

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

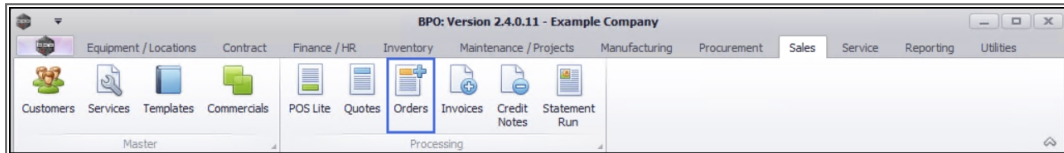
- Sale to the client (or via a finance house) where the item(s) become the customer's property.
- Serialised items will become Customer Assets.
- The part request is automatically logged against the 'Stock Warehouse'.
- An invoice must be raised for all 'billable' items.

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

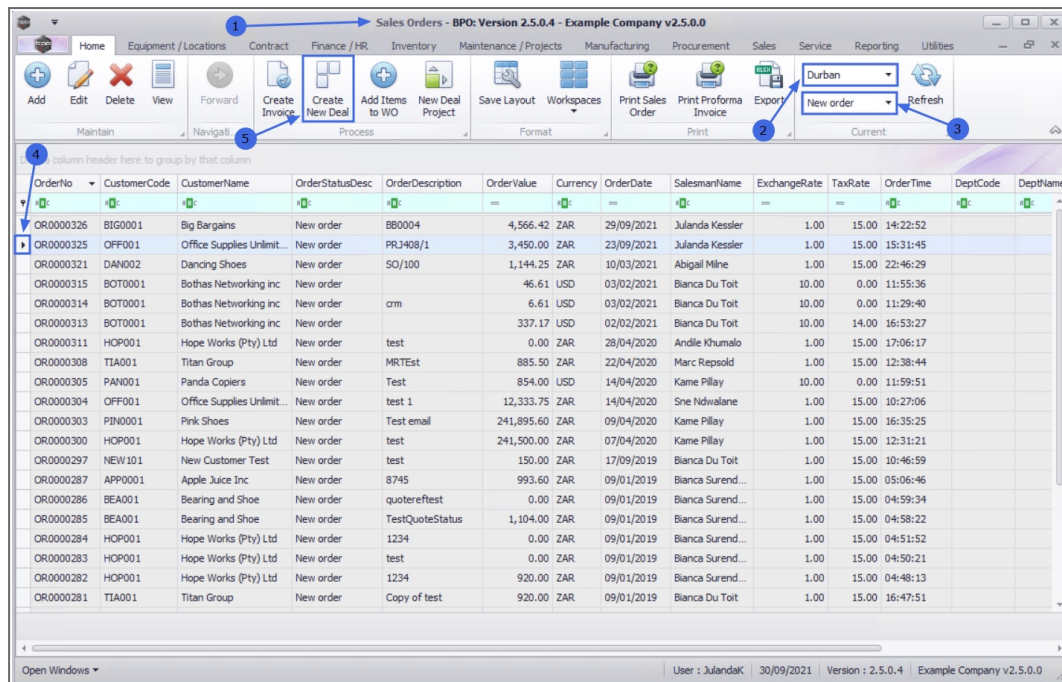
Ribbon Access: *Sales > Orders*



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

