to **"Update Default to Item"**
- Click on the magnifying glass beneath **"Hygiene Service Charge Code"**

	Including	TAX	Excluding
Price Per Day	114.00	14.00	100.00
Price Per Week	684.00	84.00	600.00
Price Per Month	2508.00	308.00	2200.00
Price Per Hour	0.00	0.00	0.00
Price Per Service	20.00	2.46	17.54



- Select the specific "**Service Charge**" for this "**Sub-Category**" from the list, and click "**Accept**"



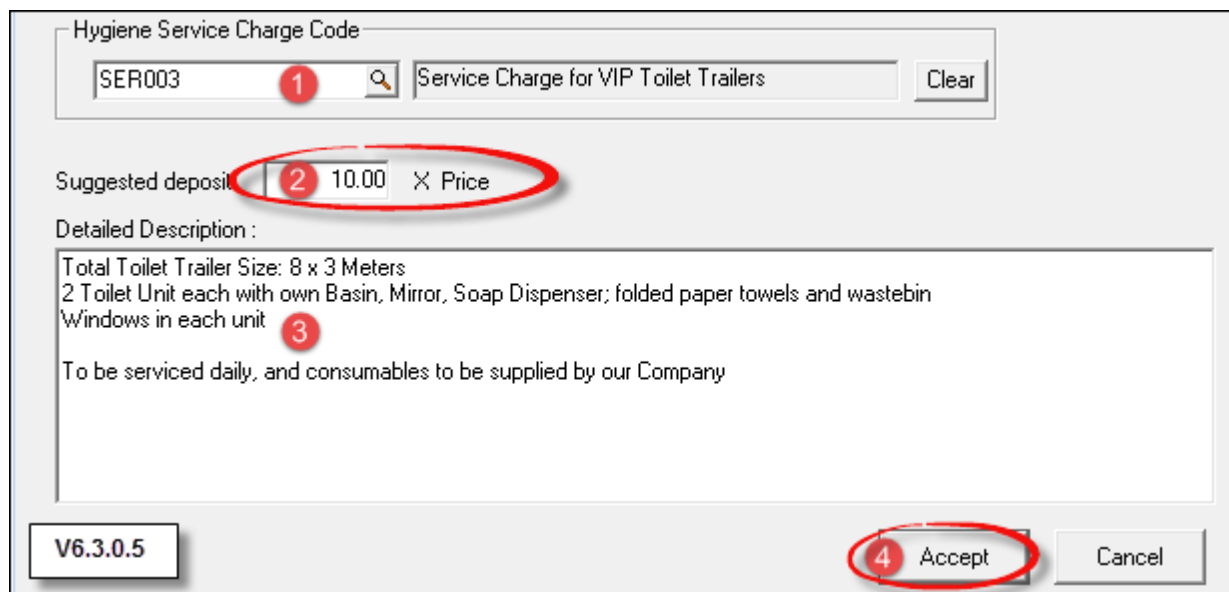
Code	Description	Excl	Tax	Incl
AIR001	Airfreshner Spray 375ml	18.42	2.58	20.00
HYG002	Hygiene Service Charge Code	250.00	25.00	285.00
INH001	POS/Shop Inhouse Charge	0.00	0.00	0.00
LAT001	Late Return Charge	0.00	0.00	0.00
SER003	Service Charge for VIP Toilet Trailers	17.54	2.46	20.00
SER004	Service Charge VIP Shower/Toilet Combo	35.09	4.91	40.00
SER005	Service Charge Econo 12 Toilet Caravan	35.09	4.91	40.00
SER006	Service Charge VIP Paraplegic T/Trailers	17.54	2.46	20.00
SER007	Service Charge Single Toilet Units	8.77	1.23	10.00
SER008	Service Charge for Showers	8.77	1.23	10.00

Search By: Code

Search For:

V6.3.0.5

1. The "**Charge Code and Description**" has been entered
2. Deposits are payable on "**Items**" when it is first rented. Enter the "**Suggested Deposit**" - this will be a numeric value times the rental price - for instance: 10 days' rent @ R342.00. In reality, the "**Suggested Deposit**" amount will then display as R3420.00 when a deposit is raised in the contract form
3. A detailed description on the "**Item**" are to be added in the field provided
4. Click "**Accept**" to save the "**Sub-Category**"



Hygiene Service Charge Code

SER003 Service Charge for VIP Toilet Trailers Clear

Suggested deposit: 10.00 X Price

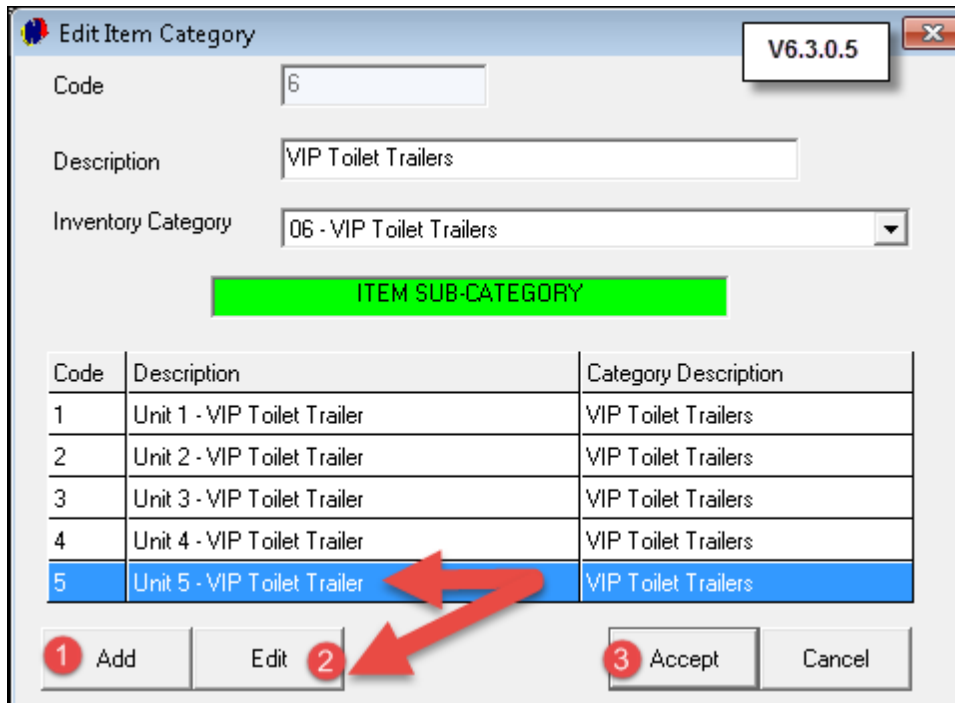
Detailed Description :

Total Toilet Trailer Size: 8 x 3 Meters  
 2 Toilet Unit each with own Basin, Mirror, Soap Dispenser; folded paper towels and wastebin  
 Windows in each unit  
 To be serviced daily, and consumables to be supplied by our Company

V6.3.0.5

Accept Cancel

1. To enter the next **"Sub-Category"** to this **"Item Category"**, click **"Add"**
2. Should changes be necessary to any of the **"Sub-Categories"**, click on it and then on **"Edit"**. Make the changes and click **"Accept"**
3. In order to exit the current **"Sub-Category"** setup window, click **"Accept"**



**Edit Item Category** V6.3.0.5

Code: 6

Description: VIP Toilet Trailers

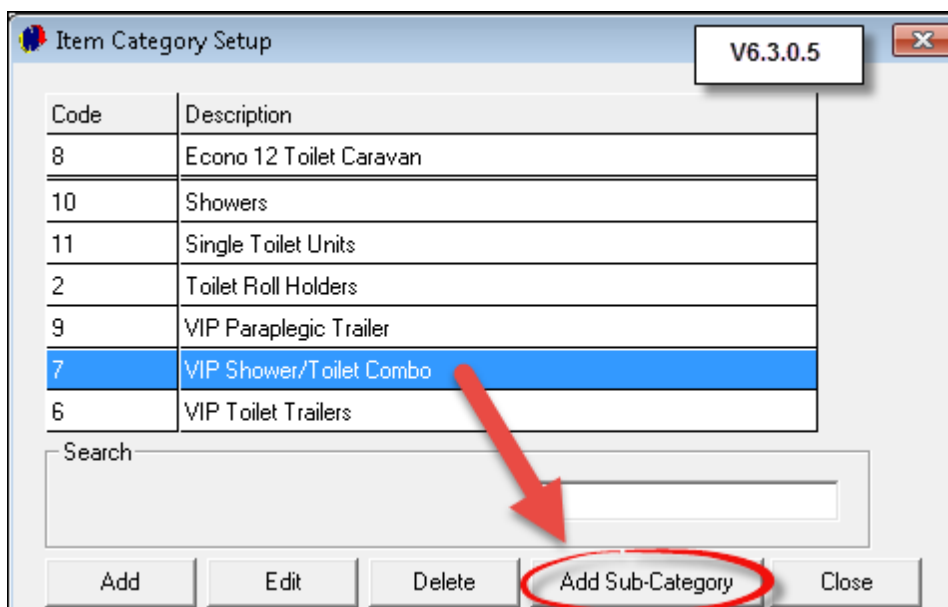
Inventory Category: 06 - VIP Toilet Trailers

**ITEM SUB-CATEGORY**

Code	Description	Category Description
1	Unit 1 - VIP Toilet Trailer	VIP Toilet Trailers
2	Unit 2 - VIP Toilet Trailer	VIP Toilet Trailers
3	Unit 3 - VIP Toilet Trailer	VIP Toilet Trailers
4	Unit 4 - VIP Toilet Trailer	VIP Toilet Trailers
5	Unit 5 - VIP Toilet Trailer	VIP Toilet Trailers

Buttons: 1 Add, Edit, 2, 3 Accept, Cancel

- Click on the next **"Item Category"** and select **"Add Sub-Category"** to create these within the main **"Category"**



**Item Category Setup** V6.3.0.5

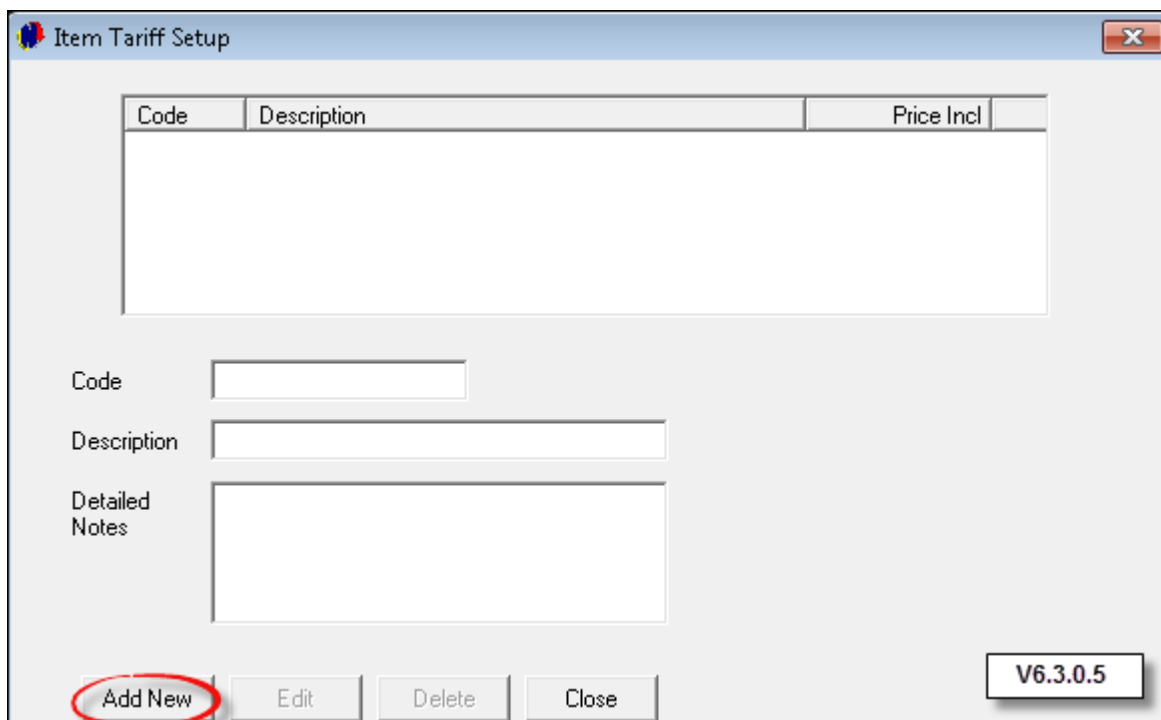
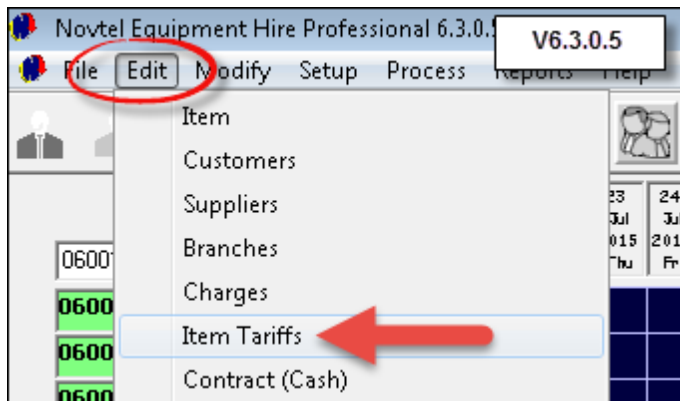
Code	Description
8	Econo 12 Toilet Caravan
10	Showers
11	Single Toilet Units
2	Toilet Roll Holders
9	VIP Paraplegic Trailer
7	VIP Shower/Toilet Combo
6	VIP Toilet Trailers

Search: \_\_\_\_\_

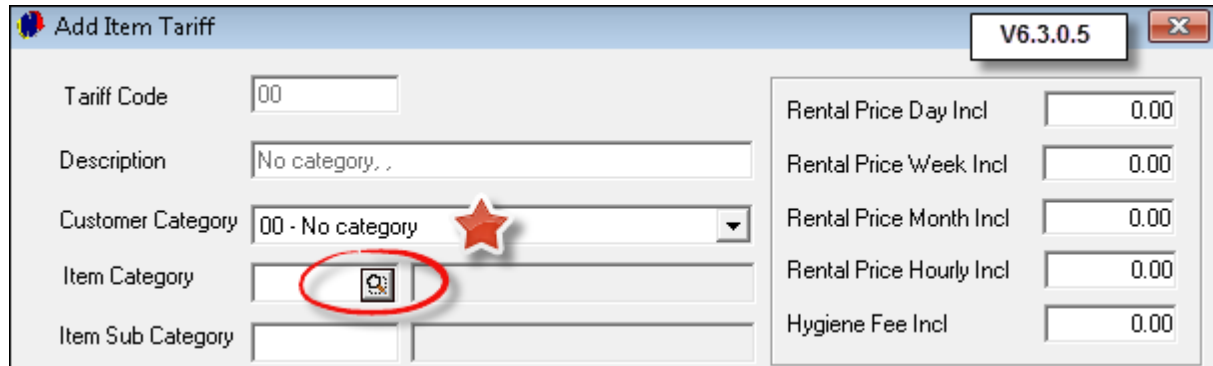
Buttons: Add, Edit, Delete, Add Sub-Category, Close

## 6 Step 5 - Creating Item Tariffs

- The prices setup for each "**Sub-Category**", must now also be set up as an "**Item Tariff**". These "**Item Tariffs**" will then be linked to the "**Item**" itself - which will be created in the next step. Please note that "**Hygiene Service Management**" will not function if this step was not completed
- Click on "**Edit - Item Tariffs - Add New**"



- **"Customer Categories"** are setup in Pastel and selected in Novtel. In this case, no **"Customer Categories"** were set up
- **"Item Tariffs"** are linked to a **"Category and Sub-Category"**. Click on the magnifying glass next to **"Item Category"**




**Add Item Tariff** V6.3.0.5

Tariff Code: 00

Description: No category, .

Customer Category: 00 - No category

Item Category: 

Item Sub Category:

Rental Price Day Incl: 0.00

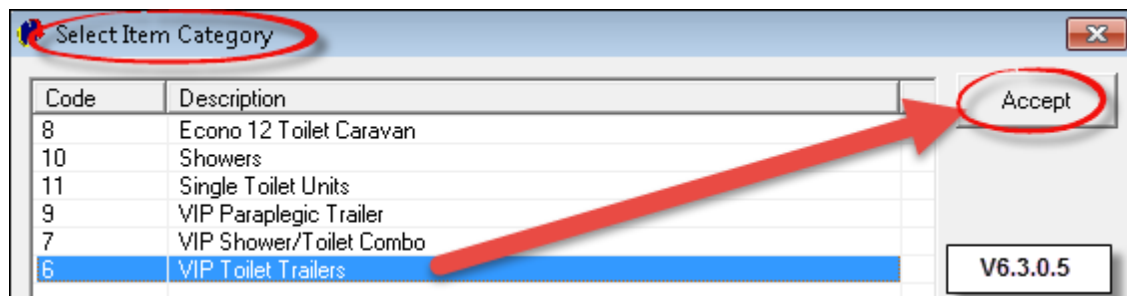
Rental Price Week Incl: 0.00

Rental Price Month Incl: 0.00

Rental Price Hourly Incl: 0.00

Hygiene Fee Incl: 0.00

- Select the **"Item Category"** from the list and click **"Accept"**



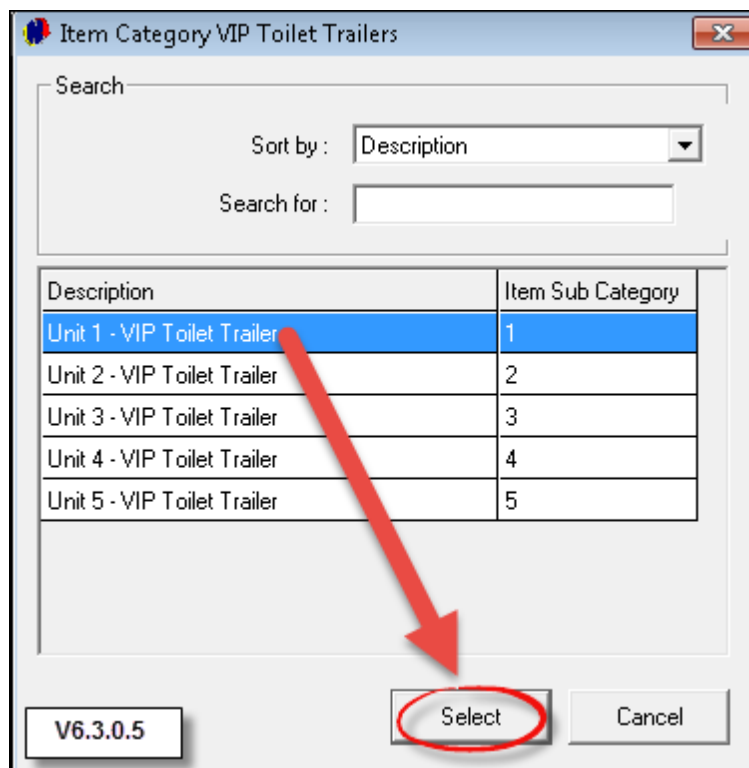
**Select Item Category**

Code	Description
8	Econo 12 Toilet Caravan
10	Showers
11	Single Toilet Units
9	VIP Paraplegic Trailer
7	VIP Shower/Toilet Combo
6	VIP Toilet Trailers

Accept

V6.3.0.5

- The **"Sub-Categories"** window will open immediately - displaying all the **"Sub-Categories"** connected to the main **"Category"**. Click on the first **"Sub-Category"** and then **"Select"**



**Item Category VIP Toilet Trailers**

Search:

Sort by: Description

Search for:

Description	Item Sub Category
Unit 1 - VIP Toilet Trailer	1
Unit 2 - VIP Toilet Trailer	2
Unit 3 - VIP Toilet Trailer	3
Unit 4 - VIP Toilet Trailer	4
Unit 5 - VIP Toilet Trailer	5

Select

Cancel

V6.3.0.5

- Enter the "**Rental Price Per Day / Week / Month / Hour Including Tax**", as well as the "**Hygiene Fee Including Tax**". This fee will be added to the contract automatically when the "**Item's Service**" is updated in the "**Hygiene Service Management**" window
- Enter the applicable "**Detailed Notes**" in the field provided, and click "**Accept**"

**Add Item Tariff**


Tariff Code: 0006001


Description: No category, VIP Toilet Trailers, Unit 1 - VIP Toilet T


Customer Category: 00 - No category


Item Category: 6 VIP Toilet Trailers


Item Sub Category: 1 Unit 1 - VIP Toilet Trailer


Detailed Notes: 

Rental Price Day Incl:  114.00

Rental Price Week Incl:  684.00

Rental Price Month Incl:  2508.00

Rental Price Hourly Incl:  0.00












Hygiene Fee Incl:  20.00

V6.3.0.5

**Accept** Cancel

- Create an "**Item Tariff**" for every "**Sub-Category**" in the system

**Item Tariff Setup**

Code	Description	Price Incl
0006001	No category, VIP Toilet Trailers, Unit 1 - VIP Toilet Trailer	114.00
0006002	No category, VIP Toilet Trailers, Unit 2 - VIP Toilet Trailer	114.00
0006003	No category, VIP Toilet Trailers, Unit 3 - VIP Toilet Trailer	114.00
0006004	No category, VIP Toilet Trailers, Unit 4 - VIP Toilet Trailer	 114.00
0006005	No category, VIP Toilet Trailers, Unit 5 - VIP Toilet Trailer	 114.00
0007001	No category, VIP Shower/Toilet Combo, Unit 1 - Toilet ...	 228.00
0007002	No category, VIP Shower/Toilet Combo, Unit 2 - Toilet ...	 228.00
0007003	No category, VIP Shower/Toilet Combo, Unit 3 - Toilet ...	 228.00
0008001	No category, Econo 12 Toilet Caravan, Unit 1 - 12 Toil...	 342.00
0008002	No category, Econo 12 Toilet Caravan, Unit 2 - 12 Toil...	 342.00
0009001	No category, VIP Paraplegic Trailer, Unit 1 - Paraplegic...	 171.00
0009002	No category, VIP Paraplegic Trailer, Unit 2 - Paraplegic...	 171.00
0009003	No category, VIP Paraplegic Trailer, Unit 3 - Paraplegic...	 171.00
0010001	No category, Showers, Unit 1 - Shower	 228.00
0010002	No category, Showers, Unit 2 - Shower	228.00
0010003	No category, Showers, Unit 3 - Shower	228.00

