

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

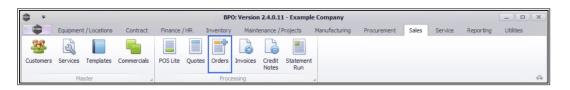
- Sale to the client (or via a finance house) where the item(s) become the customer's property.
- Serialised items will become Customer Assets.
- The part request is automatically logged against the 'Stock Warehouse'.
- An invoice must be raised for all 'billable' items.

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

-	d Edit	Delete View	Forward Creat	e Create Add	Items New Deal WO Project	Save Layout	Vorkspaces	Print Sales Order	Print Proforma Invoice	Export New	order	Refrest		
	Maint	tain	"Navigati "	Process		Format	5	4	Print	4	Currer	nt	3	
	OrderNo		CustomerName	OrderStatusDesc	OrderDescription	OrderValue	Currency	OrderDate	SalesmanName	ExchangeRate	TaxRate	OrderTime	DeptCode	
9	C	ROC	« 0 ¢	* 0 ¢	a C	=	R C	=	4 0 4	=	=	8 0 0	R	
1	DR0000281	TIA001	Titan Group	New order	Copy of test	920.00	ZAR	09/01/2019	Bianca Du Toit	1.00	15.00	16:47:51		
1	DR0000282	HOP001	Hope Works (Pty) Ltd	New order	1234	920.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:48:13		
(DR0000283	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:50:21		
1	DR0000284	HOP001	Hope Works (Pty) Ltd	New order	1234	0.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:51:52		
1	DR0000285	BEA001	Bearing and Shoe	New order	TestQuoteStatus	1,104.00	ZAR	09/01/2019	Bianca Surend	1.00	15.00	04:58:22		
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		
1	DR0000303	PIN0001	Pink Shoes	New order	Test email	241,895.60	ZAR	09/04/2020	Kame Pillay	1.00	15.00	16:35:25		
(DR0000304	OFF001	Office Supplies Unlimit	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	1.00	15.00	10:27:06		
(DR0000305	PAN001	Panda Copiers	New order	Test	854.00	USD	14/04/2020	Kame Pillay	10.00	0.00	11:59:51		
(DR0000308	TIA001	Titan Group	New order	MRTEst	885.50	ZAR	22/04/2020	Marc Repsold	1.00	15.00	12:38:44		
1	DR0000311	HOP001	Hope Works (Pty) Ltd	New order	test	0.00	ZAR	28/04/2020	Andile Khumalo	1.00	15.00	17:06:17		
1	DR0000313	BOT0001	Bothas Networking inc	New order		337.17	USD	02/02/2021	Bianca Du Toit	10.00	14.00	16:53:27		
1	DR0000314	BOT0001	Bothas Networking inc	New order	crm	6.61	USD	03/02/2021	Bianca Du Toit	10.00	0.00	11:29:40		
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		
1	0R8000320	OFF001	Office Supplies Unlimit	New order	OSU1001	3,239.17	ZAR	24/02/2021	Sasha Jones	1.00	15.00	11:36:10		
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.

• •	6		> Nev	v Deal Projec	t - BPO: Version 2.5.0.4 -	Example Compa	ny v2.5.0.0					_ 0	x
Home Equ	ipment / Locations	Contract Fin	ance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	- 8	×
Ok Back													
Do not sele													
Proce: New Deal Pr	oject Sale												\sim
Client Conta	Tarryn Snow CUSTOM	ER CONTACT	• •										
	Project Manager	EKCONTACT	•										
Rental Deal													
Work Order Type													
Description		er Type		11									
Description	IVD Intervid Time	keeper Support		1									
	MN Manufacturin NDR New Deal Rer												
Scheduled Start	NDS New Deal Sale		0										
Scheduled End													
New Deals Location	NSP Non Stock Pu	irchases	-										
Assigned to	^		- *										
Open Windows 🔻							User : JulandaK	01/10/2	021 Vers	ion : 2.5.0.4	Example Co	mpany v2.5.0.	0 //.

