

# **SALES**

### **SERVICES - ITEMS SUPPLIED**

From the items supplied tile you can;

- Add /Link A Supplier to A Service Definition
- Edit a Supplier Information
- Delete/Remove a Supplier from a Service

The system facilitates multiple suppliers per service definition, but only one supplier is marked as the **primary** supplier and will be the default supplier when purchase requisitions are raised. This can be changed on the purchase requisition if the stock is sourced from a different supplier.

Each time a service is purchased from the primary supplier, the unit cost will be updated to the latest purchase price.

Note that the expected delivery date is calculated based on the purchase order date, plus the lead time.

Ribbon Access: Sales > Services



- 1. The *Service Listing* screen will display.
- 2. Select the *Site* where the service can be located.
  - The example has *Durban* selected.
- 3. Change the *Status* to *Active*.



| iks #               |   |             | fer here to group by that column |      | 3            |          |       |         |         |        |  |
|---------------------|---|-------------|----------------------------------|------|--------------|----------|-------|---------|---------|--------|--|
| er text to search P |   | ServiceCode | ServiceDescription               | Туре | Class        | Rate     | Units | TaxType | TaxRate | Status |  |
| unctions            | ٩ | REC         | REC                              | RBC  | R <b>B</b> C | =        | RBC   | R B C   | =       | 8 C    |  |
|                     | ۲ | STCD        | Short Term Contract Deposit      | INT  | SER          | 1,000.00 | ea    | VAT     | 15.00   | A      |  |
| Items Supplied      |   | INST        | Installation Fee                 | INT  | SER          | 1,200.00 | ea    | VAT     | 15.00   | Α      |  |
|                     |   | DEL         | Delivery Fee                     | INT  | SER.         | 550,00   | ea    | VAT     | 15.00   | A      |  |
|                     |   | DEA         | Dealer Service Fee               | EXT  | SER          | 350.00   | ea    | VAT     | 15.00   | Α      |  |
|                     |   | SET         | Settlements                      | INT  | SER.         | 500.00   | ea    | VAT     | 15.00   | Α      |  |
|                     |   | INSP        | Inspection                       | INT  | SER.         | 650.00   | ea    | VAT     | 15.00   | Α      |  |
| rocessing           |   | 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   | Α      |  |
|                     |   | DES         | Design consultation              | INT  | SER          | 750.00   | ea    | VAT     | 15.00   | A      |  |
|                     |   | PRI         | Printing                         | INT  | SER          | 350.00   | ea    | VAT     | 15.00   | A      |  |
| Purchase Orders     |   | TEST        | Test Service                     | INT  | SER          | 550.00   | ea    | VAT     | 15.00   | Α      |  |
|                     |   | INST        | Installation Fee                 | INT  | SER.         | 1,200.00 | ea    | VAT     | 15.00   | Α      |  |
|                     |   | CALL        | Call Out Fee                     | INT  | SER          | 450.00   | ea    | VAT     | 15.00   | A      |  |

- 4. Click on the *row* of the *service* you wish to *link a supplier* to.
- 5. Click on the *Items Supplied* tile.



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| Items Supplied        | SICD                     | Short Term Contract Deposit | INI                        | SER      | 1,000.00 | ea     | VAI     | 15.00   | A  |   |
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| Processing            | TOLL                     | Toll Fee                    | EXT                        | SER      | 250.00   | ea     | VAT     | 0.00    | A  |   |
| 5                     | 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   | A  |   |
| Purchase Orders       | TEST                     | Test Service                | INT                        | SER      | 550.00   | ea     | VAT     | 15.00   | A  |   |
|                       | <ul> <li>INST</li> </ul> | 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  |   |

- 6. The *Suppliers for Service [service code]* screen will be displayed.
- 7. A list of all the suppliers that are linked to the service and is currently providing a service is displayed.
- 8. Click on Add.

