

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 <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.
- 1. <u>Create a Quote (optional)</u>
- 2. Create an Order
- 3. Create New Deal (this creates a Call)
- 4. <u>Assign 'Walk In' Warranty to Machine</u> (for item sale only)
- 5. Requests:
 - i. <u>Request Parts</u> (parts added to Sales Order will automatically be requested)
 - ii. Part Request Authorisation
 - iii. Issue Stock/Issue Asset
- 6. Services:
 - i. <u>Request Services</u> (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. <u>Close Call</u>

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