
Novtel®
Relations Management
www.novtel.co.za

Novtel® Relations Management

The Basics of Novtel Relations Management

 V7

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1

Introduction

Introduction

With this product, Novtel will help any organisation take control of its communication and interaction activities as it occurs.

Novtel Relations Management Software was designed with the intent of:

- ✓ Managing communication between your company and its Clients, Suppliers; Prospective Clients and Employees.

  By means of e-mail, SMS, notes and instructions, you are able to build a communication history and track-record in one central system.
- ✓ Complete and incomplete tasks can be tracked; a task history is obtained; and the auto reminder and flagging functions will assist in keeping tasks organised.
- ✓ This product has powerful filtering capabilities, allowing you to group customers, suppliers, and prospects - customized according to your company’s needs.
- ✓ Novtel Relations Management Software is a valuable tool for sending bulk SMS's or e-mails to specific groups.
- ✓ When the full version is purchased, there will be no restriction on the following:
  - ➢ The number of concurrent Users (Local or Network)
  - ➢ Backing Up and Restoring Data
  - ➢ Transferring Data to Another PC
  - ➢ The number of Novtel and Pastel Databases

Introduction

Novtel Relations Management integrates with:

- ✓ Sage Pastel Partner and Xpress
- ✓ Sage Evolution
- ✓ Microsoft Office (Word; Excel; Access; SQL and Outlook)
- ✓ Novtel Access Control
- ✓ Novtel Property Management
- ✓ Novtel Hospitality Management
- ✓ Novtel Vehicle Hire
- ✓ Novtel Self Storage
- ✓ Novtel Equipment Hire

Introduction

Please note that for demonstration purposes, our Company integrates with Sage Pastel Partner.

Also note that the purpose of this document is to discuss the basics of Relations Management, and more detailed manuals are available on each subject discussed here, and MUCH more.

Relations Management

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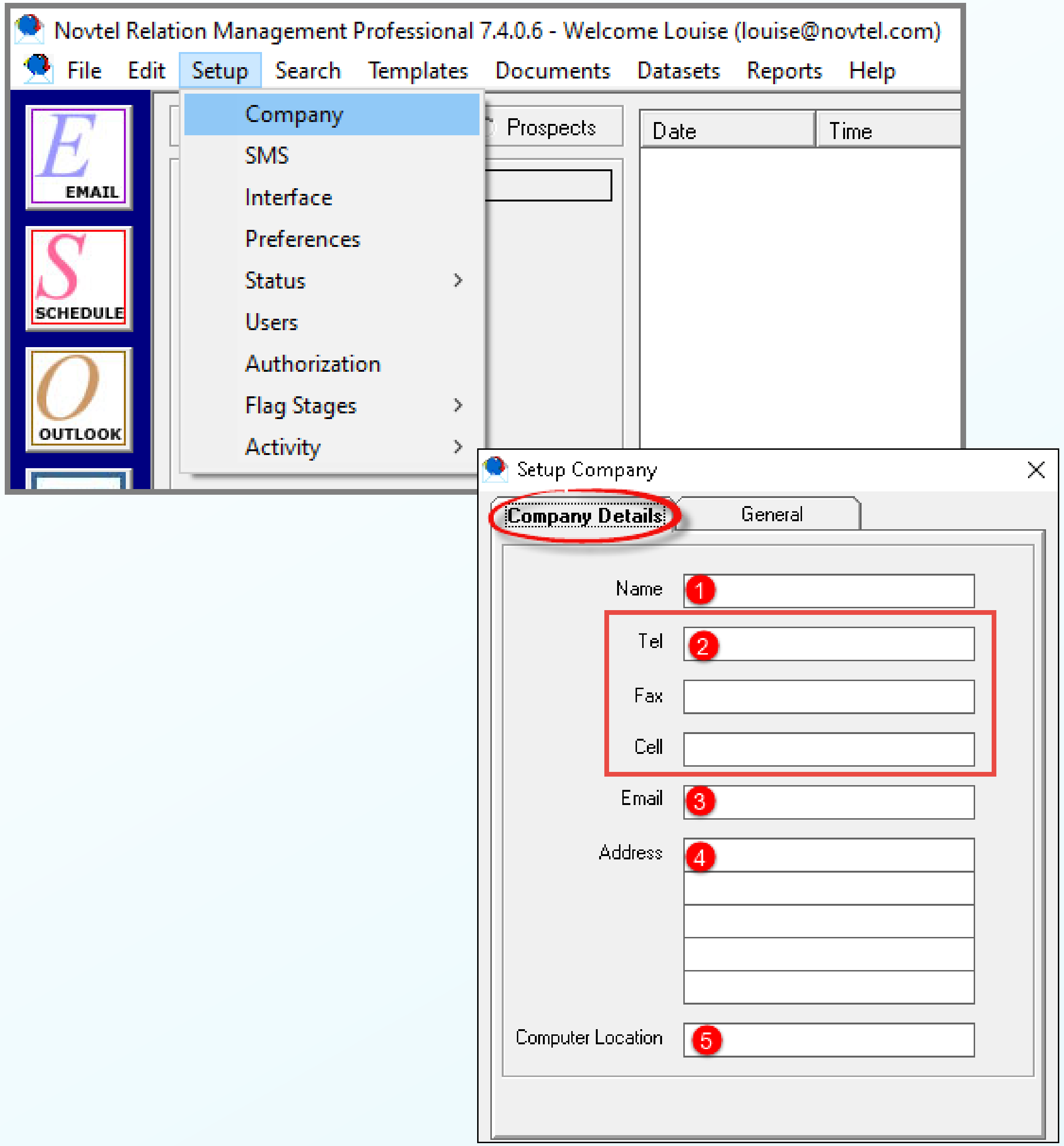
Setting up your Company and how the System Should Function

Setting Up your Company and How the System Should Function



In order to set up the company's details, as well as other options in the system, click on 'Setup Company'.

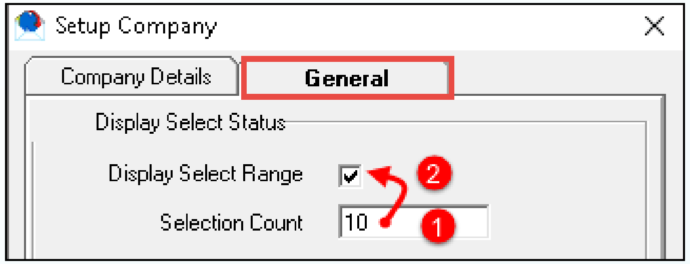
The Company Details Tab

In the Company Details Tab, the following details are to be entered:

1. Your Company's Name
2. The relevant contact numbers
3. The company's email address
4. The company's physical address
5. And the current PC's location – such as 'Admin Office'.

The General Tab

In the General Tab, the following options can be set up and activated:



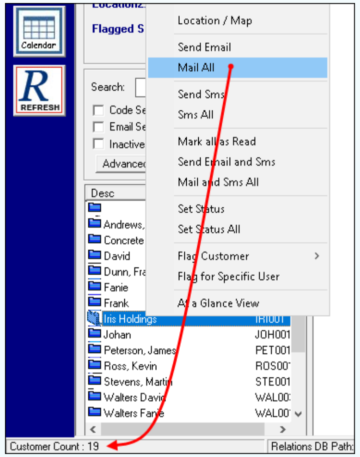
1 Selection Count

This option is used when an email is sent to multiple Customers; Suppliers or Prospects simultaneously.

The maximum number of emails allowed to be sent simultaneously, must be entered here.

- ✓ Keep in mind that when the number exceeds 200, it might be viewed and reported as Spam.

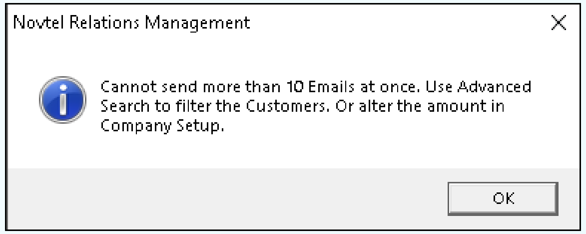
For demonstration purposes, we have entered the quantity as 10.



2 Display Select Range

When the ‘Selection Count’ quantity is set, and the ‘Display Select Range’ option is ticked, the User cannot email the number of Customers / Suppliers / Prospects indicated at the bottom of the screen when:

- ➢ The ‘Mail All’ option is selected
- ➢ And the number of accounts exceeds the allowed number of emails to be sent simultaneously

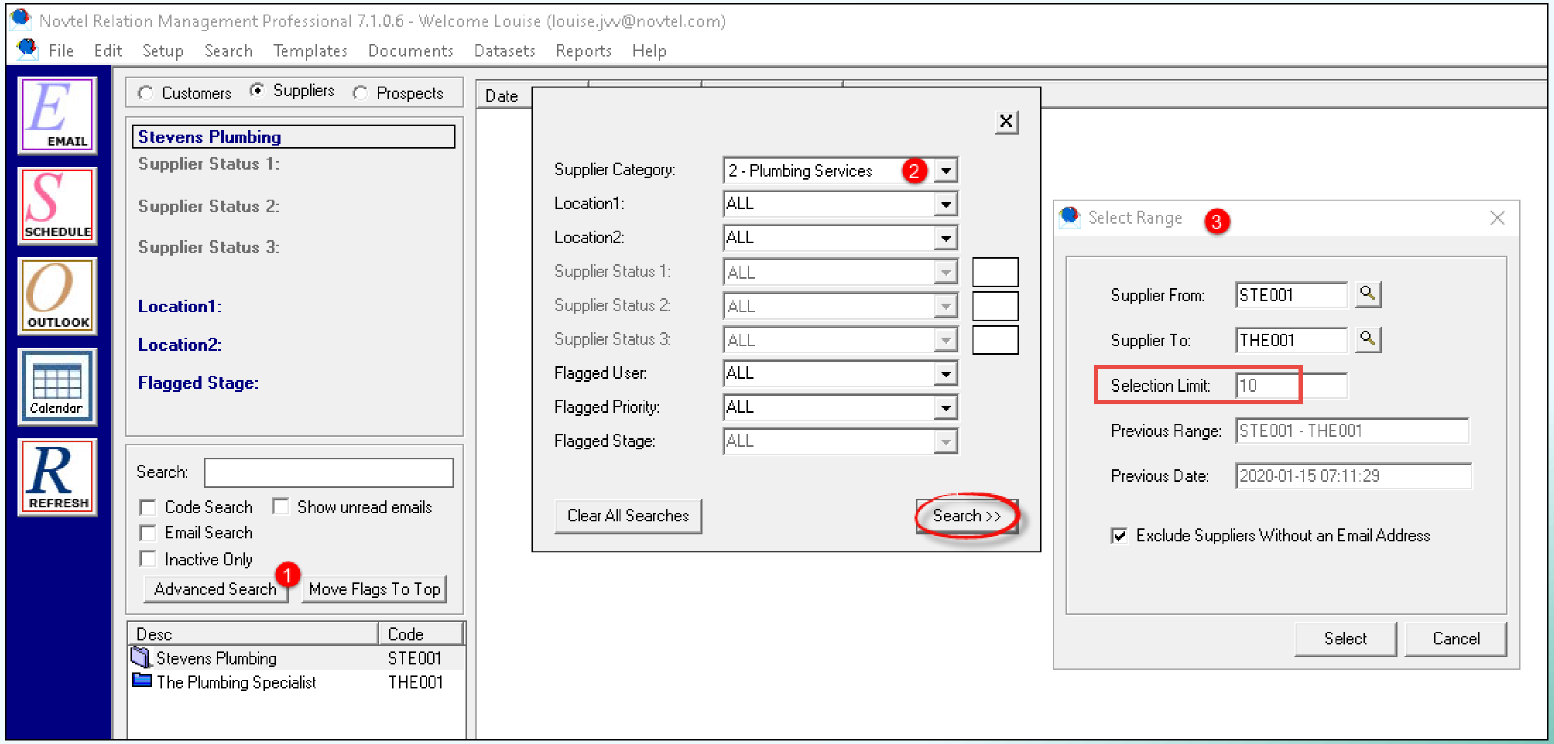


This message will be displayed when the set quantity is exceeded.

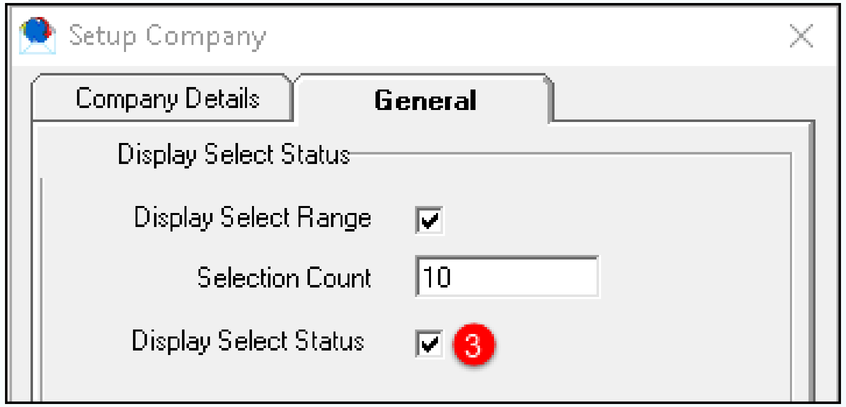
Setting Up your Company and How the System Should Function

To filter Accounts, the following steps are needed:

1. Click on the ‘Advanced Search’ option
2. Select the required Category and click ‘Search’
3. And in the ‘Select Range’ window, the Accounts linked to this category can be selected – provided that the number of accounts do not exceed the ‘Selection Limit’.

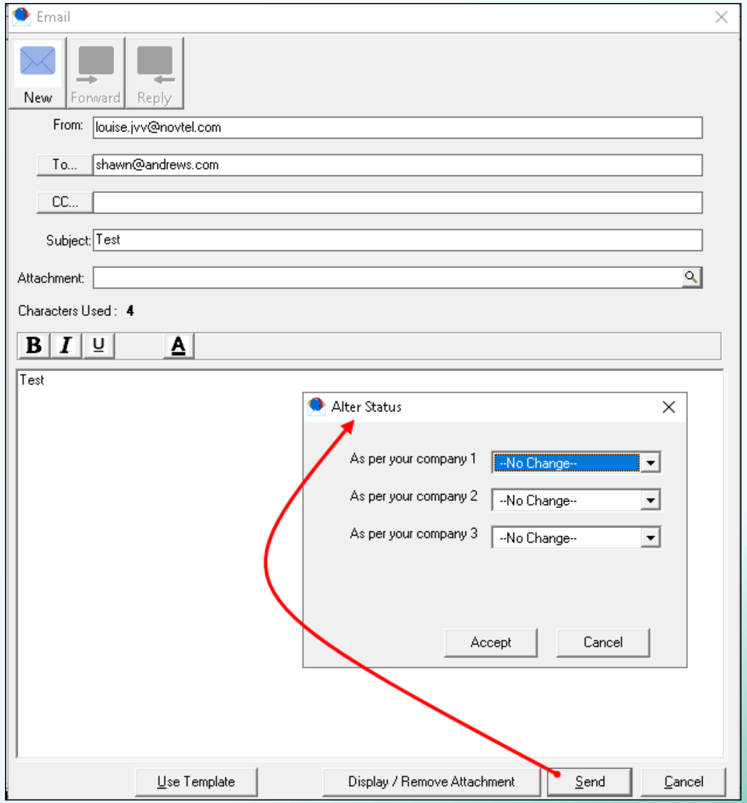


Setting Up your Company and How the System Should Function

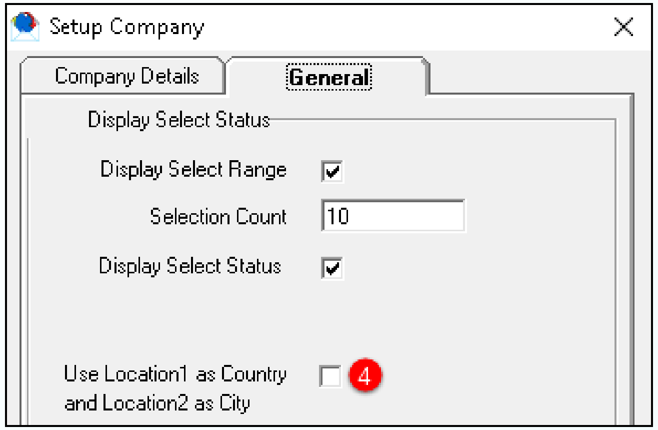


3 Display Select Status

When an email is being sent and the ‘Displayed Select Status’ option is ticked, the statuses for an individual Customer / Supplier / Prospect - or entire list as emailed - can be altered to reflect new statuses, if required.

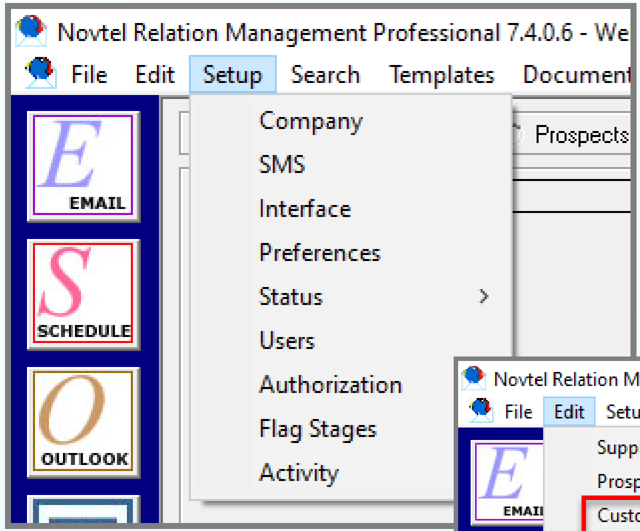


Setting Up your Company and How the System Should Function



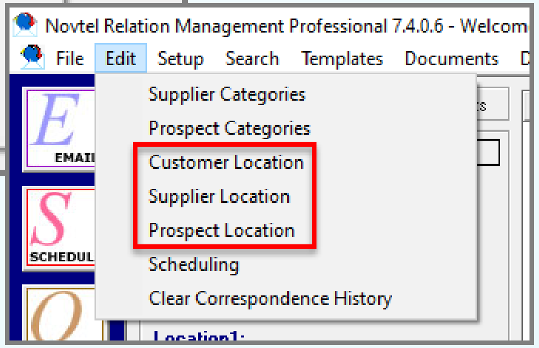
4 Use Location 1 as Country and Location 2 as City

Locations can either be customized by setting up your own Locations in Novtel, OR the option can be used to display Location 1 as the Country, and Location 2 as the City.

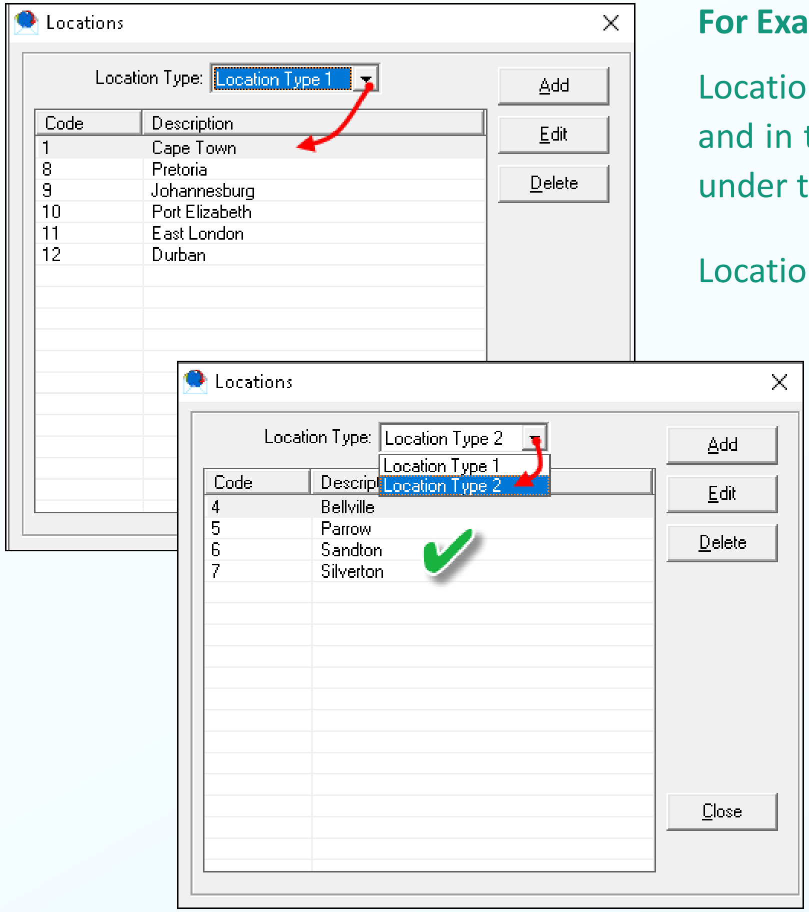


The effect on the system when this option is UNTICKED

By default, this option is unticked, and therefore the 'Locations' option is simply not available in the 'Setup' menu.



The User will be able to create Custom 'Locations' for Customers; Suppliers and Prospects respectively from the 'Edit' menu and link the required locations to the relevant Customer; Supplier or Prospect Master File.

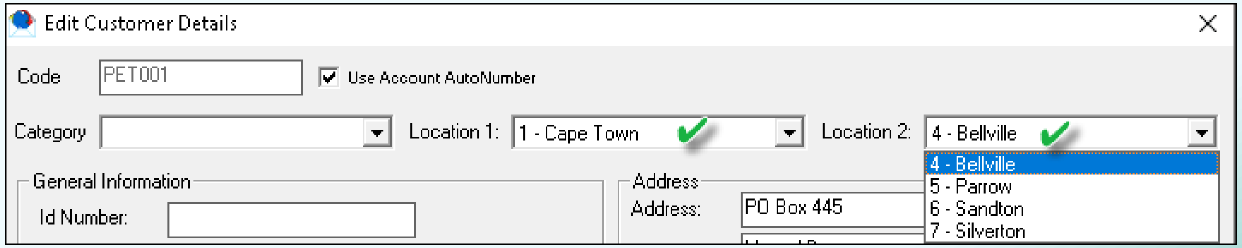


For Example:

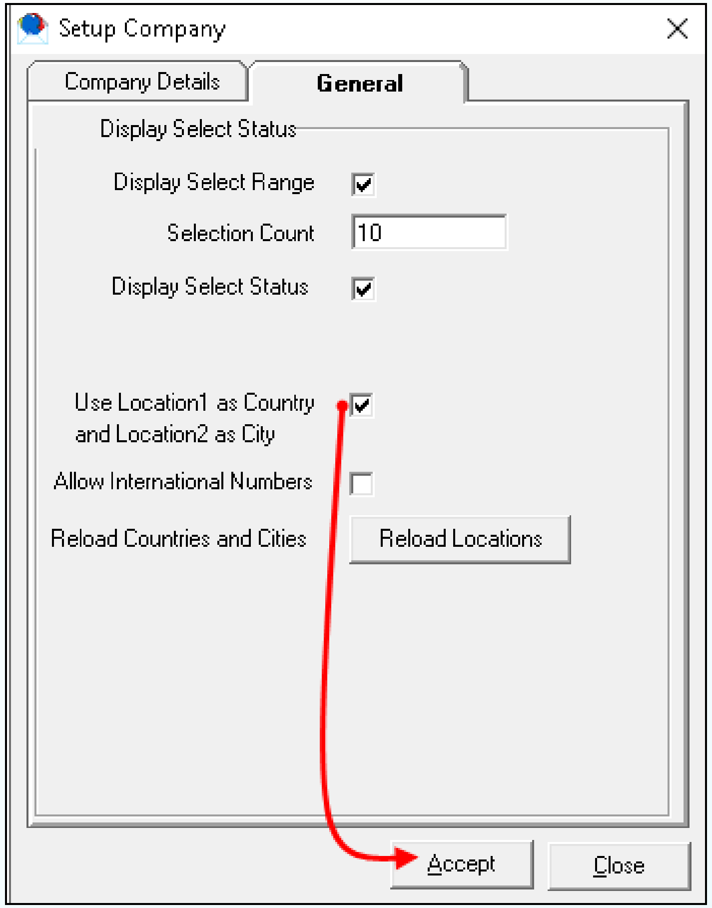
Locations can be customized according to your company's preferences, and in this case, we have created cities such as Cape Town; Pretoria, etc. under the 'Customer Locations' menu option, for Location 1.

Location 2 may refer to suburbs, and is created as such.

On this Customer Master File, 'Location 1' is selected as the city, and 'Location 2' is selected as the suburb.

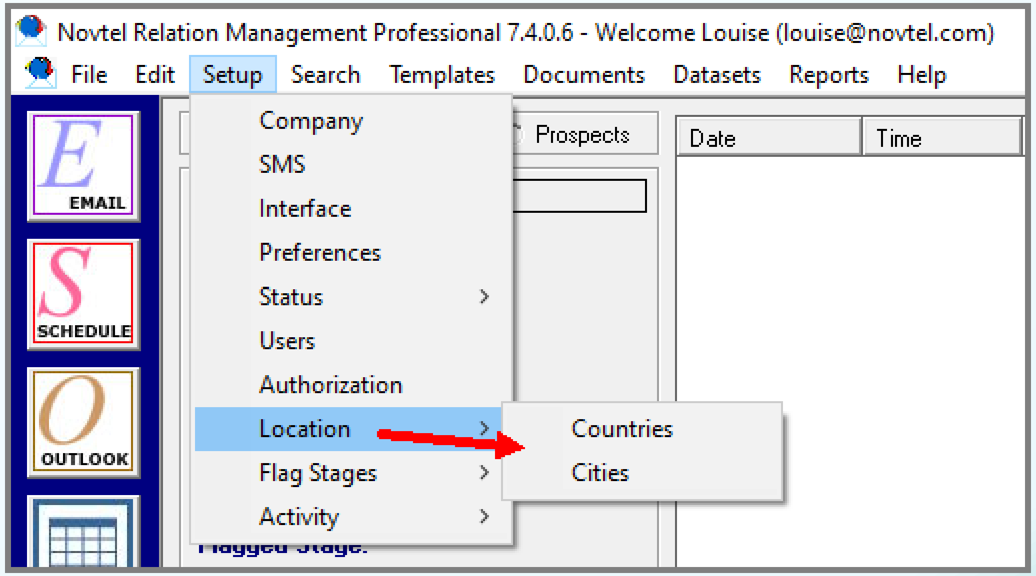


Setting Up your Company and How the System Should Function

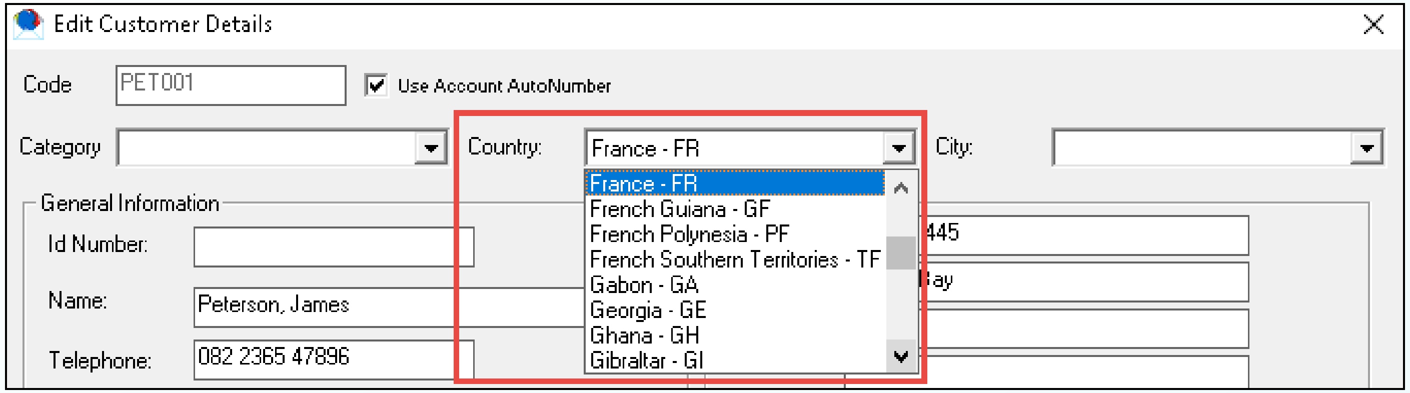


The effect on the system when this option is TICKED:

By ticking the ‘Use Location 1 as Country and Location 2 as City’ option and clicking ‘Accept’, the ‘Location (City and Country)’ option is activated in the ‘Setup’ menu.

