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.
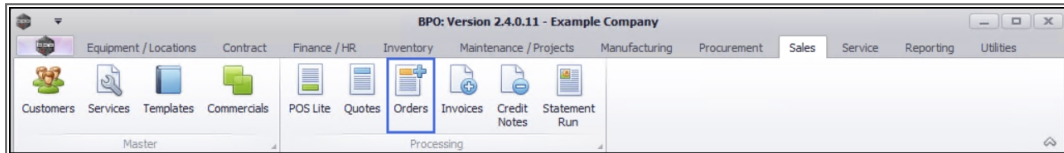
New Deal Sale

- 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.
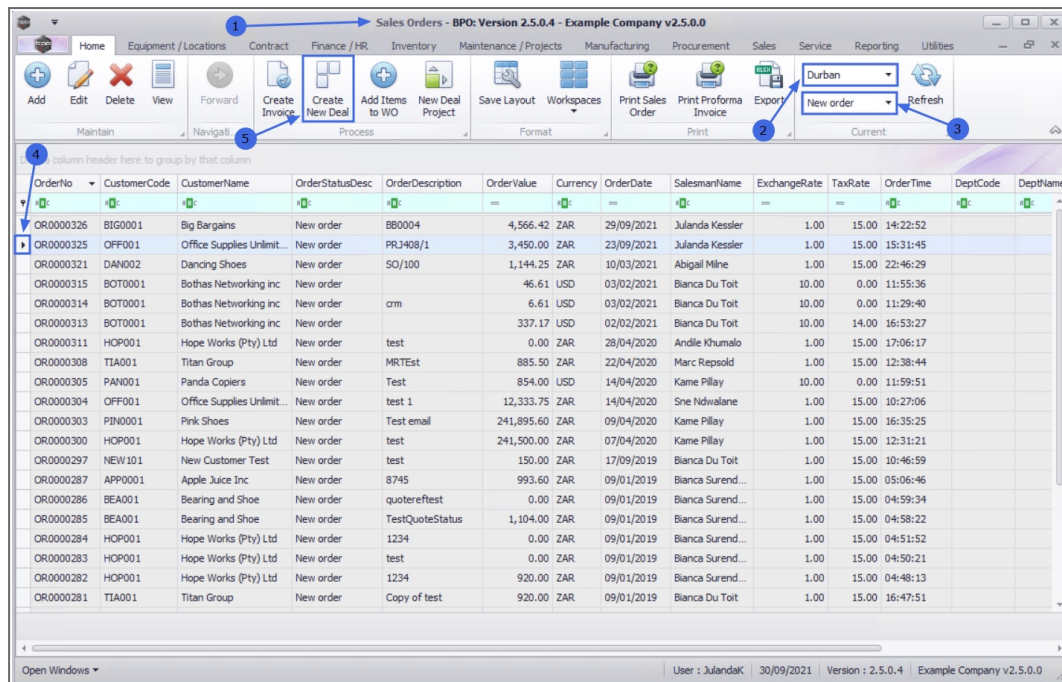

Ribbon Access: *Sales > Orders*

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.
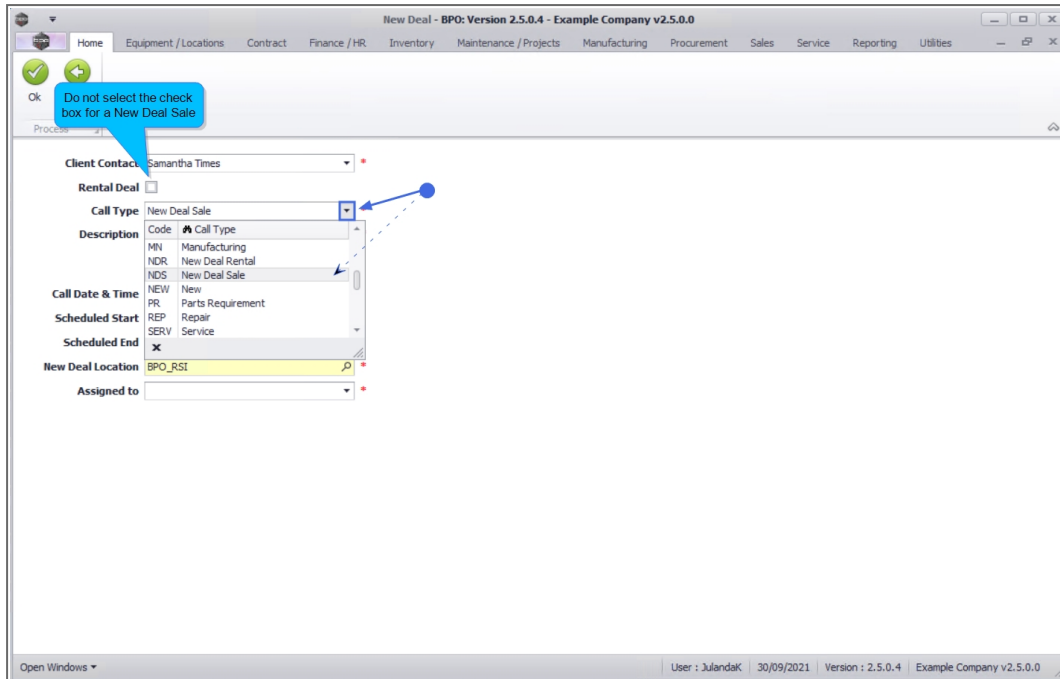3. The *Status* must be set to **New Order**.