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



| \$  | Ŧ            | 6                            | Suj          | ppliers for Service | INST - BP | 0: Version 2.4.0.1 | 1 - Example Compa | any          |                    |                    |            |
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| +   | SPR001       | Sprint Distributors Local    | 500.00       | 500.00              | 0         |                    | No                | 1.00         |                    |                    |            |
|     | COM001       | Computers and Accessories    | 1,250.00     | 1,250.00            | 0         |                    | Yes               | 1.00         |                    |                    |            |
| 4   |              |                              |              |                     |           |                    |                   |              |                    |                    | Þ          |
| Op  | en Windows   | •                            |              |                     |           |                    | User : Jul        | andaK 28/01/ | 2021 Version : 2.4 | 1.0.11 Example Com | npany //.  |

The system will automatically place the linked supplier on a newly created requisition when a supplier has been linked to a **service definition**, along with the **unit cost** and **lead time** linked to that supplier.

 The *Maintenance of Service Supply Item [service item code]* screen will be displayed.

#### SUPPLIER IDENTIFICATION

- **Service:** This field will populate with the service code selected in the previous screen.
- **Description:** This field will populate with the service code description selected in the previous screen.
- Supplier: To link the supplier click on the *search* button.
  - i. The Select a supplier to configure the supply info screen will display.



- ii. Click on the *row* of the supplier you wish to link to the service.
- iii. Click on OK.

| 1  | inment / Locations  | Contract | Finance / HD | Inventory  | Maintenance / Projects   | Manufacturing  | Progreenent                           | Sales Service  | Reporting   | (b)  |       |
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| Service  | INST                |          | * م          |            | Unit C   | st   |                                       | 0 1 *  |   |  |       |
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| Supplier   |                     |          | P 4          |            | Lead Time (Day   | 5)   |                                       | • •  |   |  |       |
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| Supplier Code  |                     |          |              |            | Select a supp  | lier to configure t  | he supply info                        |  | _   |  | x     |
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| Supplier Code<br>Blanket PO No.  |                     |          |              |            | Home   | lier to configure t  | he supply info                        |  | _   |  | x     |
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| Supplier Code<br>Blanket PO No.<br>Primary Supplier<br>Currency<br>Exchange Rate<br>Warranty<br>Apply Warranty |                     |          | •            |            | Voltract Part<br>→ Select a supp<br>Home<br>→ Back<br>Process<br>SupplerCode<br>↓ @c<br>DOG01<br>DOC01<br>↓ GRE001<br>MAD001   | Save Layout<br>Save Layout<br>mat<br>SupplerName<br>C<br>Door to Door Deliverin<br>Durban Copy Shop<br>Green Office<br>Maddys Haberdashe                         | the supply info<br>that column<br>ies | ContactName<br>all:<br>John Smart<br>Magan Jones<br>Mary Watson<br>Maddy Jones   | SupplerType<br>GEN<br>GEN<br>GEN<br>GEN                       | Status<br>"C<br>A<br>A<br>A<br>A<br>A            | × • • |
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- Name: This field will auto populate with the Supplier Name after you have selected the Supplier Code.
- **Supplier Code:** Type in the code used by the Supplier for the service. This will filter through to the purchase order.
- Blanket PO No<sup>1</sup>: The purchase order number is similar to an 'account no' that the supplier gives the company. Type in the number if applicable, otherwise leave this field blank.

<sup>1</sup>This is the purchase order number relating to the contract if a SLA agreement has been signed with the supplier to procure the service exclusively from them, for a specified period.



Primary Supplier: Click on the check box if this is the primary supplier<sup>1</sup>.

Note that each part definition can have only <u>one</u> primary supplier.

- **Currency:** This field will auto populate with the currency already set up on this supplier.
- Exchange Rate: If the supplier currency (above) is not the currency used by the company, then this field will populate with the current exchange rate, for instance if the supplier currency field was dollars \$ and the company currency is rands R then this exchange rate field would populate with 10, as the current exchange rate is 10 rand for 1 dollar.