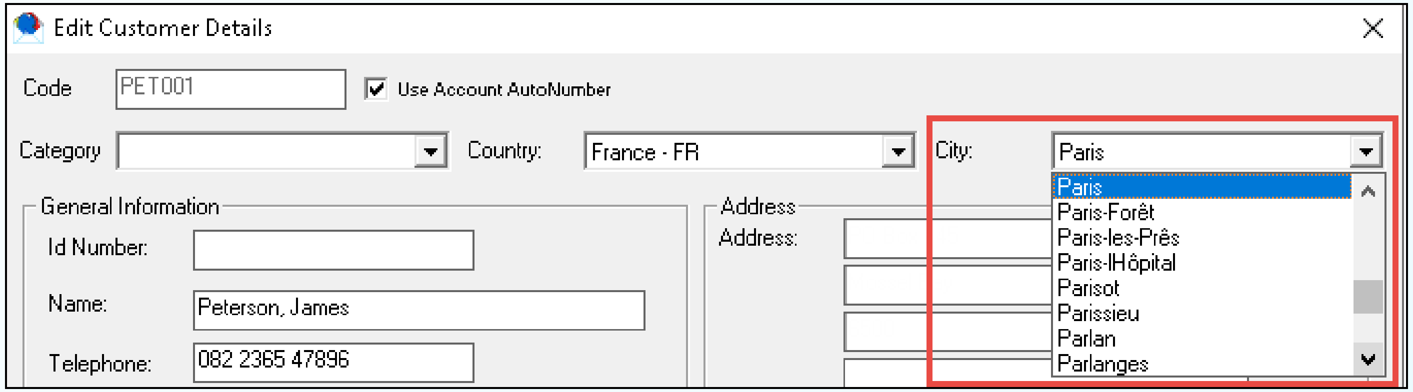


Setting Up your Company and How the System Should Function



On the Customer; Supplier and Prospect Master Files, a list of 251 Countries will be available for selection, and the relevant Country can be linked to the master file.

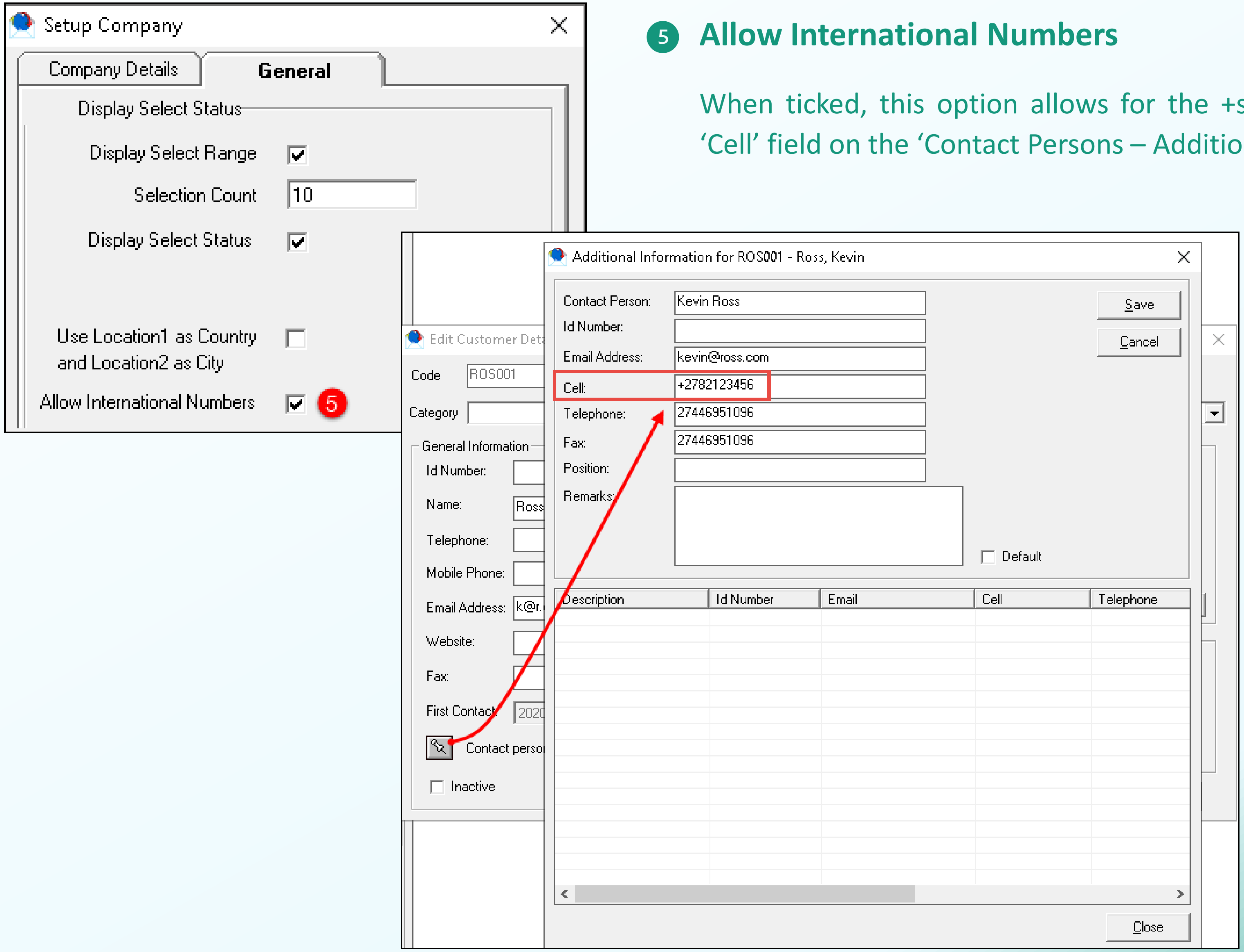
Simply type the first letter of the country's name and scroll down the list until the applicable country is displayed. Then, click on it to select it.



Once the country is selected, only cities within this country will be available for selection in the 'City' field.

Apply the same method by typing the first letter of the City's name; scroll down the list until the applicable City is reached, and click on it to select it.

Setting Up your Company and How the System Should Function

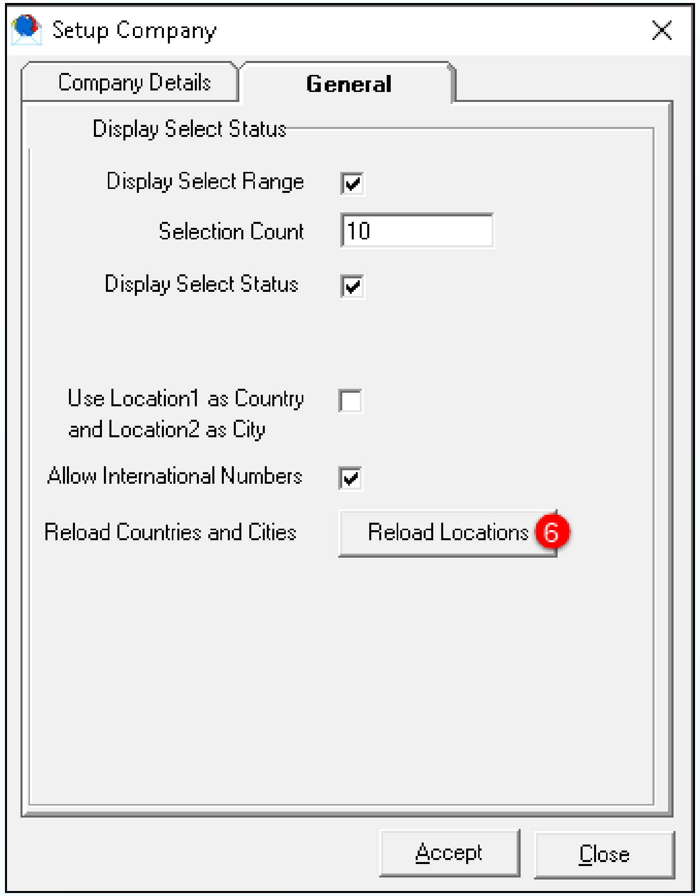


5 Allow International Numbers

When ticked, this option allows for the +sign to be added to the 'Cell' field on the 'Contact Persons – Additional Information' screen.

Should the 'Allow International Numbers' option be unticked, only the numeric value will be allowed in the 'Cell' field on the 'Contact Persons' screen.

Setting Up your Company and How the System Should Function

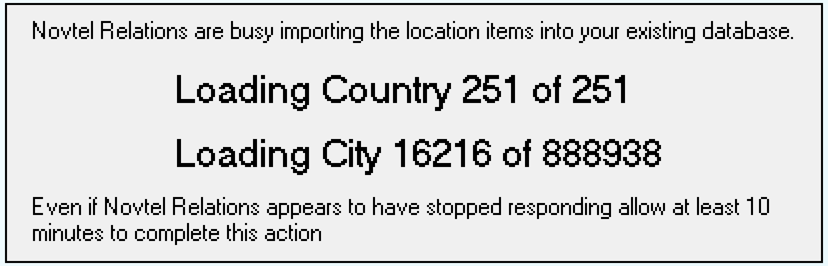


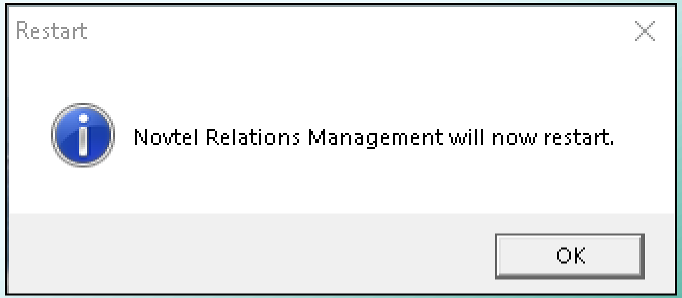
6 Reload Locations (Countries and Cities specifically)

It is not generally necessary to select the ‘Reload Locations’ button.

However: If it is selected, Novtel will reload ALL Cities and Countries in the system – which has been pre-set in Novtel – and it will prove extremely time consuming.

Only once the process is completed – which may be in excess of 10 minutes - the User will be able to access the system again after restarting Novtel.





Novtel® Relations Management

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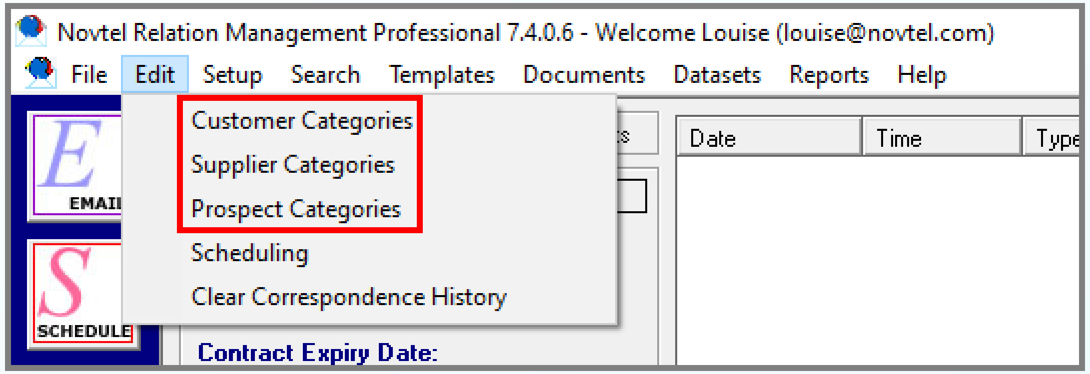
Creating Supplier and Prospect Categories

Creating Supplier and Prospect Categories

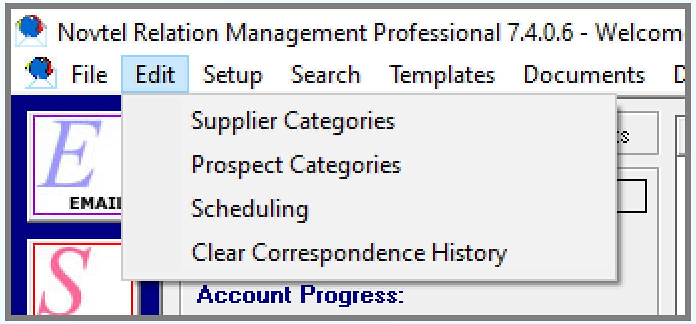
Categories are created for Customers, Suppliers and Prospects, respectively.

When creating or editing any Customer; Supplier or Prospect Account, the relevant Category can be linked to the master file, which can be used to perform an advance search to email or SMS accounts linked to the same Category, simultaneously.

In addition, can a User be given access to selected ***Customer*** Categories only, when they log into Novtel.



Should Novtel be used as a stand-alone product, and not interface with a financial system, Customer Categories too are set up in Novtel from the 'Edit' menu.



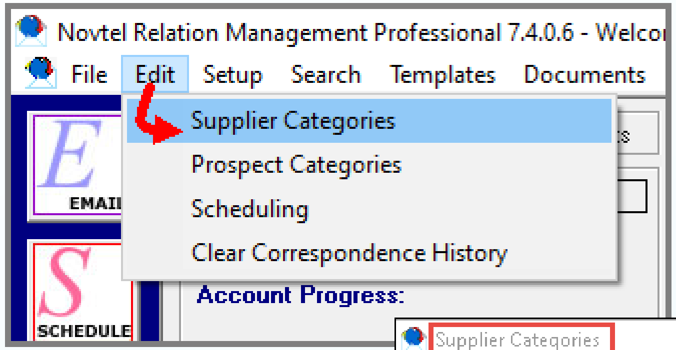
However: If Novtel is integrated with a financial system, the 'Customer Categories' option is not available in Novtel since these categories are set up in the financial system.

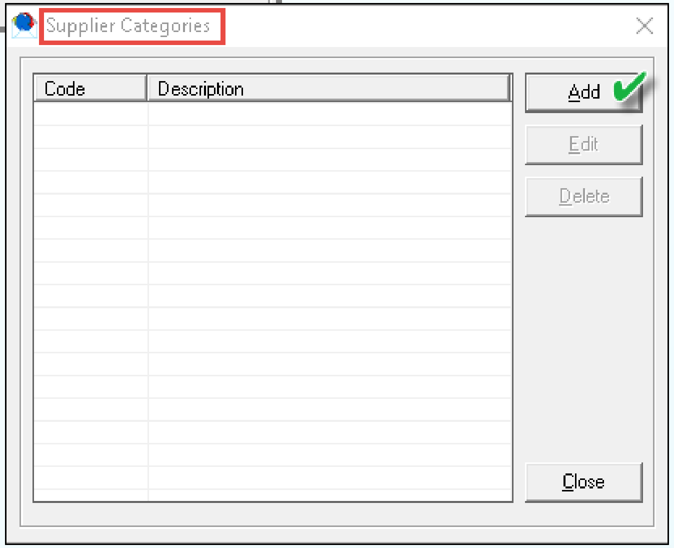
As our system integrates with Sage Pastel, the Customer Categories have been set up in the financial system and are available in Novtel for selection.

Creating Supplier and Prospect Categories

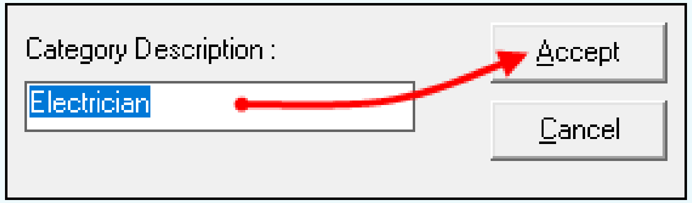
The process of creating Supplier and Prospect Categories in Novtel, are exactly the same.

First select the applicable ‘Categories’ option to be created from the ‘Edit’ menu and click ‘Add’.

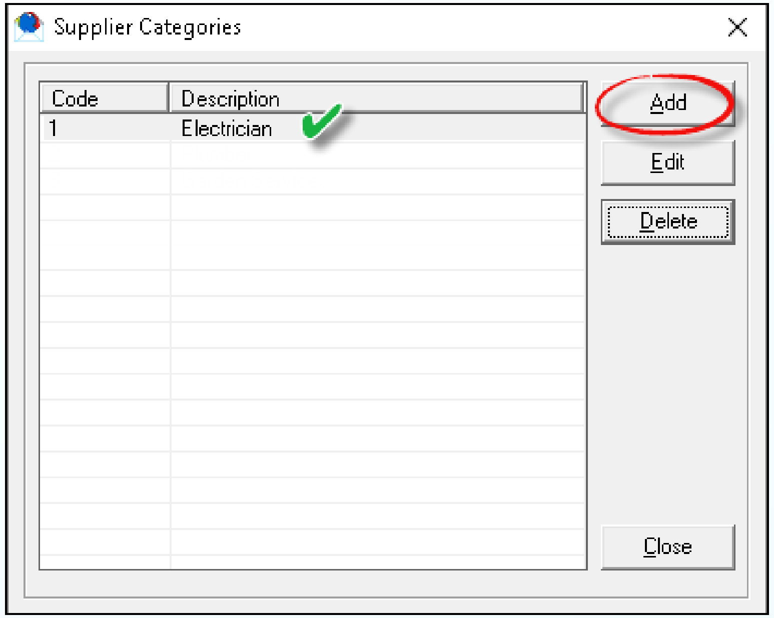




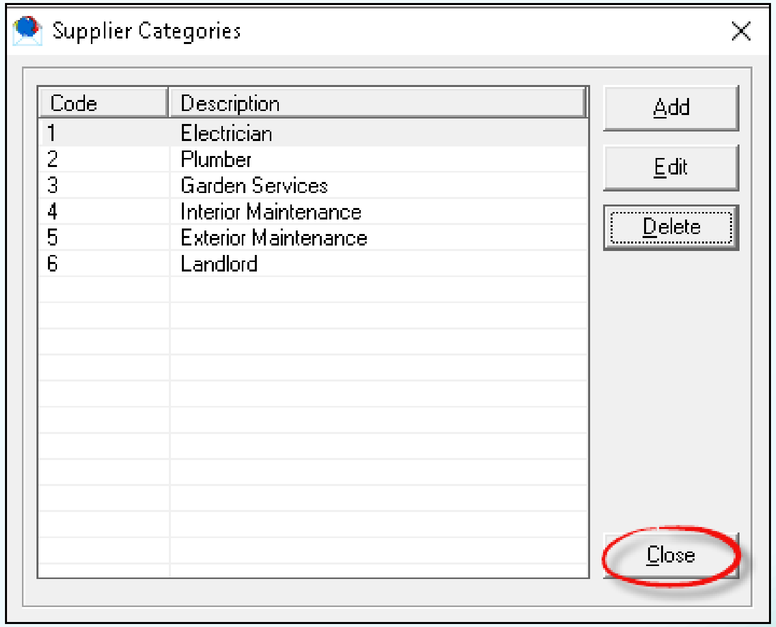
Enter the description for this Category and click ‘Accept’ to save it.



Creating Supplier and Prospect Categories



This Category is now saved, and the process is repeated to create all other relevant Categories according to your Company’s specifications and requirements.



Novtel® Relations Management

4

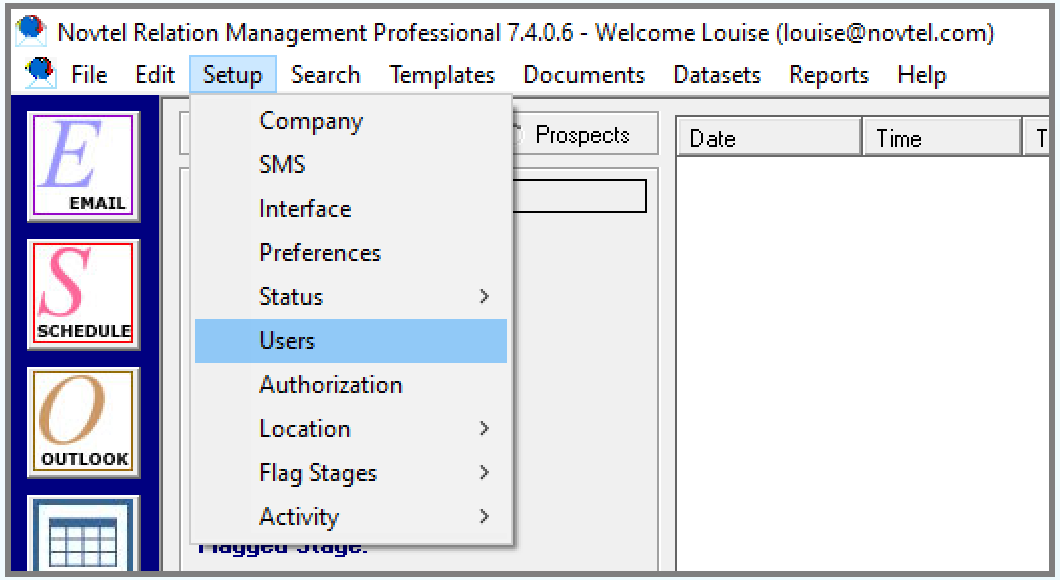
Users and Passwords

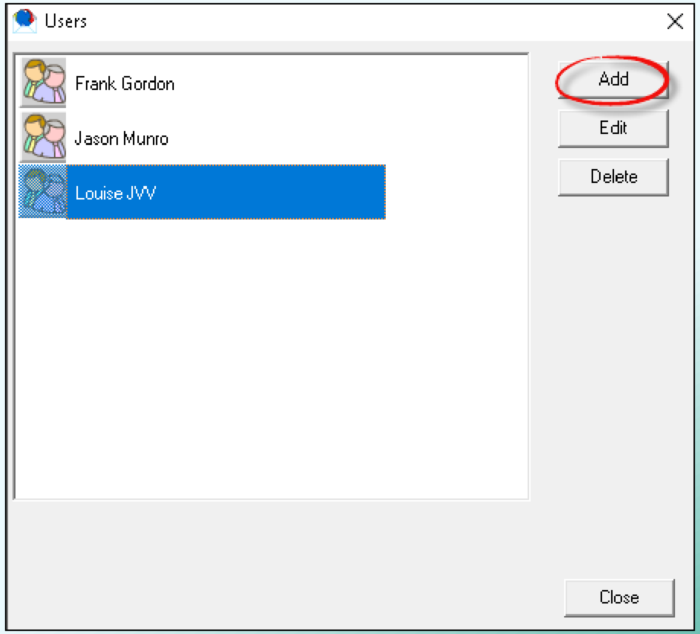
Users and Passwords

User Master Files are created for all personnel who will be working on the Novtel system.

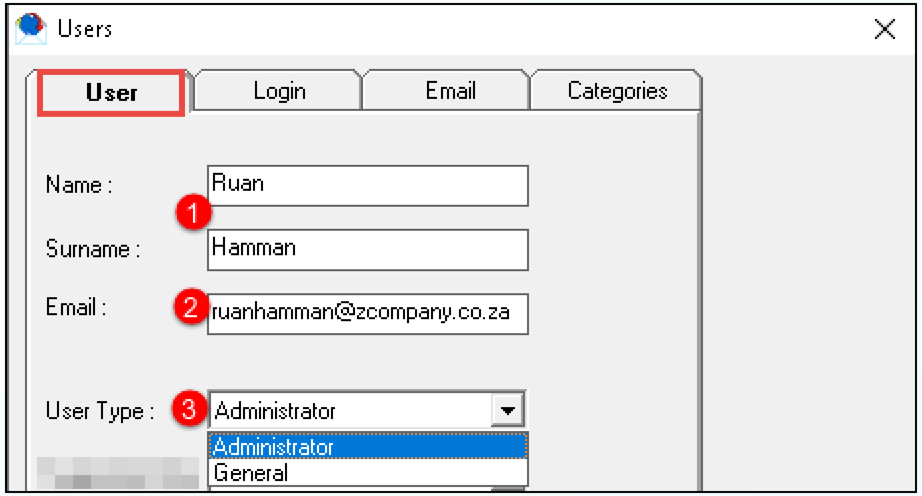
- ✓ Tasks can be scheduled and assigned to system Users, and the progress can be tracked.
- ✓ Customer, Supplier and Prospect Accounts can be flagged for a specific User, and a priority level set.
- ✓ Correspondence between Users and Customers; Suppliers and Prospects can be tracked, and a report can be produced.
- ✓ Whenever an action was taken on any account, the name of the User performing the task will be recorded next to the action.

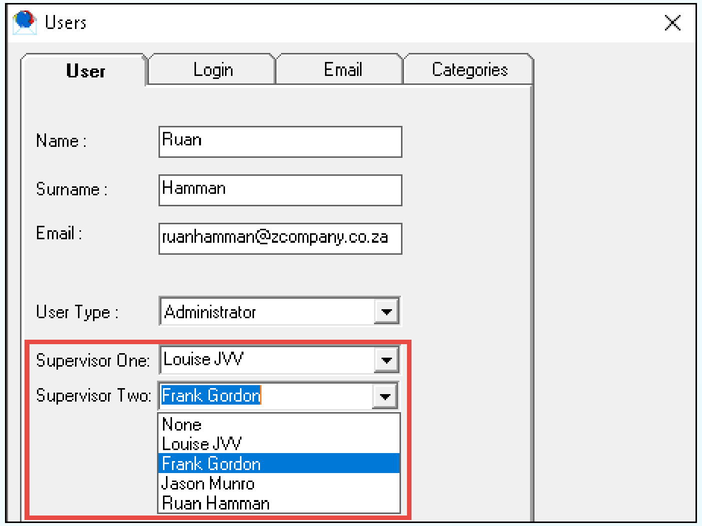
To create new system Users, click on ‘Setup – Users’, and click ‘Add’ in the next window.