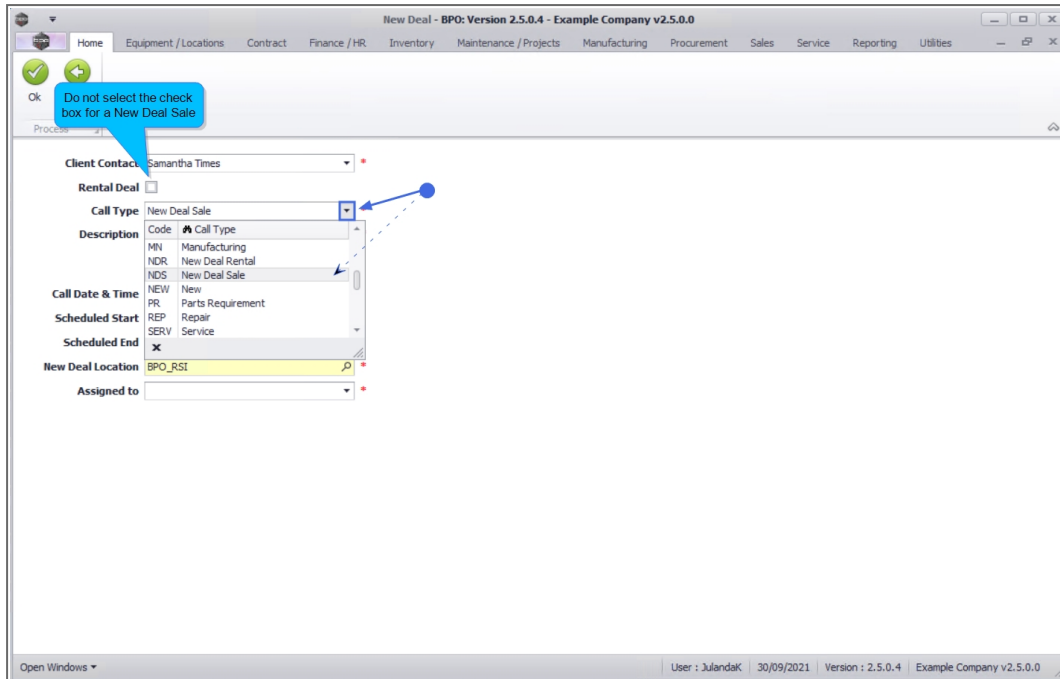
4. Select the **row** of the Sales Order that you wish to convert to a **New Deal Sale**.
5. Click on **Create New Deal**.



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.



Client Contact: Samantha Times

Rental Deal: ☐

Call Type: New Deal Sale

Description: Code: Call Type

Call Date & Time: NEW New

Scheduled Start: PR Parts Requirement

Scheduled End: REP Repair

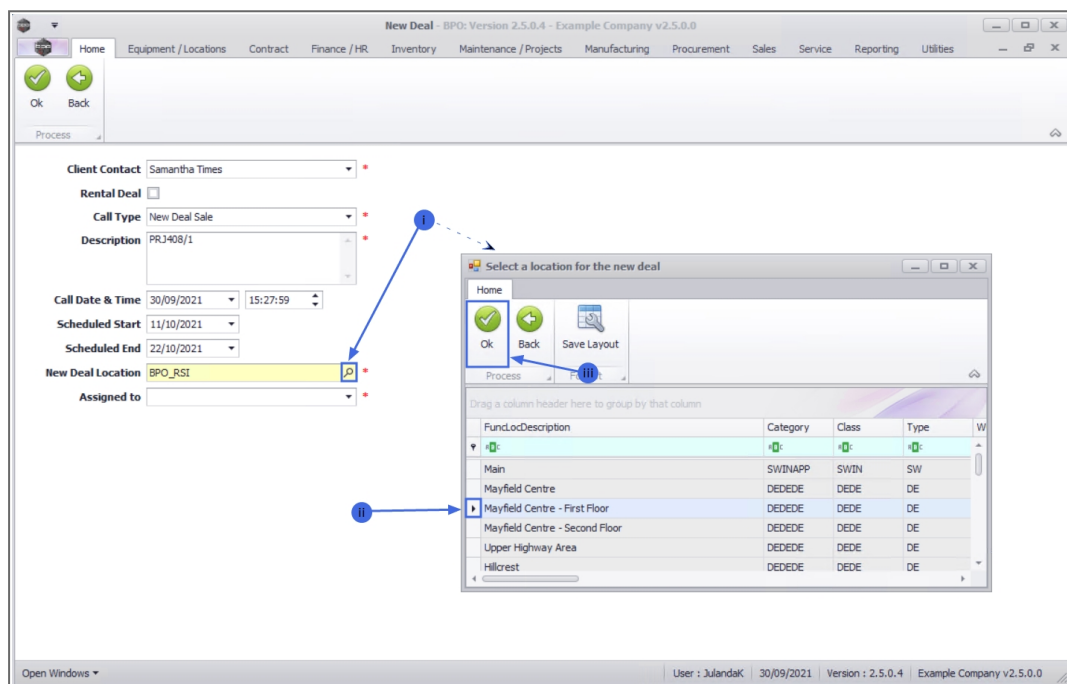
New Deal Location: BPO_RSI

Assigned to:

- **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.

