Novtel®

The Invoicing App

INDEX

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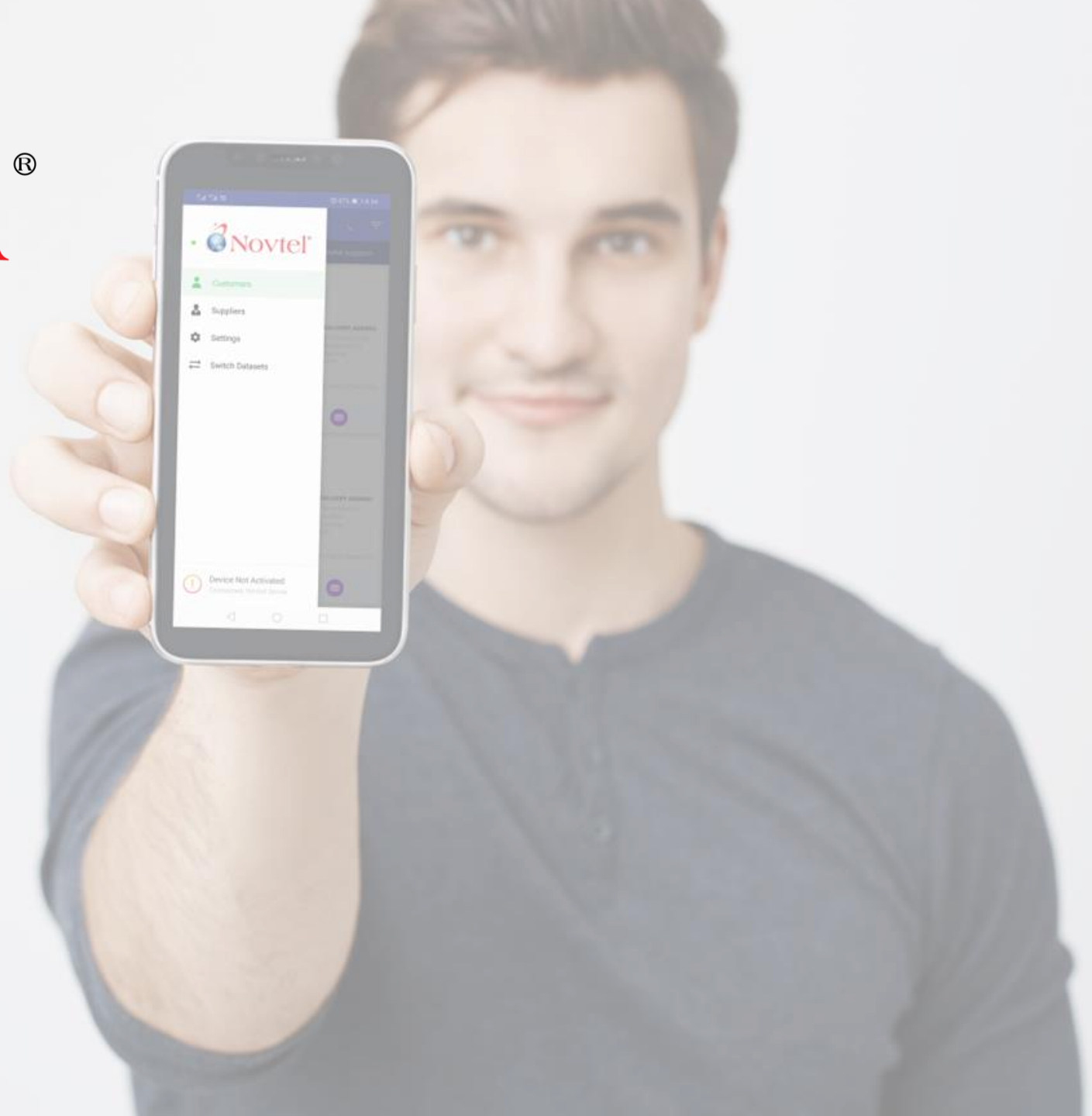
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Introduction

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
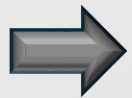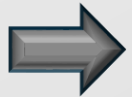test all features on the demo Pastel dataset

-

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.
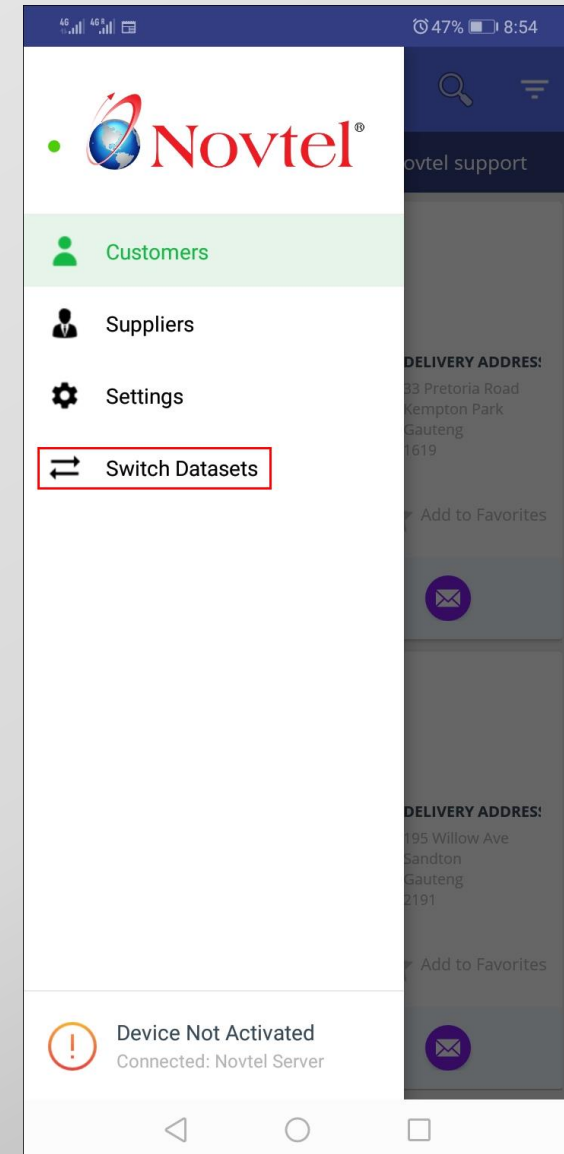
The Novtel Invoicing app supports any number of:

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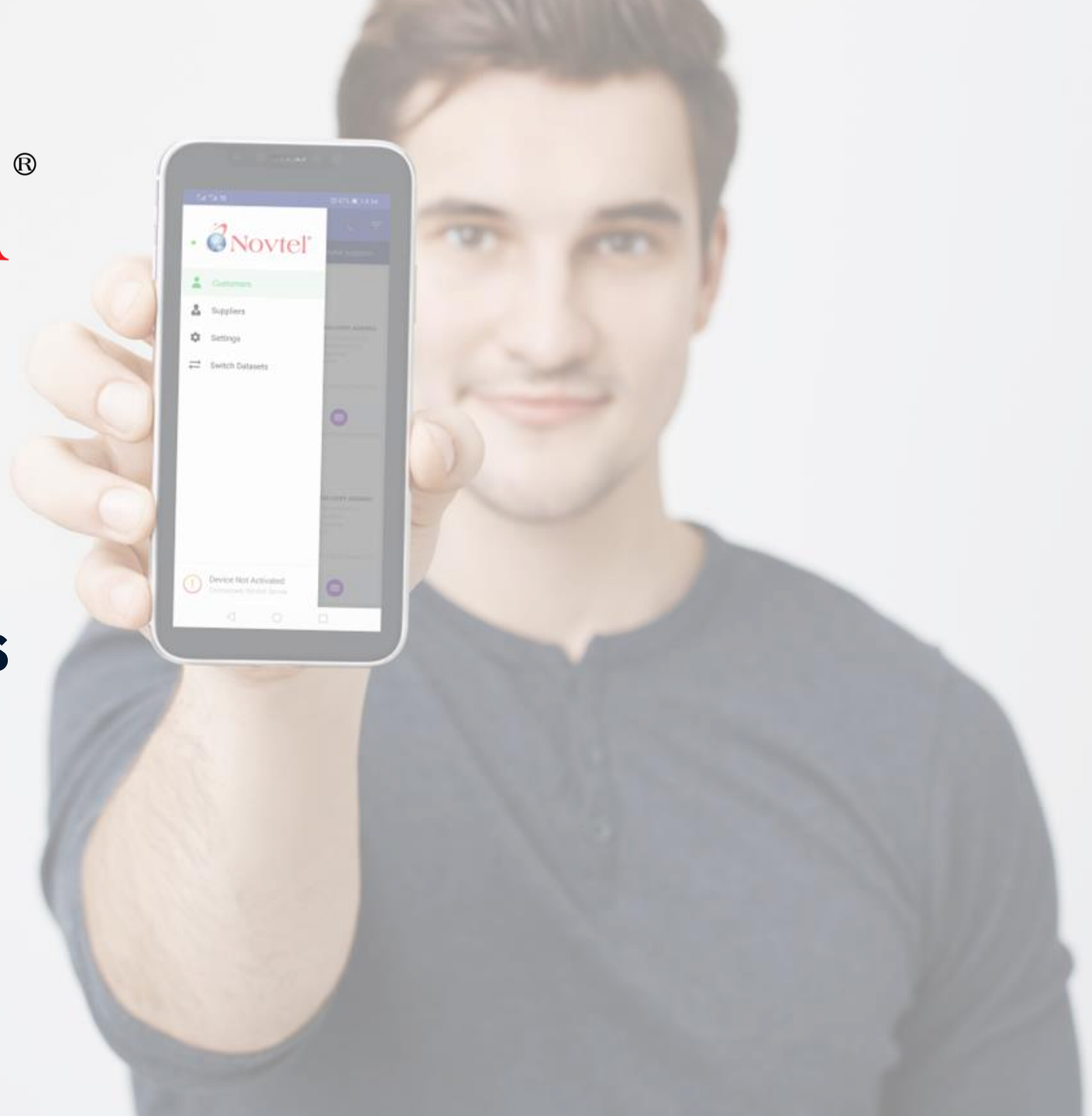
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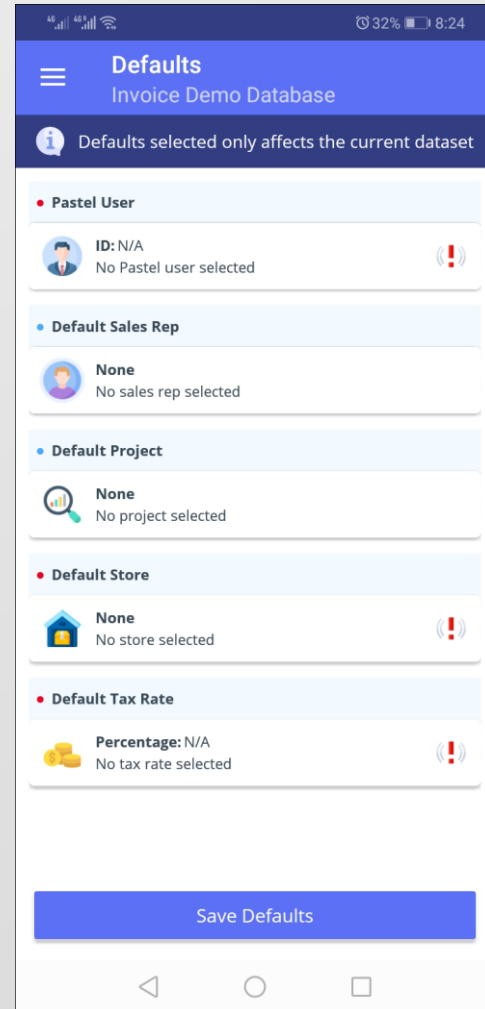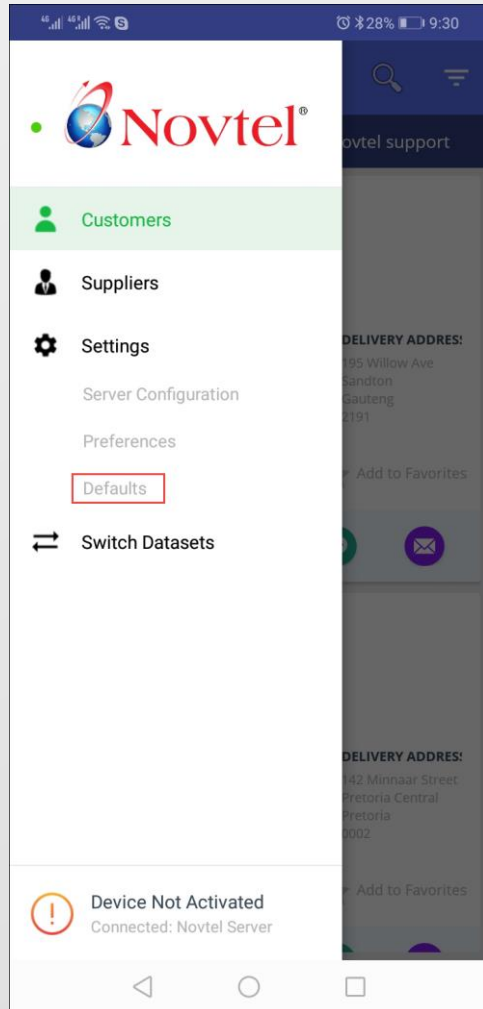PROVIDED that the device is activated and set up by Novtel Support

The Default Settings

2

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

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.
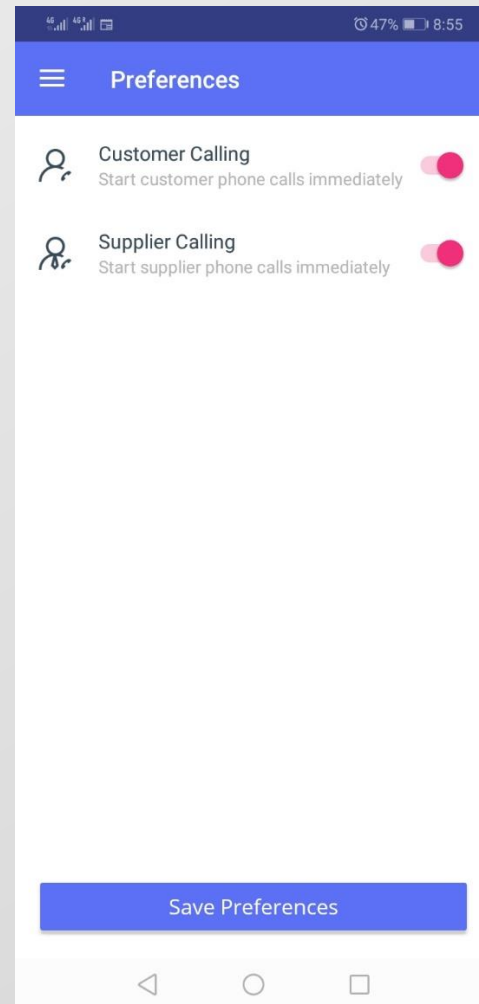

The set defaults will now automatically be linked to the documents to be processed but can be changed on the document form - if necessary.
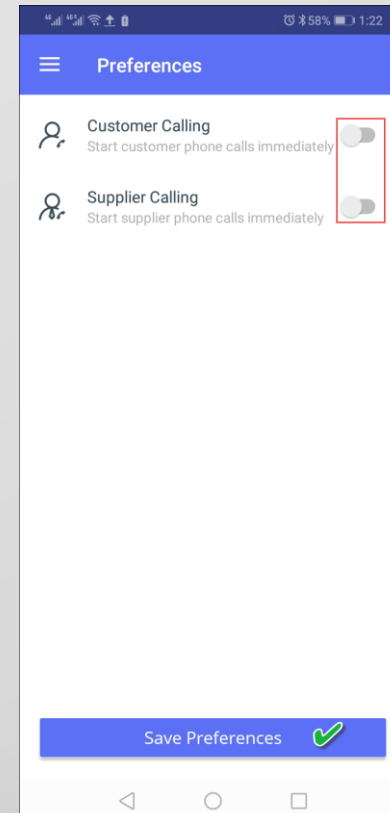
Customer and Supplier Calling Preferences
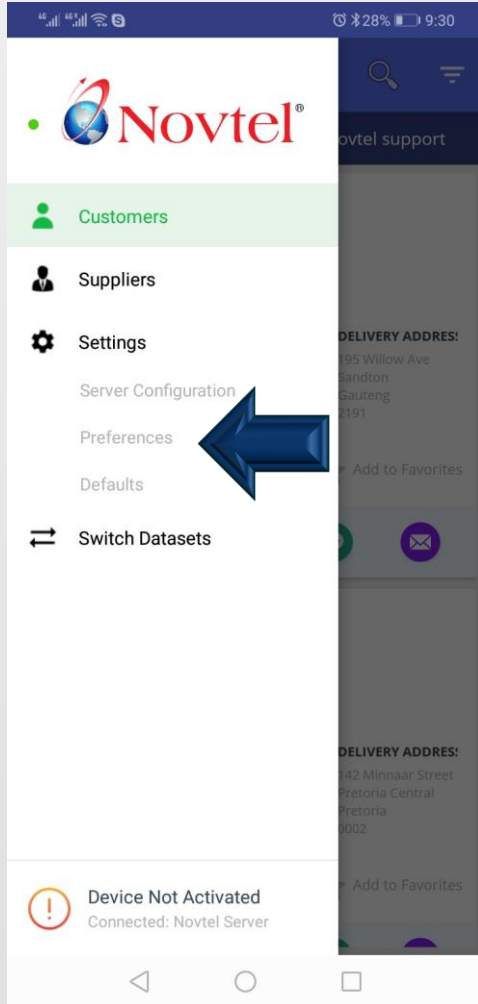
Under the 'Settings' menu option, both demo and client Users will be able to access the 'Preferences' option.