Users and Passwords





User Tab

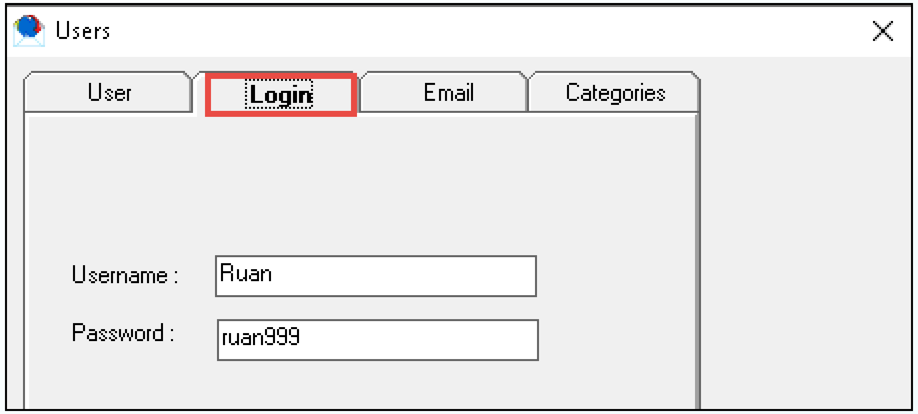
In this tab, the following information is to be entered:

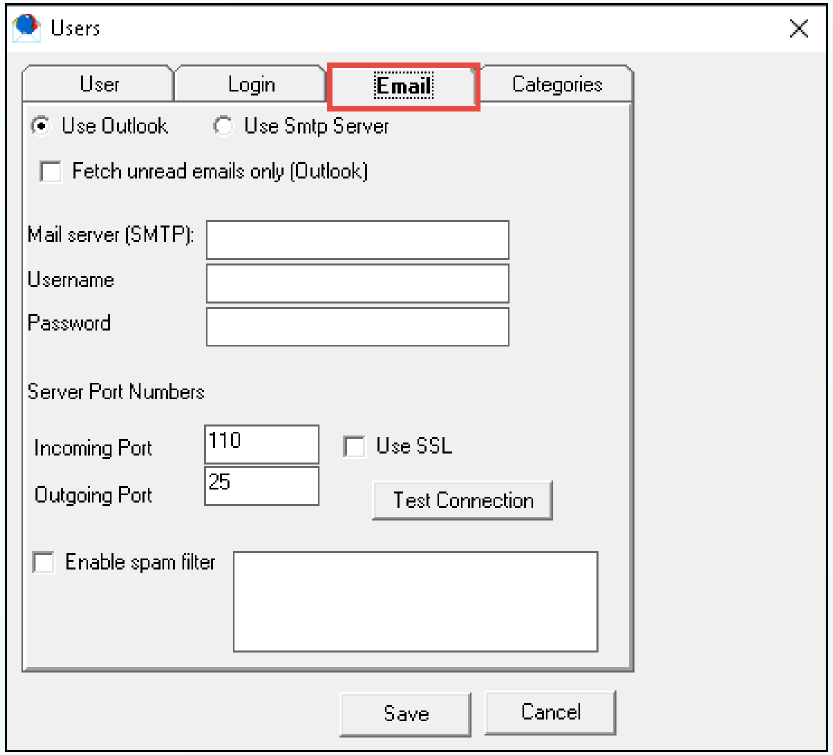
1. The User's Name and Surname.
2. The email address to and from which communications; reminders and task assignments will be sent.
3. The User Type is to be selected as either Administrator or General.

If applicable – and provided that other Users have been set up already - a specific Supervisor can be selected and linked to this User's master file.

If not applicable, select the option as 'None' in both these fields.

Users and Passwords





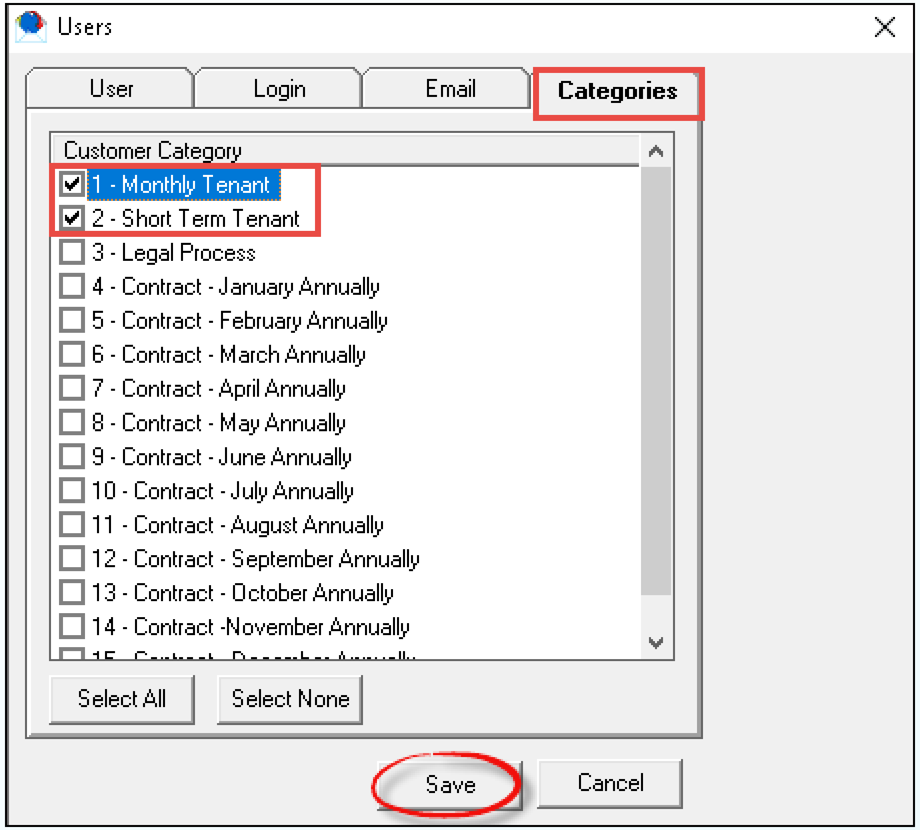
Login Tab

In this tab, the person’s Username and Password is to be entered.

Please note that Novtel is case sensitive, and the password must be entered in the exact same manner when attempting to log into the system, as set up here.

Email Tab

We recommend that your IT personnel be involved in the setup of this tab, as the settings entered and selected here will determine if emails can be sent and received in Novtel by this User.

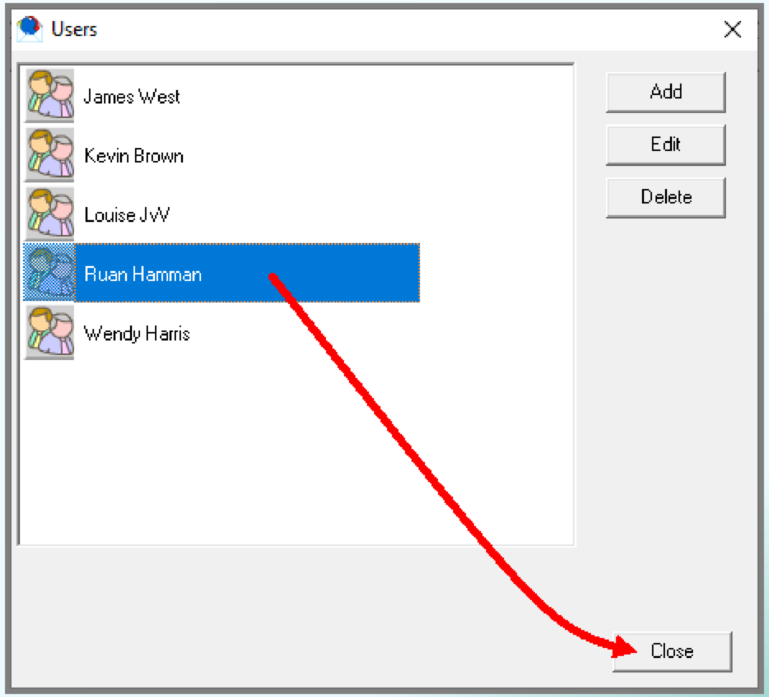


Categories Tab

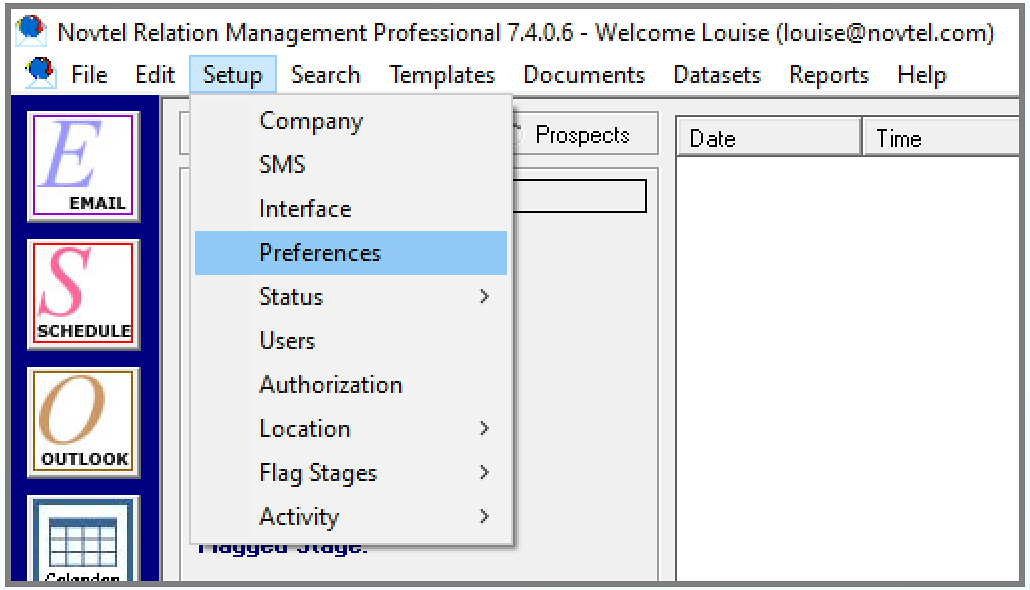
A User can be ‘assigned’ specific Customer Categories to which they will have access when they log into the system.

They will only have access to Customer Accounts linked to the selected Categories here.

When done, click ‘Save’ to capture the User Master File to the system.

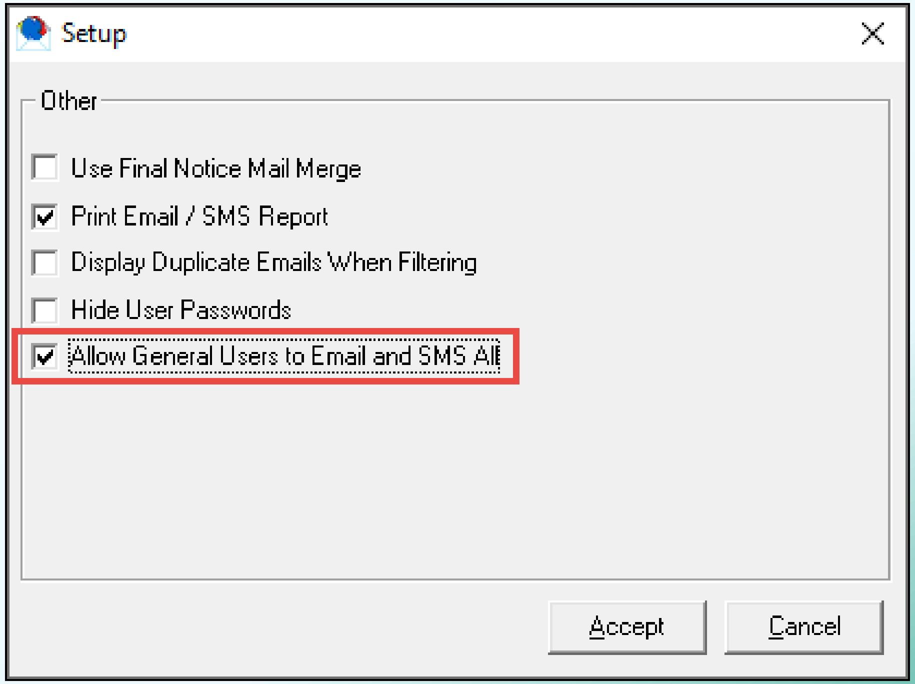


Users and Passwords



By default, ‘General’ Users do not have access to the option to ‘Mail All’, ‘SMS All’ and ‘Mail and SMS All’.

However: If required, the option can be activated in the ‘Setup – Preferences’ window to allow these actions.



5

Setting up Statuses

Setting up Statuses

There are 3 main 'Statuses' to be created for Customers, Suppliers and Prospects, respectively.

Unlimited sub-statuses can be created and linked to each main status.

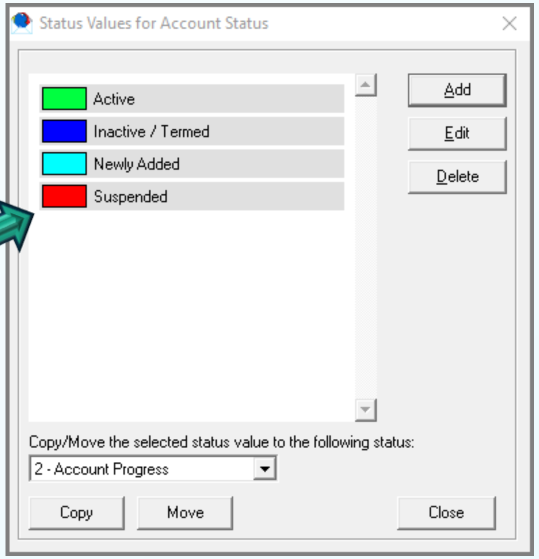
The purpose is to determine the status of each individual account, at any given time.

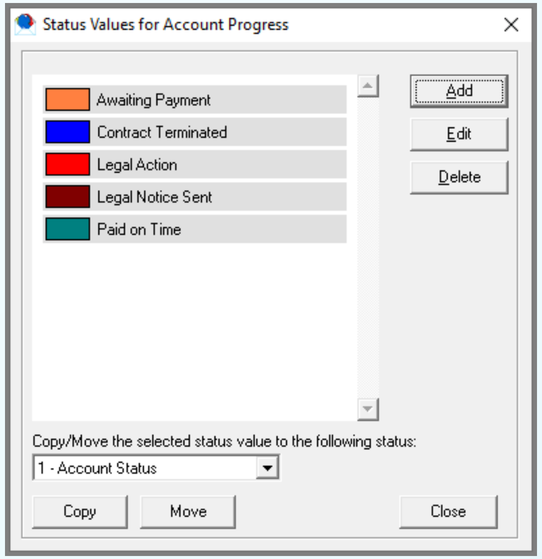
Specific statuses can be selected when an Advanced Search is performed to filter accounts linked to the same statuses. A bulk email and / or SMS can be sent to all accounts listed, simultaneously.

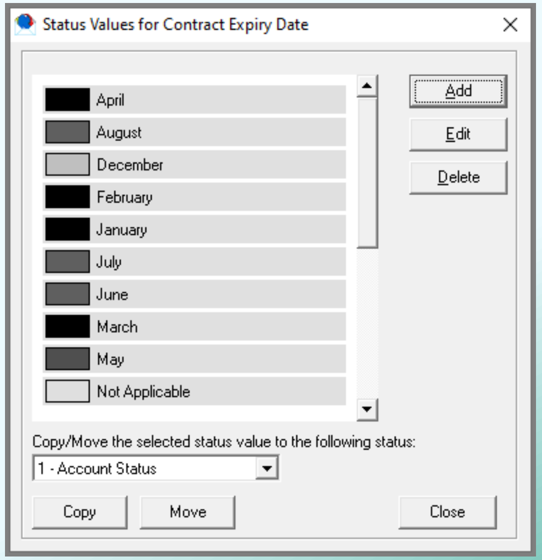
Examples of **Customer Main and Sub-Statuses** may be set up as follow:

The Main Statuses are displayed at the top of the screen.

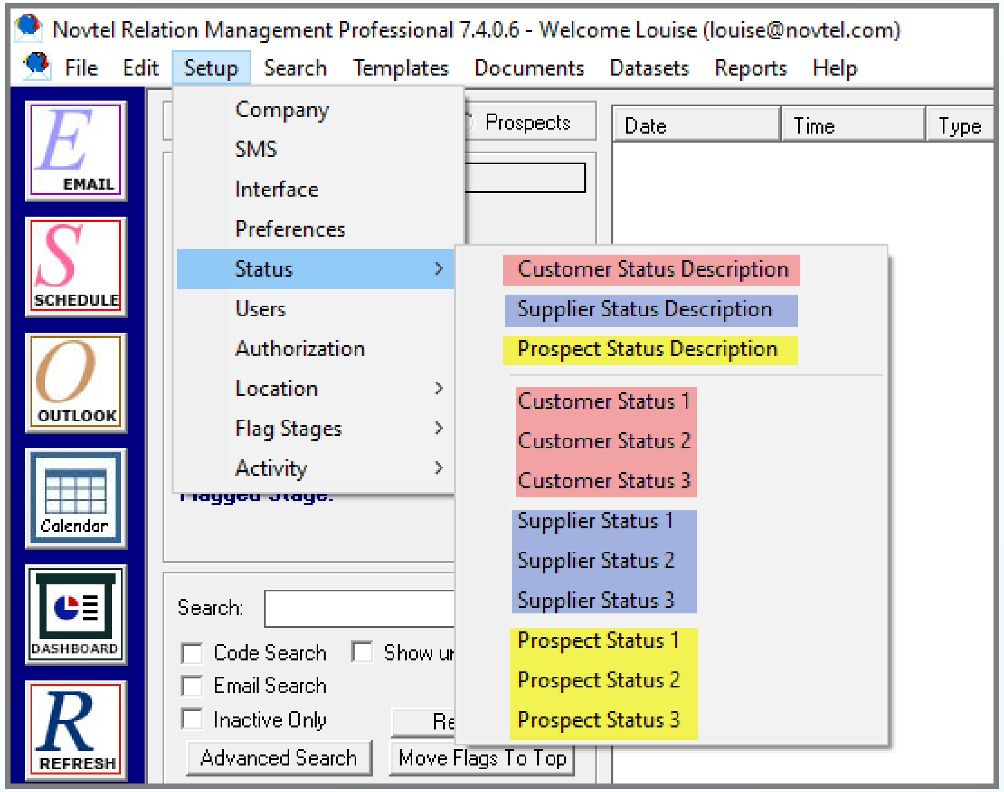
Sub-Statuses are linked per main status.







Setting up Statuses



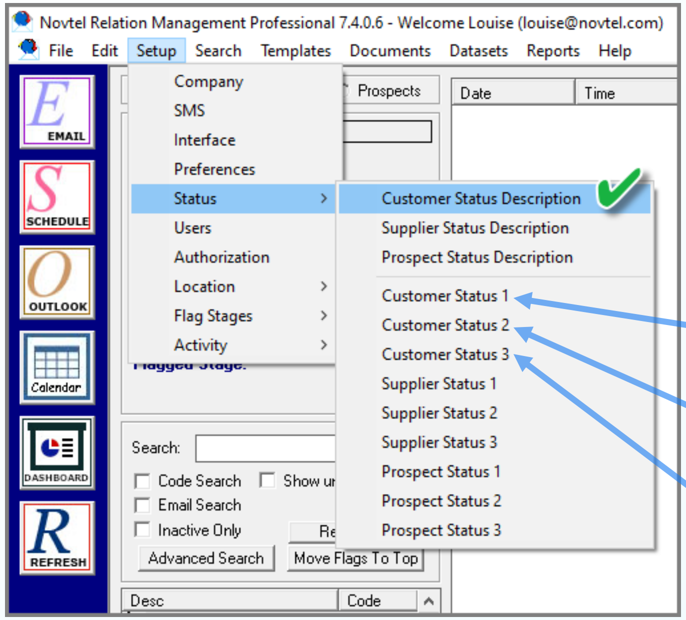
Remember that the same principles apply in the creation and linking of all statuses and sub-statuses.

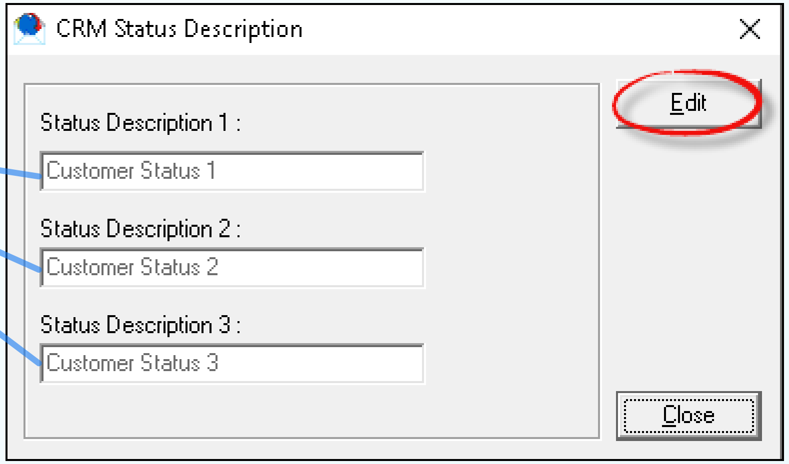
By default, the 'Main Statuses' will be displayed as:

- Customer Status 1, 2 and 3
- Supplier Status 1, 2 and 3
- And Prospect Status 1, 2 and 3

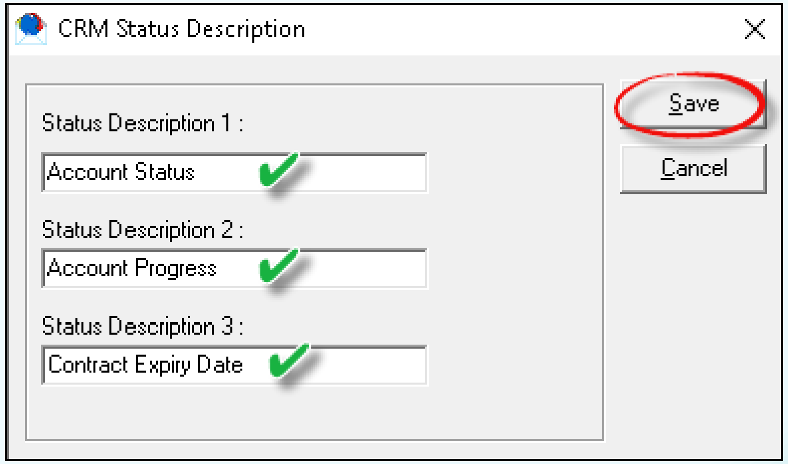
By either selecting the 'Customer Status Description'; 'Supplier Status Description' or 'Prospect Status Description' option, 3 Main statuses can be set up respectively, which will change the default Customer; Supplier and Prospect descriptions according to your customized version.

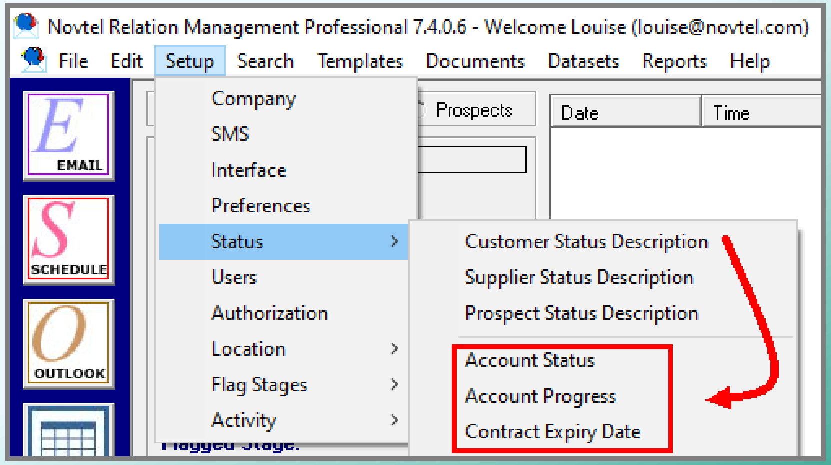
Setting up Statuses – Main Status Descriptions



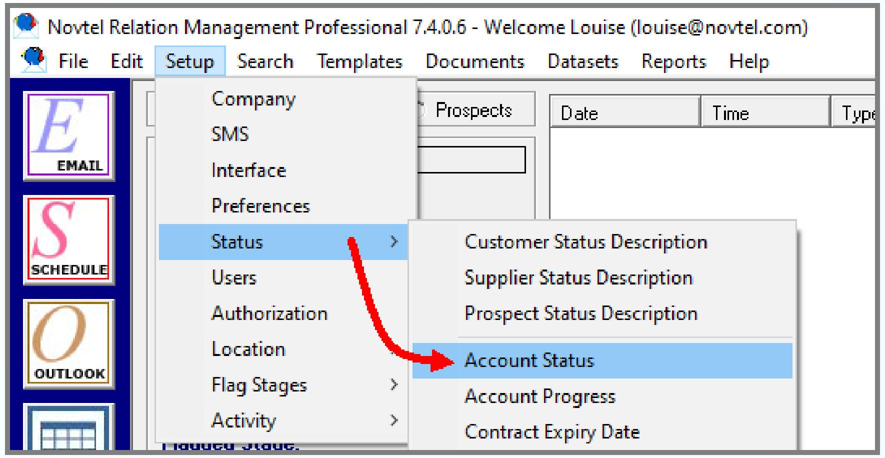


By selecting the ‘Customer Status Description’ option and clicking ‘Edit’, the Main Customer Status Descriptions can be changed and saved.



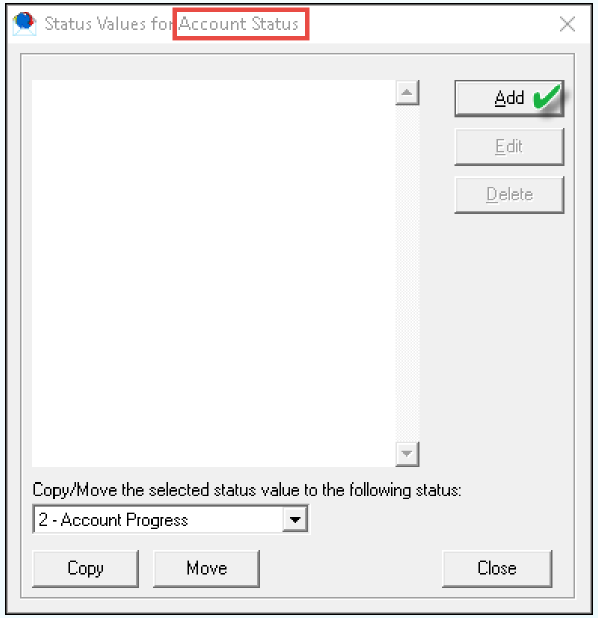


Setting up Sub-Statuses



The main statuses alone will not be effective at all, and sub-statuses are now to be created and the relevant status options linked to each Customer Master File.

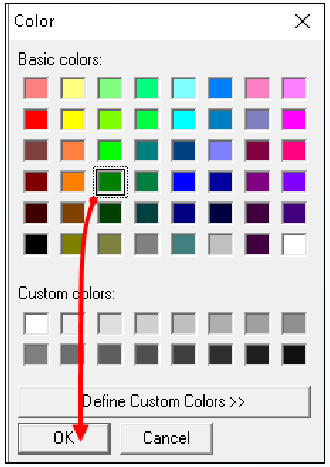
By clicking on the 'Setup' menu and viewing the status options for Customers, the first Customer Main Status is selected by clicking on it.



The selected main status is displayed at the top of the window, and to create the first sub-status to be linked to it, click 'Add'.

Click on the search option here to assign a specific colour to this sub-status.

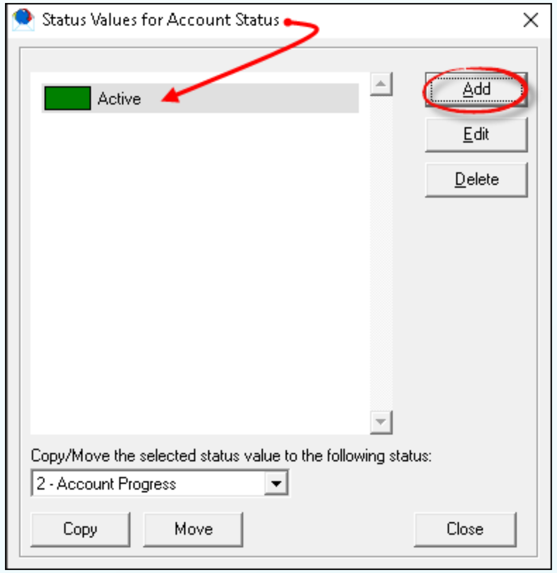
Setting up Sub-Statuses



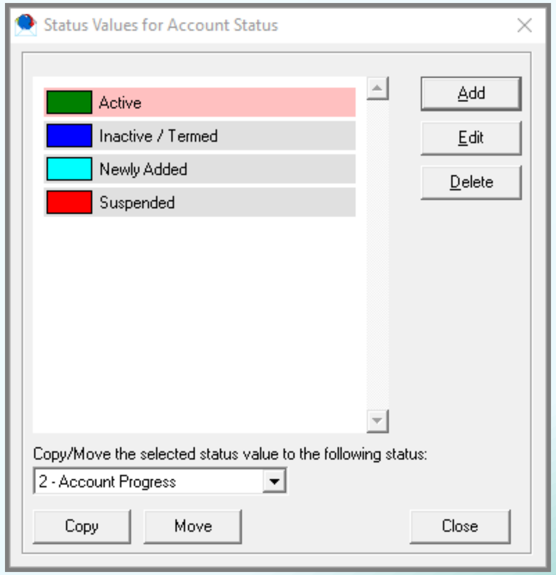
We recommend that darker colours are selected and linked to all sub-statuses as it is much easier to read in the main window.

