

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](#)

## **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.

- 
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](#)

RSI.PRC.006

