



7 STEPS TO
Mastering the Basics

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A blue rounded rectangle with a grid pattern on the left side. The text "RELATIONS MANAGEMENT" is written in white, uppercase, sans-serif font across the center.

RELATIONS
MANAGEMENT

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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)

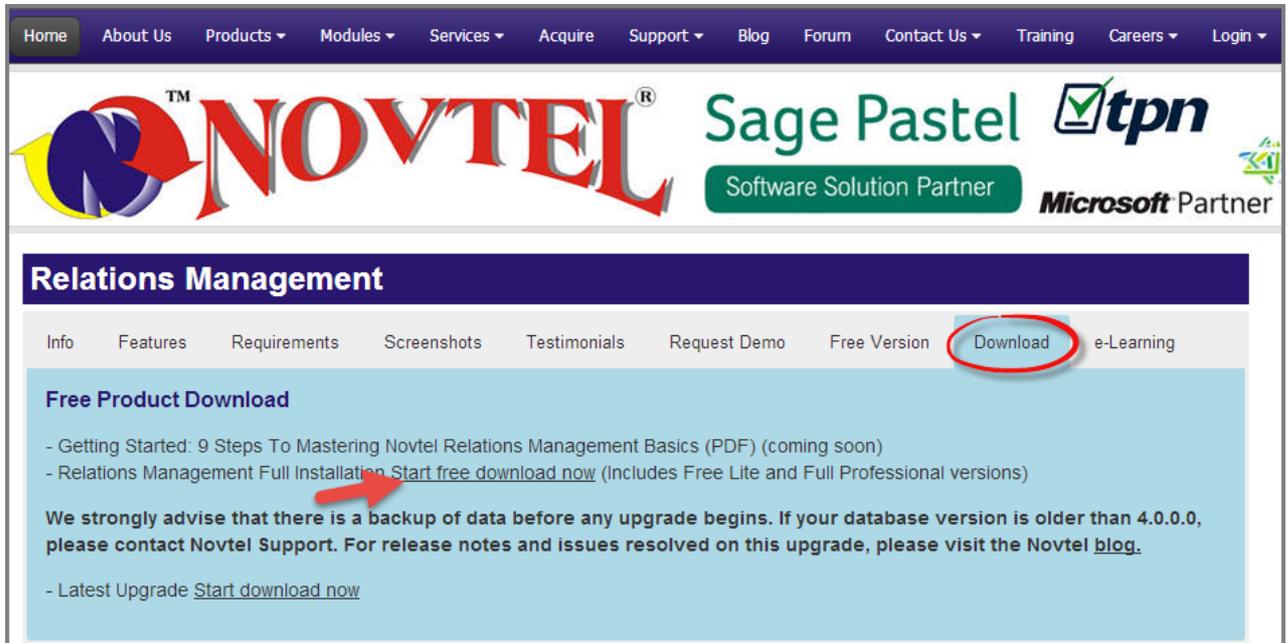
Customer and Supplier Management

- 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.

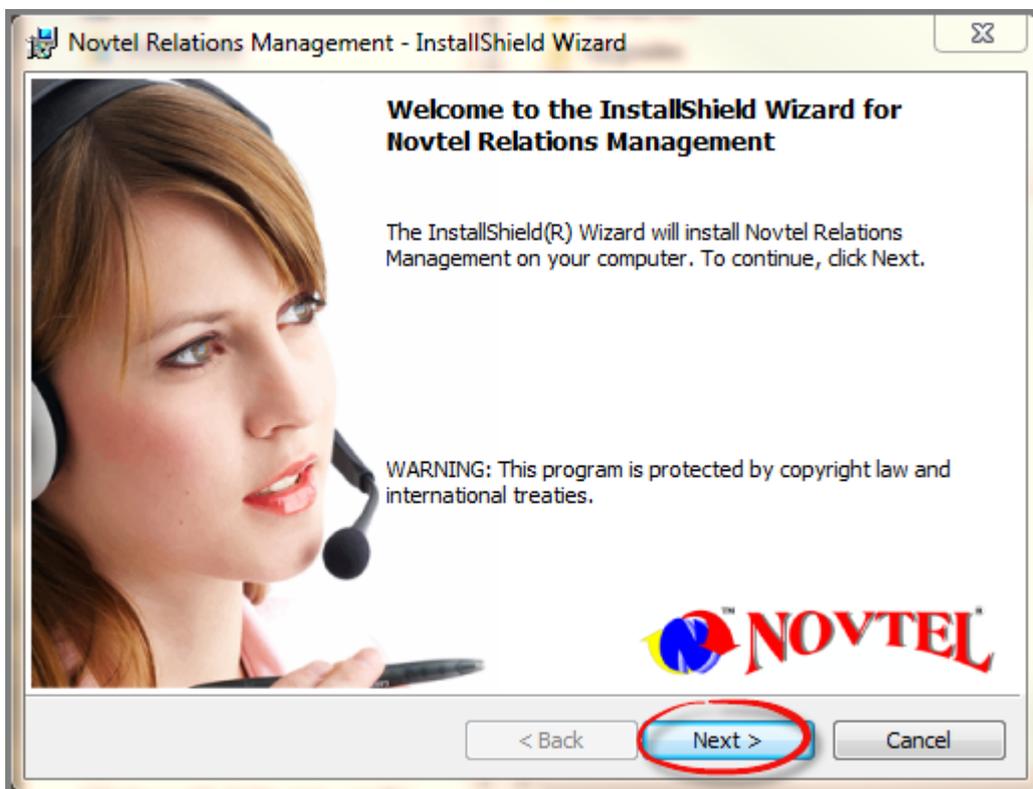
2 Getting Started

Downloading and installing

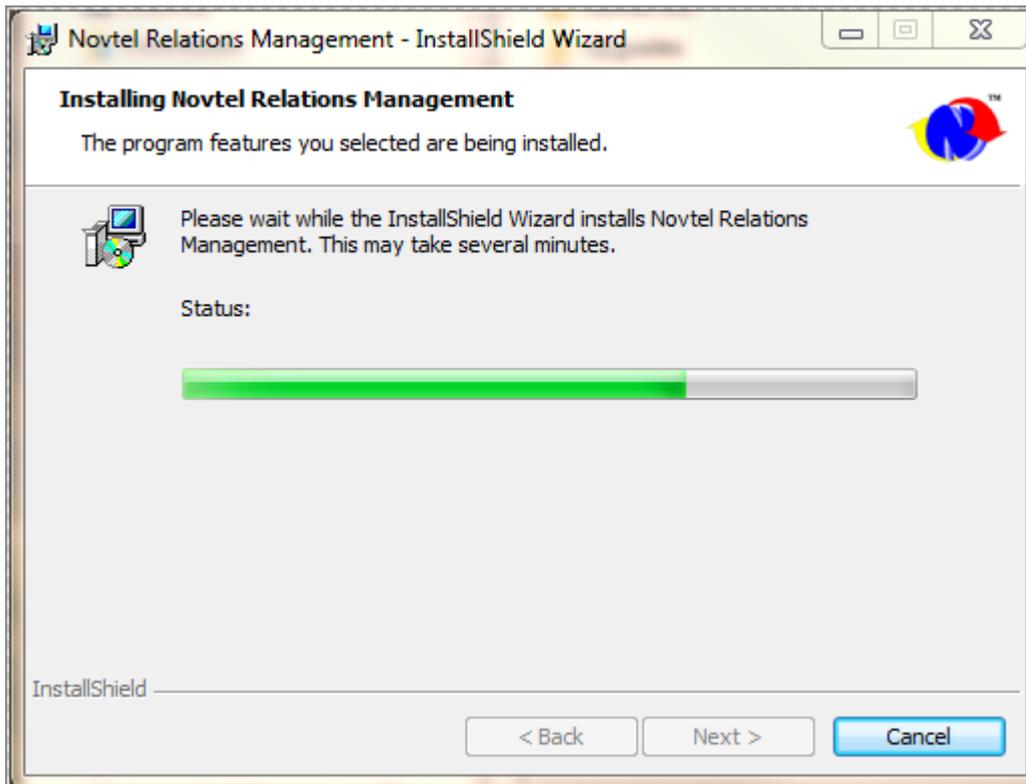


The screenshot shows the Novtel Relations Management website. The navigation menu includes Home, About Us, Products, Modules, Services, Acquire, Support, Blog, Forum, Contact Us, Training, Careers, and Login. The main header features the Novtel logo, Sage Pastel logo, and tpn logo. Below the header, there is a section for "Relations Management" with a sub-menu: Info, Features, Requirements, Screenshots, Testimonials, Request Demo, Free Version, Download (circled in red), and e-Learning. The "Free Product Download" section lists several options, with a red arrow pointing to the "Relations Management Full Installation Start free download now" link. A warning message states: "We strongly advise that there is a backup of data before any upgrade begins. If your database version is older than 4.0.0.0, please contact Novtel Support. For release notes and issues resolved on this upgrade, please visit the Novtel blog." The "Latest Upgrade Start download now" link is also visible.