Select the required colour and click 'OK'.

1. The selected colour is now displayed as the 'Assigned Colour'.
2. Enter the status description here and click 'Save'.

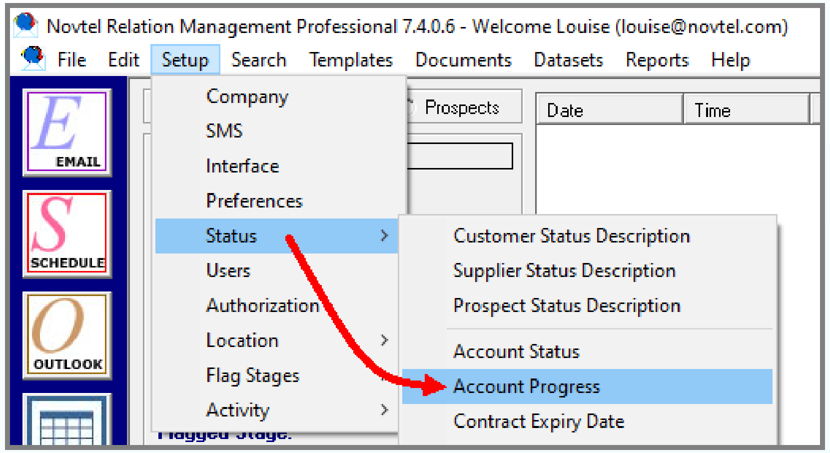


The first sub-status for the 'Account Status' option is now created successfully and is displayed here.



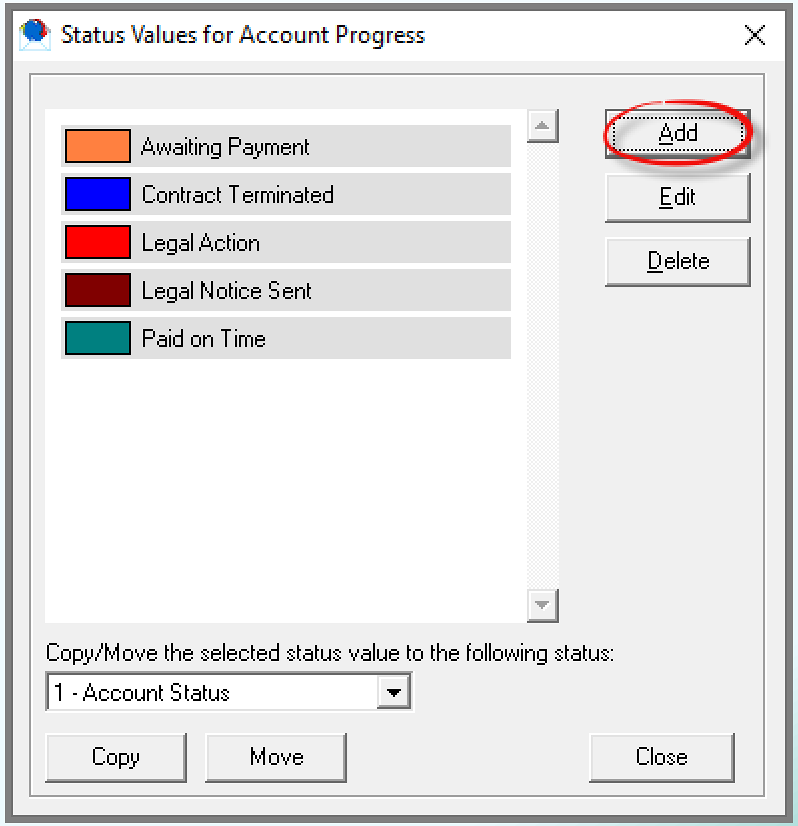
To create the next sub-status, click 'Add' and repeat the process until all relevant sub-statuses under this main status have been created.

Setting up Sub-Statuses

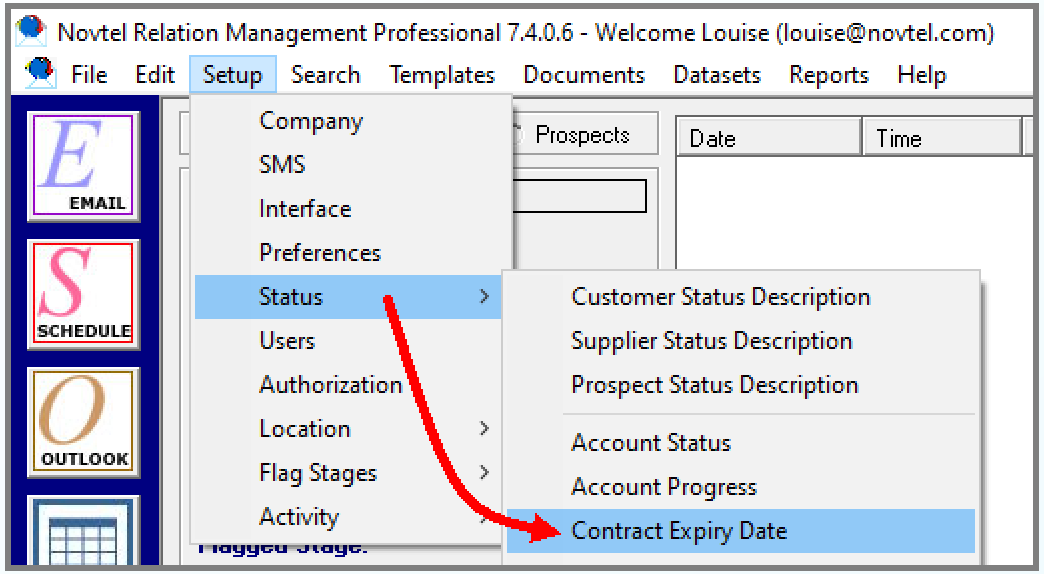


Proceed to click on the second main Customer status and create all relevant sub-statuses here in the same manner as explained previously.

When done, click 'Close'.

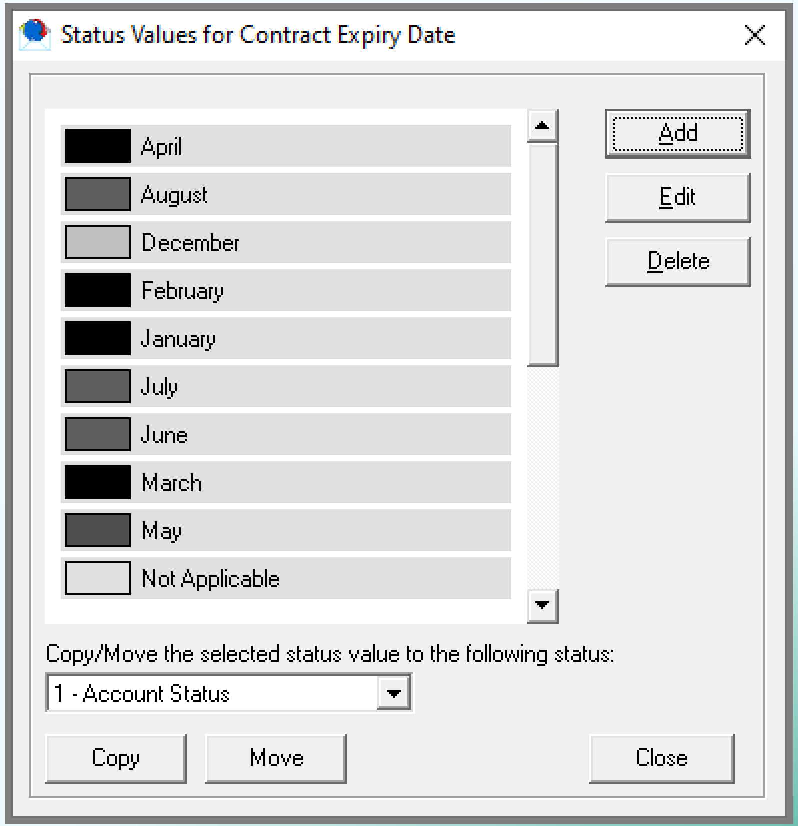


Setting up Sub-Statuses

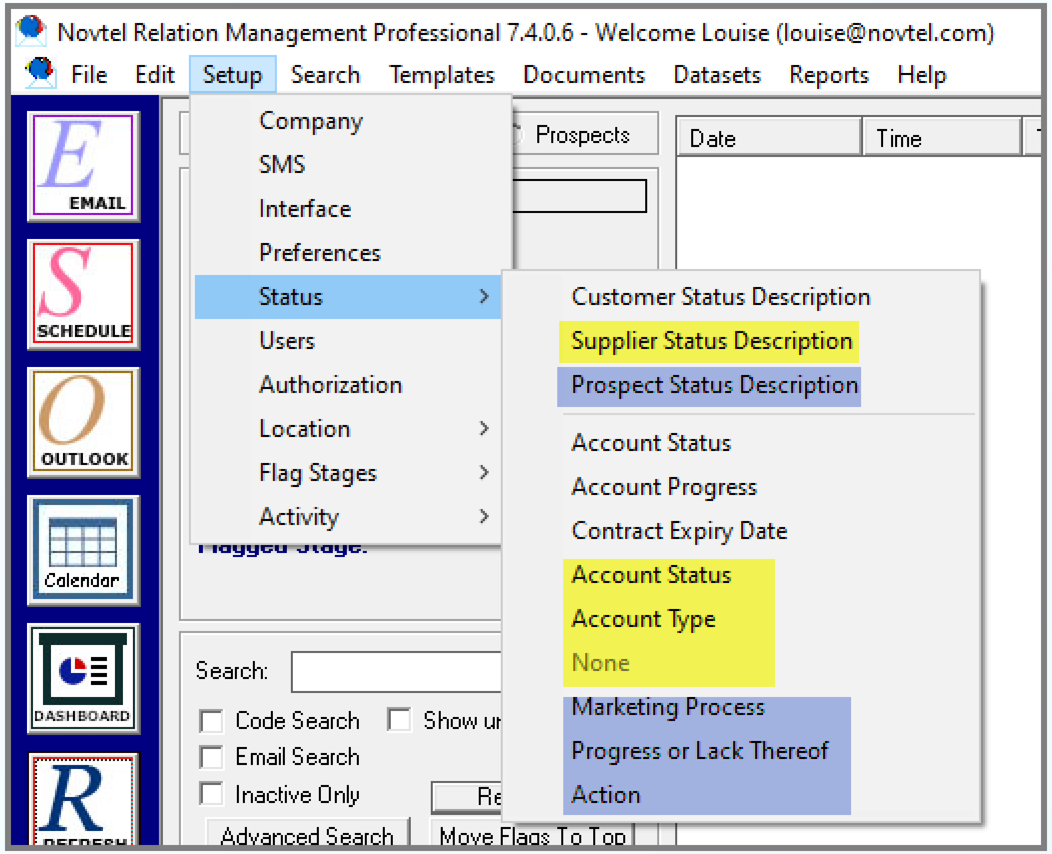


The same principles are applied to create sub-statuses for the 3rd and last Customer main status. Select this status option from the 'Setup – Status' window.

Create the sub-statuses relevant to this main status and click 'Close' to exit.



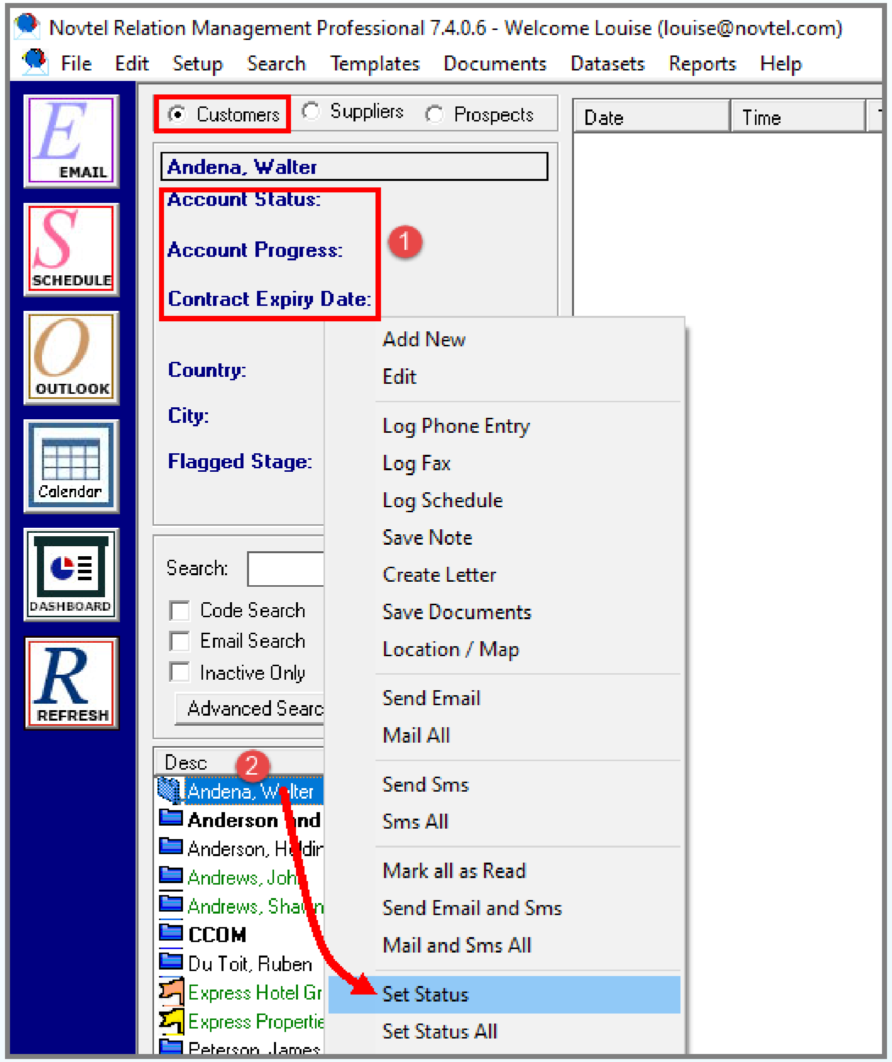
Setting up Supplier and Prospect Statuses



The exact same principles apply to the creation of main and sub-statuses for Suppliers and Prospects.

1. First customise the Main Statuses.
2. Select the main statuses one by one and create the relevant sub-statuses for each individually.

Setting Statuses to an Account

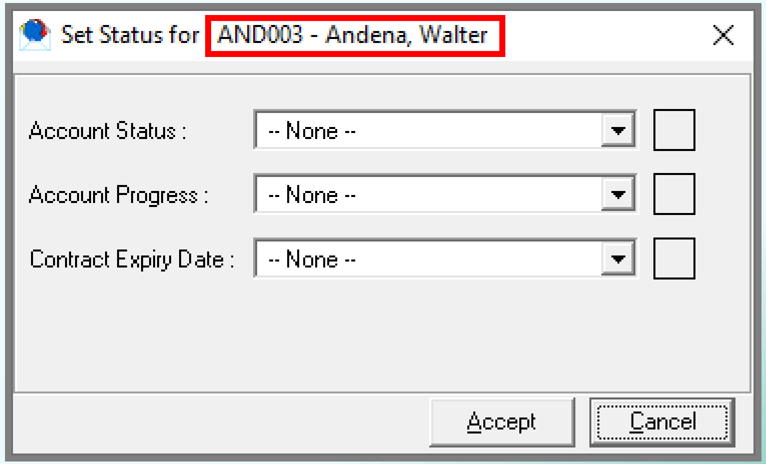


If statuses are not linked to the various accounts, it will not have any affect. Therefore, it must be linked correctly to obtain the desired results.

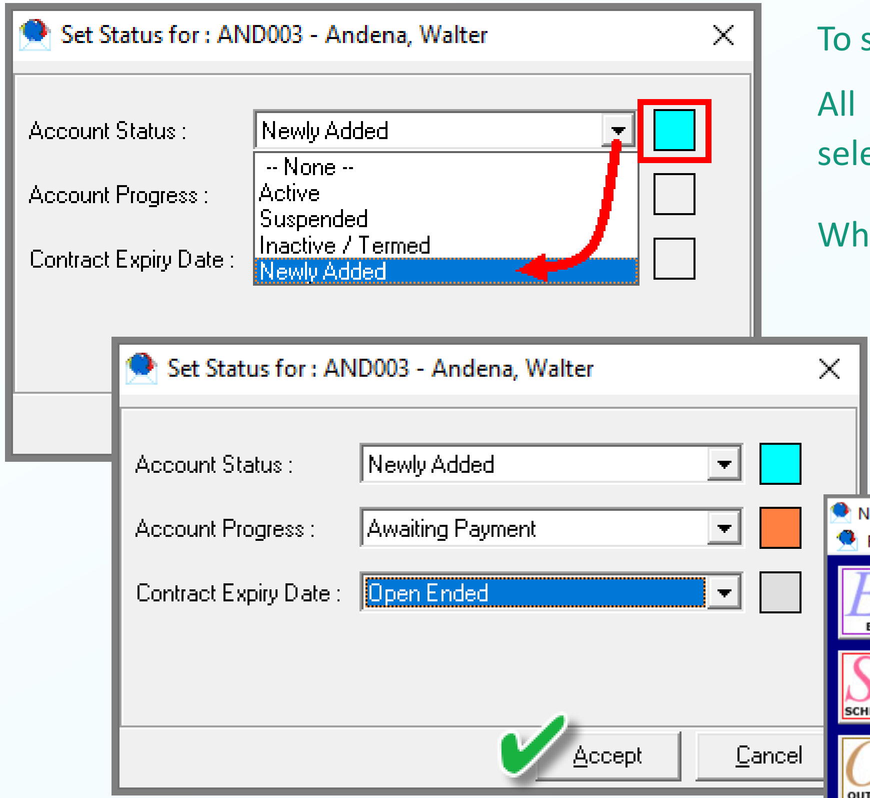
We recommend that when a Customer, Supplier or Prospect Master File is created, the status is immediately set according to the Account's actual status to avoid a great deal of work later.

1. At present, no status details are displayed for the selected Customer in the main screen yet.
2. To link this Customer to a specific set of sub-status under main status 1, 2 and 3, right-click on the account, and select 'Set Status'.

The 3 main statuses in this window are displayed as set up, but the sub statuses are all displayed as 'None'.



Setting Statuses to an Account

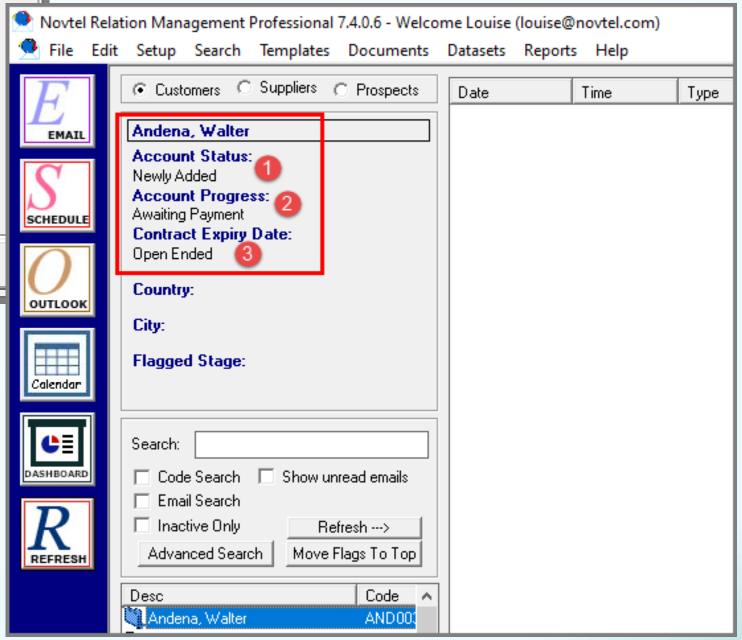


To set the applicable status in the first field for this Customer Account, click on the down arrow.

All sub-statuses linked to this main status will be listed and the correct option can now be selected.

When selected, the colour linked to the selected status, is displayed next to the first field.

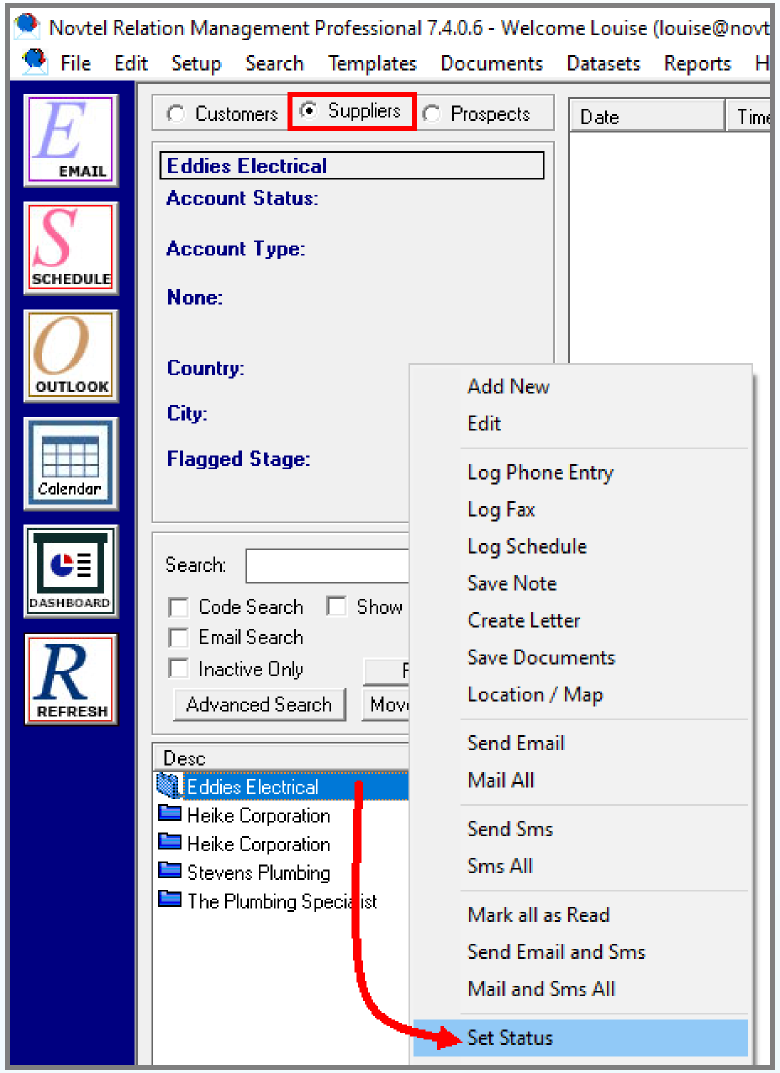
Now select the sub-status to be linked to the second and 3rd main statuses and click ‘Accept’ to save the changes.



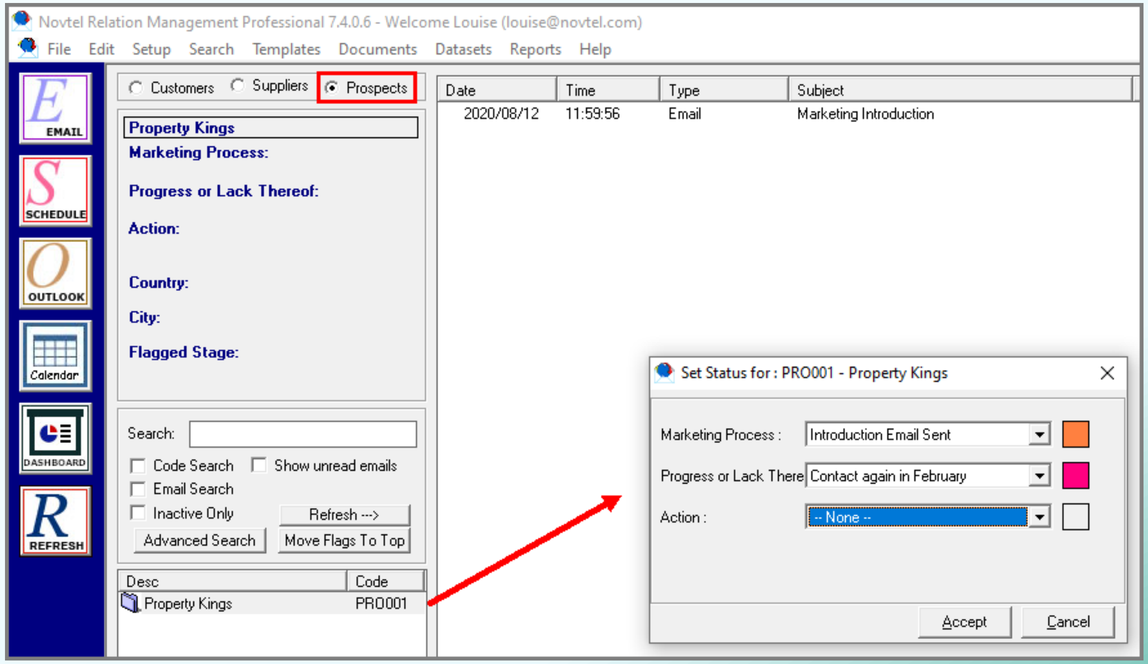
The main screen will now display the following information when this account is selected:

1. The Account Status is ‘Newly Added’.
2. The Account Progress states that we are awaiting payment.
3. And the contract expiry date is open ended at present.

Setting Statuses to an Account



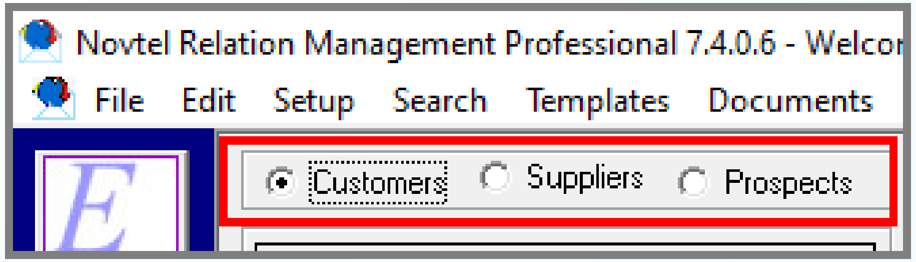
To set statuses on Supplier and Prospect Accounts, either the ‘Suppliers’ or ‘Prospects’ option must be selected; The account right-clicked; and the status set as required.