NEW DEAL SALE

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

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 not 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
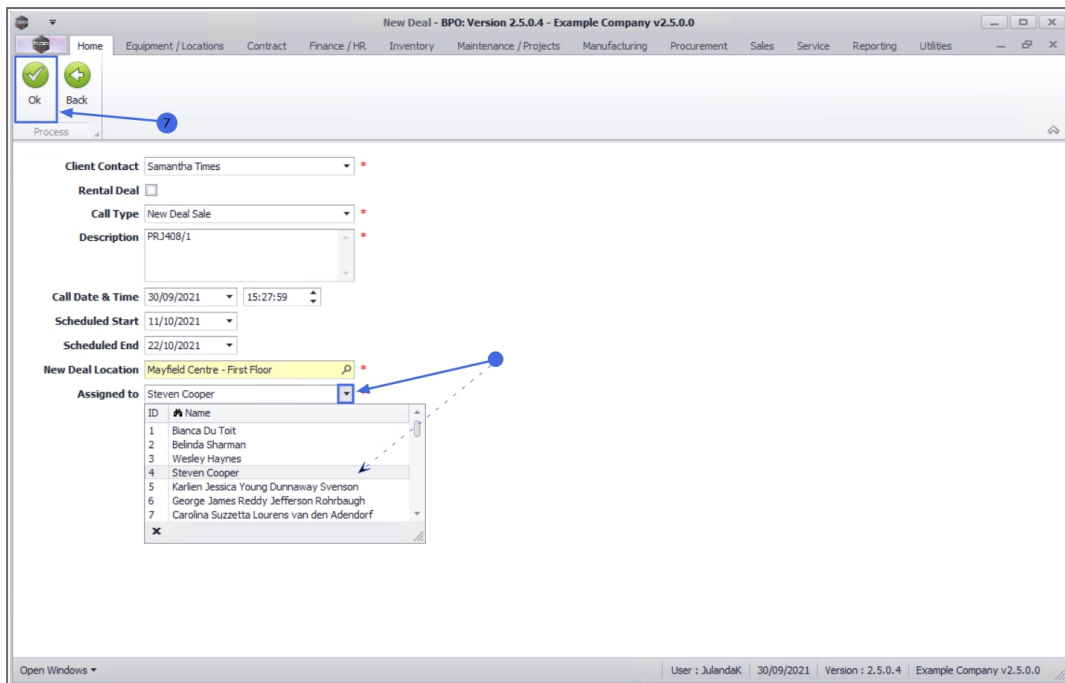
calendar function.