<sup>&</sup>lt;sup>1</sup>This will be the supplier that you regularly buy a particular part/item from. The primary supplier is linked to the part definition. Any purchase requisitions raised for this part definition will be created with the primary suppliers details linked. The purchase requisition can be edited to link an alternative supplier, if required.



| <b>∲</b> <del>,</del> |                      | Ma       | intenance of s | Service Supp | ly Item INST - BPO: Vers | ion 2.4.0.11 - Ex | cample Compa  | iny        |         |            | -          |       | х  |
|-----------------------|----------------------|----------|----------------|--------------|--------------------------|-------------------|---------------|------------|---------|------------|------------|-------|----|
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| PIOCESS A             |                      |          |                |              |                          |                   |               |            |         |            |            |       | ~~ |
| Service               | INST                 |          | • م            |              | Unit Cos                 | •                 |               | 0 * *      |         |            |            |       |    |
| Description           | Installation Fee     |          |                | ÷            | Base Unit Cos            |                   |               | 0.00       |         |            |            |       |    |
|                       |                      |          |                | · · ·        | Lead Time (Days          | )                 |               | 0 1        |         |            |            |       |    |
| Supplier              | r GRE001             |          | * م            |              | Contract No              |                   |               | - •        |         |            |            |       |    |
| Name                  | Green Office         |          |                | <u> </u>     | Page No                  | ,                 |               |            |         |            |            |       |    |
|                       |                      |          |                | Ψ.           | Contract Part No         | ,                 |               |            |         |            |            |       |    |
|                       |                      |          |                |              |                          |                   |               |            |         |            |            |       |    |
| Supplier Code         | 1234123              |          |                |              | Unit of Purchase         |                   |               |            |         |            |            |       |    |
| Blanket PO No.        |                      |          |                |              | Minimum Order Qt         | /                 |               | 0 🗘 *      |         |            |            |       |    |
| Primary Supplie       | er 🔲                 |          |                |              | Catalog No               | <b>,</b>          |               |            |         |            |            |       |    |
| Currency              | South African Rand   |          | •              |              |                          |                   |               |            |         |            |            |       |    |
| Exchange Rate         | 2                    | 1        | .0000          |              |                          |                   |               |            |         |            |            |       |    |
| Warrant               | ,                    |          | •              |              |                          |                   |               |            |         |            |            |       |    |
| Apply Warrants        | ·                    |          |                |              |                          |                   |               |            |         |            |            |       |    |
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| Open Windows 💌        |                      |          |                |              |                          | 1 le              | er : Julandak | 28/01/2021 | Version | : 2.4.0.11 | Example Co | mnany | ,  |

#### **DEFAULT WARRANTY DETAILS**

• Warranty<sup>1</sup>: If the Supplier offers a warranty for this service, click on the down *arrow* to select the warranty applicable, from the drop-down menu.

<sup>&</sup>lt;sup>1</sup>A warranty is a written assurance for an item given by the maker or supplier. This guarantee holds themselves responsible to repair or replace the item if it or its parts are defective.



