

SALES

NEW DEAL CALL SALE / RENTAL PROCESS

A New Deal is the processing of a new sale from start to finish - from quote through to final invoice, where a call or project is created to track work in progress before invoicing.

NEW DEAL CALL

New Deal Call is a sales process that will create a **Call** for work to be done and invoiced upon completion. This is designed for a single sale without a complicated work requirement, such as a new equipment installation.

- This is a 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

- This is a rental to a client where the item remains the company property.
- 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 cannot be raised against internal assets, but can be raised for any other 'billable' items logged on the call e.g. time and expenses.

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1. [Create a Quote \(optional\)](#)
 2. Create an Order
 3. Create New Deal (this creates a Call)
 4. [Assign 'Walk In' Warranty to Machine](#) (for item sale only)
 5. Requests:
 - i. [Request Parts](#) (parts added to Sales Order will automatically be requested)
 - ii. [Part Request Authorisation](#)
 - iii. [Issue Stock/Issue Asset](#)
 6. Services:
 - i. [Request Services](#) (e.g. Customer machine repair by Supplier)
 - ii. [Service Requisition Cycle](#)
 7. Update Call Costs:
 - i. [Log Labour Time](#)
 - ii. [Log Expenses](#)
 - iii. [Log Travel](#)
 - iv. [Update Meter Reading](#) (if not logged at Call creation)
 8. [Create Invoice from Call](#)
 9. [Close Call](#)

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