

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

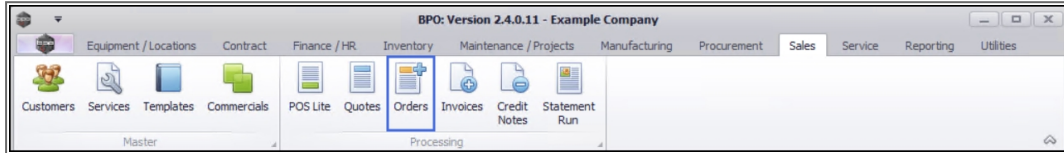
- Sale to the client (or via a finance house) where the item(s) become the customer's property.
- Serialised items will become Customer Assets.
- The part request is automatically logged against the 'Stock Warehouse'.
- An invoice must be raised for all 'billable' items.

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.

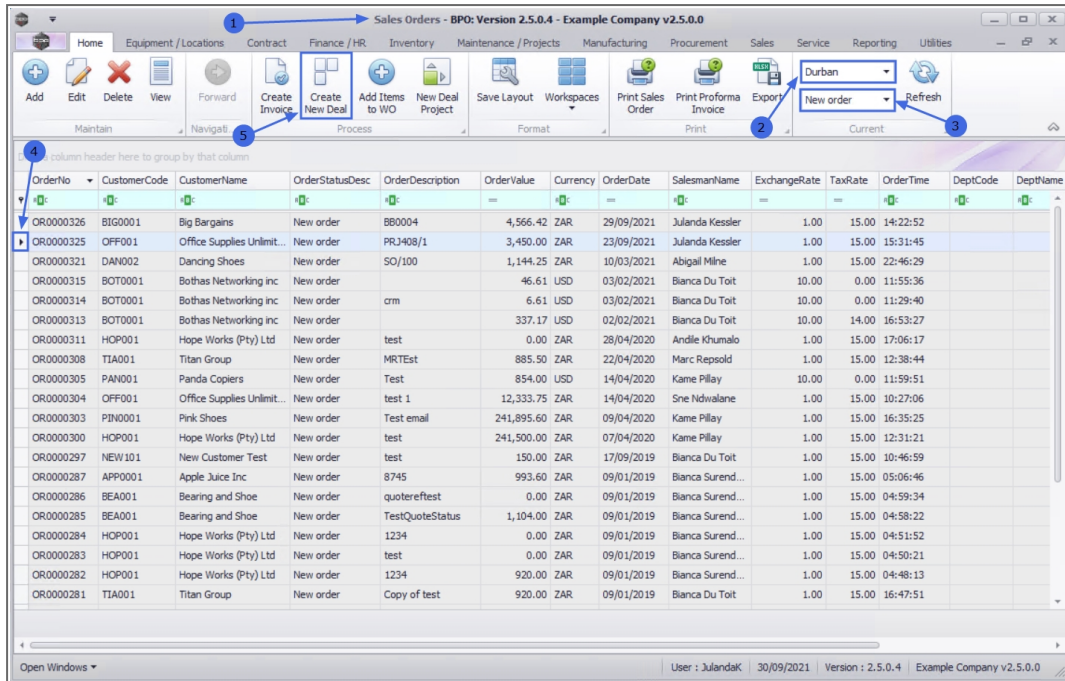
Ribbon Access: Sales > Orders



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

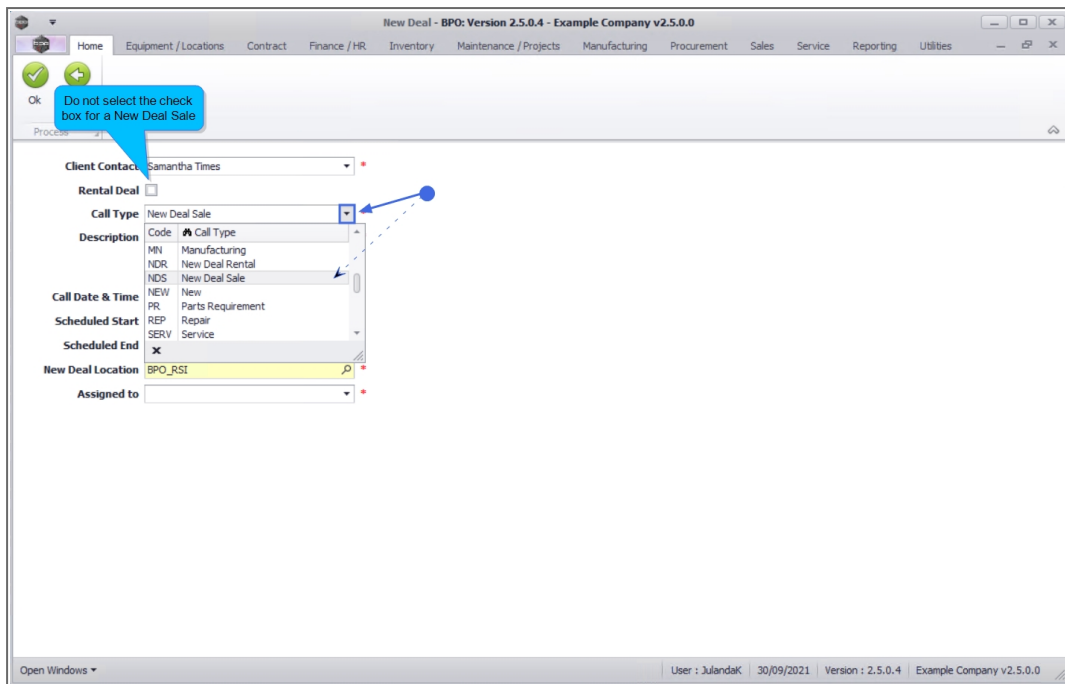