Click on "Run", then "Next" and "Accept the Terms of the License Agreement"



The screenshot shows the "Novtel Relations Management - InstallShield Wizard" window. The window title is "Novtel Relations Management - InstallShield Wizard". The main text reads: "Welcome to the InstallShield Wizard for Novtel Relations Management". Below this, it says: "The InstallShield(R) Wizard will install Novtel Relations Management on your computer. To continue, click Next." A warning message states: "WARNING: This program is protected by copyright law and international treaties." The Novtel logo is displayed at the bottom right. At the bottom of the window, there are three buttons: "< Back", "Next >" (circled in red), and "Cancel".



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

Novtel Relations Management Lite

Please complete the following form to register your product:

<input type="text" value="First Name"/> ★	Limits No Limits Unlimited
<input type="text" value="Surname"/> ★	
<input type="text" value="Company"/> ★	
<input type="text" value="Email"/> ★	
<input type="text" value="Cellphone"/> ★	

A SMS activation will be sent to this number, awarding you with 3 FREE support credits!

Rate Our Product				
				
<input type="radio"/>				

Help us keep the Lite Version free by making a donation:

Registrations Skipped: 0 (maximum 10)

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 activation code, enter it into the area below and click Activate.

Activation Code: 

Registrations/Activations skipped: 0 (maximum 10)

[Activate Later](#) [Activate](#) 

1 Enter the code you have received via sms in order to qualify for the 3 free support credits

Registration Successful!

In order to qualify for your 3 free support credits, a code has been SMSed to:

Enter this code below to receive your free support credits.

44575 **2** Activate Resend

Registration details:

First Name	Louise
Surname	Jvv
Cellphone	
Company	Novtel
Email	louise.jvv@novtel.com
Renew within	30 days

3 Continue

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 Crescent
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 Crescent
Unit 4
Industrial Park
Rondebosch
8555

Tenant: Mr Stuart Taylor

Taylor Engineering
099 3692 558
stuart@taylorengr.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**

Werner Espin
099 444 55 11
werner.e@telkomsa.net
The Blue Dolphin Holiday Flats
Nr 7
Bluebell Street
Newlands

Owner 9

Stan Carr
088 999 4455
scarr@telkomsa.net
Carr Place
Shop 7
Queen Road
Bellville
8877

Owner 8

Lang and Partners
099 333 44 55
robertlang@partners.com
Mr Robert Lang
Warehouse 4
Harry Circle
Woodstock

Owner 10

Mr Steve Button
088 999 7777
steveb@gmail.com
11 Sampson Street
Newlands
5566

3 Step 1 - Setup

Company Setup

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

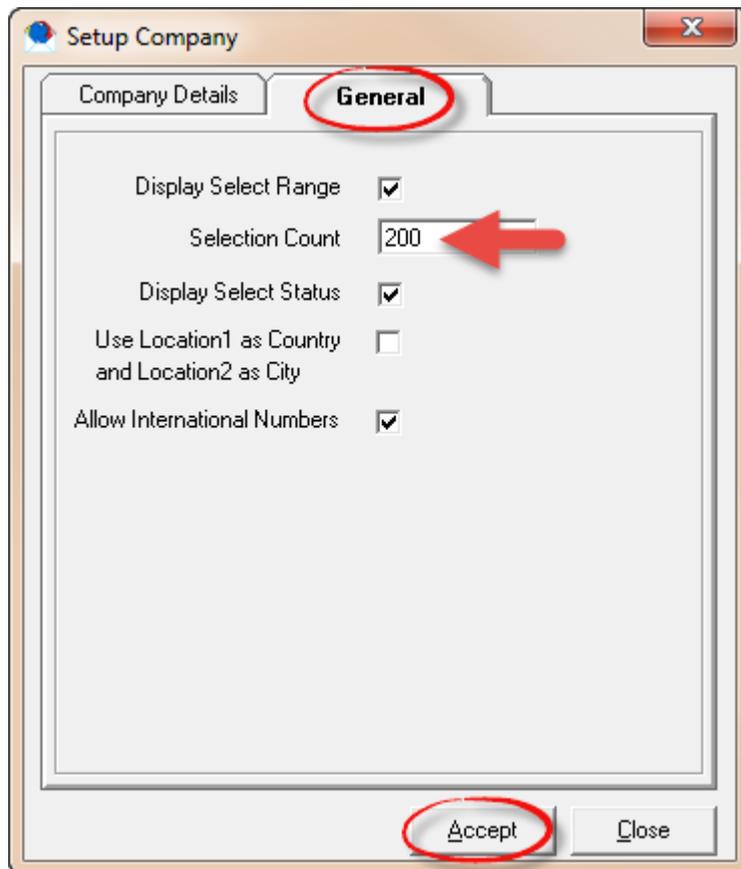


The screenshot shows a dialog box titled "Setup Company" with a close button (X) in the top right corner. The dialog has two tabs: "Company Details" (which is selected and circled in red) and "General". The "Company Details" tab contains several input fields, each with a red star icon to its right:

- Name: Smart Property Selection
- Tel: +27212223334
- Fax: +27212223334
- Cell: +27882223334
- Email: capetown@sps.co.za
- Address: Shop 4, Business Centre, 17 Mountain Rd, Bellville, 8000
- Computer Location: Sales

At the bottom of the dialog, there are two buttons: "Accept" (circled in red) and "Close".

- 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

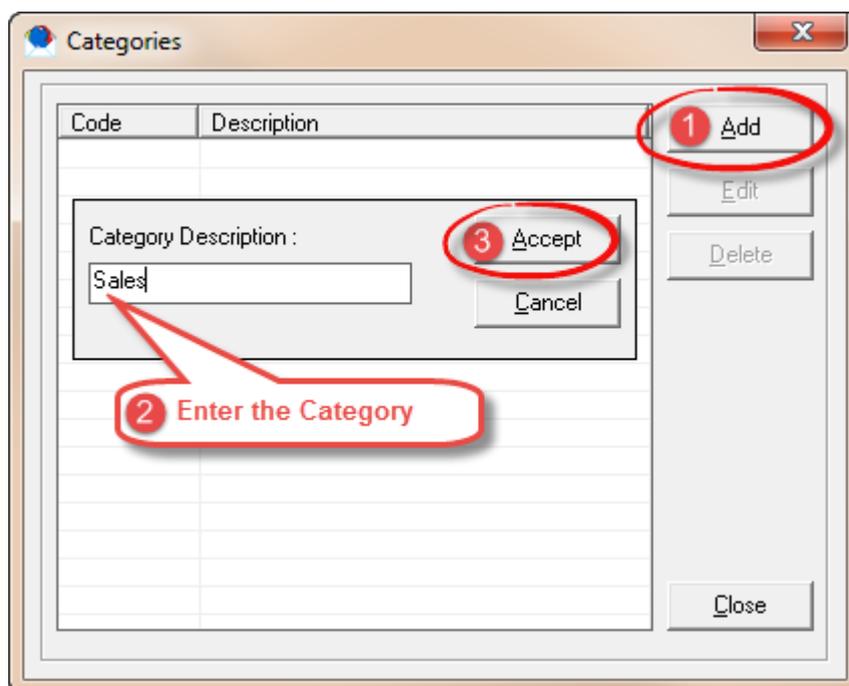
Each business will use its own unique "**Categories**" and "**Statuses**" to work with. For instance: "**Categories**" and "**Statuses**" in a Property Business will be totally different from those in the Vehicle Hire Industry. Here you can plan how you want to set it up in order to fit your business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

