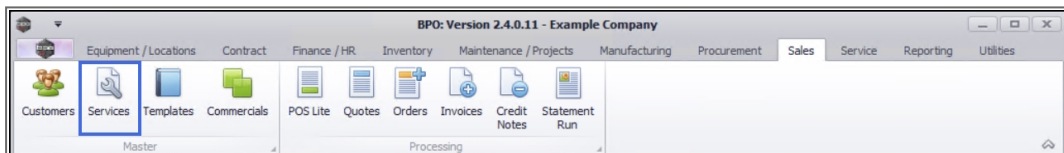# SALES

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.
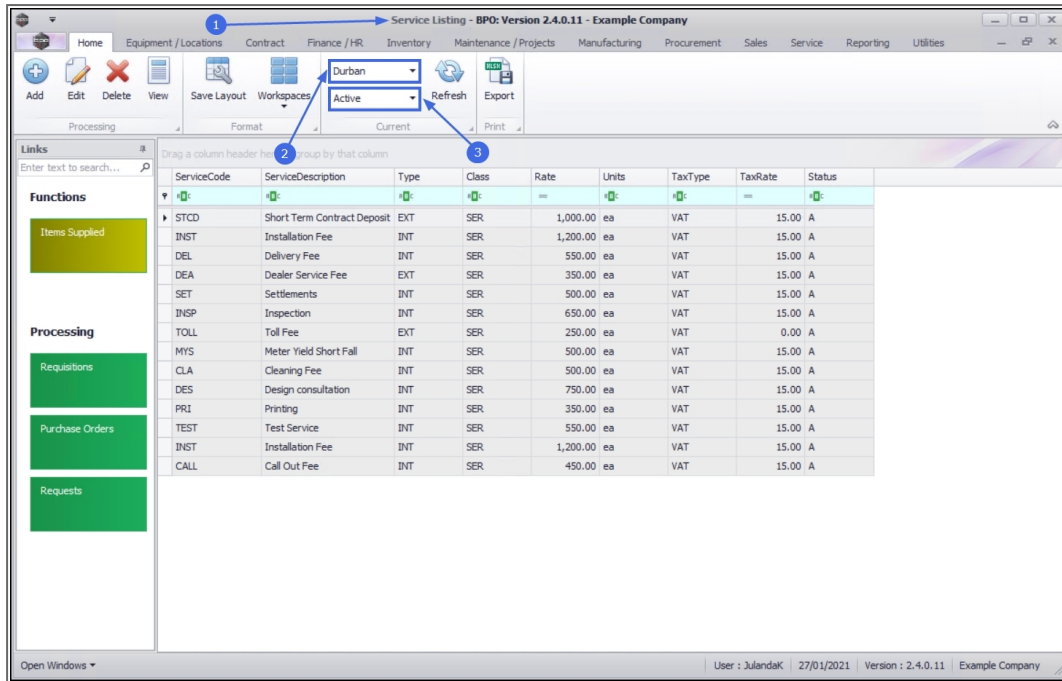
SERVICE LISTING SCREEN

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.
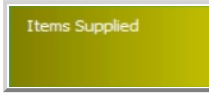
RIBBON TOOLBAR

- 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

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
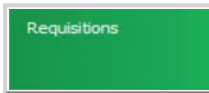
The Requisitions tile displays a list of purchase requisitions for a selected service. You can **Add**, **Edit** or **Delete** a purchase requisition for the service. Refer to Services - Purchase Requisitions
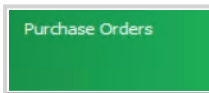
The Purchase Orders tile will direct you to the Service Listing screen where you can **View**, **Print**, or **Close** a Purchase Order, access the purchase order **Notes**, view the purchase order **Address** or **Delivery Instructions**. Refer to Services - Purchase Orders
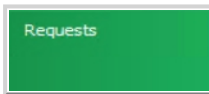
The Requests tile will display a list of all the Service Requests linked to the Service. Refer to Services - Requests

BPO.MNU.065