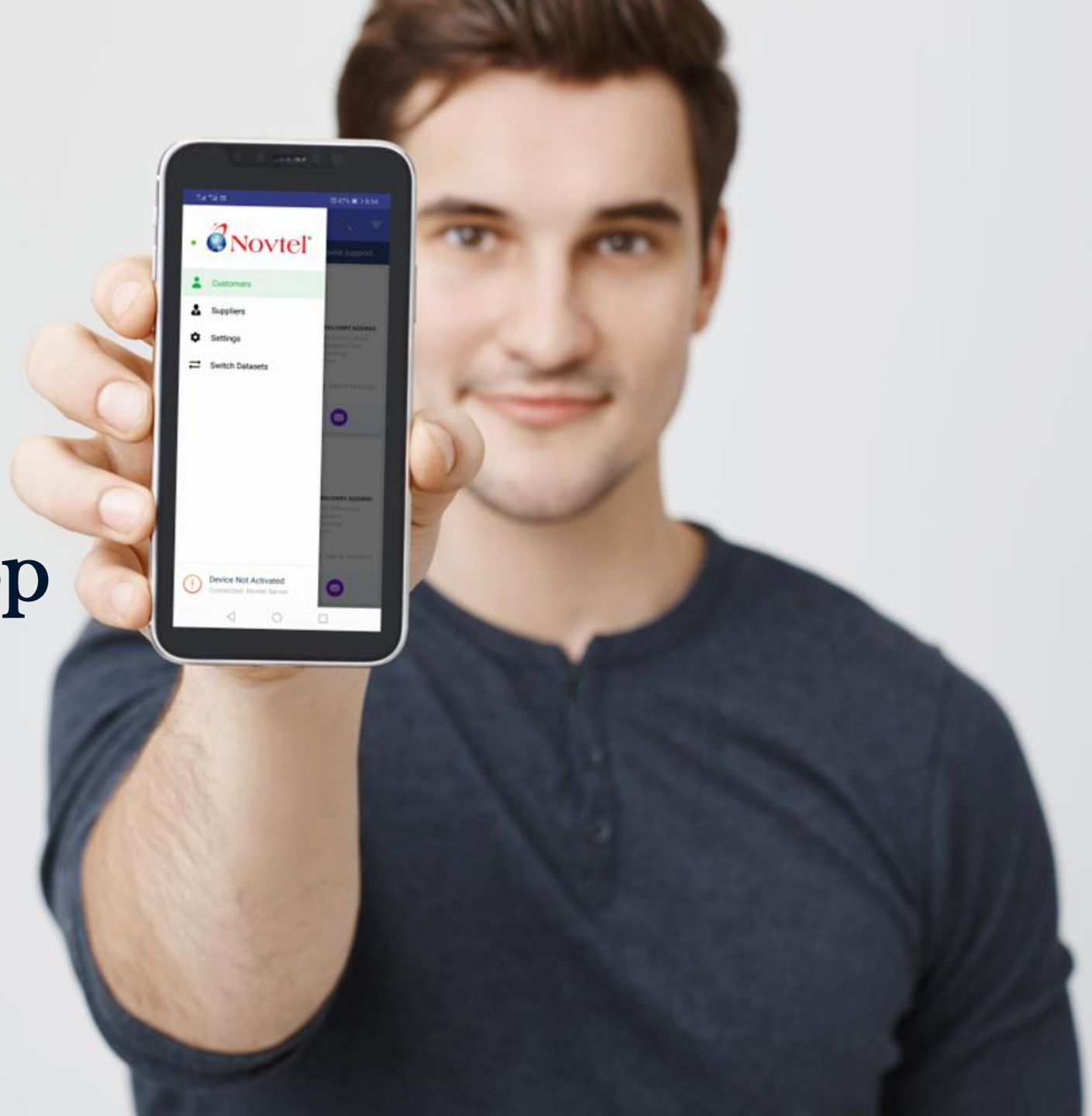




The Invoicing App



INDEX



Click on a number to skip to the required page

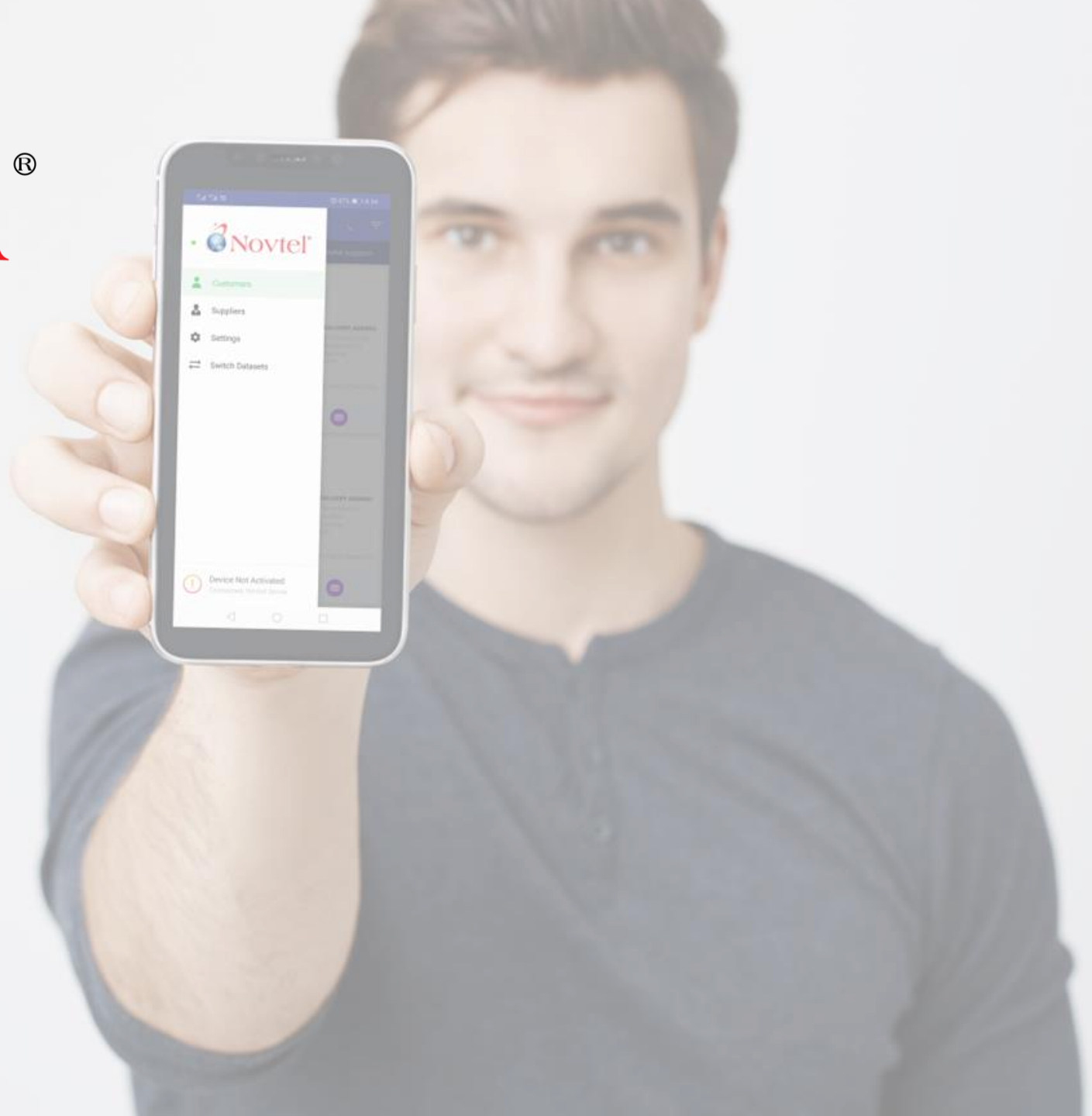
- 1 Introduction
- 2 The Default Settings
- 3 Customers
- 4 Suppliers
- 5 Sage Evolution Selling Prices





1

Introduction





The Demo User

The Novtel Invoicing app is available to any member of the public, interested in the app's features.

**The Demo user can simply download the app from the Google Play store and
test all features on the demo Pastel dataset**

-

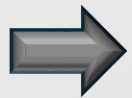
Free of charge!



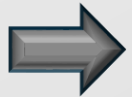
The Registered User

The Novtel Invoicing app integrates to existing Sage Pastel and Sage Evolution databases, allowing the user to perform key tasks on the go.

The Novtel Invoicing app supports any number of:



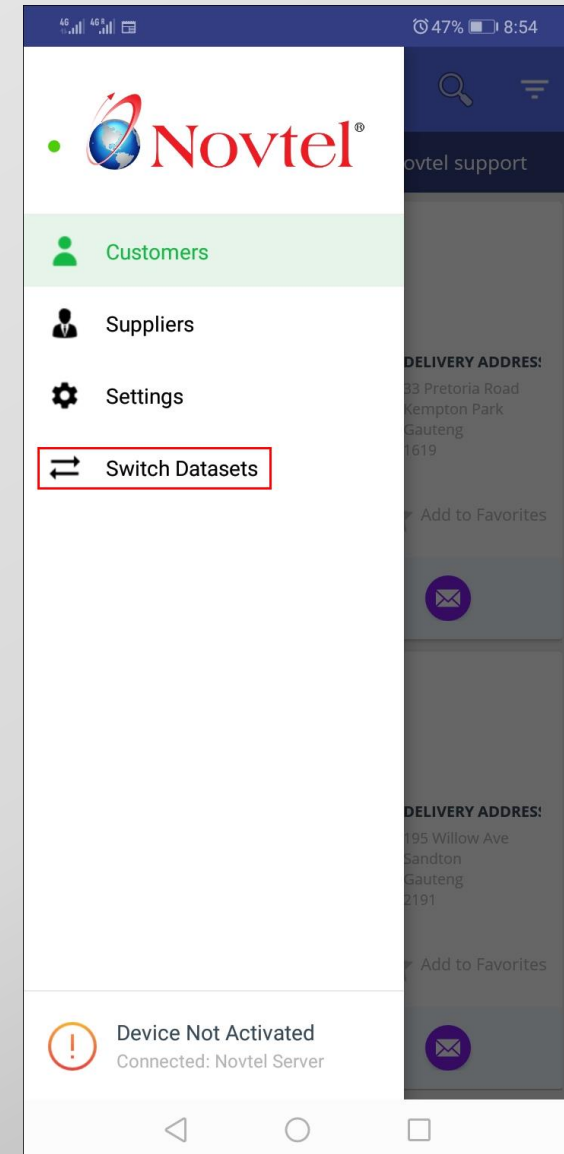
Sage Pastel companies



Or Sage Evolution branches

Each company or branch can be set up as separate datasets, allowing the user to switch seamlessly between different databases and perform work in any database