Code: 0006001

Description: No category, VIP Toilet Trailers, Unit 1

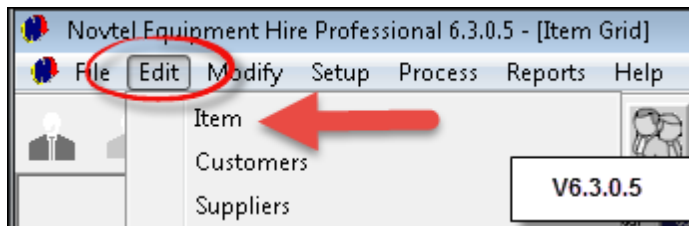
Detailed Notes:

**Add New** Edit Delete Close

V6.3.0.5

## 7 Step 6 - Creating Items

- Before any "Item" can be added to the system, the following **MUST** have been created already:
  - Branches
  - Item Categories
  - Sub-Categories
  - Item Tariffs
- Please note that if the Pastel Multi-Stores are in use, the "User" must run "Import Charges to Pastel" from the "Modify Menu" after creating any new items. "Items" are linked to an "Item Category" and "Sub-Category", therefore we need to create the specific "Items" that have been created as "Sub-Categories"
- Click on "Edit – Item - Add New"



Code	Description	Charge	Plant Number

Code:

Item Tariff:

Plant Number:

Cost Price:

Rental per day (Excl):

Tax:

Rental per day (Incl):

Search By:

Search For:

Description:

Branch: ☐

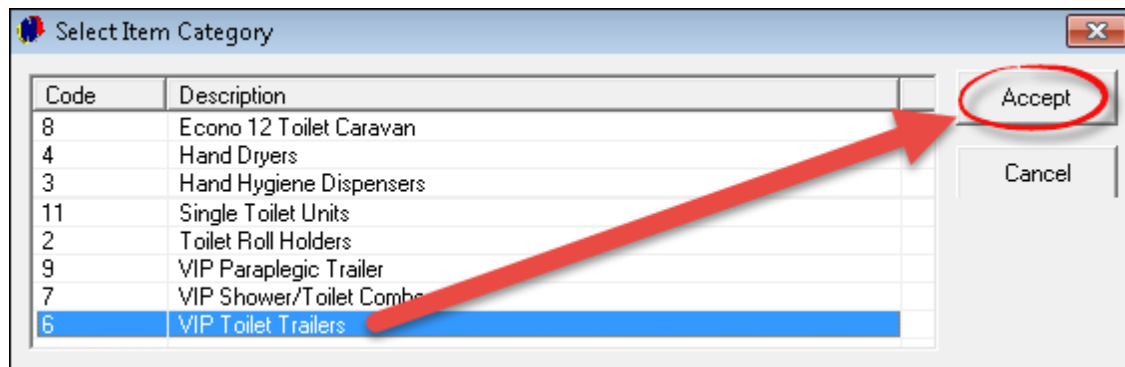
1. There is no need to enter an "Item Code" – the system will generate it. The system also generates the description according to the information that is entered for the "Sub-Category," "Manufacturer" and "Plant Number". See how the description changes with each of the above entries
2. Tick the check-box to "Create Item in Pastel". If the option is not selected, the "Item" will have to be created in Pastel manually
3. In the "General Tab", select the "Branch" to which this "Item" is added ("Items" for each "Branch" must be added separately).
4. The "Plant Number" is allocated by the company, and is unique to the "Item". When this number is entered, it is displayed in the "Description" field
5. Tick the check-box to "Show on Grid". After the Pastel Import has taken place, the "Item" will be displayed on the Grid, and contracts are created for the rent of these "Items" - which will be displayed next to it on the Grid

The screenshot shows the 'Add New Item' window. The 'Code' field is empty. The 'Description' field contains '1'. The 'Create Item In Pastel' checkbox is checked. The 'General' tab is selected. The 'Branch' dropdown is set to 'Mossel Bay, Mossel Bay'. The 'Plant Number' field contains '1'. The 'Show On Grid' checkbox is checked. Red arrows and numbers 1 through 5 indicate the sequence of steps for creating the item.

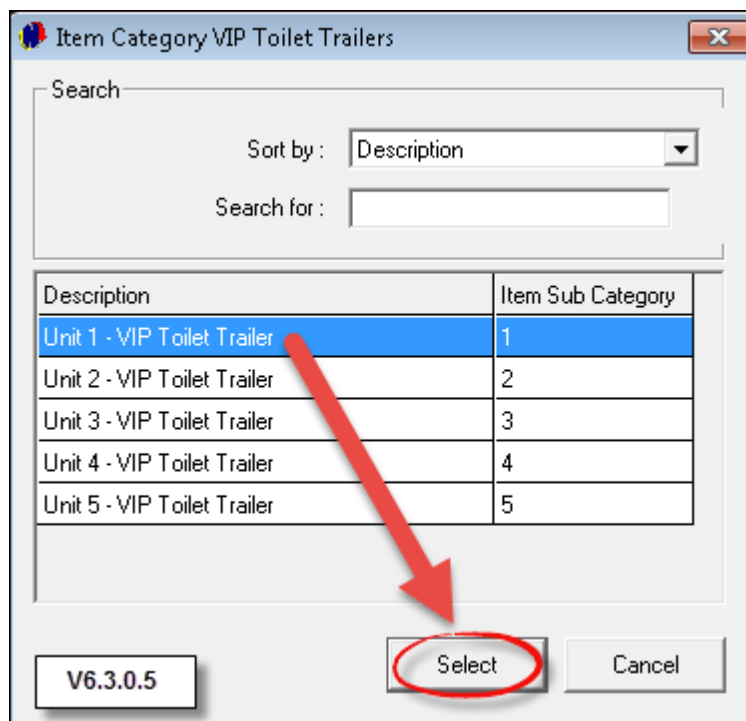
1. A unique manufacturer "Serial Number" must be entered for each "Item" in order to keep track of all "Items" owned by the Company, and in order to make sure that the correct "Item" is returned
2. Enter the "External Reference" for this "Item" (Supplier's Reference for the "Item" on invoice)
3. Enter the "Manufacturer" of the "Item". This has now been entered in the "Description" field with the "Plant Number"
4. Select "Hygiene" as the product "Type"
5. Click on the magnifying glass next to "Item Category"

The screenshot shows the 'Add New Item' window. The 'Code' field is empty. The 'Description' field contains 'Blue-Loo, 1'. The 'Create Item In Pastel' checkbox is checked. The 'General' tab is selected. The 'Branch' dropdown is set to 'Mossel Bay, Mossel Bay'. The 'Plant Number' field contains '1'. The 'Serial Number' field contains '111222333'. The 'External Reference' field contains 'VIPTT'. The 'Manufacturer' field contains 'Blue-Loo'. The 'Type' dropdown is set to 'Hygiene'. The 'Item Category' field contains '0'. The 'Show On Grid' checkbox is checked. The 'Subhire Item' checkbox is unchecked. The 'Monthly Billed Item' checkbox is unchecked. The 'Maintenance Item' checkbox is checked. The 'Rain Day/Off-Hire Item' checkbox is unchecked. Red arrows and numbers 1 through 5 indicate the sequence of steps for creating the item.

- Browse for the "Item Category" this "Item" will report to – in this case it is the "VIP Toilet Trailers". Click "Accept" to insert it



- The "Sub-Category" window for "VIP Toilet Trailers" will open – select "Unit 1 - VIP Toilet Trailer" and click "Select"





1. Notice how the **"Item's Description"** has now been changed since the **"Sub-Category"** has been inserted
2. The **"In Stock"** and **"Available"** fields will ALWAYS be set at the numeric value of 1. The **"On Rent"** field will be 0
3. Leave the **"Monthly Billed Item"** check-box un-ticked
4. **"Rain Day/Off Hire Days"** will not be charged on such days if the option is selected
5. Tick the check-boxes if this **"Item"** is to be charged on Saturdays and Sundays, or **"Half Day on Saturday"**
6. Leave the **"Charge Weekly Rate"** check-box blank

**Add New Item**

Code:

Description:

☒ Create Item In Pastel

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

Branch: ☒ Mossel Bay, Mossel Bay

Plant Number:

Serial Number:

External Reference:

Manufacturer:

Type:

Item Category:   VIP Toilet Trailers

Item Sub Category:  Unit 1 - VIP Toilet Trailer

In Stock:

On Rent:

Available:

Home Branch: ☒ Mossel Bay, Mossel Bay

Show On Grid: ☒

Subhire Item: ☐

Monthly Billed Item: ☐

Maintenance Item: ☒

Rain Day/Off-Hire Item: ☐

Charge on Sunday: ☒

Charge on Saturday: ☒

Saturday Half Day: ☐

Charge Weekly Rate: ☐

V6.3.0.5

Accept Cancel

1. In the **"Details"** tab, there are three main fields where information can be entered. The first being the **"General Details"** field, which is exclusively used for information pertaining to the **"Toilet Trailers"**. The **"Tyre and Spare Tyre Make"** can be entered, as well as the **"License Due"** date
2. The **"Service Interval"** field is mostly used for heavy machinery and power tools where maintenance must occur every certain amount of rental days, in order to keep the **"Items"** in good working order. It is not applicable in Toilet Hire
3. Enter the **"Item's Detailed Description"**. For Example:
  - 2 Partitioned Toilets - each with own basin, mirror, waste bin, soap dispenser and folded paper towel dispenser
  - Fresh Water Tank
  - 2 x 600x400mm top hung windows
  - Mechanics Compartment
  - 2 x Mud Guards
  - 2 x Folded Down Steps

**Add New Item**

Code:

Description:

☒ Create Item In Pastel

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

**General Details** 1

Tyres Make:

Spare Tyre Make:

Battery Make:

License Due:

Date Sold:

**Service Interval** 2

Current Rental Days:

First Maintenance:  RD

Recurring Interval:  RD

Next Maintenance:  RD

RD - Rental Days

Detailed Description of Item

2 Partitioned Toilets - each with own basin, mirror, waste bin, soap dispenser and folded paper towel dispenser.  
 Fresh Water Tank  
 2 x 600x400mm top hung windows  
 Mechanics Compartment  
 2 x Mud Guards  
 2 x Folded Down Steps

V6.3.0.5

Accept Cancel

- Proceed to the **"Financial Tab"**, and enter the **"Item's Cost Price"** – the purchase price when it was bought
- The Rental Price per Day / Week and Month and Service has already been entered as it was set up in the **"Sub-Category"**
- Select the standard Tax rate
- The **"Per Day"** tariff has been selected for this **"Item"** since the **"Monthly or Weekly Billed Item"** check-boxes was not ticked in the **"General"** tab

**Edit Item**

Code: 06001001

Description: Unit 1 - VIP Toilet Trailer , Blue Loo, 1

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

Cost Price: ★ 120000.00

	Per Day	Per Week	Per Month	Per Hour	Per Service
Rental Excl Tax	★ 100.00	★ 600.00	★ 2200.00	0.00	★ 17.54
Tax	14.00	84.00	308.00	0.00	2.46
Rental Incl Tax	114.00	684.00	2508.00	0.00	20.00

V6.3.0.5

1 - Vat - Standard rated (14%)

☒ Per Day ☐ Per Hour

- In **"Setup – User Defined Fields - Items"**, five additional information fields can be created, and that information can be entered in the **"Item's User Defined Fields"** tab

**Add New Item**

Code:

☒ Create Item In Pastel

Description: Unit 1 - VIP Toilet Trailer , Blue Loo, 1

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

User Defined Field 1:

User Defined Field 2:

User Defined Field 3:

User Defined Field 4:

User Defined Field 5:

V6.3.0.5

- The "Pastel" tab will not reflect the "Item's Pastel Inventory and Cost Codes" yet. Also notice that the "Item Code" has not been created
- Click "Accept" to save the "Item"

1. In the "Import Inventory Item" window, the "Item's Code" has now been created, and the "Description" has been entered automatically
2. Click on the arrow next to the "Inventory Group", and select "Services"
3. The daily rate is entered as the "Excluding Selling Price"
4. Select "Service Item", since this "Item" will not be sold, but rented to numerous "Customers" over the period of a few years
5. Tick the check-box to "Create Cost Code". The system will automatically enter the code and description
6. If the "Pastel Multi-Store" module has been installed on your computer and the "Multi-Stores" have been set up, the specific "Store" can be selected. If not, the "Default Store" will automatically be selected
7. Click "Accept" to complete the importing process

- In order to return to the "Item" to view the "Pastel Interface" tab, click on the "Item" and then "Edit"

**Item Setup**

Code	Description	Charge	Plant Number
06001001	Unit 1 - VIP Toilet Trailer , Blue Loo,	114.00	1

Code: 06001001  
 Item Tariff:   
 Plant Number: 1  
 Auto Create

Cost Price: 120000.00  
 Rental per day (Excl): 100.00  
 Tax: 14.00  
 Rental per day (Incl): 114.00

Search  
 Search By: Plant Number  
 Search For:   
 V6.3.0.5

Description: Unit 1 - VIP Toilet Trailer , Blue Loo,  
 Branch: ☒ Mossel Bay, Mossel Bay

Add New Edit Delete Close

- The "Pastel Inventory and Cost Codes" have been entered, as well as the "Item Code"

**Edit Item**

Code: 06001001 ★  
 Description: Unit 1 - VIP Toilet Trailer , Blue Loo, 1

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

Pastel Inventory Code: 06001001 ★ Unit 1 - VIP Toilet Trailer , Blue Loo, Clear

Pastel Cost Code: 1 ★ Unit 1 - VIP Toilet Trailer , Clear

Accept Cancel

- Viewing the Grid, the first "Item" created is displayed

V6.3.0.5

11 Jul 2015 Sat	12 Jul 2015 Sun	13 Jul 2015 Mon	14 Jul 2015 Tue	15 Jul 2015 Wed	16 Jul 2015 Thu	17 Jul 2015 Fri	18 Jul 2015 Sat	19 Jul 2015 Sun	20 Jul 2015 Mon	21 Jul 2015 Tue	22 Jul 2015 Wed	23 Jul 2015 Thu
06001001												

1. In order to create more "Items", click on "Edit - Item - Add New"
2. To make changes to an "Item", click on it and then on "Edit". Make the changes and click "Accept"
3. "Items" can only be deleted if it was not previously linked to contracts

**Item Setup**

Code	Description	Charge	Plant Number
06001001	Unit 1 - VIP Toilet Trailer, Blue Loo,	114.00	1
06002001	Unit 2 - VIP Toilet Trailer, Blue Loo,	114.00	1
06003001	Unit 3 - VIP Toilet Trailer, Blue Loo, 1	114.00	1
06004001	Unit 4 - VIP Toilet Trailer, Blue Loo, 1	114.00	1
06005001	Unit 5 - VIP Toilet Trailer, Blue Loo, 1	114.00	1
07001001	Unit 1 - Toilet / Shower Combo, Blue Loo	228.00	2
07002001	Unit 2 - Toilet / Shower Combo, Blue Loo	228.00	2
07003001	Unit 3 - Toilet / Shower Combo, Blue Loo	114.00	2
08001001	Unit 1 - 12 Toilets, Blue Loo, 3	342.00	3
08002001	Unit 2 - 12 Toilets, Blue Loo, 3	342.00	3
08003001	Unit 3 - 12 Toilets, Blue loo, 3	342.00	3
09001001	Unit 1 - Paraplegic Trailer, Blue Loo, 4	171.00	4
09002001	Unit 2 - Paraplegic Trailer, Blue loo, 4	171.00	4
09003001	Unit 3 - Paraplegic Trailer, Blue Loo, 4	171.00	4
11001001	Unit 1 - Single Toilet, Blue Loo, 5	57.00	5

Code: 09002001      Cost Price: 200000.00

Item Tariff:      Rental per day (Excl): 150.00

Plant Number: 4      Tax: 21.00

Auto Create      Rental per day (Incl): 171.00

Search By: Plant Number

Search For:      **V6.3.0.5**

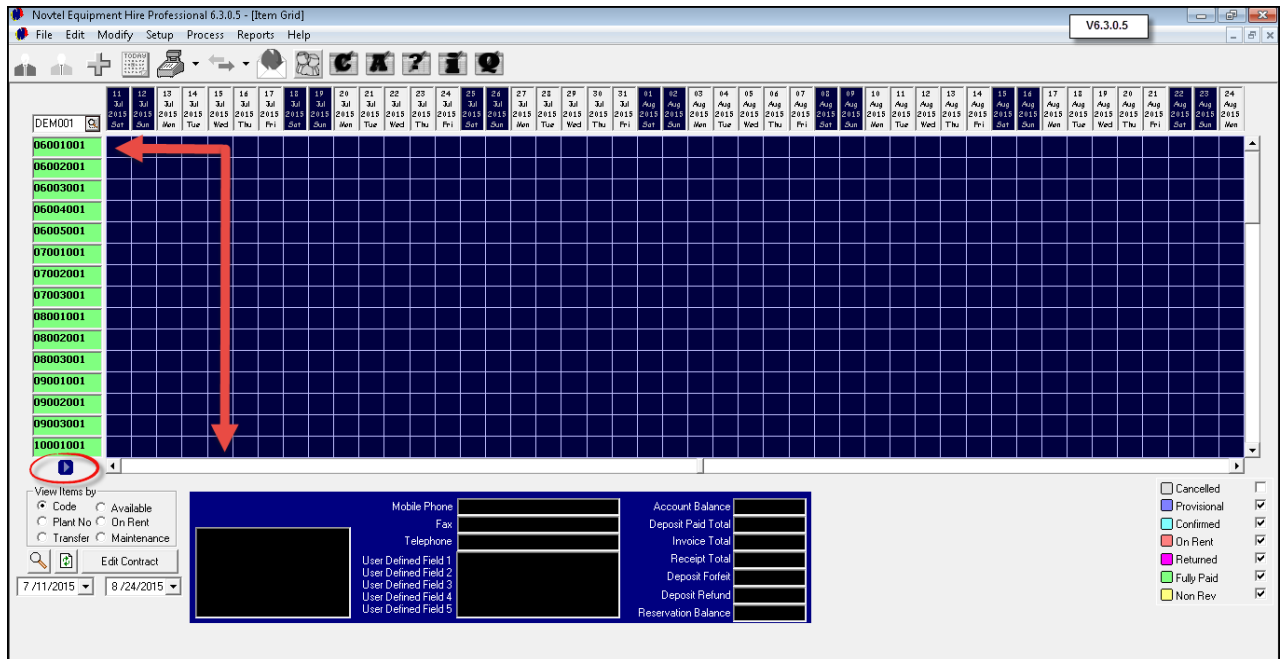
Description: Unit 2 - Paraplegic Trailer, Blue loo, 4

Branch: ☒ Mossel Bay, ☐ Middel Bay

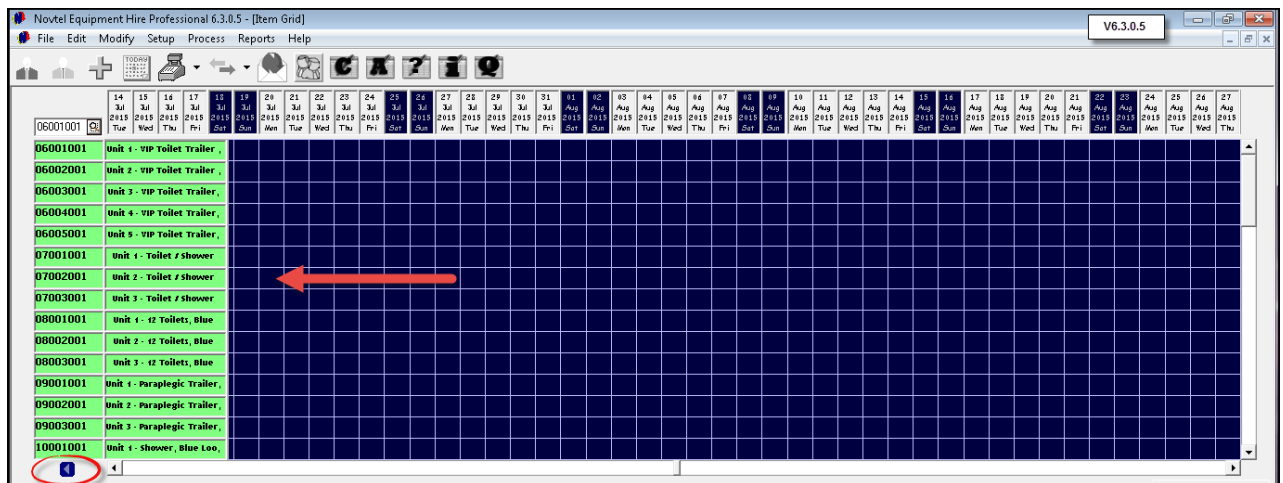
1 Add New      2 Edit      3 Delete      Close

- Click "Close" to exit the window

- All "Items" created will now display on the Grid. In order to view the "Description" for the "Items", click on the arrow pointing to the right - directly beneath the "Item Codes" on the Grid