4. Select the **row** of the Sales Order that you wish to convert to a **New Deal Sale**.
5. Click on **Create New Deal**.



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

NEW DEAL INFORMATION

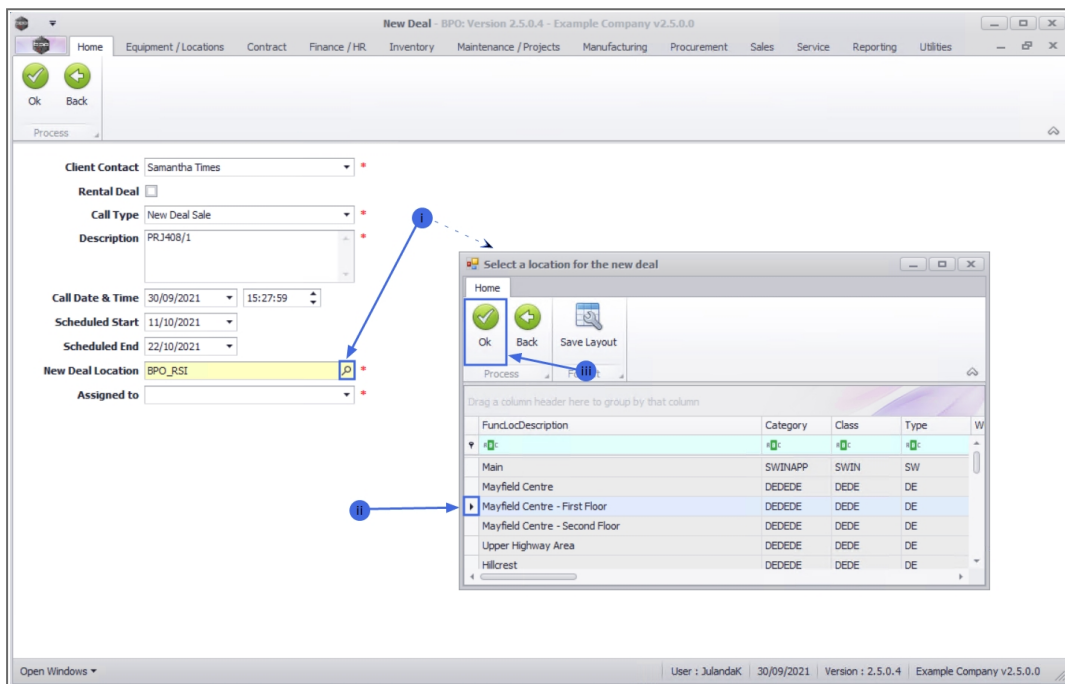
- **Client Contact:** This field will auto populate with the contact selected on the sales order. Click on the down arrow to select an alternative client contact, if required.
- **Rental Deal:**  Do not select this check box for a New Deal Sale.
- **Call Type:** If this field has not populated with the 'New Deal Sale' call type, click on the down **arrow** to select 'New Deal Sale' from the menu.