By default, the options are activated to 'Start Customer or Supplier Phone Calls Immediately' when tapping the 'Call' button.
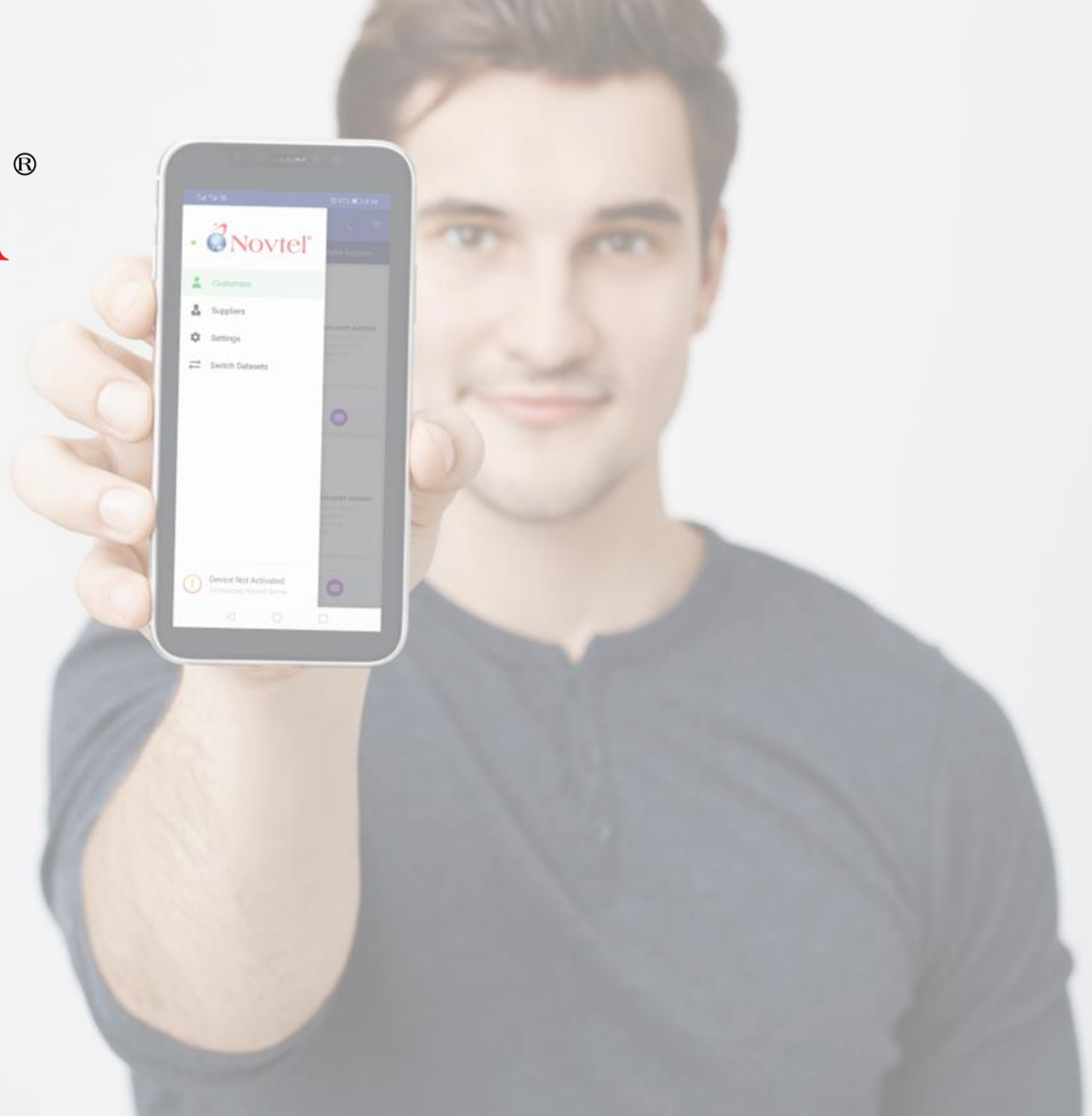
However:
Should you wish to deactivate the option and save the preference, the number will be opened in the dialler screen, and from there the 'call' button can be tapped.
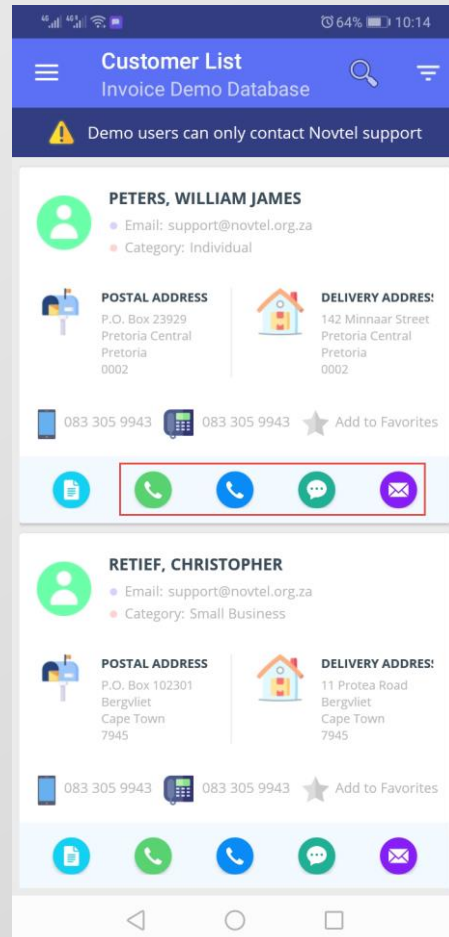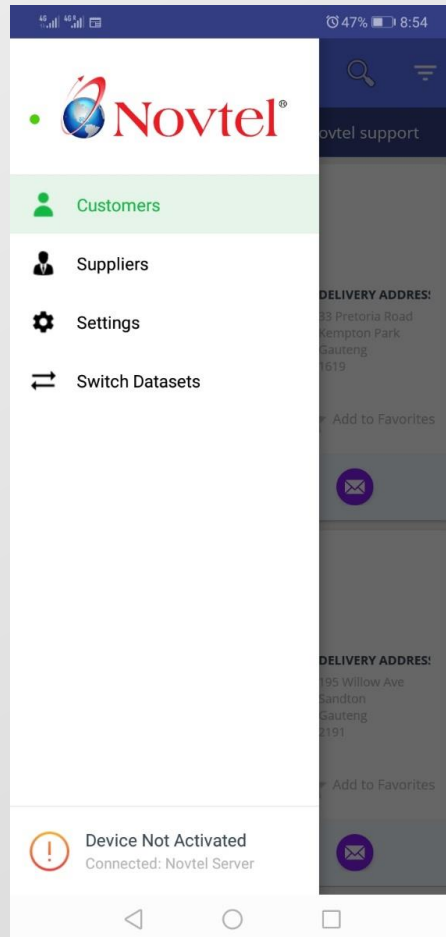
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Customers

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:
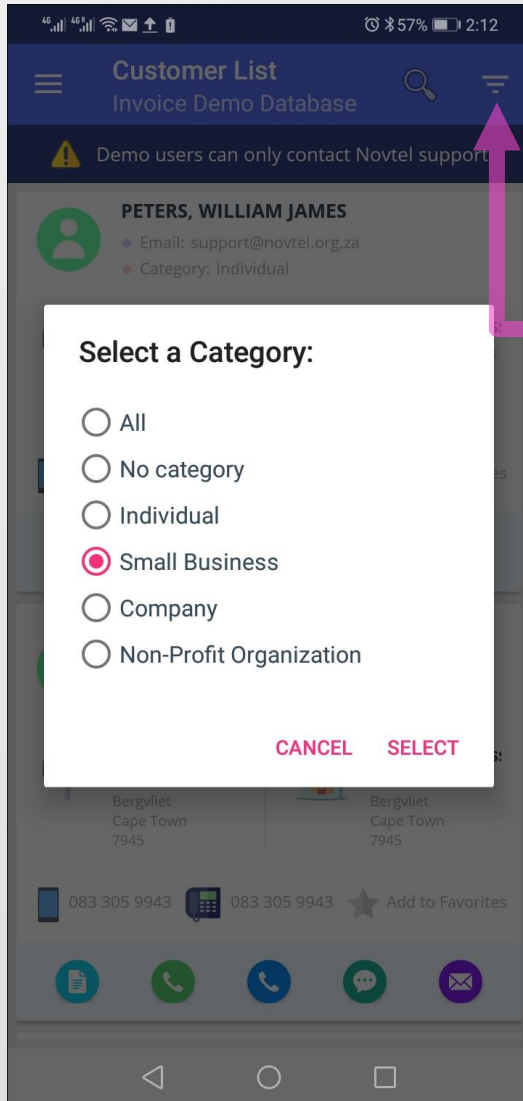
Call via Cell or Landline Number