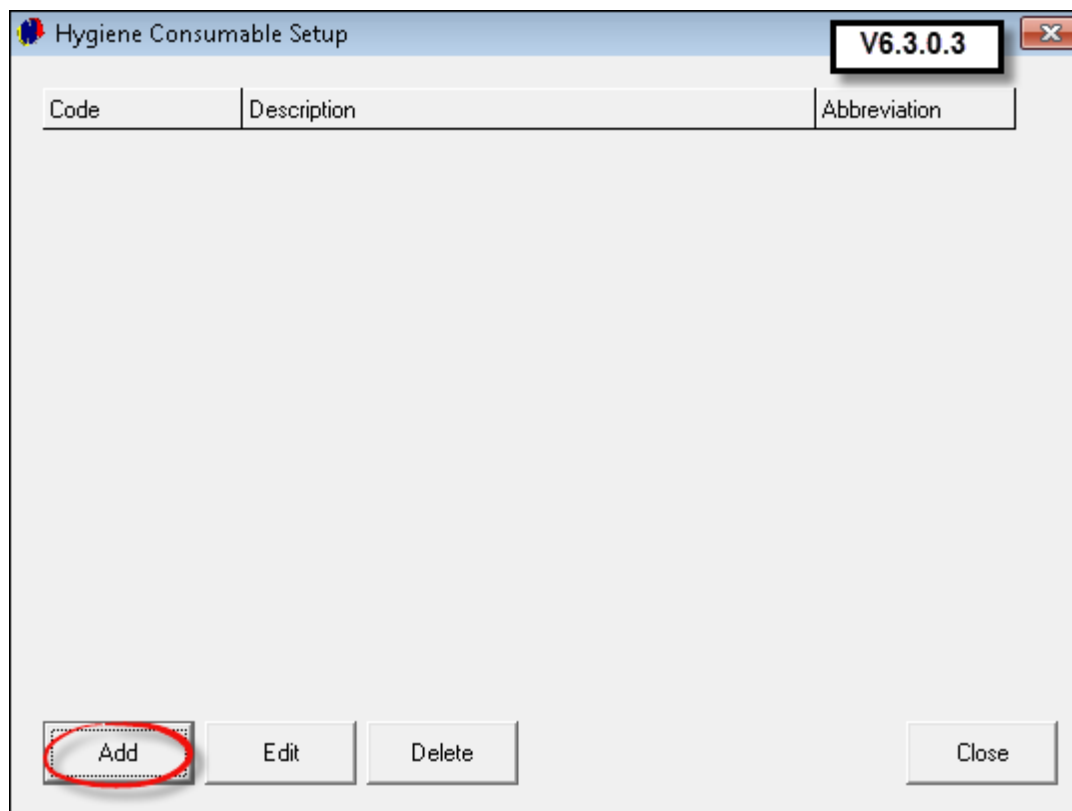
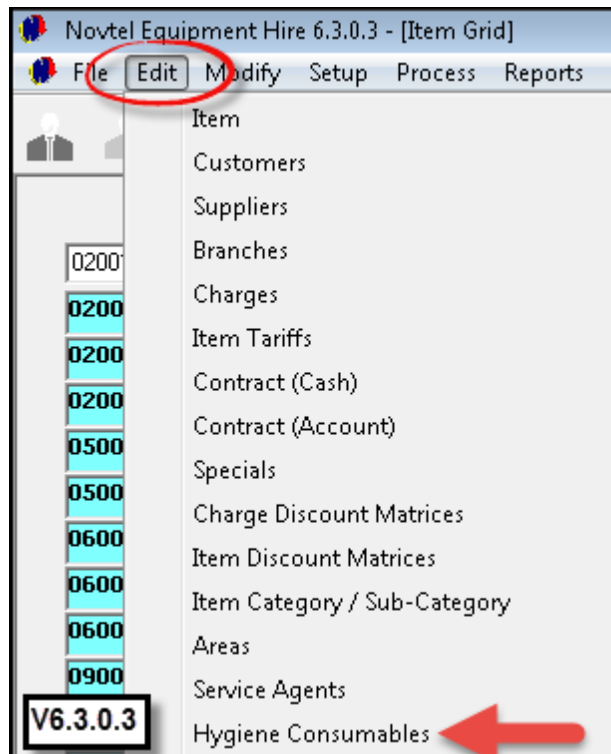
- To hide the "Item Descriptions", click on the arrow again - now pointing to the left



## 8 Step 7 - Creating Hygiene Consumables

"Hygiene Consumables" must have been created as "Charges" before you can proceed with this step


- Click on "Edit – Hygiene Consumables - Add"





- Click on the magnifying glass next to “Code” to open the “Charges” window

Add Hygiene Consumable

Code   Abbreviation

Description

Accept Cancel

V6.3.0.3

- Browse for, and click on the appropriate “Charge” that has been created for this purpose – then click “Accept”

Select Charge

Code	Description	Excl	Tax	Incl
HYG001	Hygiene Service Charge	0.00	0.00	0.00
HYG002	Soap Dispenser 1L Stainless Steel	263.16	38.84	300.00
HYG003	Soap Dispenser Automatic	613.16	85.84	699.00
HYG004	Soap Refill - 1L Anti-Bacterial	43.86	6.14	50.00
HYG005	Soap - 700ml refill	39.47	5.53	45.00
HYG006	Hot Air Dryer White 2.5kw	1535.09	214.91	1750.00
HYG007	Hot Air Dryer Stainless Steel 2.5kw	3333.33	466.67	3800.00
HYG008	Paper Towel Dispenser - Manual	1052.63	147.37	1200.00
HYG010	Paper Towel - Barrel	285.09	39.91	325.00
HYG011	Paper Towel - Folded	328.95	46.05	375.00
HYG012	Waste Paper Bin - Standard White	368.42	51.58	420.00
HYG013	Waste Paper Bin - Stainless Steel	526.32	73.68	600.00
HYG014	Toilet Paper Holder - 2 Rolls - White	140.35	19.65	160.00
HYG015	Toilet Paper Holder - 3 Rolls White	307.02	42.98	350.00
HYG016	Toilet Paper 1 Ply - Per Roll	2.63	0.37	3.00
HYG017	Toilet Paper 2 Ply - Per Roll	4.39	0.61	5.00
LAT001	Late Return Charge	43.86	6.14	50.00
NUT001	Hex Nut 20pc	17.54	2.46	20.00
NUT002	Wing Nuts 20pc	17.54	2.46	20.00
NUT003	Cap Nuts 20pc	17.54	2.46	20.00
POS001	POS/Shop In-house Charge	0.00	0.00	0.00
POS002	POS/Shop In-house Payout Charge	0.00	0.00	0.00
REP001	Replacement Charge	0.00	0.00	0.00
REP002	Repair Charge	0.00	0.00	0.00
SCR001	Stanley 10 Piece Screwdriver Set	174.56	24.44	199.00

Accept Cancel

Search By  Code

Search For

V6.3.0.3

- The “**Code**” is now inserted, and the “**Description**” has been entered automatically. Enter an “**Abbreviation**” for the specific “**Hygiene Consumable**”, and click “**Accept**” to save this “**Hygiene Consumable**”

Add Hygiene Consumable

Code: HYG004    Abbreviation: SOAP

Description: Soap Refill - 1L Anti-Bacterial

Accept    Cancel

V6.3.0.3

- Click on “**Add**” to enter more “**Hygiene Consumable Items**” from the “**Charges**” window
- In order to make changes to an item, click on it and then on “**Edit**”. Make the changes, and click “**Accept**”

Hygiene Consumable Setup

V6.3.0.3

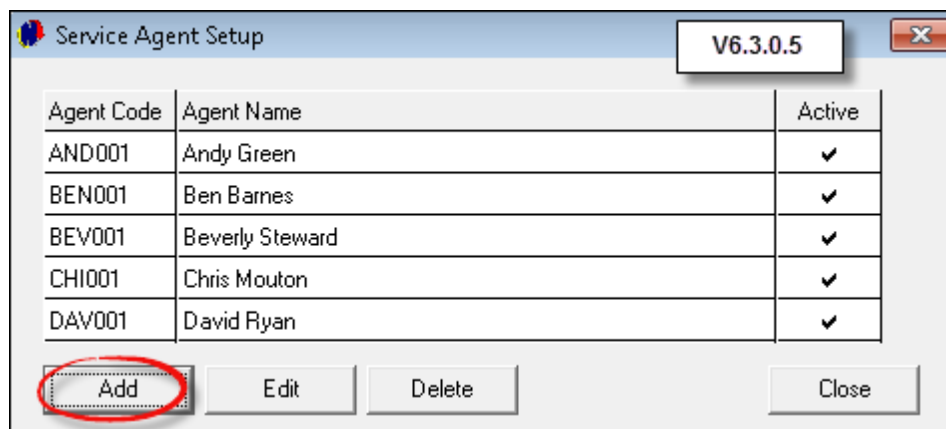
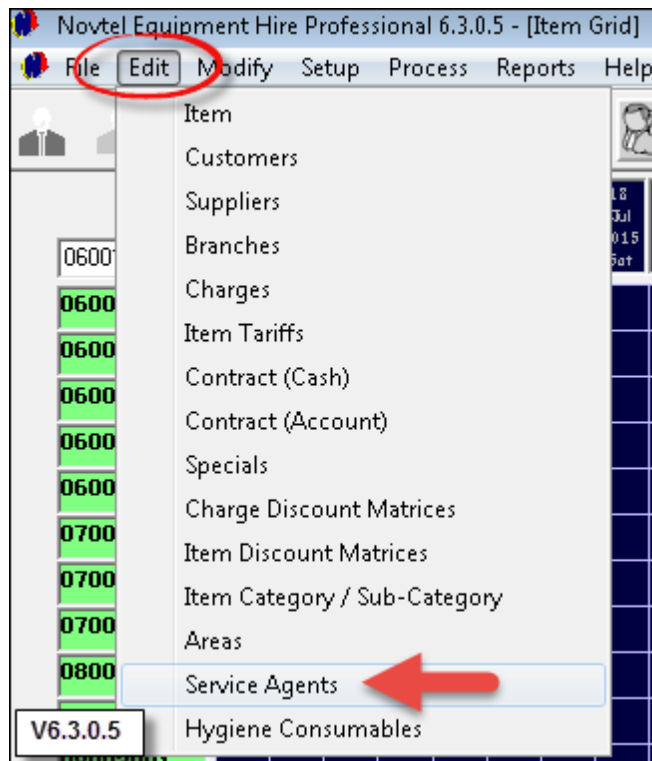
Code	Description	Abbreviation
HYG004	Soap Refill - 1L Anti-Bacterial	Soap
HYG005	Soap - 700ml refill	Soap
HYG010	Paper Towel - Barrel	Towel
HYG011	Paper Towel - Folded	Towel
HYG016	Toilet Paper 1 Ply - Per Roll	TP1
HYG017	Toilet Paper 2 Ply - Per Roll	TP2

Add    Edit    Delete    Close

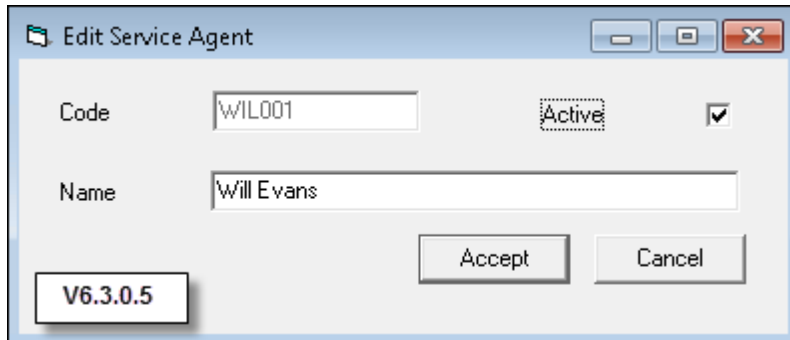
- Follow the same steps in order to “**Delete**” an item in this window
- To exit the window, click “**Close**”

## 9 Step 8 - Creating Service Agents and Areas

- **"Service Agents"** are the company's personnel who are servicing and maintaining the **"Items"** at different sites. In order to create these individuals, click on **"Edit - Service Agents - Add"**



- Enter the "**Code**" for this person, as well as their name and surname
- Tick the check-box to mark him as "**Active**", and click "**Accept**" to save them to the system



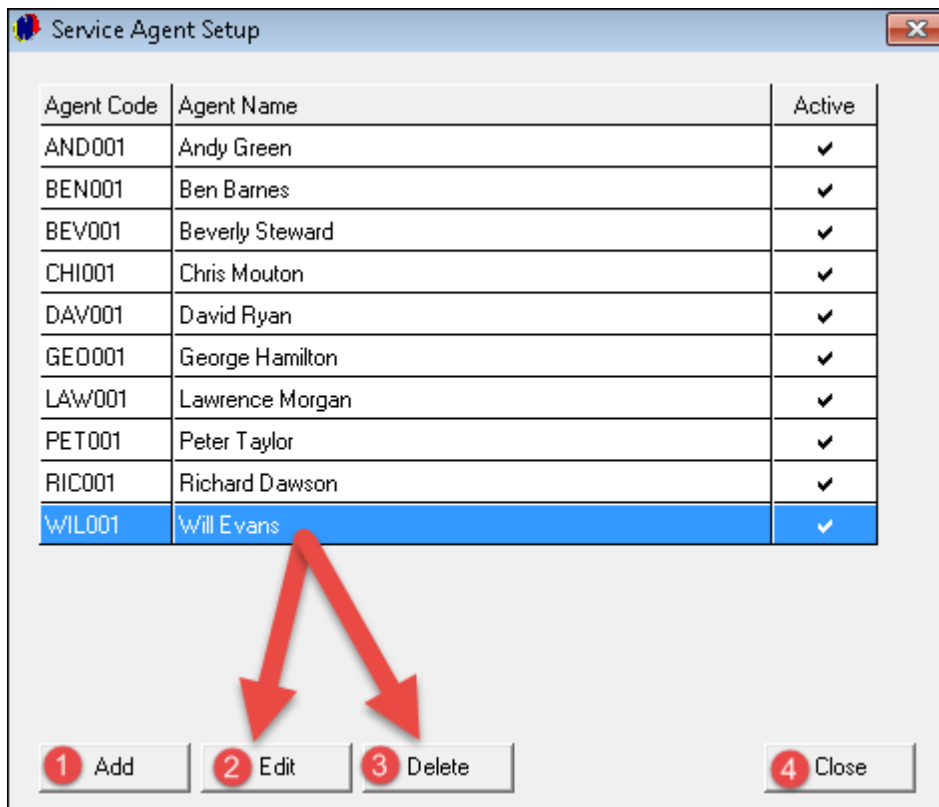
Code: WIL001    Active: ☒

Name: Will Evans

Accept    Cancel

V6.3.0.5

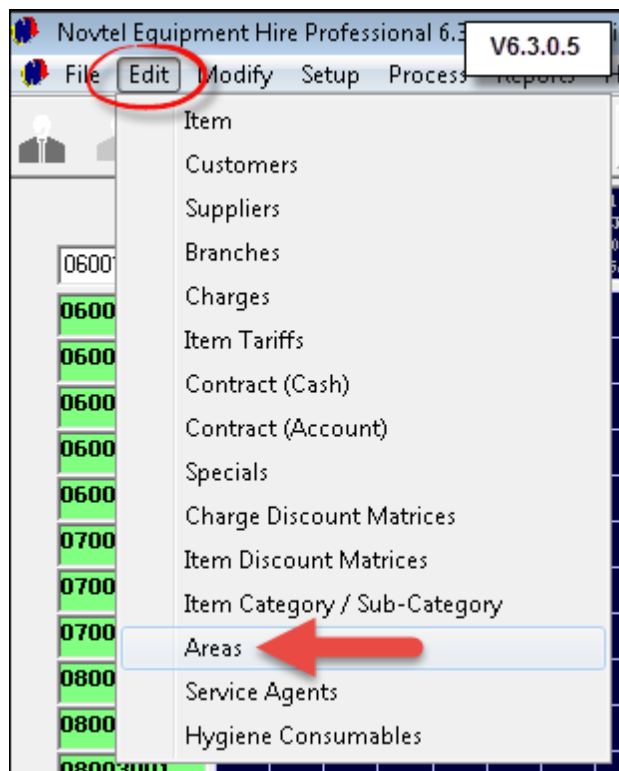
1. Repeat the steps to "**Add**" all other "**Service Agents**"
2. In order to make changes to the "**Service Agent**", click on the name and then on "**Edit**"
3. To remove an "**Agent**" from the system, click on the name and then "**Delete**"
4. When all "**Service Agents**" are created, click "**Close**"



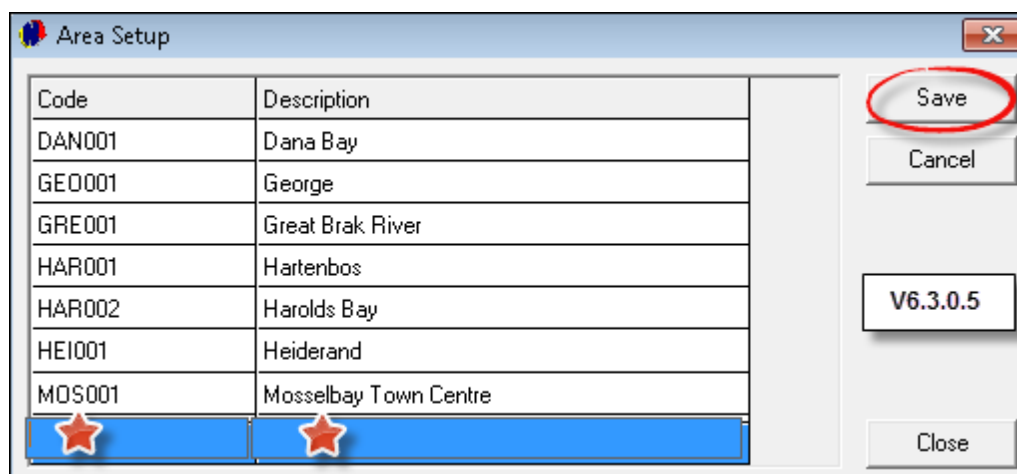
Agent Code	Agent Name	Active
AND001	Andy Green	✓
BEN001	Ben Barnes	✓
BEV001	Beverly Steward	✓
CHI001	Chris Mouton	✓
DAV001	David Ryan	✓
GEO001	George Hamilton	✓
LAW001	Lawrence Morgan	✓
PET001	Peter Taylor	✓
RIC001	Richard Dawson	✓
WIL001	Will Evans	✓

1 Add    2 Edit    3 Delete    4 Close

- **"Areas"** are used when **"Sites"** are created in the **"Customer"** master form. Also, when a **"Hygiene Schedule"** is being set, a route can be planned where all **"Sites"** in the same **"Area"** can be serviced while the **"Service Agent"** is there. For instance: in the greater Mossel Bay area, the following surrounding **"Areas"** can be created:
  - Mossel Bay Business District
  - Little Brak River
  - Heiderand
  - Dana Bay
  - Hartenbos
- In order to set up the above mentioned, click on **"Edit - Areas - Add"**



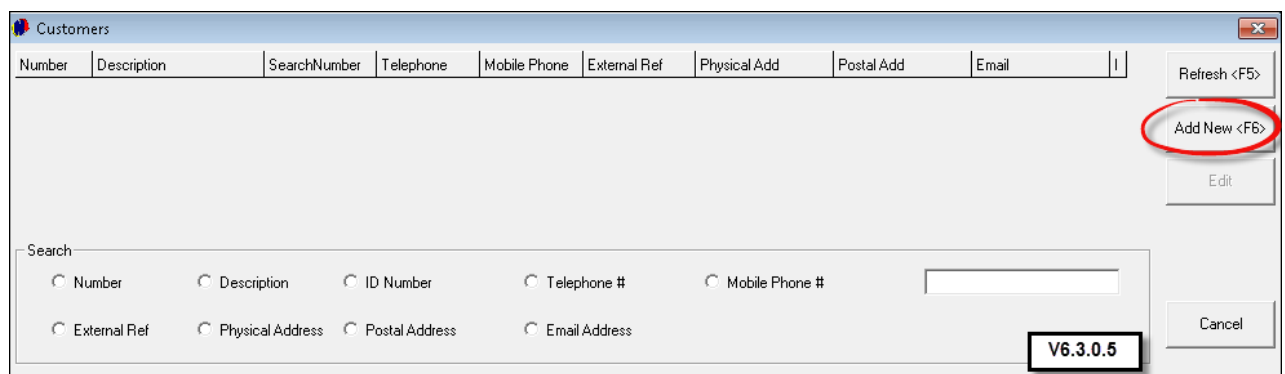
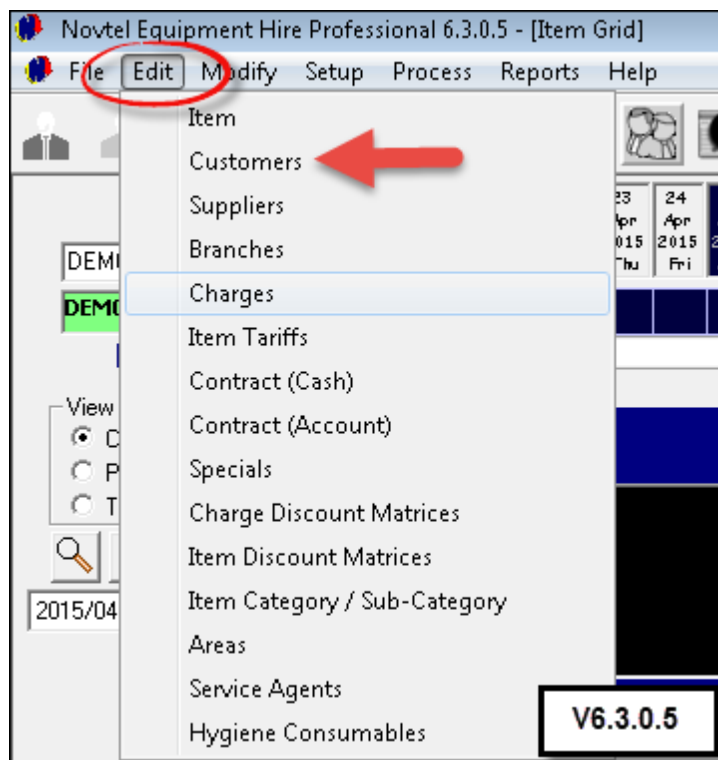
- Enter the **"Code"** and **"Description"** that you would like to allocate to the **"Area"**, and click **"Save"**



Repeat the process in order to create more **"Areas"**

## 10 Step 9 - Creating Customers

- In order to create "**Customers**", click on "**Edit - Customers - Add New**"



1. Do not enter an "**Account Code**". The system will automatically create the code according to the details you have entered in the tabs
2. For "**Corporate Customers**", tick the check-box at the top of the screen. Corporate Customers usually have terms of payment, and "**Account Contracts**" are created for them. For "**Private Customers**" renting toilets for a function, the check-box is left unchecked, and a "**Cash Contract**" is created
3. When the "**Company Name**" is entered, the "**Description**" is entered simultaneously
4. Select the "**Billing Interval**" from the list:
  - On Month End
  - On 25th Day
  - On 28th Day
  - No Month End