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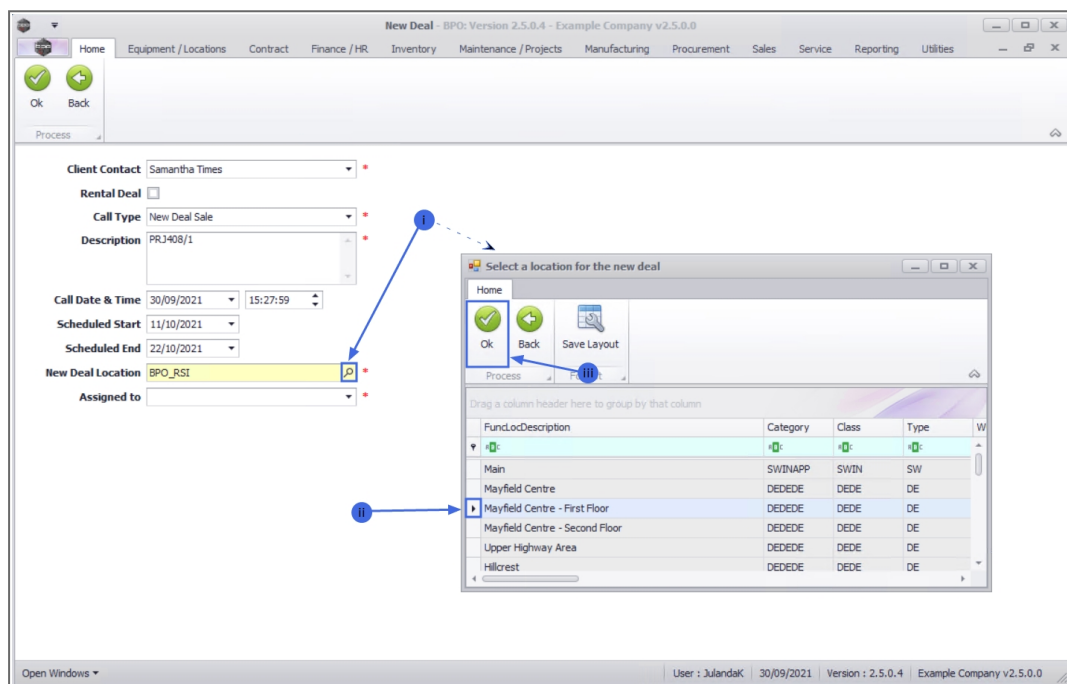
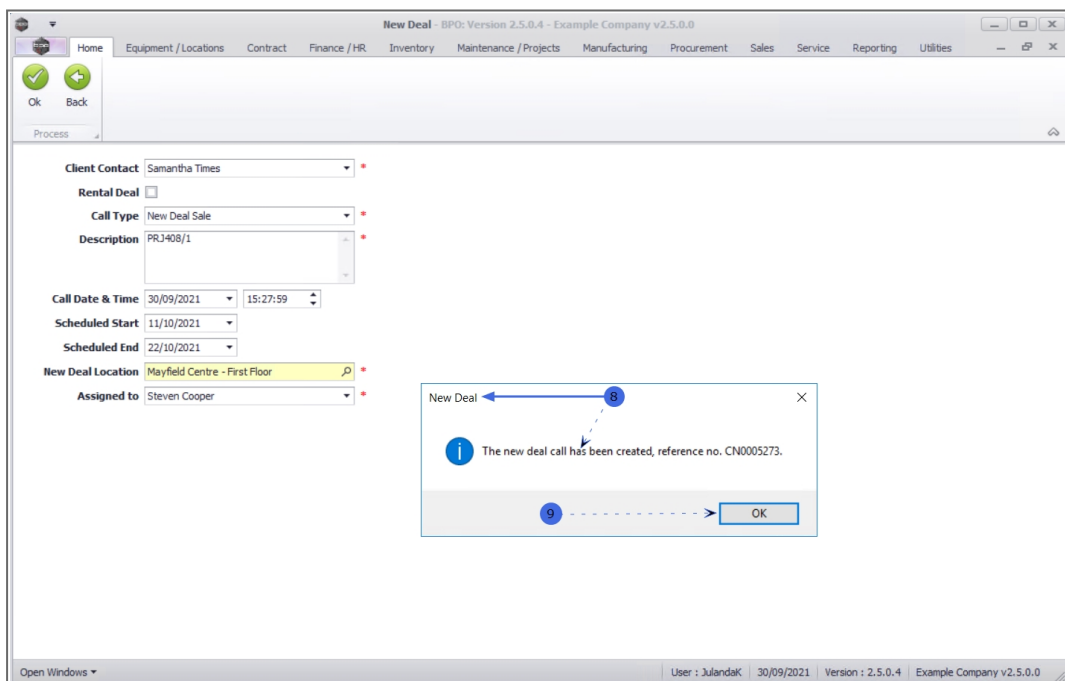- **Assigned to:** Click on the down **arrow** to select the person this new deal will be assigned to.