- **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**.

	upment / Locations Contract	Einnen /110	Tourseher	Maintennes / Destants	Manufacture	Procurement	Calar	Convine	Departies	L Tachar	-	- 6
Home Equi	upment / Locations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	s –	
Back												
cess 4												
Client Contact	Tarryn Snow CUSTOMER CONTA	ACT 🔻 *										
Contact Type	Project Manager											
Rental Deal												
Work Order Type	New Deal Sale	•	<u> </u>									
Description	B60004	*		1 · · · ·								
				1								
		-			` `\							
			/									
Scheduled Start	24/03/2021 -	/		Select a	a location for the	new deal						
Scheduled Start Scheduled End				Belect a	a location for the	new deal				(
	31/03/2021 -	P.		Home		new deal				(_	x
Scheduled End	31/03/2021 🔹	P •		Home	2					(_ 0	
Scheduled End	31/03/2021 🔹			Home Ok	Sack Save Layou					(_ 0	
Scheduled End	31/03/2021 •			Home	2					(_ 0	×
Scheduled End w Deals Location	31/03/2021 •			Home V N Process	Sack Save Layou	ut	m			(_ •	
Scheduled End w Deals Location	31/03/2021 •			Home We be Home Home Brage Drage a columnia	Save Layou	ut	nn	Catego	ory Class		Туре	
Scheduled End w Deals Location	31/03/2021 •			Home We be Home Home Brage Drage a columnia	Save Layou	ut	n	Catego	ory Class	15		
Scheduled End w Deals Location	31/03/2021 •			Home V Ok Process Drag a colur Fund.oct	Save Layou	ut	nn		100	5	Туре	
Scheduled End w Deals Location	31/03/2021 •			Home Vice and the second seco	Save Layou	ut	nn	SWINA DEDED	APP SWI	is IN IE	Type •Q: SW DE	
Scheduled End w Deals Location	31/03/2021 •			Home V V V V V V V V V V V V V	ack Save Layou	ut	n	VIII C SWINA DEDED DEDED	APP SWII DE DED	is IN IE E	Type Ty	
Scheduled End w Deals Location	31/03/2021 •			Home Vice a colur Process Drag a colur Main Lipper Hiltrest Kloof	Save Layou ack Save Layou no header here to g Description	ut	n	SWINA DEDED DEDED DEDED	APP SWI DE DED DE DED DE DED	IS IN IE E E	Type Ty	
Scheduled End w Deals Location	31/03/2021 •			Home V V V V V V V V V V V V V	Archive and the second	ut	nn	VIII C SWINA DEDED DEDED	APP SWII DE DEDI DE DEDI DE DEDI DE DEDI	is IN IE E E R	Type Ty	

• 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*.



			Nev	v Deal Projec	t - BPO: Version 2.5.0.4	Example Compa	ny v2.5.0.0				ĺ.		
Home Equ	ipment / Locations	Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales :	Service	Reporting	Utilities	- 4	₽ ×
Ok Back	7												\$
Client Contact	Tarryn Snow CUST	OMER CONTAG	ст 🔻 *										
Contact Type	Project Manager		-										
Rental Deal													
Work Order Type	New Deal Sale		• •										
Description	B60004		* *										
Scheduled Start	24/03/2021	·											
Scheduled End	31/03/2021 -	·											
New Deals Location	Hillcrest		• م										
Assigned to	Steven Cooper				11								
	6 George Jame	nan es er a Young Dunna s Reddy Jeffer	away Svenson rson Rohrbaugh ran den Adendorf	Û ,									
Open Windows 🔻							User : JulandaK	01/10/202	1 Version	n: 2.5.0.4	Example Compa	any v2.5.	0.0 //

- 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*.



