Novtel®

7 STEPS TO

Mastering the Basics

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RELATIONS MANAGEMENT

Table of Contents

1   Key Features of Relations Management

Staff Management

- Globally manage and monitor staff
- Manage the productivity of managers and employees' daily schedules and tasks at hand
- Monitor and control all issues in the organisation that needs to be resolved and acted upon
- Automatically organises, seamlessly and in a timely manner
- Helps you to deal with queries and problems within a strict set time-frame (auto reminder system)

Customer and Supplier Management

- Allows you to create your own categories and group Customers and Suppliers as you wish
- Enables you to send bulk communication e-mails or sms's to filtered groups
- Send instant newsletters, price lists, final payment notices or any other types of communication to your personnel, customers, members, tenants, landlords or suppliers within seconds
- Builds a history of communication and interaction with each Customer and Supplier (e-mails, sms's, calls, notes, meetings, visits, etc)
- Allows the effective control of (paperless) records

Novtel Relations Management will help your organisation take control of all communications and interaction activities as it happens.

2   Getting Started

Downloading and installing

Click on "**Run**", then "**Next**" and "**Accept the Terms of the License Agreement**"
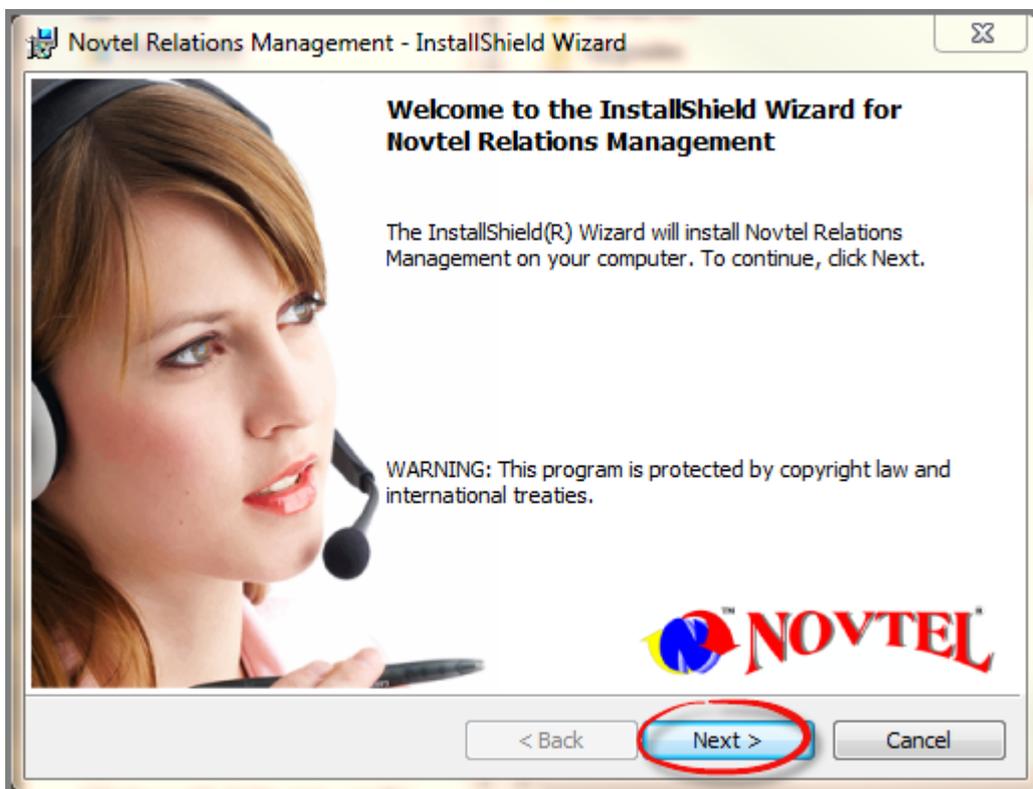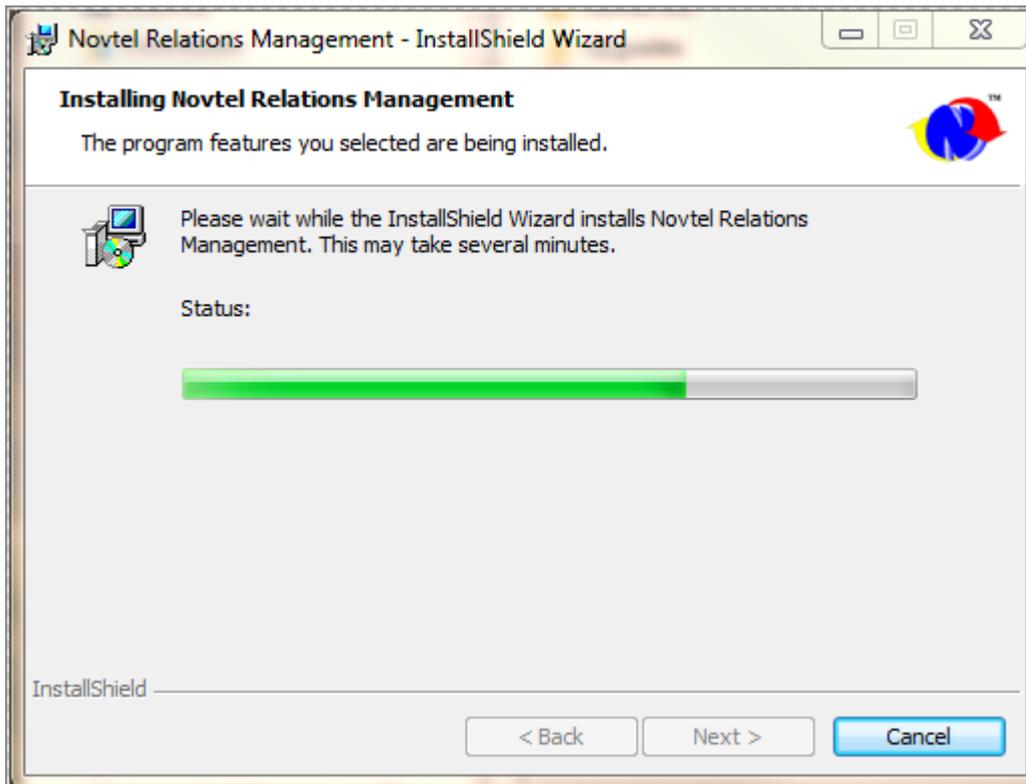
When the installation is done, click on "**Finish**"

On the desktop, click the Novtel Relations Management Icon. Enter all the relevant details on the Novtel Relations Management Registration Screen. Be sure to enter your valid e-mail address, since an e-mail will be sent with an activation code which you must enter in order to be able to work. Then click on "**Register**"

Free Lite Registration Renewal

**Thank You For Registering
Novtel Relations Management**

In order to ensure your email is valid, an activation
code has been emailed to:
louise.jvv@novtel.com

If you have trouble locating the email, please check
your spam folder or click the button below to
send the activation email again:

[Resend email]

Once you have received your activatation code,
enter it into the area below and click Activate.

Activation Code:

Registrations/Activations skipped: 0 (maximum 10)

[Activate Later]   [Activate]

2.1   Introduction and the Novtel List

For demonstration purposes, our company is part of the Property Sector. We have created a list of fictional "**Suppliers**" and "**Customers**". In this case, the owner of the property is the "**Supplier**"

Owner 1
Mr Vernon Black
789 Rodeo Drive
Constantia
8989
Cell: 088 789 4561
vblack@hotmail.com

Property 1 for Rent
Residential Long Term Lease
17 Mountain Rd
Constantia
8989
Tenant: Mr Shawn Andrews
089 369 2581
shawna@gmail.com

Property 2 for Rent
Long Term Commercial Lease
Shop 47, Maritz Building
Voortrekker Road, Waterfront
Tenant: Bargain Clothing
Mr George Martins
088 0123 456
bargainclothing@capetown.co.za

Owner 2
Mr Ken Marshall
36 Denver Street
Cape Town
8500
077 458 2496
kenmar@telkomsa.net

Property 1 for Rent
Holiday Rental for 5 days
719 Beacon Island Holiday Flats
Newlands Drive
Newlands, 1778
Tenant: Mr Jan Groenewald
7 Beaver Road
Centurion
077 8521 369
jangroen@xsinet.com

Property 2 for Rent
Holiday Rental for 12 Days
608 Beacon Island Holiday Flats
Newlands Drive
Newlands, 1778
Tenant: Mrs Jane Louw
5 Salmon Street
Pretoria
077 1951 591
janelouw@hotmail.com