|                  | P                           | ianitendfice of : | service Supply | Trem mor - BPU: Vers   | UII 2.4.0.11 - EX | ample compa | ity   |                   |         |   |
|------------------|-----------------------------|-------------------|----------------|------------------------|-------------------|-------------|-------|-------------------|---------|---|
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| rocess 🦼         |                             |                   |                |                        |                   |             |       |                   |         | _ |
|                  | 11.100                      | 0.1               |                |                        |                   |             |       |                   |         |   |
| Service          | INSI                        | • 4               |                | Unit Cost              |                   |             | 0 🗘 * |                   |         |   |
| Description      | Installation Fee            |                   | ÷              | Base Unit Cost         |                   |             | 0.00  |                   |         |   |
|                  |                             |                   | <b>T</b>       | Lead Time (Days)       |                   |             | 0 ‡   |                   |         |   |
| Supplier         | GRE001                      | * م               |                | Contract No            |                   |             |       |                   |         |   |
| Name             | Green Office                |                   |                | Page No                |                   |             |       |                   |         |   |
|                  |                             |                   |                | Contrast Double        |                   |             |       |                   |         |   |
|                  |                             |                   |                | Contract Part No       |                   |             |       |                   |         |   |
| Supplier Code    | 1234123                     |                   |                |                        |                   |             |       |                   |         |   |
| Blanket PO No.   |                             |                   |                | Unit of Purchase       |                   |             | *     |                   |         |   |
| Duincer o no.    |                             |                   |                | Minimum Order Qty      |                   |             | 0 🗘 * |                   |         |   |
| Frinary Supplier |                             |                   |                | Catalog No             | (                 |             |       |                   |         |   |
| Currency         | South African Rand          | •                 | _              |                        |                   |             |       |                   |         |   |
| Exchange Rate    |                             | 1.0000            | <b>_</b>       |                        |                   |             |       |                   |         |   |
|                  |                             |                   |                |                        |                   |             |       |                   |         |   |
| Warranty         | TD # Name                   | •                 | Ŷ              |                        |                   |             |       |                   |         |   |
| Apply Warranty   | 1 24 Month Supplier Warrant | v                 |                | - î                    |                   |             |       |                   |         |   |
|                  | 2 12 Month Supplier Warrant | y<br>y            |                |                        |                   |             |       |                   |         |   |
|                  | 3 1 Year Supplier Warranty  |                   |                |                        |                   |             |       |                   |         |   |
|                  | 4 3 Months Service Warranty |                   |                | × .                    |                   |             |       |                   |         |   |
|                  | 5 warranty code test        |                   |                |                        |                   |             |       |                   |         |   |
|                  | 7 Tesung<br>8 TEST          |                   |                |                        |                   |             |       |                   |         |   |
|                  | ×                           |                   |                |                        |                   |             |       |                   |         |   |
|                  | ^                           |                   |                | 11.                    |                   |             |       |                   |         |   |
|                  |                             |                   |                |                        |                   |             |       |                   |         |   |
|                  |                             |                   |                |                        |                   |             |       |                   |         |   |

• Apply Warranty: Mark this check box if the warranty selected in the previous field should be linked to the service.



| Ŧ                |                    | Mai      | ntenance of s | Service Supp | v Item INST - BPO: Vers | ion 2.4.0.11 - Ex | ample Compa   | INV        |                  |                    |
|------------------|--------------------|----------|---------------|--------------|-------------------------|-------------------|---------------|------------|------------------|--------------------|
| Home Equ         | ipment / Locations | Contract | Finance / HR. | Inventory    | Maintenance / Projects  | Manufacturing     | Procurement   | Sales      | Service Report   | ing 🕑 🗕 🗗          |
| 4 🔿              |                    |          |               |              |                         |                   |               |            |                  |                    |
| Back             |                    |          |               |              |                         |                   |               |            |                  |                    |
| are buck         |                    |          |               |              |                         |                   |               |            |                  |                    |
| Process 🔺        |                    |          |               |              |                         |                   |               |            |                  |                    |
| Service          | INST               |          | * م           |              |                         |                   |               |            |                  |                    |
| Description      | Installation Fee   |          |               |              | Unit Cost               |                   |               | 0 📮 •      |                  |                    |
| Description      |                    |          |               |              | Base Unit Cost          |                   |               | 0.00       |                  |                    |
| Cumpler          | CDE001             |          | 0.*           |              | Lead Time (Days)        |                   |               | 0 ‡        |                  |                    |
| Supplier         | GREUUI             |          | - 0           |              | Contract No             |                   |               |            |                  |                    |
| Name             | Green Office       |          |               | <u></u>      | Page No                 |                   |               |            |                  |                    |
|                  |                    |          |               | Ψ.           | Contract Part No        |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
| Supplier Code    | 1234123            |          |               |              | Unit of Purchase        |                   |               | *          |                  |                    |
| Blanket PO No.   |                    |          |               |              | Minimum Order Qty       |                   |               | 0 🛊 *      |                  |                    |
| Primary Supplier |                    |          |               |              | Catalog No              |                   |               |            |                  |                    |
| Currency         | South African Rand |          | -             |              |                         |                   |               |            |                  |                    |
| Exchange Rate    |                    | 1.       | 0000          |              |                         |                   |               |            |                  |                    |
| Warranty         |                    |          | •             |              |                         |                   |               |            |                  |                    |
| Analy Warranty   |                    |          |               |              |                         |                   |               |            |                  |                    |
| Apply warrailty  |                    |          |               |              |                         |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
|                  |                    |          |               |              |                         |                   |               |            |                  |                    |
| en Windows 🔻     |                    |          |               |              |                         | Us                | er : JulandaK | 28/01/2021 | Version : 2.4.0. | 11 Example Company |