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'.
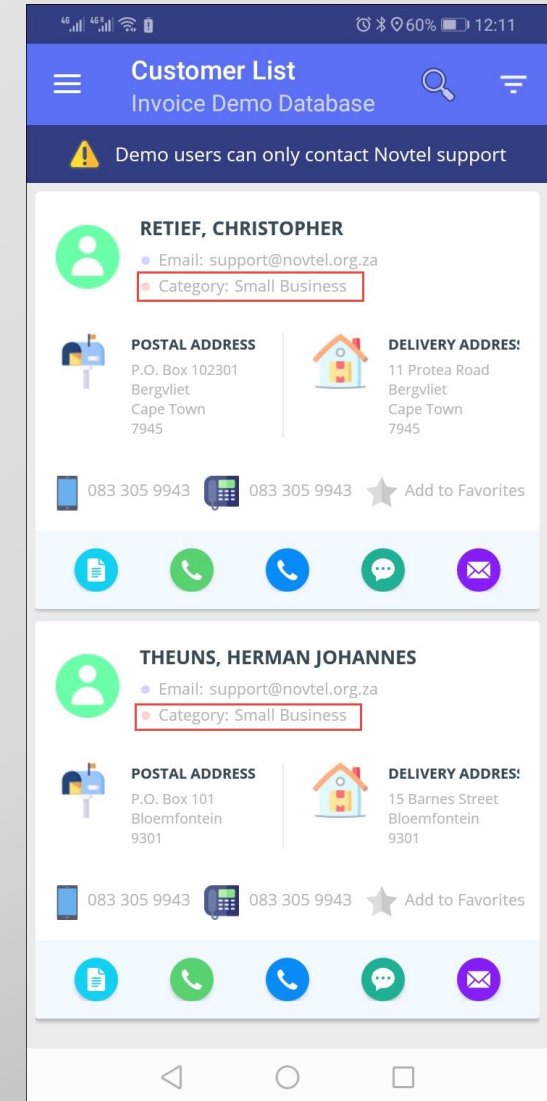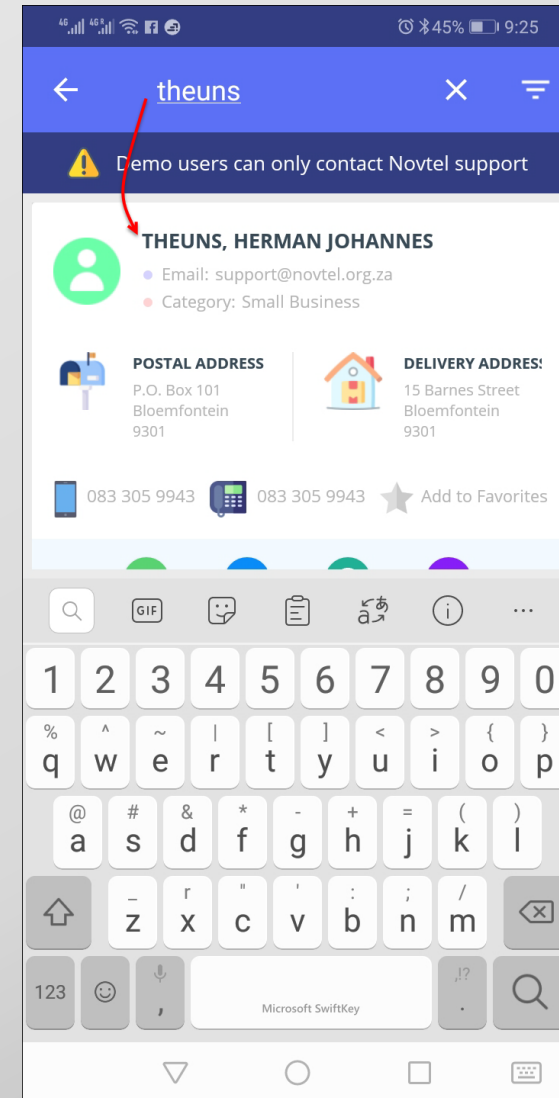
Searching for a Specific Customer

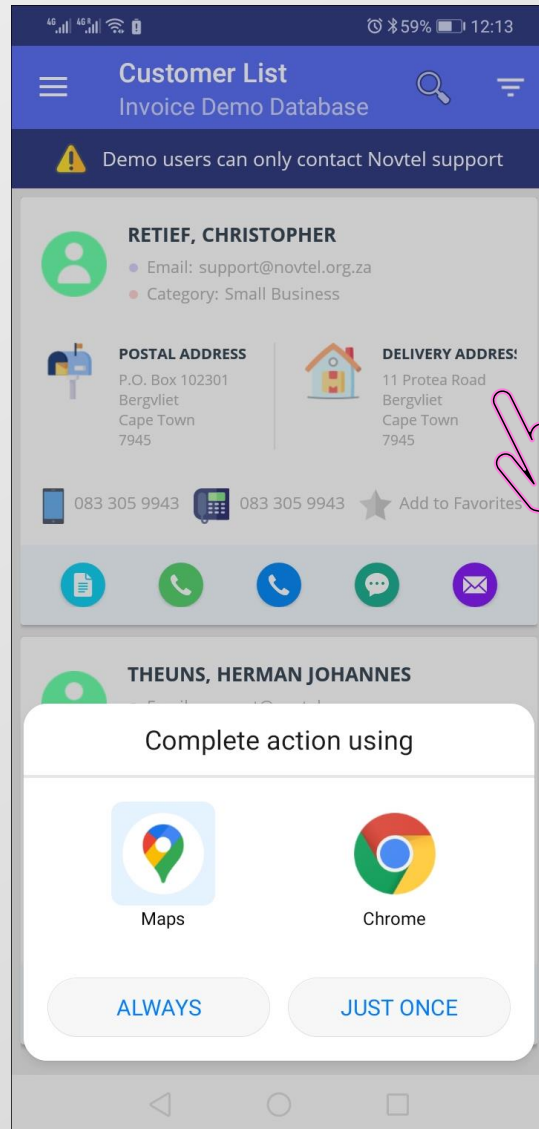A specific Customer can also be searched for by clicking on the search option here.
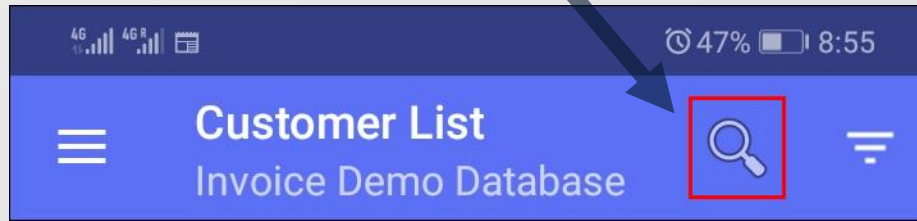
Simply type the Customer's description, or part thereof, and Novtel will match the criteria when found.