**Add New Customer** V6.3.0.5

Account Code  ✗ 1 2 ☒ Corporate Customer Billing Interval  4

External Account Ref  ☐ Monthly Container Hire

Description \*  ☐ Order Number Required

Customer Category  ☐ Use Item Tariff Prices

---

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

Postal Address \*

Physical Address \*

Tax Reference

Credit Limit

\* Required Fields

Company Name  3

Last Name \*

First Name \*

Title  Initials \*

Date of Birth   /

ID Number \*  RSA ID ☐

Company Reg No

Telephone No \*

Fax No

Mobile Phone \*

AH Telephone

Email Address

Search Number

Contact Person \*

Block Customer Account ☐

---

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

1. Enter the "**Customer's**" Postal Address
2. If the Physical Address differs from the Postal Address, enter the details. Alternatively, click on "**Copy Postal Address to Physical**" if it is the same, and it will be duplicated
3. Set the "**Credit Limit**" for this "**Customer**". The system will automatically block any further transactions when the limit is reached
4. Enter the "**Customer's**" first and last names (Normally the owner of the company)
5. Enter the Date of Birth, and the "**Customer's**" gender
6. Novtel Toilet Hire comes equipped with a full ID checker. When the ID number is inserted and "**RSA ID**" is ticked, the system will immediately indicate if the ID number is Valid or False. Please make sure that the details are correct
7. Enter the following details:
  - Company Registration Number
  - Telephone Number
  - Fax Number
  - Mobile Number
  - E-Mail Address
  - Contact Person
8. Click on "**Start Camera**" in order to activate the webcam to capture the image of the "**Customer**"

**Add New Customer** V6.3.0.5

Account Code

External Account Ref

Description \* Johnson Construction

Customer Category 02 - Corporate

☒ Corporate Customer  
☐ Monthly Container Hire

Billing Interval On Month End 0

☐ Order Number Required  
☐ Use Item Tariff Prices

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

Postal Address \* PO Box 123  
Mossel Bay  
6500

Physical Address \* Mossel Bay Industrial Park  
Da Nova  
Mossel Bay  
6500

Copy Postal Address to Physical

Tax Reference

Credit Limit 20000

Notes

\* Required Fields

Company Name Johnson Construction

Last Name \* Mike

First Name \* Johnson

Title Mr Initials \* J

Date of Birth 1956/05/06 M / F M

ID Number \* 5605060022022 RSA ID ☒

False

Company Reg No 12345

Telephone No \* 044 695 123 456

Fax No 044 695 123 456

Mobile Phone \* 081 695 123 456

AH Telephone

Email Address johnson@construction.co

Search Number

Contact Person \* Mike

Block Customer Account ☐

Start Camera

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

Provisional Customer Statement Pastel Customer Statement Accept Cancel



1. As soon as the **"Site Details"** tab are clicked, notice that the **"Account Code"** has been created
2. The **"Site"** listed, is the physical address of the Company (Customer). When contracts are created, **"Sites"** are added to this tab - which will be explained in Step 10

ACCOUNT CUSTOMER

Account Code: JO0001 1

External Account Ref:

Description: Johnson Construction

Customer Category: 00 - No category

☒ Corporate Customer  
☐ Monthly Container Hire

Billing Interval: On Month End

☐ Order Number Required  
☐ Use Item Tariff Prices

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

ID	Site	Contact	Mobile	Site #
JO0001/001	Mossel Bay Industrial Park <span style="color: red;">2</span>		081 695 123 456	001

Add Edit Delete

- The **"Contract Details"** tab will be void, since no contract has been created for this **"Customer"** yet
- In **"Setup - User Defined Fields"**, extra information pertaining to **"Customers"** can be created, and then inserted in this tab on the **"Customer's"** account
- The **"Private Customer"** tab will display the details of the contact person for this **"Company"**. All employees connected to this company can be added here as well
- Click **"Accept"** to save the **"Customer"** to the system
- In order to search for a **"Customer"**, click on any of the options in the **"Search fields"**

Customers

Number	Description	SearchNumber	Telephone	Mobile Phone	External Ref	Physical Add	Postal Add	Email	I

Refresh <F5>  
Add New <F6>  
Edit  
Cancel

Search

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

V6.3.0.5

1. Should you need to make changes to a **"Customer's"** account, click on it, and then on **"Edit"**. Make the changes and click **"Accept"**
2. In order to create more **"Customers"**, click **"Add New"**

Customers

Number	Description	ID Number	Telephone	Mobile Phone	External Ref	Physical Address	Postal Address	Email	I
CA0002	Cash Account	1234	0861 66 8835	0861 66 8835		PO Box 2223	PO Box 2223		F
JO0001	Johnson Construction	5605060022022	044 695 123 45	081 695 123 45		Mossel Bay Industrial Park	PO Box 123 <span style="color: red;">1</span>	johnson@construction <span style="color: red;">2</span>	F
NO0001	Novtel Maintenance	4567	0861 66 8835	0861 66 8835		PO Box 888	PO Box 888		F

Refresh <F5>  
Add New <F6>  
Edit  
Cancel

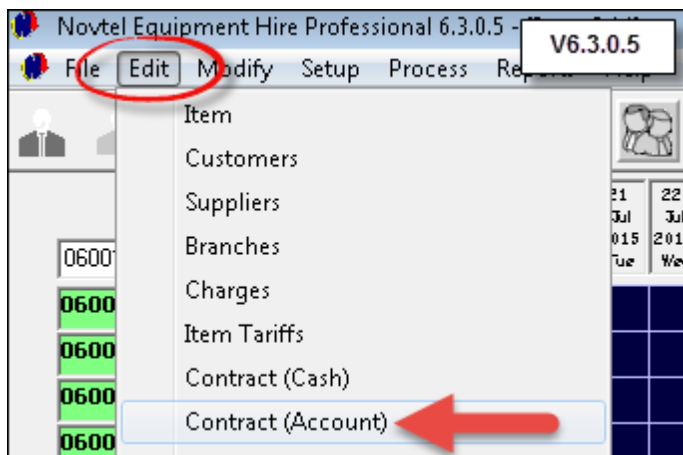
Search

☒ Number ☐ Description ☐ ID Number ☐ Telephone # ☐ Mobile Phone #  
☐ External Ref ☐ Physical Address ☐ Postal Address ☐ Email Address

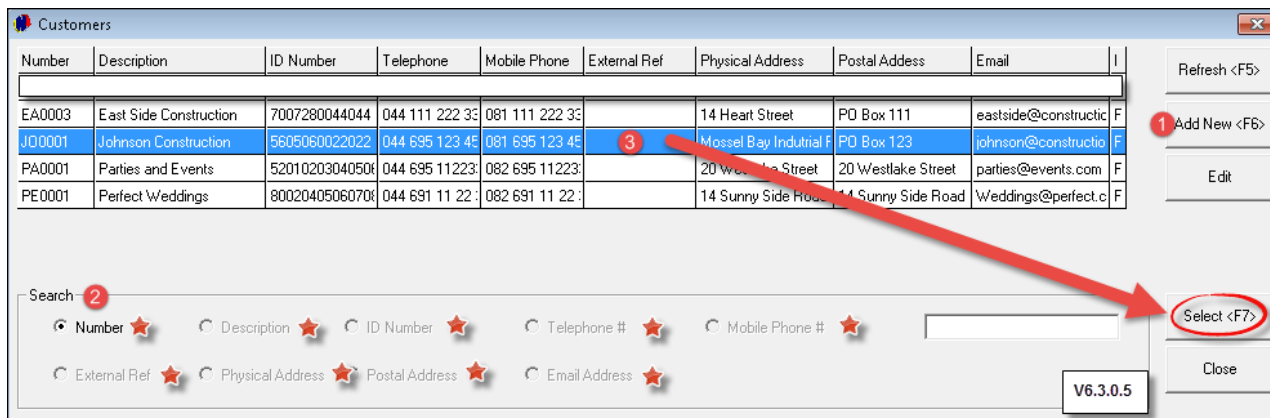
V6.3.0.5

## 11 Step 10 - Creating Contracts

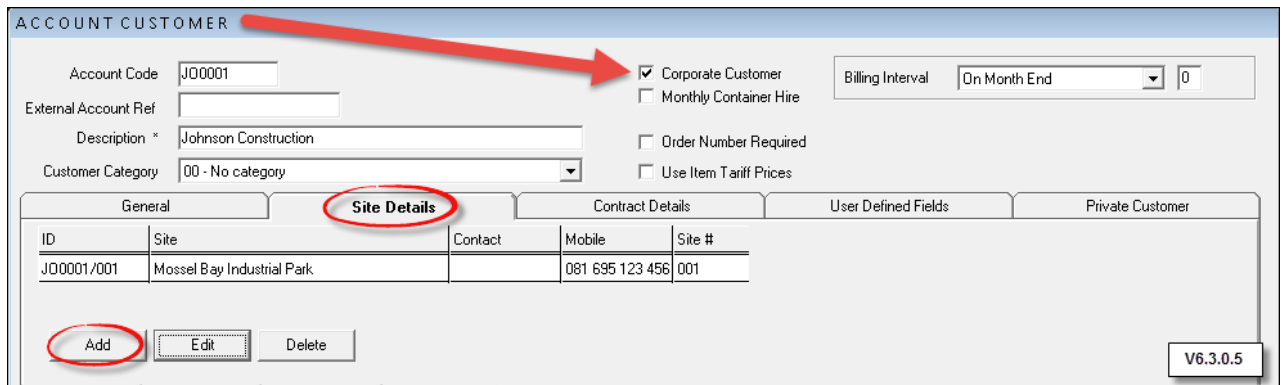
- There are 2 types of Contracts that can be created in Novtel:
  - Cash Contracts – For on the spot payment
  - Account Contracts - Account Customers will be allowed to have outstanding amounts when all "Items" are returned. In "Edit - Customers", tick the "Corporate Customer" check-box
- In order to create an "Account Contract", click on "Edit – Contract (Account)"



1. To create a contract for a new "Customer", click on "Add New" and follow the instructions in "Step 8 - Creating Customers". As soon as the "Customer" has been created, the "Contract Screen" will open for the contract to be created
2. In order to create a contract for an existing "Customer", click on any of the search options for the "Customers" window to open. Please note that ONLY "Customers" marked as "Corporate Customers" will display in this window
3. Click on the "Customer", and then on "Select"



- In the **"General"** tab, all information entered when the **"Customer"** was created, will display. Please note that this **"Customer"** is classified as an **"Account Customer"** because of the ticked **"Corporate Customer"** check-box
- In order to create the **"Site"** where the **"Item"** will be used, click on **"Add"**



ACCOUNT CUSTOMER

Account Code: JO0001

External Account Ref:

Description: Johnson Construction

Customer Category: 00 - No category

☒ Corporate Customer

☐ Monthly Container Hire

Billing Interval: On Month End 0

☐ Order Number Required

☐ Use Item Tariff Prices

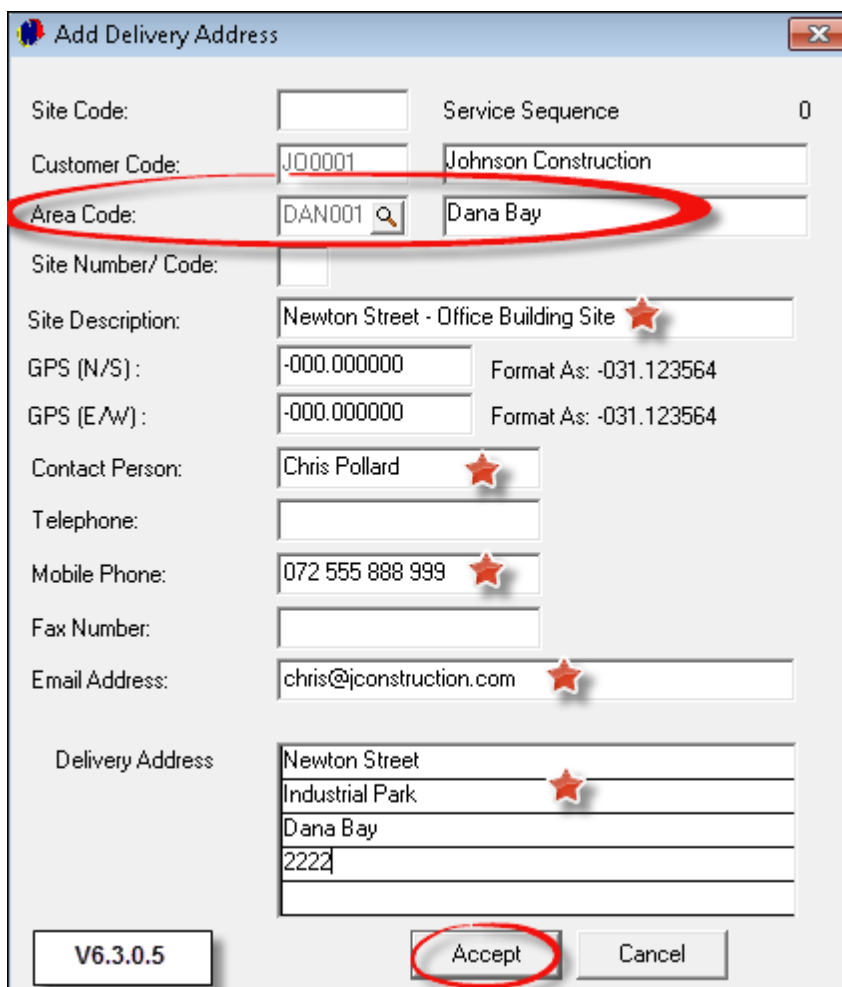
General Site Details Contract Details User Defined Fields Private Customer

ID	Site	Contact	Mobile	Site #
JO0001/001	Mossel Bay Industrial Park		081 695 123 456	001

Add Edit Delete

V6.3.0.5

- Click on the magnifying glass next to **"Area Code"** and select the **"Area"** from the list
- The **"Site Description"** has been entered as **"Newton Street - Office Building Site"**. The GPS coordinates can also be entered
- Enter the **"Contact Person"** at the **"Site"** and all their contact details
- Enter the physical address of the **"Site"**, and click **"Accept"** to save it



Add Delivery Address

Site Code: Service Sequence 0

Customer Code: JO0001 Johnson Construction

Area Code: DAN001 Dana Bay

Site Number/ Code:

Site Description: Newton Street - Office Building Site ★

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

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

Contact Person: Chris Pollard ★

Telephone:

Mobile Phone: 072 555 888 999 ★

Fax Number:

Email Address: chris@jconstruction.com ★

Delivery Address

Newton Street ★

Industrial Park ★

Dana Bay

2222

V6.3.0.5 Accept Cancel

- Multiple "Sites" can be created for each "Customer"
- Click on the applicable "Site" for which the contract is being created, and select "New Contract"

ACCOUNT CUSTOMER V6.3.0.5

Account Code: JO0001 ☐ Corporate Customer ☐ Monthly Container Hire ☐ Order Number Required ☐ Use Item Tariff Prices

External Account Ref:  Billing Interval: On Month End  0

Description \*: Johnson Construction

Customer Category: 00 - No category

General		Site Details	Contract Details		User Defined Fields	Private Customer
ID	Site	Contact	Mobile	Site #		
JO0001/004	14 Hessop Street - House Building Site	Ken West	073 555 888 777	004		
JO0001/003	17 Matter Street - House Building Site	Jeff Duncan	071 111 444 888	003		
JO0001/005	25 Time Street - House Building Site	Luther	082 369 258 147	005		
JO0001/006	47 Rutherford Street - House Building Site	Robert	081 147 258 369	006		
JO0001/001	Mossel Bay Industrial Park		081 695 123 456	001		
JO0001/002	Newton Street - Office Building Site	Chris Pollard	072 555 888 999	002		

Add Edit Delete

**New Contract**

Account Balance	On Rent Total	Total Due	Available Credit
-11200.00	694.00	-10516.00	30516.00

Provisional Customer Statement Pastel Customer Statement Accept Cancel

- Please note that the **"Contract Number, Invoice and Credit Number"** fields are blank for now
  - Select whether the **"Customer"** is collecting the **"Items"**, or if the **"Items"** are to be delivered to the **"Site"**
  - Select the start and end dates for the contract
    - For daily billed **"Items"**, the contract duration should only be valid for one day. (Please note that this is essential for **"Items"** scheduled for **"Hygiene Service Management"**). When the **"Daily Recurring Billing"** is done, the contract will automatically be extended for another day - until the **"Item"** is returned
  - The **"Contract Status"** is **"Provisional"** at present since no deposit has been raised as of yet
  - The **"Container Number"** is not applicable - this is used in the **"Container Hire"** part of the program
  - Enter the order number supplied by the **"Customer"** - should it be relevant
  - Set the discount percentage - if it is applicable
  - Should your company make use of **"Agents"**, click on the magnifying glass in order to browse for, and select the relevant **"Agent"**. (**"Agents"** are set up in Pastel, and updated to Novtel in the **"Modify Menu"**)

Contract Details V6.3.0.5

Contract Volume #: New Volume 20150803

Customer Code: JO0001 Johnson Construction

Site Number: JO0001/002 Newton Street - Office Building Site

Branch: Mossel Bay, Mossel Bay

Contract Number: ★

Corporate

Last Increment Date: 8/3/2015

Monthly Container Hire ☐

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

Invoice Number: ★

Credit Note Number: ★

Deliver/Collect (Default): 1 Deliver

Start Date: 2 8 / 3 / 2015 End Date: 8 / 3 / 2015

Order Number: 3 44

Contract Status: 4 Provisional

Container Number: 5 0

Discount %: 6 0 Fixed Day Limit Rate: Default

Agent Code: 7

Description:

Cancel Contract

**ACCOUNT CUSTOMER**

- In the **"Hire Item"** tab, click on **"Add New"** in order to open the window containing all the available **"Items"** in the system

Contract Details V6.3.0.5

Contract Volume #: 3 20150803

Customer Code: JO0001 Johnson Construction

Site Number: JO0001/002 Newton Street - Office Building Site

Branch: Mossel Bay, Mossel Bay

Contract Number: 3

Corporate

Last Increment Date: 8/3/2015

Monthly Container Hire ☐

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

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


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


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

- Search for the applicable "Item" by one of the following criteria:
  - Code
  - Plant Number (We have used this option)
  - Description
  - Maintenance Due
- Enter the criteria in the "Search For" field
- Click on the highlighted "Item", and then on "Accept" in order to select it. Repeat the process to add more "Items"

**Available Items**

Search

Search By  

Search For  

Code	Plant No	Description	Maintenance Due
06001001	1	Unit 1 - VIP Toilet Trailer , Blue Loo, 1	No
06002001	1	Unit 2 - VIP Toilet Trailer , Blue Loo, 1	No
06003001	1	Unit 3 - VIP Toilet Trailer, Blue Loo, 1	No
06004001	1	Unit 4 - VIP Toilet Trailer, Blue Loo, 1	No
06005001	1	Unit 5 - VIP Toilet Trailer, Blue Loo, 1	No
07002001	2	Unit 2 - Toilet / Shower Combo, Blue Loo, 2	No
07003001	2	Unit 3 - Toilet / Shower Combo, Blue Loo, 2	No
08001001	3	Unit 1 - 12 Toilets, Blue Loo, 3	No
08002001	3	Unit 2 - 12 Toilets, Blue Loo, 3	No
08003001	3	Unit 3 - 12 Toilets, Blue loo, 3	No
09001001	4	Unit 1 - Paraplegic Trailer, Blue Loo, 4	No
09002001	4	Unit 2 - Paraplegic Trailer, Blue loo, 4	No
09003001	4	Unit 3 - Paraplegic Trailer, Blue Loo, 4	No
11001001	5	Unit 1 - Single Toilet , Blue Loo, 5	No
11002001	5	Unit 2 - Single Toilet, Blue Loo, 5	No
11003001	5	Unit 3 - Single Toilet, Blue Loo, 5	No
11004001	5	Unit 4 - Single Toilet, Blue Loo, 5	No
11005001	5	Unit 5 - Single Toilet, Blue Loo, 5	No
11006001	5	Unit 6 - Single Toilet, Blue Loo, 5	No
11007001	5	Unit 7 - Single Toilet, Blue Loo, 5	No
10001001	6	Unit 1 - Shower, Blue Loo, 6	No
10002001	6	Unit 2 - Shower, Blue Loo, 6	No
10003001	6	Unit 3 - Shower, Blue Loo, 6	No

V6.3.0.5

**Accept** **Cancel**

- In order to change the "Item's" status - should the "Item" be delivered to the "Site" immediately - click the "On Rent" button and then "Apply Selection"

Contract Details V6.3.0.5

Contract Volume #: 3 20150803 Contract Number: 3

Customer Code: J00001 Johnson Construction Corporate

Site Number: J00001/002 Newton Street - Office Building Site Last Increment Date: 8/3/2015

Branch: Mossel Bay, Mossel Bay Monthly Container Hire ☒

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

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
5	08001001	Unit 1 - 12 Toilets, Blue Lo...		342.00	0.00	N	Provisio...	Deliver	1	1	0	0.00	0	0	0.00	0.00	0.00	0.00

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

On Rent <F8> Apply Selection <F2> Rain Day/Off Hire <F11> Amend Contract Cancel Item

- Now, for each "Item" to be rented, an information block will pop up:
  - Check that the "Date Out" is correct
  - Tick the check-boxes to "Charge on a Saturday and Sunday" - if applicable
  - The system will automatically enter the "Rate" as setup
  - Enter the "First Service Date"
  - Tick the check-boxes for the days on which the service schedules are to be created and click on "Day" if services are to occur on a daily basis
  - Enter all relevant notes in the field provided pertaining to this "Item"
  - Click "Accept"

On Rent Date

3 - Unit 1 - 12 Toilets, Blue Loo, 3

Date Out: 8/3/2015 13:36

Charge On Saturday ☒  
 Charge Saturday half day ☒  
 Charge On Sunday ☒

Hygiene Service Details

Synchronize Service Interval ☐ Charge First Service Fee ☐

Fixed Monthly Rent

Fee - Excl/TAX/Incl	0.00	0.00	0.00
Rent - Excl/TAX/Incl	300.00	42.00	342.00

First Service Date: 8/4/2015

New	Schedule	Existing
<input checked="" type="checkbox"/>	Sunday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Monday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Tuesday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Wednesday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Thursday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Friday	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Saturday	<input type="checkbox"/>
<input type="checkbox"/>	Day	<input type="checkbox"/>
<input type="checkbox"/>	Week	<input type="checkbox"/>
<input type="checkbox"/>	Fortnight	<input type="checkbox"/>
<input type="checkbox"/>	Monthly	<input type="checkbox"/>
<input type="checkbox"/>	None	<input type="checkbox"/>

Notes

Existing Hygiene Service Due  
 Newton Street - Office Building Site  
 No Existing Hygiene Items at Site