#### ORDERING

- Unit Cost: Type in the cost per unit.
- Base Unit Cost: This field is greyed out as it is not edible by the user. The system will calculate this figure according to the entries in the Unit Cost and Exchange Rate fields. If the supplier Currency is the same as the company and the Exchange Rate field is <u>blank</u>, then the Base Unit Cost figure will be the same as the Unit Cost figure.
- Lead Time<sup>1</sup> (Days): Type in the lead time (in days). The expected delivery date for the service is calculated based on the *Purchase Order date*, plus the *supplier lead time*.

<sup>1</sup>The lead time is the amount of time between when an order is placed with a supplier and the time that order is delivered and received by the company.



- **Contract No:** If you have a contract with the Supplier, type in the contract number or leave this field blank if not applicable.
- **Page No:** If you have a *contract* with the Supplier, type in the contract page number that relates to this part or leave this field blank if not applicable.
- **Contract Part No:** If you have a *contract* with the Supplier, type in the part number agreed to on this contract or leave this field blank if not applicable.
- Unit of Purchase: Type in the unit that ties up with this service, if applicable. Usually the default of 'ea' (each) is used.
- **Minimum Order Qty:** This is the minimum the supplier will supply per order. For example, a supplier may have a minimum limit of 10 items per order.
- **Catalog No:** Type in the catalogue number as per the supplier's catalogue, if applicable.
- 10. When you have finished adding the details for the Supplier, click on *Save* .



| Ŧ                |                    | Mair     | ntenance of S | ervice Suppl | y Item INST - BPO: Vers | ion 2.4.0.11 - Ex | ample Compa   | пу         |                    |              |     |
|------------------|--------------------|----------|---------------|--------------|-------------------------|-------------------|---------------|------------|--------------------|--------------|-----|
| Home Equ         | ipment / Locations | Contract | Finance / HR  | Inventory    | Maintenance / Projects  | Manufacturing     | Procurement   | Sales      | Service Reporting  | • - d        | 8   |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
| ve Back          |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  | 10                 |          |               |              |                         |                   |               |            |                    |              |     |
| rocess 🔺         | -<br>-             |          |               |              |                         |                   |               |            |                    |              | _   |
| Service          | INST               |          | * م           |              | Unit Cos                |                   |               | 450 * *    | 7                  |              |     |
| Description      | Installation Fee   |          |               | *            | Base Unit Cos           |                   |               | 450.00     |                    |              |     |
|                  |                    |          |               | -            | Base Unit Cos           |                   |               | 450.00     |                    |              |     |
| Supplier         | GRE001             |          | * م           |              | Lead Time (Days         |                   |               | 1 -        |                    |              |     |
| Name             | Green Office       |          |               | *            | Contract No             | ,<br>             |               |            |                    |              |     |
|                  |                    |          |               | ~            | Page No                 |                   |               |            |                    |              |     |
|                  |                    |          |               |              | Contract Part No        |                   |               |            |                    |              |     |
| Supplier Code    | 1234123            |          |               |              | Unit of Duraha and      |                   |               |            |                    |              |     |
| Blanket PO No.   |                    |          |               |              | Minimum Order Ob        | e ea              |               | 1 * *      |                    |              |     |
| Primary Supplier |                    |          |               |              | Catalaa N               |                   |               | 4 + 1      |                    |              |     |
| Currency         | South African Rand |          | •             |              | Catalog No              | ,                 |               |            |                    |              |     |
| Exchange Rate    |                    | 1.0      | 0000          |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
| Warranty         |                    |          | •             |              |                         |                   |               |            |                    |              |     |
| Apply Warranty   |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         |                   |               |            |                    |              |     |
|                  |                    |          |               |              |                         | Us                | er : JulandaK | 28/01/2021 | Version : 2.4.0.11 | Example Comp | anv |

