

# **SALES**

## **ORDERS - CONVERT TO NEW DEAL PROJECT**

- New Deal Project is a sales process that will create a project for work to be done and invoiced upon completion. This is designed for a more complex work requirement, with multiple work orders for various aspects of the project. A Project Methodology can also be applied.
- Converting a sales order to a New Deal Project will create a Project 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 have the ability to log Time and Expenses incurred on a New Deal.
- An invoice can be raised directly from the project.
- The serial number or serialised items issued, will appear on the printed invoice.
- This Project will remain in 'Open Work In Progress' until closed.

#### New Deal Project Sale

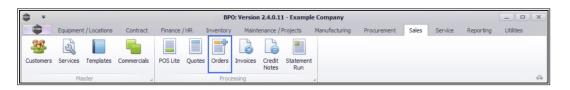
- Sale to the client (or via a finance house) where the item(s) become the customer's property.
- Serialised items will become Customer Assets.
- The part request is automatically logged against the 'Stock Warehouse'.
- An invoice must be raised for all 'billable' items.

#### New Deal Project Rental



- Serialised items will remain or be converted to Internal Assets.
- Enforces 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 can be raised for any other 'billable' items logged on the call, e.g. time and expenses.

Ribbon Access: Sales > Orders



## **NEW DEAL PROJECT SALE**

- 1. The *Sales Orders* listing screen will be displayed.
- 2. Select the *Site* where the order can be located.
  - The example has *Durban* selected.
- 3. Ensure that the *Status* has been set to *New Order*.
- Click on the *row* of the *Sales Order* you wish to *convert* to a New Deal Project Sale.
- 5. Click on *New Deal Project*.



Orders - Convert to New Deal Project

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1	DR0000286	BEA001	Bearing and Shoe	New order	quotereftest	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:59:34		
(	DR0000287	APP0001	Apple Juice Inc	New order	8745	993.60	ZAR	09/01/2019	Bianca Surend	1.00	15.00	05:06:46		
1	DR0000297	NEW 101	New Customer Test	New order	test	150.00	ZAR	17/09/2019	Bianca Du Toit	1.00	15.00	10:46:59		
1	DR0000300	HOP001	Hope Works (Pty) Ltd	New order	test	241,500.00	ZAR	07/04/2020	Kame Pillay	1.00	15.00	12:31:21		
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(	DR0000308	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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1	DR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
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1	DR0000315	BOT0001	Bothas Networking inc	New order		46.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:55:36		
	DR0000316	BIG0001	Big Bargains	New order	B60004	354.14	ZAR	03/02/2021	Julanda Kessler	1.00	15.00	13:48:19		
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1	DR0000321	DAN002	Dancing Shoes	New order	SO/100	1,144.25	ZAR	10/03/2021	Abigail Milne	1.00	15.00	22:46:29		

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

## **PROJECT SALE DETAILS**

- **Client Contact:** This field will auto populate with the client contact that was selected on the sales order.
  - Click on the down *arrow* to select an alternative contact, if required.
- Contact Type: Click on the down arrow to select *Project Manager* as the contact type.
- Rental Deal: Do <u>not</u> select this field for a New Deal Project
  Sale.

Serialised items will be requested from the stock warehouse.

• Work Order Type: This field will populate with the 'New Deal Sale' work order type that was specified.



• Click on the down **arrow** to select an alternative work order type from the menu.

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- **Description:** This field will auto populate with the description entered on the sales order for the customer. You can add additional information to the call description.
- Scheduled Start: This field will auto populate with the current date.
  - To change the date, type in or click on the down **arrow** to select an alternative start 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 data, type in or click on the down **arrow** to select an alternative scheduled end date using the calendar function.



- New Deals Location: The new deal location will auto populate if a Functional Location has been set up for the customer. 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**.

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• Assigned To: Click on the down **arrow** and select the person to whom the new deal project has been assigned to.

#### SAVE PROJECT SALE DETAILS

 When you have finished adding the New Deal Project Sale details, click on *OK*.



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- 8. When you receive the *New Deal* message confirming;
  - The new deal project has been created, reference no. PRJ [project ref number].
- 9. Click on *OK*.



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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, but will now be listed under the *Invoiced Order* status on the Sales Orders listing screen.