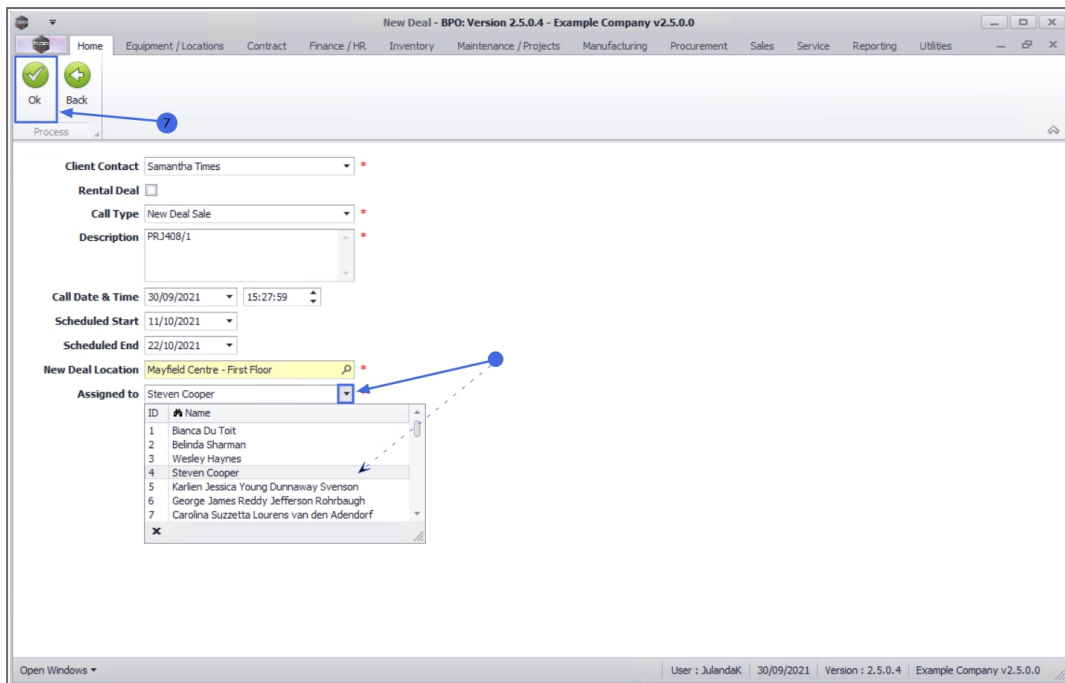
- **New Deal Location:** The field will auto populate if a Functional Location has been set up. To select, or to change the location for the new deal,
 - i. Click on the **search button** to display the **Select a location for the new deal** screen.
 - ii. Click on the **row** of the location for the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