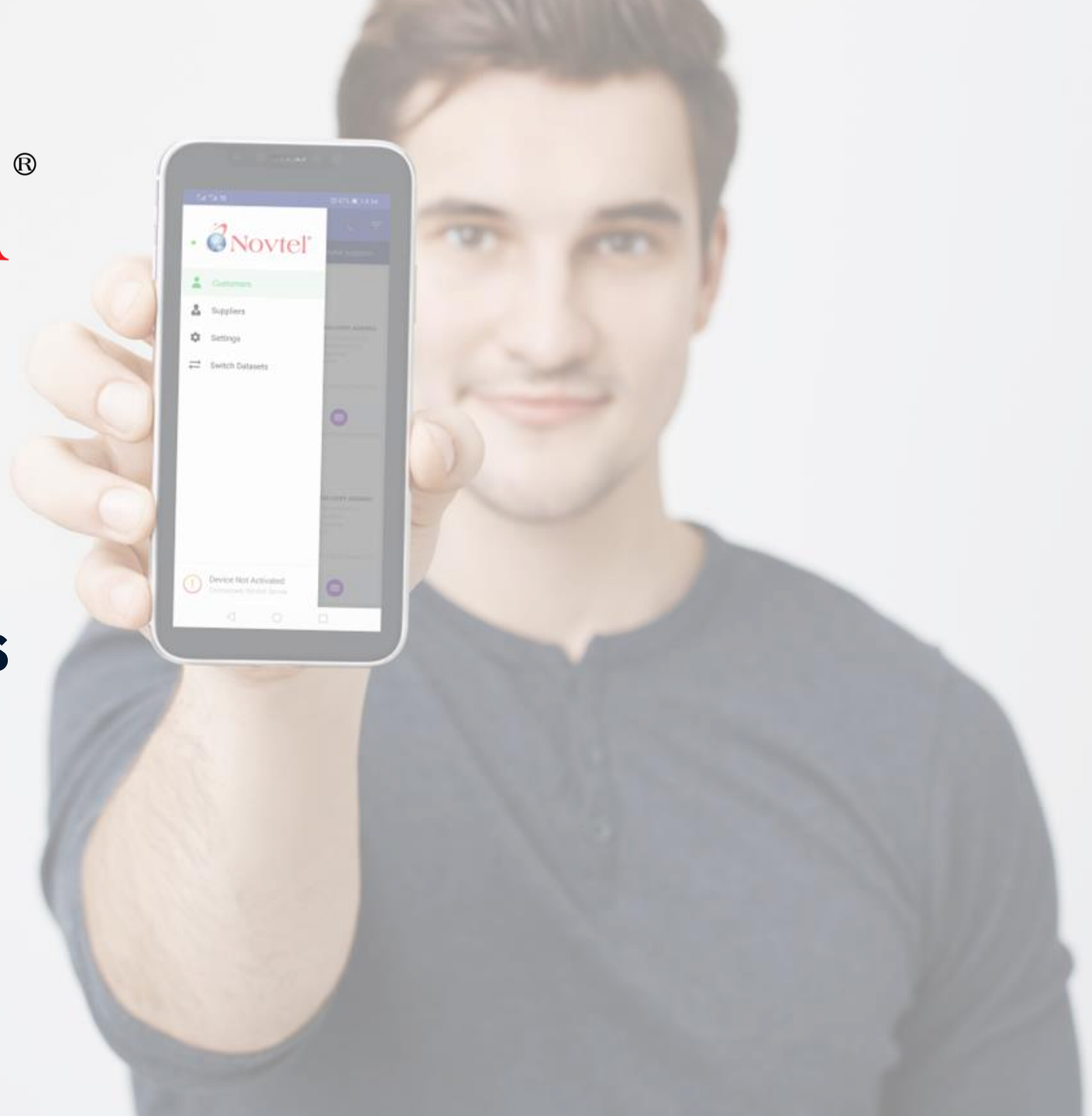
—
PROVIDED that the device is activated and set up by Novtel Support





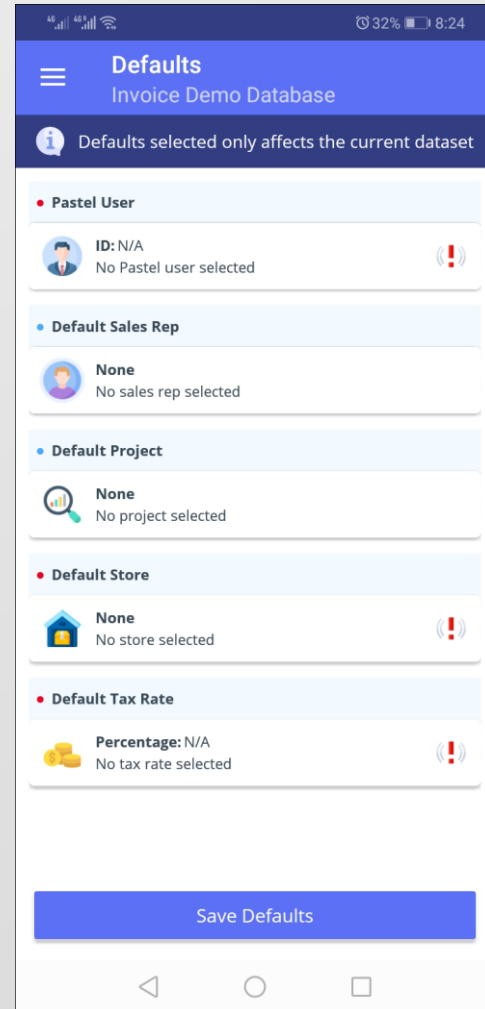
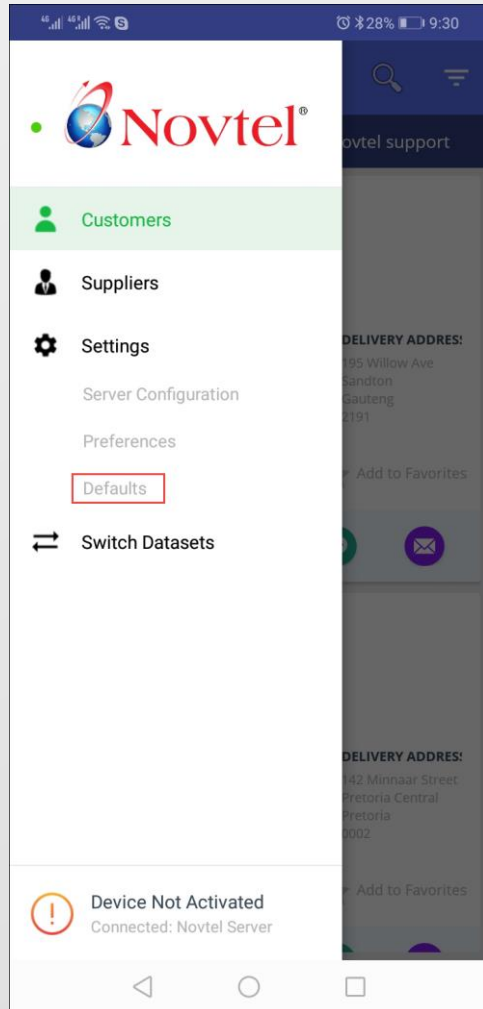
2

The Default Settings





The Default Settings



The default settings are to be set PER DATASET.

The defaults set, ONLY affects the current dataset.

The mandatory fields (marked with a red dot and exclamation mark) **MUST** be selected to process documents:

- **Pastel User**
- **Default Store/Warehouse**
- **Default Tax Rate**

The optional fields are marked with a blue dot.

- Default Sales Rep
- Default Project



Setting and Saving the Defaults

Defaults
Invoice Demo Database

Defaults selected only affects the current dataset

Pastel User

ID: 00
Novtel ☒

Default Sales Rep

SAL02
John Smith ☒

Default Project

None
No project selected

Default Store

001
Cape Town Branch ☒

Default Tax Rate

Percentage: 15%
Vat - Standard rated ☒

Save Defaults

After selecting an option in the 'Mandatory' field, the dot turns green, and the exclamation mark is replaced by a checkmark.

When done, all defaults are to be saved.

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith ☒

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UWACH1	15%	1	45,65	350

Utilities - Water Charge ☒

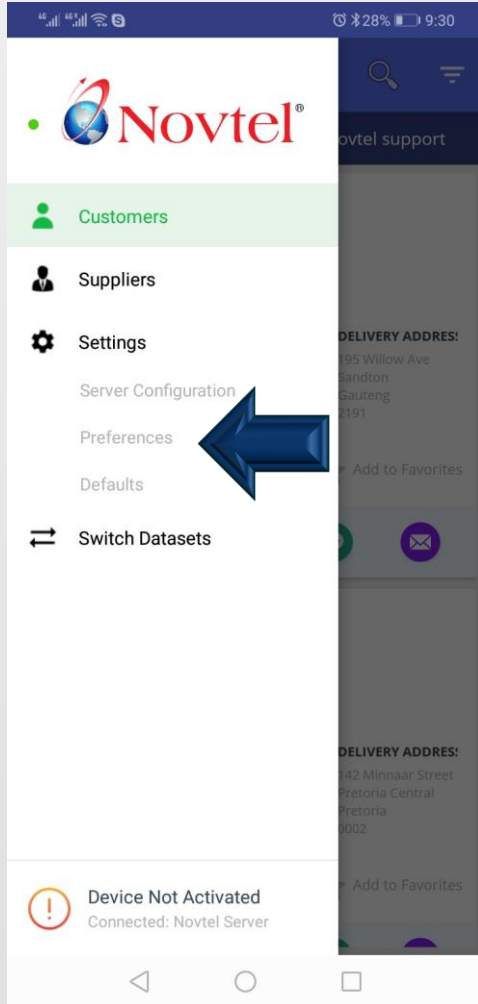
Item **Remark**

Excl Total: R 304,35
Tax Total: R 45,65
Incl Total: R 350,00

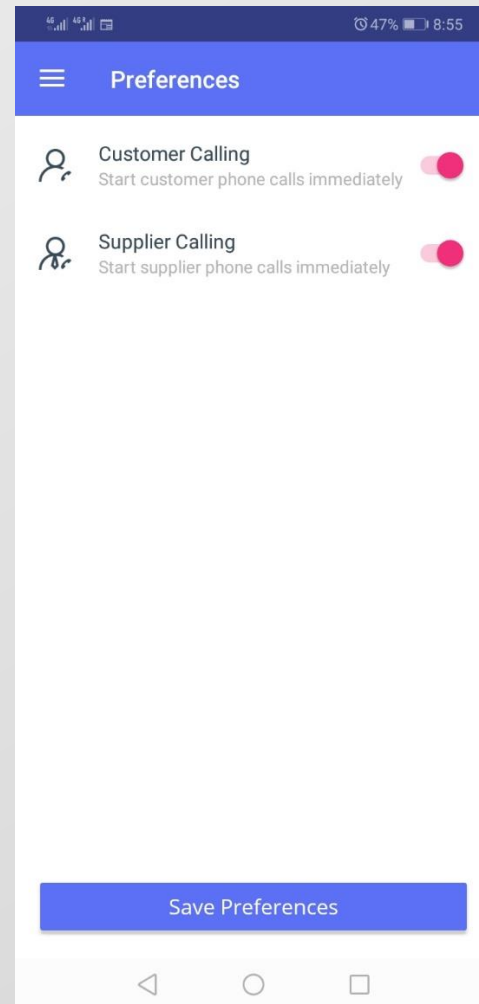
Message
Enter message

The set defaults will now automatically be linked to the documents to be processed but can be changed on the document form - if necessary.

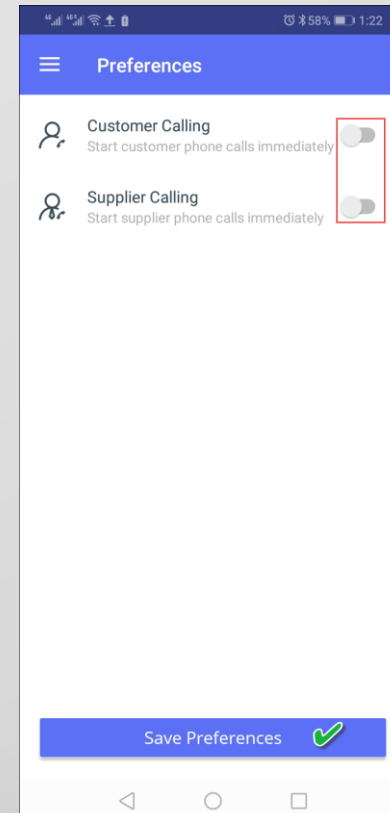
Customer and Supplier Calling Preferences



Under the 'Settings' menu option, both demo and client Users will be able to access the 'Preferences' option.



By default, the options are activated to 'Start Customer or Supplier Phone Calls Immediately' when tapping the 'Call' button.