			New Deal Proj	ect - BPO: Version 2.4.0	0.11 - Example Co	ompany]	ĸ
Home Equi	pment / Locations Contract	Finance / HR	Inventory	Maintenance / Projects	Manufacturing	Procurement	Sales	Service	Reporting	Utilities	_ 8 :	×
Ok Back												
Process 4												\$
Client Contact	Tarryn Snow CUSTOMER CON	TACT 🔻										
Contact Type	Project Manager	•										
Rental Deal												
Work Order Type	Implementation		New Deal			1		×				
Description	B60004	÷ 1		The new deal project h	as been created, r	eference no. PR	J0000406.					
Scheduled Start	24/03/2021 -											
Scheduled End				-		_		_				
New Deals Location		• م		2		→	OK					
Assigned to	Steven Cooper	•										
Open Windows 🕶						User : Jula	andaK 2	4/03/2021	Version : 2.4	.0.11 E	Example Company	11

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*.



Maritan Navigati Invoice New Deal to W0 Project Format Order Invoice Link Hold Process Format Corrent/ Print Current/	2	Refresh		Export New	Print Proforma	Print Sales	Vorkspaces	Save Layout	Items New Deal		Forward Creat	Delete View	dd Edit
OrderNo Outcome Name OrderName OrderName OrderName OrderName OrderName OrderName OrderName OrderName OrderName Salars OrderName Salars OrderName Salars OrderName OrderName Salars Salars OrderName Salars Salars OrderName Salars Salars OrderName Salars Salars <th></th> <th></th> <th>order</th> <th>INEW O</th> <th></th> <th></th> <th>*</th> <th></th> <th></th> <th></th> <th></th> <th>Delete View</th> <th>dd Edit</th>			order	INEW O			*					Delete View	dd Edit
OrderNo CustomerCode CustomerName OrderStatusDesc OrderVale Currency OrderDate SelesmanName ExchangeRate TasRate OrderTime 01:			Current	4	Print	4		Format	4	Process	a Navigati a	tain	Main
Of:Of								4					
GR0000257 DER001 Derton / Technologies New order Capy of test 920.00 ZAR 09/01/2019 Blanca Surend 1.00 14.00 14.16:30 GR0000281 TIA001 Titan Group New order Capy of test 920.00 ZAR 09/01/2019 Blanca Surend 1.00 15.00 04:48:13 GR0000282 HOP001 Hope Works (Pty) Ltd New order 1234 920.00 ZAR 09/01/2019 Blanca Surend 1.00 15.00 04:48:13 GR0000284 HOP001 Hope Works (Pty) Ltd New order 1234 0.00 ZAR 09/01/2019 Blanca Surend 1.00 15.00 04:58:22 GR0000286 BEA01 Bearing and Shoe New order TestQuoteStatus 1,104.00 ZAR 09/01/2019 Blanca Surend 1.00 15.00 04:58:22 GR0000286 BEA01 Bearing and Shoe New order S745 99.360 ZAR 09/01/2019 Blanca Surend 1.00 15.00 05:60:46 GR00	DeptCode	OrderTime	TaxRate	ExchangeRate	SalesmanName	OrderDate	Currency	OrderValue	OrderDescription	OrderStatusDesc	CustomerName	CustomerCode	OrderNo
OR0000281 TA001 Titan Group New order Copy of test 920.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 16:47:51 OR0000282 HOP011 Hope Works (Pty) Ltd New order 1234 920.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:50:21 OR0000283 HOP001 Hope Works (Pty) Ltd New order 1234 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:50:21 OR0000285 BEA01 Bearing and Shee New order TextuoteStatus 1.104.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:59:22 OR0000286 BEA01 Bearing and Shee New order Rover 8745 93.60 ZAR 09/01/2019 Bianca Surend 1.00 15.00 05:06:46 OR0000287 APP001 Hope Works (Pty) Ltd New order test 15.00.0 ZAR 07/04/2020 Kame Pilay 1.00 15.00 05:06:46 <t< td=""><td>R C</td><td>R C</td><td>-</td><td>=</td><td>404</td><td>-</td><td>a 🛛 c</td><td>-</td><td>'s C</td><td>a 🗖 c</td><td>*@c</td><td>800</td><td>e 🛛 c</td></t<>	R C	R C	-	=	4 0 4	-	a 🛛 c	-	's C	a 🗖 c	*@c	8 0 0	e 🛛 c
