

SALES

SERVICES - ADD A SERVICE

Ribbon Access: Sales > Services



- 1. The *Service Listing* screen will display.
- 2. Select the *Site* where you wish to create the service.
 - The example has *Durban* selected.
- 3. You do not need to specify a *Status* as the new service can be created in any status. The new service will however display in the *Active* status screen.
 - The example has therefore *Active* selected.
- 4. Click on Add.

Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.



| nter text to search) | 0 ServiceC | nn header here to group by that column ode ServiceDescription | Turne | Class | Rate | Units | TauTune | TaxRate | Status | | |
|-----------------------|---------------|---|-------|------------|----------|-------|---------|---------|--------|--|--|
| Functions | P REC | alle | Type | class # | = | ill: | TaxType | | status | | |
| Functions | STCD | Short Term Contract Deposit | | SER | 1,000.00 | _ | VAT | 15.00 | - | | |
| Items Supplied | INST | Installation Fee | INT | SER | 1,000.00 | | VAT | 15.00 | | | |
| | DEL | Delivery Fee | INT | SER | 550.00 | | VAT | 15.00 | | | |
| | DEA | Dealer Service Fee | EXT | SER | 350.00 | | VAT | 15.00 | | | |
| | SET | Settlements | INT | SER | 500.00 | ea | VAT | 15.00 | A | | |
| | INSP | Inspection | INT | SER | 650.00 | ea | VAT | 15.00 | A | | |
| Processing | TOLL | Toll Fee | EXT | SER | 250.00 | ea | VAT | 0.00 | A | | |
| | MYS | Meter Yield Short Fall | INT | SER | 500.00 | ea | VAT | 15.00 | A | | |
| Requisitions | CLA | Cleaning Fee | INT | SER | 500.00 | ea | VAT | 15.00 | A | | |
| | DES | Design consultation | INT | SER | 750.00 | ea | VAT | 15.00 | A | | |
| | PRI | Printing | INT | SER | 350.00 | ea | VAT | 15.00 | Α | | |
| Purchase Orders | TEST | Test Service | INT | SER | 550.00 | ea | VAT | 15.00 | Α | | |
| | INST | Installation Fee | INT | SER | 1,200.00 | | VAT | 15.00 | | | |
| | CALL | Call Out Fee | INT | SER | 450.00 | ea | VAT | 15.00 | Α | | |

5. The *Add new Service* screen will display.

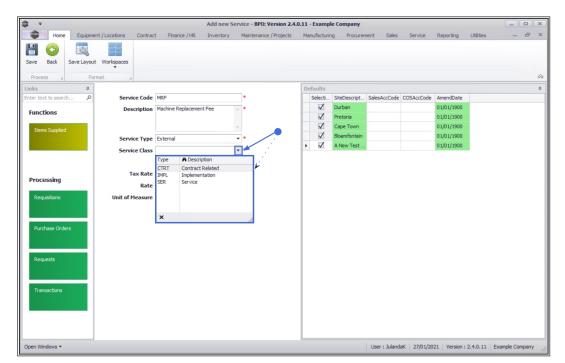
NEW SERVICE DETAILS FRAME

- Service Code: Type in a code that identifies the new service.
- **Description:** Type in the description for the new service.
- Service Type: Click on the down *arrow* to select the Service Type from the drop-down menu.
 - The example has *External* selected.



| \$ • 5 | None Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities — Image: service None e Back Format Image: service Format Image: service None Image: service None Image: service Service Amendbate Image: service None None <t< th=""></t<> | | | | | | | |
|--|---|---------|--------------|--------------|-----------------|--------------|---|--|
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| Save Back Save Layout Workspaces | | | | | | | | \$ |
| Links a | | De | faults | | | | | ų. |
| Enter text to search, P Service Code | MRF * | | Selecti | SiteDescript | SalesAccCode | COSAccCode | AmendDate | |
| Description | Machine Replacement Fee * | | \checkmark | Durban | | | 01/01/1900 | |
| Functions | | | | Pretoria | | | | |
| Items Supplied | · · · · · · · · · · · · · · · · · · · | | | | | | AmendDate 01/01/1900 01/01/1900 01/01/1900 01/01/1900 | |
| Service Type | | | | | | | | 01/01/1900 01/01/1900 01/01/1900 01/01/1900 |
| Service Class | | • | \checkmark | A New Test | | | 01/01/1900 | |
| Processing Rate Requisitions Unit of Measure Purchase Orders | EXT External L INT Internal | | | | | | | |
| Open Windows 🕶 | U | ser : 1 | JulandaK | 02/11/2021 | Version : 2.5.0 | .4 Example | Company v2.5 | 5.0.0 |

• Service Class: Click on the down *arrow* to select the service class that applies to your service type.



• The example has *Contract Related* selected.