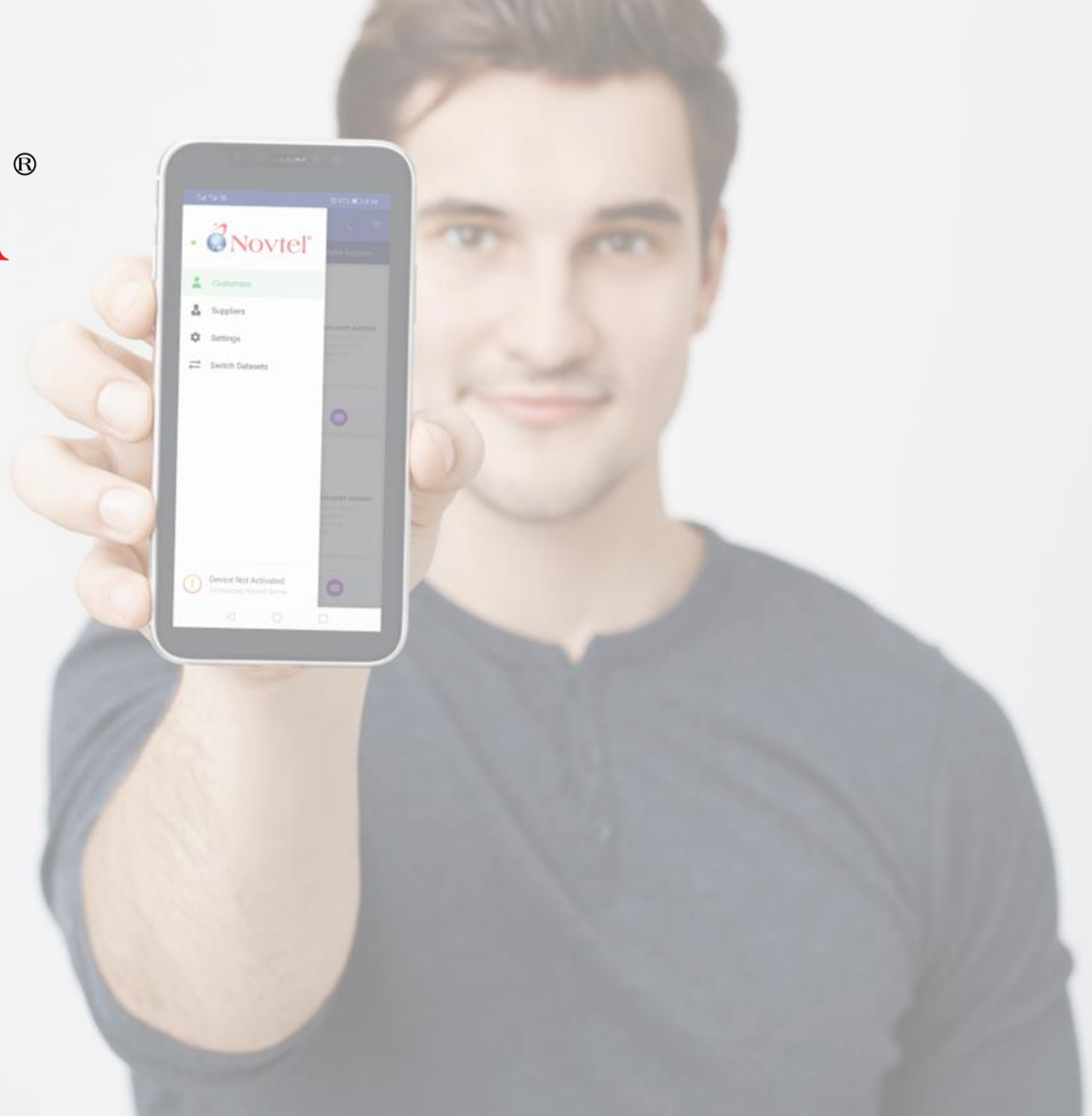
However:

Should you wish to deactivate the option and save the preference, the number will be opened in the dialler screen, and from there the 'call' button can be tapped.



3

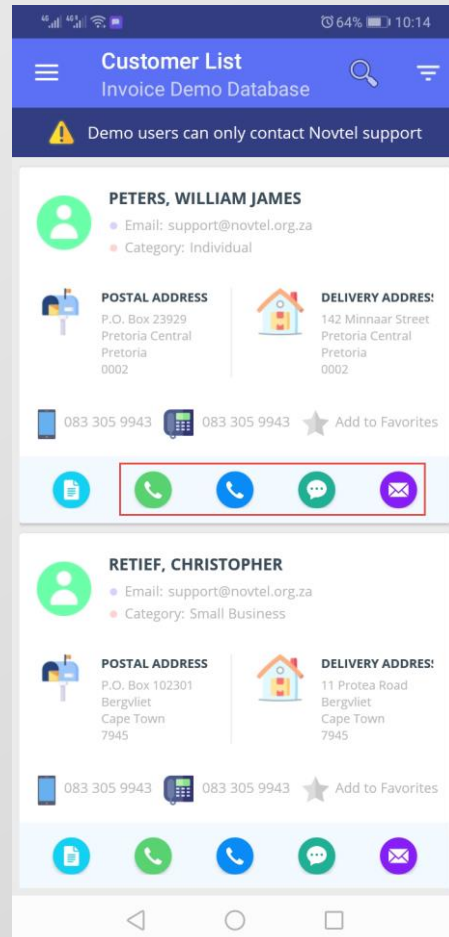
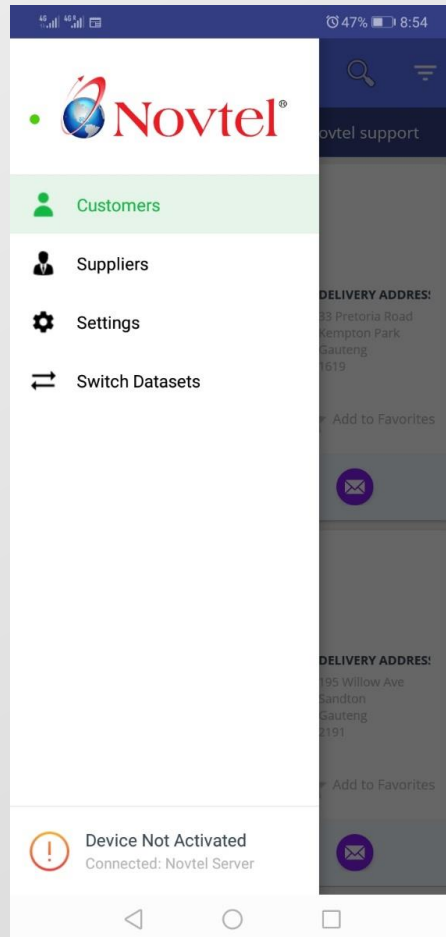
Customers





Contacting your Customers

Your existing Sage Pastel or Sage Evolution customer list can be viewed, and customer information accessed on-the-go.



Contact your Sage Pastel or Sage Evolution Customers at the touch of a button:



Call via Cell or Landline Number

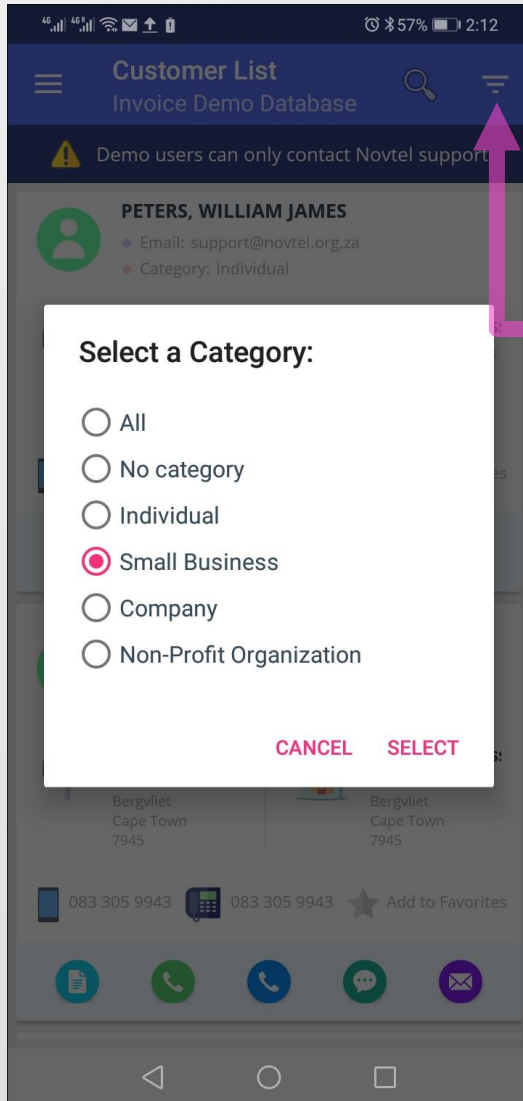


Send a message via WhatsApp or SMS



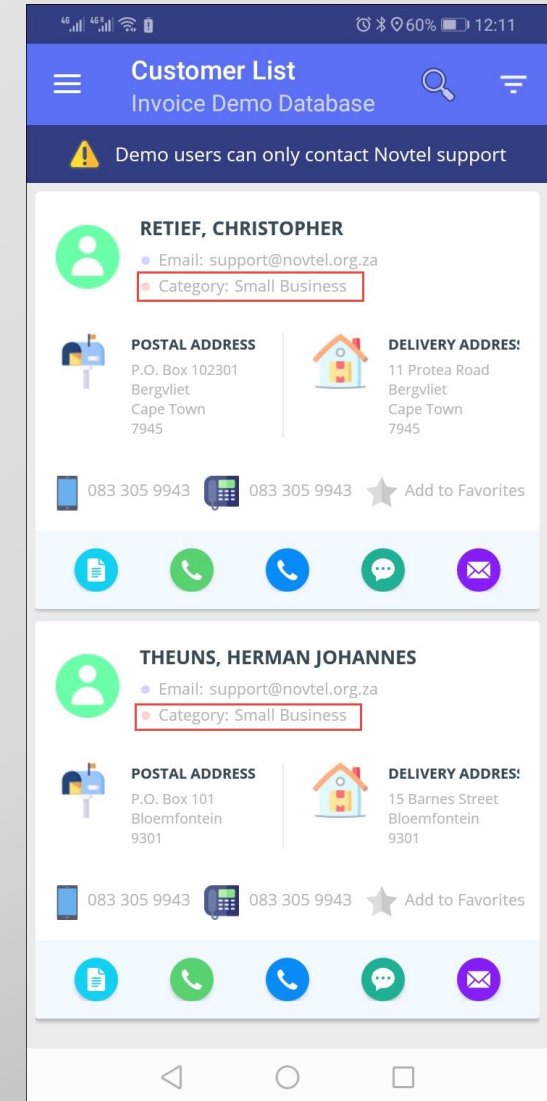
Email them via your android Email app

Search for a Customer by means of the Customer Category



Customer Categories are set up in Sage Pastel and Sage Evolution and linked to the respective Customer Master Files.

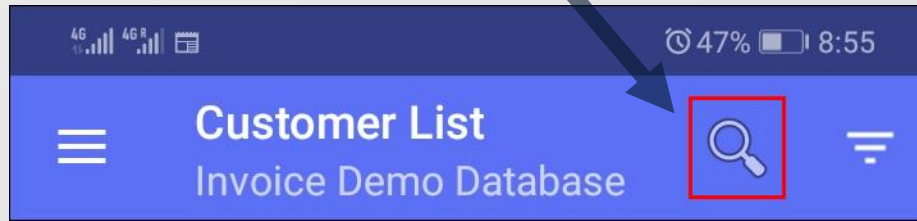
Customers linked to the same Category are listed by clicking on this option in the top right-hand side of the window; selecting the required category and clicking 'Select'.



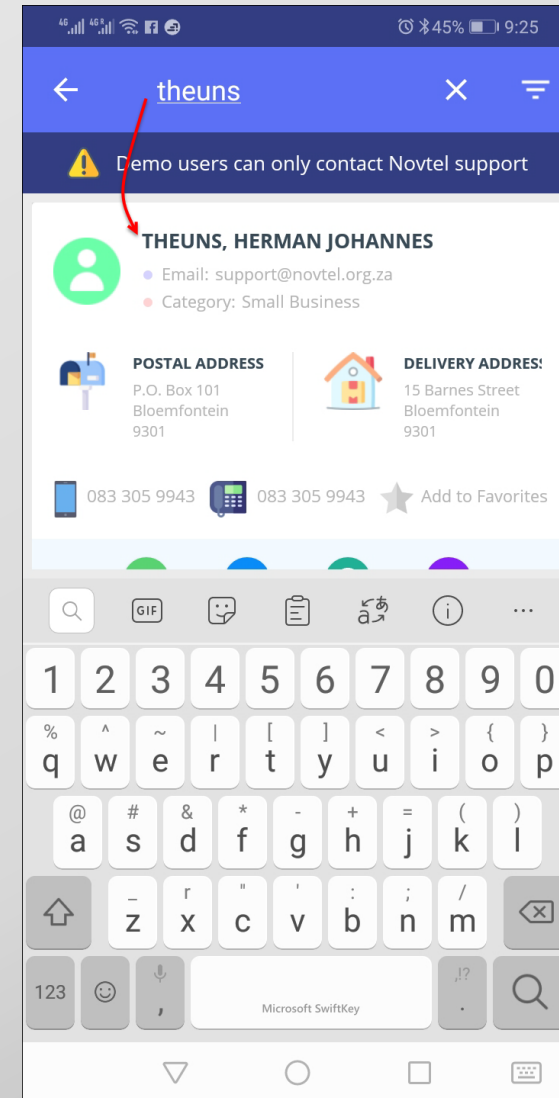


Searching for a Specific Customer

A specific Customer can also be searched for by clicking on the search option here.