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

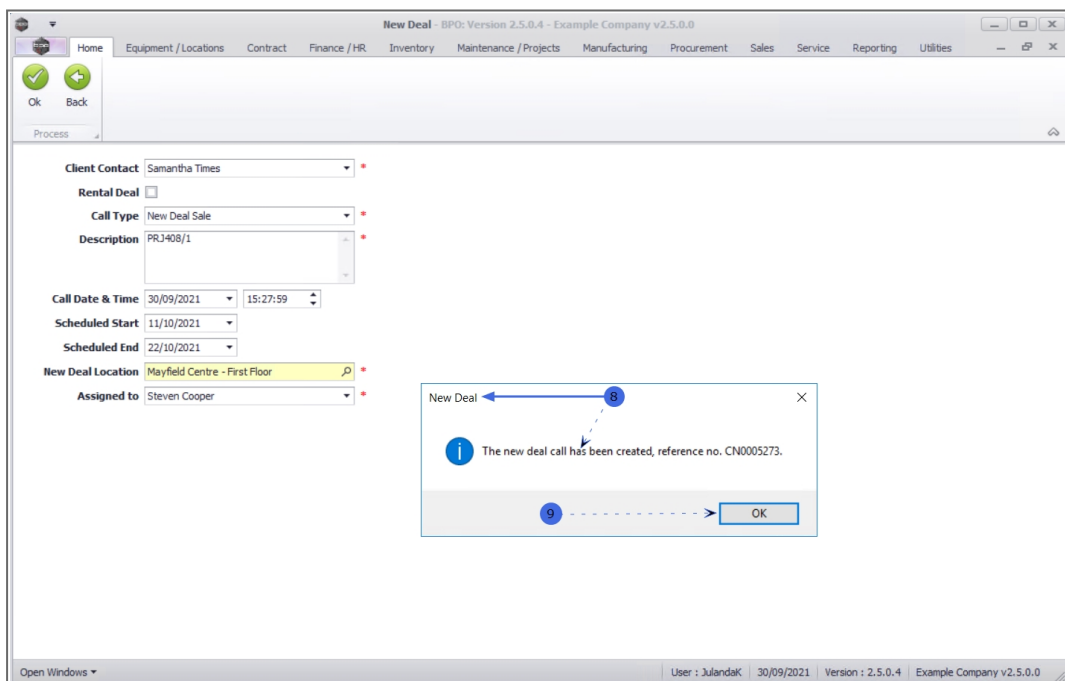
SAVE NEW DEAL SALE

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.

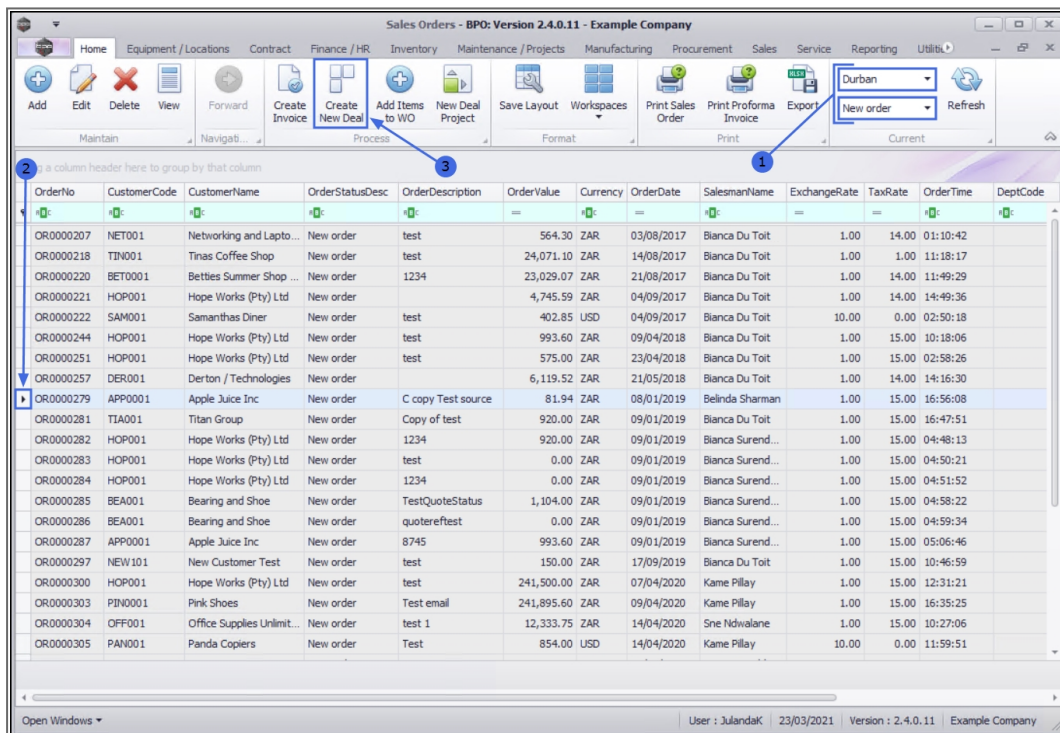


The Sales Order will no longer be available from the **New Order** status list. Change the Status to the **Invoiced Order** status on the Sales Orders listing screen, to view.

