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 (For example: 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

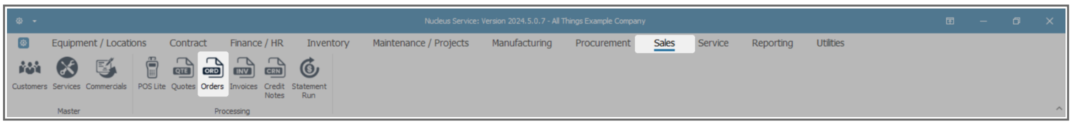
- Sale to the client (or via a finance house) where the item(s) become the customer's property.
- Serialised items will become Customer Assets.
- The part request is automatically logged against the 'Stock Warehouse'.
- An invoice must be raised for all 'billable' items.

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 <u>cannot</u> be raised against internal assets, but <u>can</u> be raised for any other 'billable' items logged on the call, e.g., time and expenses.

Ribbon Select **Sales > Orders**

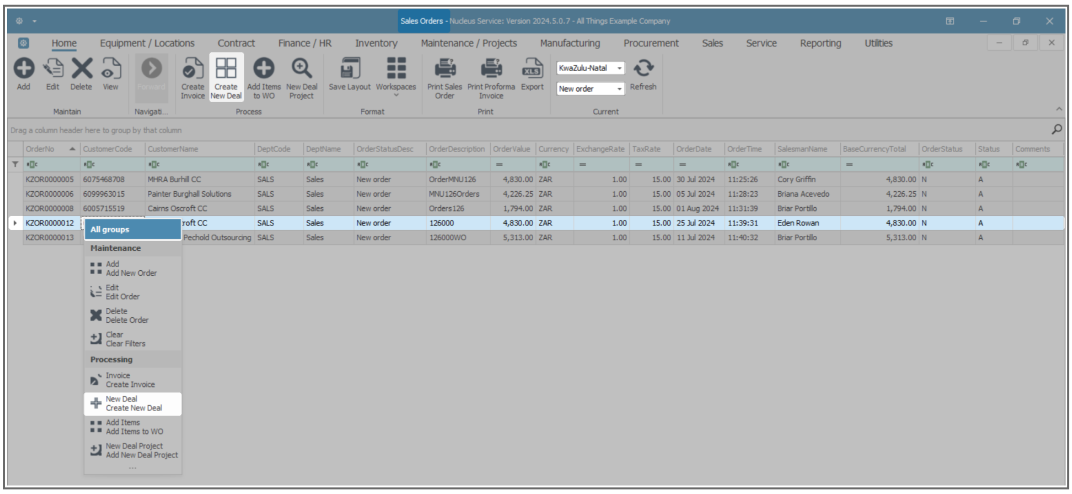


- The **Sales Orders** listing screen will be displayed.
- Select the **Site** where the Sales Order can be located.
  - The example has **KwaZulu-Natal** selected.
- The **Status** must be set to **New Order**.

NEW DEAL SALE

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

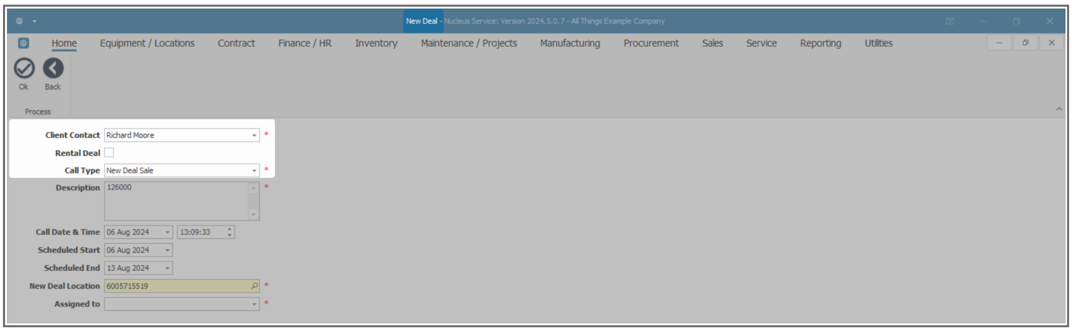
Short cut key: Right click on the selected **row** in the data grid to display the **All Groups** menu list. Click on **New Deal**.



