

SALES

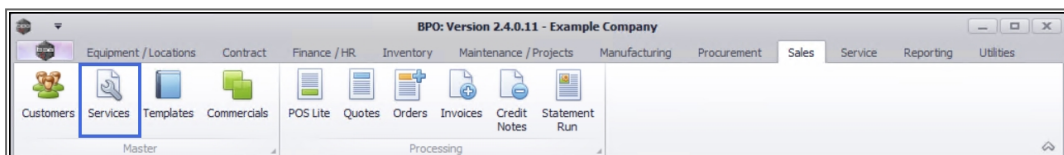
INTRODUCTION TO SERVICES

A service is a non-stock item provided to your client:

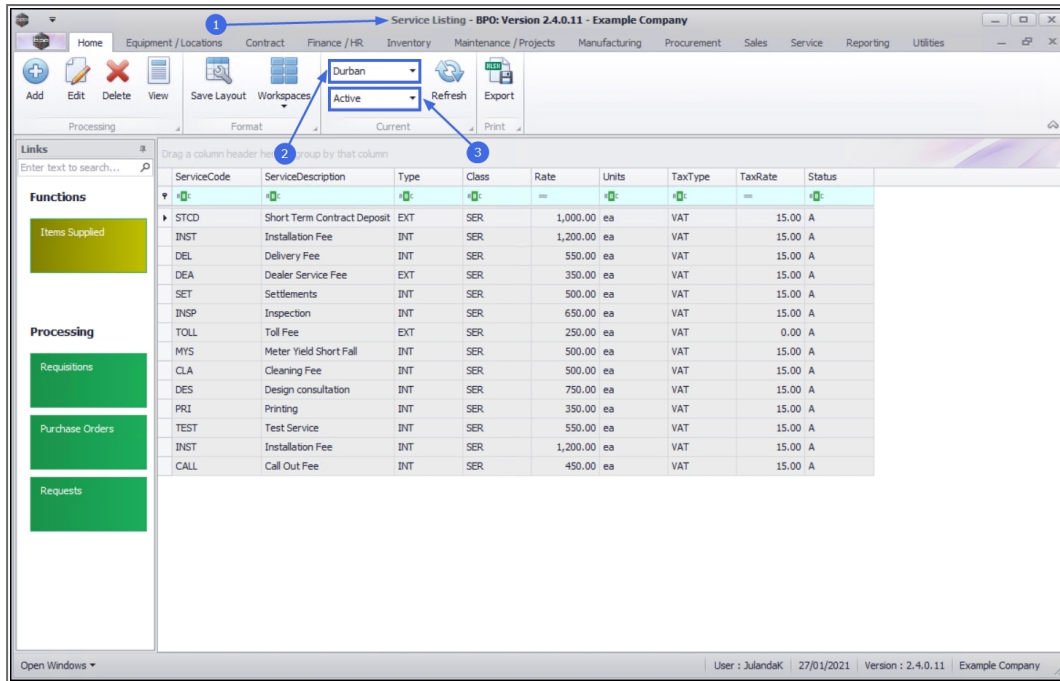
- **Internal Service (INT)** : Is a service performed by the company.
- **External Service (EXT)** : Is any service performed by a third party supplier, via purchase order and non-Stock GRN.

Services can be set to **Billable** or **Non-Billable**.

Ribbon Access: *Sales > Services*



1. The **Service Listing** screen will be displayed.
2. Select the **Site** that you wish to work in.
 - The example has **Durban** selected.
3. Select the **Status**.
 - There are 2 statuses: **Active** and **Inactive**. You will most likely be working in the **Active** status. The example therefore has **Active** selected.



SERVICE LISTING SCREEN

The action buttons on the ribbon menu will be available (bold) or unavailable (greyed out) depending on the **Status** filter you have selected.