• Tax Rate: Click on the down *arrow* to select the tax rate applicable to this service from the drop-down list.

| Add new Service - BPO: Version 2.4.0.11 - Example Company | | | | | | | | | | | | |
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| Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities | 8 X | | | | | | | | | | | |
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| Functions Description Machine Replacement Fee | | | | | | | | | | | | |
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| Items Supplied Service Type External | | | | | | | | | | | | |
| Service Type External Service A New Test 01/01/1900 | | | | | | | | | | | | |
| Processing Tax Rate 15.00 Regustions Unit of Heasure 0.00 Purchase Orders 15.00 Regusts Transactions | | | | | | | | | | | | |
| Open Windows ▼ User : Julandak 27/01/2021 Version : 2.4.0.11 Example C | ompany | | | | | | | | | | | |

- Rate: *Type* in or use the *directional arrows* to select the rate or price per unit of measure for the sevice, e.g. **250**.
- Unit of Measure: Click on the *drop-down arrow* and to list the unit of measure.
 - The example has *Per Hour* selected.



| | Add new Service - BPO: Version 2.4.0 | .11 - Example Compan | у | | _ — X |
|---|---|----------------------|---------------------|------------------------|--------------------------|
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| Functions Description | Machine Replacement Fee 💫 * | Durban | | 01/01/1900 | |
| Tunctons | | Pretoria | | 01/01/1900 | |
| Items Supplied | Ψ. | Cape Tow | | 01/01/1900 | |
| Service Type | External 👻 * | Bloemfont | | 01/01/1900 | |
| Service Class | Contract Related 🔹 * | A New Tes | t | 01/01/1900 | |
| Processing Tax Rate Regulations Purchase Orders Request: Transactions | 15.00 | | | | |
| Open Windows 🔻 | | | User : JulandaK | 27/01/2021 Version : 2 | 2.4.0.11 Example Company |

DEFAULTS FRAME

- 6. Click in the *check box(es)* of the *site(s)* you wish to link or un-link the new service you are creating.
- Type in the relevant Pastel Sales Account Codes and COS Account Codes for each site you are linking.
- 8. When you have finished adding details to the Defaults frame, click on *Save*.



| Back Save Layout Workspaces Process Format Back Save Layout Workspaces Format Process Format Back Service Code MRF Service Format Back Service Code Machine Replacement Fee Service Type Service Type External Service Class Contract Related Service Class Contract Related Tax Rate 15.00 | | | | | | | | | | |
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| Image: Processing Regulations Contract Processing Regulations Regulations Regulations Regulations | | | | | | | | | | |
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| Eunctions Description | Machine Replacement Fee | • | Ø. | \checkmark | Durban | 1000 | 2000 | 01/01/1900 | | |
| Functions | | | | | Pretoria | | | | | |
| Items Supplied | Ψ | | | | | | | | | |
| Service Type | External - | • | | | | | | | | 3 |
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| Purchase Orders | s Description Machine Replacement Fee poind poind Service Type External Service Class Contract Related Tax Rate 15.00 Tax Rate 250 Tax Rate Per Hour Total | | | | | | | | | |
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| | | | | | | | COSAccCode AmendDate 2000 01/01/1900 01/000 01/00 01/00 01/00 01/00 00/00 00 | | | |
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| Open Windows 🕶 | | | - | | | User : Juland | aK 27/01/20 | 21 Version : | 2.4.0.11 E | ample Company |

9. You will return to the *Service Listing* screen.

10. The new service has been added to the list.

| | | ocations C | Contract Finar | nce / HR Ir Durban | ventory | Main | tenance / I | Projects Man | ufacturing | Procurement | Sales Se | rvice Repo | orting Utilitie | 25 | - 6 | 2 |
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| | | | | Durban | | 57 | | | | | | | | | | |
| dd Edit Delete | View | Save Layout | Workspaces | Active | | fresh | Export | | | | | | | | | |
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| nks | 4 | | | | | | | | | | | | | | | |
| | Q | | | | | | | | | | | | | 1 | 1 | |
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| | ST | CD | Short Term Co | | EXT | SE | R | 1,000.00 | | VAT | 15.00 | | | | | |
| Items Supplied | IN | | Installation Fee | e | INT | SE | | 1,200.00 | | VAT | 15.00 | | | | | |
| | DE | | Delivery Fee | | INT | SE | | 550.00 | | VAT | 15.00 | | | | | |
| | DE | | Dealer Service | Fee | EXT | SE | | 350.00 | | VAT | 15.00 | | | | | |
| | SE | | Settlements | | INT | SE | | 500.00 | | VAT | 15.00 | | | | | |
| | IN | | Inspection | | INT | SE | | 650.00 | | VAT | 15.00 | | | | | |
| Processing | TO | | Toll Fee | | EXT | SE | | 250.00 | | VAT | 0.00 | | | | | |
| Descent of the sec | MY | | Meter Yield Sho | ort Fall | INT | SE | | 500.00 | | VAT | 15.00 | | | | | |
| Requisitions | a | | Cleaning Fee | | INT | SE | | 500.00 | | VAT | 15.00 | | | | | |
| | DE | | Design consult | ation | INT | SE | | 750.00 | | VAT | 15.00 | | | | | |
| | PR | | Printing | | INT | SE | | 350.00 | | VAT | 15.00 | | | | | |
| Purchase Orders | TE | | Test Service | | INT | SE | | 550.00 | | VAT | 15.00 | | | | | |
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| Requests | ► MR | (F | Machine Repla | cement Fee | EXT | C | IRT | | | VAT | 15.00 | A | | | | |
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