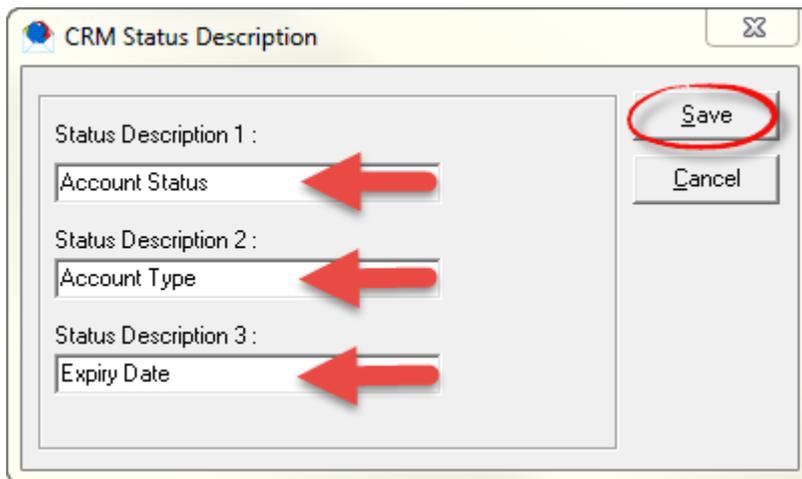
- Residential Rental
- Bed and Breakfast
- Hotel
- Holiday Flat
- Long Term Industrial Rental
- Long Term Commercial Rental

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

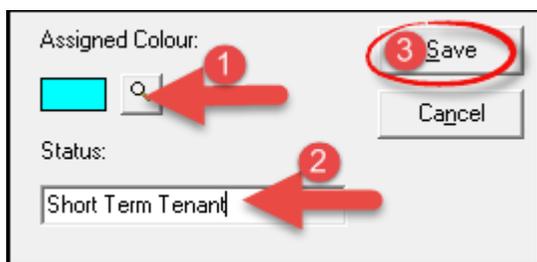
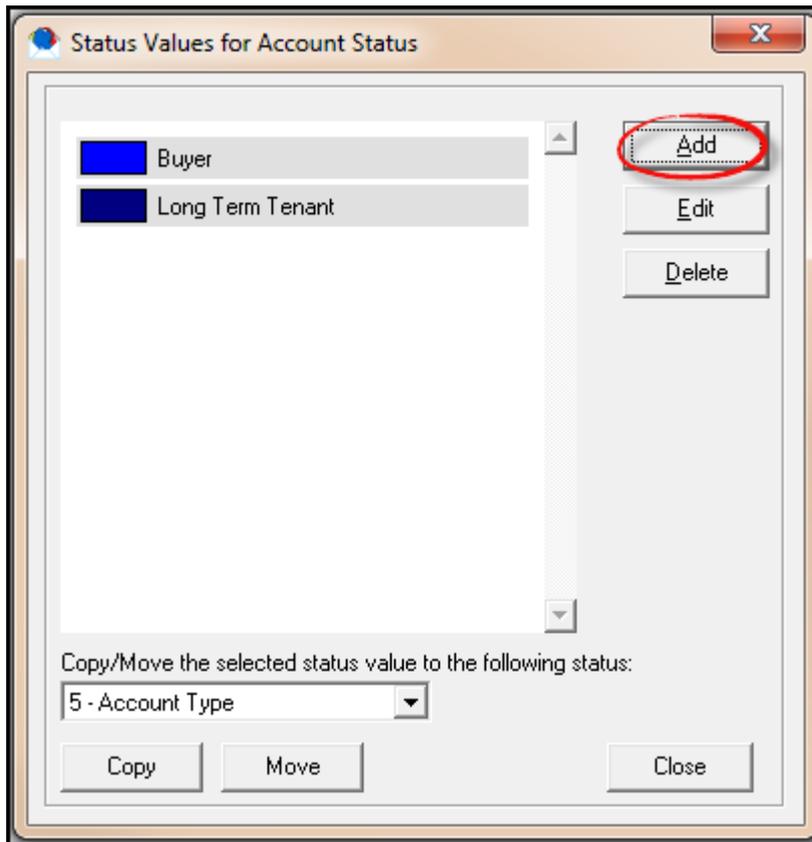
Click on "**Setup**", "**Status**", "**Status Description**" and then "**Add**"



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:

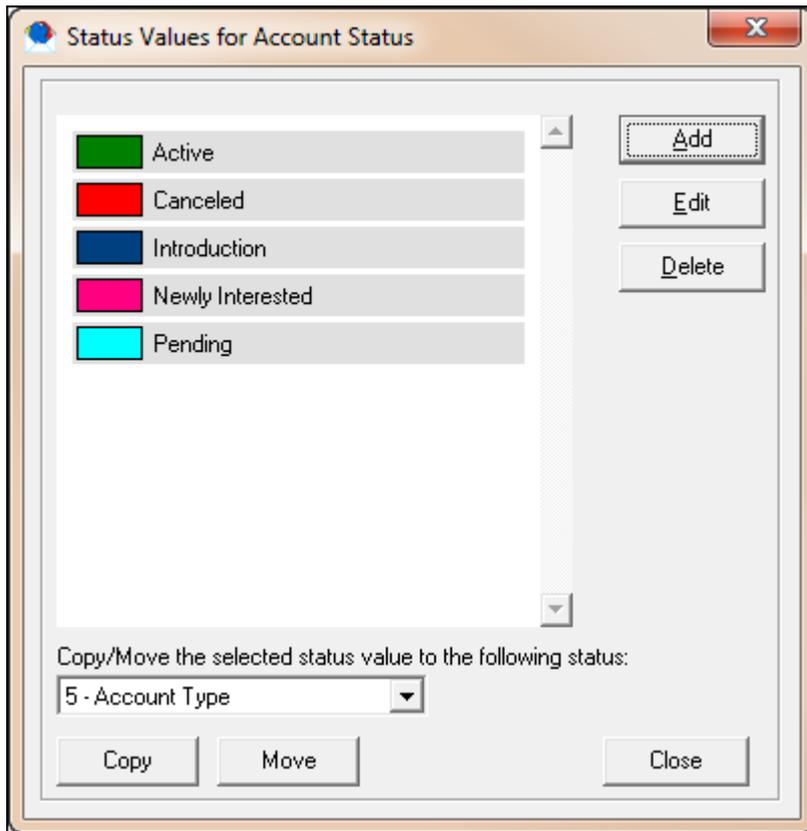
For "**Customer Statuses**", click on "**Setup**"; "**Status**", "**Account Status**" and "**Add**" the following:

- 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)

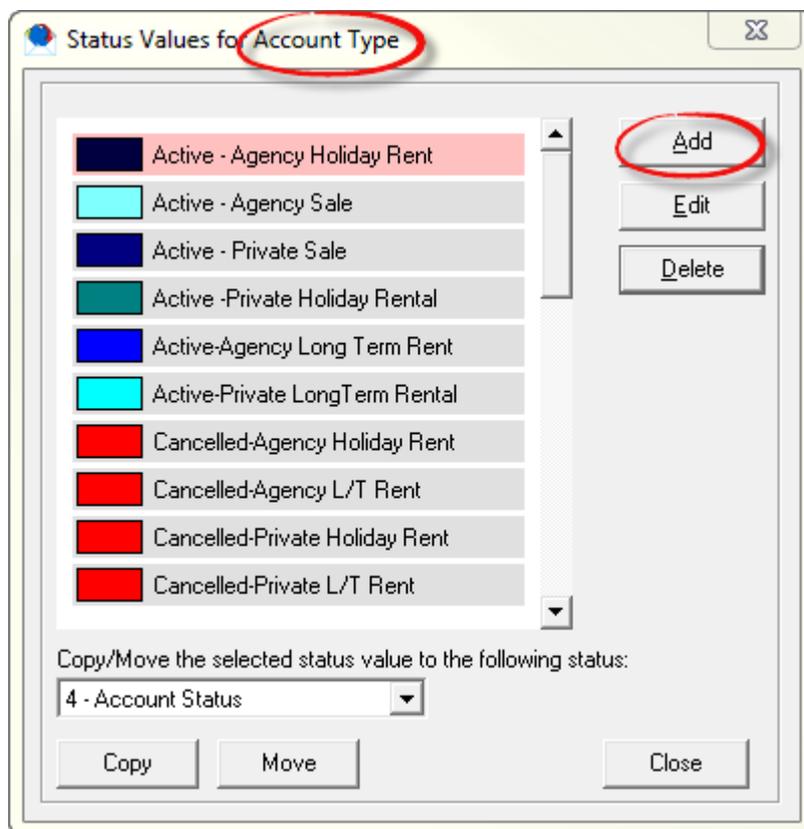


To setup the "Account Type" for "Customers", click on "Setup", "Status" and then "Account Type". Enter the following:

- Pending
- Active
- Termed

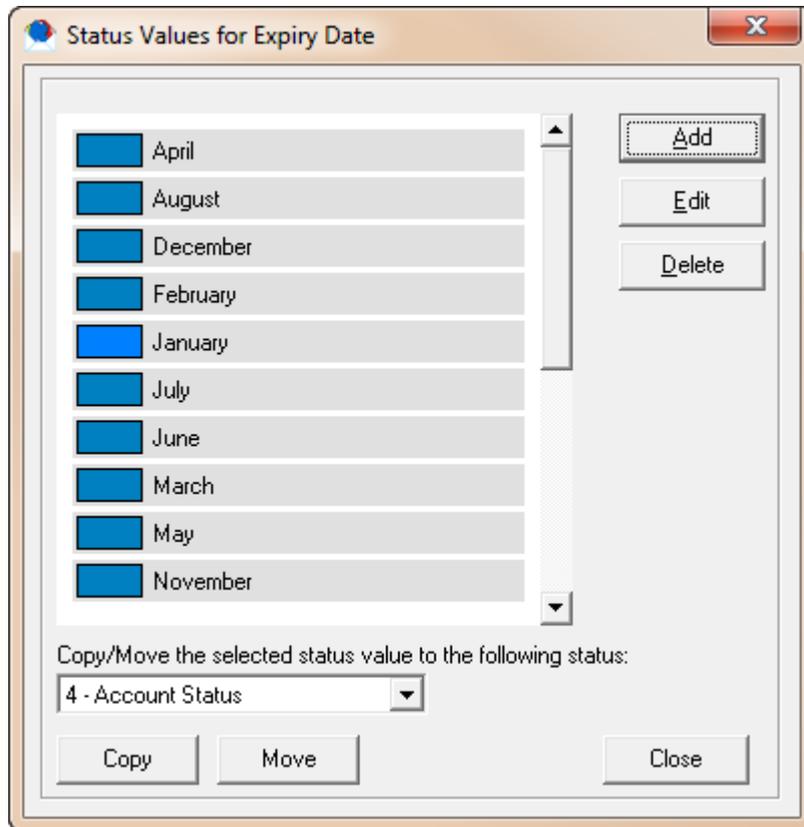
Now do the same for the "**Supplier Account Type**" by entering the following:

- 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



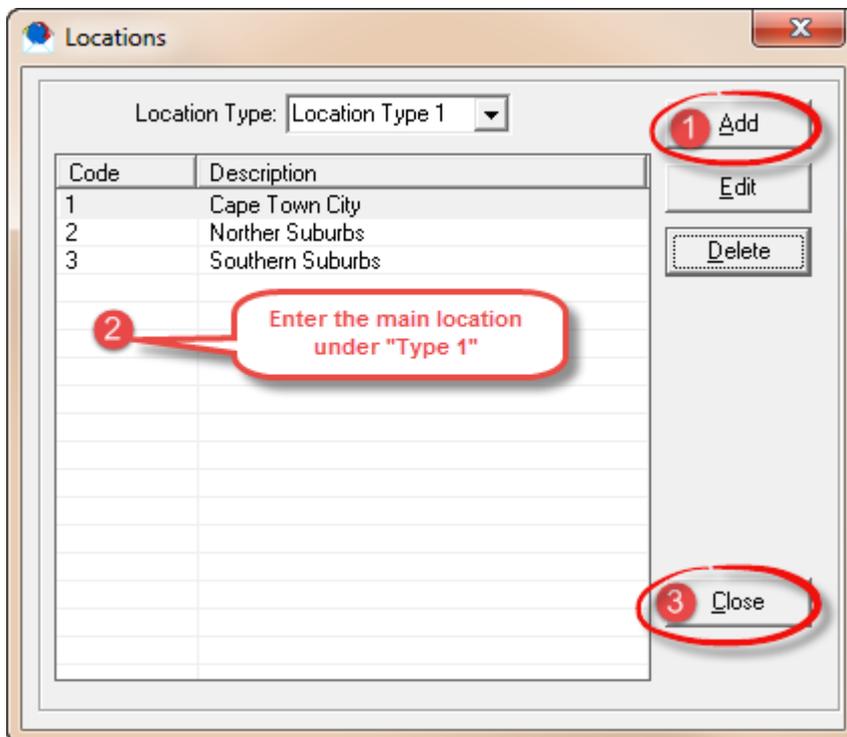
3.3 Setup Locations

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**":

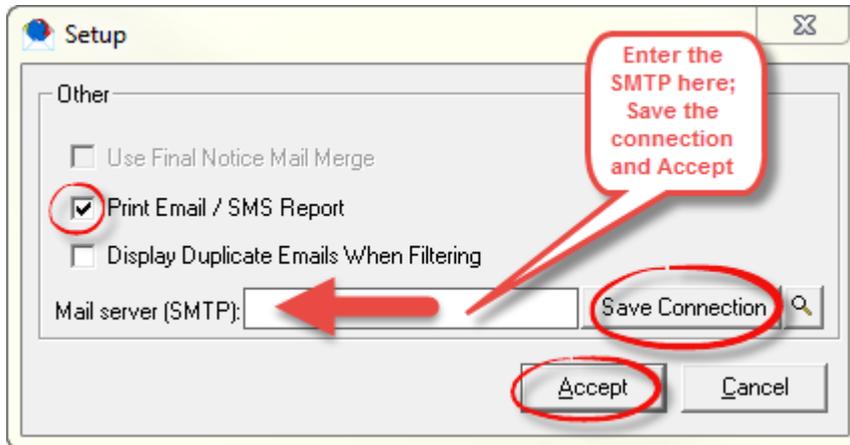
Location 1	Cape Town City	Northern Suburbs	Southern Suburbs
Location 2	Woodstock	Bellville	Tokai
	Tamboerskloof	Brackenfell	Constantia
	Waterfront	Panorama	Rondebosch
	Foreshore	Table View	Newlands