Accept Cancel

- The **"Non Rentals"** tab represents all **"Charges"** the **"Customer"** will be billed for - additional to the daily rent of the **"Item"**. These charges are added to the contract automatically when the **"Hygiene Consumables"** and **"Service Charge"** is added in **"Hygiene Service Management"**

Contract Details

Contract Volume # 3 20150803 Contract Number: 3

Customer Code : JO0001 Johnson Construction Corporate

Site Number : JO0001/002 Newton Street - Office Building Site Last Increment Date : 8/3/2015

Branch Mossel Bay, Mossel Bay Monthly Container Hire

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

Line Type	Charge	Description	Qty	Excl	Tax	Incl
			0.00	0.00	0.00	

Refresh Add Remark Add Delete

V6.3.0.5

- In order to raise and receive a deposit on the spot, click on the **"Deposits"** tab. (Remember that a shift MUST be open for this **"User"**. Please see **"Opening a Shift"** on the Forum: <http://www.novtel.com/forum/index.php?board=1245.0>). Notice how the Shift Number for James displays in this window
- For demonstration purposes, the **"Deposit Amount"** of R10 000.00 will be raised
- Click on the check-mark next to **"Deposit Raised"**

Contract Details

Contract Volume # 3 20150803 Contract Number: 3

Customer Code : JO0001 Johnson Construction Corporate

Site Number : JO0001/002 Newton Street - Office Building Site Last Increment Date : 8/3/2015

Branch Mossel Bay, Mossel Bay Monthly Container Hire

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

3 ✓ 1.) Deposit Raised Shift #: SFT00001 User : 1 James

Deposit Amount : 2 10000

2.) Deposit Paid <<< Suggested Deposit

3.) Deposit Applied

3.) Dep Fully Refunded

V6.3.0.5



- The **"Pay Deposit"** option now activates. If the **"Customer"** is ready to pay the deposit immediately, click on **"Pay Deposit"** (**"Deposits"** can also be received through **"Point of Sale"** at a later stage)

Contract Details

Contract Volume #: 3 20150803 Contract Number: 3

Customer Code: J00001 Johnson Construction Corporate

Site Number: J00001/002 Newton Street - Office Building Site Last Increment Date: 8/3/2015

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

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

1.) Deposit Raised 8/3/2015 Shift #: SFT00001 User: James

Deposit Amount: 10000.00 Deposit Due: 8/3/2015 Pay Deposit

2.) Deposit Paid <<< Suggested Deposit V6.3.0.5

- The amount set when the deposit was raised, is entered automatically
- Enter the **"Payment Received"** amount
- Select the **"Payment Type"** and enter the applicable details pertaining to the **"Payment Type"** selected. (Cash; Credit Card; Cheque or Bank Transfer)
- Click **"Accept"** to finalize the transaction, after which the receipt will print

Deposits

Contract Volume Number: 3

Customer Description: J00001 - Johnson Construction

Hire Number: 4

Customer Description: J00001 - Johnson Construction

Cashbook: 0

GL Account: 8100/000

Daily Taking Control

User: James

Shift #: SFT00001

Deposit History:

Date	Type	Amount

Amount Raised: 10000.00

Amount Paid: 0.00

Payment Type: Bank Transfer (3) Payment Acc

Payment Date: 8/3/2015

Bank Account Number: 12121212121

Bank Type: ABSA

Payment Received: (2) 10000

Change: 0.00

PAYMENT DUE (1) 10000.00

<F2> - Accept (4)

Print to: Screen Print

Close

- The "Deposit Paid" field has now turned "Aqua" – the color of the "Confirmed Status"

Contract Details

Contract Volume #: 3 20150803 Contract Number: 3

Customer Code: J00001 Johnson Construction Corporate

Site Number: J00001/002 Newton Street - Office Building Site Last Increment Date: 8/3/2015

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

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

1.J Deposit Raised 8/3/2015 Shift #: SFT00001 User: James

Deposit Amount: 10000.00 Deposit Due: 8/3/2015 Pay Deposit

2.J Deposit Paid 8/3/2015 2052000.00 <<< Suggested Deposit

Paid Amount: 10000.00 V6.3.0.5

- In the "Payment Tab", the following will display:
  - All "Items" entered in the "Hire Item" tab
  - The "Additional Costs" will be inserted in the "Non-Rentals" tab when services are updated in "Hygiene Service Management", and will be reflected here
  - The paid "Deposit" reflects as a "Payment Made"
  - The "Payment Due" amount is in a credit currently, since the "Deposit" has been paid

Contract Details

Contract Volume #: 3 20150803 Contract Number: 3

Customer Code: J00001 Johnson Construction Corporate

Site Number: J00001/002 Newton Street - Office Building Site Last Increment Date: 8/3/2015

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

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

Code	Description	Dur	Qty	Tax	Inclusive
08001001	Unit 1 - 12 Toilets, Blue Loo, 3	0	1	0.00	0.00
-	Additional Costs			4.91	40.00
-	Payments Made			0	-10000.00

DEPOSIT PAID 10000.00

INVOICE TOTAL 40.00

RECEIPT TOTAL 10000.00

DEPOSIT REFUND 0.00

DEPOSIT FORFEIT 0.00

PAYMENT DUE -9960.00

CREDIT NOTE 0.00

C N REFUND 0.00

Recalculate Totals

Refund Deposit

Refund Due

Contract Payment

V6.3.0.5

- In the “**Detail View**” tab, you will be able to view:
  - POS purchases made by this “**Customer**”
  - “**Customer**” Invoice / Credit Note History
  - Hygiene Service (Toilet Hire)
  - Rain Days
  - Plant

Contract Details

Contract Volume # 3 20150803 Contract Number: 3

Customer Code : JO0001 Johnson Construction Corporate

Site Number : JO0001/002 Newton Street - Office Building Site Last Increment Date : 8/3/2015

Branch Mossel Bay, Mossel Bay Monthly Container Hire

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

☐ POS Purchases
 ☐ Invoice/Credit Note History
 ☐ Non-Serial (LCHV)

☒ Hygiene Service
 ☐ Rain Days
 ☐ Plant

Item Code	Description	Serv QTY	Amount
08001001	Unit 1 - 12 Toilets, Blue Loo, 3	1	0.00

V6.3.0.5

- In the “**Financial**” tab, all financial transactions are recorded. Click “**Save**” in order to complete the “**Contract**” and click “**Close**” to exit

Contract Details

Contract Volume # 3 20150803 Contract Number: 3

Customer Code : JO0001 Johnson Construction Corporate

Site Number : JO0001/002 Newton Street - Office Building Site Last Increment Date : 8/3/2015

Branch Mossel Bay, Mossel Bay Monthly Container Hire

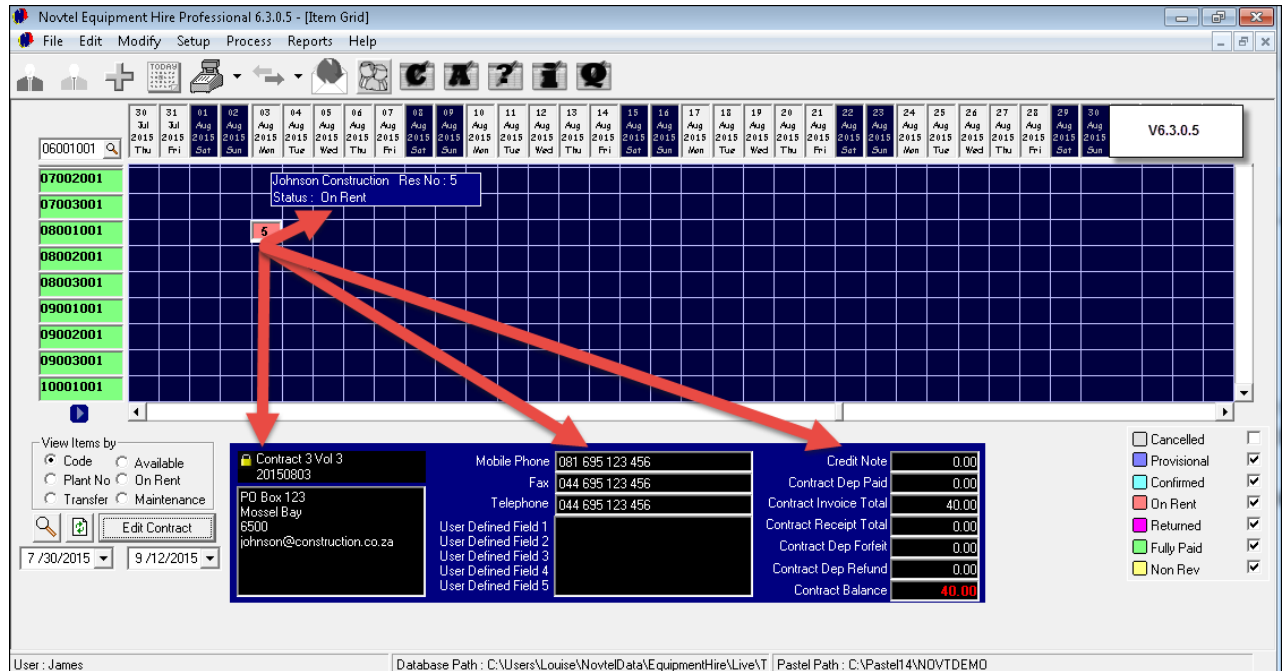
General Hire Item Non-Serial Non-Rentals Deposits Payment Detail View **Financial**

Document Num	Amount	Transaction	Time Stamp
REC00001	10000.00	Deposit	8/3/2015 04:15:43 PM

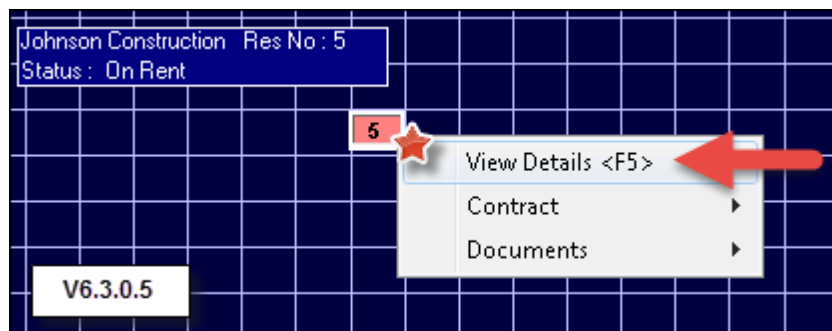
V6.3.0.5

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

- Returning to the Grid, the "Item" on contract for "Johnston Construction" will display in "Red" - the color of the "On Rent" Status. Moving the mouse over the "Items", an overview is displayed in the blue and black blocks, containing information such as the Customer's address; E-Mail; Contact Numbers and Financial Details pertaining to the contract



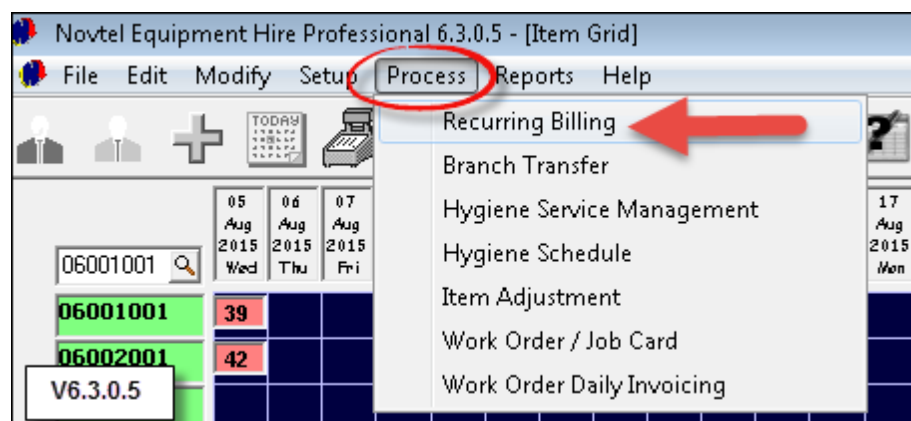
- In order to make changes to a contract, right click on the contract on the Grid and select "View Details"



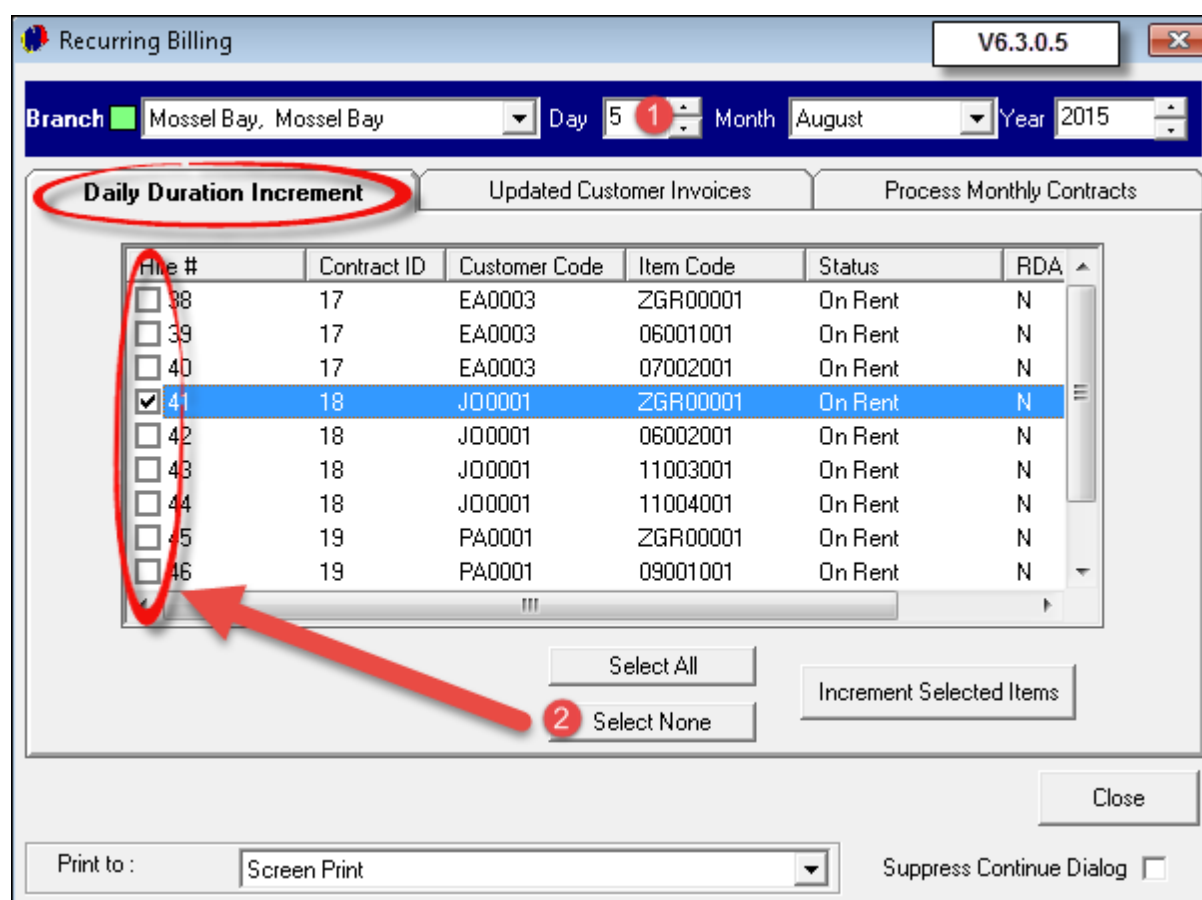
- When the contract opens, click on "Edit"; make the changes and click "Save"

## 12 Step 11 - Recurring Billing - Daily Duration Increment

- Open Pastel and check for "Open Batches". These must be updated before the "Recurring Billing" process can commence
- This process is done daily to increment all "On Rent" contracts. It will automatically add another day to the contract until all outstanding "Items" have been returned and invoiced. Please note that the "Recurring Billing" must be done in order for the "Hygiene Service Management" window to display all "Items" on which services are due
- Click on "Process - Recurring Billing"



1. In the "Daily Duration Increment" tab, select the date to be billed
2. Should the "User" only need to charge a certain contract for the specific day, click "Select None" and then tick the check-box next to the specific contract to be charged



- When the **"Select All"** button is clicked, all of the **"Items"** will be ticked and charged. Then click on **"Increment Selected Items"**

Recurring Billing V6.3.0.5

Branch  Day  Month  Year

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

Hire #	Contract ID	Customer Code	Item Code	Status	RDA
<input checked="" type="checkbox"/> 37	17	EA0003	ZGR00001	On Rent	N
<input checked="" type="checkbox"/> 38	17	EA0003	06001001	On Rent	N
<input checked="" type="checkbox"/> 40	17	EA0003	07002001	On Rent	N
<input checked="" type="checkbox"/> 41	18	JO0001	ZGR00001	On Rent	N
<input checked="" type="checkbox"/> 42	18	JO0001	06002001	On Rent	N
<input checked="" type="checkbox"/> 43	18	JO0001	11003001	On Rent	N
<input checked="" type="checkbox"/> 44	18	JO0001	11004001	On Rent	N
<input checked="" type="checkbox"/> 45	19	PA0001	ZGR00001	On Rent	N
<input checked="" type="checkbox"/> 46	19	PA0001	09001001	On Rent	N

Print to :   Suppress Continue Dialog ☐

- Tick the check-box to **"Print Detailed Pre-Import List"** and click **"Proceed"**

Month End Options

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

V6.3.0.5

- The processing will be queued, and as soon as the process is done, the **"Pre-Incremented List"** will be displayed. After checking the list - when you are satisfied that everything is correct - either print, save or close the list

**Pre-Increment List From 2015/08/05 To 2015/08/06**

PRINTED DATE: 05 AUGUST 2015 TIME: 04:24:07 PM

**CUSTOMER - RENT PER ITEM**

HIRE #	CONTRACT	CUSTOMER	ITEM CODE	DESCRIPTION	QTY	CURRENT TOTAL	INCREMENT	RAIN DAY	NEW TOTAL
39	17	EA0003 - East Side Construction	06001001	Unit 1 - VIP Toilet Trailer, Blue Loo, 1	1	0.00	114.00	0.00	114.00
40	17	EA0003 - East Side Construction	07002001	Unit 2 - Toilet / Shower Combo, Blue Loo, 2	1	0.00	228.00	0.00	228.00
42	18	JO0001 - Johnson Construction	06002001	Unit 2 - VIP Toilet Trailer, Blue Loo, 1	1	0.00	114.00	0.00	114.00
43	18	JO0001 - Johnson Construction	11003001	Unit 3 - Single Toilet, Blue Loo, 5	1	0.00	57.00	0.00	57.00
44	18	JO0001 - Johnson Construction	11004001	Unit 4 - Single Toilet, Blue Loo, 5	1	0.00	57.00	0.00	57.00
46	19	PA0001 - Parties and Events	09001001	Unit 1 - Paraplegic Trailer, Blue Loo, 4	1	0.00	171.00	0.00	171.00
47	19	PA0001 - Parties and Events	09002001	Unit 2 - Paraplegic Trailer, Blue Loo, 4	1	0.00	171.00	0.00	171.00
48	19	PA0001 - Parties and Events	07003001	Unit 3 - Toilet / Shower Combo, Blue Loo, 2	1	0.00	114.00	0.00	114.00
NUMBER OF ITEMS TO BE UPDATED - 8					TOTALS	8	0.00	1026.00	0.00
									1026.00

- Click **"Yes"** in order to continue with the update. The window for this specific date is now cleared since the billing has been done. Click **"Close"** to exit the window

**Recurring Billing**

Branch  Day  Month  Year

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

Hire #	Contract ID	Customer Code	Item Code	Status	RDA

Select All Select None Increment Selected Items

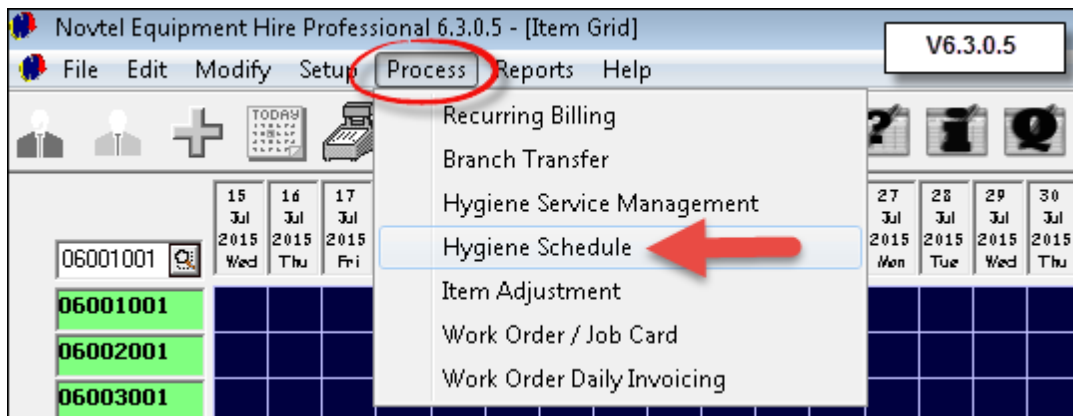
V6.3.0.5

Print to :  Suppress Continue Dialog ☐

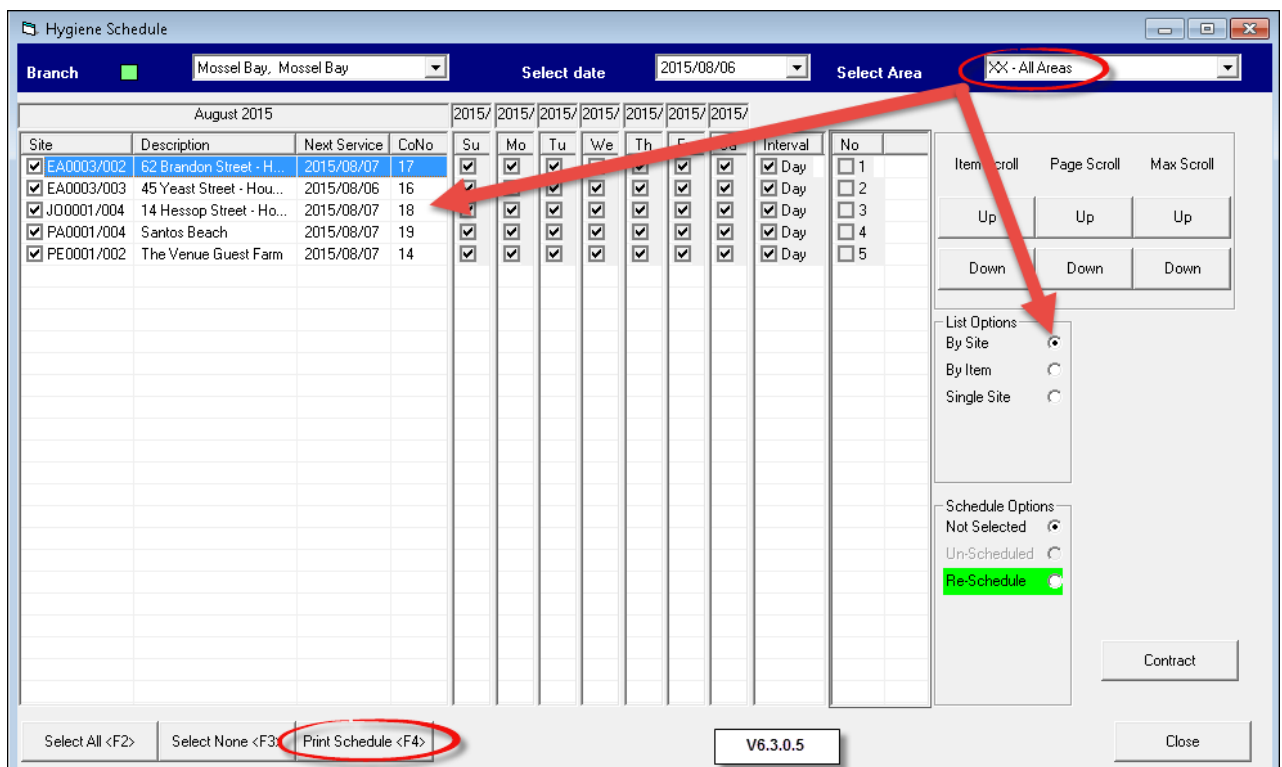
**Close**

## 13 Step 12 - Hygiene Scheduling

- When the contract was created, the days for the "Items" on rent to be serviced, was selected. In order to print a schedule for the week from Sunday to Saturday, click on "**Process - Hygiene Schedule**"