Owner 3

Malan Development

Mr James Malan

24 Scholtz Street

Claremont

8500

088 7894 561

malan@development.co.za

Property 1 for Rent

Long Term Industrial Lease

55 Sunset Cresent

Unit 3

Industrial Park

Rondebosch

8555

Tenant: Mr Frank Rowlands

Uniforms Manufacturers CC

088 555 5555

uniforms@manufacturers.co.za

Property 2 for Rent

Long Term Industrial Lease

55 Sunset Cresent

Unit 4

Industrial Park

Rondebosh

8555

Tenant: Mr Stuart Taylor

Taylor Engineering

099 3692 558

stuart@tayloreng.co.za

Owner 4

Luke Upton

14 Peanut Road

Newlands

6589

099 3571 593

lupton@gmail.com

Property 1 for Rent

Long Term Residential Lease

40 Seafront Drive

Green Stone Golf Estate

Foreshore

9000

Tenant: Mr Jeff Viljoen

088 664 4466

jeffv@gmail.co.za

Property 2 for Rent

Holiday Rental for 21 Days

42 Seefront Drive

Green Stone Golf Estate

Foreshore

9000

Tenant: Mr David Fourie

14 Laing Street, Plettenberg Bay

088 664 77 5588

davidf@gmail.co.za

Owner 5

Franklin Group

Douglas Franklin

25 Hope Street

Cape Town

8000

077 777 4433

property@franklingroup.co.za

Property 1 for Rent

Long Term Commercial Lease

44 Grey Street

Shop 7

Commercial Park

Constantia

Tenant: Mr John Wilson

Constantia Art and Craft Supplies

077 2589 357

johnwilson@art.co.za

Property 2 for Rent

Long Term Industrial Lease

Fairview Street

Building 2

The Hope Industrial Complex

Tokai

Tenant: Mr Willem Visser

Duvet and Pillow Manufacturers

099 1234 567

willem@dpm.co.za

Owner 6

Jake Rademan

10 Fletcher Street

Newlands

4567

088 55 66 444

jake@gmail.com

Property 1 for Rent

Long Term Residential Lease

43 Park Street

Bellville

2589

Tenant: Mr Dave Snell

099 111 22 33

ds@hotmail.com

Property 2 for Rent

Long Term Residential Lease

32 Mimosa Ave

Newlands

5689

Tenants: Mr JJ du Randt

097 999 8887

jjdr@gmail.com

Properties for Sale

Owner 7	**Owner 8**
Werner Espin	Lang and Partners
099 444 55 11	099 333 44 55
werner.e@telkomsa.net	robertlang@partners.com
The Blue Dolphin Holiday Flats	Mr Robert Lang
Nr 7	Warehouse 4
Bluebell Street	Harry Circle
Newlands	Woodstock

Owner 9	**Owner 10**
Stan Carr	Mr Steve Button
088 999 4455	088 999 7777
scarr@telkomsa.net	steveb@gmail.com
Carr Place	11 Sampson Street
Shop 7	Newlands
Queen Road	5566
Bellville	
8877	

3   Step 1 - Setup

Company Setup

Click on "**Setup**" and then "**Company**" on the top menu. This is to setup your own company details

- On the "**General**" Tab, be sure to enter "**200**" for the maximum emails to be sent at one time, otherwise it could be reported as Spam
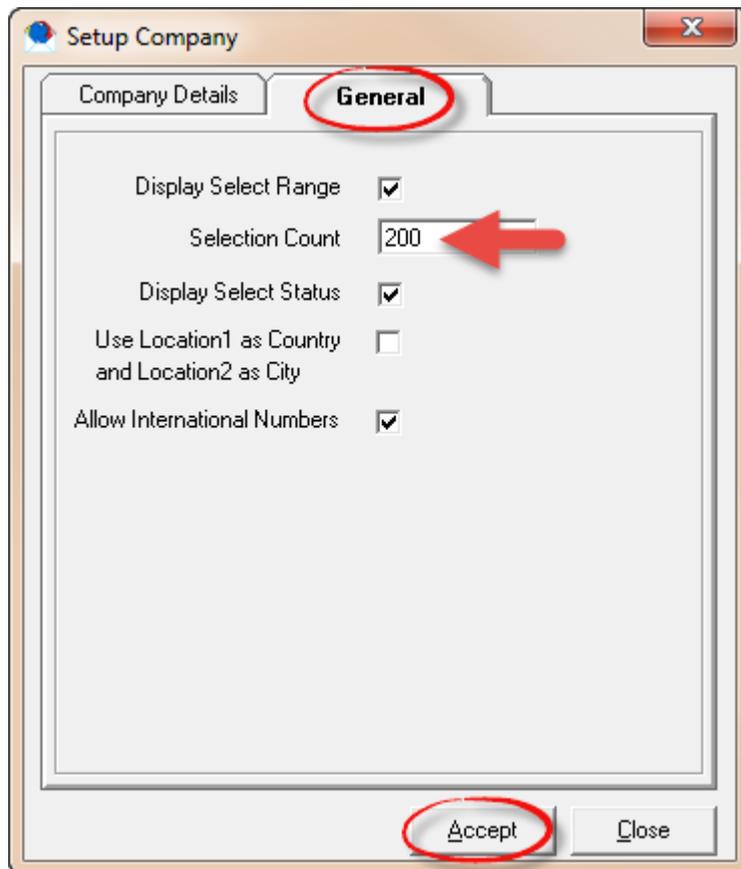
3.1   Setup Categories

Each business will use it's own unique "**Categories**" and "**Statuses**" to work with. For instance: "**Categories**" and "**Statuses**" in a Property Business will be totally different from those in the Vehicle Hire Industry. Here you can plan how you want to set it up in order to fit your business best, and to enable you to manage your business and clients efficiently

Supplier Categories

The following "**Categories**" can be used as reference:
- Sales - Private
- Sales - Agency
- Long term rental - Private
- Long term rental - Agency
- Holiday / Short stay - Private
- Holiday / Short stay - Agency

Click "**Edit**" on the top menu, and then "**Supplier Categories**"
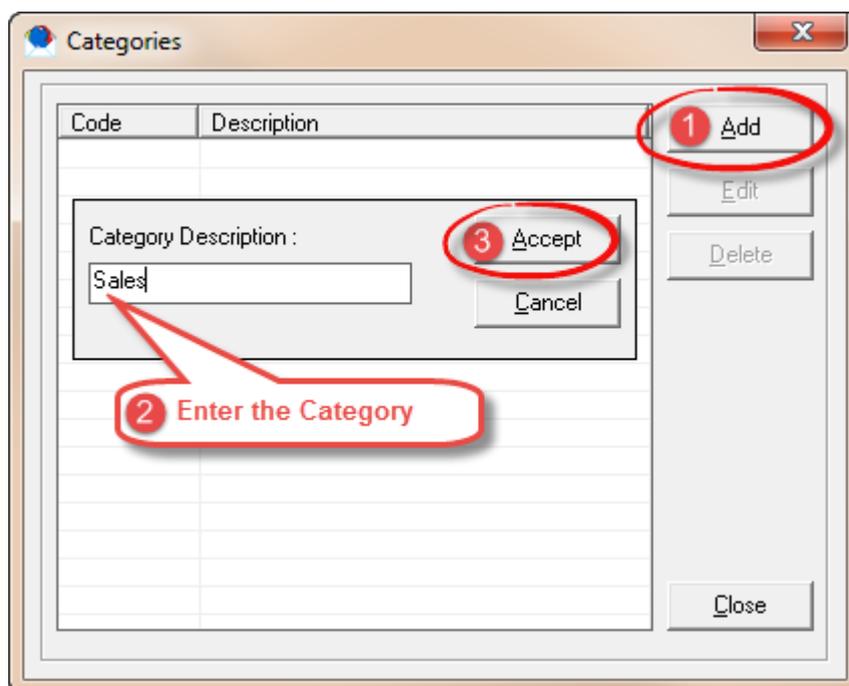
Customer Categories

Click "**Edit**" on the top menu, and then "**Customer Categories**"
- Residential Rental
- Bed and Breakfast
- Hotel
- Holiday Flat
- Long Term Industrial Rental
- Long Term Commercial Rental

3.2   Setup Statuses

There are 3 main "**Statuses**" to be created. The purpose is to determine what we have done with each individual account at any given time. Remember that the same principle applies for both "**Supplier**" and "**Customer Statuses**"

