



SALES

ORDERS - CONVERT TO NEW DEAL SALE / RENTAL

- Converting a sales order to a **New Deal** will create a call and automatically request any parts / services listed on the Sales Order.
- Parts and Service requests can then be actioned (e.g. Procure and Issue Stock).
- You can log Time and Expenses incurred on a New Deal.
- An invoice can be raised directly from the call.
- The Serial Number or serialised items issued, will appear on the Printed Invoice.
- This call will remain in 'Open Work In Progress' until closed.

New Deal Sale

- Sale to the client (or via a finance house) where the item(s) become the customer's property.
- Serialised items will become Customer Assets.
- The part request is automatically logged against the 'Stock Warehouse'.
- An invoice must be raised for all 'billable' items.

New Deal Rental

- Serialised items will remain or be converted to Internal Assets.
- Enforces that Internal Assets are issued to the customer in order to link to a contract, but will still remain the company's property.
- The part request is automatically logged against the 'Asset Warehouse'.



An invoice <u>cannot</u> be raised against internal assets, but <u>can</u> be raised for any other 'billable' items logged on the call, e.g. time and expenses.

Ribbon Access: Sales > Orders

43	Ŧ	BPO: Version 2.4.0.11 - Example Company												_ •	X		
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- 1. The *Sales Orders* listing screen will be displayed.
- 2. Select the *Site* where the Sales Order can be located.
 - The example has *Durban* selected.
- 3. The *Status* must be set to **New Order**.

NEW DEAL SALE

- Select the *row* of the Sales Order that you wish to convert to a *New Deal Sale*.
- 5. Click on *Create New Deal*.



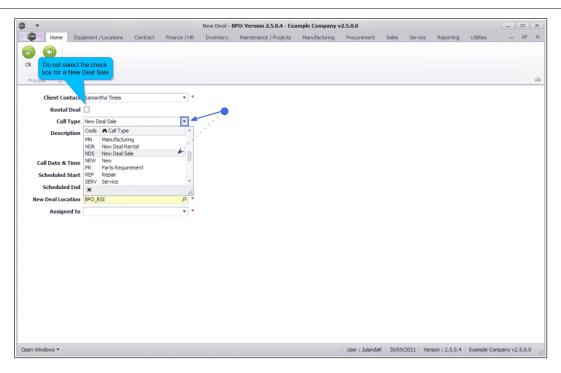
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OR00003	13 BOT000	1	Bothas Networki	ing inc	New order			337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
OR00003	11 HOP001		Hope Works (Pty	y) Ltd	New order	test		0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
OR00003	08 TIA001		Titan Group		New order	MRTEst		885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
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OR00003	03 PIN0001		Pink Shoes		New order	Test ema	ail	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
OR00003	00 HOP001		Hope Works (Pty	y) Ltd	New order	test		241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
OR00002	97 NEW 101	L	New Customer T	est	New order	test		150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
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OR00002	85 BEA001		Bearing and Sho	e	New order	TestQuo	teStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
OR00002	84 HOP001		Hope Works (Pty	y) Ltd	New order	1234		0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
OR00002	83 HOP001		Hope Works (Pty	y) Ltd	New order	test		0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
OR00002	82 HOP001		Hope Works (Pty	y) Ltd	New order	1234		920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
OR00002	81 TIA001		Titan Group		New order	Copy of	test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		

6. The *New Deal* screen will be displayed.

NEW DEAL INFORMATION

- **Client Contact:** This field will auto populate with the contact selected on the sales order. Click on the down arrow to select an alternative client contact, if required.
- Rental Deal: Do <u>not</u> select this check box for a New Deal
 Sale.
- **Call Type:** If this field has not populated with the 'New Deal Sale' call type, click on the down **arrow** to select 'New Deal Sale' from the menu.





- **Description:** The description will auto populate with the Description from the Customer Sales Order. Any additional information related to the call can be added to this field.
- Call Date and Time: The current date and time will display.
 - To change the date, type in or click on the down **arrow** to select an alternative date using the calendar function.
 - To change the time, type in or click on the arrow indicators to adjust the time.
- Scheduled Start: The current date will display in the field.
 - To change the scheduled start date, type in or click on the down **arrow** to select an alternative date, using the calendar function.
- Scheduled End: The scheduled end date will be calculate for 7 days from the scheduled start date.
 - To change the scheduled end date, type in or click on the down *arrow* to select an alternative date using the



calendar function.

- New Deal Location: The field will auto populate if a Functional Location has been set up. To select, or to change the location for the new deal,
 - i. Click on the *search button* to display the *Select a location for the new deal* screen.
 - ii. Click on the *row* of the location for the new deal.
 - iii. Click on **OK**.

Home Equ	pment / Locations Contract	Finance / HR	Inventory	PPO: Version 2.5.0.4 - Ex Maintenance / Projects	Manufacturing	Procurement	Sales Serv	ice Reporti	ing Utilities	-	. 8
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Doen Windows 🕶						licar - Julgardal	30/09/2021	Version + 2 E	0.4 Evanda	Company	2500

• Assigned to: Click on the down *arrow* to select the person this new deal will be assigned to.