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



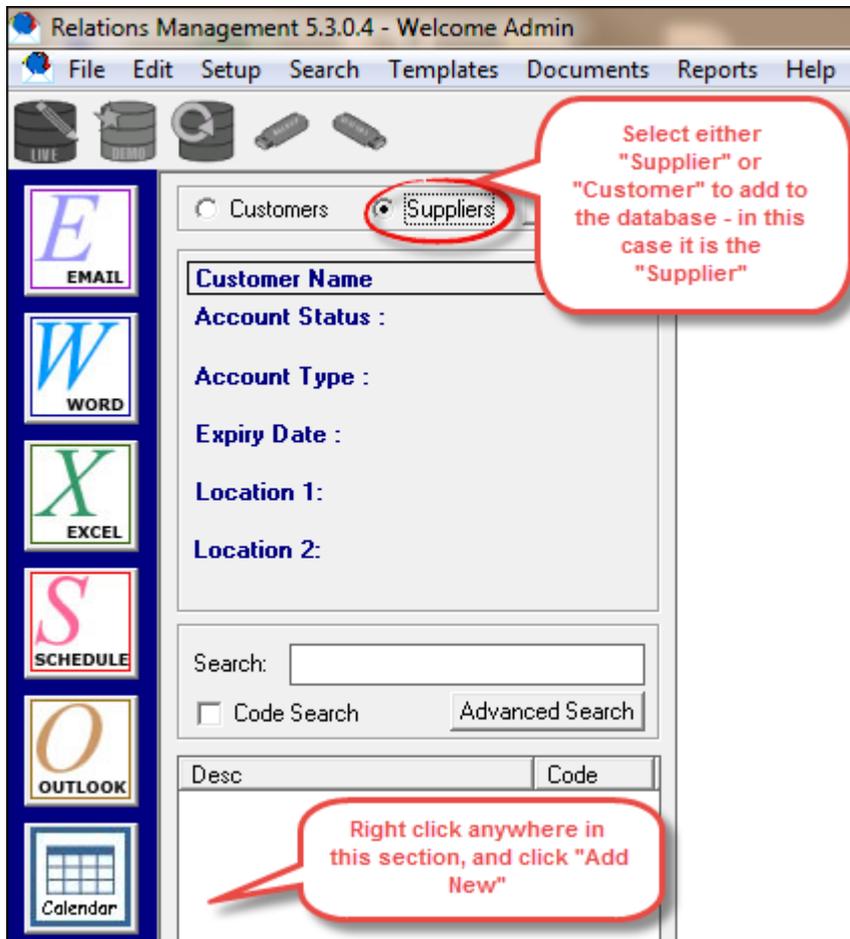
3.4 Setup SMTP Mail Server

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

Edit Supplier Details

Code: BLA001 Use Account AutoNumber

Category: 3 - Private Longterm Rental Location 1: 2 - Northern Suburbs Location 2: 13 - Constantia

General Information

Name: Vernon Black
Telephone:
Mobile Phone: +27887894561
Email Address: vblack@hotmail.com
Website:
Fax:
 Contact persons with company

Address

Address: 789 Rodeo Drive
Constantia
8989

Email / Sms Options (Professional Version Only)

Company Only
 Contact Persons Only
 Company and Contact Persons

Accept **Cancel**

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

Edit Supplier Details

Code: ESP001 Use Account AutoNumber

Category: 13 - Sales - Private Location 1: 18 - Southern Suburbs Location 2: 30 - Newlands

General Information

Name: Werner Espin
Telephone:
Mobile Phone: 099 444 55 11
Email Address: werner.e@telkomsa.net
Website:
Fax:
 Contact persons with company

Address

Address: The Blue Dolphin Holiday Flats
Nr 7
Bluebell Street
Newlands

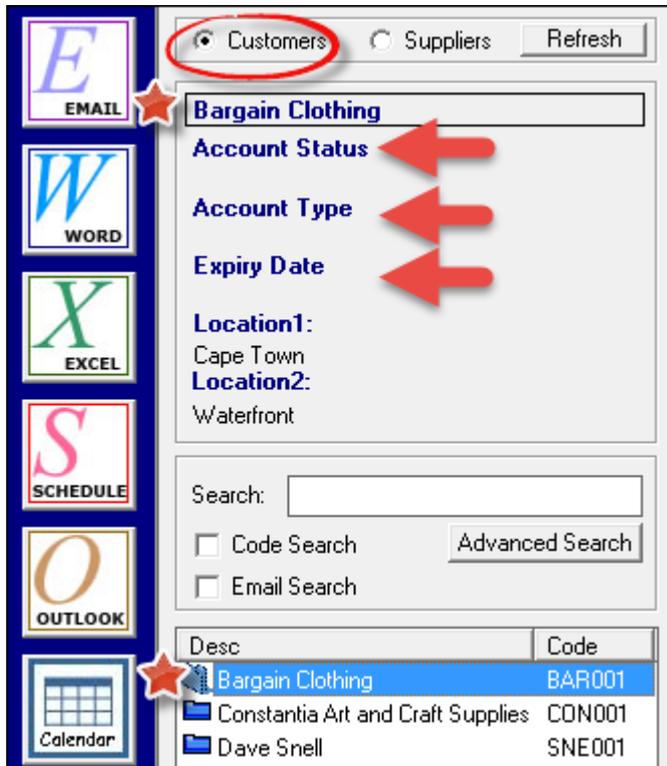
Email / Sms Options (Professional Version Only)

Company Only
 Contact Persons Only
 Company and Contact Persons

Accept **Cancel**

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:

The screenshot displays the 'Relations Management Free Version' interface. On the left is a vertical toolbar with icons for EMAIL, WORD, EXCEL, SCHEDULE, OUTLOOK, and Calendar. The main window shows account details for 'Bargain Clothing'. At the top, there are radio buttons for 'Customers' (selected) and 'Suppliers', and a 'Refresh' button. The account details are as follows:

- Account Status :** Long Term Tenant (indicated by a red arrow)
- Account Type :** Active (indicated by a red arrow)
- Expiry Date :** December (indicated by a red arrow)
- Location1 :** Cape Town (indicated by a red arrow)
- Location2 :** Waterfront

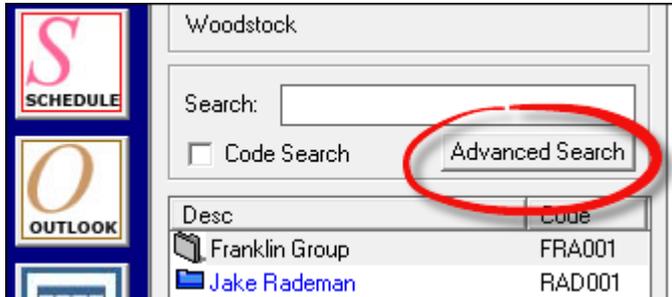
Below the details is a search section with a text input field, a 'Search' button, and checkboxes for 'Code Search' and 'Email Search'. An 'Advanced Search' button is also present. At the bottom, a table lists accounts:

Desc	Code
Bargain Clothing	BAR001
Constantia Art and Craft Supplies	CON001
Dave Snell	SNE001
David Fourie	FOU001

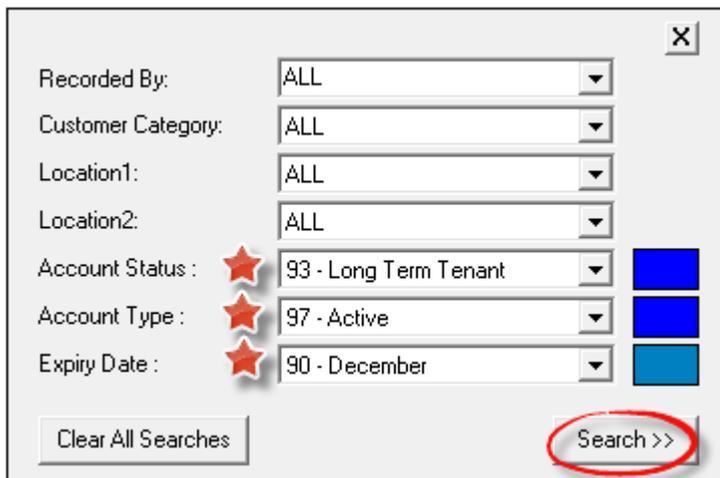
5 Step 3 - Search Capabilities

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:

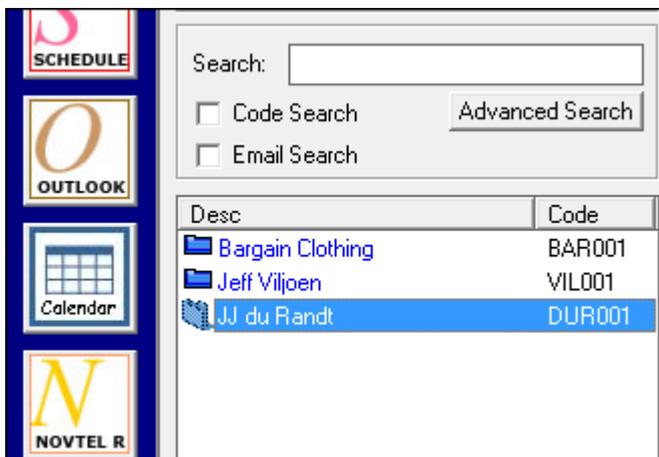
➤ Advanced Search



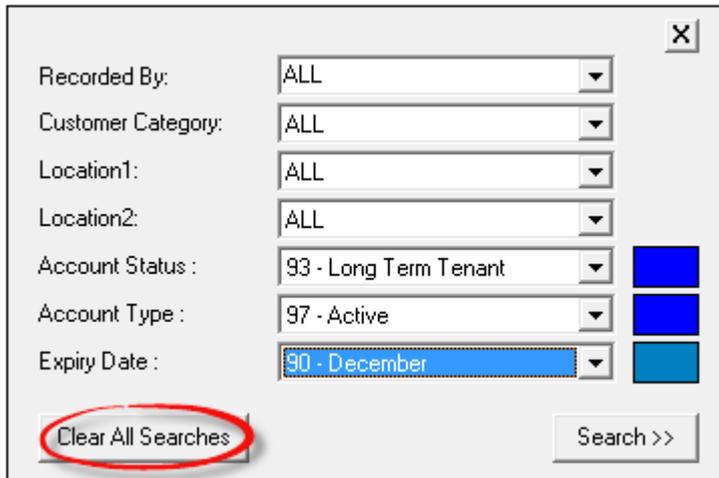
- There are options to search for specific "Categories", "Locations", "Statuses" and "Expiry Dates". In the following example, we are doing a search for all our "Active" "Long Term Tenant" accounts, which expire in December



- Here you can see that every account that meets the search criteria are grouped together



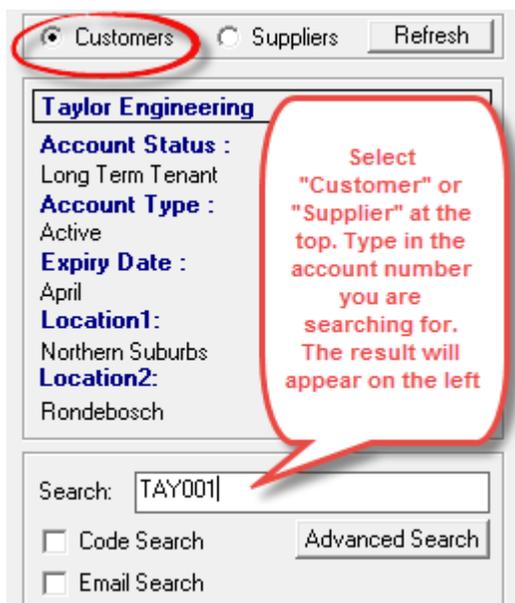
- After you have done the search and worked with the results, click "**Advanced Search**" once more, and "**Clear all Searches**"



Recorded By: ALL
Customer Category: ALL
Location1: ALL
Location2: ALL
Account Status: 93 - Long Term Tenant
Account Type: 97 - Active
Expiry Date: 90 - December

Clear All Searches Search >>

➤ Single Account Search



Customers Suppliers Refresh

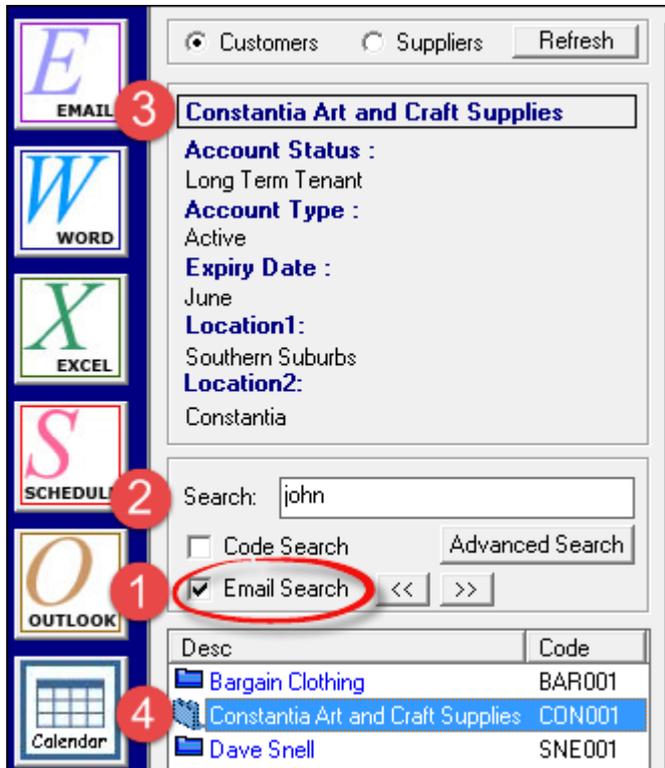
Taylor Engineering
Account Status : Long Term Tenant
Account Type : Active
Expiry Date : April
Location1: Northern Suburbs
Location2: Rondebosch

Search: TAY001
 Code Search Email Search **Advanced Search**

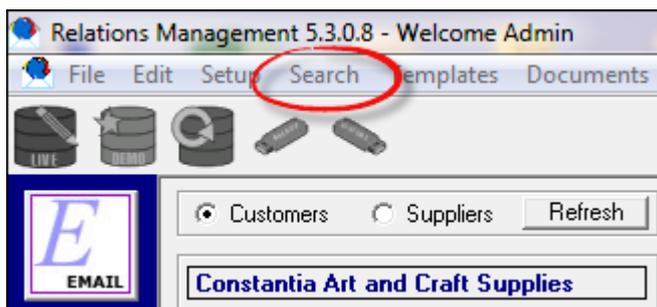
Select "Customer" or "Supplier" at the top. Type in the account number you are searching for. The result will appear on the left

➤ 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"

Search

Contact Numbers Customer / Supplier **Email** Category Current Balance ID Number

Have Email
 No Email
 Email Address johnwilson@art.co.za

Search Cancel

- This will be the result

Customers Suppliers Refresh

Constantia Art and Craft Supplies

Account Status :
Long Term Tenant

Account Type :
Active

Expiry Date :
June

Location1:
Southern Suburbs

Location2:
Constantia

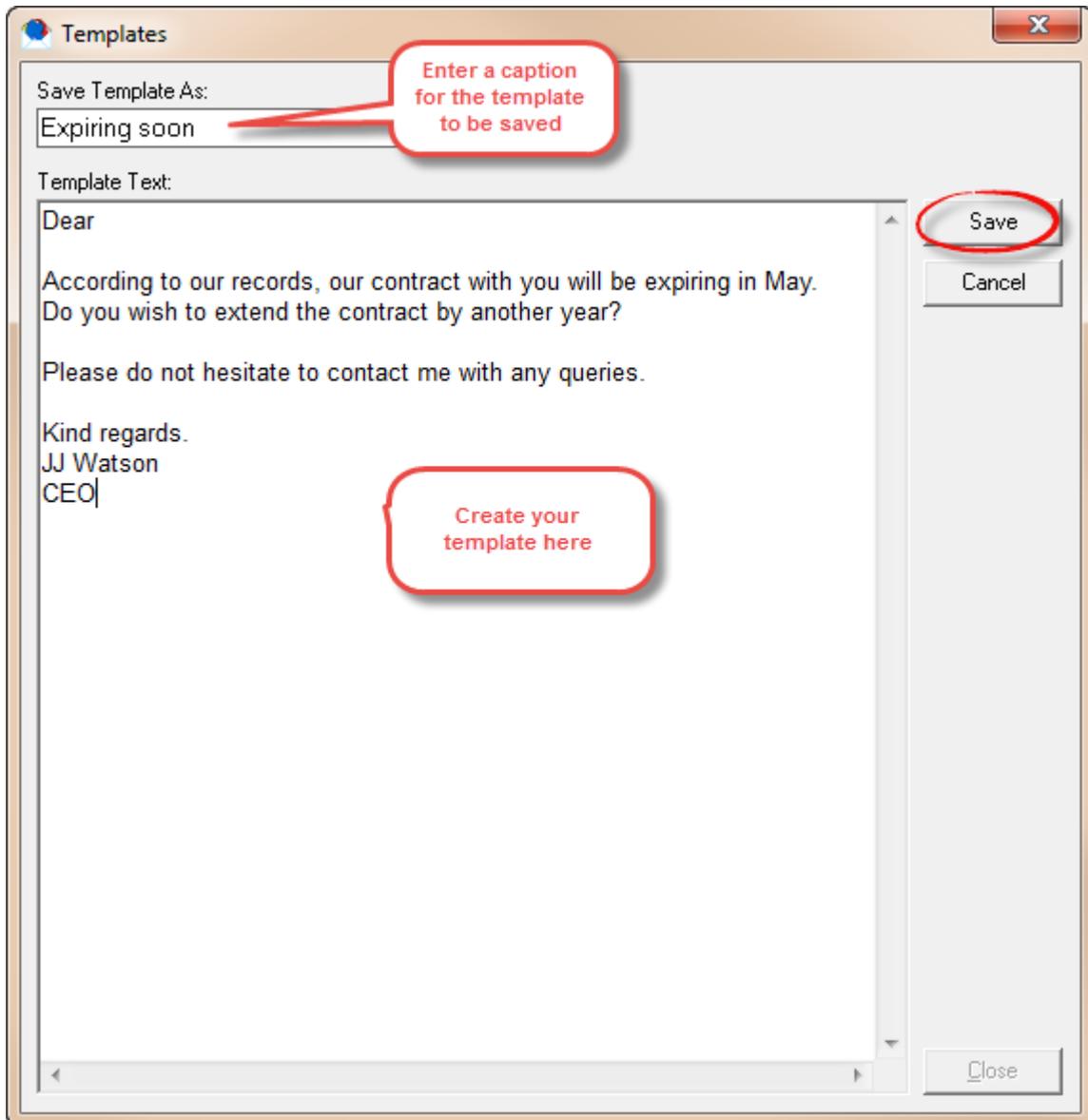
Search:

Code Search Email Search

Desc	Code
Constantia Art and Craft Supplies	CON001

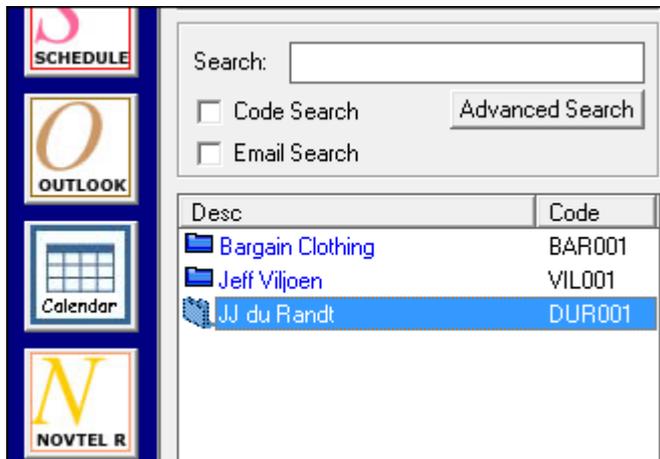
6 Step 4 - Email and SMS Templates

- On the top menu, click on "Templates", "Setup Email/SMS Templates", and then "Add"

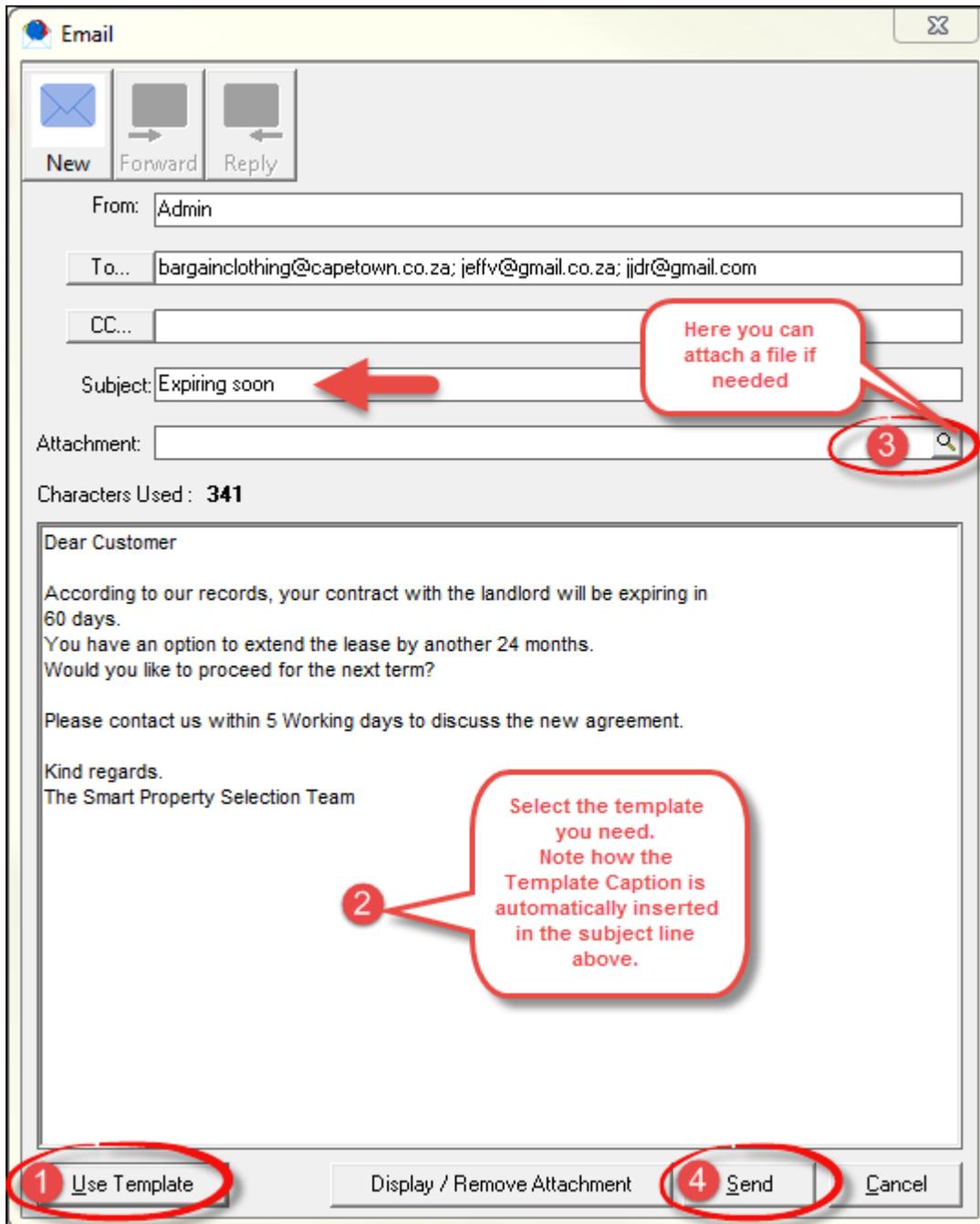


- You can create as many "Templates" as you need. To edit it, just click on the particular "Template", then "Edit" and "Save"

