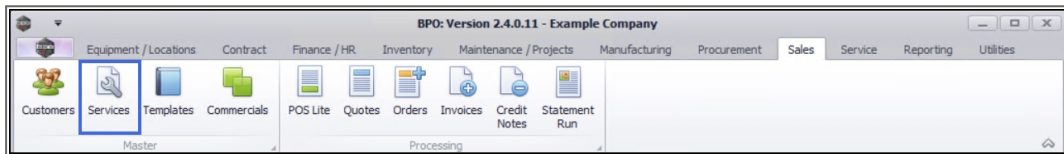


SALES

SERVICES – ADD A SERVICE

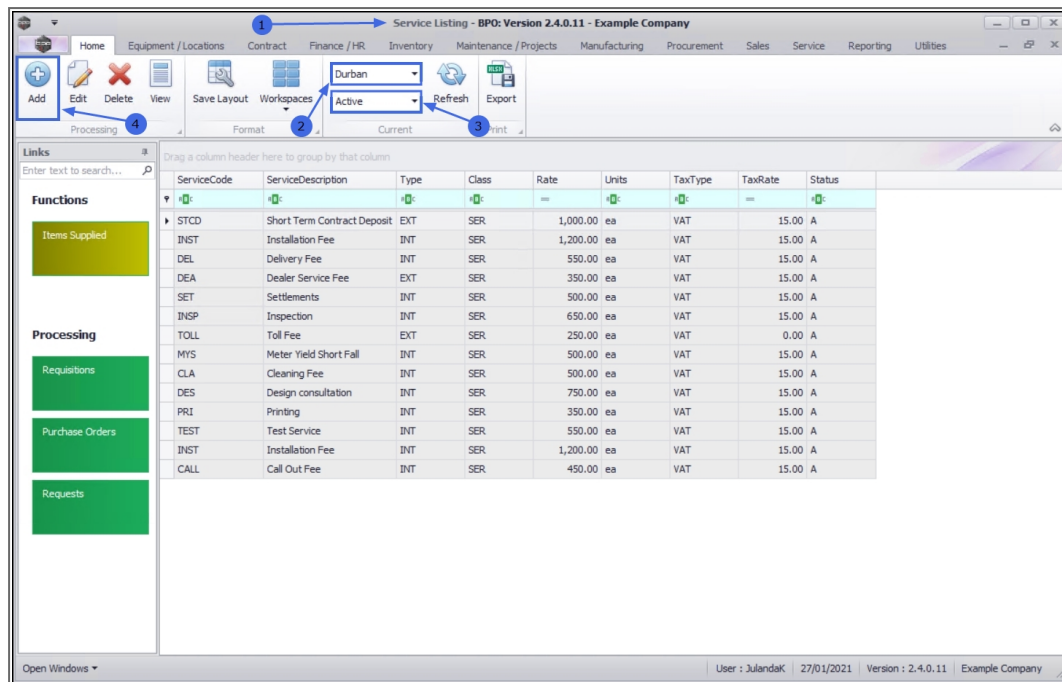
Ribbon Access: *Sales > Services*



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**.