SAVE NEW DEAL SALE

 When you have finished completing the new deal information, click on OK.



*		New De	al - BPO: Version 2.5.0.4 - Ex	ample Company v	/2.5.0.0			_ – x
Home Equ	ipment / Locations Contract	t Finance / HR Invento	ry Maintenance / Projects	Manufacturing	Procurement	Sales S	ervice Reporting	Utilities — 🗗 🗙
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Description	PRJ408/1	*						
Call Date & Time	30/09/2021 • 15:27:59	\$						
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New Deal Location	Mayfield Centre - First Floor	* م						
Assigned to	Steven Cooper	•	1.1					
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Open Windows 🔻					User : Julandai	x 30/09/202	1 Version : 2.5.0.4	Example Company v2.5.0.0

- 8. When you receive the *New Deal* message to confirm;
 - The new deal call has been created, reference no. CN[new

deal ref number]

9. Click on *OK*.

*			New Deal -	BPO: Version 2.5.0.4 - Ex	ample Company v	/2.5.0.0						
Home Equ	ipment / Locations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	— d	7 ×
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10. You will return to the *Sales Orders* listing screen.

The Sales Order will no longer be available from the *New Order* status list. Change the Status to the *Invoiced Order* status on the Sales Orders listing screen, to view.

11. The New Deal Sale has now been assigned to the <u>Call Listing</u> screen where it can be viewed.

NEW DEAL RENTAL

- 1. Ensure that the correct *Site* has been selected and that the *Status* is set to **New Order**.
- Select the *row* of the Sales Order that you wish to convert to a *New Deal Rental*.
- 3. Click on *Create New Deal*.

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h	OR0000220	BET0001	Betties Summer Shop	New order	1234	23,029.07	ZAR	21/08/2017	Bianca Du Toit	1.00	14.00	11:49:29	
	OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Bianca Du Toit	1.00	14.00	14:49:36	
ľ	OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Bianca Du Toit	10.00	0.00	02:50:18	
ľ	OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60	ZAR	09/04/2018	Bianca Du Toit	1.00	15.00	10:18:06	
h	OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Bianca Du Toit	1.00	15.00	02:58:26	
1	OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Bianca Du Toit	1.00	14.00	14:16:30	
•	OR0000279	APP0001	Apple Juice Inc	New order	C copy Test source	81.94	ZAR	08/01/2019	Belinda Sharman	1.00	15.00	16:56:08	
	OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51	
	OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13	
	OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21	
	OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52	
	OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22	
	OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34	
	OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46	
	OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59	
	OR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21	
	OR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25	
	OR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06	
	OR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51	



4. The *New Deal* screen will be displayed.

NEW DEAL RENTAL INFORMATION

- **Client Contact:** The field will be updated with the contact selected on the sales order.
- Rental Deal:
 The rental deal check box <u>must</u> be ticked for New Deal Rental.
- **Call Type:** The field should be populate with the 'New Deal Rental' call type, else click on the **arrow** to select the relevant call type from the menu.
- **Description:** The description will auto populate with the Description from the Customer Sales Order. Any additional information related to the call can be added to this field.
- **Call Date and Time:** The current date and time will display. Click on the **arrows** to select an alternative date and time, if required.
- Scheduled Start: The current date will display in the field, click on the **arrow** to select an alternative scheduled start date, if required.
- Scheduled End: The scheduled end date will be calculate for 7 days from the scheduled start date. Click on the *arrow* to select an alternative scheduled end date, if required.
- New Deal Location: The field will auto populate if a Functional Location has been set up. Click on the *search* icon to select the location for this New Deal **Sale**.
- Assigned to: Click on the *arrow*, to select from the menu, the person who this new deal will be assigned to.

SAVE NEW DEAL RENTAL

5. When finished completing the new deal information, click OK.



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Ok Back												
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Client Contact	Joe Blog		-	•								
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Assigned to	Steven Cooper		•	•								
			_									
Open Windows 🕶							User : Jula	ndaK 2	3/03/2021	Version : 2.	4.0.11 Ex	ample Company

- 6. When you receive the *New Deal* message to confirm;
 - The new deal call has been created, reference no. [].
- 7. Click on OK.



				New D	eal - BPO: Version 2.4.0.11	- Example Comp	any			- • ×
Home Equip	oment / Locations	Contract	Finance / HR	Invento	ry Maintenance / Projects	Manufacturing	Procurement	Sales Service	Reporting Utilit	ы. – в ×
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New Deal Location			م •]	
Assigned to	Steven Cooper		•							
Open Windows 🕶							User : Jula	ndaK 23/03/2021	Version : 2.4.0.11	Example Company

8. You will return to the *Sales Orders* listing screen.

The Sales Order will no longer be available from the *New Order* status list. Change the Status to the *Invoiced Order* status on the Sales Orders listing screen, to view.

9. The New Deal Rental has now been assigned to the <u>Call Listing</u> screen where it can be viewed.

Related Topics

• Service - Introduction to Calls

MNU.126.006