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

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

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

Credit Note Documents are displayed in green.
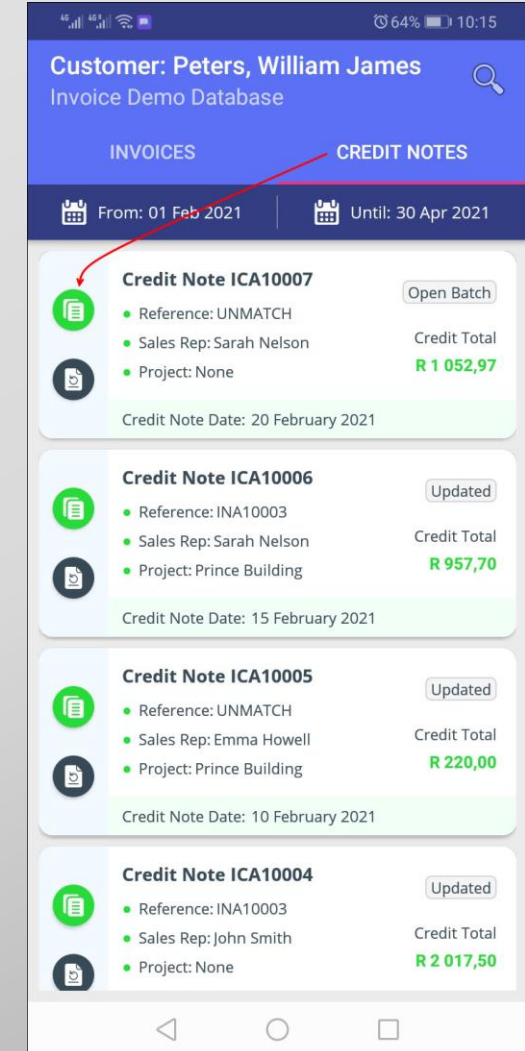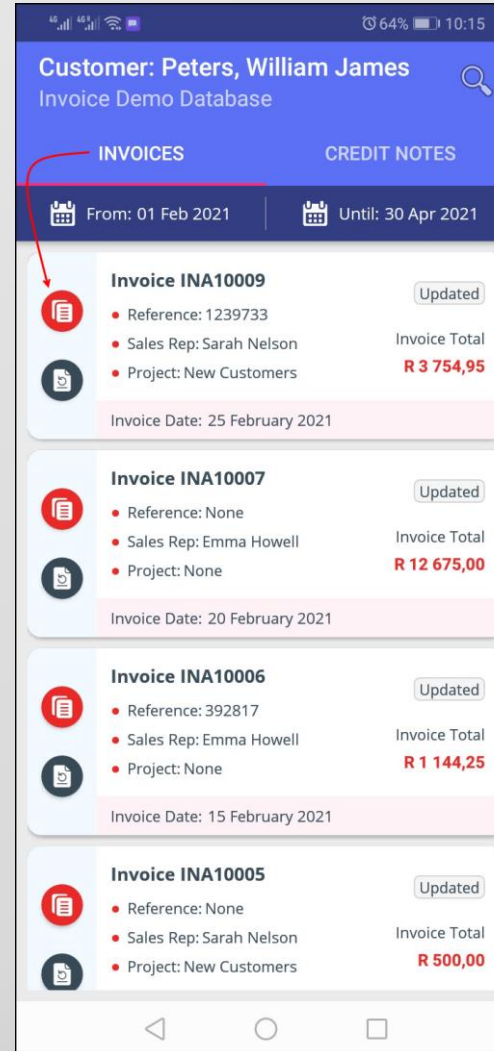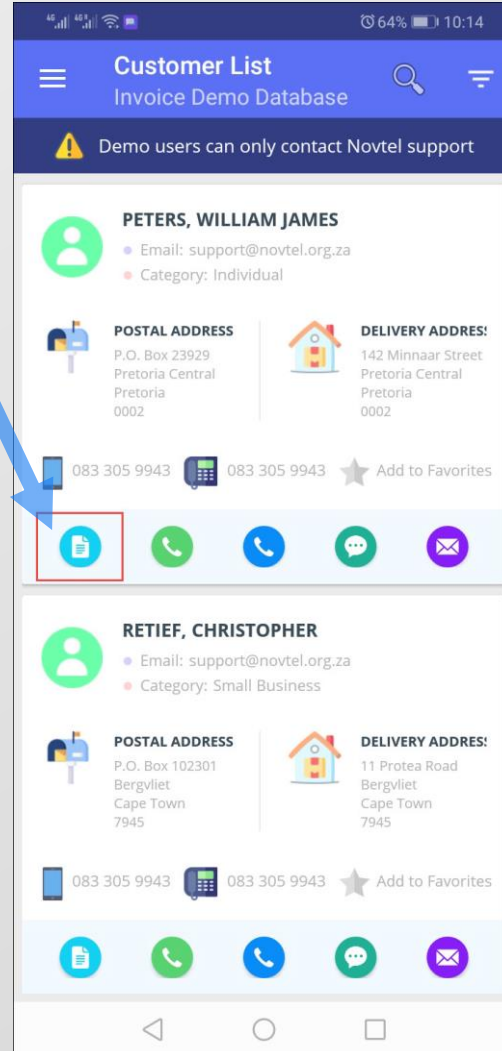
By tapping on the date options, the calendar will open, and the required date range to be viewed can be selected, respectively.
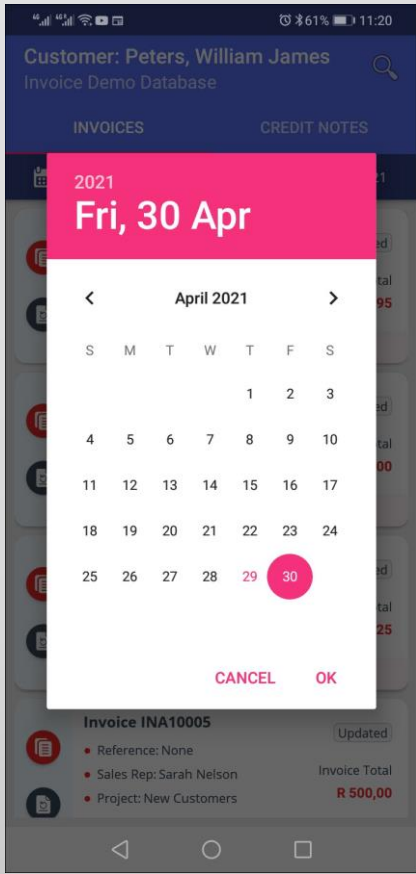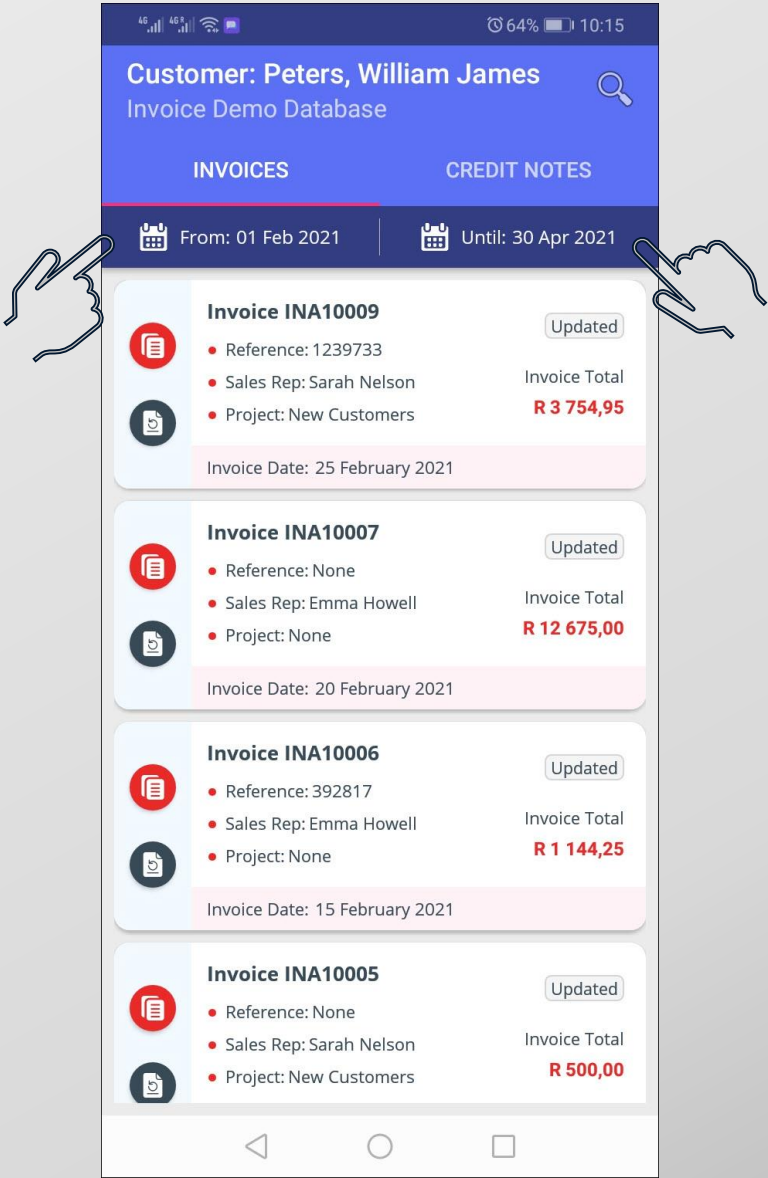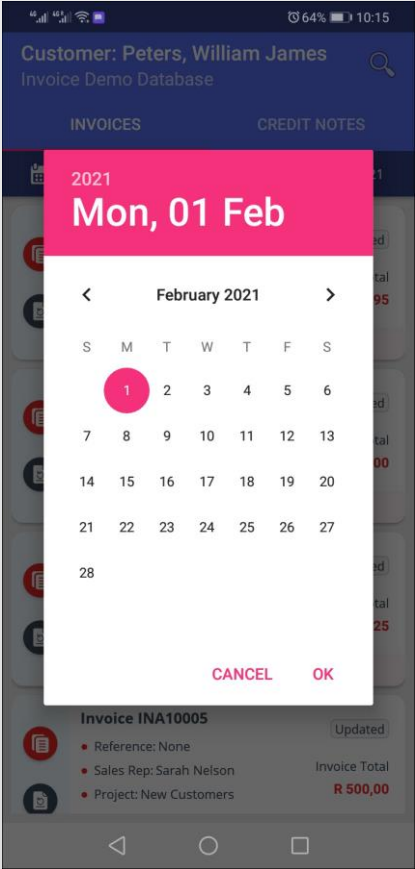
To view the details of a specific document, simply select the document option first, and tap anywhere in the required document's field – except for on the buttons itself.