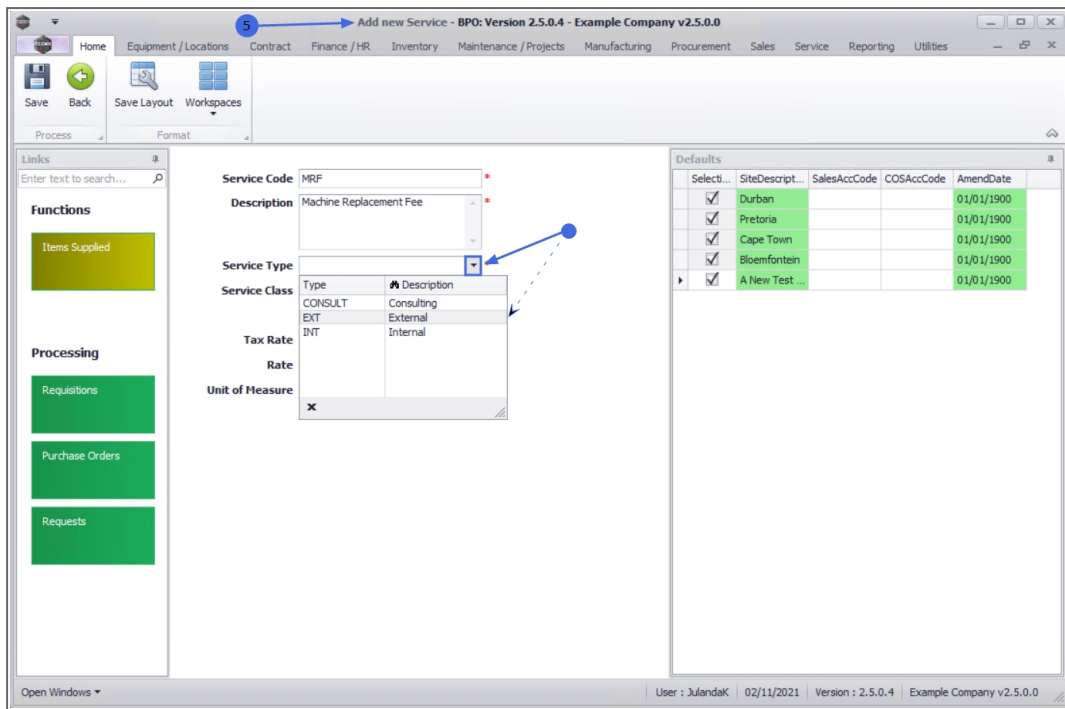
Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



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 → Add new Service - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

Service Code: MRF

Description: Machine Replacement Fee

Service Type: External

Service Class: CONSULT, EXT, INT

Tax Rate: DVT

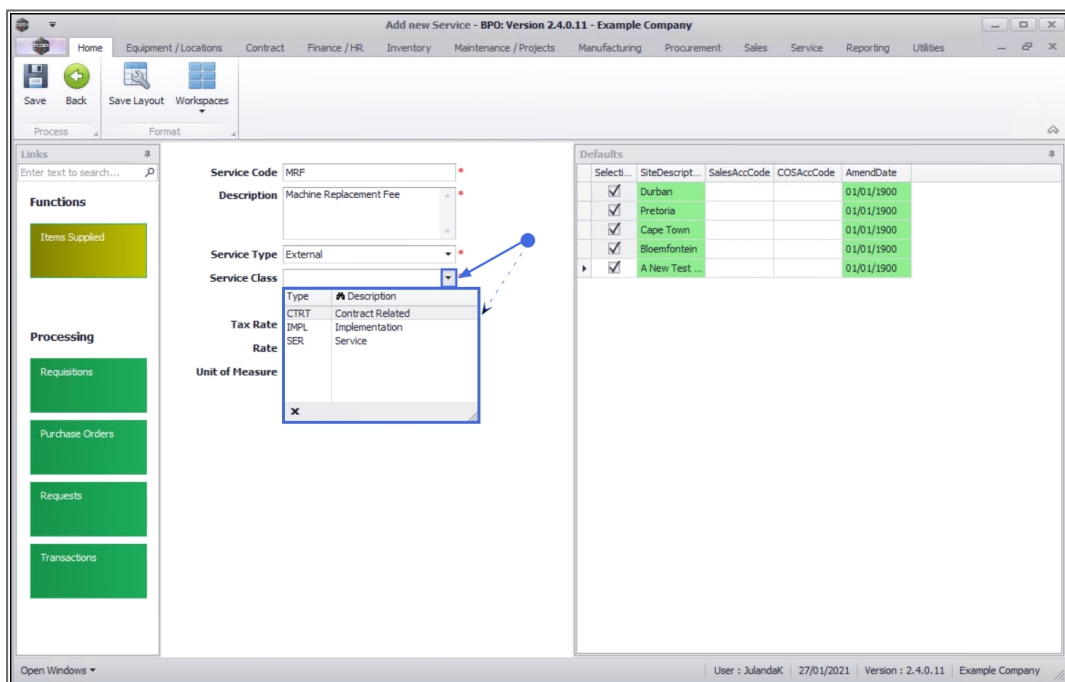
Rate: 1

Unit of Measure: x

Select...	SiteDescript...	SalesAccCode	COSAccCode	AmendDate
<input checked="" type="checkbox"/>	Durban			01/01/1900
<input checked="" type="checkbox"/>	Pretoria			01/01/1900
<input checked="" type="checkbox"/>	Cape Town			01/01/1900
<input checked="" type="checkbox"/>	Blomfontein			01/01/1900
<input checked="" type="checkbox"/>	A New Test ...			01/01/1900