- **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.

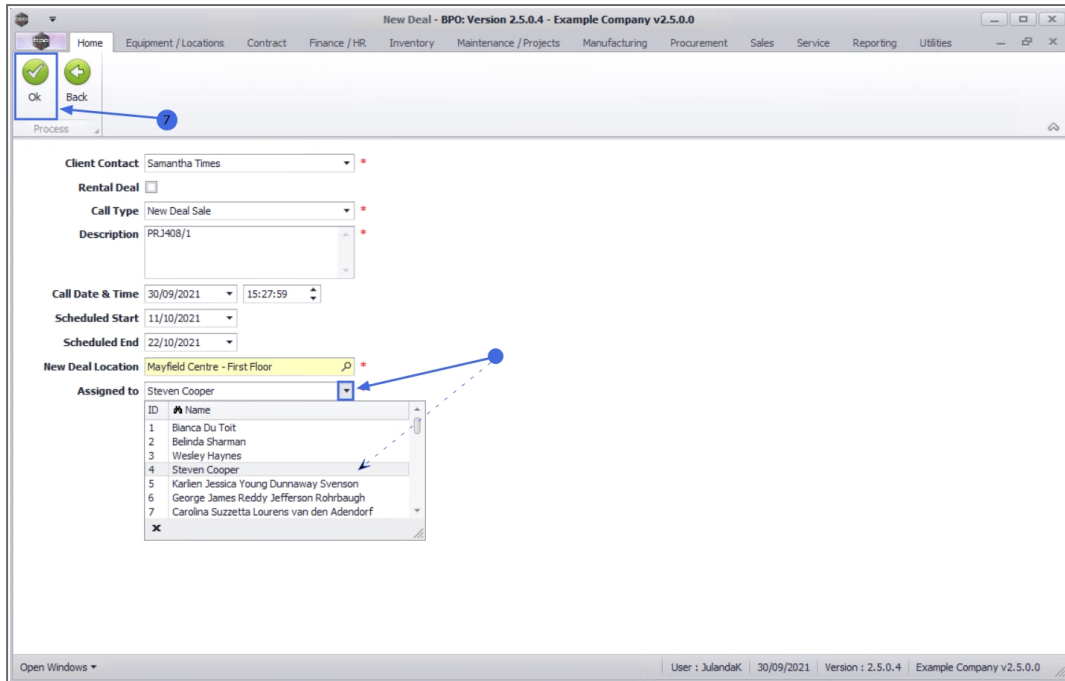
- **New Deal Location:** The field will auto populate if a Functional Location has been set up. To select, or to change the location for the new deal,
 - i. Click on the **search button** to display the **Select a location for the new deal** screen.
 - ii. Click on the **row** of the location for the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