6

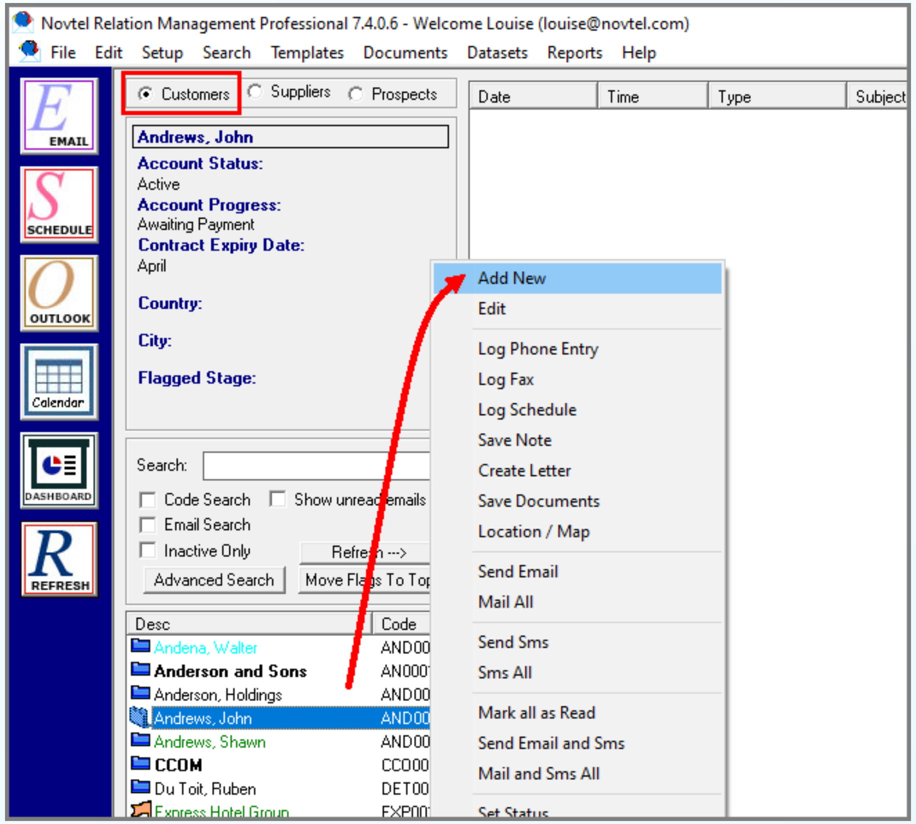
Creating Customer / Supplier / Prospect Master Files

Creating Customer / Supplier / Prospect Master Files



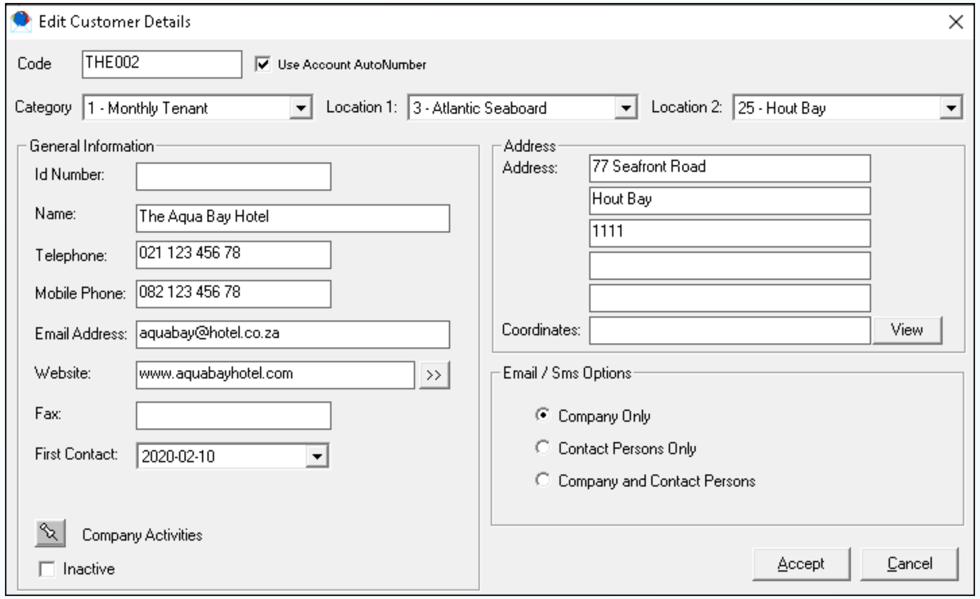
Customer, Supplier and Prospect Accounts are created in the exact same manner.

Depending on the selection at the top of the window, the account will be created and listed in the corresponding window.



In this case, we will create a Customer Account by clicking anywhere in the section here and selecting ‘Add New’.

Creating Customer / Supplier / Prospect Master Files

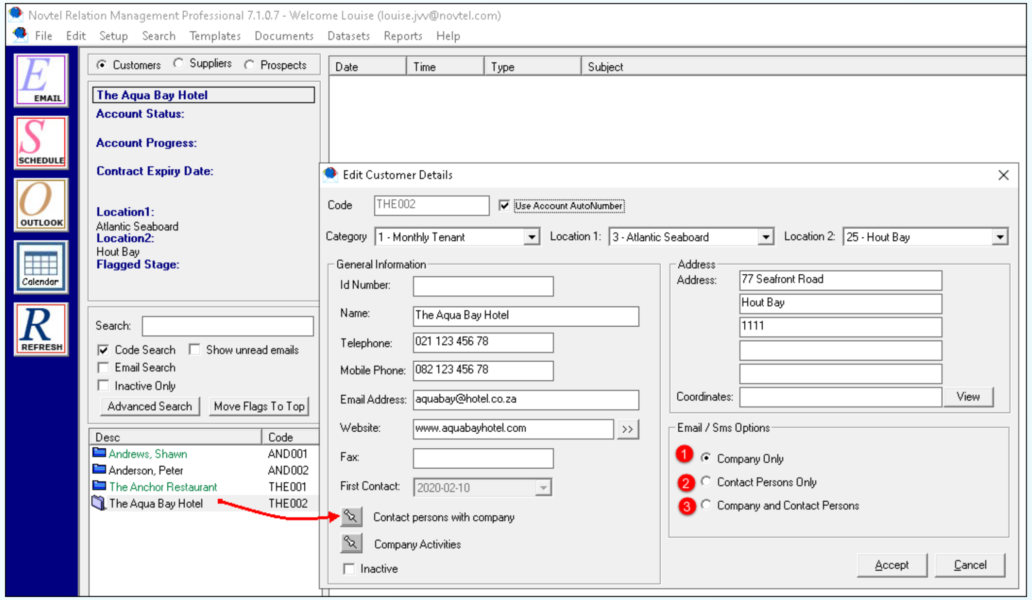


In this window, a unique account code and name is to be created.

The pre-created category and locations relevant to this Account, are to be selected.

Ensure that the correct email address and mobile number is entered since it will be used in email and / or SMS communications directly from Novtel.

All other information must be entered too before clicking 'Accept'.



Once saved, the Account can be accessed by simply double clicking on it.

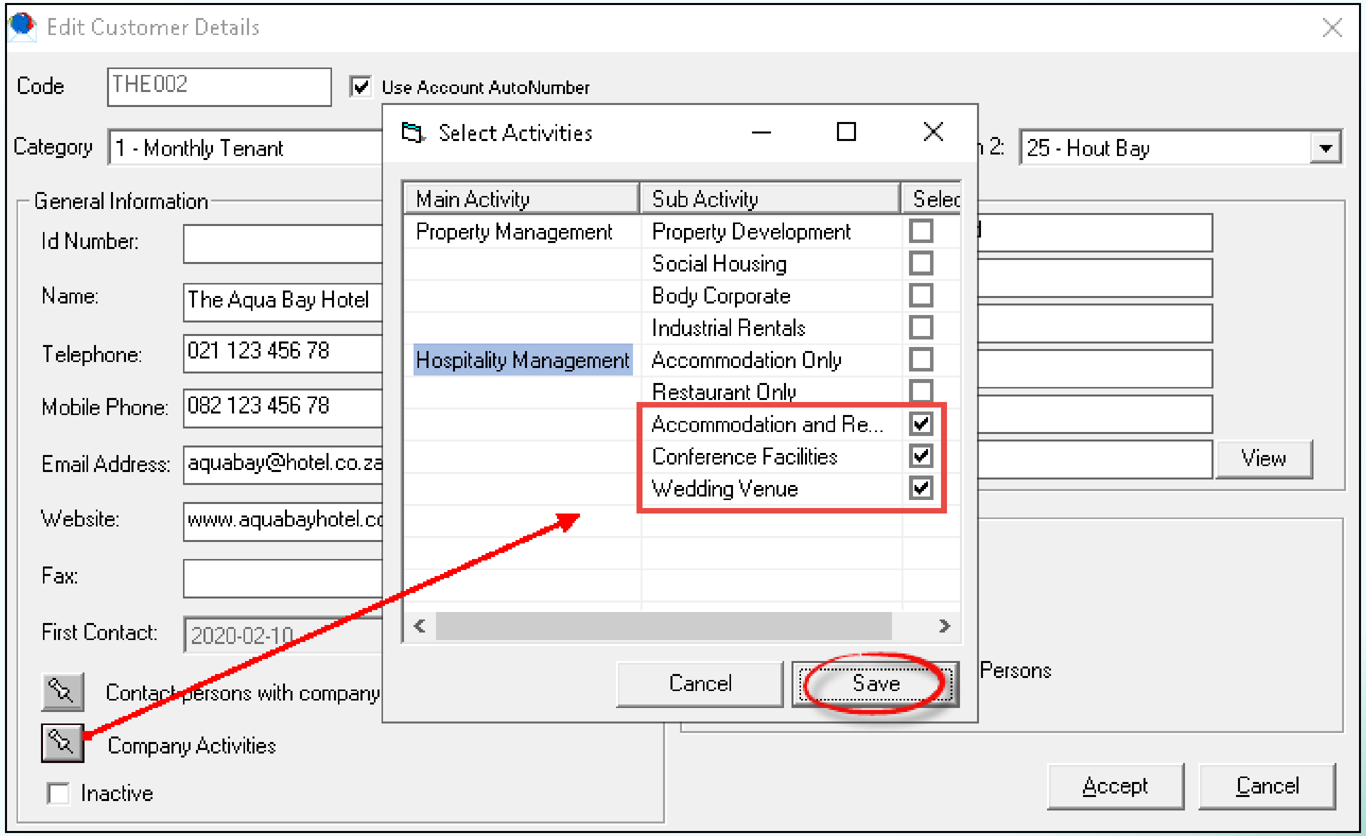
The 'Contact persons with company' option is now activated, and additional contact persons can be added to this account.

Email and SMS communications can then either be sent to:

1. The Company Only (The details entered on the main screen)
2. Contact Persons Only (The details entered in the 'Additional Information' screen)
3. Or the Company and Contact Persons

Creating Customer / Supplier / Prospect Master Files

If set up, the ‘Company Activities’ relevant to the selected Account can be selected, which can be used to filter Accounts linked to the same activities for the purpose of sending a bulk email or SMS to all listed accounts simultaneously.

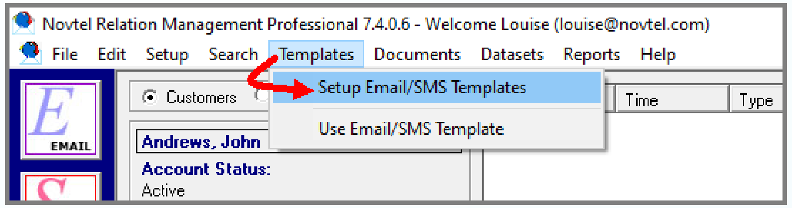


Relations Management

7

Email and SMS Templates

Email and SMS Templates

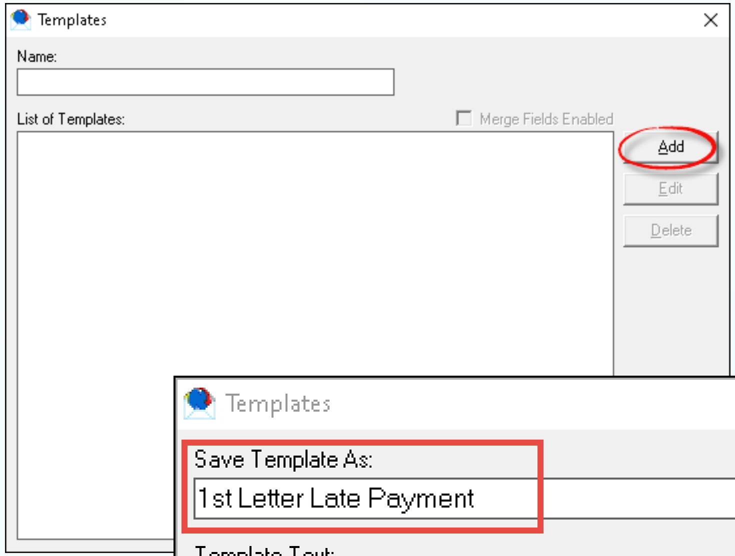


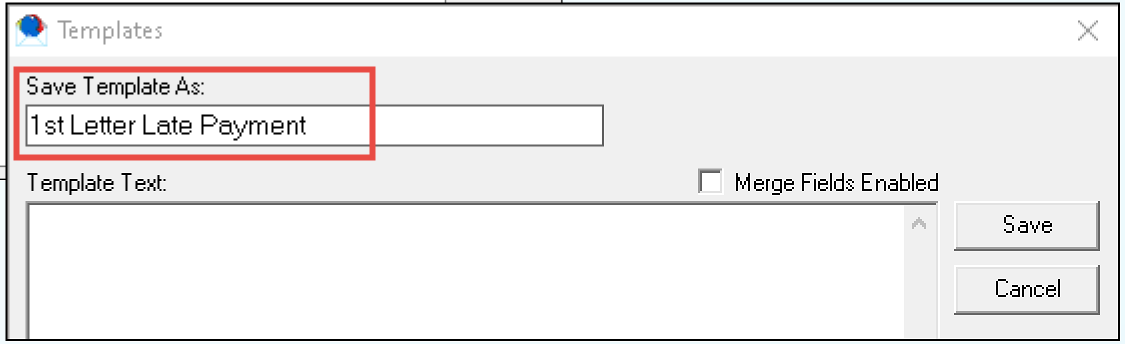
Email Templates

An unlimited number of email and SMS templates can be set up in Novtel to send a customized email or SMS to a single email address or mobile number, or to multiple email addresses or mobile numbers simultaneously.

From the ‘Templates menu option, the ‘Setup Email / SMS Templates’ option is selected.

In the ‘Templates’ window, the ‘Add’ button is selected.

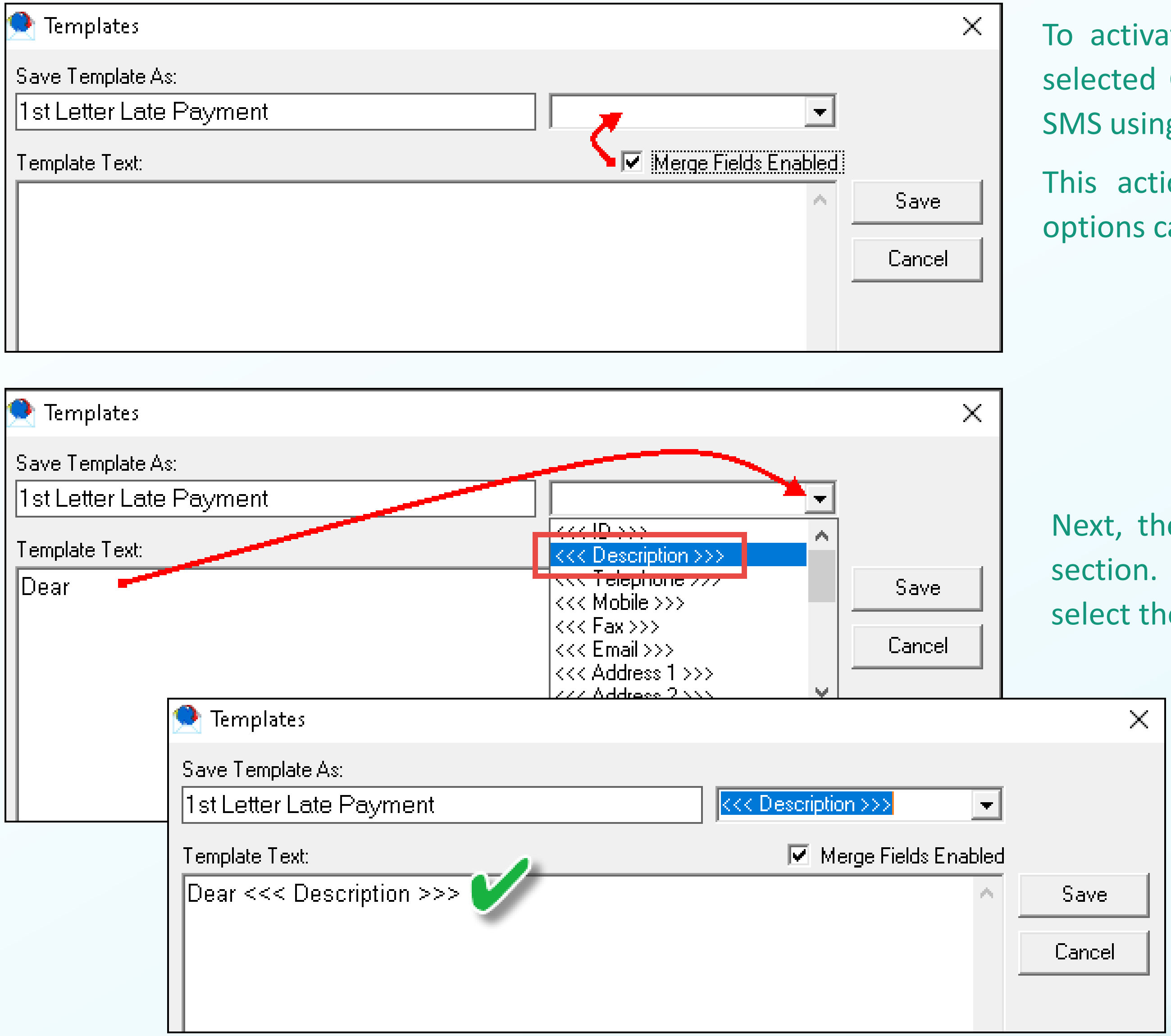




Enter a unique name for this template which will easily be distinguishable when searching for the applicable template to use it when sending either an Email or SMS.

This description entered here, will also automatically be displayed as the Email or SMS Subject.

Email and SMS Templates



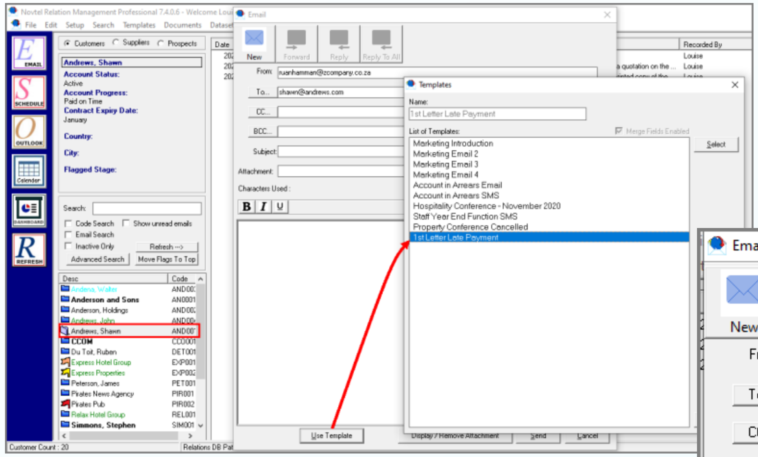
To activate the option to insert customized information for each selected Customer; Supplier or Prospect when sending an Email or SMS using a Template, tick the ‘Merge Fields Enabled’ checkbox.

This action immediately activates the field from where specific options can be selected to insert on the Template.

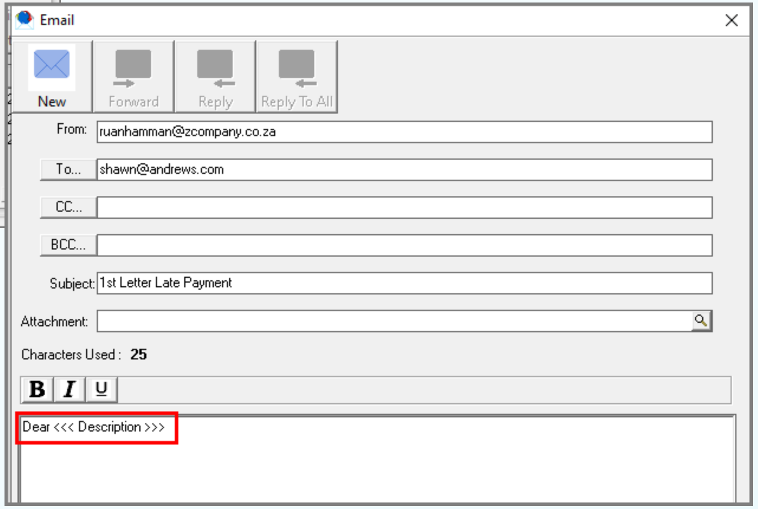
Next, the required message can be added to the ‘Template Text’ section. In this case, we will first enter the wording ‘Dear’ and the select the <<<Description>>> option from the Merged Fields menu.

This merged option is now inserted here.

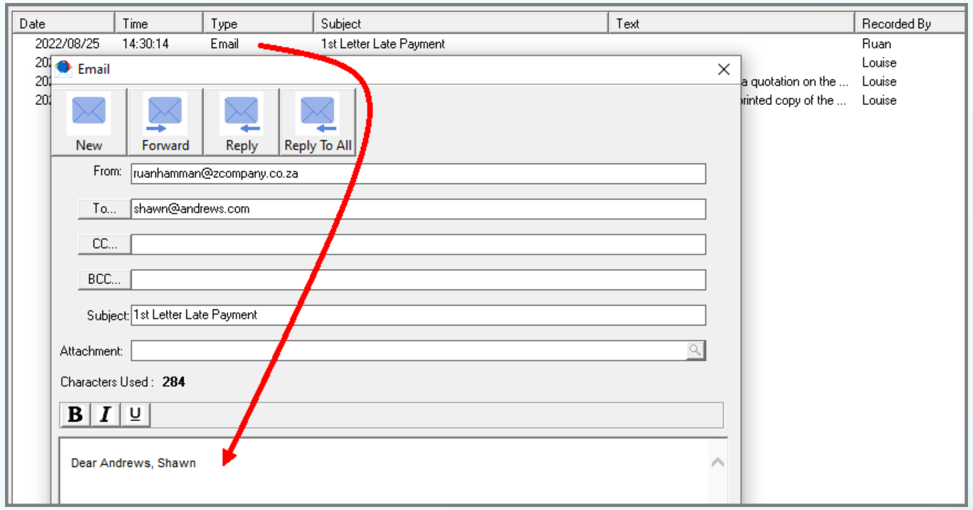
Email and SMS Templates



For demonstration purposes, we will now save the template and demonstrate the effect of this selected when an email is sent to Mr Andrews, using this template.

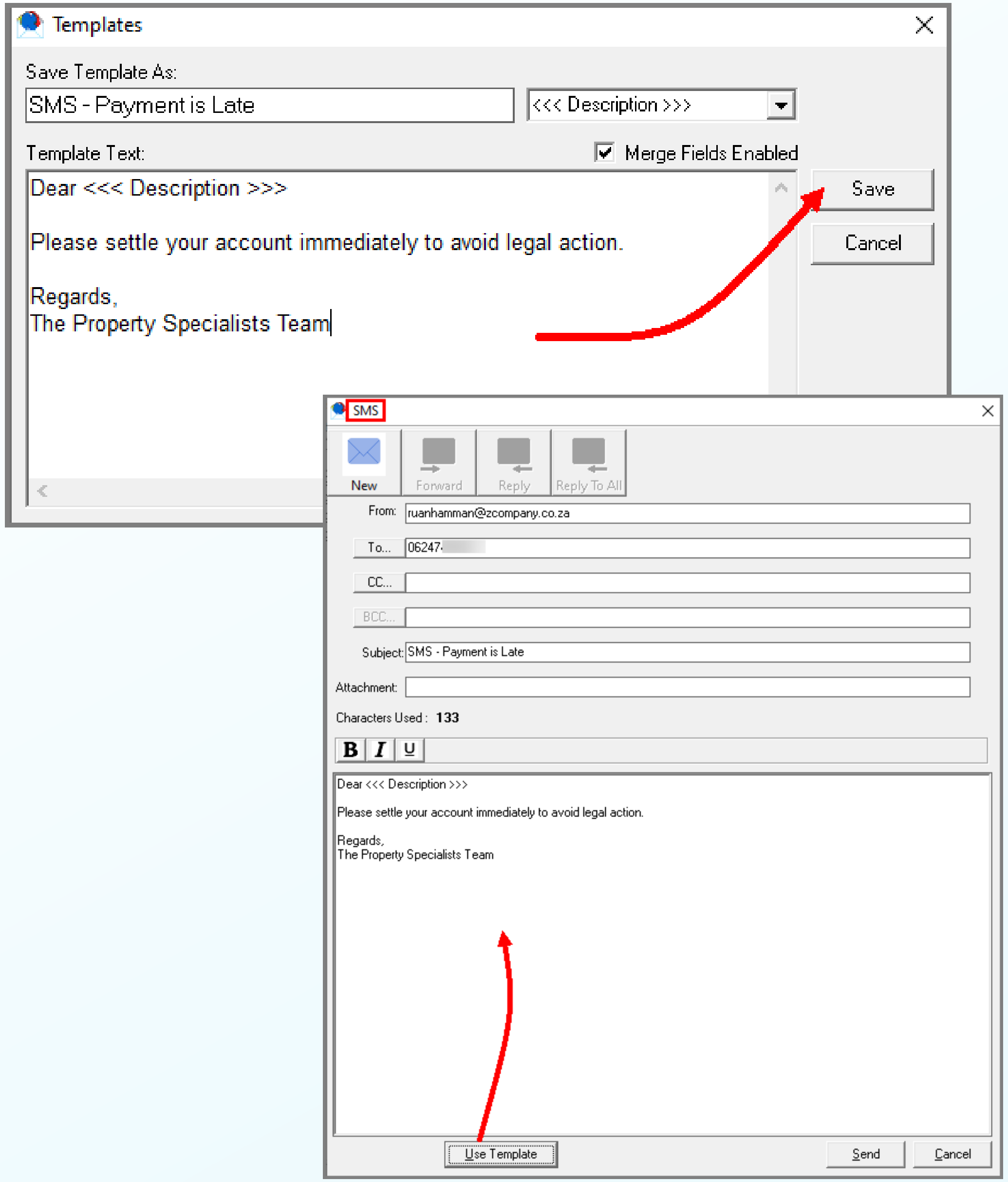


On the new Email form, the Account will not yet be listed, and will be displayed as 'Dear <<<Description>>>.'



However: When the email is sent and is accessed afterwards, it displays the Account Description correctly as captured to the Master File.

Email and SMS Templates



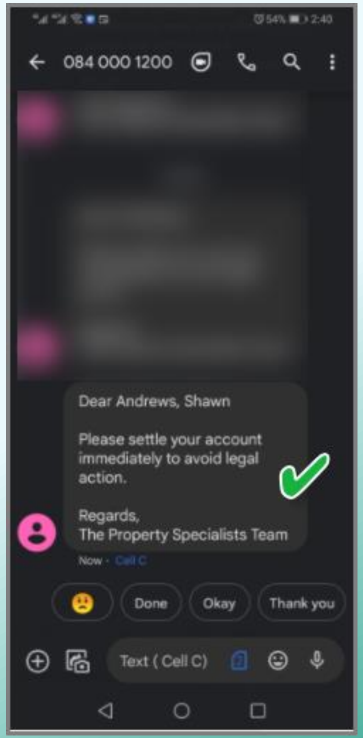
SMS Templates

SMS templates are created in the exact same manner, and the same principles apply.

However: Please note that SMS Templates cannot exceed more than 160 characters.

To send an SMS to the cell-phone number linked to the master file, you must have SMS credits – which can be obtained from Novtel.