11. The New Deal Project Sale has now been assigned to the **Project Listing** screen where it can be viewed.

## **NEW DEAL PROJECT RENTAL**

- 1. From the *Sales Orders* listing screen,
- Ensure that the correct *Site* has been selected and that the *Status* has been set to New Order.
- Select the *row* of the *sales order* that you wish to *convert* to a New Deal Project Rental.
- 4. Click on *New Deal Project*.



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OR0000287      APP0001      Apple Juce Inc      New order      B745      993.60      ZAR      09/01/2019      Bianca Surend      1.00      15.00      05:06:46        OR0000297      NEW 101      New Outsomer Test      New order      test      15:00      ZAR      17/09/2019      Bianca Du Toit      1.00      15:00		04:58:22	15.00	1.00	Bianca Surend	09/01/2019	ZAR	1,104.00	TestQuoteStatus	New order	Bearing and Shoe	BEA001	OR0000285
OR0000297      NEV101      New Oustomer Test      New order      test      150.0      ZAR      7/09/2019      Blanca Du Toit      10.0      15.00		04:59:34	15.00	1.00	Bianca Surend	09/01/2019	ZAR	0.00	quotereftest	New order	Bearing and Shoe	BEA001	OR0000286
OR0000300      HOP011      Hope Works (Pty) Ltd      New order      test      241,500.00      ZAR      07/04/2020      Kame Pilay      1.00      15.00      12:31:21        OR0000303      PIN001      Prick Shoes      New order      Test email      241,985.60      ZAR      06/04/2020      Kame Pilay      1.00      15.00      15:32:52        OR0000304      OFF001      Office Supples Unlimit      New order      test 1      12,333.72      R4/04/2020      Sne Ndwalame      1.00      15.00      10:27:06        OR0000305      OFF001      Office Supples Unlimit      New order      Test      854.00      USD      14/04/2020      Sne Ndwalame      1.00      15.00      10:27:06        OR0000305      TAA01      Titan Group      New order      Test      854.00      USD      14/04/2020      Kame Pilay      1.00      15.00      12:38:44        OR000031      HOP0011      Titan Group      New order      test      0.00      Z8/04/2020      Marc Repold      1.00      15.00      15:00      12:38:44        OR000031      BOT001      Bothas Network		05:06:46	15.00	1.00	Bianca Surend	09/01/2019	ZAR	993.60	8745	New order	Apple Juice Inc	APP0001	OR0000287
OR0000303      PIN0001      Pirk Shoes      New order      Test email      241,895.60      ZAR      09/04/2020      Kame Pilay      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      15:27:06        OR0000305      PAN001      Panda Copiers      New order      Test      854.00      USD      14/04/2020      Kame Pilay      10.00      0.00      11:59:51        OR0000305      TA001      Titan Group      New order      MRTEst      885.50      ZAR      22/04/2020      Marc Resold      1.00      15.00      12:38:44        OR0000311      HOP001      Hope Works (Pty) Ltd      New order      test      0.02      ZAR      22/04/2020      Andle Khumalo      10.00      15.00      12:08:1706:17        OR0000315      BOT0001      Bothas Networking inc      New order      Tot      337.17      USO (20/2202)      Binca Du Toit      10.00      10.00      15:00      15:00      12:29:44        OR0000031		10:46:59	15.00	1.00	Bianca Du Toit	17/09/2019	ZAR	150.00	test	New order	New Customer Test	NEW 101	OR0000297
OR0000304      OFfo1      Office Supplies Unlimit      New order      test 1      12,33.75      ZAR      14/04/2020      Sen Ndwalane      1.00      15.00      10:27:06        OR0000305      PAN001      Panda Copiers      New order      Test      854.00      USD      14/04/2020      Kame Pilay      10.00      0.00      11:59:51        OR0000305      TA001      Titan Group      New order      MRTEst      885.50      ZAR      22/04/2020      Marc Repsol      1.00      15.00      12:38:44        OR0000311      HOPO Viroks (Pty) Ltd      New order      test      0.00      ZAR      28/04/2020      Andle Khumalo      1.00      15.00      17:06:17        OR0000313      BOT0001      Bothas Networking inc      New order      cm      337.17      USD      02/02/2021      Bianca Du Toit      10.00      10:50:17:06:17        OR0000314      BOT0001      Bothas Networking inc      New order      cm      6.61      USD      03/02/2021      Bianca Du Toit      10.00      0.00      15:32:27        OR0000315      BOT0001      Bothas Networking inc		12:31:21	15.00	1.00	Kame Pillay	07/04/2020	ZAR	241,500.00	test	New order	Hope Works (Pty) Ltd	HOP001	OR0000300