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

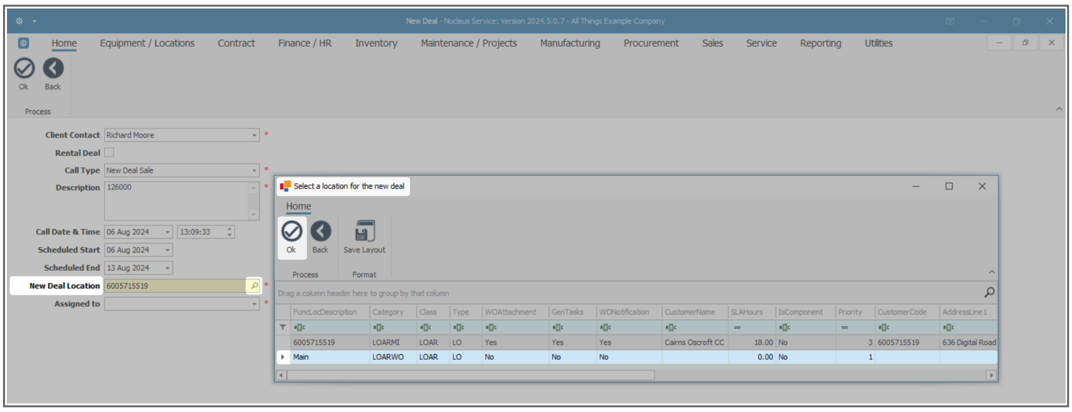
NEW DEAL INFORMATION

- **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 **drop-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 **drop-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.

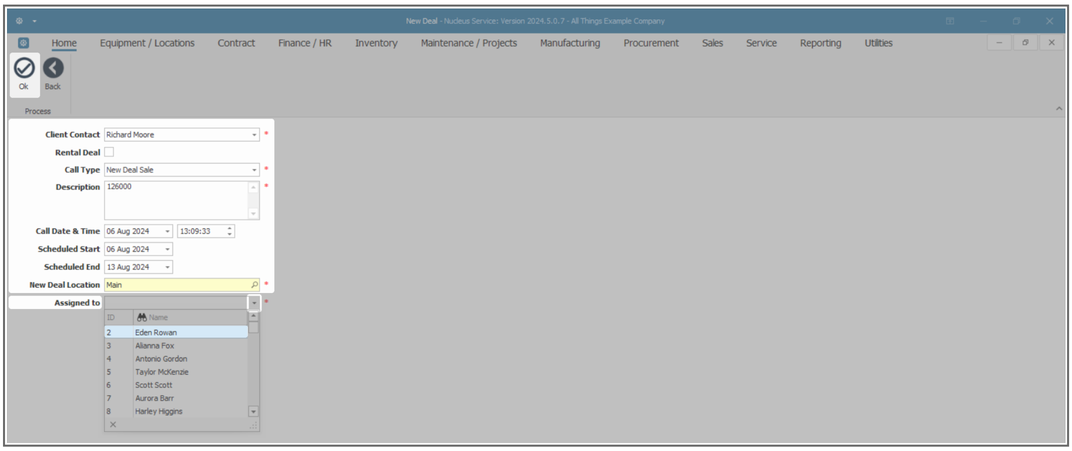
- **Scheduled Start:** The current date will display in the field.
  - To change the scheduled start date, type in or click on the **drop-down arrow** to select an alternative date, using the calendar function.
- **Scheduled End:** The scheduled end date will be calculate for 7 days from the scheduled start date.
  - To change the scheduled end date, type in or click on the **drop-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,
  - Click on the **search icon** to display the **Select a location for the new deal** screen.
  - Select the **row** of the location for the new deal.
  - Click on **OK**.