SAVE NEW DEAL SALE

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

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*.

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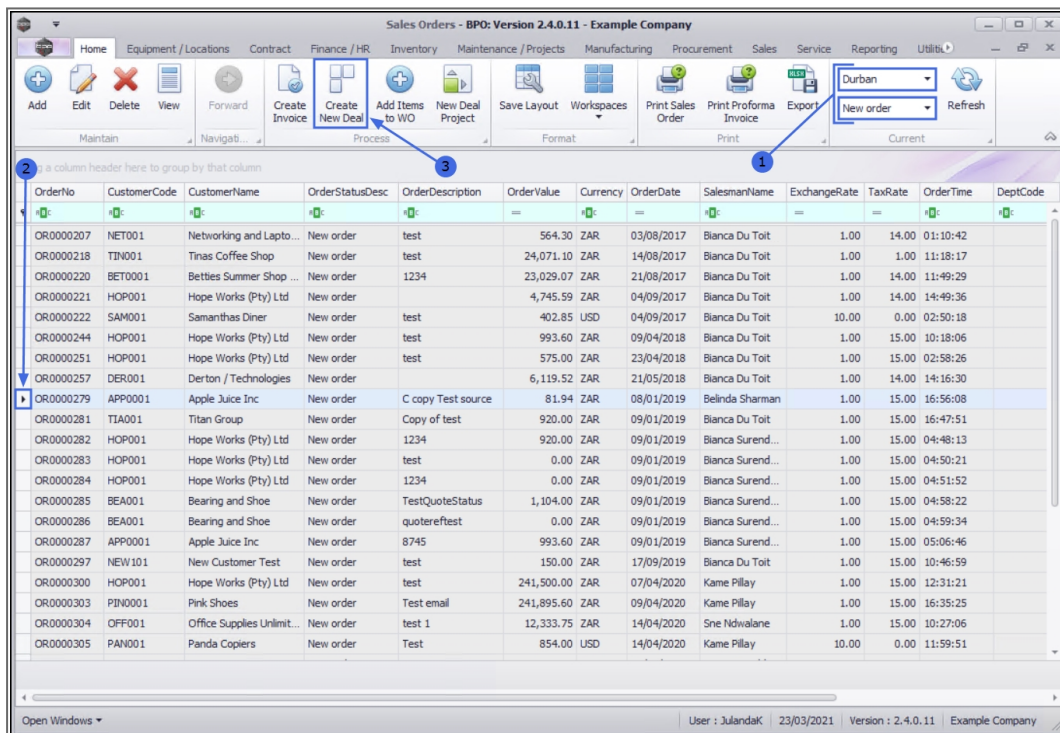
> 📝 The Sales Order will no longer be available from the *New Order* status list. Change the Status to the *Invoiced Order* status on the Sales Orders listing screen, to view.

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**.
2. Select the *row* of the Sales Order that you wish to convert to a *New Deal Rental*.
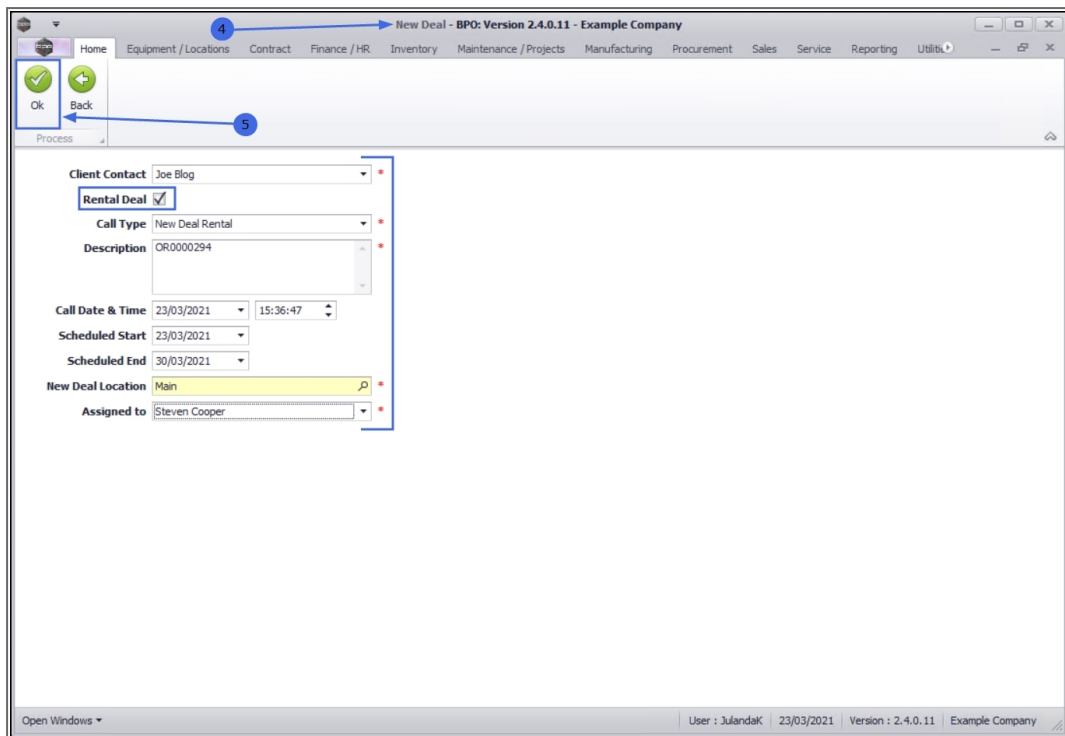3. Click on *Create New Deal*.