User : JulandaK 02/11/2021 Version : 2.5.0.4 Example Company v2.5.0.0

- **Service Class:** Click on the down *arrow* to select the service class that applies to your service type.
 - The example has **Contract Related** selected.



Add new Service - BPO: Version 2.4.0.11 - Example Company

Service Code: MRF

Description: Machine Replacement Fee

Service Type: External

Service Class: CTRT, IMPL, SER

Tax Rate: DVT

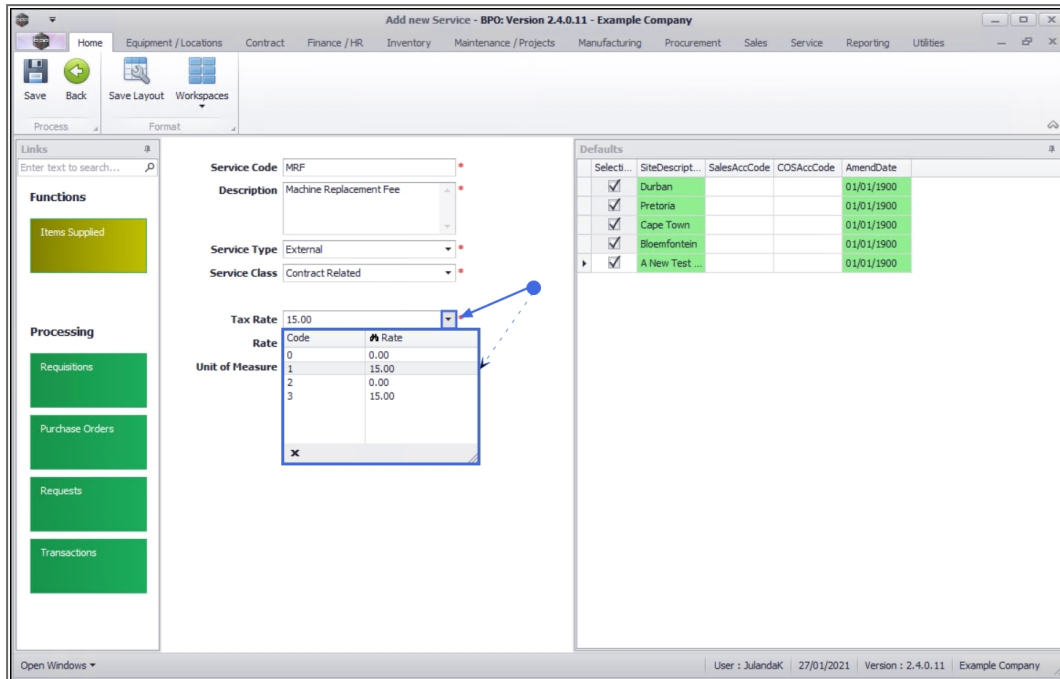
Rate: 1

Unit of Measure: x

Select...	SiteDescript...	SalesAccCode	COSAccCode	AmendDate
<input checked="" type="checkbox"/>	Durban			01/01/1900
<input checked="" type="checkbox"/>	Pretoria			01/01/1900
<input checked="" type="checkbox"/>	Cape Town			01/01/1900
<input checked="" type="checkbox"/>	Blomfontein			01/01/1900
<input checked="" type="checkbox"/>	A New Test ...			01/01/1900