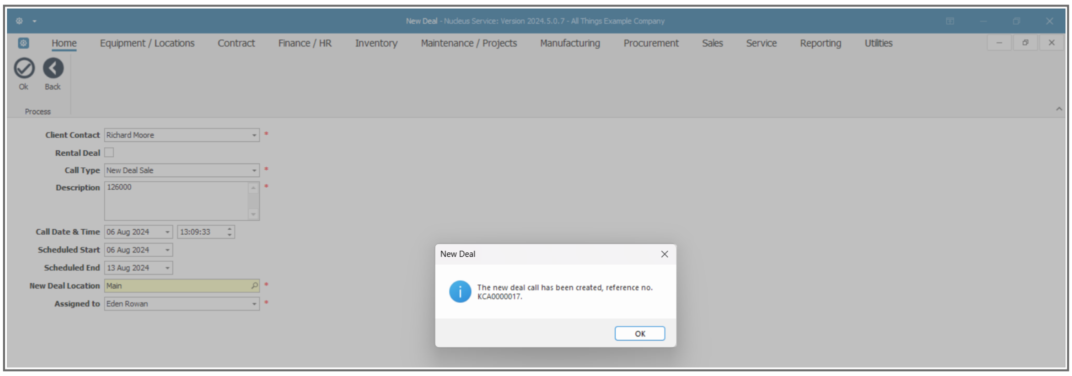
- **Assigned to:** Click on the **drop-down arrow** to select the person this new deal will be assigned to.

SAVE NEW DEAL SALE

- When you have finished completing the new deal information, click on **OK**.



- When you receive the **New Deal** message to confirm -
  - **The new deal call has been created, reference no. KCA [ ]**
- Click on **OK**.



- You will return to the **Sales Orders** listing screen.

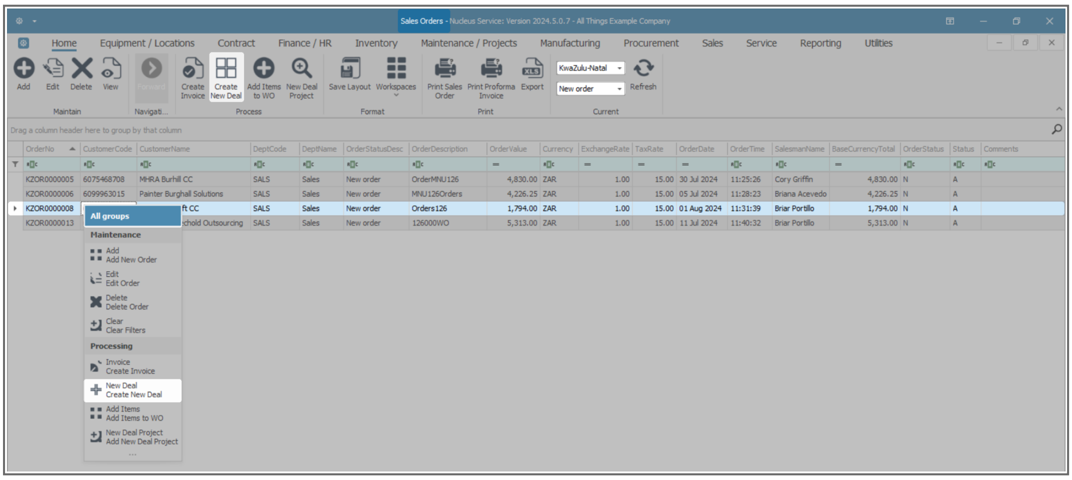
The Sales Order will no longer be available from the New Order Status list. To **view**: change the Status to the **Invoiced Order** Status on the **Sales Orders** listing screen.

- The New Deal Sale has now been assigned to the Call Listing screen where it can be viewed.

NEW DEAL RENTAL

- Ensure that the correct **Site** has been selected and that the **Status** is set to **New Order**.
- Select the **row** of the Sales Order that you wish to convert to a **New Deal Rental**.
- Click on **Create New Deal**.

Short cut key: Right click on the selected **row** in the data grid to display the **All Groups** menu list. Click on **New Deal**.