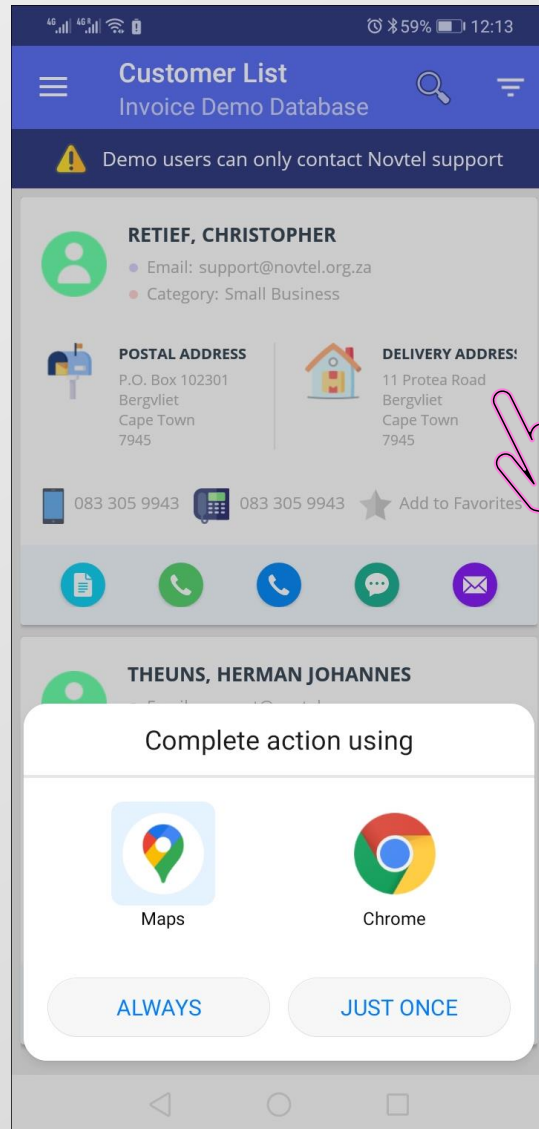


Simply type the Customer's description, or part thereof, and Novtel will match the criteria when found.





Google Maps Integration



Easily view and navigate to your Sage Pastel or Sage Evolution customer and supplier addresses.

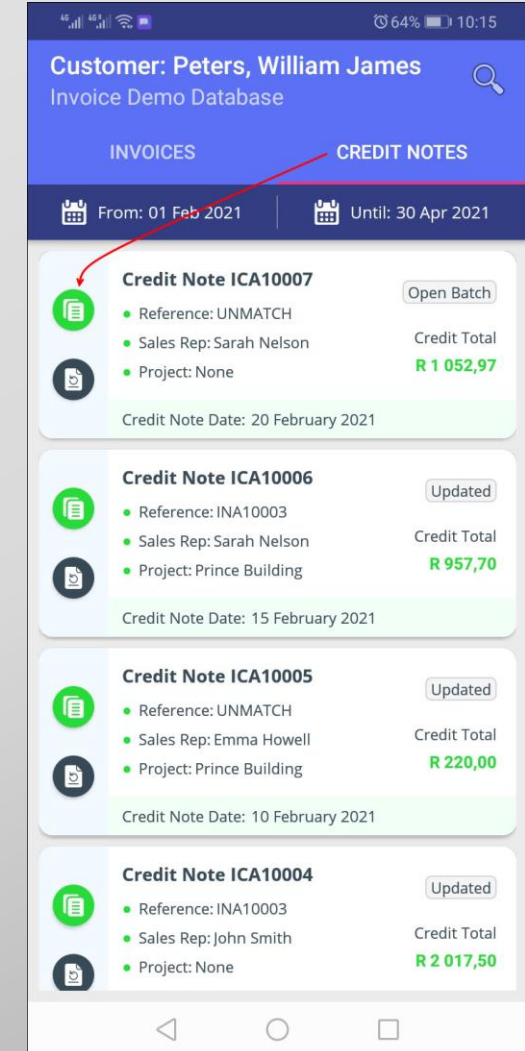
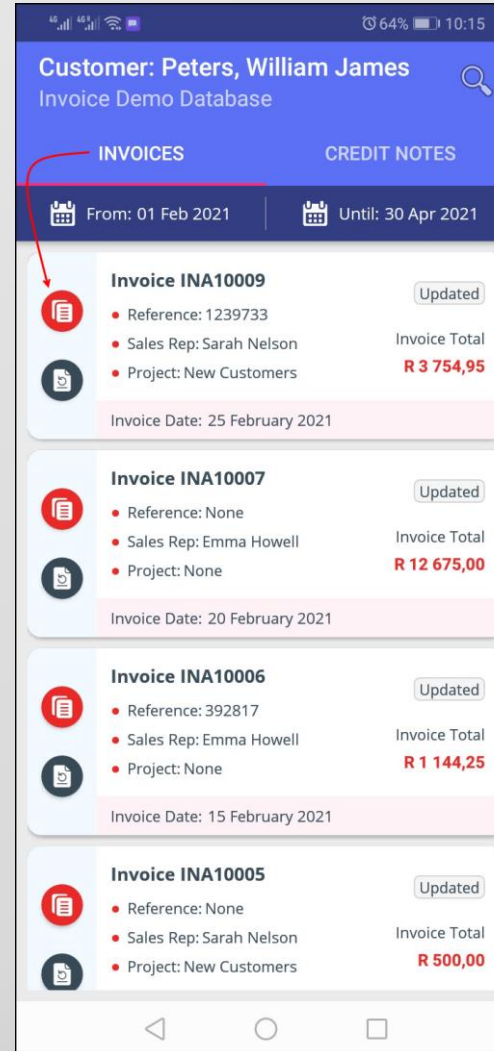
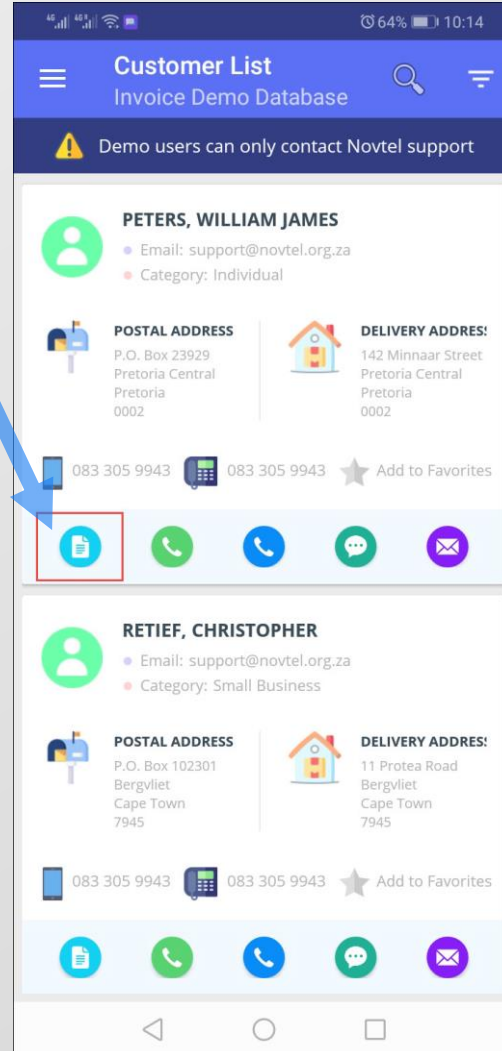
Tap a customer or supplier's postal or delivery address to set a pin in Google maps.

Customer Documents

By default, the 'Invoices' option is selected, and this document type is displayed in red.

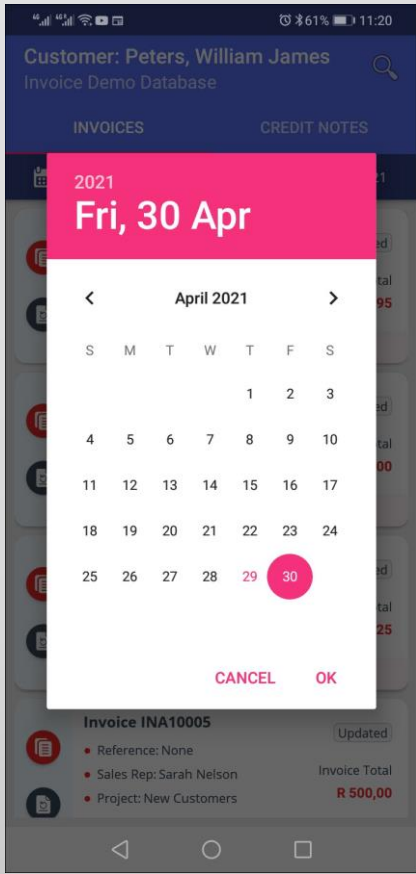
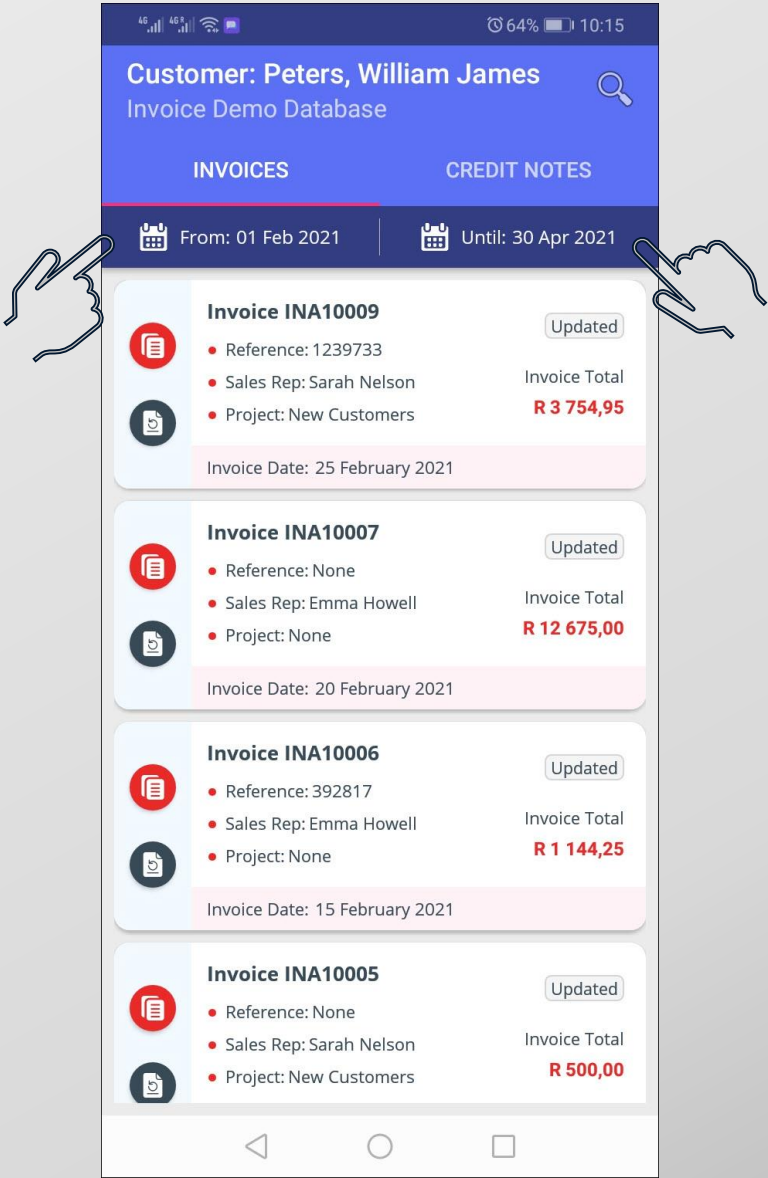
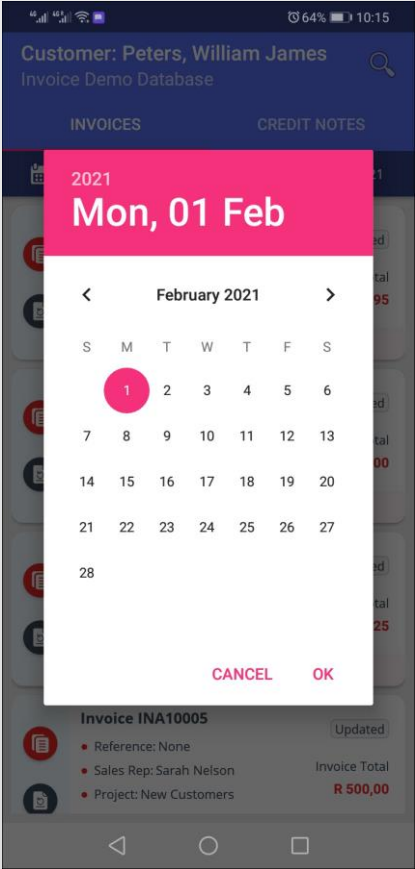
Credit Note Documents are displayed in green.