User : JulandaK 27/01/2021 Version : 2.4.0.11 Example Company

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



Service Code: MRF

Description: Machine Replacement Fee

Service Type: External

Service Class: Contract Related

Tax Rate: 15.00

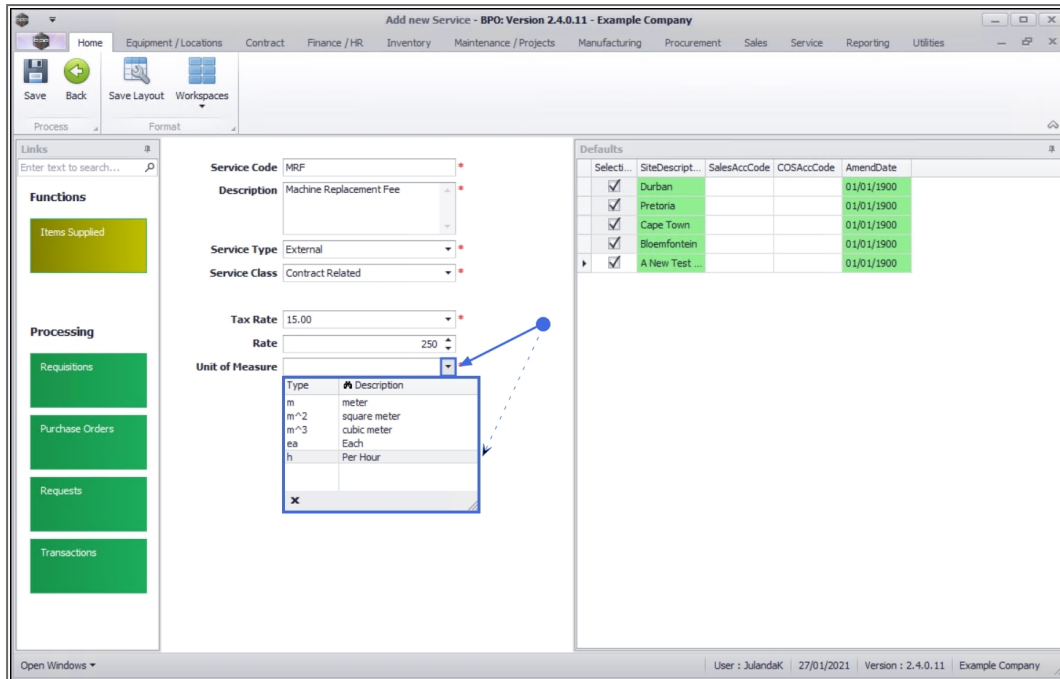
Code	Rate
0	0.00
1	15.00
2	0.00
3	15.00

Unit of Measure: Per Hour

Select...	SiteDescript...	SalesAccCode	COSAccCode	AmendDate
<input checked="" type="checkbox"/>	Durban			01/01/1900
<input checked="" type="checkbox"/>	Pretoria			01/01/1900
<input checked="" type="checkbox"/>	Cape Town			01/01/1900
<input checked="" type="checkbox"/>	Bloemfontein			01/01/1900
<input checked="" type="checkbox"/>	A New Test ...			01/01/1900

User : JulandaK | 27/01/2021 | Version : 2.4.0.11 | Example Company

- **Rate:** *Type* in or use the **directional arrows** to select the rate or price per unit of measure for the service, 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.



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.
7. 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**.

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

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

ServiceCode	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxRate	Status
STCD	Short Term Contract Deposit	EXT	SER	1,000.00	ea	VAT	15.00	A
INST	Installation Fee	INT	SER	1,200.00	ea	VAT	15.00	A
DEL	Delivery Fee	INT	SER	550.00	ea	VAT	15.00	A
DEA	Dealer Service Fee	EXT	SER	350.00	ea	VAT	15.00	A
SET	Settlements	INT	SER	500.00	ea	VAT	15.00	A
INSP	Inspection	INT	SER	650.00	ea	VAT	15.00	A
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
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	A
TEST	Test Service	INT	SER	550.00	ea	VAT	15.00	A
INST	Installation Fee	INT	SER	1,200.00	ea	VAT	15.00	A
CALL	Call Out Fee	INT	SER	450.00	ea	VAT	15.00	A
MRF	Machine Replacement Fee	EXT	CTRT	250.00	h	VAT	15.00	A

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