

We are currently updating our site; thank you for your patience.

# PROCESS FLOWS

## NEW BUSINESS – SALES

### 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.

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](#)

PRC.SALS.NDSC