Creating Customer Documents

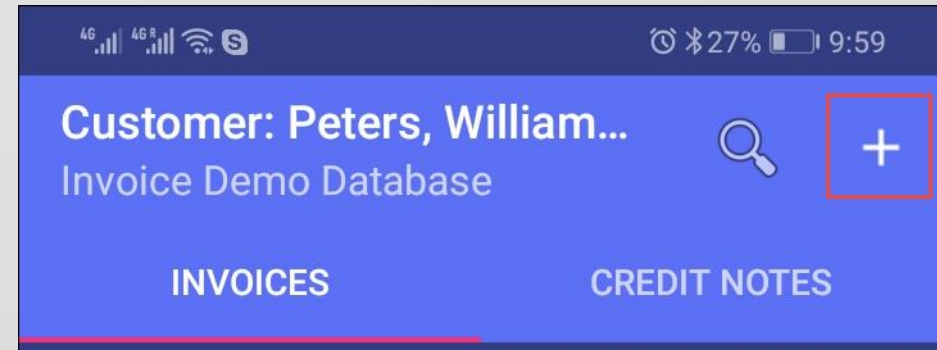To create an Invoice, the option is selected and the + sign tapped. Alternatively, select the 'Credit Note' option and tap the + sign

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

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

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

Left Screen

Customer: Peters, William James
Invoice Demo Database

NEW INVOICE

Delivery Address
142 Minnaar Street
Pretoria Central
Pretoria
0002

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

Invoice Date
02 Jun 2021

Reference
Enter reference

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

Right Screen

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

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.

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

Enter remarks by tapping this option

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.

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

Crediting an entire Document

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.

Crediting Specific Items

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

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.
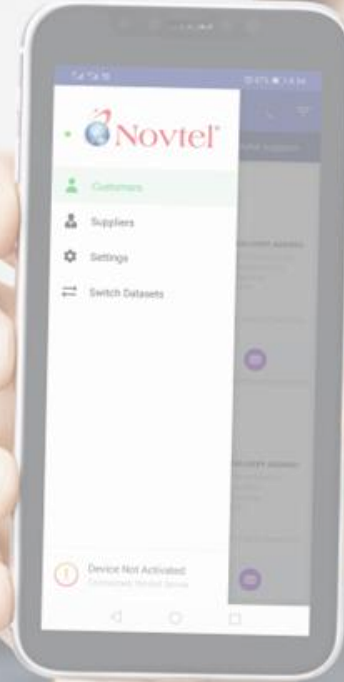

All details linked to the copied document will be entered here, but with the current date, and is indicated as a new document.

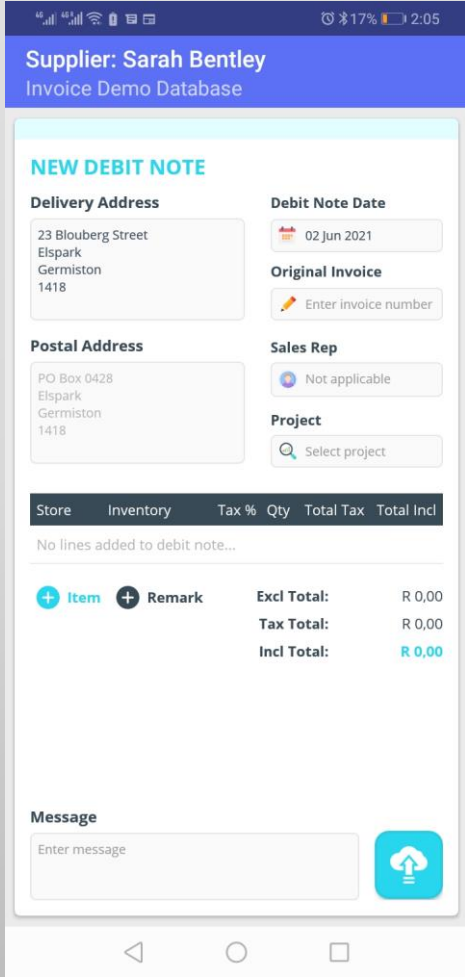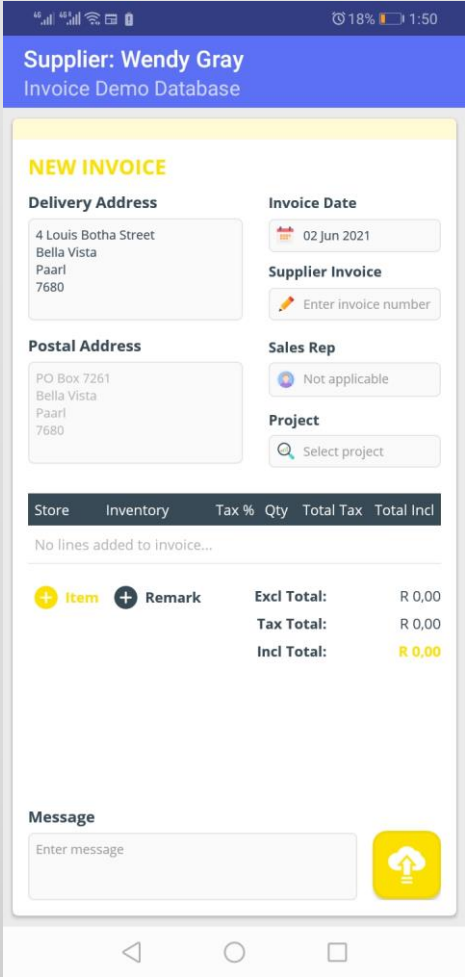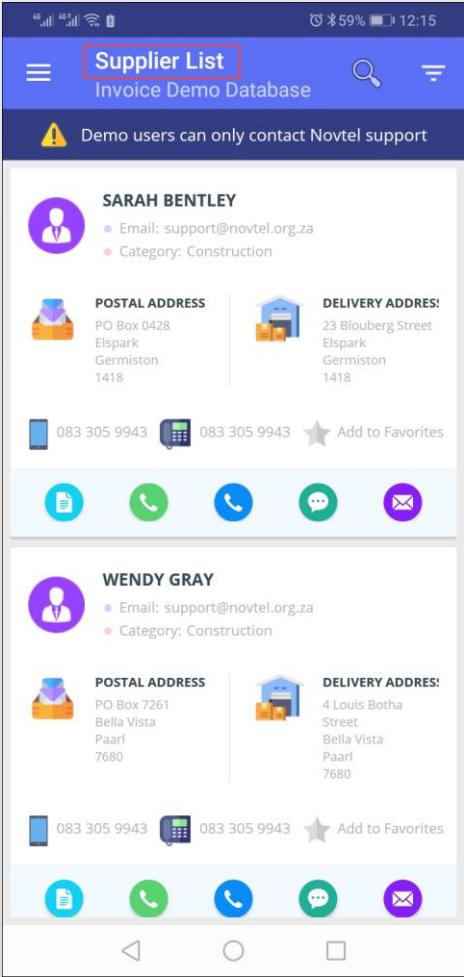Changes can be made to the template and when done, it can be submitted.
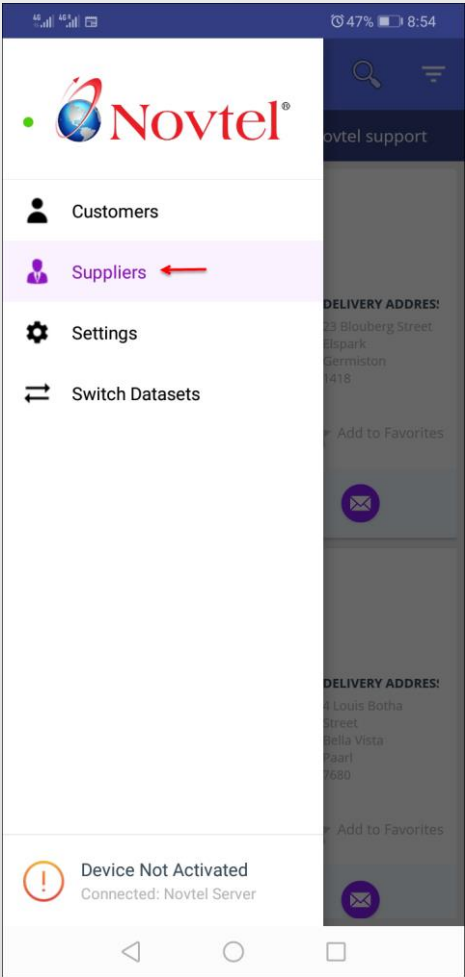
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Suppliers

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.