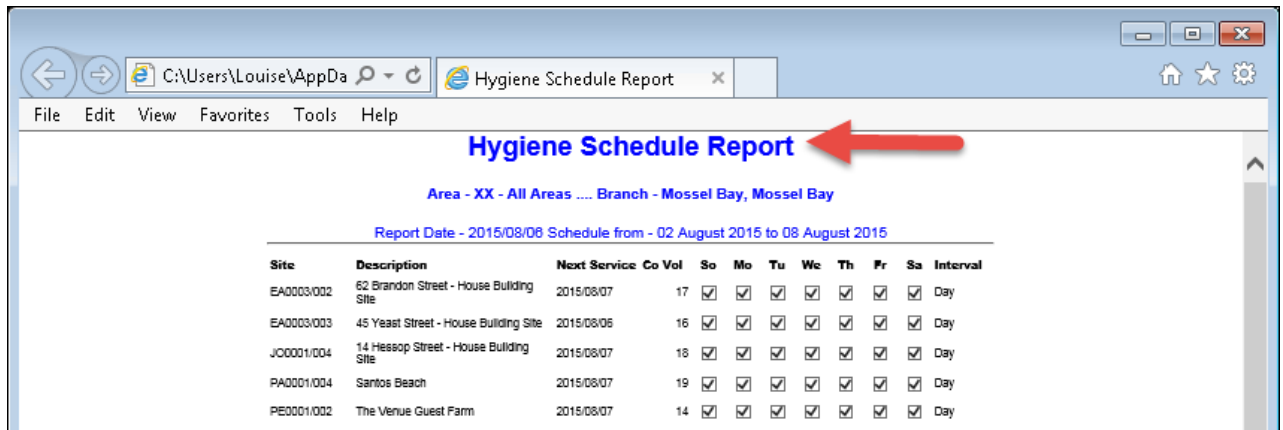


- There are various options to choose from in order to manage "Hygiene Scheduling" more effectively. When "All Areas" are selected in the top right hand side of the window, the "Areas" where "Items" are on rent, will all display in the same screen. Notice that the "List Option": "By Site" is also selected in the image below





- When the **"Print Schedule"** button is selected, the following report is displayed in HTML format - and it can be printed or saved from the **"File Menu"**



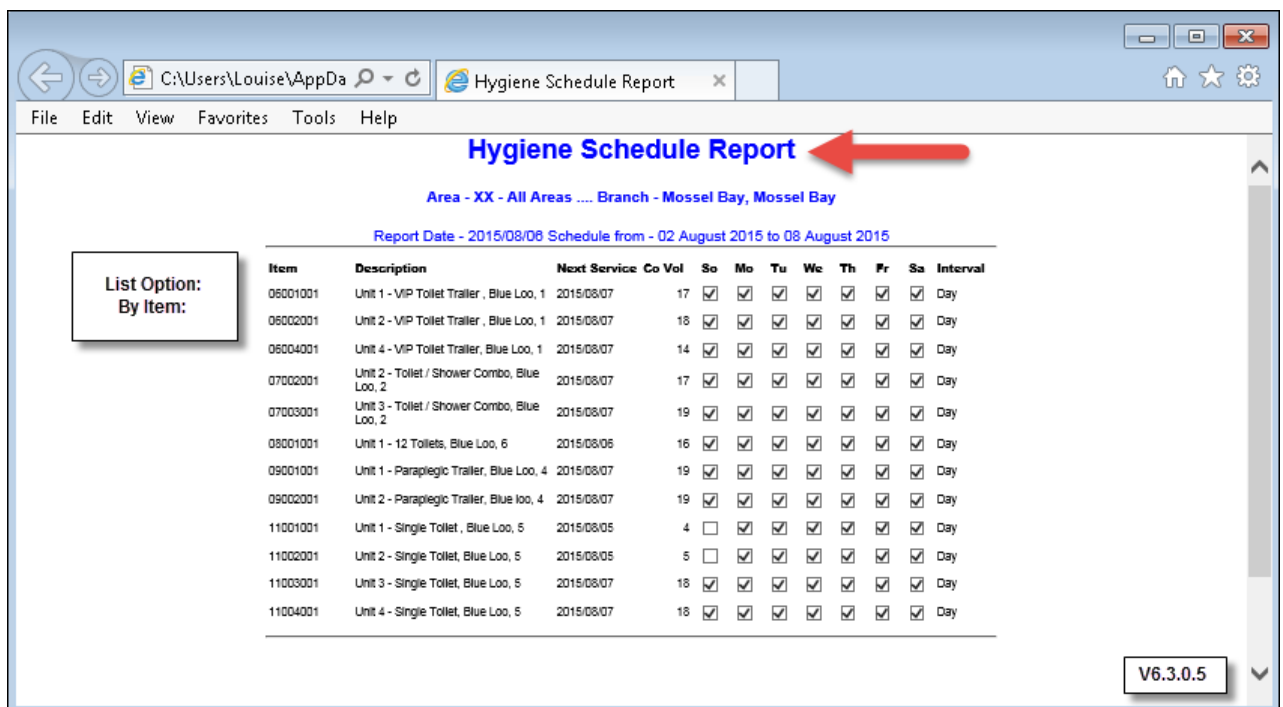
**Hygiene Schedule Report**

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

Report Date - 2015/08/06 Schedule from - 02 August 2015 to 08 August 2015

Site	Description	Next Service	Co Vol	So	Mo	Tu	We	Th	Fr	Sa	Interval
EA0003/002	62 Brandon Street - House Building Site	2015/08/07	17	<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
EA0003/003	45 Yeast Street - House Building Site	2015/08/06	16	<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
JO0001/004	14 Hesselop Street - House Building Site	2015/08/07	18	<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
PA0001/004	Santos Beach	2015/08/07	19	<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
PE0001/002	The Venue Guest Farm	2015/08/07	14	<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

- In the same way, the **"List Option"**: **"By Item"** and **"By Single Site"** can be selected



**Hygiene Schedule Report**

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

Report Date - 2015/08/06 Schedule from - 02 August 2015 to 08 August 2015

List Option:  
By Item:

Item	Description	Next Service	Co Vol	So	Mo	Tu	We	Th	Fr	Sa	Interval
06001001	Unit 1 - VIP Toilet Trailer, Blue Loo, 1	2015/08/07	17	<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
06002001	Unit 2 - VIP Toilet Trailer, Blue Loo, 1	2015/08/07	18	<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
06004001	Unit 4 - VIP Toilet Trailer, Blue Loo, 1	2015/08/07	14	<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
07002001	Unit 2 - Toilet / Shower Combo, Blue Loo, 2	2015/08/07	17	<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
07003001	Unit 3 - Toilet / Shower Combo, Blue Loo, 2	2015/08/07	19	<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
08001001	Unit 1 - 12 Toilets, Blue Loo, 6	2015/08/06	16	<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
09001001	Unit 1 - Paraplegic Trailer, Blue Loo, 4	2015/08/07	19	<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
09002001	Unit 2 - Paraplegic Trailer, Blue Loo, 4	2015/08/07	19	<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
11001001	Unit 1 - Single Toilet, Blue Loo, 5	2015/08/05	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
11002001	Unit 2 - Single Toilet, Blue Loo, 5	2015/08/05	5	<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
11003001	Unit 3 - Single Toilet, Blue Loo, 5	2015/08/07	18	<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
11004001	Unit 4 - Single Toilet, Blue Loo, 5	2015/08/07	18	<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

V6.3.0.5

1. "Hygiene Schedules" can also be printed by "Area" and "By Item"
2. All the "Sites" within the specific "Area" will be listed, and the previously set up "schedule" for each "Site" can be changed by clicking on the "Re-Schedule" button - highlighted in green. See how every day has been selected at present

Hygiene Schedule

Branch: Mossel Bay, Mossel Bay Select date: 2015/08/05 Select Area: GRE001 - Great Brak River

August 2015

Item	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No
06004001	Unit 4 - VIP Toilet Trail...	2015/08/07		<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

Item Scroll Page Scroll Max Scroll

List Options:  
 By Site ☐  
 By Item ☒  
 Single Site ☐

Schedule Options:  
 Not Selected ☒  
 Un-Scheduled ☐  
 Re-Schedule ☒

V6.3.0.5

- De-select the days on which the services must be cancelled. The date for the "Next Service Day" will be displayed
- Click on "Apply New" to set the new schedule for this "Site"

Hygiene Schedule

Branch: Mossel Bay, Mossel Bay Select date: 2015/08/05 Select Area: GRE001 - Great Brak River

August 2015

Item	Description	Next Service	CoNo	Su	Mo	Tu	We	Th	Fr	Sa	Interval	No
06004001	Unit 4 - VIP Toilet Trail...	2015/08/07	14	<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

Item Scroll Page Scroll Max Scroll

Up Up Up  
Down Down Down

List Options:  
 By Site ☐  
 By Item ☒  
 Single Site ☐

Schedule Options:  
 Not Selected ☒  
 Un-Scheduled ☐  
 Re-Schedule ☒

Next Service Date: 2015/08/07

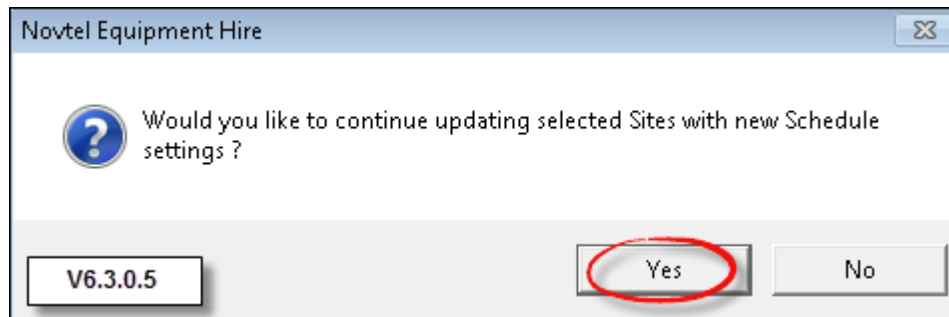
Contract

V6.3.0.5

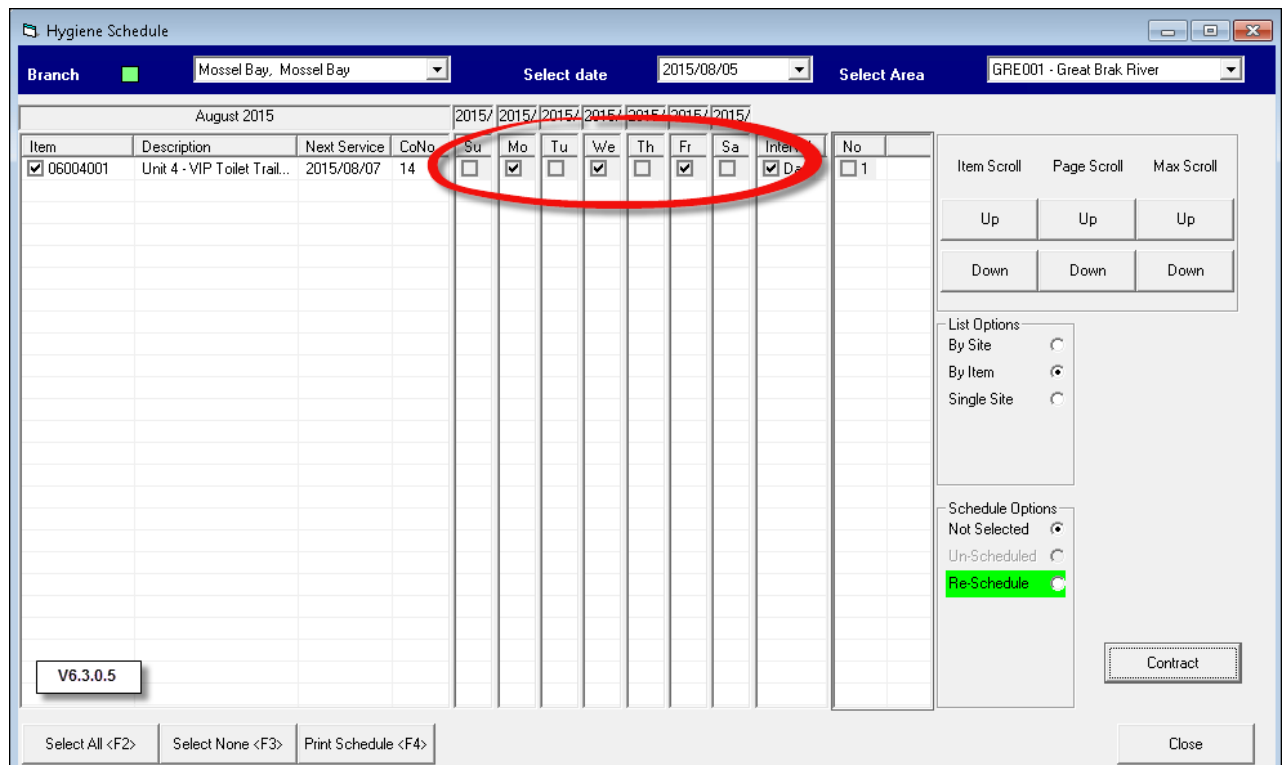
Select All <F2> Select None <F3> Print Schedule <F4>

Display New <F6> Apply New <F3> Close

- Click "Yes" to update the new settings

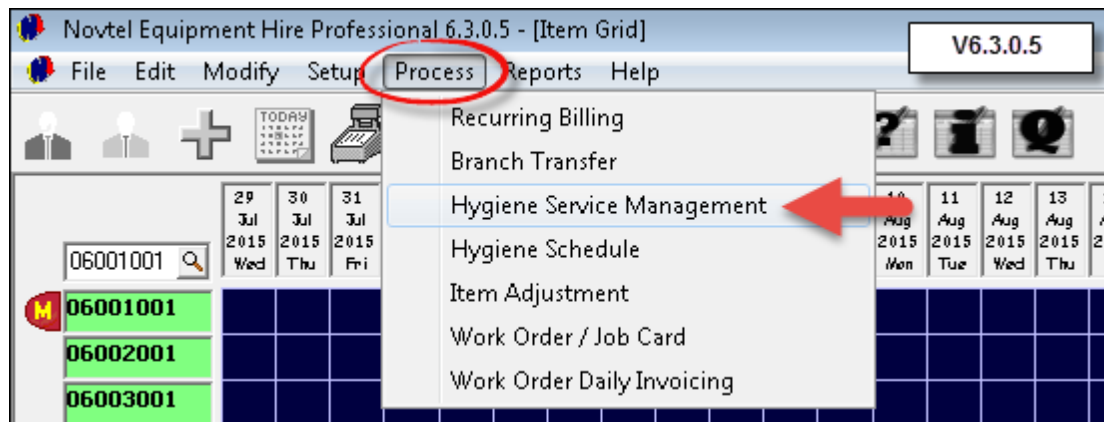


- The new settings have been applied. Please note that services for multiple "Items" or "Sites" can be edited in the same manner

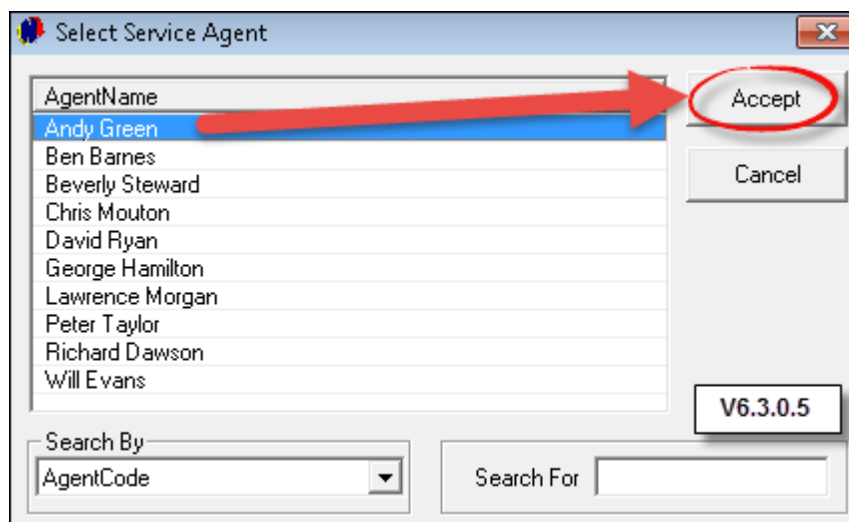
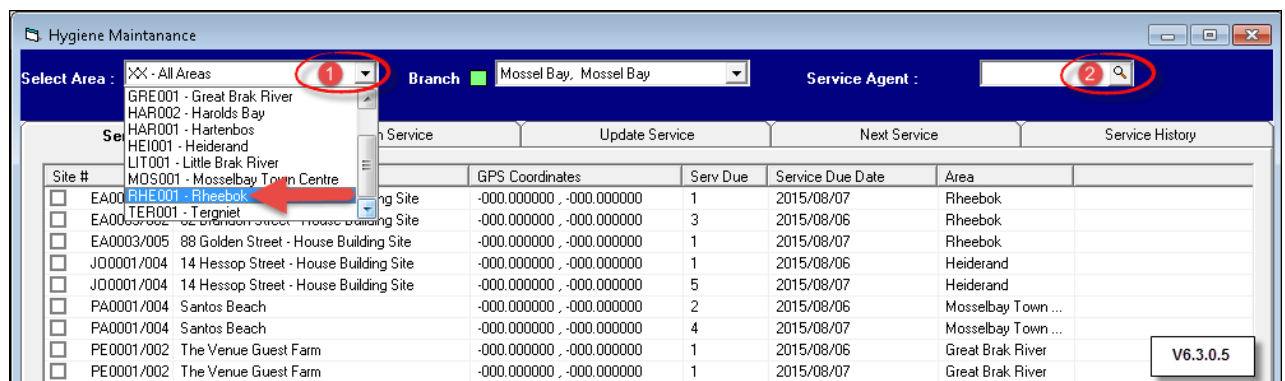


## 14 Step 13 - Hygiene Service Management

- In order to administrate the "**Services**" for each of the "**Areas**" and "**Sites**", click on "**Process - Hygiene Service Management**"



- "**Service Agents**" can be linked to specific "**Areas**" and "**Sites**". Select the "**Area**" from the drop-down list
- Click on the magnifying glass next to "**Service Agent**", and select the applicable person who will be performing the services in the "**Area**"



- In order to add notes pertaining to a specific "**Item**", click on the "**View by Item Code**" display option; click on the "**Item**" and then on "**Add Instruction**". Enter the note and click "**Accept**"

- Select the **"View by Site Display Option"**, and then click on **"Select All"** in order to select all of the **"Sites"** listed in the **"Service Due"** tab
- In order to set a specific route for the driver to follow - especially when there are numerous **"Sites"** in one **"Area"** - click on **"Site Sequence"**

Hygiene Maintenance

Select Area : RHE001 - Rheeboek Branch Mossel Bay, Mossel Bay Service Agent : Andy Green

Site #	Description	GPS Coordinates	Serv Due	Service Due Date	Area
EA0003/002	62 Brandon Street - House Building Site	-000.000000 , -000.000000	1	2015/08/07	Rheeboek
EA0003/002	62 Brandon Street - House Building Site	-000.000000 , -000.000000	3	2015/08/06	Rheeboek
EA0003/005	88 Golden Street - House Building Site	-000.000000 , -000.000000	1	2015/08/07	Rheeboek

1. >> Add Instructions 2. >> Site Sequence 3. >> Print Service

Display Option: View by Site (selected), View by Item Code, Reprint Transaction

Search Filter: Show All, Specific Day

Print to : Screen Print Close

- Click on the magnifying glass next to **"Area Code"**

Hygiene Maintenance

Area Code : [magnifying glass icon]

V6.3.0.5

- Select the specific **"Area"** from the list, and click **"Accept"**

Available areas

Search By Code Search For

Code	Description
DAN001	Dana Bay
GEO001	George
GRE001	Great Brak River
HAR001	Hartenbos
HAR002	Harolds Bay
HEI001	Heiderand
LIT001	Little Brak River
MOS001	Mosselbay Town Centre
RHE001	Rheeboek

V6.3.0.5 Accept Cancel

- All **"Sites"** in the **"Area"** will be displayed. In order to move a **"Site"** from one position to another, click on it; hold the mouse button down and drag the **"Site"** into position. Repeat the process until all **"Sites"** are in chronological order for the **"Service Agent"** to follow

Hygiene Maintenance

Area Code : RHE001 Rheebok

Seque...	ID	Site	Suburb
0	JO000...	47 Rutherford Street - ...	Rheebok
0	EA000...	62 Brandon Street - Ho...	Rheebok
0	JO000...	25 Time Street - House ...	Rheebok
0	EA000...	88 Golden Street - Hou...	Rheebok

Accept Cancel

- Click on **"Specific Day"** in the **"Search Filter"** field; enter the date and click on **"Print Service"**

1. >> Add Instructions Select All Deselect all

2. >> Site Sequence

3. >> Print Service

Display Option

View by Site ☒

View by Item Code ☐

Reprint Transaction ☐

Search Filter

Show All ☐

Specific Day ☒

Due Date search : 2015/08/06

Print to : Screen Print

Close

V6.3.0.5

- The "Service Instruction" slip will print for each of the the "Sites". The "Service Agent" must get the slips signed and filled out at each "Site"

**Novtel Toilet Hire**

30 Diaz Office Park  
Beach Boulevard  
Diaz Beach  
Mossel Bay  
Tel: 0861 66 8835  
Fax: 0861 66 8835  
VAT : 1234

Hygiene Service Instruction

---

**06002001** Unit2 - VIP ToiletTrailer, Maint  
Blue Loo, 1

Spray \_\_\_\_\_ Towel50 \_\_\_\_\_ Towel500 \_\_\_\_\_  
Soap \_\_\_\_\_ Soap Anti Bac \_\_\_\_\_ Paper1 \_\_\_\_\_  
Paper2 \_\_\_\_\_

**11003001** Unit3 - Single Toilet, Blue Maint  
Loo, 5

Spray \_\_\_\_\_ Towel50 \_\_\_\_\_ Towel500 \_\_\_\_\_  
Soap \_\_\_\_\_ Soap Anti Bac \_\_\_\_\_ Paper1 \_\_\_\_\_  
Paper2 \_\_\_\_\_

ContractVolume 18/18  
Customer: J00001 - Johnson  
Construction  
Site Address: 14 Hessop Street  
Helderland  
Staffmember: James  
Print Date: 2015/08/11  
Time: 08:22:28 AM  
Service Agent: Willie Buis  
Service Instruction: S000014

---

Thank You.