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

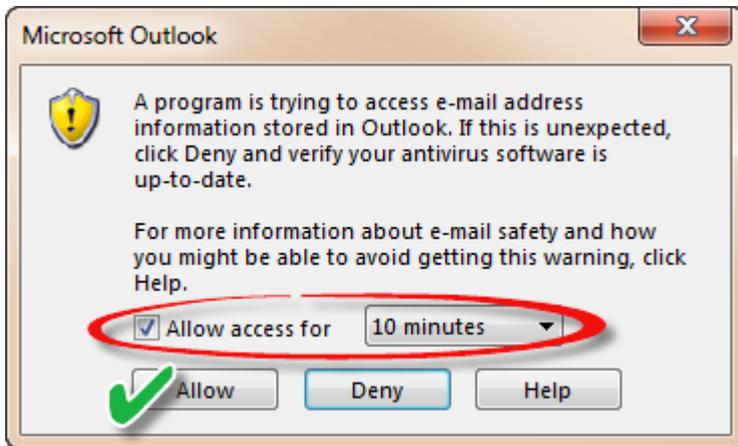
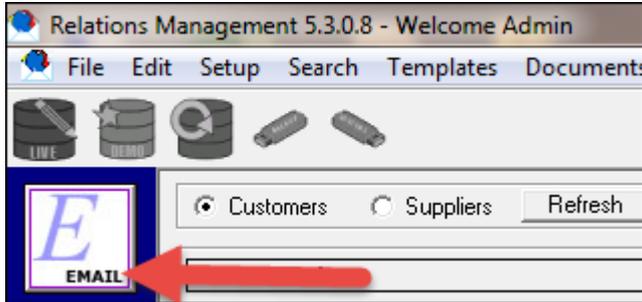
The screenshot shows a software interface with a left sidebar and a main content area. The sidebar contains account details for 'JJ du Randt', including Account Status (Long Term Tenant), Account Type (Active), Expiry Date (December), Location1 (Southern Suburbs), and Location2 (Newlands). Below this is a search section with a search box, 'Code Search' checkbox, 'Email Search' checkbox (checked), and 'Advanced Search' button. At the bottom of the sidebar is a table with columns 'Desc' and 'Code', listing 'Bargain Clothing' (BAR001), 'Jeff Viljoen' (VIL001), and 'JJ du Randt' (DUR001) with a red star icon next to the last entry. The main content area has a table with columns 'Date', 'Time', 'Type', and 'Subject', showing one email entry: '2014/05/19', '12:04:45 PM', 'Email', 'Expiring soon'. A red callout box with a pointer to the 'JJ du Randt' entry in the sidebar contains the text: 'All correspondence to clients will reflect on this screen when you click on the Account on the left.'

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

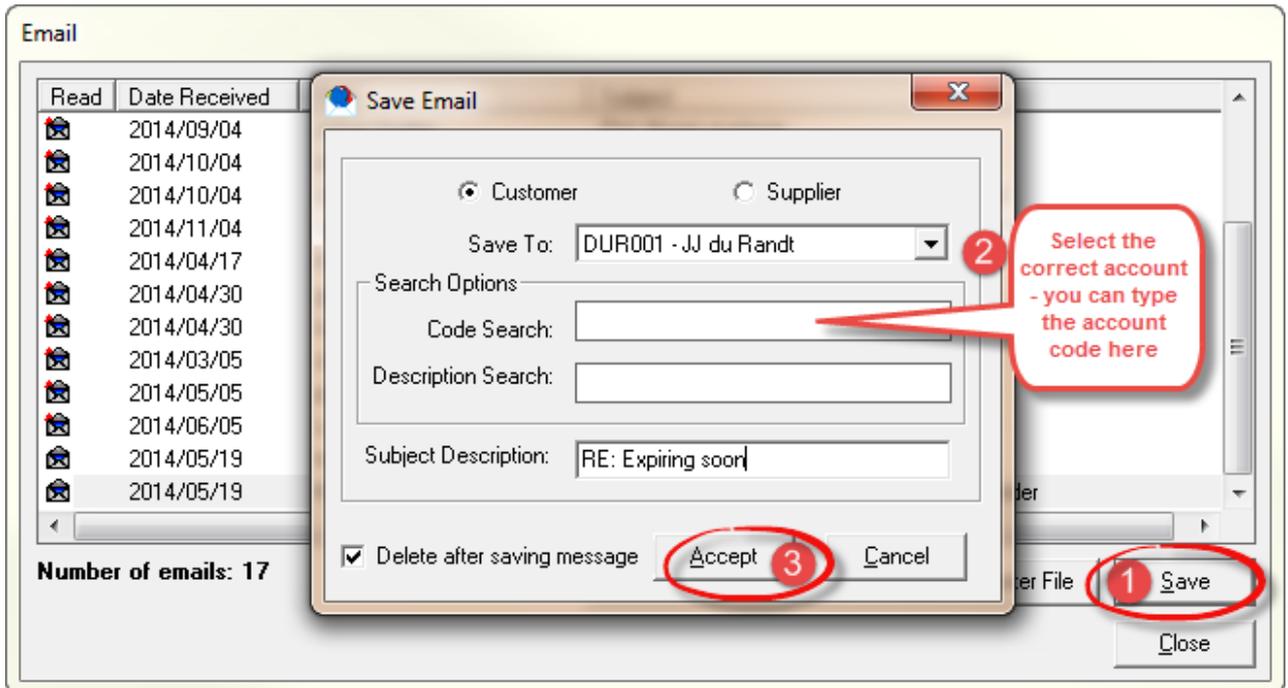
List of Outgoing Email / SMS				
Date and time report was printed 19/05/2014 12:04:45 PM				
Code	Description	Email	Cell	Cust / Supp
DUR001	JJ du Randt	jjdr@gmail.com		Customer

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**"

Log Phone

Description: Phone call - Spoke to JJ

Requested By:

Note:
JJ said that he will probably continue with the lease as it is, but will confirm next week. I need to phone him next week Wednesday at 10:00.

Set as reminder

Save **Cancel**

Enter the details of the Phone Call

- 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

Customers Suppliers Refresh

JJ du Randt ★

Account Status :
Long Term Tenant

Account Type :
Active

Expiry Date :
December

Location1 :
Southern Suburbs

Location2 :
Newlands

Search:

Code Search **Advanced Search**

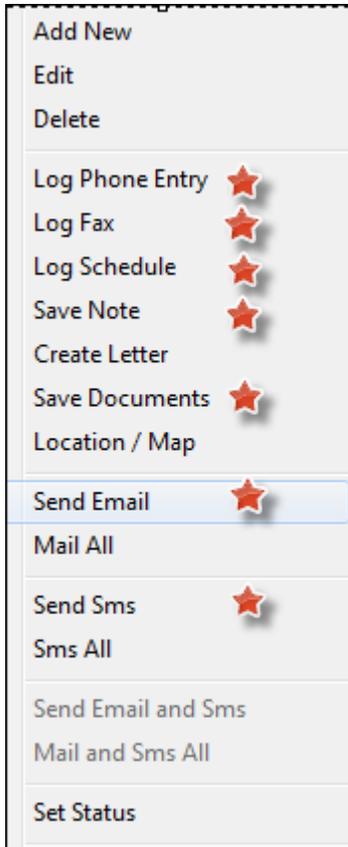
Email Search << >>

Desc	Code
Bargain Clothing	BAR001
Jeff Viljoen	VIL001
JJ du Randt	DUR001

Date	Time	Type	Subject
2014/05/19	02:30:56 PM	Phone	Phone call - Spoke to JJ
2014/05/19	12:55:57 PM	Email	RE: Expiring soon
2014/05/19	12:04:45 PM	Email	Expiring soon

Here you can see all the communication done on JJ Du Randt's account.

- 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

Scheduled Tasks

Tasks Editor

Instruction from Staff: Admin Requested By: Uncompleted and Remind User

Customer/Supplier: JJ du Randt Remind Date: 2014/05/28

Contact Person: JJ Time Start: 10:00:00 PM

Cell: 097 999 8887 Tel: Time End: 10:00:00 PM

Instruction from Admin of the task to be done in detail: Phone JJ in connection with possible renewal of the lease. Detail of how the task was done with reference to any problems:

Send user a email

Save **Cancel** MS Outlook for Admin >>

Active Users:1

Admin Admin (2/2) Open

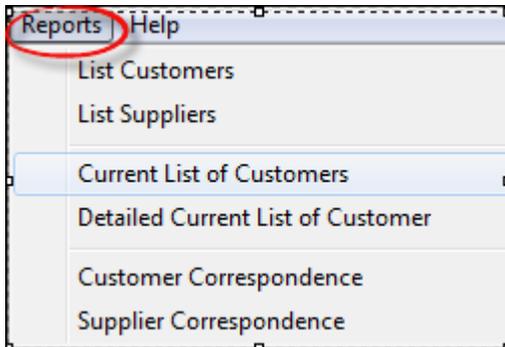
General General

View Tasks

Code	Description	Date	Uncompl..	CustSupp	DocNum

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

Detailed Current List of Customers							
Date and Time Report Printed : 2014/05/19 03:38:35 PM							
Number of entries listed : 12							
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



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