- Account Status
- Account Type
- Expiry Date

Click on "**Setup**", "**Status**", "**Status Description**" and then "**Add**"
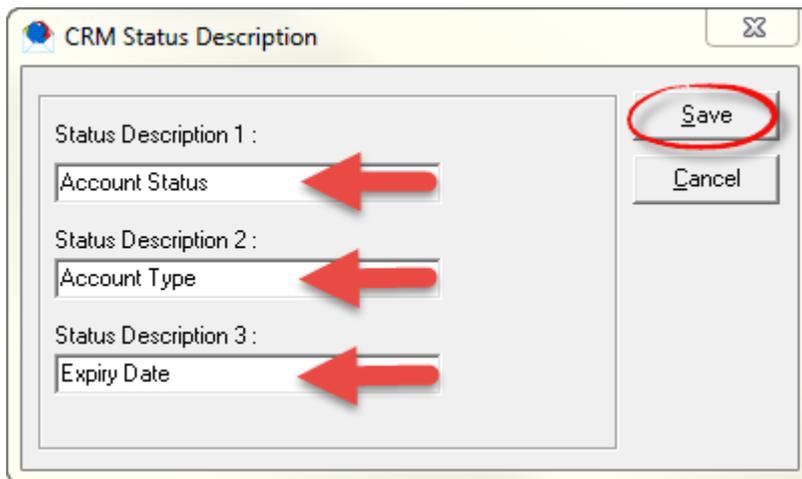
For the above to make more sense, we are now going to use the created statuses and add descriptions for each of them. This function will help you to keep track of changes on every account. Create the following "Statuses" as follow:

For "**Customer Statuses**", click on "**Setup**"; "**Status**", "**Account Status**" and "**Add**" the following:

- Buyer
- Long Term Tenant
- Short Term Tenant
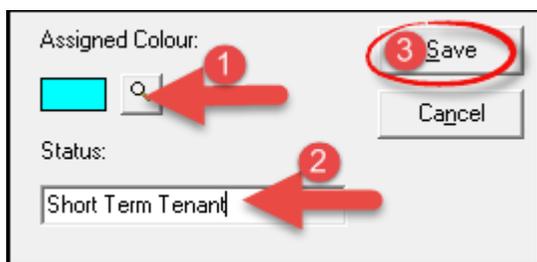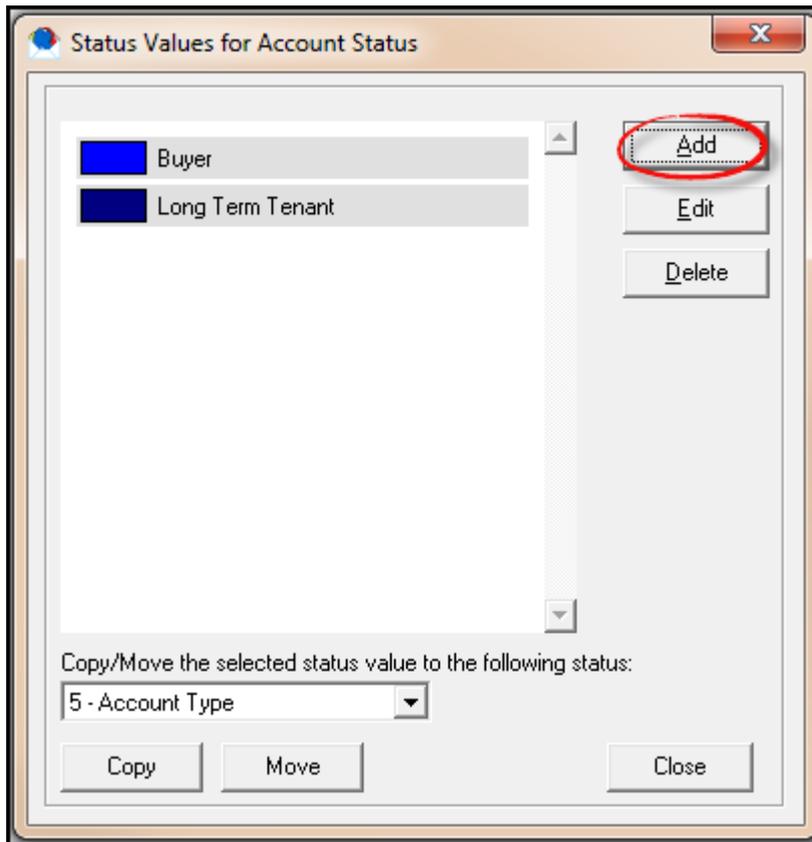
For "**Suppliers**": Click on "**Setup**"; "**Status**", "**Account Status**" and "**Add**" the following:

- Introduction (This status will be used when you introduced your company with an marketing mail)
- Newly Interested (The client is interested, but did not make a commitment)
- Pending (Awaiting a contract or signature)
- Active (The account is active and correspondence is ongoing)
- Cancelled (The client is not interested, or the contract was finalized)
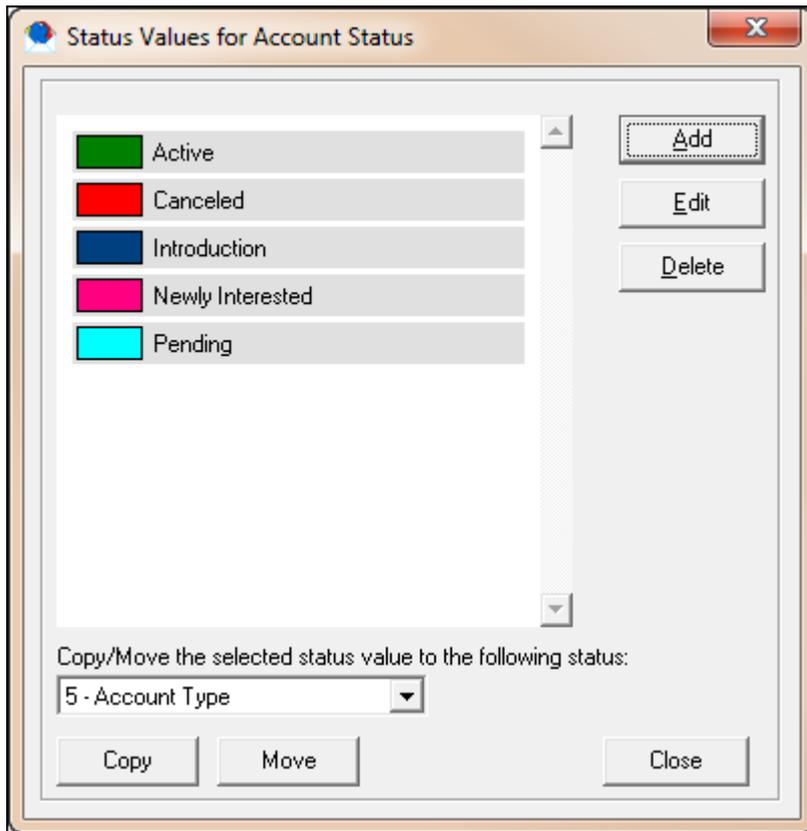
To setup the "**Account Type**" for "**Customers**", click on "**Setup**", "**Status**" and then "**Account Type**". Enter the following:

- Pending
- Active
- Termed

Now do the same for the "**Supplier Account Type**" by entering the following:

- Follow-up (Enter a "**Follow up**" for each month. This function is especially useful to keep track of when you need to correspond with a Supplier/Customer during a specific month. You will see later on in this presentation how to use the statuses, and how to search for results concerning the statuses