Existing Invoices and Credit Notes per Customer can be accessed by clicking on the 'Documents' icon.





By tapping on the date options, the calendar will open, and the required date range to be viewed can be selected, respectively.





To view the details of a specific document, simply select the document option first, and tap anywhere in the required document's field – except for on the buttons itself.

Customer: Peters, William James
Invoice Demo Database

INVOICES CREDIT NOTES

From: 01 Feb 2021 Until: 30 Apr 2021

Invoice INA10009

- Reference: 1239733
- Sales Rep: Sarah Nelson
- Project: New Customers

Invoice Date: 25 February 2021

Invoice Total: **R 3 754,95**

Invoice INA10007

- Reference: None
- Sales Rep: Emma Howell
- Project: None

Invoice Date: 20 February 2021

Invoice Total: **R 12 675,00**

Invoice INA10006

- Reference: 392817
- Sales Rep: Emma Howell
- Project: None

Invoice Date: 15 February 2021

Invoice Total: **R 1 144,25**

Invoice INA10005

- Reference: None
- Sales Rep: Sarah Nelson
- Project: New Customers

Invoice Total: **R 500,00**

Customer Invoice Detail
Invoice Demo Database

Customer Details
Peters, William James

INVOICE #
INA10009

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria 0002

Postal Address
No Postal Address

Invoice Date: 25 Feb 2021
Reference: 1239733
Sales Rep: Sarah Nelson
Project: New Customers

Type	Description	Qty	Tax Total	Incl Total
Item	Cost - Guest House	5,0	0,00	3 754,95

Excl Total: R 3 754,95
Tax Total: R 0,00
Incl Total: **R 3 754,95**

Message
No Message Lines

Customer: Peters, William James
Invoice Demo Database

INVOICES CREDIT NOTES

From: 01 Feb 2021 Until: 30 Apr 2021

Credit Note ICA10007

- Reference: UNMATCH
- Sales Rep: Sarah Nelson
- Project: None

Credit Note Date: 20 February 2021

Credit Total: **R 1 052,97**

Credit Note ICA10006

- Reference: INA10003
- Sales Rep: Sarah Nelson
- Project: Prince Building

Credit Note Date: 15 February 2021

Credit Total: **R 957,70**

Credit Note ICA10005

- Reference: UNMATCH
- Sales Rep: Emma Howell
- Project: Prince Building

Credit Note Date: 10 February 2021

Credit Total: **R 220,00**

Credit Note ICA10004

- Reference: INA10003
- Sales Rep: John Smith
- Project: None

Credit Total: **R 2 017,50**

Customer Credit Note Detail
Invoice Demo Database

Customer Details
Peters, William James

CREDIT NOTE #
ICA10007

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria 0002

Postal Address
No Postal Address

Credit Note Date: 20 Feb 2021
Reference: UNMATCH
Sales Rep: Sarah Nelson
Project: None

Type	Description	Qty	Tax Total	Incl Total
Item	Costs - Rates & Taxes	3,0	0,00	452,97
Item	Cost - Guest House	2,0	0,00	600,00

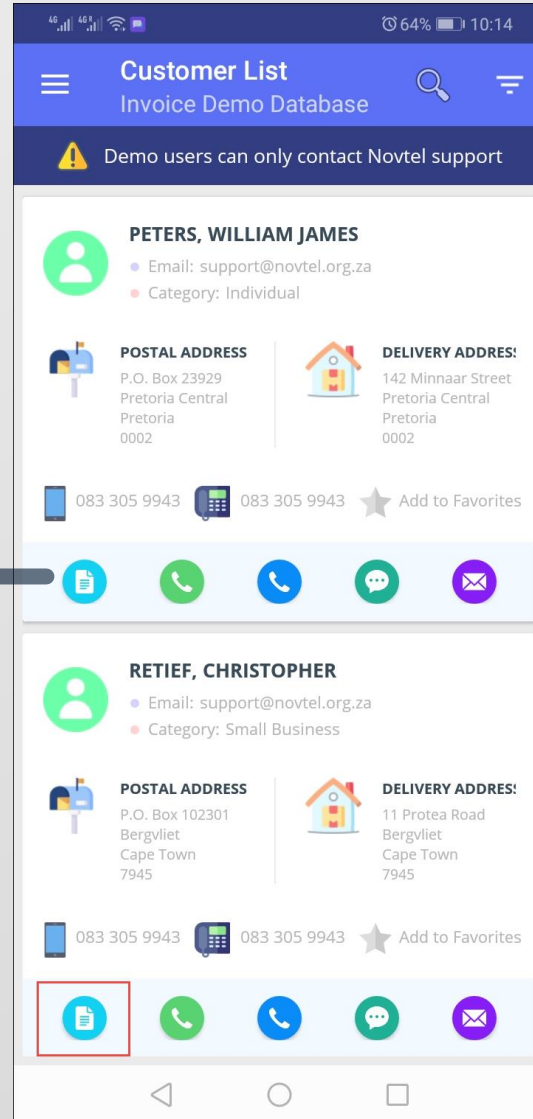
Excl Total: R 1 052,97
Tax Total: R 0,00
Incl Total: **R 1 052,97**

Message
No Message Lines

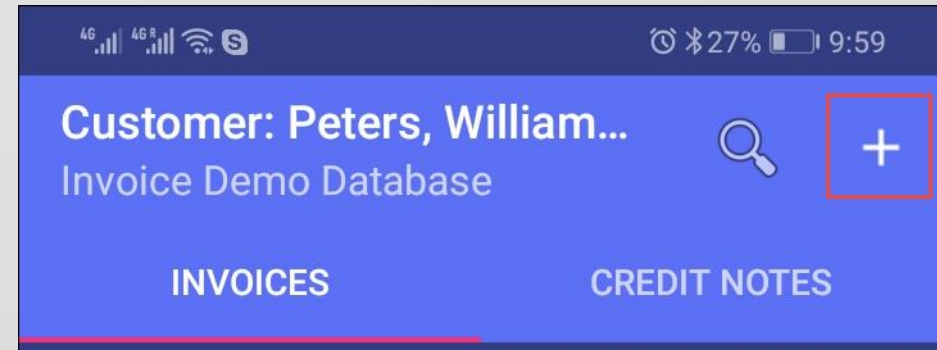


Creating Customer Documents

To start the process of issuing an Invoice or Credit Note, tap the relevant Customer's Document icon.



To create an Invoice, the option is selected and the + sign tapped. Alternatively, select the 'Credit Note' option and tap the + sign





To add line items, tap the '+ Item' option, after which the 'Select Item' option is tapped.

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	Select item	15%	1	0,00	0,00

Enter line description

+ Item **+ Remark**

Excl Total: R 0,00
Tax Total: R 0,00
Incl Total: **R 0,00**

Message
Enter message

Upload icon

Search...

Active Store Filter: 001 - Cape Town Branch

CCLEA1
Cost - Cleaning

CDISC1
Cost - Discounts

CDSTV1
Cost - DSTV

CGUES1
Cost - Guest House

CINTE1
Cost - Interest on Arrears

dankie hi I

1 2 3 4 5 6 7 8 9 0

% ^ ~ | [] < > { }

q w e r t y u i o p

@ # & * - + = ()

a s d f g h j k l

↑ _ r " ' : ; / ↵

123 😊 🔊 Microsoft SwiftKey 🔍

All Items linked to the selected Store, will now be displayed and the relevant Item can be searched for and selected.



4G 31% 8:29

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UWACH1	15%	1	0,00	0,00

Utilities - Water Charge

R & _ - 1 2 3 ?
@ () = + 4 5 6 !
{&= ' : % / 7 8 9 <X>
abc " _ * , 0 . <X>

Important!

The quantity can never be less than 1 but can be changed to more than 1 if required.

Enter the Total amount for the selected document line.

Novtel automatically calculates the Tax amount according to the default tax percentage set.

4G 31% 8:29

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UWACH1	15%	1	45,65	350

Utilities - Water Charge

Item **Remark** **Excl Total:** R 304,35
Tax Total: R 45,65
Incl Total: R 350,00

Message
Enter message

Uploading icon



Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UWACH1	15%	1	45,65	350

Utilities - Water Charge

Item **Remark**

Excl Total: R 304,35
Tax Total: R 45,65
Incl Total: **R 350,00**

Enter remarks by tapping this option

Submit Invoice

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Submit Invoice

Are you sure you would like to submit this invoice now?

CANCEL CONTINUE

Message

Enter message

By tapping the 'Submit' button, Novtel will wish to confirm the action.

➤ Tapping 'Cancel', changes can still be made to the document.

➤ Tapping 'Continue', the document will immediately be available in Sage Pastel / Evolution

Customer: Peters, William...
Invoice Demo Database

INVOICES **CREDIT NOTES**

From: 01 Apr 2021 | Until: 30 Jun 2021

Invoice INA10018 **Open Batch**

- Reference: None
- Sales Rep: John Smith
- Project: None

Invoice Total: **R 350,00**

Invoice Date: 02 June 2021

Invoice INA20014 **Open Batch**

- Reference: Order 3301
- Sales Rep: Matt Howell
- Project: Industrial Park

Invoice Total: **R 1 400,35**

Invoice Date: 01 June 2021

The document will also be captured to the app and can be viewed directly from this screen.



Removing Line Items

While in the process of creating a document, line items can be removed by clicking on the red 'x' for the Item to be removed.

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UELSF1	15%	1	129,13	990

Utilities - Electricity Surcharge Flat → x

Item **Remark** **Excl Total:** R 860,87
Tax Total: R 129,13
Incl Total: **R 990,00**

Message
Enter message

Upload icon

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Delete Line

Are you sure you want to delete the line for item 'UELSF1 - Utilities - Electricity Surcharge Flat'?

CANCEL **CONTINUE**

Item **Remark** **Excl Total:** R 860,87
Tax Total: R 129,13
Incl Total: **R 990,00**

Message
Enter message

Upload icon

In doing so, Novtel will wish to confirm the action, and will indicate which item is to be removed.

Crediting an entire Document

Customer: Peters, William...
Invoice Demo Database

INVOICES CREDIT NOTES

From: 01 Apr 2021 Until: 30 Jun 2021

Invoice INA10018 Open Batch

- Reference: None
- Sales Rep: John Smith
- Project: None

Invoice Total: **R 350,00**

Invoice Date: 02 June 2021

Invoice INA20014 Open Batch

- Reference: Order 3301
- Sales Rep: Matt Howell
- Project: Industrial Park

Invoice Total: **R 1 400,35**

Invoice Date: 01 June 2021

Customer: Peters, William James
Invoice Demo Database

NEW CREDIT NOTE

Delivery Address

142 Minnaar Street
Pretoria Central
Pretoria
0002

Credit Note Date
02 Jun 2021

Original Invoice
INA10018

Postal Address

P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UWACH1	15%	1	45,65	350,00
Utilities - Water Charge					

Excl Total: R 304,35
Tax Total: R 45,65
Incl Total: **R 350,00**

Message
Enter message

Submit

An entire Invoice can be reversed, and a credit note issued in a few easy steps:

By tapping the 'Reverse Document' icon for a specific document, the 'Credit Note' screen is opened, and all items linked to the invoice, will automatically be captured.

Tapping the 'Submit' button, Novtel will wish to confirm the action.

Tapping 'Continue', the Credit Note is issued and will immediately be available in Sage Pastel / Evolution.

Customer: Peters, William James
Invoice Demo Database

NEW CREDIT NOTE

Delivery Address

142 Minnaar Street
Pretoria Central
Pretoria
0002

Credit Note Date
02 Jun 2021

Original Invoice
INA10018

Postal Address

P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
John Smith

Project
Select project

Submit Credit Note

Are you sure you would like to submit this credit note now?