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

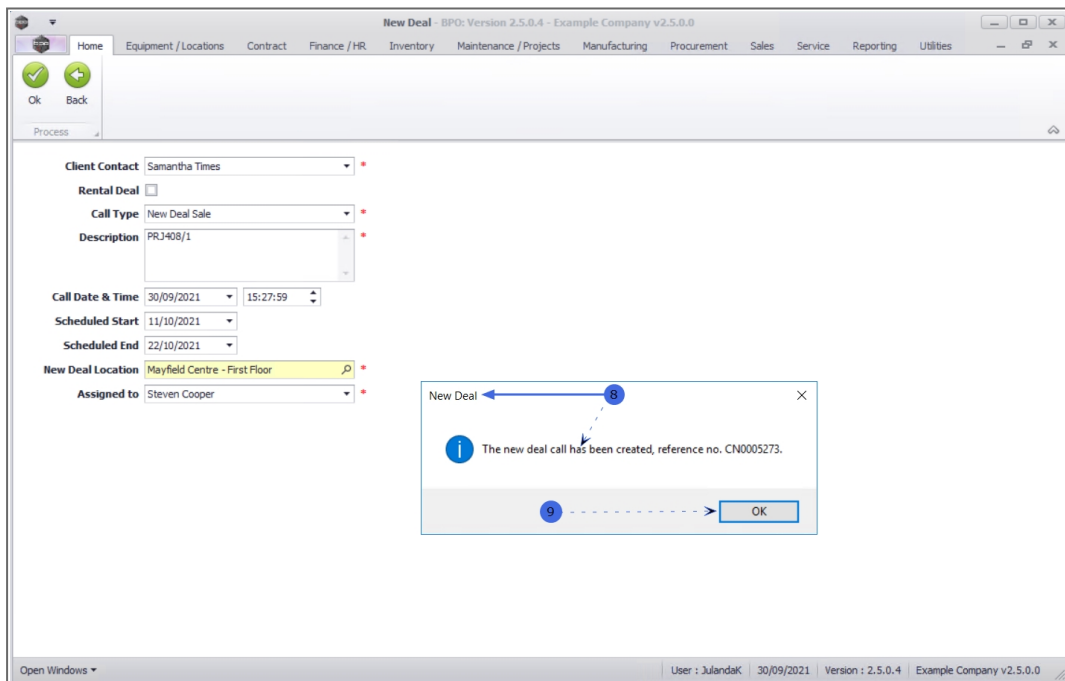
SAVE NEW DEAL SALE

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**.

The screenshot shows the 'Sales Orders - BPO: Version 2.4.0.11 - Example Company' window. The 'Create New Deal' button in the top toolbar is highlighted with a blue circle and labeled '3'. A dropdown menu is open, showing 'Durban' and 'New order' (highlighted with a blue circle and labeled '1'). A blue arrow labeled '2' points to the selected row in the table below.

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	BET001	Bettes 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	APP001	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	APP001	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	PIN001	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 Unlimt...	New order	test 1	12,333.75	ZAR	14/04/2020	Sne Ndwalane	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	

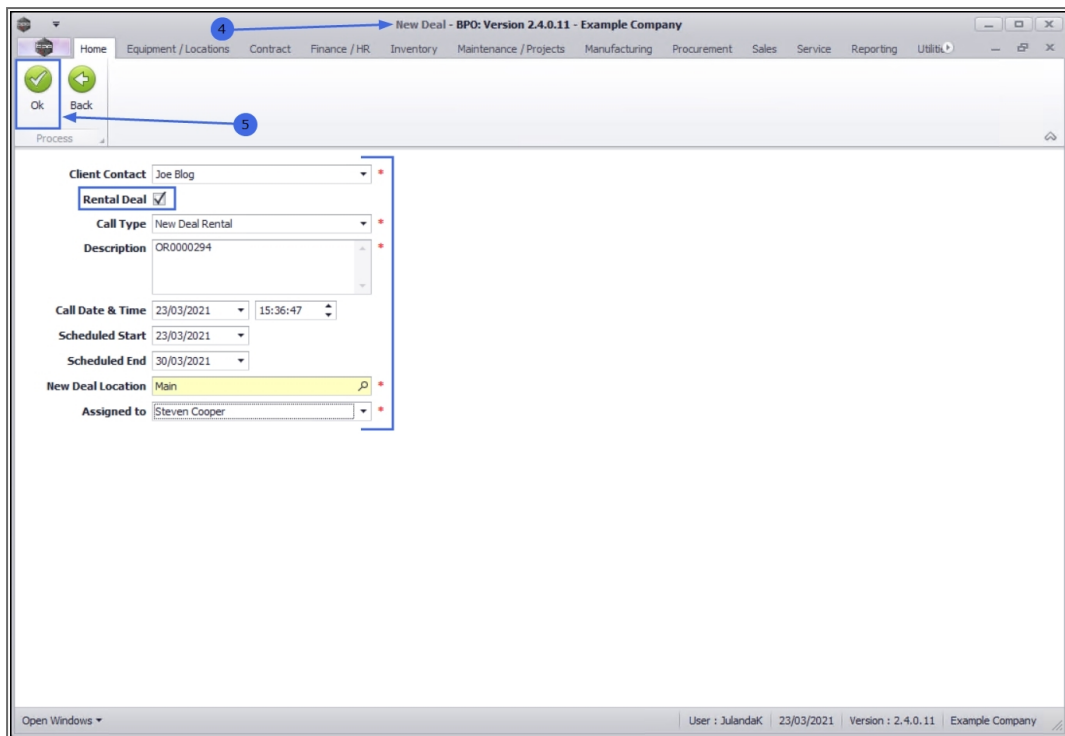
4. The **New Deal** screen will be displayed.