- Active - Private Long Term Rental

- Active - Private Holiday/Short Stay Rental

- Active - Private Sale

- Active - Agency Long Term Rental

- Active - Agency Holiday/Short Stay Rental

- Active - Agency Sale

- Terms and Conditions

- As with the above "**Active Statuses**", create "**Pending**" and "**Canceled**"
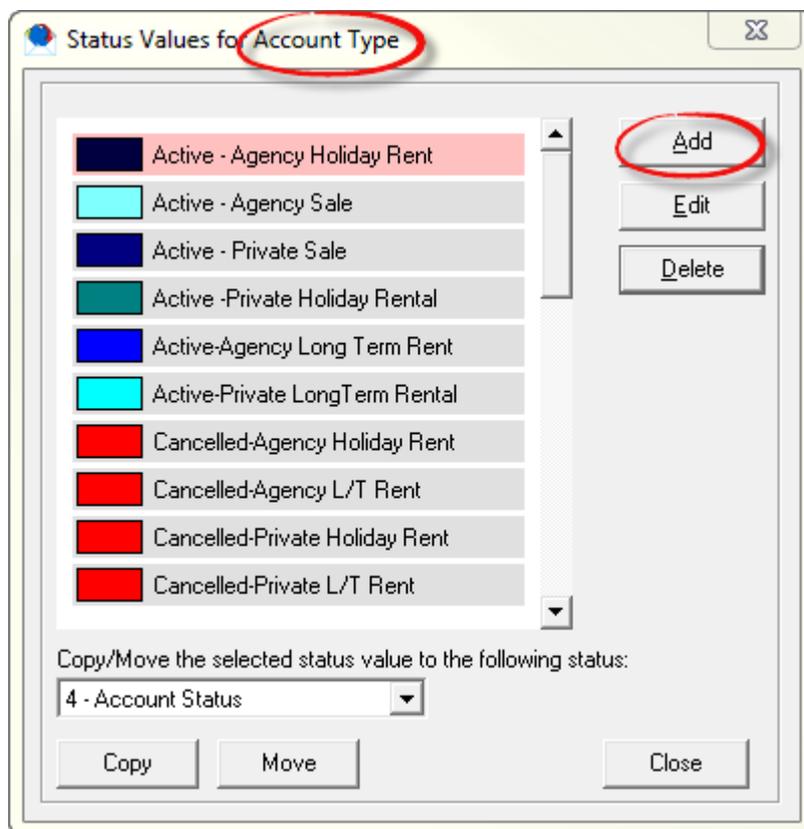
To setup "**Expiry Dates**" for both "Suppliers" and "Customers", click on "**Setup**", "**Status**" and then "**Expiry Date**"

- The 12 months of the year
- Unlimited
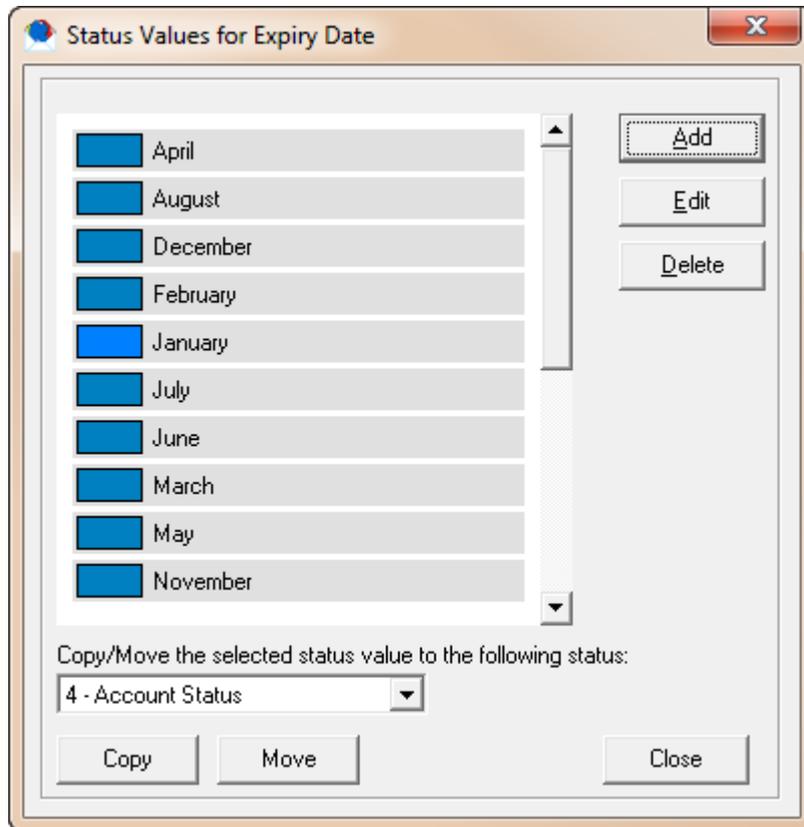
3.3 Setup Locations

The purpose of adding "**Locations**", is to effectively manage our "Suppliers" and "Customers". For example: When we need to inform all our "Customers" in a specific area that we are hosting an event, we use the search option for "**Locations**"

We will use the following example for creating "**Locations**":

Location 1	**Cape Town City**	**Northern Suburbs**	**Southern Suburbs**
Location 2	Woodstock	Bellville	Tokai
	Tamboerskloof	Brackenfell	Constantia
	Waterfront	Panorama	Rondebosch
	Foreshore	Table View	Newlands

- Click "**Edit**", and then "**Locations**" for either the "**Supplier**" or "**Customer**", depending on which one you are creating.
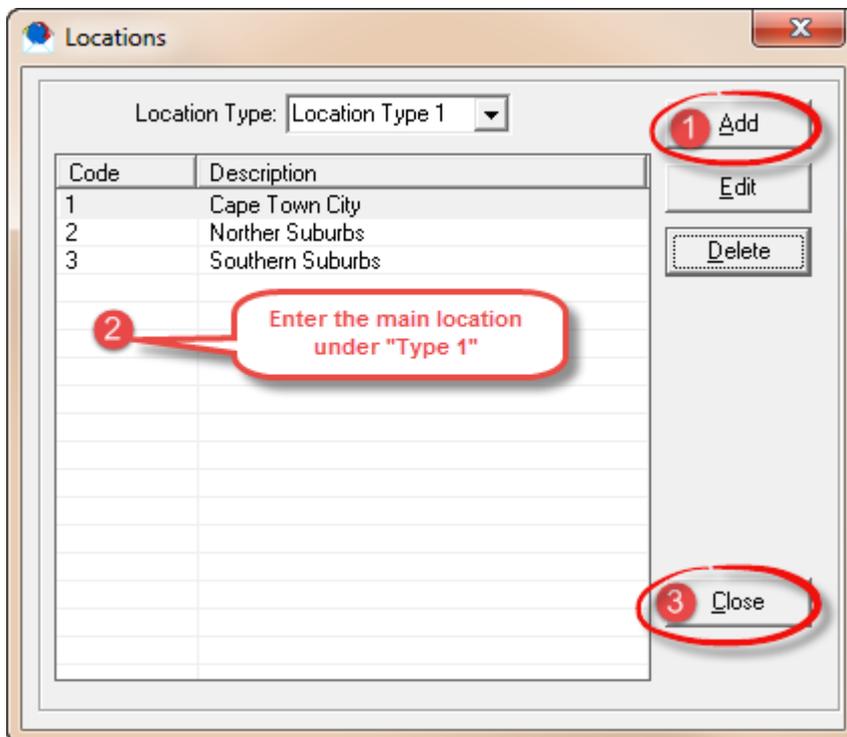
3.4   Setup SMTP Mail Server

In order to sent Emails from "Relations Management, the "SMTP" must be set up. On the top menu, click "**Setup**" and then "**Preferences**"
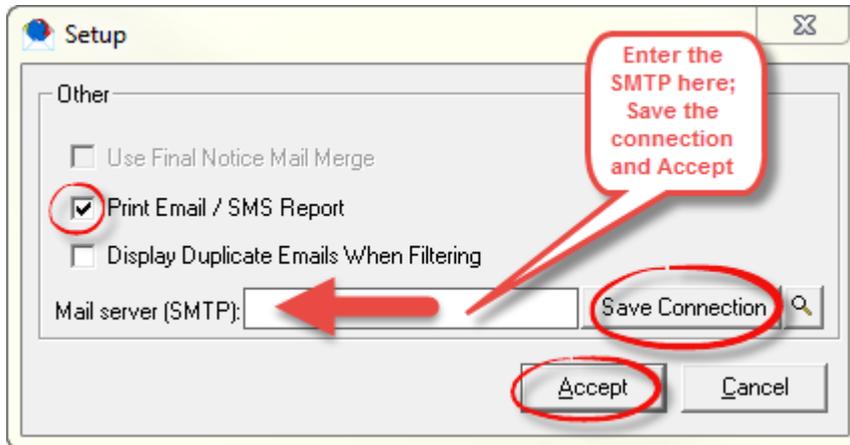
4   Step 2 - Adding and Maintaining Customers and Suppliers