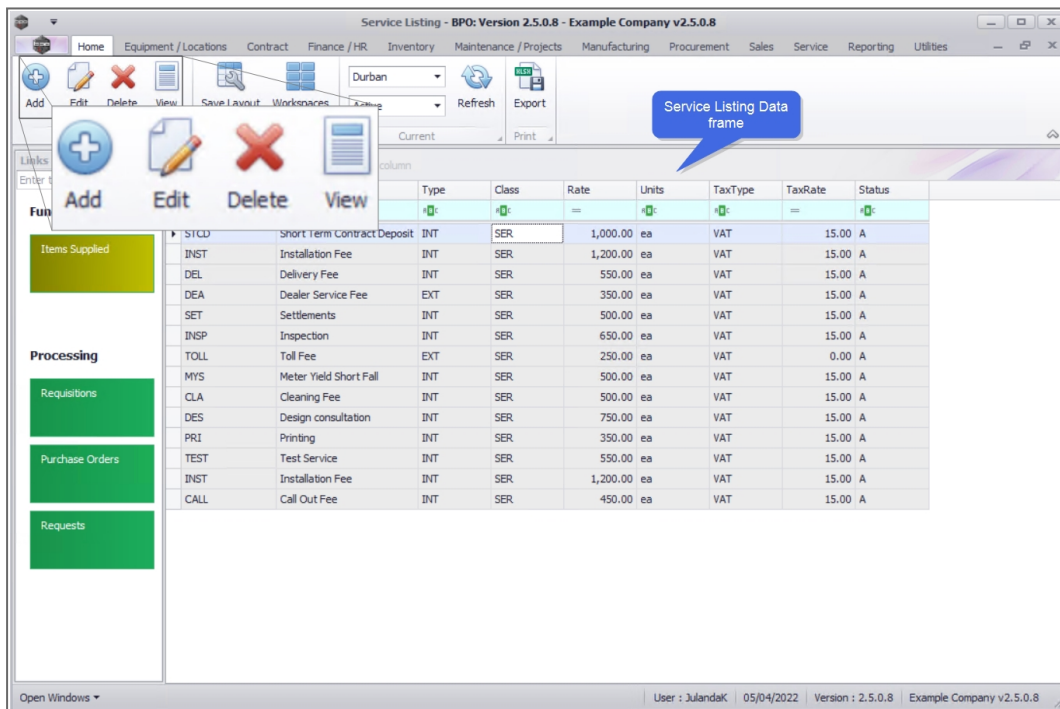
SERVICE LISTING DATA FRAME

- **Service Code:** The service creation code when the service was added.
- **Service Description:** A description linked to the service code.
- **Type:** The service type is either INT for an Internal or EXT for an External service
- **Class:** The class can be **CTRT** - Contract Related, **IMPL** - Implementation or **SER** - Service
- **Rate:** The rate amount being charged for the service.
- **Units:** The unit identified with the service, e.g. hourly rate being charged for an Inspection.

- **Tax Type:** The type of Tax that is being charged for the service, e.g. VAT.
- **Tax Rate:** The percentage Tax rate being charged for the service.
- **Status:** The Status selection **Active** will list all [A]ctive sales services. Changing the Status to **Inactive** will change the listing to view all [I]nactive sales services.

RIBBON TOOLBAR

- Click on **Add** to create a new Service. Refer to [Services - Add a Service](#)
- Click on **Edit** to make changes to the information on an existing Service. Refer to [Services - Edit a Service](#)
- Click on **Delete** to remove a Service that is no longer required. Refer to [Services - Delete a Service](#)
- **View** enables you to view information about a Service. Refer to [Services - View a Service](#)



The screenshot displays the 'Service Listing - BPO: Version 2.5.0.8 - Example Company v2.5.0.8' application. The ribbon toolbar at the top includes tabs for Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. The 'Service' tab is active, showing a ribbon with 'Add', 'Edit', 'Delete', and 'View' buttons. A 'Service Listing Data frame' callout points to the data table below the toolbar. The table has columns for Type, Class, Rate, Units, TaxType, TaxRate, and Status. The data is as follows:

Type	Class	Rate	Units	TaxType	TaxRate	Status
INT	SER	1,000.00	ea	VAT	15.00	A
INT	SER	1,200.00	ea	VAT	15.00	A
INT	SER	550.00	ea	VAT	15.00	A
EXT	SER	350.00	ea	VAT	15.00	A
INT	SER	500.00	ea	VAT	15.00	A
INT	SER	650.00	ea	VAT	15.00	A
EXT	SER	250.00	ea	VAT	0.00	A
INT	SER	500.00	ea	VAT	15.00	A
INT	SER	500.00	ea	VAT	15.00	A
INT	SER	750.00	ea	VAT	15.00	A
INT	SER	350.00	ea	VAT	15.00	A
INT	SER	550.00	ea	VAT	15.00	A
INT	SER	1,200.00	ea	VAT	15.00	A
INT	SER	450.00	ea	VAT	15.00	A

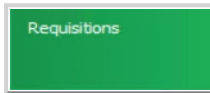
The interface also includes a left sidebar with 'Items Supplied', 'Processing', 'Requisitions', 'Purchase Orders', and 'Requests' sections. The bottom status bar shows 'User : JulandaK', '05/04/2022', 'Version : 2.5.0.8', and 'Example Company v2.5.0.8'.

FUNCTIONS TILE

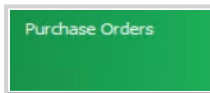


The [Items Supplied tile](#) provides a list of the suppliers linked to the service. You can **Add**, **Edit** or **Delete** suppliers to a Service. Refer to [Services - Items Supplied](#)

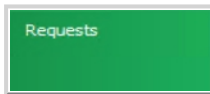
PROCESSING TILES



The [Requisitions tile](#) displays a list of purchase requisitions for a selected service. You can **Add**, **Edit** or **Delete** a purchase requisition for the service. Refer to [Services - Purchase Requisitions](#)



The [Purchase Orders tile](#) will direct you to the Service Listing screen where you can **View**, **Print**, or **Close** a Purchase Order, access the purchase order **Notes**, view the purchase order **Address** or **Delivery Instructions**. Refer to [Services - Purchase Orders](#)



The [Requests tile](#) will display a list of all the Service Requests linked to the Service. Refer to [Services - Requests](#)

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