Also Note:

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

Sage Evolution Selling Prices

5
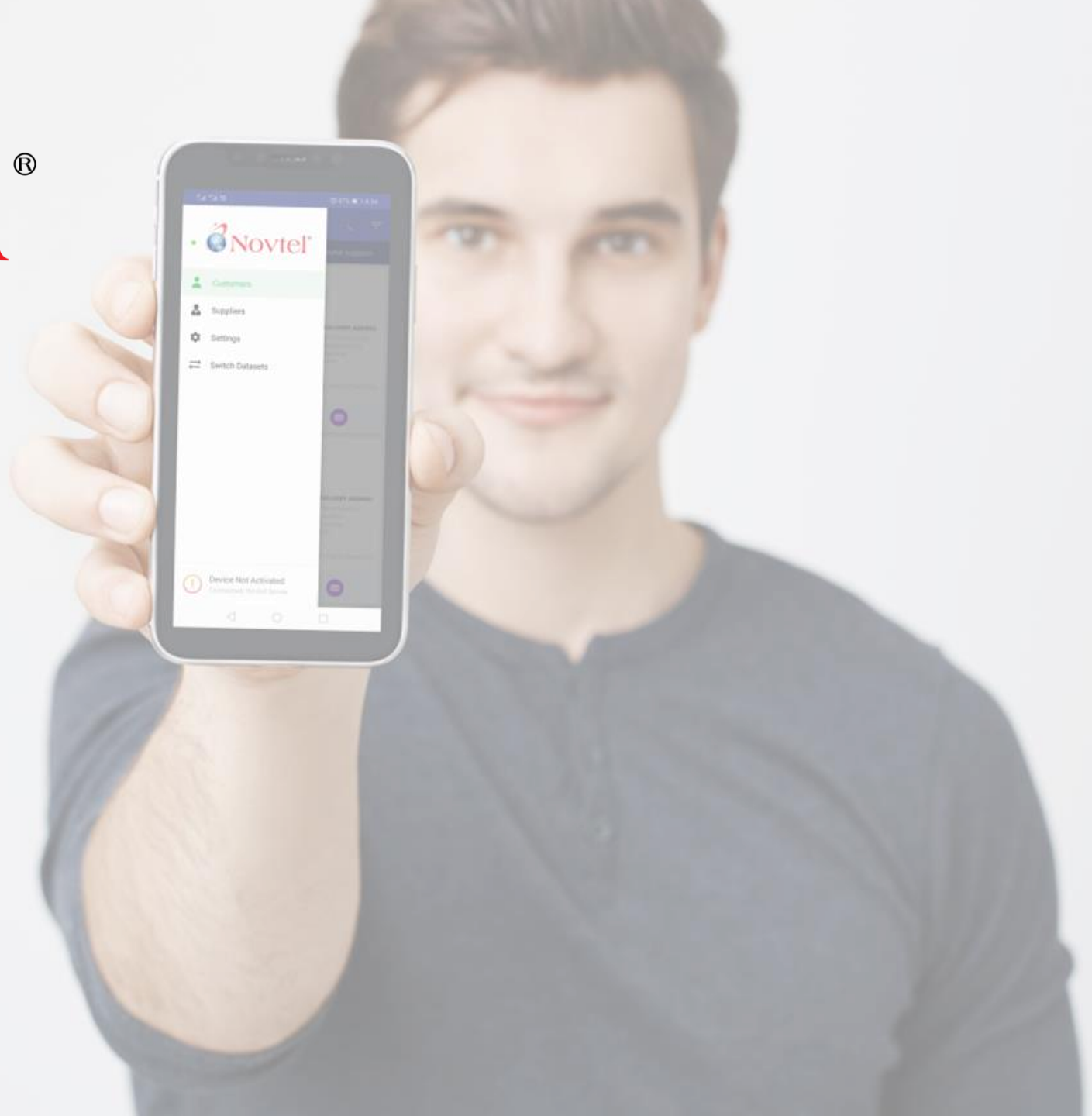
Various labels for **Evolution** datasets have been changed to more closely represent terminology used in Sage Evolution.

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.

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.


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.
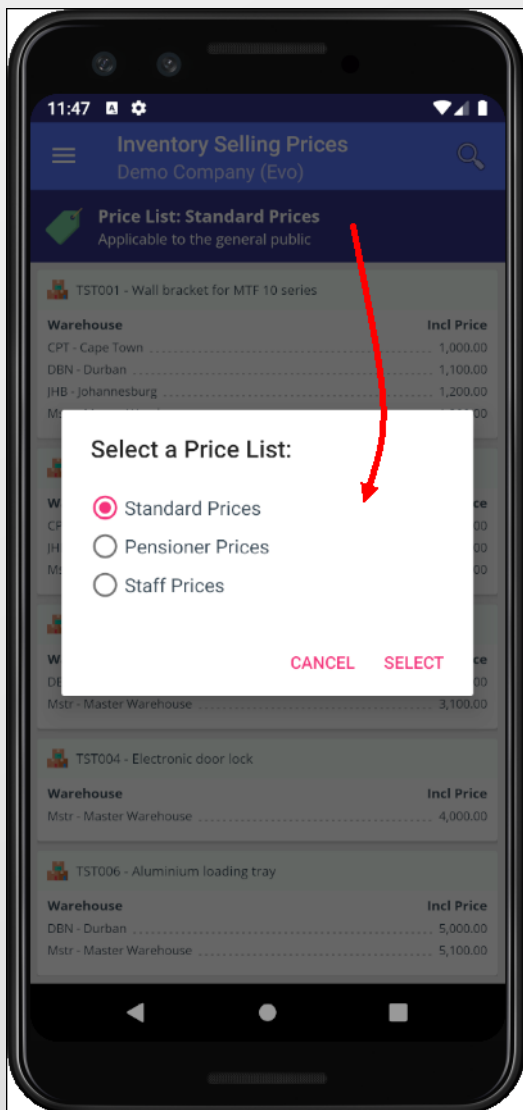
Price Lists and the Novtel App