Adding new Customers and Suppliers
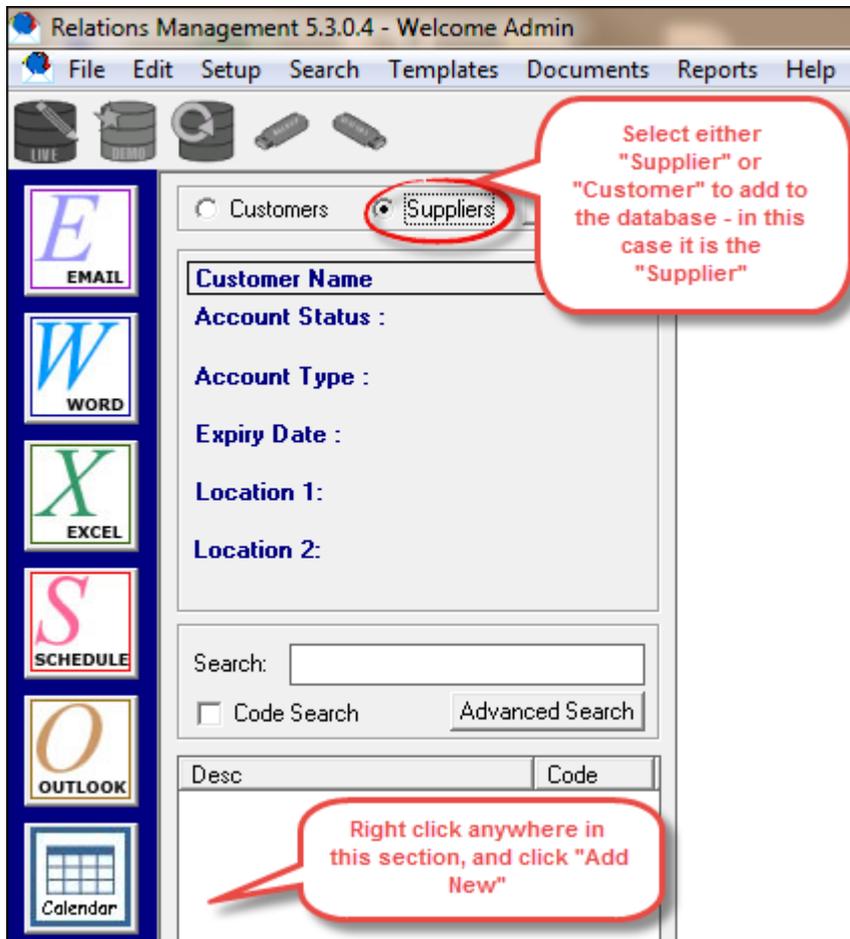
The best way to create an account in Novtel, is to use an alphanumeric code. For example: Mr Black is the first "**Supplier**" on our Novtel list, and the code for his account will be BLA001. Say for instance that another Mr Black was already created with that code, then the "**Account AutoNumber**" will automatically use the next available code - BLA002. You only need to enter the Alpha code (BLA), and Novtel will enter the Numeric code automatically when this function is selected

Should any "**Customer**" or "**Supplier**" have more than one contact person, click on the pin as shown below:

If changes are to be made, simply double click on the account, edit and "**Accept**" to save the changes. You can add and edit all the "**Suppliers**" and "**Customers**" by following the before mentioned guidelines

If at any time you would like to clear everything and start again, you can click the "**Start Over**" button. All data will be erased

4.1   Setting Statuses

Now we are going to use the "**Statuses**" we have set up in Step 1. The same method is used for "**Customers**" and "**Suppliers**". This image is from before any "**Statuses**" have been set:
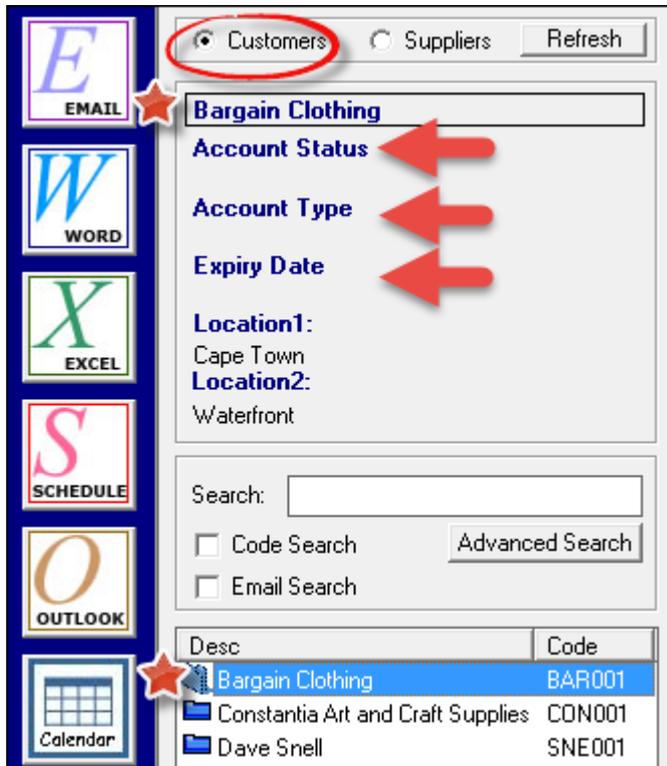
Right-click on the first "**Customer**" and click on "**Set Status**". Each "**Status**" will be unique to the specific account

This is what an account looks like when the "**Status**" has been set:

5   Step 3 - Search Capabilities

This is where the "**Statuses**" we have set up, are especially useful and there are different ways of searching for results. Let's look at the options:

➤ **Advanced Search**
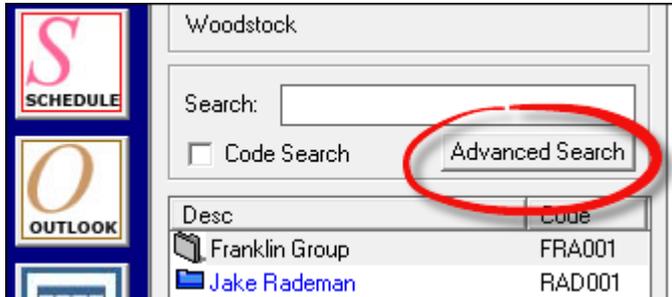
- There are options to search for specific "**Categories**", "**Locations**", "**Statuses**" and "**Expiry Dates**". In the following example, we are doing a search for all our "**Active**" "**Long Term Tenant**" accounts, which expire in December
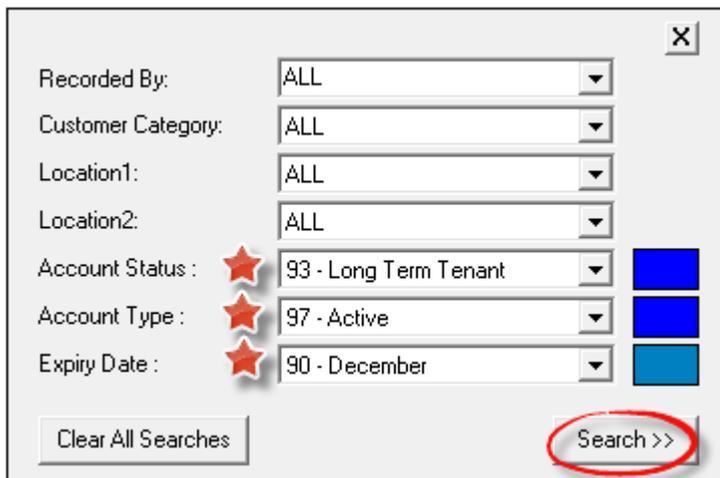
- Here you can see that every account that meets the search criteria are grouped together
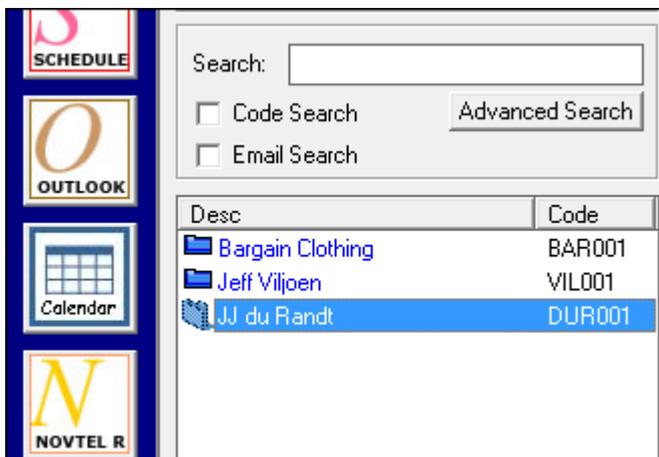
- After you have done the search and worked with the results, click "**Advanced Search**" once more, and "**Clear all Searches**"
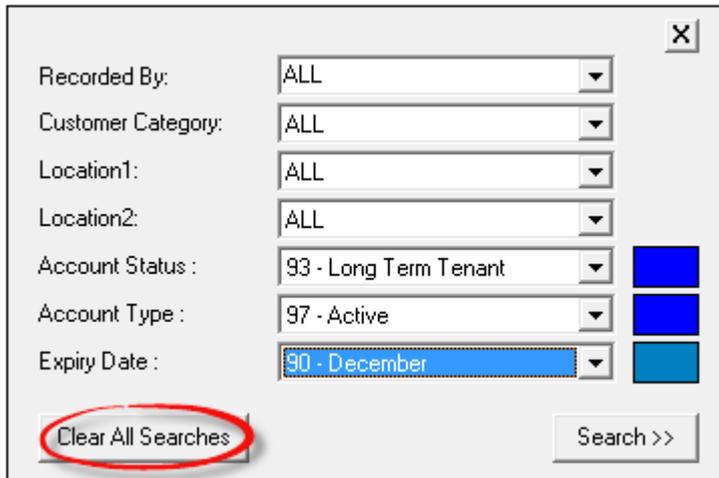
➢ **Single Account Search**