CANCEL CONTINUE

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
001	UWACH1	15%	1	45,65	350,00
Utilities - Water Charge					

Excl Total: R 304,35
Tax Total: R 45,65
Incl Total: **R 350,00**

Message
Enter message

Submit

Customer: Peters, William...
Invoice Demo Database

INVOICES CREDIT NOTES

From: 01 Apr 2021 Until: 30 Jun 2021

Credit Note ICA10008 Open Batch

- Original Invoice: INA10018
- Sales Rep: John Smith
- Project: None

Credit Total: **R 350,00**

Credit Note Date: 02 June 2021

Credit Note ICA20002 Open Batch

- Original Invoice: INA20014
- Sales Rep: Matt Howell
- Project: Industrial Park

Credit Total: **R 1 400,35**

Credit Note Date: 01 June 2021



Crediting Specific Items

4G 4G R 31% 8:31

Customer: Peters, William... Invoice Demo Database

INVOICES CREDIT NOTES

From: 01 Apr 2021 Until: 30 Jun 2021

Credit Note ICA10008 Open Batch

- Original Invoice: INA10018
- Sales Rep: John Smith
- Project: None

Credit Total
R 350,00

Credit Note Date: 02 June 2021

Credit Note ICA20002 Open Batch

- Original Invoice: INA20014
- Sales Rep: Matt Howell
- Project: Industrial Park

Credit Total
R 1 400,35

Credit Note Date: 01 June 2021

By tapping the '+ Sign' in the right-hand side of the screen, Items and Remarks can be added in the same way than when an invoice is created.



Open Batch VS Updated Documents

Customer: Xiao Yong, Chen	
Invoice Demo Database	
INVOICES	
CREDIT NOTES	
From: 01 Apr 2021	Until: 30 Jun 2021
Invoice INA20015	Open Batch
<ul style="list-style-type: none">Reference: NoneSales Rep: Brian BassettProject: Trichaard Villa	Invoice Total R 5,001.98
Invoice Date: 02 June 2021	
Invoice INA20013	Open Batch
<ul style="list-style-type: none">Reference: NoneSales Rep: Brian BassettProject: Trichaard Villa	Invoice Total R 5,001.98
Invoice Date: 01 June 2021	
Invoice INA10017	Updated
<ul style="list-style-type: none">Reference: NoneSales Rep: NoneProject: None	Invoice Total R 3,601.05
Invoice Date: 12 May 2021	
Invoice INA10016	Updated
<ul style="list-style-type: none">Reference: NoneSales Rep: NoneProject: None	Invoice Total R 0.00

Directly from the app, the User will be able to see if documents are still tied to an 'Open Batch' – pending an update in the financial system, or whether the batch was updated already.

Document Templates

A specific document can be used as a template by clicking on this icon in the relevant Document Type screen.

Customer: Xiao Yong, Chen
Invoice Demo Database

INVOICES CREDIT NOTES

From: 01 Apr 2021 | Until: 30 Jun 2021

Invoice INA20015 Open Batch

- Reference: None
- Sales Rep: Brian Bassett
- Project: Trichaard Villa

Invoice Total
R 5,001.98

Invoice Date: 02 June 2021

Customer: Xiao Yong, Chen
Invoice Demo Database

NEW INVOICE

Delivery Address
195 Willow Ave
Sandton
Gauteng
2191

Invoice Date
02 Jun 2021

Reference
Enter reference

Postal Address
P.O. Box 84626
Sandton
Gauteng
2191

Sales Rep
Brian Bassett

Project
Trichaard Villa

Store	Inventory	Tax %	Qty	Total Tax	Total Incl
002	CINTE1	14%	5	184.33	1,500.99
• Cost - Interest on Arrears					
• Test Remark					
003	CREPA1	15%	2	456.65	3,500.99
• Cost - Repair & Maintenance					

Item **Remark** **Excl Total:** R 4,361.00
Tax Total: R 640.98
Incl Total: **R 5,001.98**

Message
Enter message

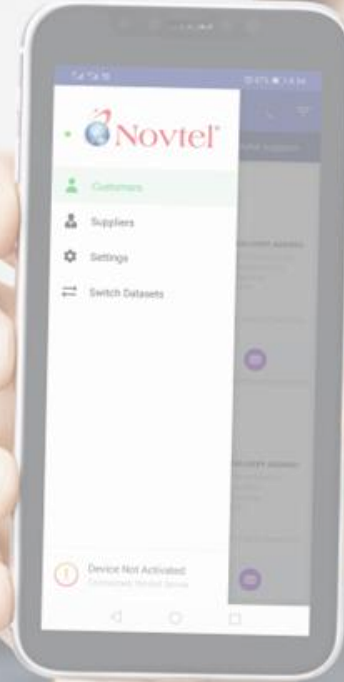
All details linked to the copied document will be entered here, but with the current date, and is indicated as a new document.

Changes can be made to the template and when done, it can be submitted.



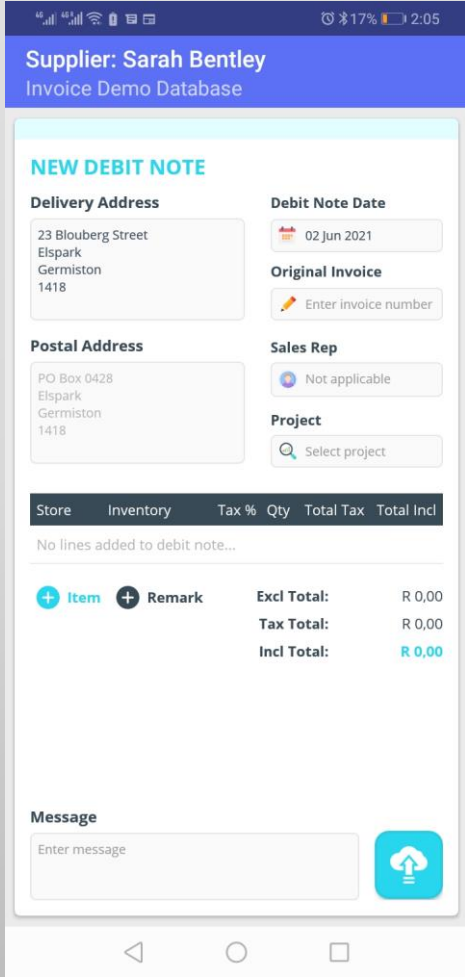
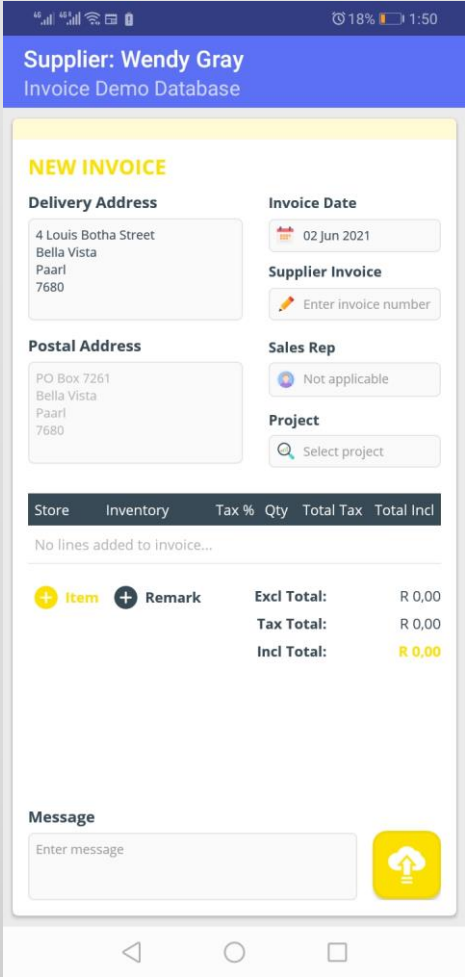
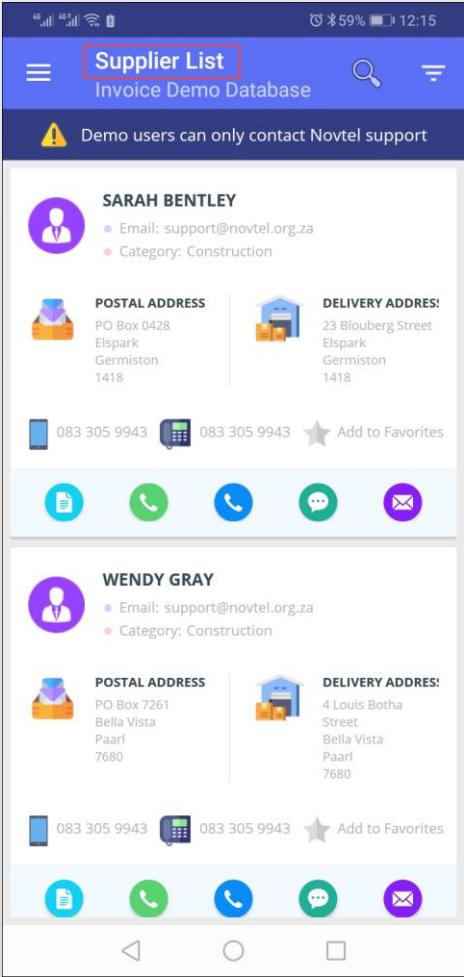
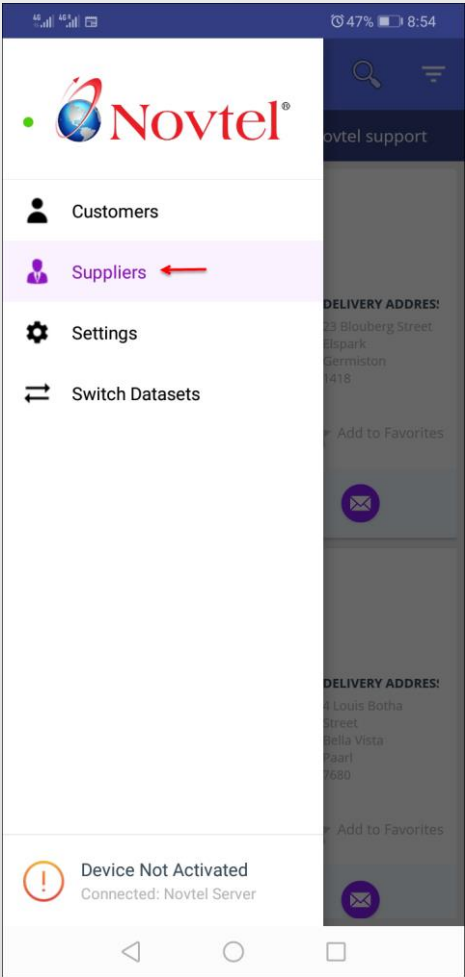
4

Suppliers





The exact same principles - as described for Customers - are also applied to your Suppliers.





However: Please note the following regarding Supplier Documents:

Integrated with Sage Pastel, the 'Supplier Invoice' field is a required field and cannot be left blank.

Attempting to update the Supplier Invoice, this message will be displayed.

For integration with Sage Evolution, the population of this field is not mandatory.

Supplier: Wendy Gray
Invoice Demo Database

NEW INVOICE

Delivery Address
4 Louis Botha Street
Bella Vista
Paarl
7680

Invoice Date
02 Jun 2021

Supplier Invoice
Enter invoice number

Postal Address

Sales Rep

Required Field

The supplier invoice field is required when interfaced to Pastel and cannot be empty.

OK

+ Item + Remark

Excl Total: R 608,70
Tax Total: R 91,30
Incl Total: R 700,00

Message
Enter message

Also Note:

Sales Reps are not applicable to Supplier Documents, and this field is deactivated.