When using an Evolution database set, the 'Selling Prices' option can be accessed under the 'Inventory' menu item.
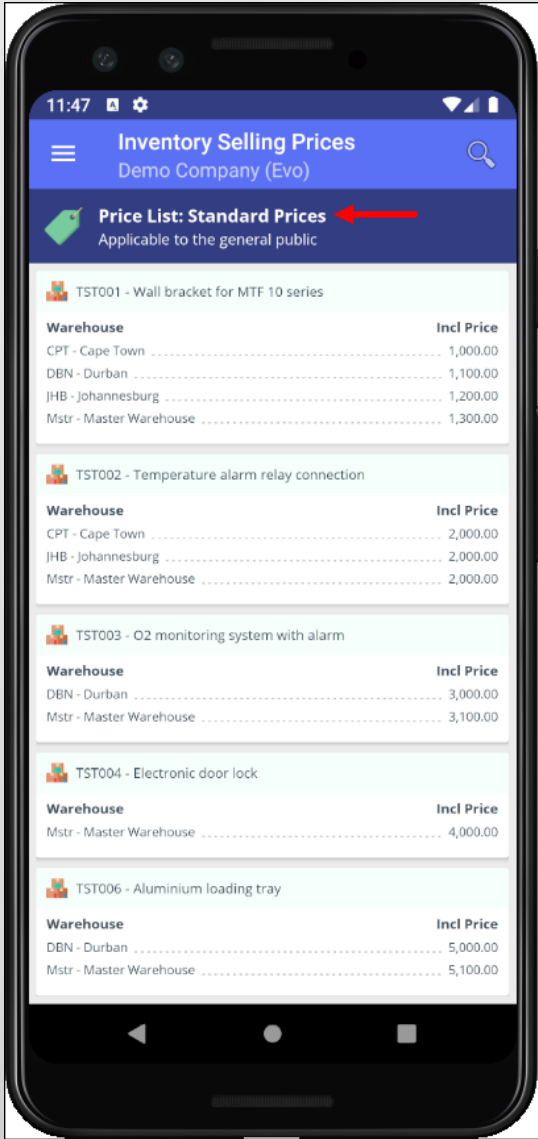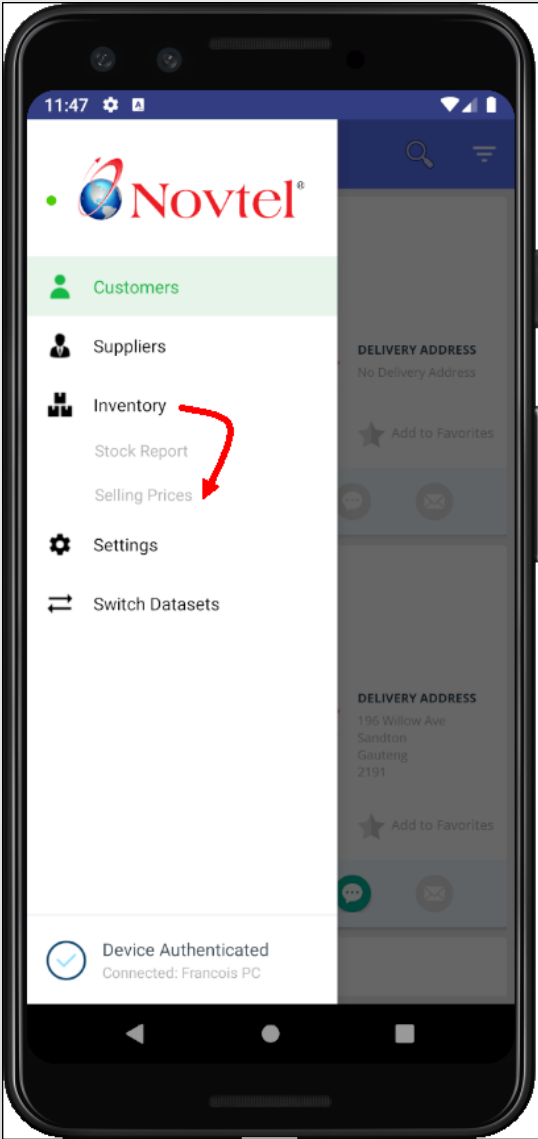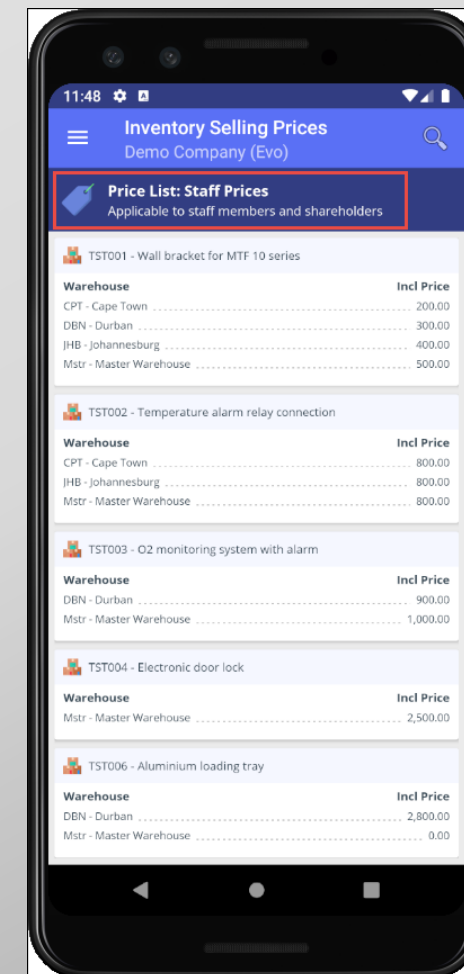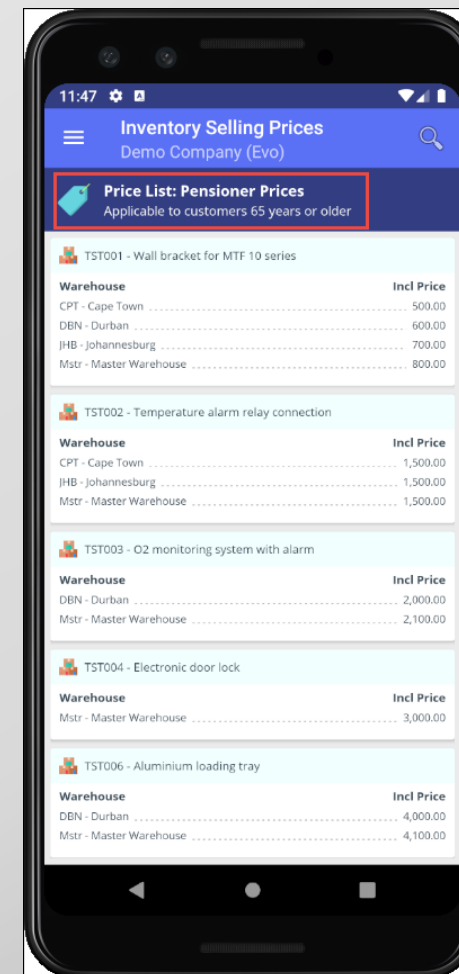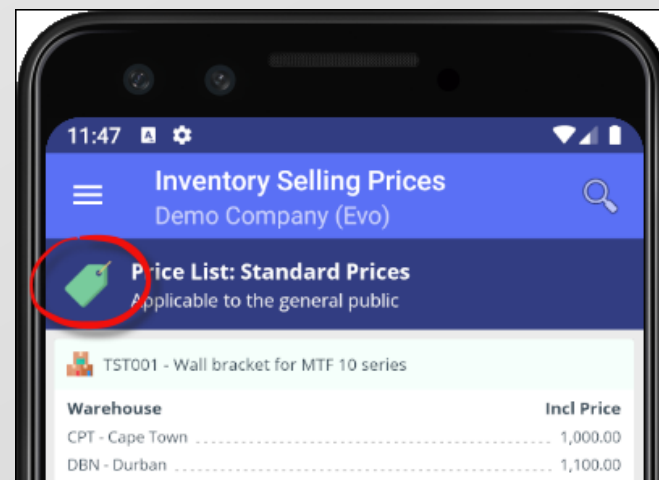
The selling prices per Inventory Item, and for the currently selected pricelist, are listed in this screen.

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.

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

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.

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.

The Inventory Stock Report

The Inventory -> Stock Report menu item provides a summary of stock quantities across all warehouses.
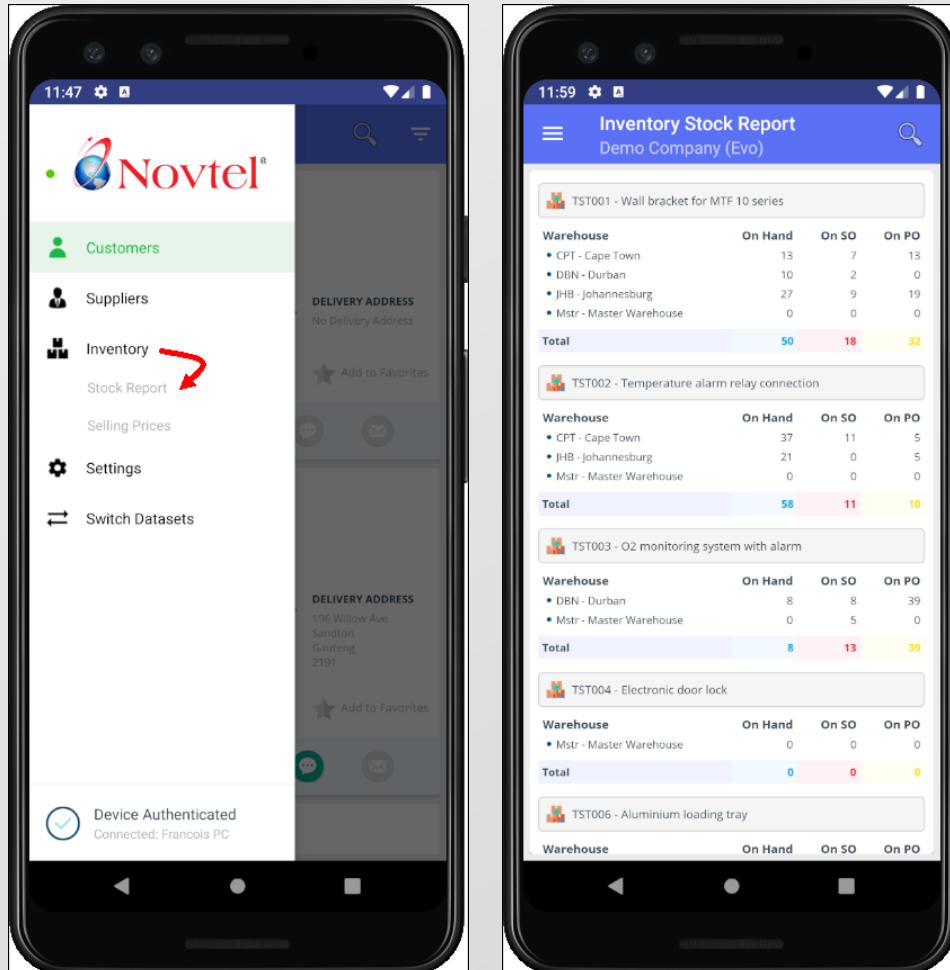
Qty On Hand
This is the actual stock available per Warehouse.

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.

Novtel Property Management

Novtel Hospitality Management

Novtel Equipment Hire

Novtel Relations Management

Novtel Self-Storage

Novtel Vehicle Hire

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

Novtel Contract Management

Novtel Bank Manager

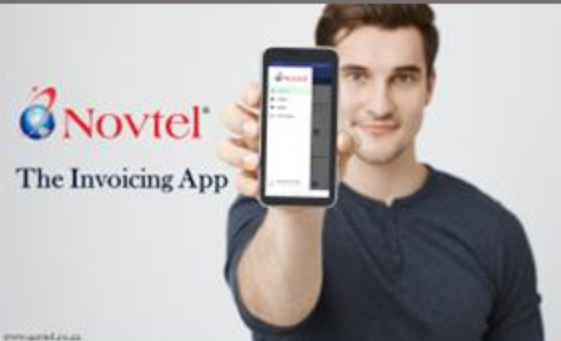Novtel Access Control

Novtel Property Management Mobile Application — For Recording Maintenance Onsite and in real time

Novtel Relations Management Mobile App

Novtel The Invoicing App

Novtel The Online Application Website

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