

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

PROJECTS

NEW DEAL PROJECT SALE/RENTAL PROCESS

New Deal Project is a sales process that will create a Project for work to be done and invoiced upon completion. This particular process is designed for a more complex work requirement, with multiple Work Orders for various aspects of the Project. A Project Methodology can also be applied.

- **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 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 Project**
4. **Assign 'Walk In' Warranty to Machine** (for machine sale only)
5. **Requests:**
 - a. **Request Parts** (parts added to Sales Order will automatically be requested)
 - b. **Part Request Authorisation**
 - c. **Issue Stock / Issue Asset**
6. **Services:**
 - a. **Request Services** (e.g. Customer machine repair by Supplier)
 - b. **Service Requisition Cycle**
7. **Update Call Costs:**
 - a. **Log Labour Time**
 - b. **Log Expenses**
 - c. **Log Travel**
8. **Create Invoice from Project**
9. **Close Project**

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