- Print or save the "Hygiene Service Schedule Batch"
- This process moves the "Sites" to the "On Service" tab

Site	Site Address	Customer Name	Site Phone No	To Service	SEQ	GPS Coordinates	Batch
EAD003/002	62 Brandon Street , Rheeboek	East Side Construction	083 123 456 789	2	2	-000.000000 , -000.000000	1

Repeat the steps for all of the "Areas". The "Service Due" tab will now be cleared

1. As the "Service Agents" return with the filled out "Hygiene Slips", click on the "On Service" tab and select the "Service Agent"
2. Click on the "View by Item Code Display Option" in order to activate the "Add Consumables" and "Hide Captured" buttons
3. Tick the check-box to "Hide Captured" items. The "Captured Items" will no longer appear in the "On Service" window, since it has been completed
4. Select the "Item" to which "Hygiene Consumables" must be added and click on "Add Consumables"

Hygiene Maintenance

Select Area :  Branch :  Service Agent :

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

ItemCode	Description	Doc #	Service Date	Area	Hire #	Due Date	Driver	Site	Captured	SiteNo
06001001	Unit 1 - VIP Toilet Trailer , Blue Loo, 1	SI000001	2015/08/06	Rheebok	39	2015/08/06	Andy Gre...	62 Brandon Stre...		EA0003/002
06002001	Unit 2 - Toilet / Shower Combo, Blue...	SI000001	2015/08/06	Rheebok	40	2015/08/06	Andy Gre...	62 Brandon Stre...		EA0003/002
06003001	Unit 2 - VIP Toilet Trailer , Blue Loo, 1	SI000003	2015/08/06	Heiderand	42	2015/08/06	Andy Gre...	14 Hessop Stree...		JO0001/004
11003001	Unit 3 - Single Toilet, Blue Loo, 5	SI000003	2015/08/06	Heiderand	43	2015/08/06	Andy Gre...	14 Hessop Stree...		JO0001/004
11004001	Unit 4 - Single Toilet, Blue Loo, 5	SI000003	2015/08/06	Heiderand	44	2015/08/06	Andy Gre...	14 Hessop Stree...		JO0001/004
07003001	Unit 3 - Toilet / Shower Combo, Blue...	SI000004	2015/08/06	Mosselba...	48	2015/08/06	Andy Gre...	Santos Beach		PA0001/004

Select All **Add Consumables** Deselect all

Display Option  
View by Site  
View by Item Code ☒ 2

Search Filter  
Show Details  
Show Consumables  
Specific Service Agent  
**Hide Captured** ☒ 3

Cancel Service

V6.3.0.5

1. The "Site" is entered at the top of the screen
2. The "Item" and the "Service Charge" is inserted automatically
3. All the "Hygiene Consumables" created, will be displayed in this window. Enter the quantity next to the specific "Consumable" replaced in this "Item". Even if no "Consumables" were replaced, this step must still be completed. Simply leave the quantities at zero
4. Click "Accept" to save the "Consumables" to the "Item". This information will be saved to the "Customer Contract Non Rentals" tab

Hygiene Transactions

EA0003/002 - 62 Brandon Street - House Building Site 1

Unit 1 - VIP Toilet Trailer , Blue Loo, 1 2

**NEXT SITE START**

Service Date :  Service Charge Incl :  3

Charge Code	Qty	Description
AIR001	1	Spray - Airfreshner Spray 375ml
PAP001	0	Towel - Paper Towel Barrel 50m
PAP002	1	Towel - Paper Towel Folded 500
SOA001	1	Soap - Liquid Hand Soap 700ml refill
SOA002	0	Soap - Liquid Hand Soap 700ml Anti Bacterial
TOI001	3	Paper - Toilet Paper 1 Ply per roll
TOI002	0	Paper - Toilet Paper 2 Ply per roll

**Accept** 4 Cancel



- Repeat the steps until all "Items" have been captured, and the "On Service" tab has been cleared for this "Service Agent". Select the next "Area" and "Service Agent", and repeat the process

Hygiene Maintenance

Select Area :  Branch  Service Agent :

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

ItemCode	Description	Doc #	Service Date	Area	Hire #	Due Date	Driver	Site	Captured	SiteNo

Select All Add Consumables Deselect all Cancel Service

Display Option  
View by Site ☐  
View by Item Code ☒

Search Filter  
Show Details ☒  
Show Consumables ☐  
Specific Service Agent ☐  
Hide Captured ☒

V6.3.0.5

- Now click on the "Update Service" tab and then on the "View by Item Code Display Option" in order to activate the "Complete Service" tab
- Tick the check-box next the "Item" to be updated, and click on "Complete Service". Alternatively, click on "Select All" for all of the "Items" to be updated simultaneously when the "Complete Service" button is clicked

Hygiene Maintenance

Select Area :  Branch  Service Agent :

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

ItemCode	Description	Doc #	Service Date	Type	Area	Hire #	Due Date	Driver	Site	SiteNo
<input checked="" type="checkbox"/> 06001001	Unit 1 - VIP Toilet Trailer, Blue Loo, 1	SI000001	2015/08/06	Maint	Rheebok	39	2015/08/06	Andy Green	62	14
<input type="checkbox"/> 06002001	Unit 2 - VIP Toilet Trailer, Blue Loo, 1	SI000003	2015/08/07	Maint	Heiderand	42	2015/08/06	Andy Green	14	14
<input type="checkbox"/> 06004001	Unit 4 - VIP Toilet Trailer, Blue Loo, 1	SI000002	2015/08/07	Maint	Great Brak River	33	2015/08/06	Andy Green	TH	14
<input type="checkbox"/> 07002001	Unit 2 - Toilet / Shower Combo, Blue Loo, 2	SI000001	2015/08/07	Maint	Rheebok	40	2015/08/06	Andy Green	62	14
<input type="checkbox"/> 07003001	Unit 3 - Toilet / Shower Combo, Blue Loo, 2	SI000004	2015/08/07	Maint	Mosselbay Town ...	48	2015/08/06	Andy Green	52	14
<input type="checkbox"/> 09001001	Unit 1 - Paraplegic Trailer, Blue Loo, 4	SI000004	2015/08/07	Maint	Mosselbay Town ...	46	2015/08/06	Andy Green	52	14
<input type="checkbox"/> 09002001	Unit 2 - Paraplegic Trailer, Blue Loo, 4	SI000004	2015/08/07	Maint	Mosselbay Town ...	47	2015/08/06	Andy Green	52	14
<input type="checkbox"/> 11003001	Unit 3 - Single Toilet, Blue Loo, 5	SI000003	2015/08/07	Maint	Heiderand	43	2015/08/06	Andy Green	14	14
<input type="checkbox"/> 11004001	Unit 4 - Single Toilet, Blue Loo, 5	SI000003	2015/08/07	Maint	Heiderand	44	2015/08/06	Andy Green	14	14

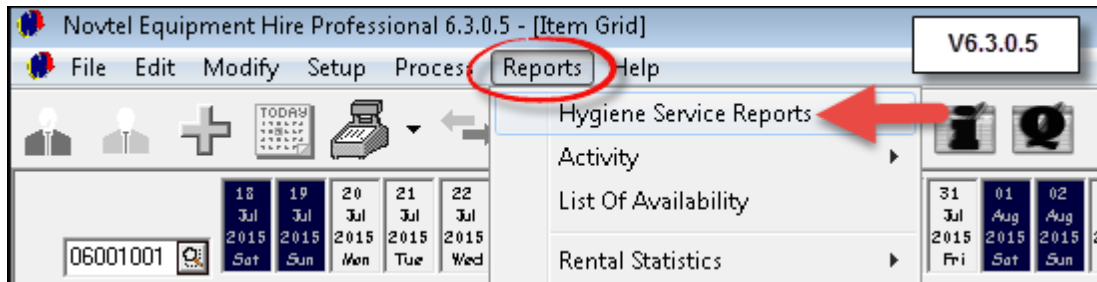
Select All **Complete Service** Deselect all

Display Option  
View by Site ☐  
View by Item Code ☒

V6.3.0.5

- The "Update Service" tab will now be cleared, and all "Items" to be serviced on the next day, will be displayed in the "Next Service" tab
- Please note that all "Overdue Services" will be displayed in red

- Click on "Reports - Hygiene Service Reports"



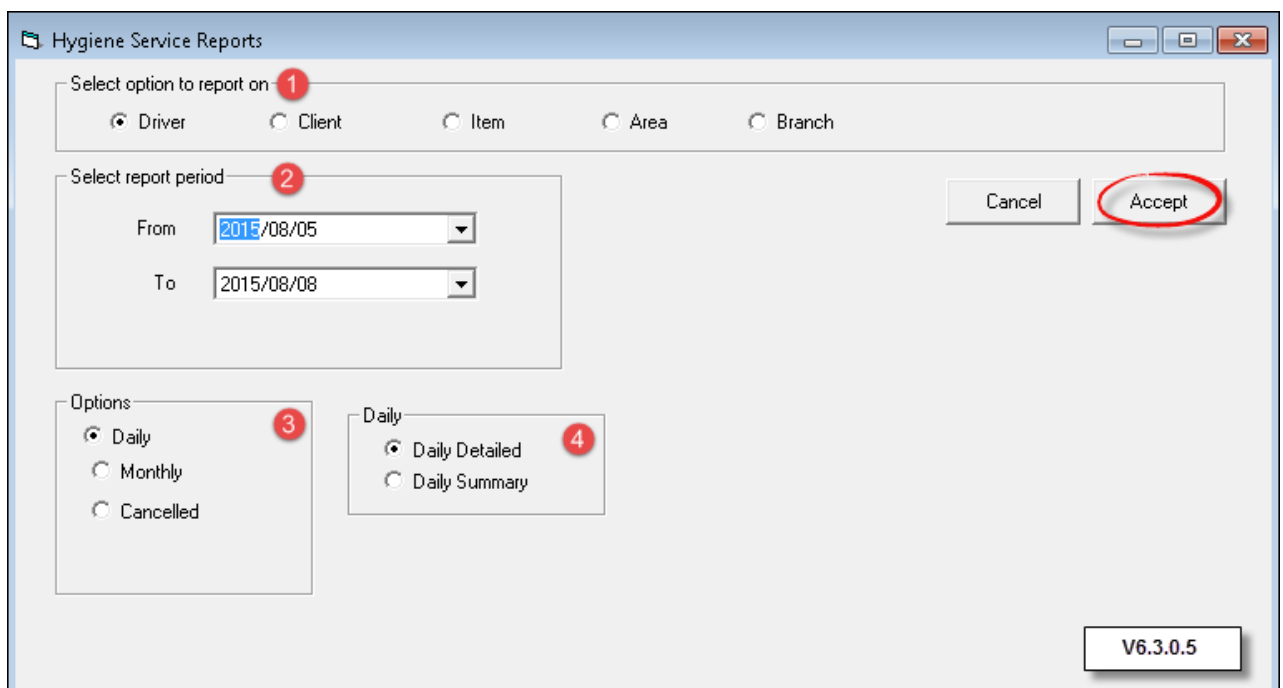
1. Select the option to report on:

- Driver
- Client
- Item
- Area
- Branch

2. Enter the period to report on

3. Select either the Daily, Monthly or Cancelled option

4. Select whether the report must be Detailed or in Summary format, and click "Accept" for the report to be displayed



## 15 Step 14 - Returning and Invoicing an Item

- An "Item" will be invoiced when it is returned. Double click on the applicable contract for which the "Item" is to be returned, and click on "Edit" when the contract opens

Contract Details V6.3.0.5

Contract Volume #: 18 20150805 Contract Number: 18

Customer Code: J00001 Johnson Construction No Category

Site Number: J00001/004 14 Hessop Street - House Building Site Last Increment Date: 2015/08/11

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

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

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
41	ZGR00...	Deposit - 0.00		0.00	0.00	N	On Rent	Collect	0	0	0	0.00	0	0	0.00	7.00	0.00	0.00
42	06002001	Unit 2 - VIP Toilet Trailer, ...		114.00	684.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00
43	11003001	Unit 3 - Single Toilet, Blue ...		57.00	342.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00
44	11004001	Unit 4 - Single Toilet, Blue ...		57.00	342.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00

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

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

Reports to: Screen Print POS Print to: Screen Print

Refund Charge Contract Summary Delivery Note Return Note Close

**Edit**

- In the "Hire Item" tab, click on "Return"

Contract Details V6.3.0.5

Contract Volume #: 18 20150805 Contract Number: 18

Customer Code: J00001 Johnson Construction No Category

Site Number: J00001/004 14 Hessop Street - House Building Site Last Increment Date: 2015/08/11

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

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

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
41	ZGR00...	Deposit - 0.00		0.00	0.00	N	On Rent	Collect	0	0	0	0.00	0	0	0.00	7.00	0.00	0.00
42	06002001	Unit 2 - VIP Toilet Trailer, ...		114.00	684.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00
43	11003001	Unit 3 - Single Toilet, Blue ...		57.00	342.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00
44	11004001	Unit 4 - Single Toilet, Blue ...		57.00	342.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00

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

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

Reports to: Screen Print POS Print to: Screen Print

Refund Charge Contract Summary Delivery Note Return Note Close

Save Cancel

- Check-boxes next to each "Item" will be activated, and the "Items" to be returned must be selected. In this case, all of the "Items" will be returned
- The option of "Action - Return" will be inserted automatically. Now click on "Apply Selection"

Contract Details

Contract Volume #: 18      20150805      Contract Number: 18


Customer Code: JO0001      Johnson Construction      No Category

Site Number: JO0001/004      14 Hessop Street - House Building Site      Last Increment Date: 2015/08/11

Branch: Mossel Bay, Mossel Bay      Monthly Container Hire

Item Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
<input checked="" type="checkbox"/>	41	ZGR00...	Deposit - 0.00	0.00	0.00	N	On Rent	Collect	0	0	0	0.00	0	0	0.00	7.00	0.00	0.00
<input checked="" type="checkbox"/>	42	06002001	Unit 2 - VIP Toilet Trailer ....	114.00	684.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00
<input checked="" type="checkbox"/>	43	11003001	Unit 3 - Single Toilet, Blue ...	57.00	342.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00
<input checked="" type="checkbox"/>	44	11004001	Unit 4 - Single Toilet, Blue ...	57.00	342.00	N	On Rent	Collect	1	1	0	0.00	0	0	0.00	6.00	0.00	0.00

V6.3.0.5

Display <F1>    Add New <F3>    Remove <F4>    Action - Return     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

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

1. The "Select Return Date" window will appear for each of the "Items". The first "Item" is "Unit 2 - VIP Toilet Trailer"
2. The date and time the "Item" was rented will be displayed next to "Date Out", and cannot be edited. The date and time when the "Item" is returned, will be the current date and time - but can be adjusted if needed
3. The "Hire Day Total" will be entered according to the "Date In and Date Out" calculation of days
4. The "Daily Rate" will display as set up
5. In order to "Add" or "Subtract" days for this "Item", click on the appropriate option and enter the numeric value. The adjusted quantity and hire days will be entered
6. Should the "Item" be damaged beyond repair, and the "Customer" is billed for the replacement thereof, enter the "Replacement Quantity" (1) and enter the "Replacement @ Cost". This amount will be found in the "Item Master File" where the cost price was entered when the "Item" was created
7. Should the "Item" need repairs, enter the "Repair Fee" the "Customer" is liable for
8. In the event where the "Item" was returned later than agreed, tick the "Late Return" check-box, and either select: "Charge Extra Fee", or "No Penalty for Late Return"
9. Enter any notes pertaining to the return of this "Item" and click "Accept" in order to return this "Item"

The screenshot shows the 'Select Return Date' window for 'Unit 2 - VIP Toilet Trailer, Blue Loo, 1'. The window contains the following fields and controls:

- 1**: Item description: 1 -- Unit 2 - VIP Toilet Trailer, Blue Loo, 1
- 2**: Date Out: 2015/08/05 15:44
- 2**: Date In: 2015/08/11 09:23
- 2**: Time Out: 06:20
- 3**: Changeover (Swop Item) checkbox (unchecked)
- 3**: Table of totals:
 

Saturday Total	0.00
Sunday Total	0.00
Holiday Total	0.00
Off-Hire Total	0.00
Hire Day Total	6.00
- 4**: Daily Rate: 114.00
- 5**: Hire Day Adjustment section:
  - Subtract: ☒ (selected)
  - Add: ☐
  - Adjustment Quantity: 0
  - Adjusted Hire Day: 0.00
  - Adjustment Value: 0.00
- 6**: Replacement Quantity: 0
- 6**: Replacement @ Cost: 0.00
- 7**: Repair Fee: 0.00
- 8**: Late Return checkbox (checked)
- 8**: Charge Extra Fee @ 0.00 (radio button)
- 8**: No Penalty for Late Return (radio button)
- 9**: Notes field (empty)
- 9**: Accept button (circled in red)
- 9**: Cancel button
- 9**: Version: V6.3.0.5

- Immediately the **"Select Return Date"** window will appear to administrate the next **"Item"** to be returned

Select Return Date

5 -- Unit 3 - Single Toilet, Blue Loo, 5

Date Out : 2015/08/05 15:44

Date In : 2015/08/11 10:05 Time Out - 05:39

- The process will be repeated for each **"Item"** selected to be returned in the **"Hire Item"** tab

Select Return Date

5 -- Unit 4 - Single Toilet, Blue Loo, 5

Date Out : 2015/08/05 15:44

Date In : 2015/08/11 10:09 Time Out - 05:34

- The **"Items"** will now be locked and cannot be edited unless a **"Credit Note"** is issued. Notice how the **"Status"** for each **"Item"** has been changed to **"Returned"**
- Click on **"Invoice"**

Contract Details V6.3.0.5

Contract Volume #: 18 20150805 Contract Number: 18

Customer Code: J00001 Johnson Construction No Category

Site Number: J00001/004 14 Hessop Street - House Building Site Last Increment Date: 2015/08/11

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

General	Hire Item	Non-Serial	Non-Rentals	Deposits	Payment	Detail View	Financial											
Hire Item	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
41	ZGR00...	Deposit - 0.00		0.00	0.00	N	Returned	Collect	0	0	0	0.00	0	0	0.00	7.00	0.00	0.00
42	06002001	Unit 2 - VIP Toilet Trailer , ...		114.00	684.00	N	Returned	Collect	1	0	0	0.00	0	0	0.00	6.00	0.00	0.00
43	11003001	Unit 3 - Single Toilet, Blue ...		57.00	342.00	N	Returned	Collect	1	0	0	0.00	0	0	0.00	6.00	0.00	0.00
44	11004001	Unit 4 - Single Toilet, Blue ...		57.00	342.00	N	Returned	Collect	1	0	0	0.00	0	0	0.00	6.00	0.00	0.00

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

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

Reports to: Screen Print POS Print to: Screen Print

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



- Click on "Close" to exit the "Contract Details" screen

Contract Details V6.3.0.5

Contract Volume #: 18 20150805 Contract Number: 18

Customer Code: JO0001 Johnson Construction No Category

Site Number: JO0001/004 14 Hessop Street - House Building Site Last Increment Date: 2015/08/11

Branch: Mossel Bay, Mossel Bay Monthly Container Hire

Hire Num	Item Code	Item Desc	Tariff Code	Rate PD	Total Incl	RA	Status	Deliver	Issue	Bal	IP	OHD	S	P	HDA	HD	Rate PH	Hours
41	ZGR00...	Deposit - 0.00		0.00	0.00	N	Returned	Collect	0	0	0	0.00	0	0	0.00	7.00	0.00	0.00
42	06002001	Unit 2 - VIP Toilet Trailer , ...		114.00	684.00	N	Returned	Collect	1	0	0	0.00	0	0	0.00	6.00	0.00	0.00
43	11003001	Unit 3 - Single Toilet, Blue ...		57.00	342.00	N	Returned	Collect	1	0	0	0.00	0	0	0.00	6.00	0.00	0.00
44	11004001	Unit 4 - Single Toilet, Blue ...		57.00	342.00	N	Returned	Collect	1	0	0	0.00	0	0	0.00	6.00	0.00	0.00

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

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

Reports to: Screen Print PDS Print to: Screen Print

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

- The contract color on the Grid has turned pink - the color of the "Returned" status. The "Contract Balance" for this "Customer" is displayed in the "Blue and Black Block"

Novtel Equipment Hire Professional 6.3.0.5 - [Item Grid]