OR0000305      PAN001      Panda Copiers      New order      Test      B654.00      USD      14/04/2020      Kame Pillay      10.00      0.00      11:99:51        OR0000305      TIA001      Titan Group      New order      MRTEst      885.50      ZAR      22/04/2020      Marc Repsold      1.00      15.00      12:38:44        OR0000311      HOP0101      Hope Works (Pty) Ltd      New order      test      0.00      ZAR      28/04/2020      Andle Khumaho      10.00      15.00      17:06:17        OR0000313      BOT001      Bothas Networking inc      New order      37:17      USD      02/02/2021      Blanca Du Toit      10.00      14:00      16:53:27        OR0000314      BOT0001      Bothas Networking inc      New order      mm      6.61      USD      03/02/2021      Blanca Du Toit      10.00      10.00      11:29:490        OR0000315      BOT0001      Bothas Networking inc      New order      mm      46.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:55:367		16:35:25	15.00	1.00	Kame Pillay	09/04/2020	ZAR	241,895.60	Test email	New order	Pink Shoes	PIN0001	OR0000303
OR0000308      TIA001      Titan Group      New order      MRTEst      885.50      ZAR      22/04/2020      Marc Repold      1.00      15.00      12:38:44        OR0000311      HOPO011      Hope Works (Ptv) Ltd      New order      test      0.00      Z8/04/2020      Andler Khumalo      1.00      15.00      17:06:17        OR0000313      BOT001      Bothas Networking inc      New order      337.11      USD      02/02/2021      Blanca Du Toit      10.00      14.00      16:53:27        OR0000314      BOT0001      Bothas Networking inc      New order      cm      6.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:29:49        OR0000315      BOT001      Bothas Networking inc      New order      46.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:55:36		10:27:06	15.00	1.00	Sne Ndwalane	14/04/2020	ZAR	12,333.75	test 1	New order	Office Supplies Unlimit	OFF001	OR0000304
OR0000311      HOP011      Hope Works (Pty) Ltd      New order      test      0.00 ZAR      28/04/2020      Andle Khumalo      1.00      15.00      17.06:17        OR0000313      BOT0011      Bothas Networking inc      New order      337.17      USD      02/02/2021      Bianca Du Toit      10.00      14.00      16:53:27        OR0000314      BOT0011      Bothas Networking inc      New order      rm      6.61      USD      03/02/2021      Bianca Du Toit      10.00      0.00      11:29:40        OR0000315      BOT0011      Bothas Networking inc      New order      rm      46.61      USD      03/02/2021      Bianca Du Toit      10.00      0.00      11:29:40        OR0000315      BOT0011      Bothas Networking inc      New order      46.61      USD      03/02/2021      Bianca Du Toit      10.00      0.00      11:55:36		11:59:51	0.00	10.00	Kame Pillay	14/04/2020	USD	854.00	Test	New order	Panda Copiers	PAN001	OR0000305
OR0000313      BOT0011      Bothas Networking inc.      New order      337.17      USD      02/02/2021      Blanca Du Toit      10.00      14.00      16:53:27        OR0000314      BOT0011      Bothas Networking inc.      New order      orm      6.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:29:40        OR0000315      BOT0011      Bothas Networking inc.      New order      46.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:29:40		12:38:44	15.00	1.00	Marc Repsold	22/04/2020	ZAR	885.50	MRTEst	New order	Titan Group	TIA001	OR0000308
OR0000314      BOT0001      Bothas Networking inc      New order      cm      6.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:29:40        OR0000315      BOT0001      Bothas Networking inc      New order      46.61      USD      03/02/2021      Blanca Du Toit      10.00      0.00      11:29:40		17:06:17	15.00	1.00	Andile Khumalo	28/04/2020	ZAR	0.00	test	New order	Hope Works (Pty) Ltd	HOP001	OR0000311
OR0000315      BOT0001      Bothas Networking inc.      New order      46.51      USD      03/02/2021      Bianca Du Toit      10.00      0.00      11:55:36		16:53:27	14.00	10.00	Bianca Du Toit	02/02/2021	USD	337.17		New order	Bothas Networking inc	BOT0001	OR0000313
		11:29:40	0.00	10.00	Bianca Du Toit	03/02/2021	USD	6.61	crm	New order	Bothas Networking inc	BOT0001	OR0000314
		11:55:36	0.00	10.00	Bianca Du Toit	03/02/2021	USD	46.61		New order	Bothas Networking inc	BOT0001	OR0000315
OR0000320      OFF001      Office Supplies Unlimit      New order      OSU1001      3,239.17      ZAR      24/02/2021      Sasha Jones      1.00      15.00      11:36:10		11:36:10	15.00	1.00	Sasha Jones	24/02/2021	ZAR	3,239.17	OSU1001	New order	Office Supplies Unlimit	OFF001	OR0000320
0R0090321 DAN002 Dancing Shoes New order SO/100 1,144.25 ZAR 10/03/2021 Abigail Milne 1.00 15.00 22:46:29		22:46:29	15.00	1.00	Abigail Milne	10/03/2021	ZAR	1,144.25	SO/100	New order	Dancing Shoes	DAN002	OR0000321