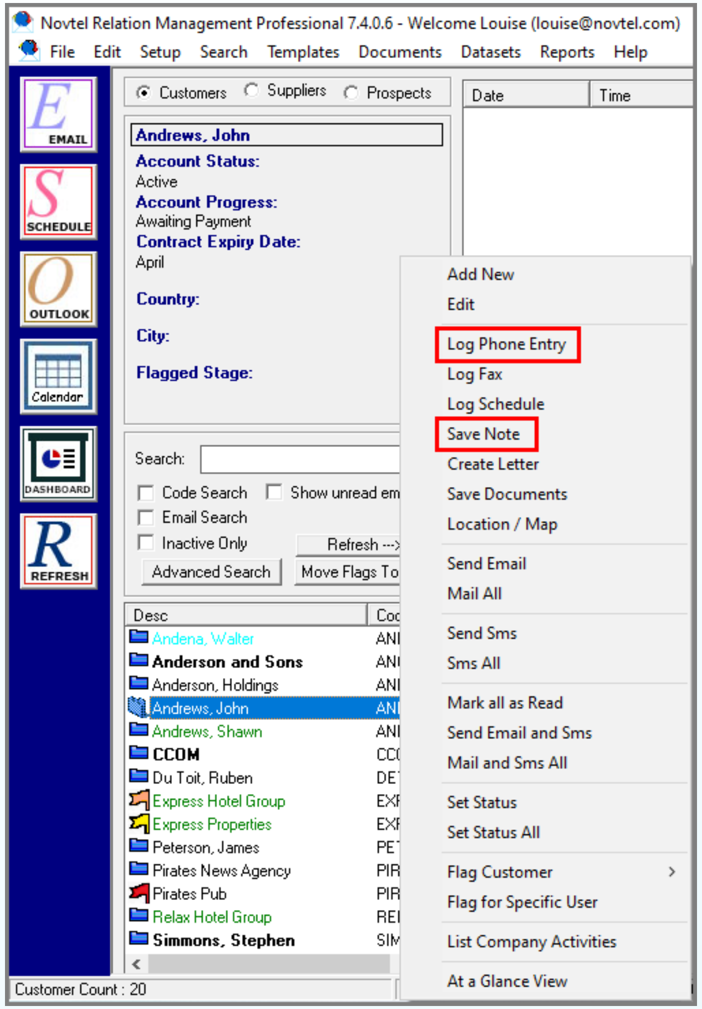
The SMS will then be received by the recipient as follows:



8

Saving Notes and Logging Phone Entries

Saving Notes and Logging Phone Entries

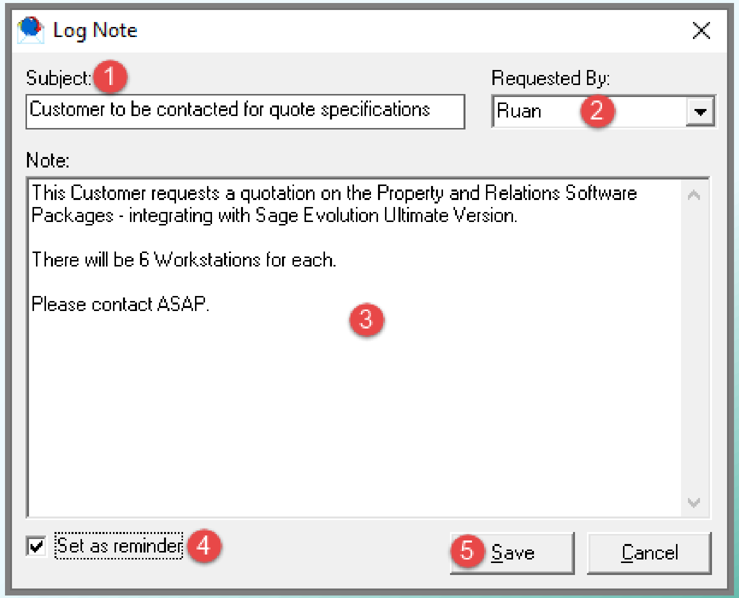


The principles for logging a phone entry and saving notes are exactly the same.

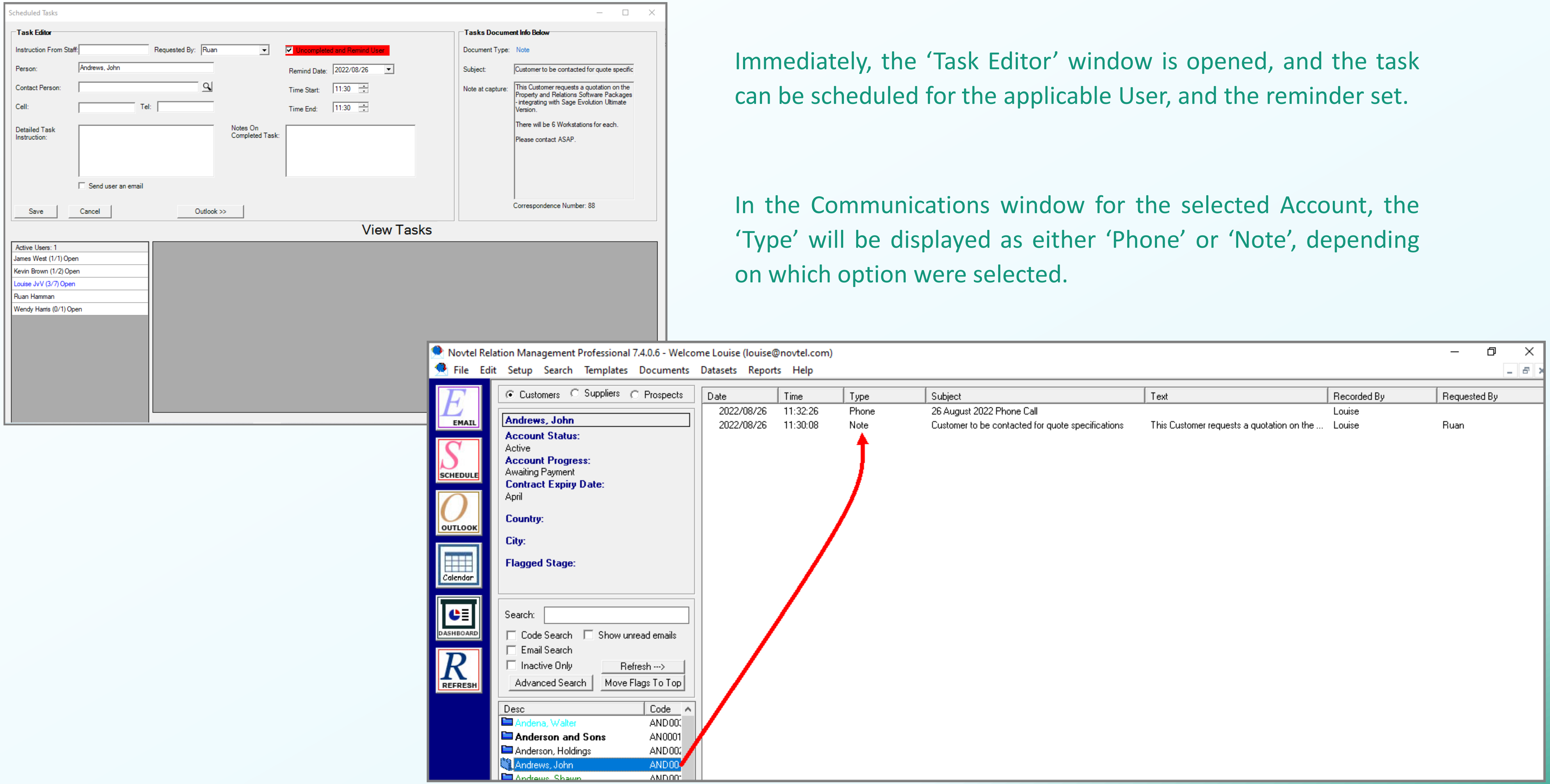
In addition: a reminder can be set, and a task scheduled for a specific User to act.

First right click on the Account and either select the ‘Save Note’ or ‘Log Phone Entry’ option.

1. A subject must be entered to quickly find it on the selected Account.
2. The Novtel User requesting the action is selected from the list.
3. Now enter a detailed note or conversation in this field.
4. Should you wish to schedule a task and set a reminder, ensure that the ‘Set as Reminder’ checkbox is ticked.
5. Click ‘Save’ to continue.



Saving Notes and Logging Phone Entries



Immediately, the ‘Task Editor’ window is opened, and the task can be scheduled for the applicable User, and the reminder set.

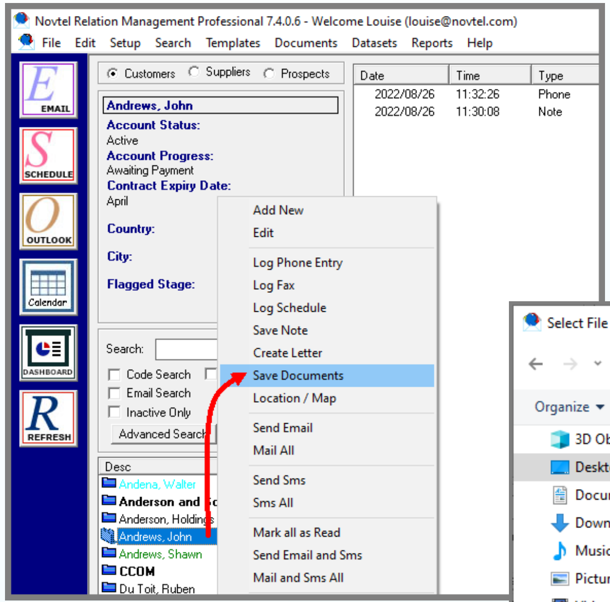
In the Communications window for the selected Account, the ‘Type’ will be displayed as either ‘Phone’ or ‘Note’, depending on which option were selected.

Novtel® Relations Management

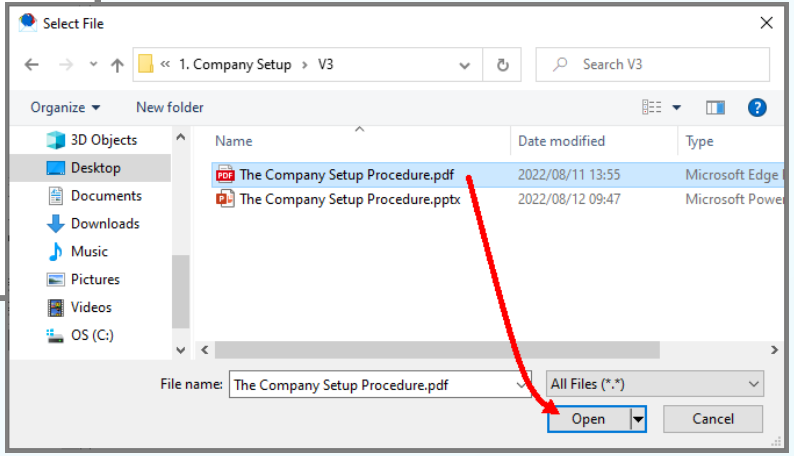
9

Saving Documents

Saving Documents

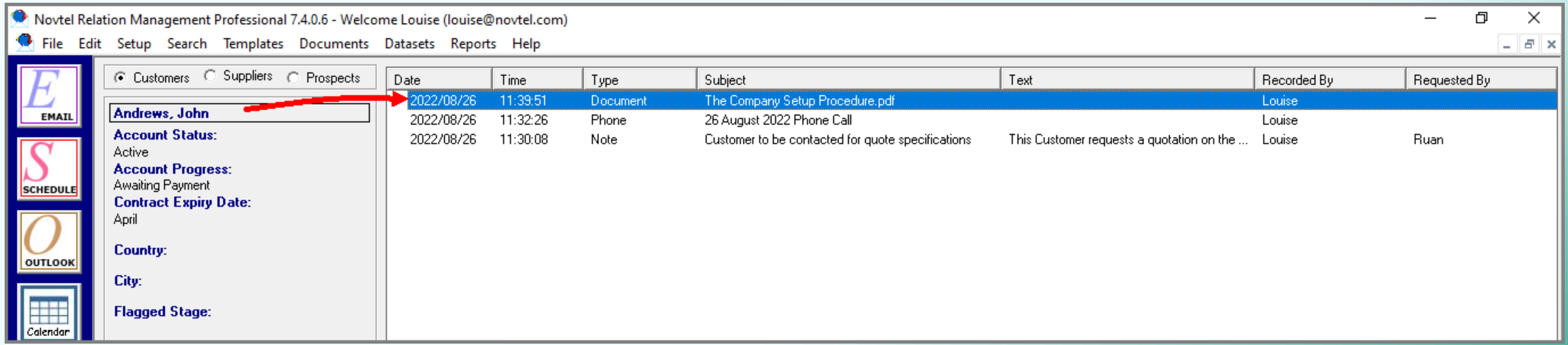


Documents – such as contracts or any other relevant files - can also be saved individually by right-clicking on the applicable Account and selecting the 'Save Documents' option.



Immediately, the 'Select File' window is opened, and the applicable file can be searched for and selected.

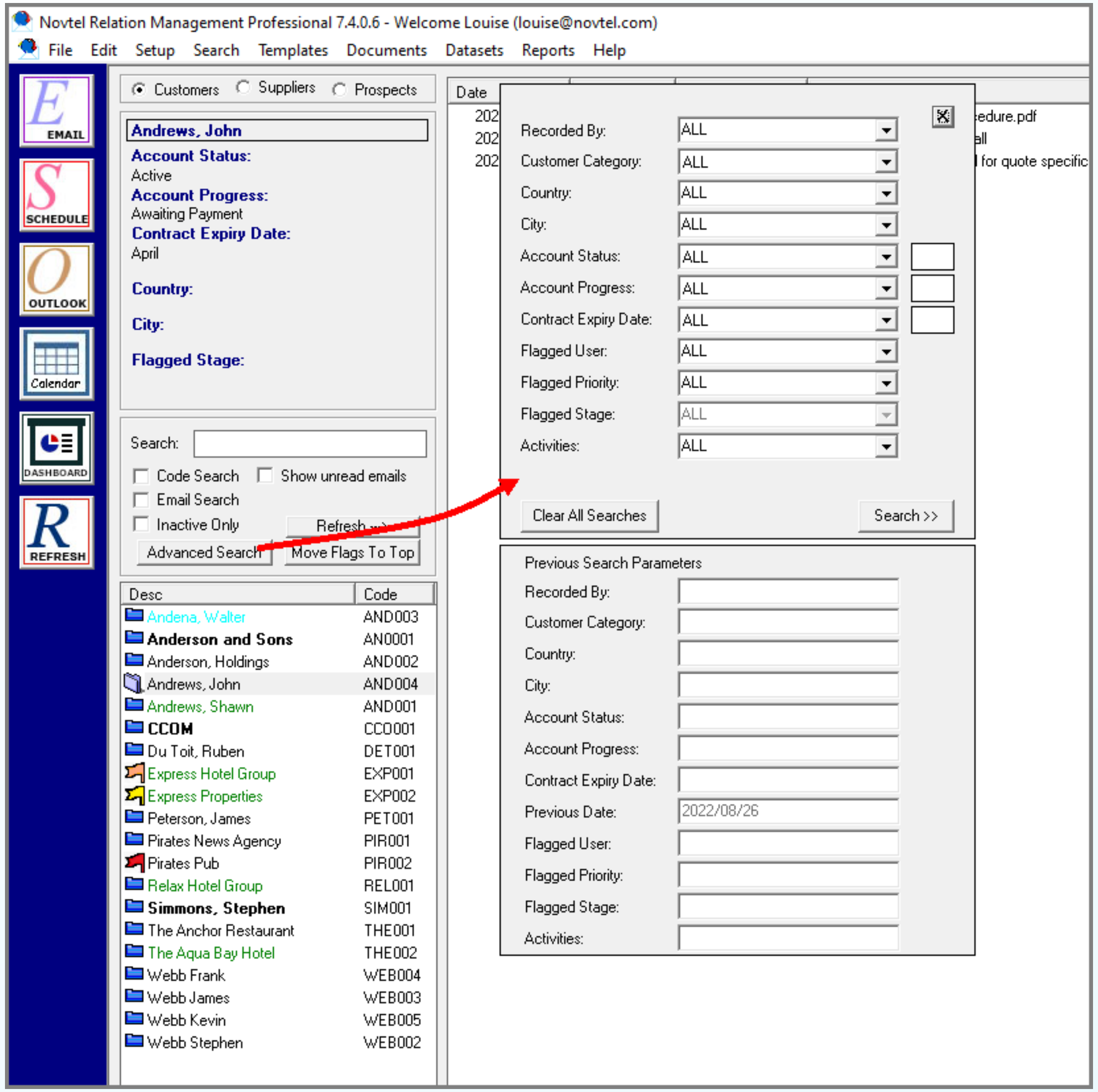
The document name will be displayed in the Account's Communications section and can be opened directly from this screen by double clicking on the line.



10

Advanced and Other Searches

Advanced and Other Searches



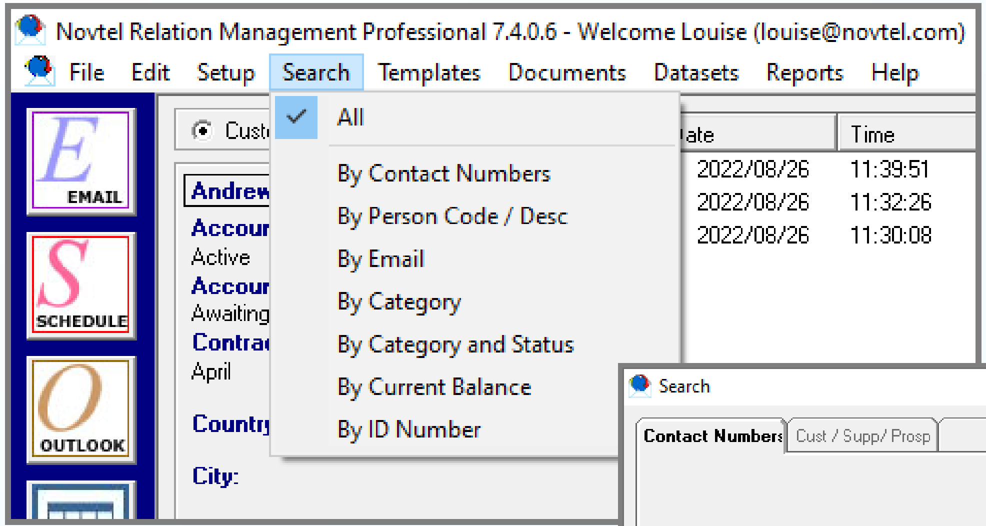
There are various search methods to be used in Novtel Relations to achieve the desired results, namely:

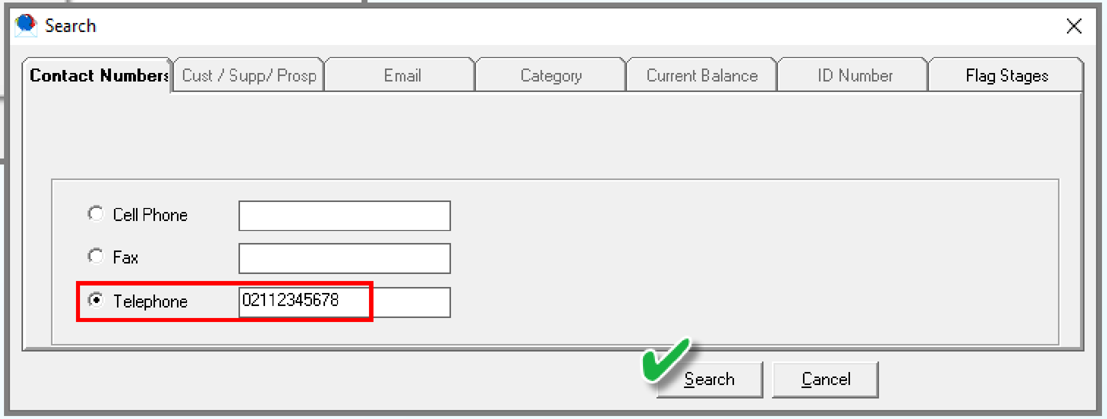
Advanced Searches

Clicking on the ‘Advanced Search’ button, the User can search for the following information as linked to a Customer, Supplier or Prospect Master File:

- ✓ Accounts recorded by a specific User
- ✓ The Category the Account is linked to
- ✓ The specific location where the Customer; Supplier or Prospect is situated (Either Country and City, or the Customized locations as set up and selected)
- ✓ Sub-Statuses as linked to the 3 main statuses
- ✓ Users flagged for a specific task
- ✓ Flagged priority and stage
- ✓ And Activities the Account is linked to

Advanced and Other Searches



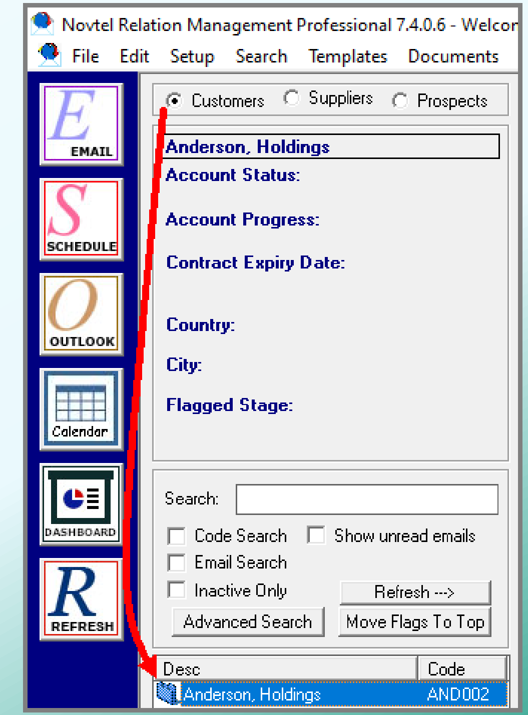


The Search Menu

From the 'Search' menu, various search options are available.

For demonstration purposes, we have selected the 'Contact Numbers' option; selected the 'Telephone' option and entered this telephone number before clicking 'Search'.

The account this telephone number was found to be linked to, is displayed here.



Advanced and Other Searches

The Main Screen

Account Code Search

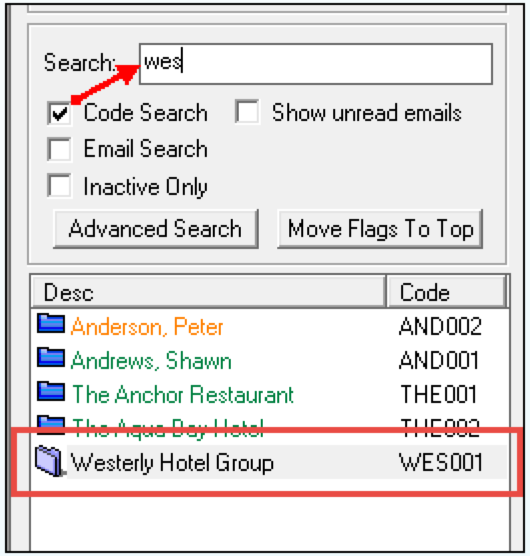
By ticking the ‘Code Search’ option and entering an Account code – or part thereof – in the search field, the Account will be highlighted in a faint grey line when matched.

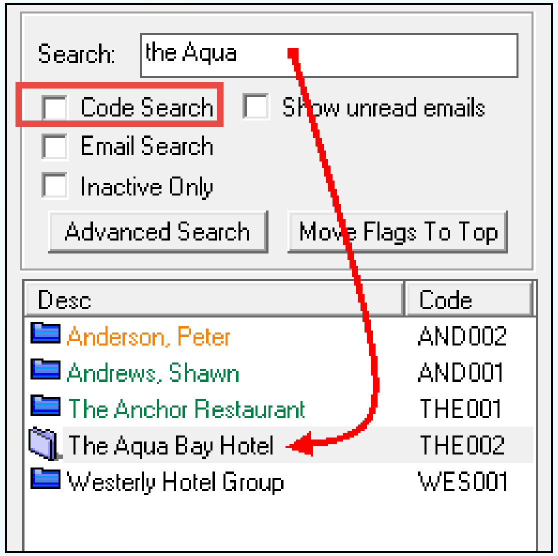
Account Description Search

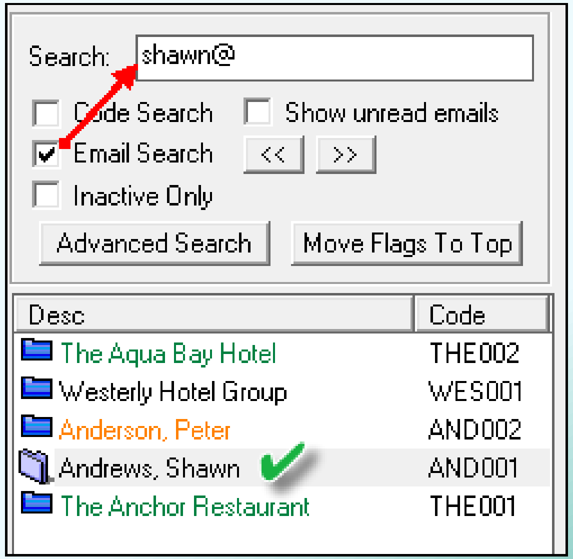
If the ‘Code Search’ checkbox is unticked, the Account description – or part thereof - can be entered here and Novtel will highlight the matched account.

Email Search

Ticking the ‘Email Search’ checkbox and entering the email address – or part thereof – in the search field, the account the email address is captured to, is matched by Novtel.







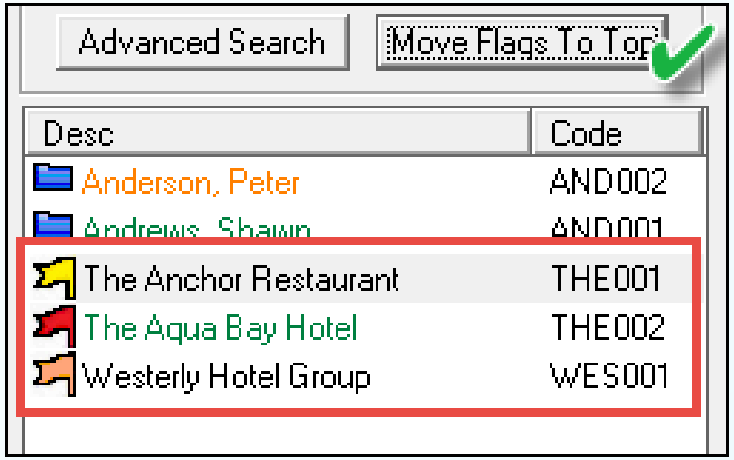
11. Using Flags

Using Flags

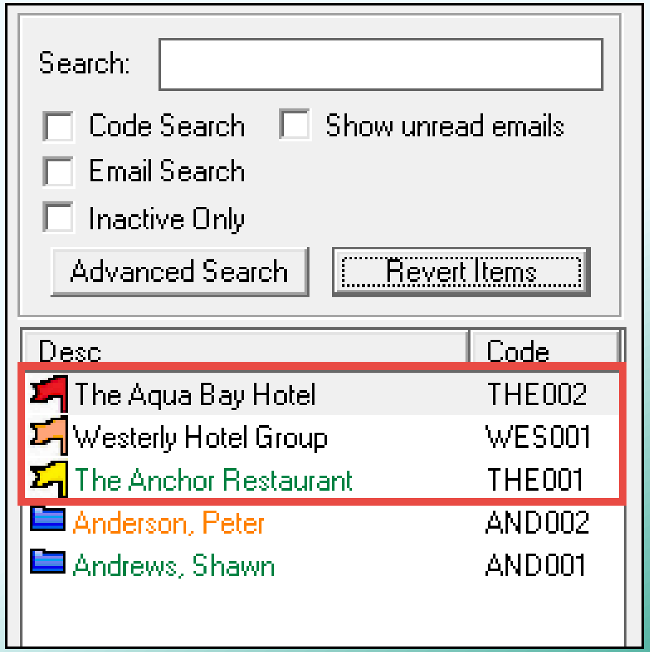
Accounts can be flagged; a specific priority level set, and a note can be captured to accompany the flag.