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

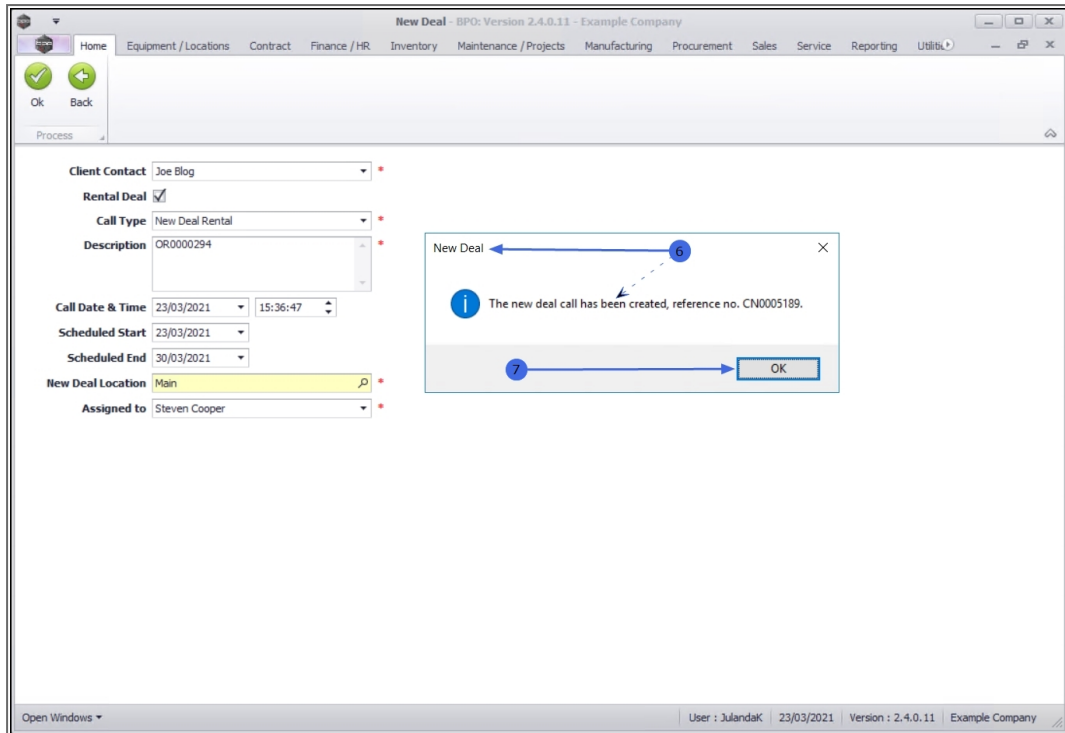## NEW DEAL RENTAL INFORMATION

- **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*.

6. When you receive the *New Deal* message to confirm;

- *The new deal call has been created, reference no. [ ].*

7. Click on *OK*.

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 **Call Listing** screen where it can be viewed.

Related Topics

- Service - Introduction to Calls

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