11. The New Deal Sale has now been assigned to the **Call Listing** 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**.



OrderNo	CustomerCode	CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode
OR0000207	NET001	Networking and Lapto...	New order	test	564.30	ZAR	03/08/2017	Blanca Du Toit	1.00	14.00	01:10:42	
OR0000218	TIN001	Tinas Coffee Shop	New order	test	24,071.10	ZAR	14/08/2017	Blanca Du Toit	1.00	1.00	11:18:17	
OR0000220	BET0001	Betties Summer Shop ...	New order	1234	23,029.07	ZAR	21/08/2017	Blanca Du Toit	1.00	14.00	11:49:29	
OR0000221	HOP001	Hope Works (Pty) Ltd	New order		4,745.59	ZAR	04/09/2017	Blanca Du Toit	1.00	14.00	14:49:36	
OR0000222	SAM001	Samanthas Diner	New order	test	402.85	USD	04/09/2017	Blanca Du Toit	10.00	0.00	02:50:18	
OR0000244	HOP001	Hope Works (Pty) Ltd	New order	test	993.60	ZAR	09/04/2018	Blanca Du Toit	1.00	15.00	10:18:06	
OR0000251	HOP001	Hope Works (Pty) Ltd	New order	test	575.00	ZAR	23/04/2018	Blanca Du Toit	1.00	15.00	02:58:26	
OR0000257	DER001	Derton / Technologies	New order		6,119.52	ZAR	21/05/2018	Blanca 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 Sharmar	1.00	15.00	16:56:08	
OR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Blanca Du Toit	1.00	15.00	16:47:51	
OR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:48:13	
OR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:50:21	
OR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:51:52	
OR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:58:22	
OR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	04:59:34	
OR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Blanca Surend...	1.00	15.00	05:06:46	
OR0000297	NEW101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Blanca 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 Unlim...	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwane	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	

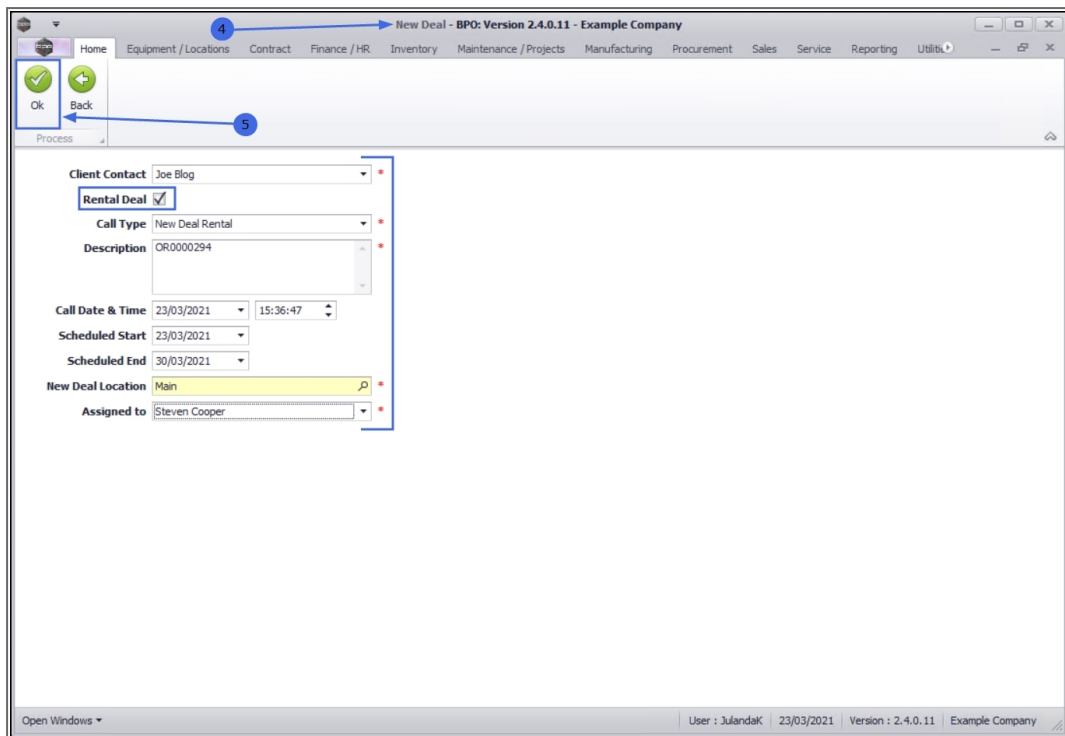
4. The **New Deal** screen will be displayed.