Three priority levels are available for selection, and the flag for each are specifically colour coded for the User to immediately identify the most urgent flags.

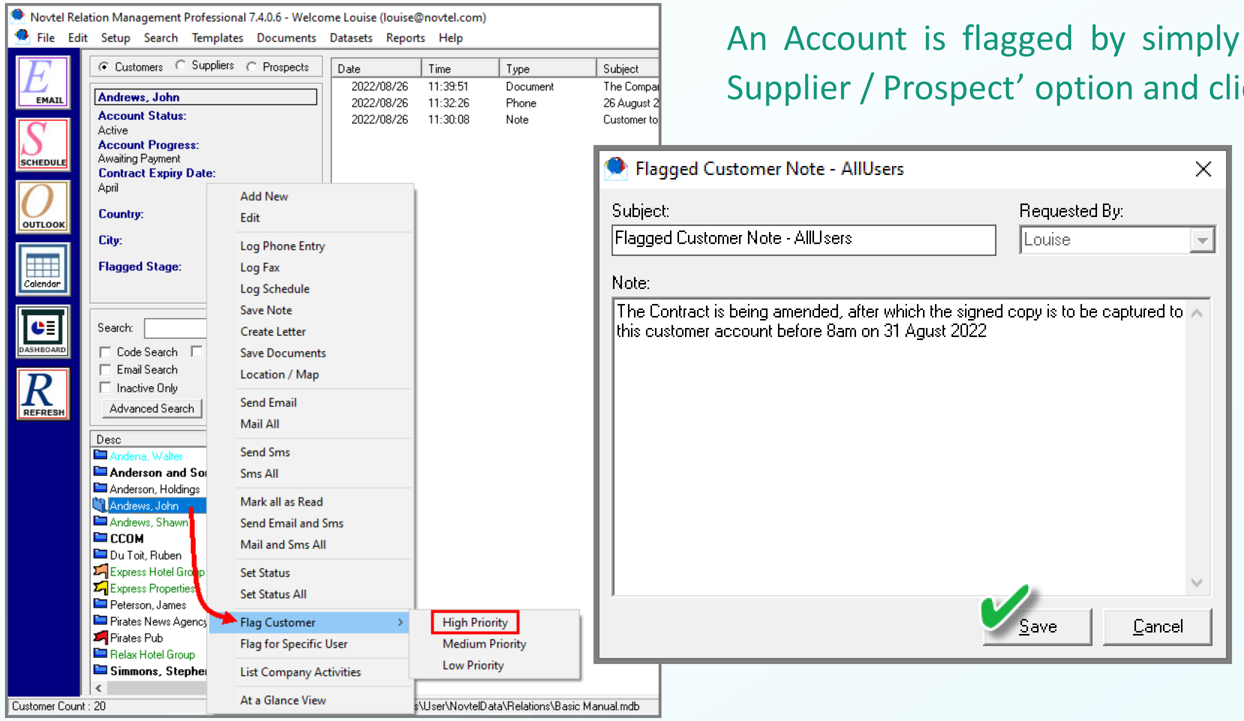
- ✓ High Priority - Red flag
- ✓ Medium Priority – Orange flag
- ✓ Low Priority – Yellow flag



Clicking on the 'Move Flags to the Top' button, the flagged accounts are moved to the top of the Accounts section, and in order of the highest priority first.



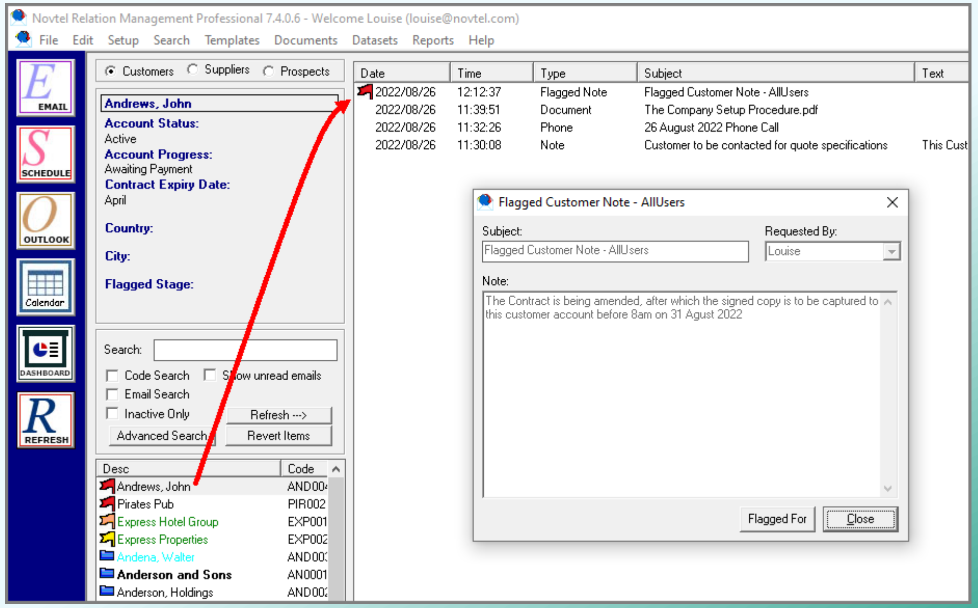
Using Flags



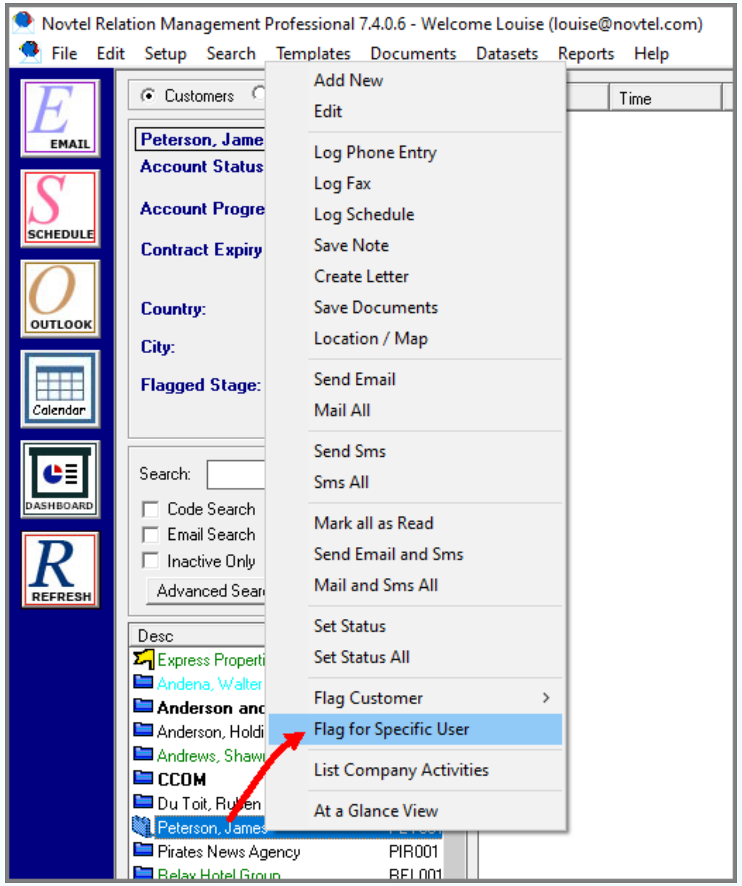
An Account is flagged by simply right clicking on it; selecting the ‘Flag Customer / Supplier / Prospect’ option and clicking on the applicable priority level.

A Note to accompany the Flag can now be captured and saved.

The Account is now flagged, and the note can be accessed by double clicking on it.



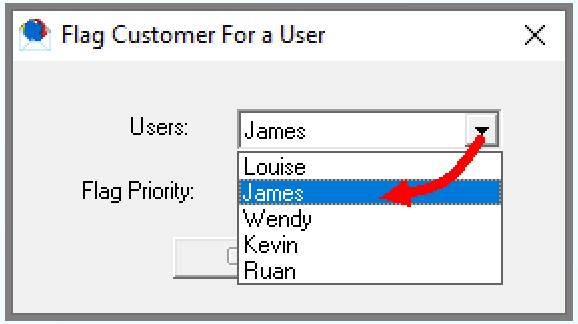
Using Flags



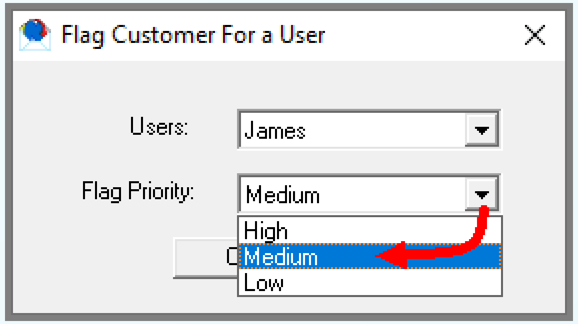
Flagging an Account for a Specific User

Accounts can also be flagged for a specific User who will be responsible for taking the required action.

Right-click on the account and select the 'Flag for Specific User' option.



First select the User for whom the Account is to be flagged.



Then set the priority level before clicking 'OK'.

A note can now be captured for the User to take action.

Only the User for whom the Account was flagged, will see the flag when logging into Novtel with their credentials.

Novtel® Relations Management

12. The Scheduling System

The Scheduling System

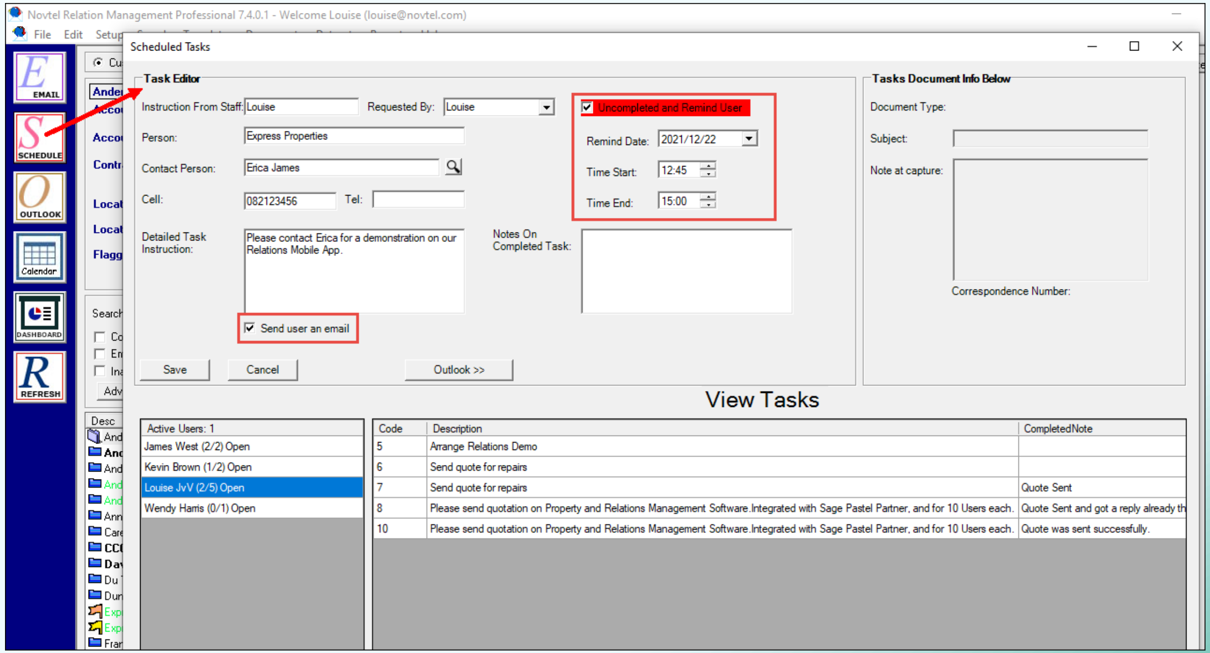
Novtel Relations Management incorporates a complete Scheduling system whereby:

1. An email can immediately be sent to the applicable Novtel User’s Microsoft Outlook account when a task is scheduled for them.
2. The ‘Scheduled Tasks’ screen will pop up on the set date and time to indicate that a task was assigned to the logged in User.
3. A Microsoft Outlook reminder will be created and will pop up to remind the User – who has scheduled the task – of the action to be taken.
4. The scheduled tasks will be visible in the User’s Relations Calendar.
5. A User can either log a task for another User, or for themselves.

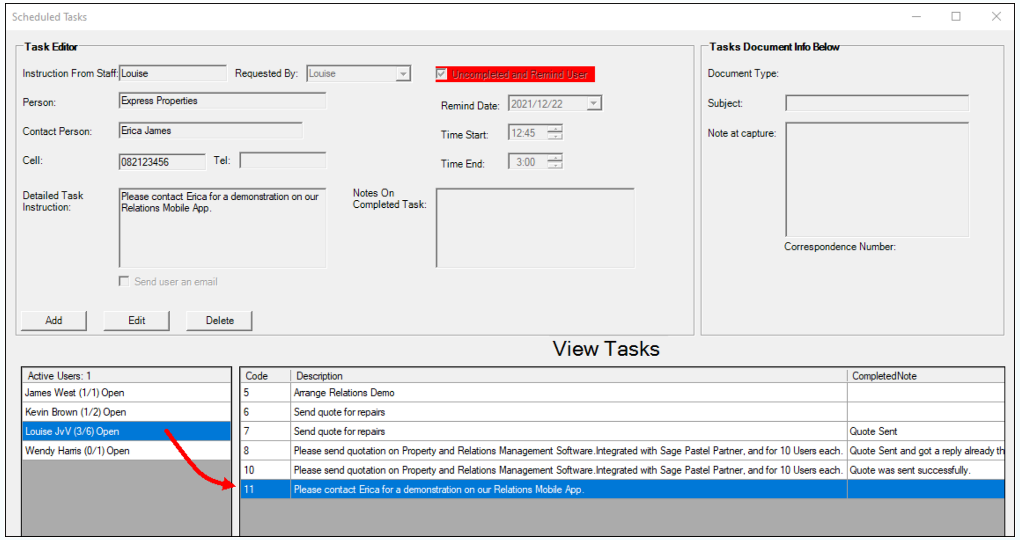
By clicking on the ‘Schedule’ icon, a new task can be scheduled.

An email can be sent to the User to alert them of a task scheduled for them, and the ‘Uncompleted and Remind User’ option is ticked.

The date upon which they must be reminded of the task is selected and the time by which the task must be completed upon the selected date, must be set.

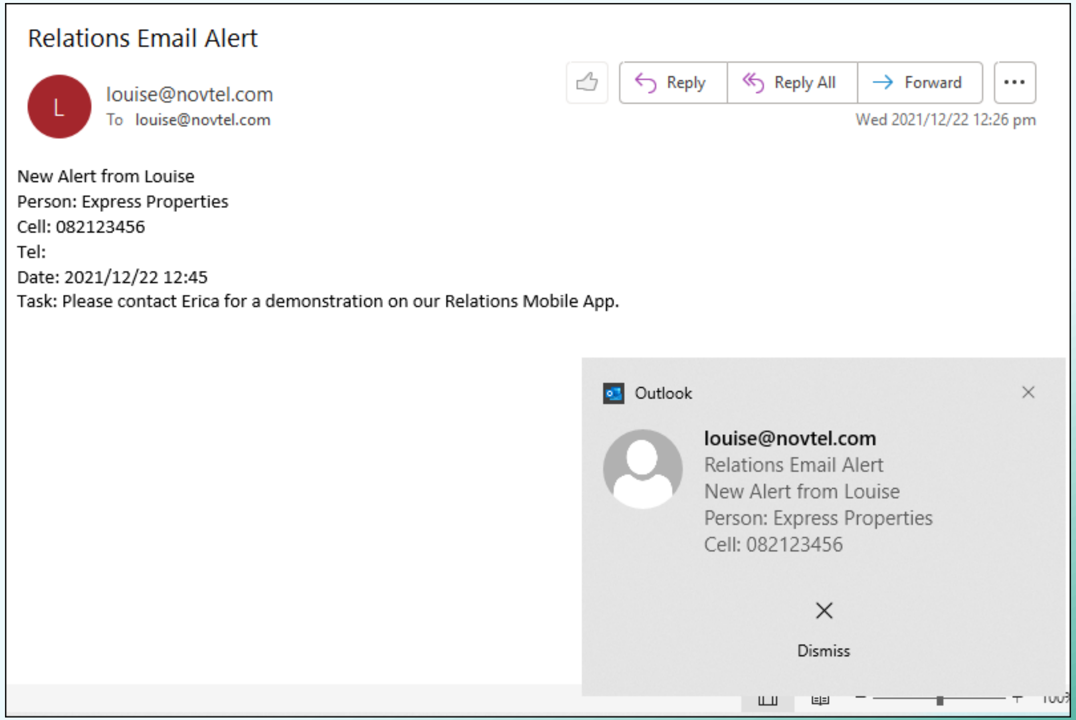


The Scheduling System

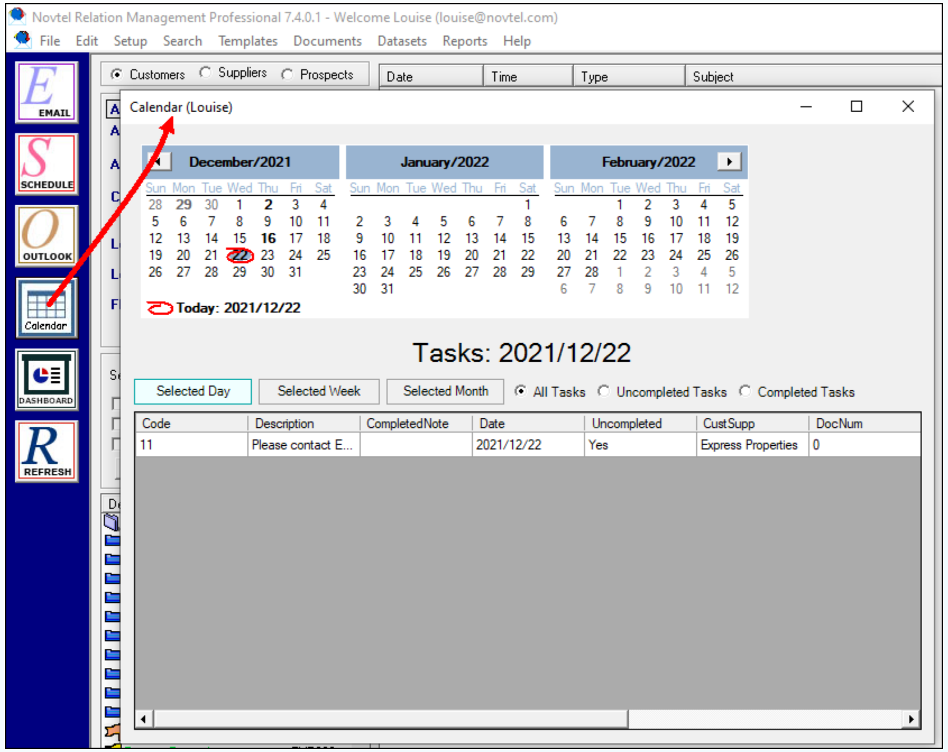


Upon saving the task, it will be displayed under the assigned User’s name.

An email alert is sent to the selected User, and is displayed as follows:



The Scheduling System

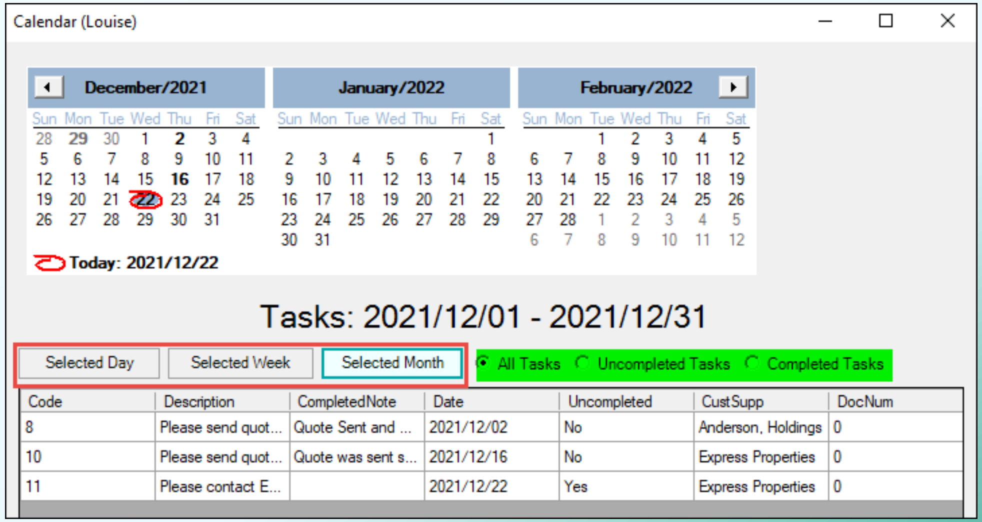


On the set time, the Scheduled Tasks window will pop up on the assigned User's screen, and they will now be responsible for completing the task when it is done.

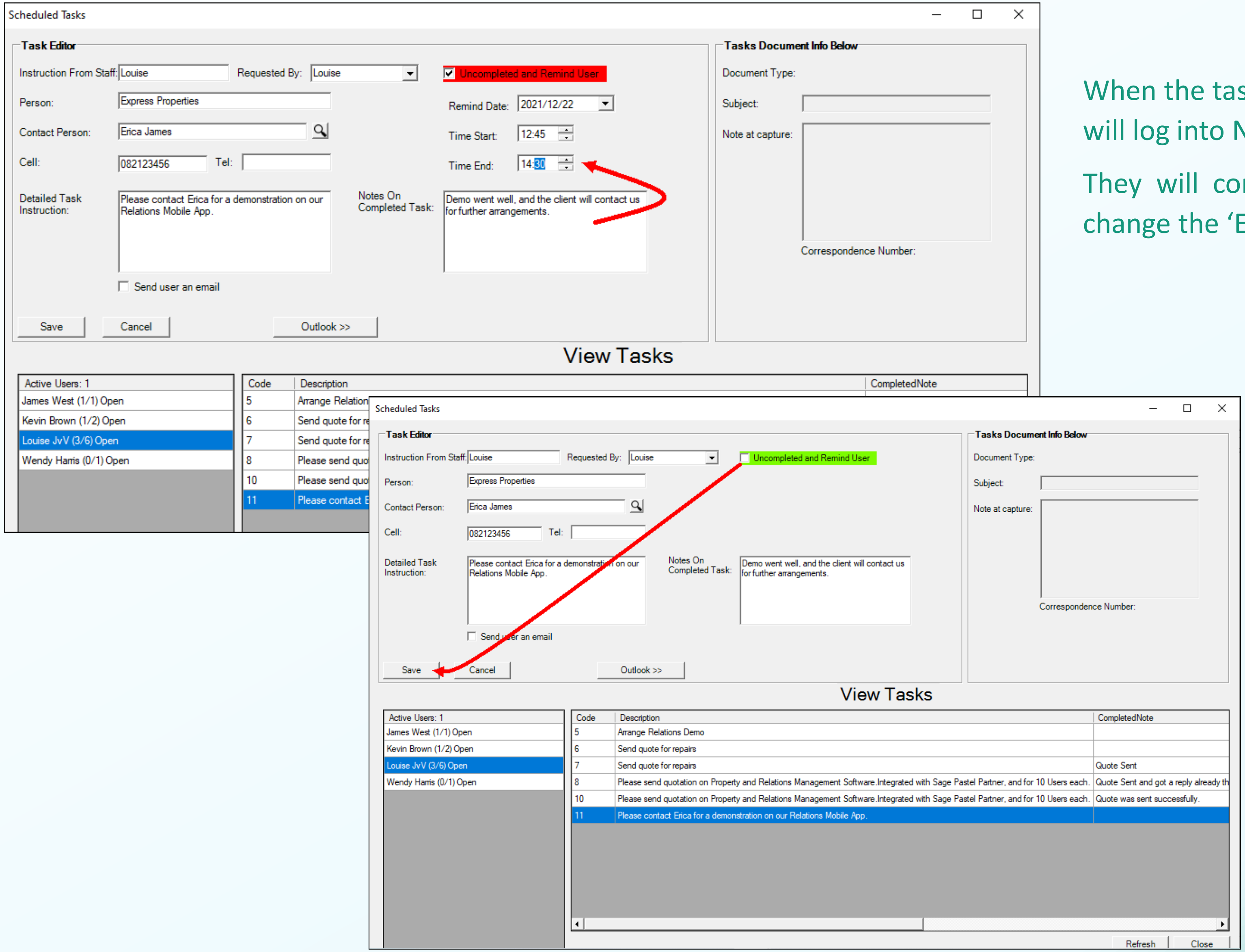
The Task will also be displayed when the User access their Calendar.

All Tasks, only Uncompleted Tasks, or only Completed Tasks can be viewed for a:

- ✓ Selected Day
- ✓ Selected Week
- ✓ Or selected Month



The Scheduling System

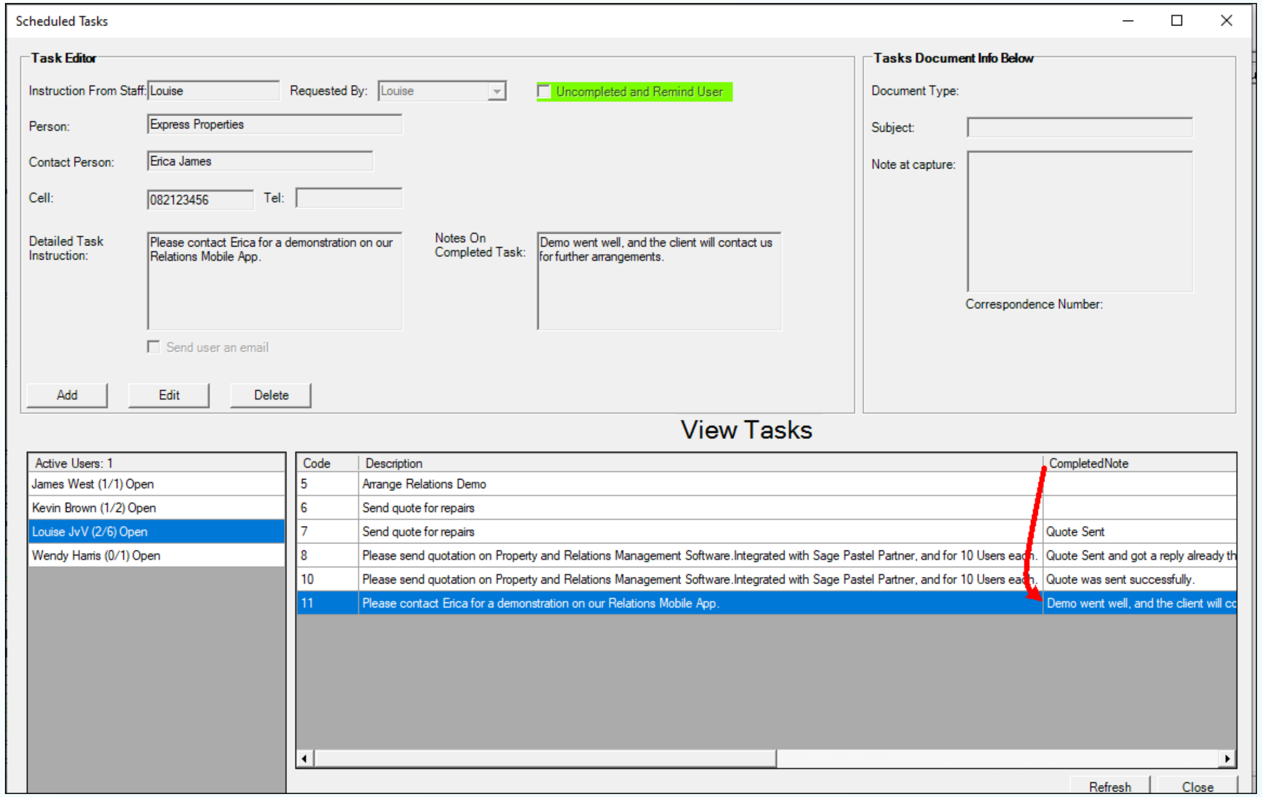


When the task is completed, the User to whom the task is assigned, will log into Novtel; Access the specific task and click 'Edit.