OR0000282 HOP01 Hope Works (Pty) Ltd New order 1234 920.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:48:13 OR0000283 HOP01 Hope Works (Pty) Ltd New order test 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:50:21 OR0000284 HOP01 Hope Works (Pty) Ltd New order 1234 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:50:21 OR0000285 BEA011 Bearing and Shoe New order Total Cuputefftest 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:59:34 OR0000287 APR001 Apple Juce Inc New order Est 15.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:59:34 OR0000287 APR001 Hope Works (Pty) Ltd New order test 241,500.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 15.00 15.00 15.00		14:16:30	14.00	1.00	Bianca Du Toit	21/05/2018	ZAR	6,119.52		New order	Derton / Technologies	DER001	OR0000257
OR0000283 HOP01 Hope Works (Pty) Ltd New order test 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:50:21 OR0000284 HOP01 Hope Works (Pty) Ltd New order 1224 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:50:21 OR0000285 BEA01 Bearing and Shoe New order TestQuoteStatus 1.104.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:58:22 OR0000286 BEA01 Bearing and Shoe New order restQuoteStatus 1.00.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:58:22 OR0000287 AP0001 Apple Juice Inc New order test 15.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 05:66:46 OR0000287 NEW101 New Order test 150.00 ZAR 07/04/202 Kame Pilay 1.00 15.00 15:00 15:00 15:00 15:01 15:00 <td></td> <td>16:47:51</td> <td>15.00</td> <td>1.00</td> <td>Bianca Du Toit</td> <td>09/01/2019</td> <td>ZAR</td> <td>920.00</td> <td>Copy of test</td> <td>New order</td> <td>Titan Group</td> <td>TIA001</td> <td>OR0000281</td>		16:47:51	15.00	1.00	Bianca Du Toit	09/01/2019	ZAR	920.00	Copy of test	New order	Titan Group	TIA001	OR0000281
OR0000284 HOP01 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 TestQueteStatus 1,104.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 04:59:32 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 Juce Inc New order 545 99.36 ZAR 07/04/2019 Bianca Surend 1.00 15.00 05:06:46 OR0000370 NEV1011 New Outermer Test New order test 241,505.00 ZAR 07/04/2020 Kame Pilay 1.00 15.00 15:00 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01 15:01		04:48:13	15.00	1.00	Bianca Surend	09/01/2019	ZAR	920.00	1234	New order	Hope Works (Pty) Ltd	HOP001	OR0000282
OR0000285 BEA01 Bearing and Shoe New order TestQuoteStatus 1,104.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 0+58:22 OR0000286 BEA01 Bearing and Shoe New order quotereftest 0.00 ZAR 09/01/2019 Bianca Surend 1.00 15.00 0+59:24 OR0000287 APP001 Apple Juice Inc New order 8745 93:60 ZAR 09/01/2019 Bianca Surend 1.00 15.00 0+59:24 OR0000307 NPW101 New Outcomer Test New order test 241,500.00 ZAR 07/04/2020 Kame Pilay 1.00 15.00 0+59:23 OR0000303 PN0001 Prick Shoes New order Test email 241,895.60 ZAR 09/04/2020 Kame Pilay 1.00 15.00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00 15:00		04:50:21	15.00	1.00	Bianca Surend	09/01/2019	ZAR	0.00	test	New order	Hope Works (Pty) Ltd	HOP001	OR0000283
OR0000286 BEAD01 Bearing and Shoe New order quotereftest 0.00 ZAR 09/01/2019 Blanca Surend 1.00 15.00 04:39:34 OR0000287 APP0001 Apple Juice Inc New order 8745 993.60 ZAR 09/01/2019 Blanca Surend 1.00 15.00 0:506:46 OR0000297 NEW 101 New order test 15.00 ZAR 07/04/2020 Kame Pilay 1.00 15.00 16:00 15:00 16:00		04:51:52	15.00	1.00	Bianca Surend	09/01/2019	ZAR	0.00	1234	New order	Hope Works (Pty) Ltd	HOP001	OR0000284
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*.



• =	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*.



\$ =		New	w Deal Project - BPO: Version 2.4.0.	11 - Example Company			_ D 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