5. The *New Deal Project* screen will be displayed.

## **PROJECT RENTAL DETAILS**

- **Client Contact:** This field will auto populate with the client contact that was selected on the sales order.
  - Click on the down *arrow* to select an alternative contact, if required.
- Contact Type: Click on the down *arrow* to select *Project Manager* as the contact type.
- **Rental Deal:** A Ensure that this check box <u>is</u> selected for **Rental Deals**.

Serialised items will be requested from the asset warehouse.

• Work Order Type: This field will populate with the 'New Deal Sale' work order type that was specified.



- Click on the down **arrow** to select an alternative work order type from the menu.
- **Description:** The description will auto populate with the description entered on the sales order for the customer. You can add additional information to the call description.
- Scheduled Start: This field will auto populate with the current date.
  - To change the date, type in or click on the down **arrow** to select an alternative start 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 data, type in or click on the down **arrow** to select an alternative scheduled end date using the calendar function.
- New Deals Location: The new deal location will auto populate if a Functional Location has been set up for the customer. Click on the *search* icon to select the location for the New Deal Project Rental.
- Assigned To: Click on the down *arrow*, to select from the menu, the person who this new deal project will be assigned to.

## SAVE PROJECT RENTAL DETAILS

6. When you have finished adding the New Deal Project Rental details, click on *OK*.



<b>•</b> =	5-			New Deal Pro	oject - BPO: Version 2.4.0	).11 - Example Co	ompany						x
Home Equi	pment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	_ 8	х
Ok Back													
	6												\$
Process a													~
Client Contact	Samantha Times		- *										
Contact Type	Project Manager		•										
Rental Deal	$\checkmark$												
Work Order Type	New Deal Rental		- *										
Description	OSU1001		* *										
			-										
Scheduled Start	24/03/2021	-											
Scheduled End		•											
New Deals Location			• م										
	Wesley Haynes		•	1									
Open Windows 🔻							User : Jul	andaK	24/03/2021	Version : 2.4	4.0.11 E	Example Company	1

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



<b>\$</b> =		New	w Deal Project - BPO: Version 2.4.0.	11 - Example Company			_ <b>D</b> X
Home Equi	pment / Locations Contract	Finance / HR Ir	Inventory Maintenance / Projects	Manufacturing Procurement	Sales Service	Reporting Utilities	@ ×
Ok Back							
							~
Process a							~~
Client Contact	Samantha Times	- *					
Contact Type	Project Manager	•					
Rental Deal	$\checkmark$						
Work Order Type	New Deal Rental	• *	New Deal	7	×		
Description	OSU 100 1	* *					
		-		has been created, reference no	BB10000407		
Scheduled Start	24/03/2021		The new deal project	nas been created, reference no	. PRJ0000407.		
Scheduled End							
New Deals Location		* م	8		ОК		
	Wesley Haynes	• •					
Assigned to	westey haynes						
Open Windows 🔻				User : Jul	andaK 24/03/2021	Version : 2.4.0.11	Example Company

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

The Sales Order will no longer be available from the *New Order* status list, but will now be listed under the *Invoiced Order* status on the Sales Orders listing screen.

10. The New Deal Project Sale has now been assigned to the **Project Listing** screen where it can be viewed.

#### **Related Topics**

• Introduction to Projects

MNU.126.008