

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*.



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	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		
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Purchase Orders	TEST	Test Service	INT	SER	550.00	ea	VAT	15.00	Α		
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	CALL	Call Out Fee	INT	SER	450.00	ea	VAT	15.00	Α		

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

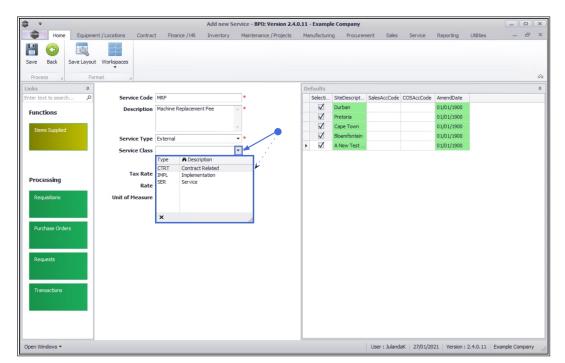
NEW SERVICE DETAILS FRAME

- 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.



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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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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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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*.



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

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

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	DE		Dealer Service	Fee	EXT	SE		350.00		VAT	15.00					
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