NEW DEAL RENTAL INFORMATION

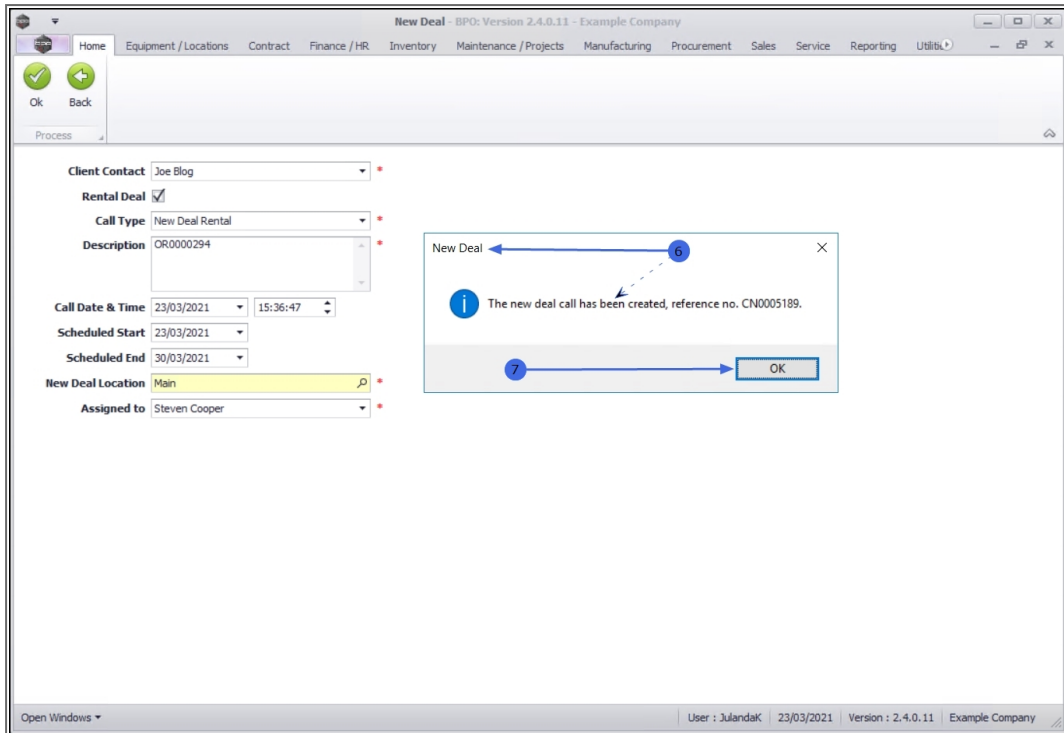
- **Client Contact:** The field will be updated with the contact selected on the sales order.
- **Rental Deal:**  The rental deal check box must be ticked for New Deal **Rental**.
- **Call Type:** The field should be populated with the 'New Deal Rental' call type, else click on the **arrow** to select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