➢ **E-Mail Search**

- Tick the "**Email Search**" box
- Enter the Email address, or part thereof, in the "**Search**" box, and the account to which the Email address is linked, will appear at the top and the account will be highlighted in the "**Description**" and "**Code**" Box
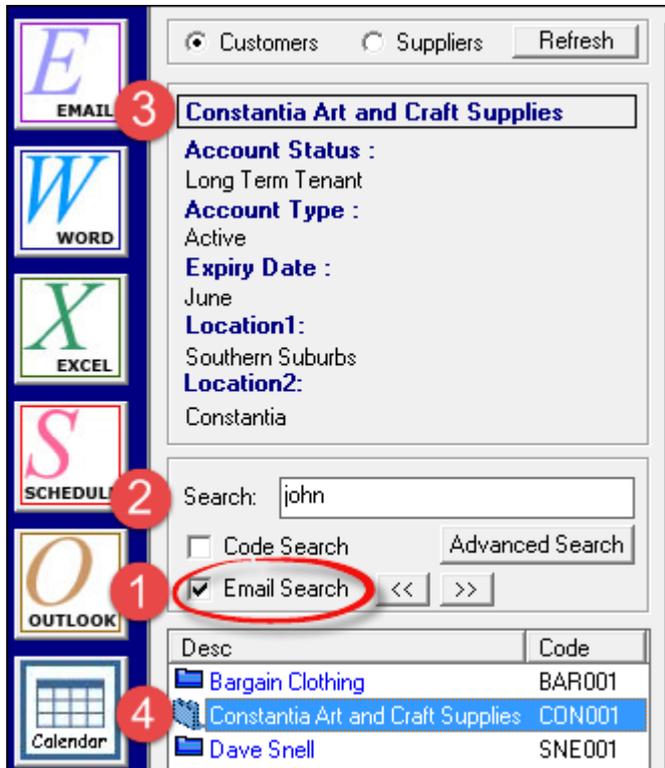
- This is another option to search for an account with an Email address (or any other criteria specified in the top menu, "**Search**")
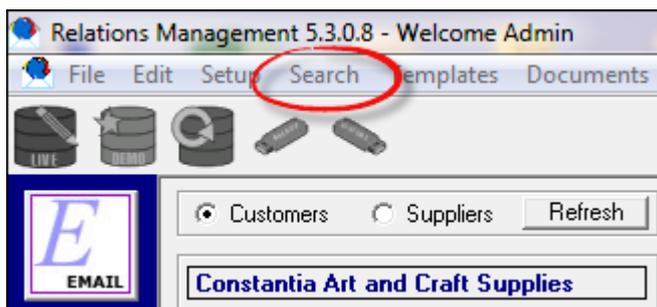
- Click "**By Email**"
- Tick the "**Email Address**" box, and enter the Email
- Click "**Search**"

- This will be the result

6   Step 4 - Email and SMS Templates

- On the top menu, click on "**Templates**", "**Setup Email/SMS Templates**", and then "**Add**"
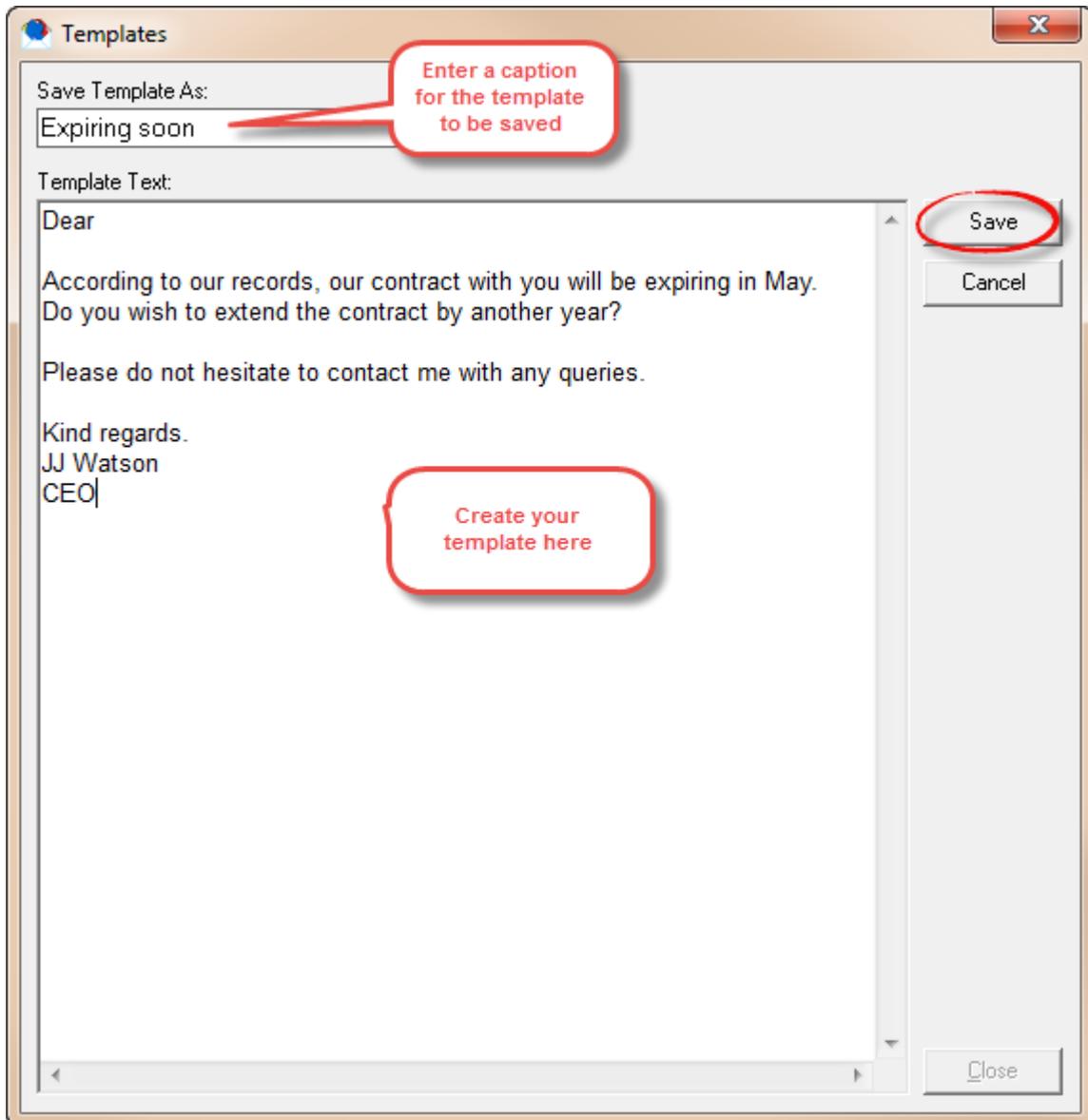
- You can create as many "Templates" as you need. To edit it, just click on the particular "Template", then "**Edit**" and "**Save**"