They will complete the section on how the task was done and change the 'End Time' to the exact time the task was completed.

The 'Uncomplete and Remind User' checkbox will now be unticked - which will turn the background of the wording green - and the changes are to be saved.

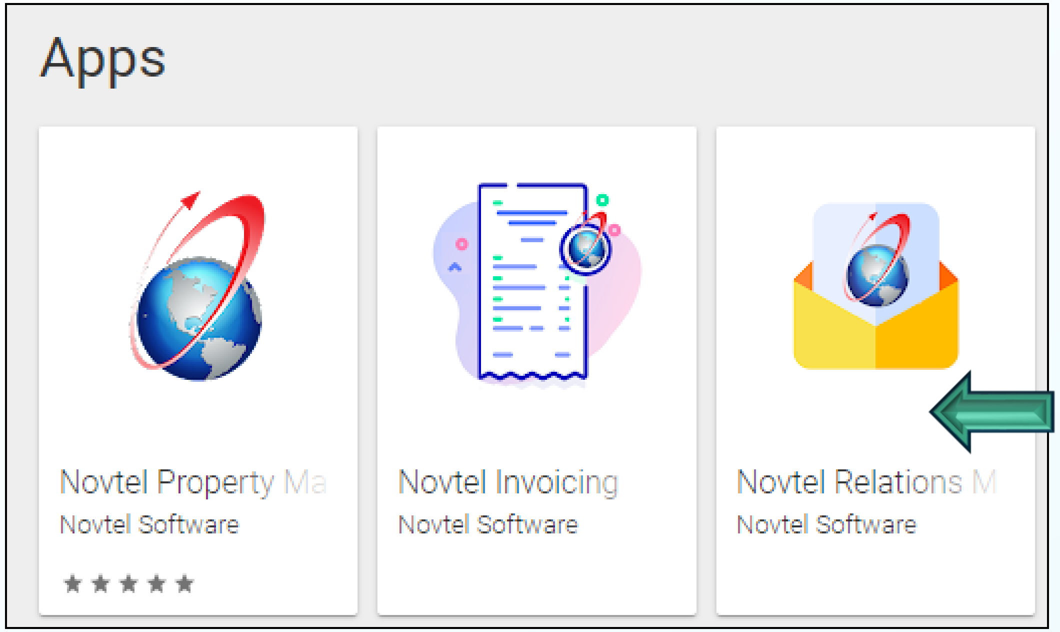
The Scheduling System



Since the task has been completed, the notes on how the task was completed, is displayed in the 'CompletedNote' column.

13. The Novtel Relations Management Mobile App

The Novtel Relations Management Mobile App



Download the Novtel Relations Mobile App here:

https://play.google.com/store/apps/details?id=za.co.novtel.novtelrelations

The app is available to both existing Novtel clients and any member of the public interested in Novtel Software. The demo user can simply download the app and test all features on the demo dataset - free of charge!

However: Please Note that Demo Users will only be able to contact Novtel Support from the demo database.

Google Maps integration:

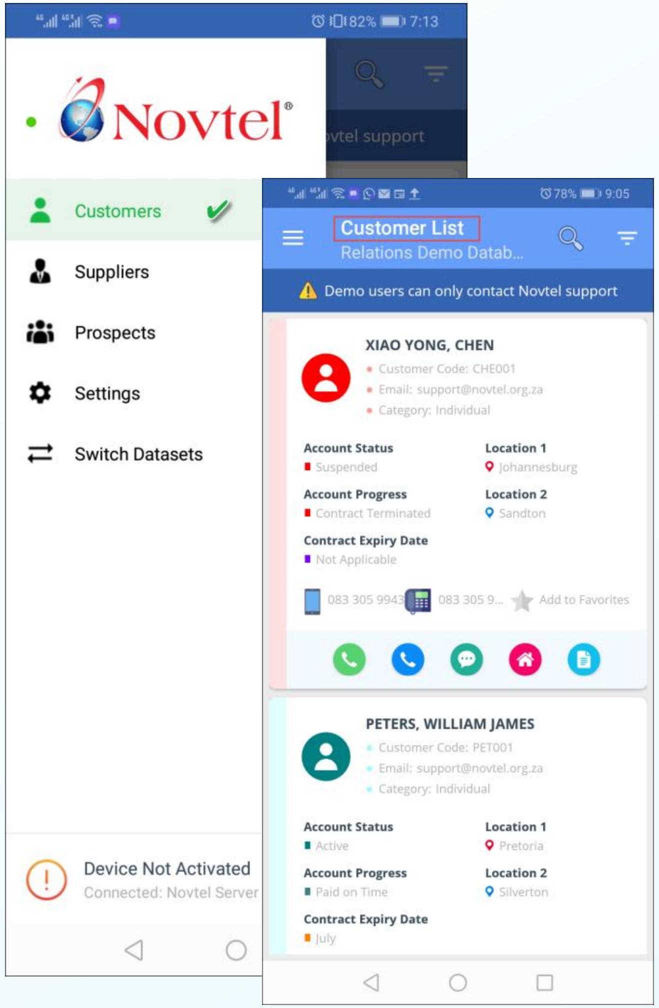
Easily view and navigate to your Novtel Prospects, and Sage Pastel or Sage Evolution Customer and Supplier addresses by setting a pin in Google Maps.

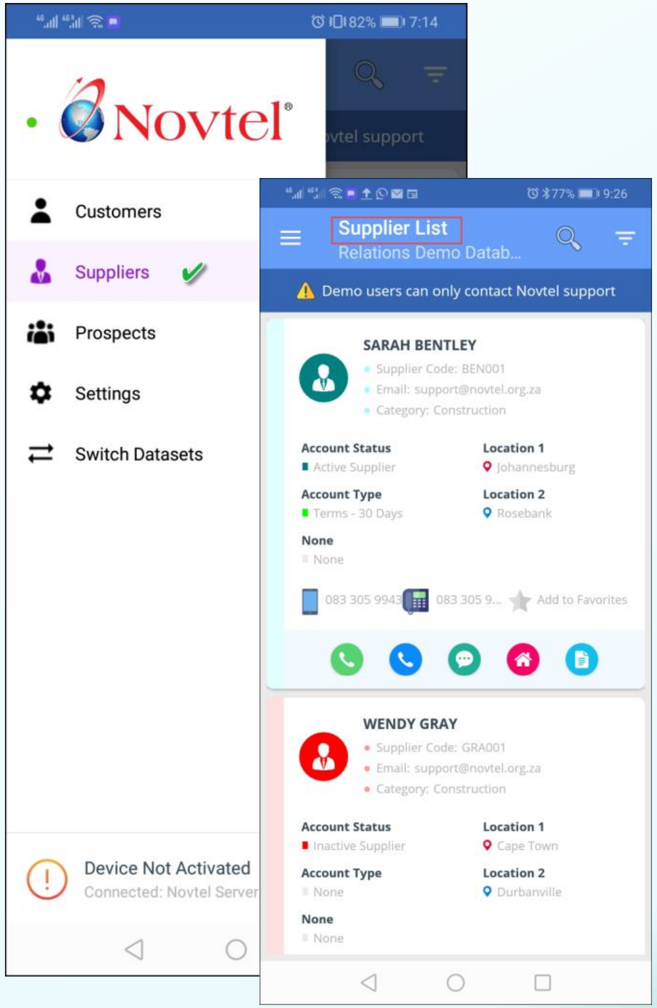
Multiple Dataset Processing:

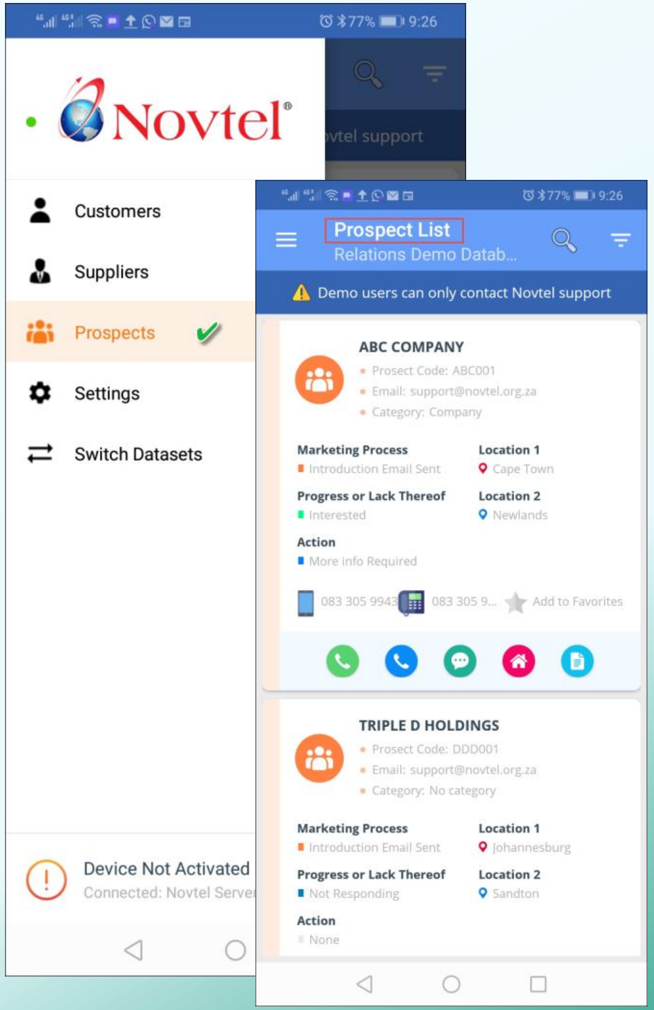
The app can display information from, and perform work in, any of the registered user's existing list of Novtel Relations datasets, making it quick and easy to manage correspondence on any dataset.

The Novtel Relations Management Mobile App

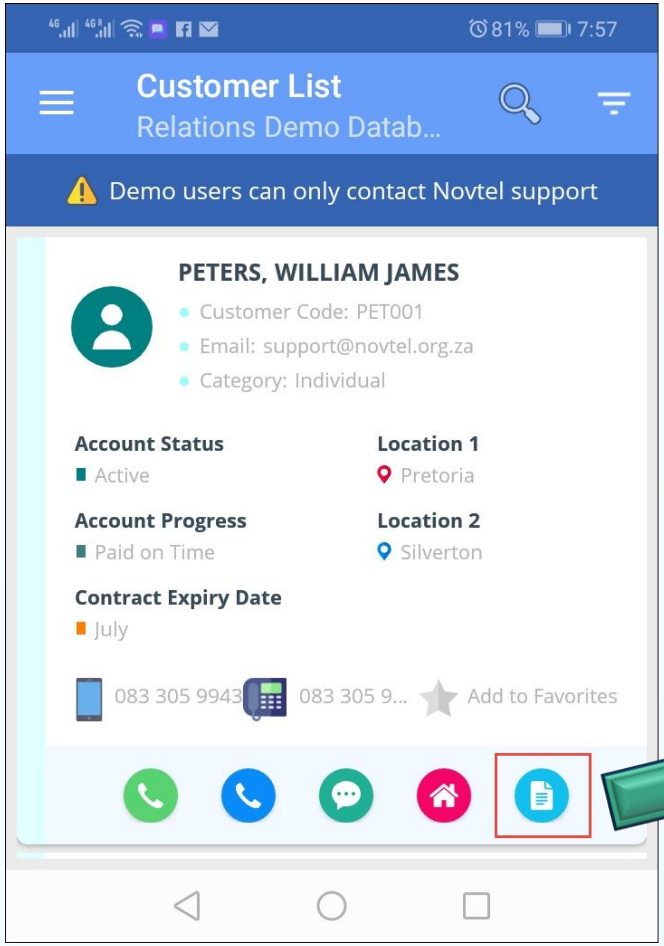
Customers, Suppliers and Prospect Accounts are accessed by clicking on the respective option here.





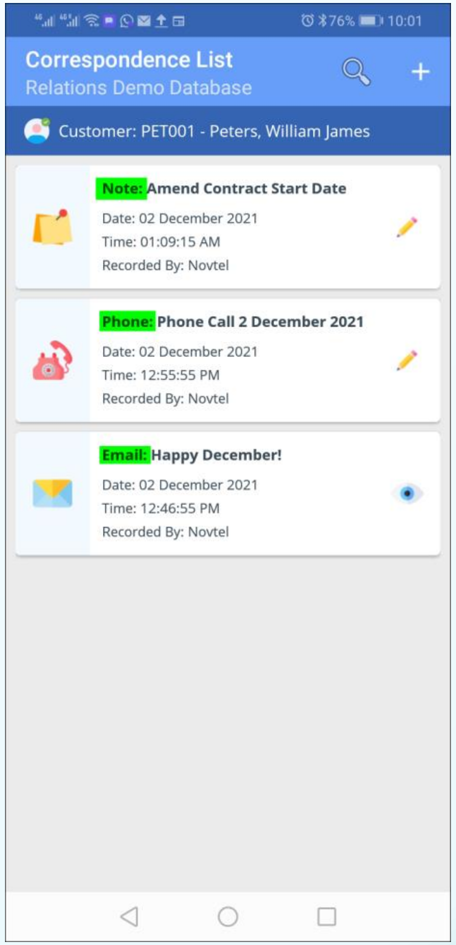


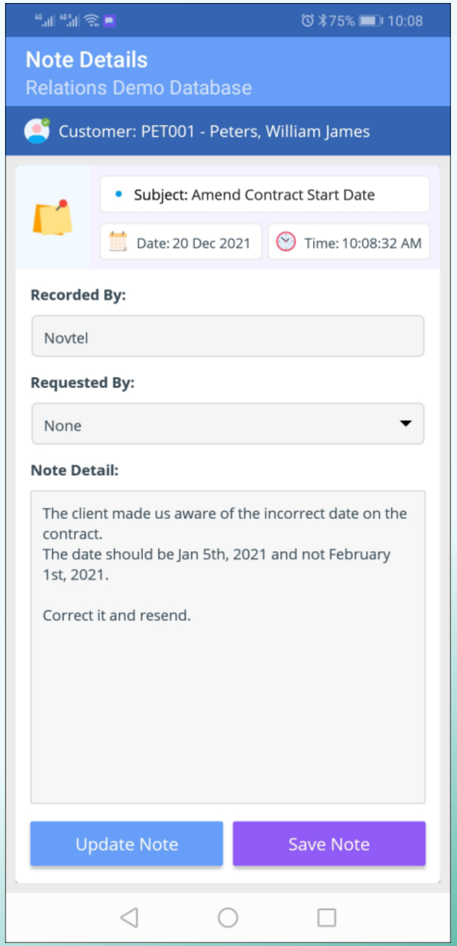
The Novtel Relations Management Mobile App



Tapping a correspondence item, the details will be displayed as captured.

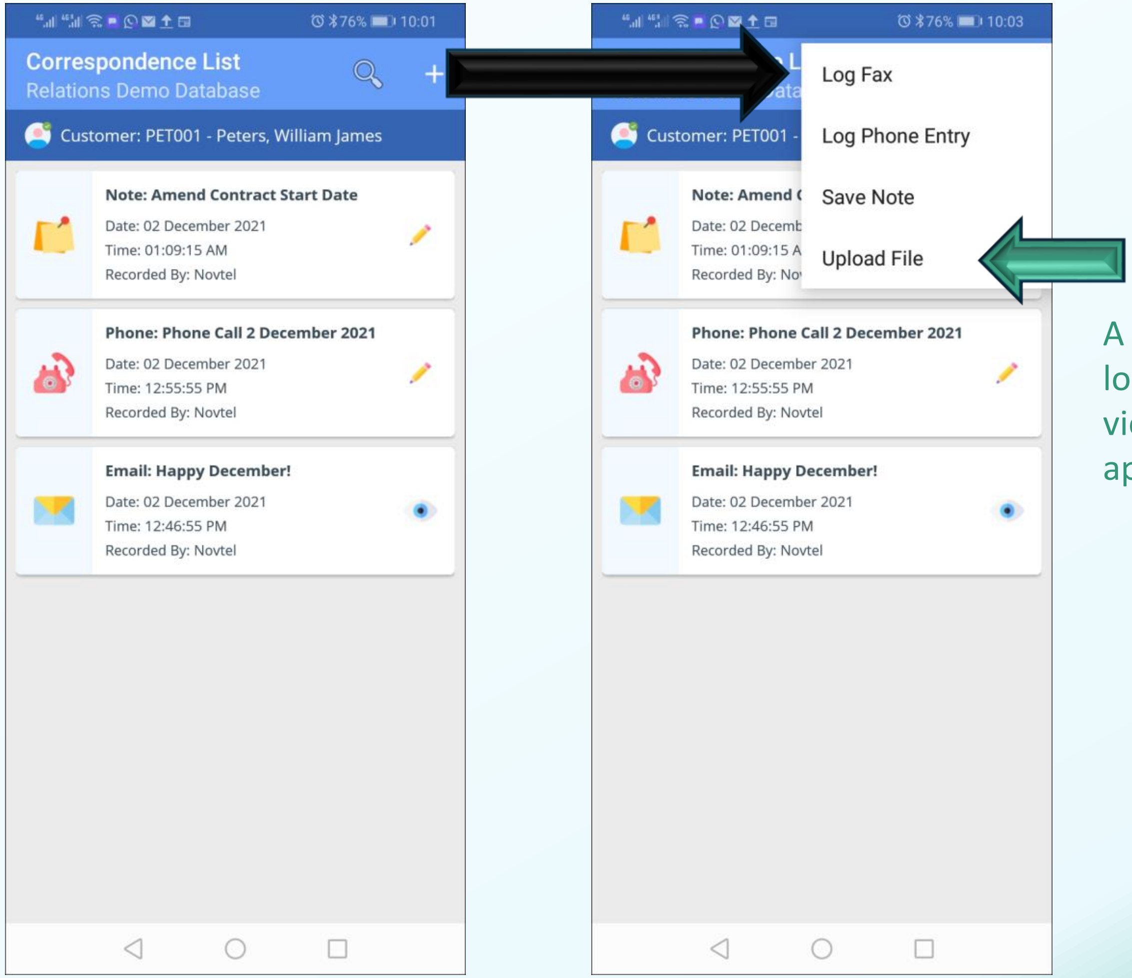
1. From here, the existing note can be amended and updated…
2. OR the note can be amended, and a new note saved.





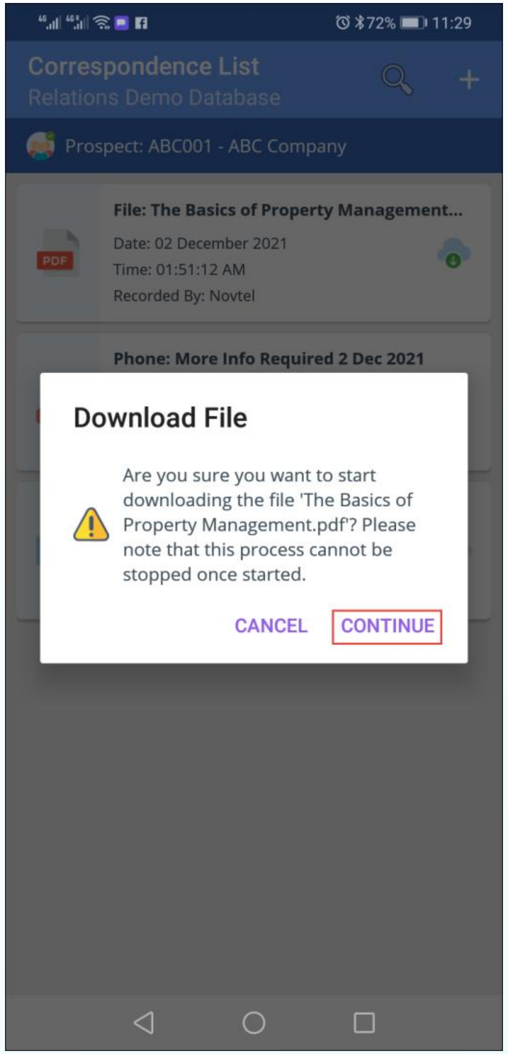
The Novtel Relations Management Mobile App

Tapping the '+' sign in the 'Correspondence List' window, a new fax, phone entry and note can be captured by selecting the relevant option.



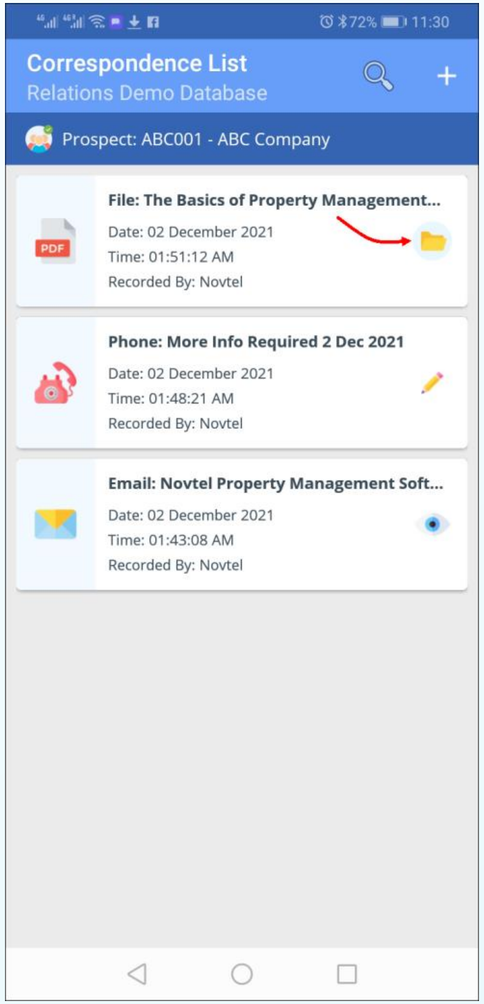
A new file can also be uploaded from the stored location on the mobile device and will be available to view directly in the app, as well as the desktop application.

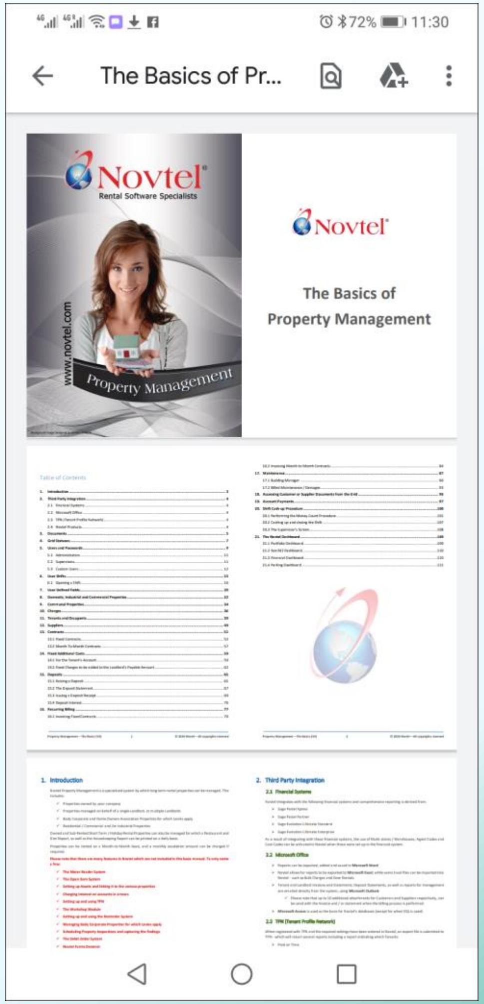
The Novtel Relations Management Mobile App



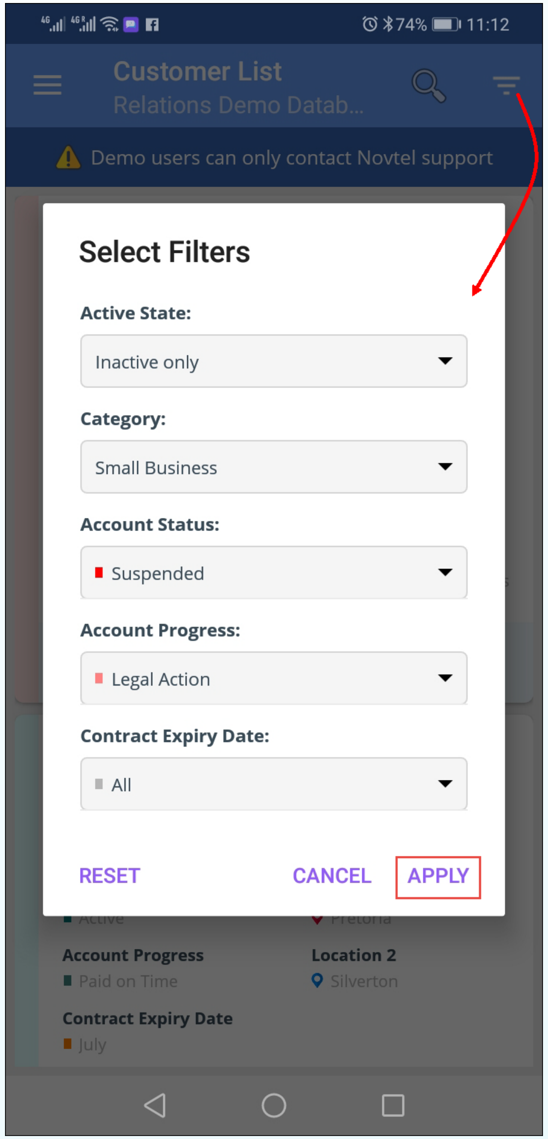
Tap ‘Continue’ to proceed with the downloading of the document.

By tapping on the downloaded document, it will be opened.





The Novtel Relations Management Mobile App



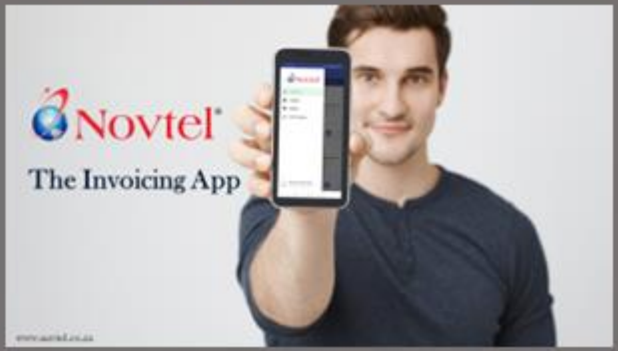
Accounts can be filtered and grouped together according to:

- **Active State:**
  - Active Accounts Only
  - In-active Accounts Only
  - All Accounts
- **Category:**

  A specified Customer, Supplier or Prospect Category.
- **Sub-Statuses:**

  A specified sub-status linked to a main status.

The search will be performed, and the matched criteria listed upon tapping ‘Apply’.



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