Supplier: Wendy Gray
Invoice Demo Database

NEW INVOICE

Delivery Address
4 Louis Botha Street
Bella Vista
Paarl
7680

Invoice Date
02 Jun 2021

Supplier Invoice
Enter invoice number

Postal Address
PO Box 7261
Bella Vista
Paarl
7680

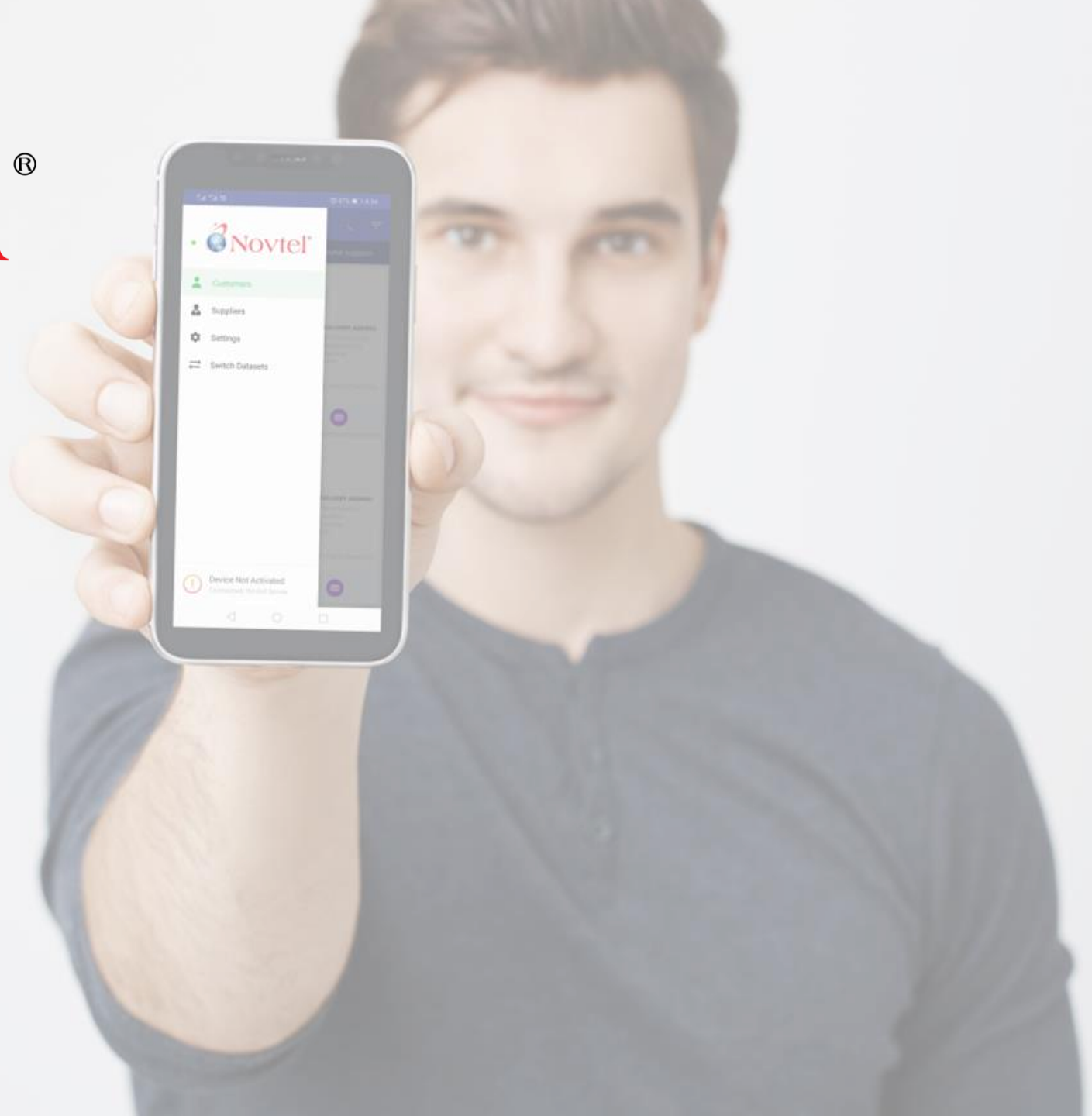
Sales Rep
Not applicable

Project
Select project



5

**Sage Evolution
Selling Prices**





Various labels for **Evolution** datasets have been changed to more closely represent terminology used in Sage Evolution.

Inventory stock quantity indicators shows the quantity on hand, on sales order and on purchase order for each inventory item and is visible while creating orders, credit notes and debit notes.

**Please note that the functionality described in this chapter,
is only available for datasets integrated with Sage Evolution!**



Sage Evolution Selling Prices

Pricelists can be set up and unique prices can be linked to an Inventory Item – based on the pricelists set up.

Only one selling price per pricelist option can be captured.

Edit Inventory Item "TST001"

Item Information Pricing Defaults Warehouse Incident History Images

Costs & Selling Prices

Manual Unit Cost ☐ Weighted Average
Last GRV Cost ☐ Latest Cost
Minimum GP % ☒ Manual Cost

Average Cost R3.15 Latest Cost R13.04
Highest Cost R13.04 Lowest Cost R0.00

Price List Name	Markup	Cost Method	Markup %	Currency	Exd Price	Ind Price
Pensioner Prices	<input type="checkbox"/>	Average			R434.78	R500.00
Staff Prices	<input type="checkbox"/>	Average			R173.91	R200.00
Standard Prices	<input type="checkbox"/>	Average			R869.57	R1 000.00

OK Cancel

Edit Customer "PET001"

Annuity Billing People Contracts Contact Management Incident History Inventory Items
Customer Tax Contact Details Bank & Other Credit Control Linked Accounts

Customer

Customer PET001

Name Peters, William James

Title Initials

Description

Group Ageing Period MNTH-INV (Monthly Date of I...
Area Terms Current
Rep Check Terms ☒
Credit Limit
Account Type ☒ Open Item Interest Rate %
☐ Balance Brought Forward Settlement Terms
Foreign Accounts Settlement Disc %
☐ Maintain Account in Foreign Currency Automatic Disc %
Foreign Currency Discount Matrix

Price List Name

Price List

OK Cancel

A default pricelist option can also be linked per Customer.

When creating documents for your Customers, Novtel will automatically use the prices linked to their selected pricelist.



When Warehouses are in use, you will be able to specify whether the Item's price, or unique prices per Warehouse is to be used – by ticking or unticking the 'Use Item Defaults' option.

Edit Inventory Item "TST001"

Item Information Pricing Defaults Warehouse Incident History Images

Add to Warehouse(s)... All None

Selected	Master	Warehouse	Name	Known As
<input checked="" type="checkbox"/>		CPT	Cape Town	
<input checked="" type="checkbox"/>		DBN	Durban	
<input checked="" type="checkbox"/>		JHB	Johannesburg	
<input checked="" type="checkbox"/>		Mstr	Master Warehouse	Master Warehouse

Pricing Information Ordering Defaults Suppliers

☒ Use Item Defaults Manual Unit Cost: R0.00 Defaults

Price List Name	Markup	Cost Method	Markup %	Currency	Exd Price	Ind Price	Ind Price / Gross
Pensioner Prices	<input type="checkbox"/>	Average					
Staff Prices	<input type="checkbox"/>	Average					
Standard Prices	<input type="checkbox"/>	Average					

OK Cancel

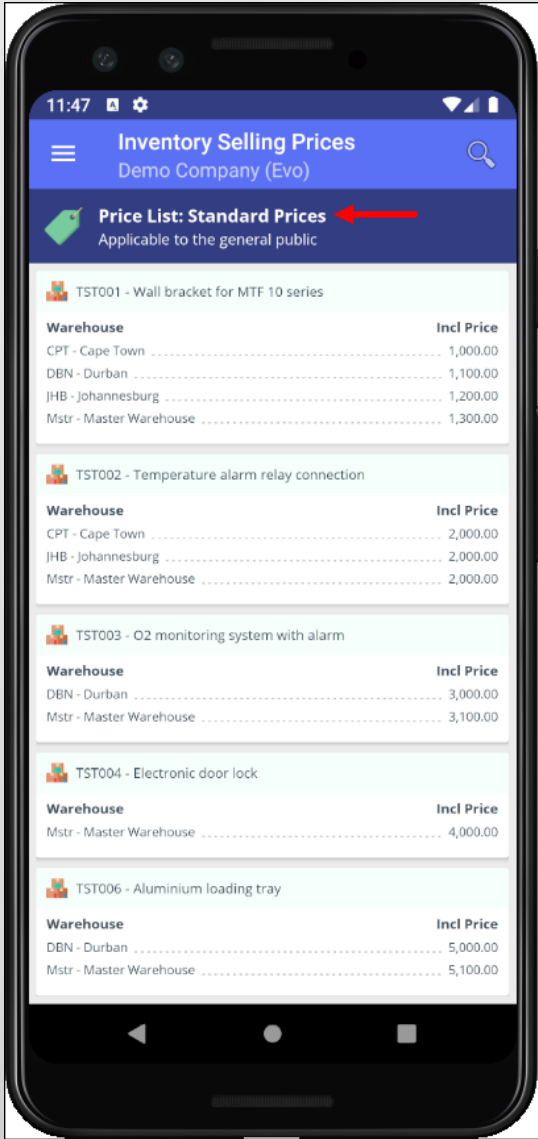
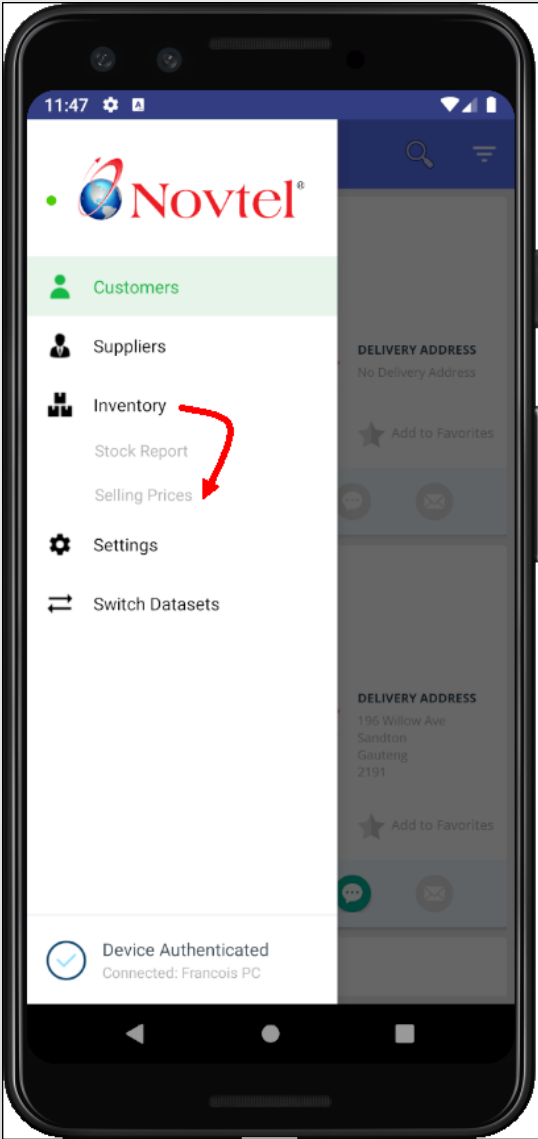
If the 'Use Item Defaults' option is ticked for a specific Warehouse, no prices can be entered at the bottom of the screen and the prices captured in the 'Pricing' tab, will automatically be used by Novtel.

If the 'Use Item Defaults' option is unticked for a specific Warehouse, custom Warehouse selling prices can be captured, and will be used by Novtel automatically.

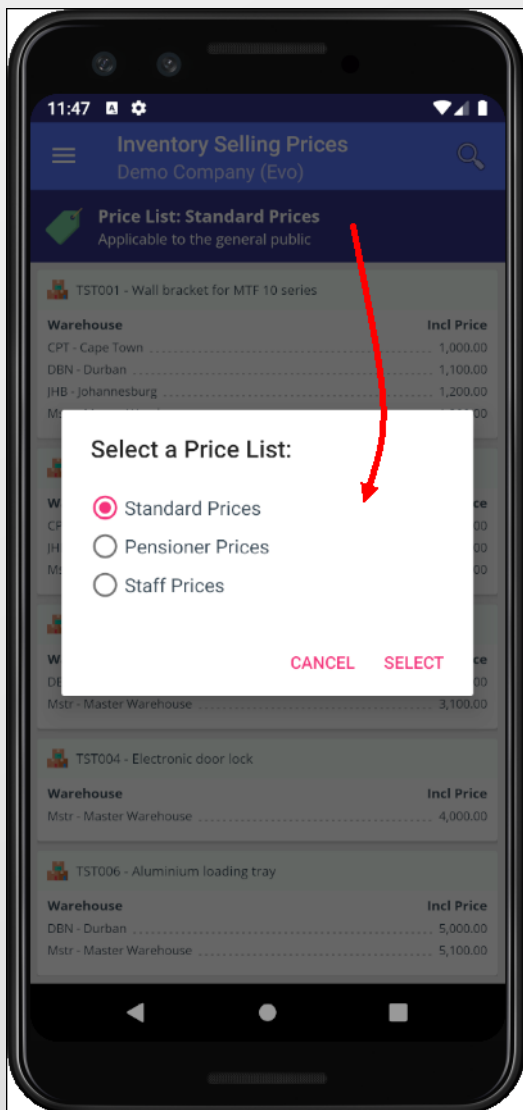


Price Lists and the Novtel App

When using an Evolution database set, the 'Selling Prices' option can be accessed under the 'Inventory' menu item.