NEW DEAL RENTAL INFORMATION

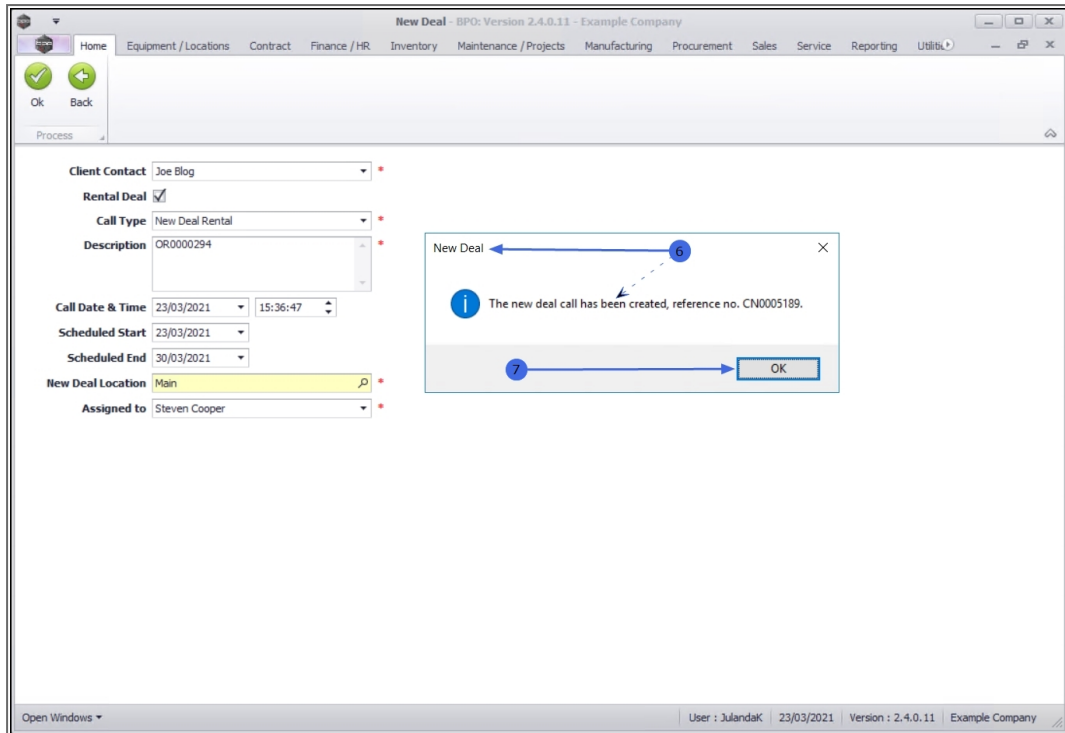
- **Client Contact:** The field will be updated with the contact selected on the sales order.
- **Rental Deal:**  The rental deal check box must be ticked for New Deal **Rental**.
- **Call Type:** The field should be populated with the 'New Deal Rental' call type, else click on the **arrow** to select 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 calculated 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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