File Edit Modify Setup Process Reports Help

05 Aug 2015 06 Aug 2015 07 Aug 2015 08 Aug 2015 09 Aug 2015 10 Aug 2015 11 Aug 2015 12 Aug 2015 13 Aug 2015 14 Aug 2015 15 Aug 2015 16 Aug 2015 17 Aug 2015 18 Aug 2015 19 Aug 2015 20 Aug 2015 21 Aug 2015 22 Aug 2015 23 Aug 2015 24 Aug 2015 25 Aug 2015 26 Aug 2015 27 Aug 2015 28 Aug 2015 29 Aug 2015 30 Aug 2015 31 Aug 2015 01 Sep 2015 02 Sep 2015 03 Sep 2015 04 Sep 2015 05 Sep 2015 06 Sep 2015 07 Sep 2015 08 Sep 2015 09 Sep 2015 10 Sep 2015 11 Sep 2015 12 Sep 2015 13 Sep 2015 14 Sep 2015 15 Sep 2015 16 Sep 2015 17 Sep 2015 18 Sep 2015

08002001 11003001 43 Johnson Construction 11004001 44 Johnson Construction

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

2015/08/05 2015/09/18

Contract 18 Vol 18 20150805

PD Box 123 Mossel Bay 6500 johnson@construction.co.za

Mobile Phone: 081 695 123 456 Fax: 044 695 123 456 Telephone: 044 695 123 456

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 Paid: 0.00 Contract Invoice Total: 0.00 Contract Receipt Total: 0.00 Contract Dep Forfeit: 0.00 Contract Dep Refund: 0.00 Contract Balance: 1731.00

Cancelled Provisional Confirmed On Rent Returned Fully Paid Non Rev

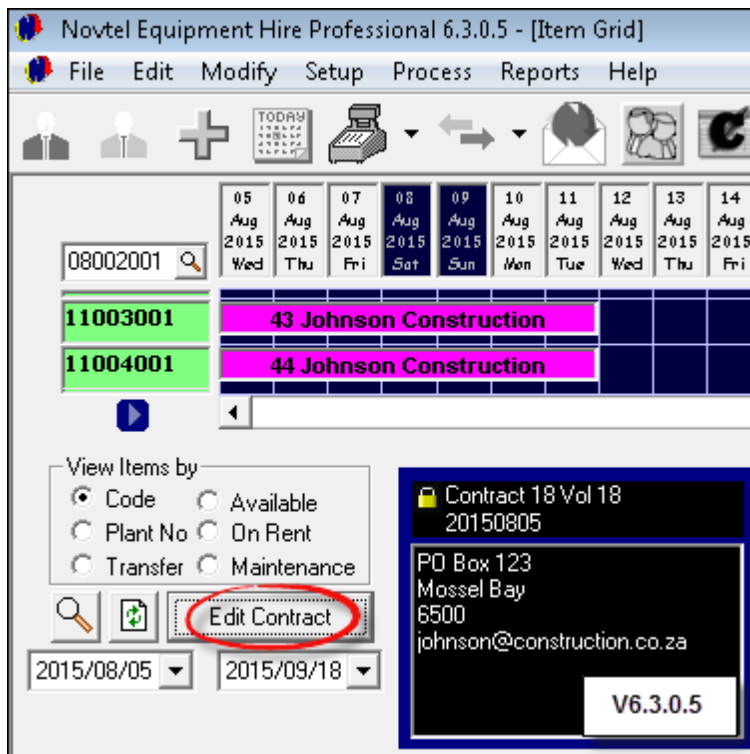
User: James Database Path: C:\Users\Louise\NovtelData\EquipmentHire\Live\T Pastel Path: C:\Pastel14\NOVTDEMO

10:56 AM 2015/08/11

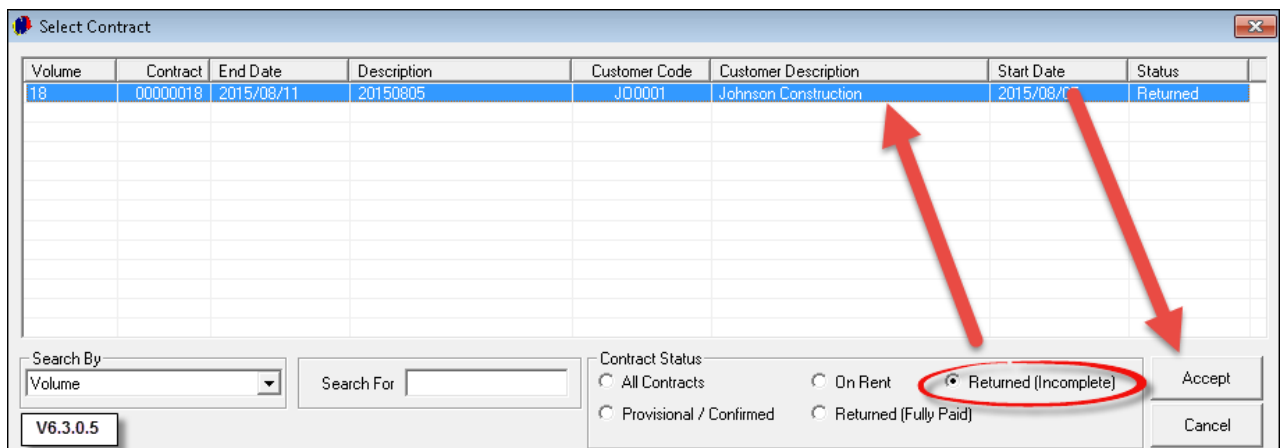


## 16 Step 15 - Account Payments

- For demonstration purposes, we will receive an account payment on "**Contract 18**". Double click on the contract on the Grid, or click on the "**Edit Contract**" button



- Click on the "**Returned (Incomplete)**" option. All contracts where the "**Items**" have been returned but not paid for in full, will appear in this window. Click on the contract and then "**Accept**"



- In the "Payment" tab, the outstanding amount will be displayed in red. Click on "Contract Payment"

**Contract Details**

Contract Volume #	18	20150805	Contract Number:	<b>18</b>
Customer Code :	JD0001	Johnson Construction	No Category	
Site Number :	JD0001/004	14 Hessop Street - House Building Site	Last Increment Date :	2015/08/11
Branch	Mossel Bay, Mossel Bay		Monthly Container Hire	

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

Code	Description	Dur	Qty	Tax	Inclusive
06002001	Unit 2 - VIP Toilet Trailer, Blue Loo, 1	6	1	84.00	684.00
11003001	Unit 3 - Single Toilet, Blue Loo, 5	6	1	42.00	342.00
11004001	Unit 4 - Single Toilet, Blue Loo, 5	6	1	42.00	342.00
-	Additional Costs			44.58	363.00

DEPOSIT PAID	CREDIT NOTE
0.00	0.00
INVOICE TOTAL	C N REFUND
1731.00	0.00
RECEIPT TOTAL	Recalculate Totals
0.00	
DEPOSIT REFUND	Refund Deposit
0.00	
DEPOSIT FORFEIT	Refund Due
0.00	
PAYMENT DUE	<b>Contract Payment</b>
★ 1731.00	

V6.3.0.5

1. All outstanding amounts connected to this contract will be displayed in the left hand side of the window
2. The contract number; "**Customer Description**" and "**Payment Due**" amount is inserted automatically
3. Select the "**Payment Type**". When "**Bank Transfer; Credit Card or Cheque**" is selected, the "**Payment Received**" amount will be entered automatically (This will be the exact "**Payment Due**" amount). Should the "**Cash**" option be selected, enter the "**Payment Received**" amount. The system will calculate the "**Customer Change**" amount
4. Click "**Accept**" in order to print the receipt

**Contract Payments**

Selected Item(s):

Code	Description	Dur	Qty	Tax	Inclusive
06002...	Unit 2 - VIP Toilet Traile...	6	1	84.00	684.00
11003...	Unit 3 - Single Toilet, Bl...	6	1	42.00	342.00
11004...	Unit 4 - Single Toilet, Bl...	6	1	42.00	342.00
SER003	Service Charge for VIP ...	0	4	9.82	80.00
SER007	Service Charge Single ...	0	8	19.65	160.00
AIR001	Airfreshner Spray 375ml	0	1	2.58	21.00
SOA001	Liquid Hand Soap 700...	0	2	11.05	90.00
TOI001	Toilet Paper 1 Ply per roll	0	4	1.47	12.00

History:

☒ On Plant ☐ 3 Month ☐ All

☐ Hire Number

☒ Contract Vol Number

Contract Vol #: 18

Customer Description: JO0001 - Johnson Construction

Payment Type: Bank Transfer

Payment Date: 2015/08/11

Bank Account Number: 12121212121

Bank Type: ABSA

Status Returned:

Payment Received: 1731.00

Change: 0.00

**PAYMENT DUE**

**1731.00**

Print to: Screen Print

User: James Shift #: SFT00001

Cashbook: 0

GL Account: 8100/000

Daily Taking Control

**<F2> - Accept**

V6.3.0.5

Close

**Novtel Toilet Hire**

30 Diaz Office Park

Beach Boulevard

Diaz Beach

Mossel Bay

Tel : 0861 66 8835

Fax : 0861 66 8835

VAT :1234

**RECEIPT**

Cust Description : Johnson Construction

Cust Code : JO0001

Contract Vol 18

Payment Type : Daily Taking Control

Payment Due : 1731.00

Payment Received : 1731.00

Change : 0.00

Staff member : James

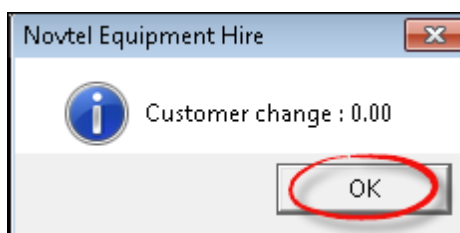
Payment Date : 2015/08/11

Print Date : 2015/08/11

Time : 12:57:48 PM

Shift Number : SFT00001

Receipt Number : REC00015

**Thank You.**

- The **"Payment Due"** amount is now zero and displayed in green - indicating that the account is paid in full
- Click **"Save"** and then **"Close"** in order to exit the **"Contract Details"** window

**Contract Details**

Contract Volume #: 18    20150805    Contract Number: 18

Customer Code: JO0001    Johnson Construction    No Category

Site Number: JO0001/004    14 Hessop Street - House Building Site    Last Increment Date: 2015/08/11

Branch: Mossel Bay, Mossel Bay    Monthly Container Hire

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

Code	Description	Dur	Qty	Tax	Inclusive
06002001	Unit 2 - VIP Toilet Trailer, Blue Loo, 1	6	1	84.00	684.00
11003001	Unit 3 - Single Toilet, Blue Loo, 5	6	1	42.00	342.00
11004001	Unit 4 - Single Toilet, Blue Loo, 5	6	1	42.00	342.00
-	Additional Costs			44.58	363.00
-	Payments Made			0	-1731.00

DEPOSIT PAID: 0.00    CREDIT NOTE: 0.00

INVOICE TOTAL: 1731.00    C N REFUND: 0.00

RECEIPT TOTAL: 1731.00    Recalculate Totals

DEPOSIT REFUND: 0.00    Refund Deposit

DEPOSIT FORFEIT: 0.00    Refund Due

PAYMENT DUE: 0.00    Contract Payment

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

- The Contract colour on the Grid is now green - the colour of the **"Fully Paid"** status, and the **"Contract Balance"** in the **"Blue and Black Block"** is now zero since the **"Receipt Total"** has been recorded

**Novtel Equipment Hire Professional 6.3.0.5 - [Item Grid]**

File    Edit    Modify    Setup    Process    Reports    Help

05 Aug 2015    06 Aug 2015    07 Aug 2015    08 Aug 2015    09 Aug 2015    10 Aug 2015    11 Aug 2015    12 Aug 2015    13 Aug 2015    14 Aug 2015    15 Aug 2015    16 Aug 2015    17 Aug 2015    18 Aug 2015    19 Aug 2015    20 Aug 2015    21 Aug 2015    22 Aug 2015    23 Aug 2015    24 Aug 2015    25 Aug 2015    26 Aug 2015    27 Aug 2015    28 Aug 2015    29 Aug 2015    30 Aug 2015    31 Aug 2015    01 Sep 2015    02 Sep 2015    V6.3.0.5

11003001	43 Johnson Construction	
11004001	44 Johnson Construction	
11005001	50 Johnson Construction	
11006001	52 Johnson Construction	

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

2015/08/05    2015/09/18    Edit Contract

Contract 18 Vol 18 20150805

PO Box 123 Mossel Bay 6500 johnson@construction.co.za

Mobile Phone: 081 695 123 456    Credit Note: 0.00

Fax: 044 695 123 456    Contract Dep Paid: 0.00

Telephone: 044 695 123 456    Contract Invoice Total: 1731.00

User Defined Field 1    Contract Receipt Total: 1731.00

User Defined Field 2    Contract Dep Forfeit: 0.00

User Defined Field 3    Contract Dep Refund: 0.00

User Defined Field 4    Contract Balance: 0.00

User Defined Field 5

Cancelled    Provisional    Confirmed    On Rent    Returned    Fully Paid    Non Rev

User: James    Database Path: C:\Users\Louise\NovtelData\EquipmentHire\Live\T    Pastel Path: C:\Pastel14\NOVTEMO

01:16 PM 2015/08/11

## 17 Step 16 - Deposit Refunds

Whenever a deposit amount exceeds the amount the **"Customer"** is liable for - after the **"Recurring Billing"** and **"Hygiene Service Management"** has been done for the rental period and until the **"Item"** was returned - that portion of the deposit can be refunded

1. Click on **"Edit Contract"** beneath the Grid
2. Deposits will only be refunded if the **"Item"** was returned in good order. Click the **"Returned (Incomplete)"** option
3. Click on the applicable contract and click **"Accept"**

Novtel Equipment Hire Professional 6.3.0.5 - [Item Grid]

File Edit Modify Setup Process Reports Help

V6.3.0.5

06002001 42 Johnson C

06003001

08003001

09001001 46 Parties

09002001 47 Parties

09003001

View Items by:

Code Available

Plant No On Rent

Transfer Maintenance

1 Edit Contract

2015/08/05 2015/09/18

Select Contract

Volume	Contract	End Date	Description	Customer Code	Customer Description	Start Date	Status
14	00000014	2015/08/11	20150805	PE0001	Perfect Weddings	2015/08/05	Returned

Search By

Search For 14

Contract Status

All Contracts On Rent

Provisional / Confirmed Returned (Fully Paid)

Returned (Incomplete)

Accept

Cancel

Weddings@perfect.com

User Defined Field 2

User Defined Field 3

User Defined Field 4

User Defined Field 5

Contract Dep Forfeit 0.00

Contract Dep Refund 0.00

Contract Balance -418.00

- In this case, the deposit paid was R1140.00 and the invoice total is R722.00. The difference of R418.00 must therefore be paid to the **"Customer"**. Click on **"Refund Deposit"** in the **"Payment"** tab

Contract Details

Contract Volume #: 14 20150805

Customer Code: PE0001 Perfect Weddings

Site Number: PE0001/002 The Venue Guest Farm

Branch: Mossel Bay, Mossel Bay

Contract Number: 14

No Category

Last Increment Date: 2015/08/11

Monthly Container Hire

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

Code	Description	Dur	Qty	Tax	Inclusive
06004001	Unit 4 - VIP Toilet Trailer, Blue Loo, 1	6	1	84.00	684.00
-	Additional Costs			4.67	38.00
-	Payments Made			0	-1140.00

DEPOSIT PAID 1140.00

INVOICE TOTAL 722.00

RECEIPT TOTAL 1140.00

DEPOSIT REFUND 0.00

DEPOSIT FORFEIT 0.00

PAYMENT DUE -418.00

CREDIT NOTE 0.00

C N REFUND 0.00

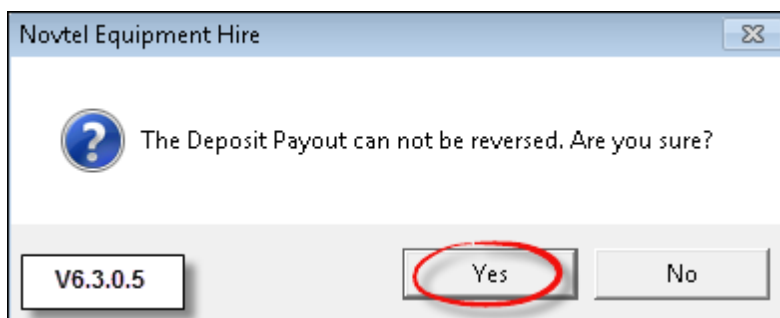
Recalculate Totals

Refund Deposit

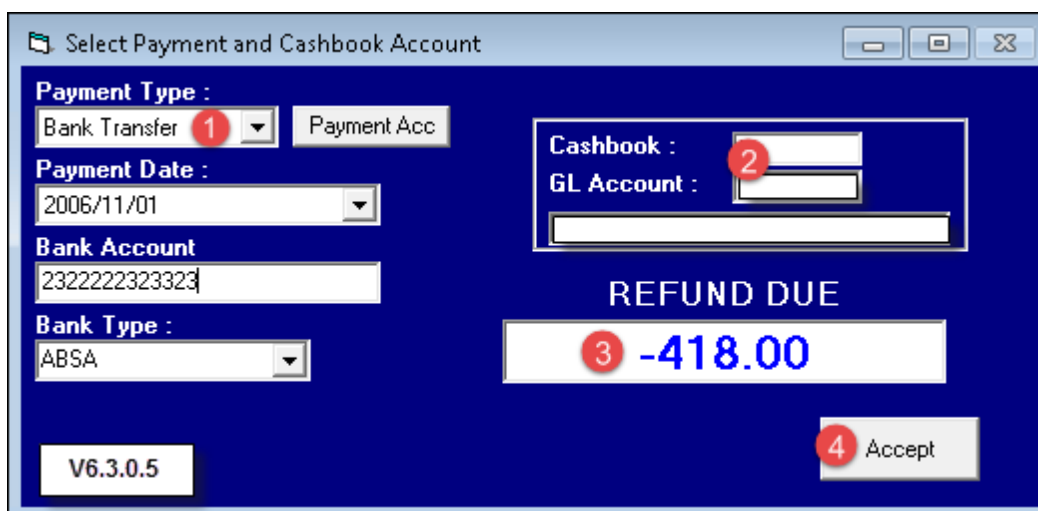
Refund Due

Contract Payment

V6.3.0.5



1. Select the "**Payment Type**" and date, and enter all other details pertaining to the "**Payment Type**"
2. The "**Cashbook**" and "**GL Account**" is set up in "**Setup - Interfaces - Pastel - POS**" tab. Those details will appear in these fields
3. The "**Refund Due**" amount is entered automatically
4. Click "**Accept**" to complete the transaction

A screenshot of a Windows-style dialog box titled "Select Payment and Cashbook Account". The dialog has a blue background. On the left, there are several fields: "Payment Type" (a dropdown menu with "Bank Transfer" selected, marked with a red circle 1), "Payment Date" (a date field showing "2006/11/01"), "Bank Account" (a text field containing "2322222323323"), and "Bank Type" (a dropdown menu with "ABSA" selected). On the right, there are two more fields: "Cashbook" (a text field, marked with a red circle 2) and "GL Account" (a text field). Below these fields, the text "REFUND DUE" is displayed in white. Underneath, a large white box shows the amount "-418.00" in blue, with a red circle 3 next to it. At the bottom right, there is an "Accept" button, marked with a red circle 4. A version number "V6.3.0.5" is displayed in the bottom left corner.

- The "Deposit Refund" receipt will print

**Novtel Toilet Hire**

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Beach Boulevard  
Diaz Beach  
Mosel Bay  
Tel : 0861 66 8835  
Fax : 0861 66 8835  
VAT : 1234

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**DEPOSIT REFUND**

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Contract            14  
Customer          PE0001 - Perfect Weddings  
Volume            14

Refund Deposit:        418.00

Staffmember :        James  
Payment Date :        2015/08/11  
Print Date :            2015/08/11  
Time :                02:39:52 PM  
Shift Number :        SFT00001  
Deposit Refund No :    DEP00009

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Thank You.

- The details of the refund has been added to the "Payment" window

**Contract Details**

Contract Volume # 14 20150805 Contract Number: 14  
Customer Code : PE0001 Perfect Weddings No Category  
Site Number : PE0001/002 The Venue Guest Farm Last Increment Date : 2015/08/11  
Branch Mossel Bay, Mossel Bay Monthly Container Hire

Code	Description	Dur	Qty	Tax	Inclusive
-	Deposit Applied			0.00	-1140.00
-	Deposit Refund				418.00
06004001	Unit 4 - VIP Toilet Trailer, Blue Loo, 1	6	1	84.00	684.00
-	Additional Costs			4.67	38.00
-	Payments Made			0	-1140.00

**DEPOSIT PAID** 1140.00  
**INVOICE TOTAL** 722.00  
**RECEIPT TOTAL** 1140.00  
**DEPOSIT REFUND** 418.00  
**DEPOSIT FORFEIT** 0.00  
**PAYMENT DUE** 0.00

**CREDIT NOTE** 0.00  
**C N REFUND** 0.00  
Recalculate Totals  
Refund Deposit  
Refund Due  
Contract Payment

Reports to : Screen Print PDS Print to : Screen Print  
Edit Credit Note Refund Charge Invoice Contract Summary Delivery Note Return Note Close





## OUR PRODUCTS

Our Sage Pastel integrating software include products for:

- Property Management
- Vehicle Hire\*
- Self-Storage\*
- Equipment Hire\*
- Relations Management\*
- Contract Management\*
- Hospitality\*
- Point of Sale: Retail\*
- Point of Sale: Restaurant\*
- Gate / Facility Access Control\*

\* Can also be used as stand-alone applications

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## OUR WEB PORTALS

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**PROPERTY ONLINE**  
A NOVTEL COMPANY



Global Property Online and Country related Website Portals are the marketing medium between Estate Agents / Private Owners and Property Buyers / Renters. These Portals also include an Online CRM (Customer Relations Management) System:

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- Buy Property in Spain – [www.buypropertyinspain.net](http://www.buypropertyinspain.net)
- Property in Portugal for sale – [www.propertyinportugalforsale.com](http://www.propertyinportugalforsale.com)
- Australia Property – [www.australia-property.net](http://www.australia-property.net)
- BLOG – [www.blog.globalpropertyonline.net](http://www.blog.globalpropertyonline.net)