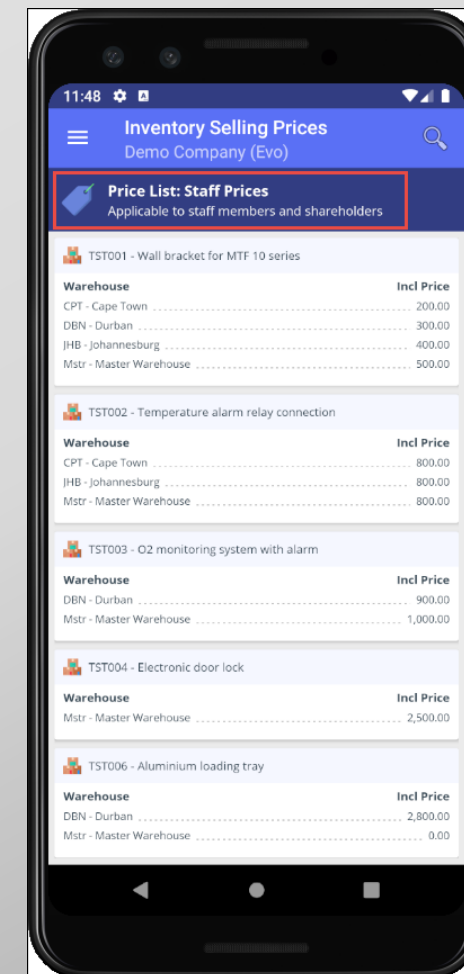
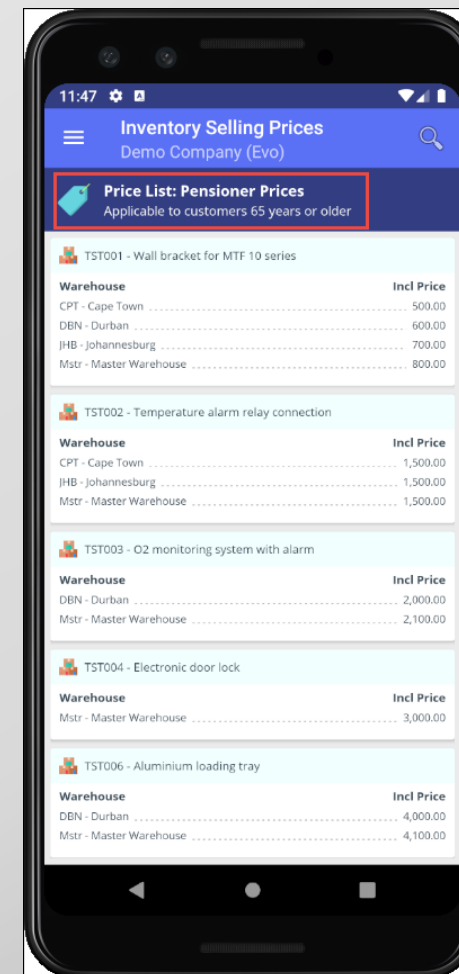
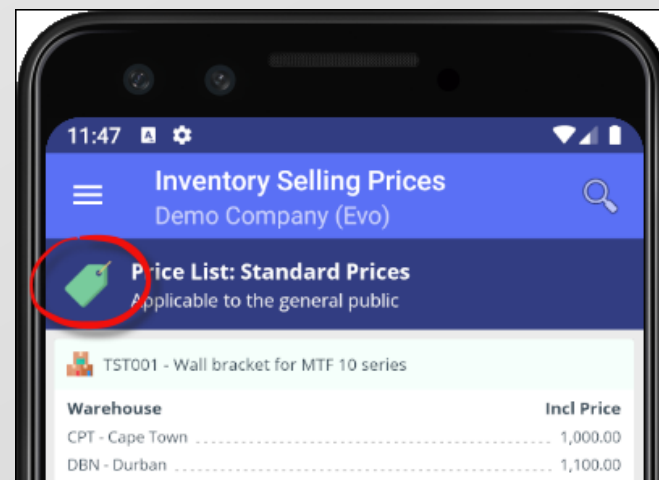


The selling prices per Inventory Item, and for the currently selected pricelist, are listed in this screen.



Tapping on the blue area, all created pricelist options are displayed, and the applicable option can be selected.

The pricelists are each allocated a unique colour tag, and a different colour will be displayed when selecting another pricelist.





Customer Selling Prices

When creating a new Sales Order (Invoice) and selecting the required inventory items from the applicable Warehouses, the default prices – as set on the Customer's Master File - are charged automatically.

11:49

Customer: Peters, William James
Demo Company (Evo)

NEW SALES ORDER

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Order Date
22 Sep 2021

External Order
Enter order number

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
Select sales rep

Project
Select project

Whse	Inventory	Tax %	Qty	Total Tax	Total Incl
CPT	TST001	15%	1	26.09	200.00
• Wall bracket for MTF 10 series					
DBN	TST001	15%	1	39.13	300.00
• Wall bracket for MTF 10 series					

Item **Remark** **Excl Total:** R 434.78
Tax Total: R 65.22
Incl Total: R 500.00

Message
Enter message

11:49

Customer: Peters, William James
Demo Company (Evo)

NEW SALES ORDER

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Order Date
22 Sep 2021

External Order
Enter order number

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
Select sales rep

Project
Select project

Whse	Inventory	Tax %	Qty	Total Tax	Total Incl
CPT	TST001	15%	1	26.09	200.00
• Wall bracket for MTF 10 series					
DBN	TST001	15%	3	117.39	900.00
• Wall bracket for MTF 10 series					

Item **Remark** **Excl Total:** R 956.52
Tax Total: R 143.48
Incl Total: R 1,100.00

Message
Enter message

Changing the quantity of an Item, Novtel will multiply the unit price and calculate the total accordingly.



11:49

Customer: Peters, William James
Demo Company (Evo)

NEW SALES ORDER

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Order Date
22 Sep 2021

External Order
Enter order number

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
Select sales rep

Project
Select project

Whse	Inventory	Tax %	Qty	Total Tax	Total Incl
CPT	TST001	15%	1	26.09	200.00
Wall bracket for MTF 10 series					
DBN	TST001	15%	3	117.39	900.00
Wall bracket for MTF 10 series					

Excl Total: R 956.52
Tax Total: R 143.48
Incl Total: R 1,100.00

Message
Enter message

Should you wish to use a pricelist other than the one selected on the Customer's Master File, simply tap and hold the line item's 'Total Including' amount.



11:49

Select Selling Price
Demo Company (Evo)

Warehouse: DBN | Inventory Item: TST001

Standard Prices
• Applicable to the general public
• Inclusive Price: 1,100.00

Pensioner Prices
• Applicable to customers 65 years or older
• Inclusive Price: 600.00

Staff Prices
• Applicable to staff members and shareholders
• Inclusive Price: 300.00

The required Pricelist for this Item and Warehouse, can now be selected from the list.



The newly selected pricelist has been applied to this line item, and the quantity previously set, has been taken into consideration.



11:49

Customer: Peters, William James
Demo Company (Evo)

NEW SALES ORDER

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

Order Date
22 Sep 2021

External Order
Enter order number

Postal Address
P.O. Box 23929
Pretoria Central
Pretoria
0002

Sales Rep
Select sales rep

Project
Select project

Whse	Inventory	Tax %	Qty	Total Tax	Total Incl
CPT	TST001	15%	1	26.09	200.00
Wall bracket for MTF 10 series					
DBN	TST001	15%	3	430.43	3,300.00
Wall bracket for MTF 10 series					

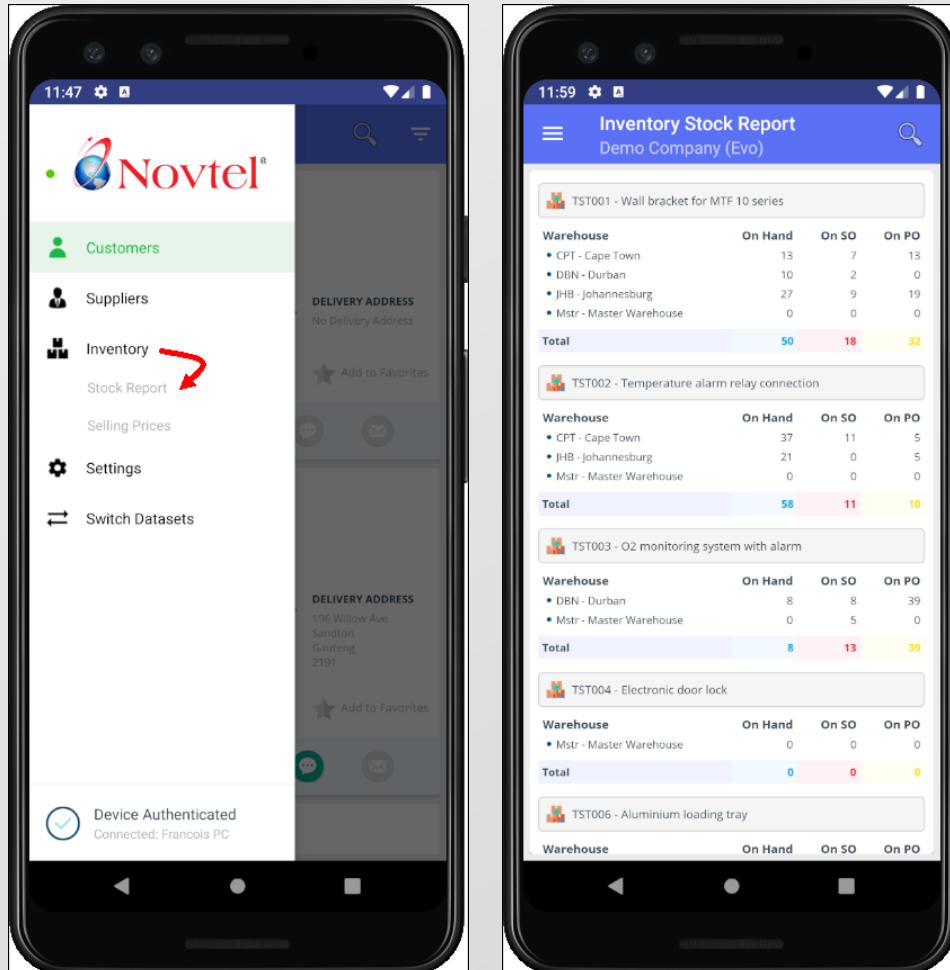
Excl Total: R 3,043.48
Tax Total: R 456.52
Incl Total: R 3,500.00

Message
Enter message



The Inventory Stock Report

The Inventory -> Stock Report menu item provides a summary of stock quantities across all warehouses.



Qty On Hand

This is the actual stock available per Warehouse.

Qty on Sales Order (SO)

Reserved stock quantity in Evolution. The Sales Orders has been saved only, and not yet processed.

Qty on Purchase Order (PO)

Reserved stock quantity in Evolution. The Purchase Order has been saved only, and not yet processed.

Only once Sales and Purchase Orders have been processed, will the 'On Hand' quantity be influenced.



Property
Management



Hospitality Management



Novtel
Equipment Hire



Relations
Management



Novtel
Self-Storage



Novtel
Vehicle Hire



The Invoice Module
and Job Tracker Utility
(For the Glass Cutting Industry)



Contract
Management



Novtel
Bank Manager



Novtel
Access Control



Property Management
Mobile Application

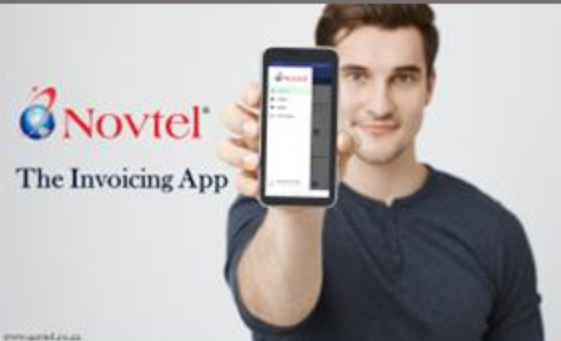
For Recording Maintenance
Onsite and In your Time



Relations Management Mobile App



The Invoicing App



The Online
Application
Website



info@novtel.com

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www.novtel.co.za



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