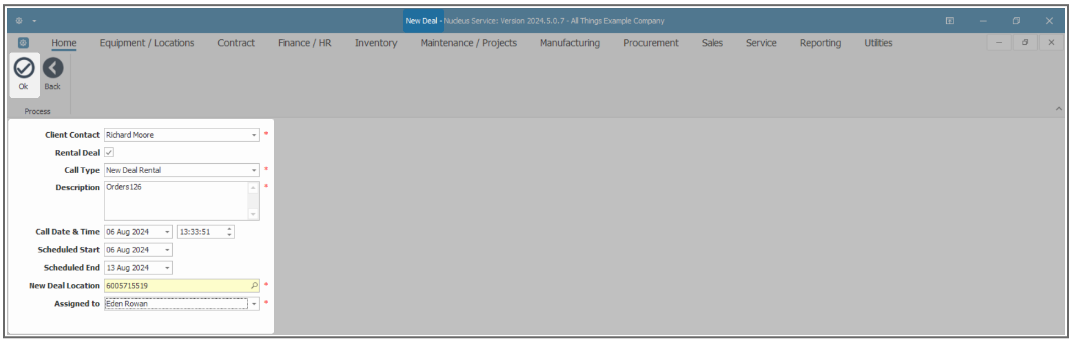
- The **New Deal** screen will be displayed.

NEW DEAL RENTAL INFORMATION

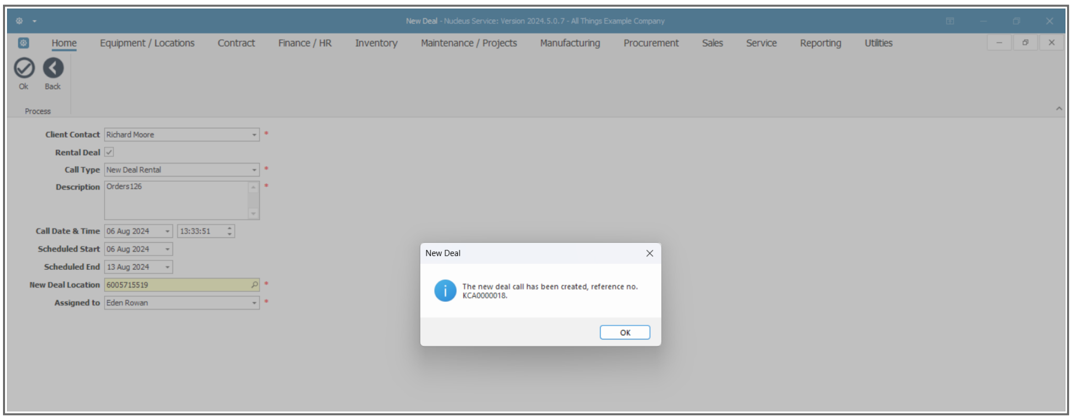
- **Client Contact:** The field will be updated with the contact selected on the sales order.
- **Rental Deal:** The rental deal check box **must** be ticked for New Deal **Rental**.
- **Call Type:** The field should populate with the 'New Deal Rental' call type, else click on the **drop-down arrow** 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 **drop-down 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 **drop-down 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. To select, or to change the location for the new deal,
    - Click on the **search button** to display the **Select a location for the new deal** screen.
    - Select the **row** of the location for the new deal.
- **Assigned to:** Click on the **drop-down arrow** to select the person this new deal will be assigned to.

SAVE NEW DEAL RENTAL

- When finished completing the new deal information, click **OK**.



- When you receive the **New Deal** message to confirm -
  - **The new deal call has been created, reference no. KCA [ ].**
- Click on **OK**.



- You will return to the **Sales Orders** listing screen.

> The Sales Order will no longer be available from the New Order Status list. To **view**: change the Status to the **Invoiced Order** Status on the **Sales Orders** listing screen.

- The New Deal Rental has now been assigned to the Call Listing screen where it can be viewed.
- Refer to Service - Introduction to Calls for detailed information.

Related Topics

- Add a Sales Order
- Edit a Sales Order
- Delete a Sales Order
- View a Sales Order
- Print / Email a Sales Order
- Print Proforma Invoice
- Export Sales Order List
- Create Sales Invoice from Sales Order
- Create New Deal Sale / Rental (creates a call)
- Create New Deal Project Sale / Rental

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