Let's use the search we've done in "**Step 3**", and send an email to those clients using the "Template" we have just created. Remember that the search was done for all "**Active**" "**Long Term Tenants**" whose leases will expire in December? In the same manner you can keep track of, and email other clients with the exact same template for various times of the year when their contracts are about to expire
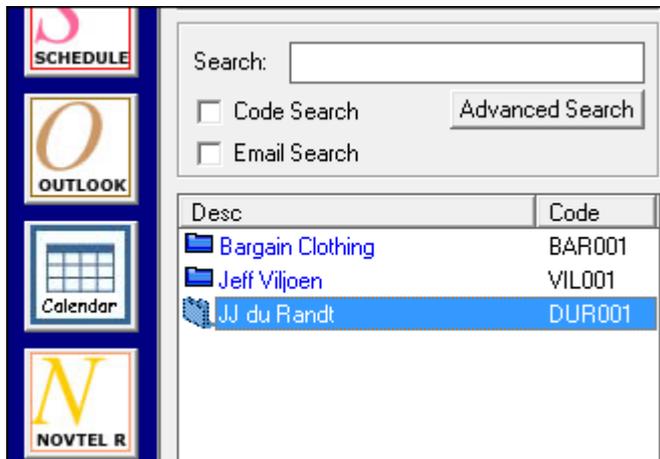
- Right click on any of the names in the search area and click "**Mail All**". Click "**Yes**" when prompted with: "**Are you sure you want to mail ALL Customers**?"
- Click on "**Use Template**"and "**Select**" the "**Template**" to be sent. If you want to add anything at this stage, and you do not want to edit the original "**Template**", just type your message on the mail below
- "**Send**"
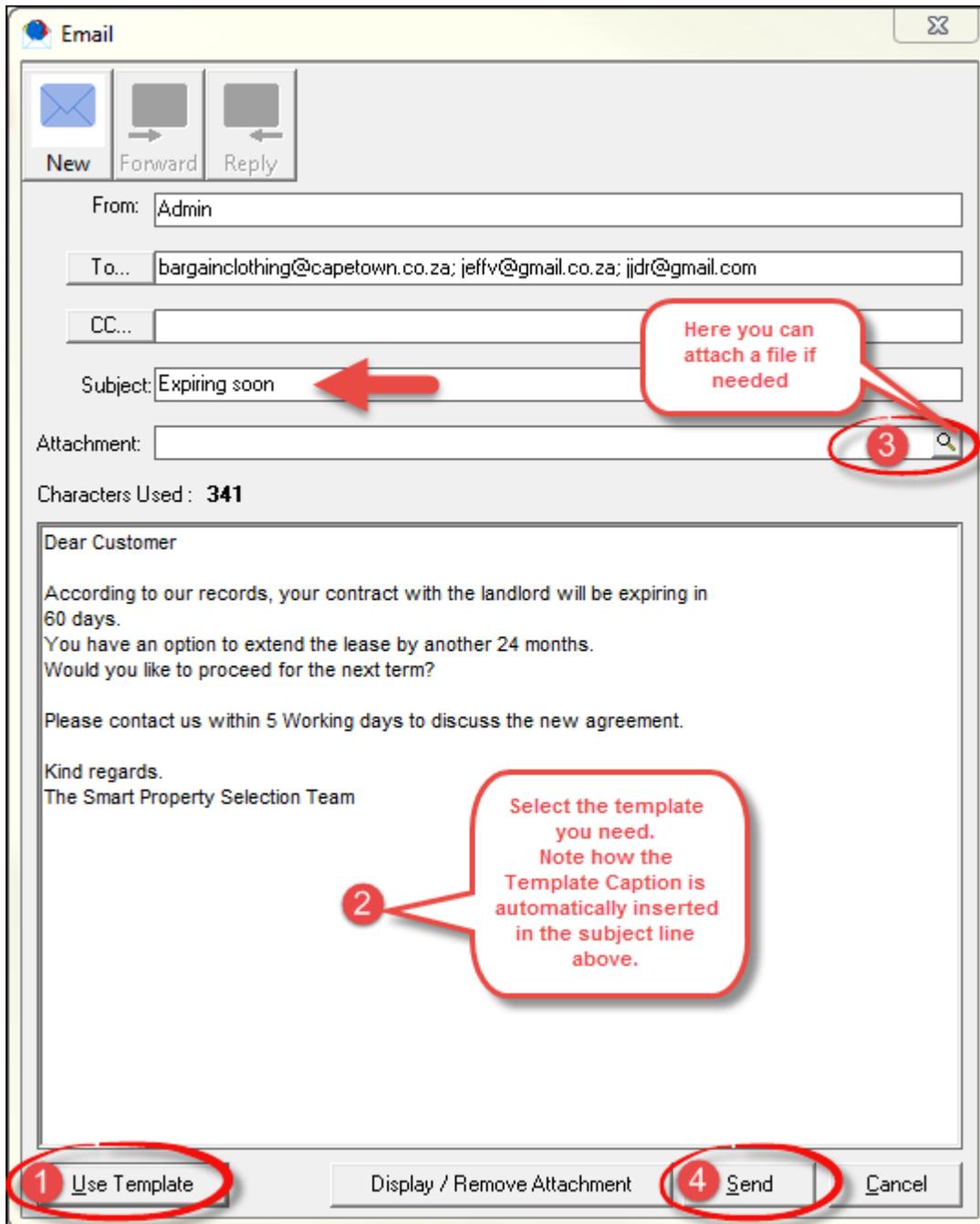
- The exact method will be used to setup SMS's, and to send it to "Customers" or "Suppliers"

7 Step 5 - Email Inbox and Communication Management

➢ **Email Inbox Management**

- When an email is sent as in Step 4, the correspondence is recorded on that account and cannot be deleted
- All user activity will automatically be logged on the screen connected to the work that was done on the account

- Each time a mail was sent, you will receive a report

List of Outgoing Email / SMS

Date and time report was printed 19/05/2014 12:04:45 PM

Code	Description	Email	Cell	Cust / Supp
DUR001	JJ du Randt	jjdr@gmail.com		Customer

When you are using an email program like Outlook, and the client has replied on your email, the email can be imported into "**Relations Management**" directly onto the client's account. This way you can keep track of everything done on the account with a click of a button. To import emails from Outlook:

- Click on the Email icon at the top left
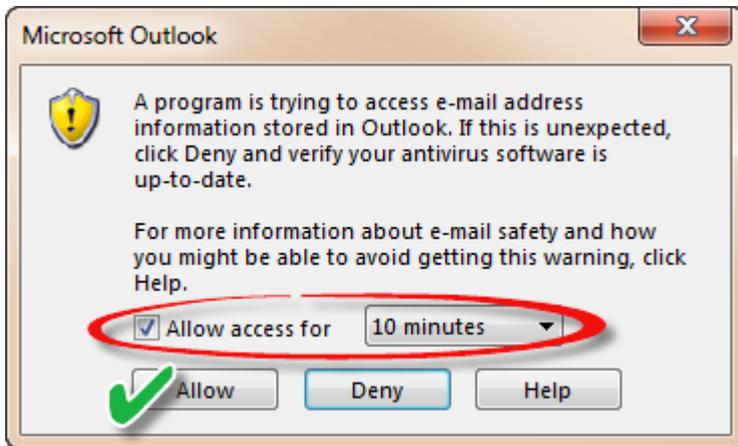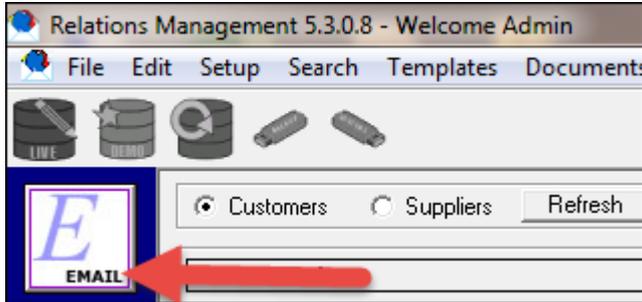
- Click on the applicable mail and then "**Save**"
- Select the account to which the mail should be saved
- "**Accept**"
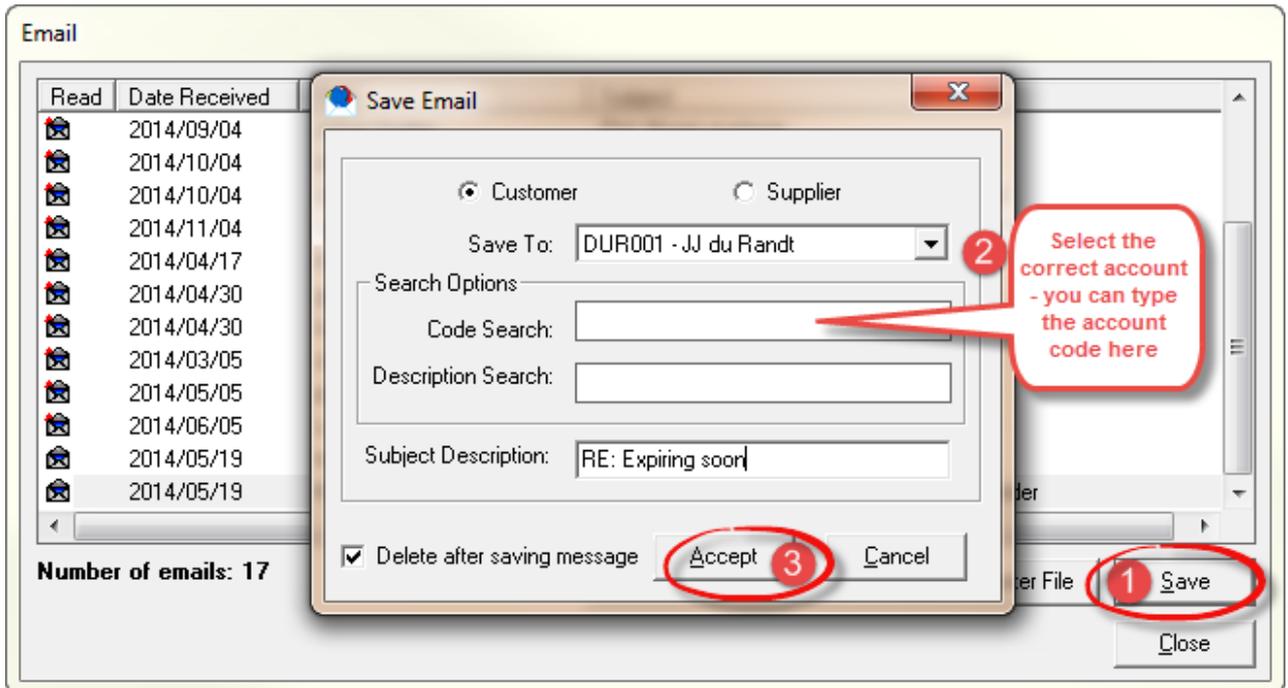
Should you, by accident, save the email on the wrong account, simply right click on the mail in "**Relations Management**" and select "**Move**". Choose the account to which it should be moved, and "**Accept**"

➤Other Communication Management

Say for instance that you have phoned Mr Du Randt, and you want to log the details of the phone call on his account, you can right click on his account and click "**Log Phone Entry**"

- As soon as the entry is saved, it will also reflect on the "Customer's" account
- View an entry by double clicking on it to open the communication

- In the same manner you can "**Save a Note**" with details if you have visited a "Customer"; "**Log a Fax**", etc
- The lease contract or any other documents can be saved on the account by right clicking on the "Customer" and selecting "**Save Documents**". The Documents on your computer will open. Select the file, "**Open**" it, and it will be saved on the account
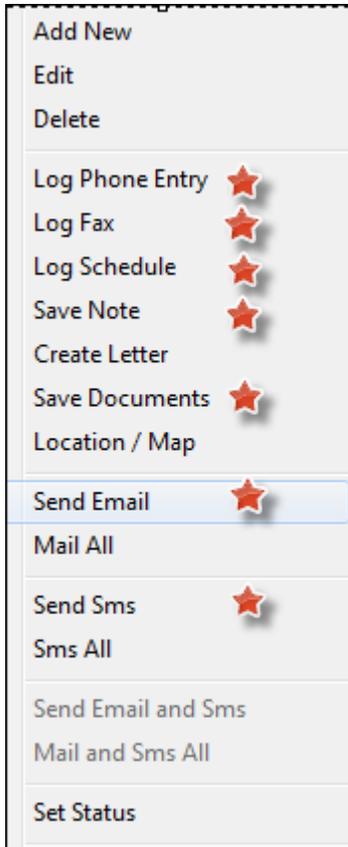
8   Step 6 - Understanding Scheduler

In order to manage the accounts effectively, a reminder system has been put into place

Firstly: an email will be sent immediately when the task is created, to the person in the company involved with the specific task

Secondly: A reminder will pop up on the day of the task, as soon as "**Relations Management**" is opened

- Right Click on the account and choose "**Log Schedule**"
- Enter the name of the "**Contact Person**"
- Enter the "**Instruction**" in as much detail as possible
- Tick the box for "**Uncompleted and Remind User**" and enter the date and time for the reminder
- Click "**Save**"
- Select the staff member to assign the task to

9   Step 7 - Reports

- On the top menu, Click "**Reports**"
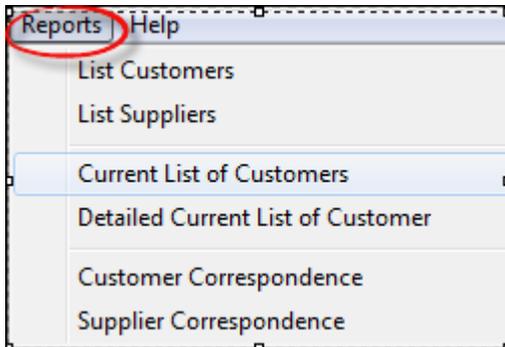
- Click "**Detailed Current list of Customers**". This list enables you to see all your "**Customer**" details in one quick view

Code	Description	Account Status	Account Type	Expiry Date	Telephone	Mobile	Email
AND001	Shawn Andrews	Long Term Tenant	Active	Unlimited		089 369 2581	shawna@gmail.com
BAR001	Bargain Clothing	Long Term Tenant	Active	December		088 0123 456	bargainclothing@capetown.c
CON001	Constantia Art and Craft Sup	Long Term Tenant	Active	June		077 2589 357	johnwilson@art.co.za
DUR001	JJ du Randt	Long Term Tenant	Active	December		097 999 8887	jjdr@gmail.com
DUV001	Duvet and Pillow Manufactu	Long Term Tenant	Active	June		099 1234 567	willem@dpm.co.za
FOU001	David Fourie	Short Term Tenant	Pending			088 664 77 55	davidf@gmail.co.za
GRO001	Jan Groenewald	Short Term Tenant	Active			077 8521 369	jangroen@xsinet.com
LOU001	Jane Louw	Short Term Tenant	Pending			077 1951 591	janelouw@hotmail.com
SNE001	Dave Snell	Long Term Tenant	Active	November		099 111 22 33	ds@hotmail.com
TAY001	Taylor Engineering	Long Term Tenant	Active	April		099 3692 558	stuart@tayloreng.co.za
UNI001	Uniforms Manufacturers CC	Long Term Tenant	Active	July		088 555 5555	uniforms@manufacturers.co.
VIL001	Jeff Viljoen	Long Term Tenant	Active	December		088 664 4466	jeffv@gmail.co.za

- To view correspondence between your company and the "Customers", click "**Reports**" and then "**Customer Correspondence**"
- Select the "Customers" you want to view, by clicking "**From**" and "**To**"
- Select the dates to be viewed
- If you want to search for a specific user's correspondence with the "Customers", select the user. Otherwise it will search by default for all users' activity
- Click "**Accept**"

- All reports are in HTML Format

List of Customer Correspondence
Statement from 2014/05/01 to 2014/05/19
Date and time report was printed 19/05/2014 03:48:09 PM

Date	Time	Type	Subject	Employee
DUR001 - JJ du Randt				
2014/05/19	12:04:45 PM	Email	Expiring soon	Admin
2014/05/19	12:55:57 PM	Email	RE: Expiring soon	Admin
2014/05/19	02:30:56 PM	Phone	Phone call - Spoke to JJ	Admin
VIL001 - Jeff Viljoen				
2014/05/19	12:56:25 PM	Email	RE: Expiring soon	Admin

![Novtel logo]

OUR PRODUCTS

Our Pastel integrating software include products for:

- Property Management
- Vehicle Hire*
- Self-Storage
- Equipment Hire*
- Relations Management*
- Hospitality*
- Contract Management
- Toilet Hire*
- Service Business Rental
- Point of Sale: Retail*
- Point of Sale: Restaurant*
- Workshop Management*
- Gate / Facility Access Control*
- Standard Operating Procedure (SOP) Management*

* Can also be used as stand-alone applications

OUR WEB PORTALS

GLOBAL PROPERTY ONLINE
A NOVTEL COMPANY

Novtel Powered By

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:

- Global Property Online – www.globalpropertyonline.net
- Buy Property in Spain – www.buypropertyinspain.net
- Property in Portugal for sale – www.propertyinportugalforsale.com
- Australia Property – www.australia-property.net
- BLOG – www.blog.globalpropertyonline.net