- 11. You will return to the *Suppliers for Service* screen.
- 12. When you receive the *Item Supply Processing* message to confirm that;
  - Item supply configuration for service: [service code] and supplier [supplier code] complete.
- 13. Click on *OK*.



| 6 | Hom          | e Equipment / Locations Co | ntract Finance | A Inventory                  | Mainten    | ance / Projects M    | lanufacturing Pro                | curement Sale | s Service Re   | porting 🕑 🛛 🗕 | ₽ ×    |
|---|--------------|----------------------------|----------------|------------------------------|------------|----------------------|----------------------------------|---------------|----------------|---------------|--------|
| 1 | Add Edit     | Delete Back Save Layout    | Workspaces     | Refresh                      |            |                      |                                  |               |                |               |        |
|   | Proces       | ssing 🖌 For                | mat "          | Curr 4                       |            |                      |                                  |               |                |               |        |
|   |              |                            |                |                              |            |                      |                                  |               |                |               |        |
|   | SupplierCode | SupplierName               | UnitCost       | ForeignCcyUnitCost           | LeadTime   | SupplierItemCode     | PrimarySupplier                  | MinimumOrd    | ContractPartNo | WarrantyCode  | Contra |
| ٩ | R C          | e 🛛 c                      | -              | =                            | -          | 8 C                  | R <b>O</b> C                     | =             | n <b>B</b> C   | × E c         | REC    |
|   | SPR001       | Sprint Distributors Local  | 500.00         | 500.00                       | 0          |                      | No                               | 1.00          |                |               |        |
|   | COM001       | Computers and Accessories  | 1,250.00       | 1,250.00                     | 0          |                      | Yes                              | 1.00          |                |               |        |
| ۲ | GRE001       | Green Office               | 450.00         | 450.00                       | 1          | 1234123              | No                               | 1.00          |                |               |        |
|   |              |                            |                | Item supply con              | figuration | for service : INST a | and supplier GRE001              | ^             |                |               |        |
|   |              |                            |                | Item supply con<br>complete. | figuration | for service : INST a | and supplier GRE001              |               |                |               |        |
|   |              |                            |                | Item supply con<br>complete. | figuration | for service : INST a | ond supplier GRE001              |               |                |               |        |
|   |              |                            |                | Item supply con<br>complete. | figuration | for service : INST a | Note: The second supplier GRE001 |               |                |               |        |
|   |              |                            |                | Item supply con<br>complete. | figuration | for service : INST a | and supplier GRE001              |               |                |               |        |

- 14. The Supplier details for the service you have linked, will be listed on the *Suppliers for Service* screen.
- 15. Click on *Back* to return to the Service listing screen.





### EDIT SERVICE ITEM FOR SUPPLIER

You can make changes to the supplier information e.g. update the Unit Cost or change a Supplier for this service.

- 1. From the Service Listing screen,
- 2. Select the *Site* where the service can be located.
  - The example has *Durban* selected.
- 3. Select the *Status* for the service.
  - The example has *Active* selected.
- 4. Click on the *row* of the Service you need to change.
- 5. Click on the *Items Supplied* tile.



| ; ∓<br>100            |        | 1-                 | Servic                       | e Listing - BP | 0: Version 2.4 | .0.11 - Examp | le Company  |                 |            |                    | -       |
|-----------------------|--------|--------------------|------------------------------|----------------|----------------|---------------|-------------|-----------------|------------|--------------------|---------|
|                       | ient / | Locations Cont     | Durban                       | • All          | Project        | s Manufactu   | ining Procu | rement Sales    | Service    | Reporting Utiliti  | BS      |
| Add Edit Delete V     | /iew   | Save Layout        | Workspaces Active            | Refres rent    | h Export       |               |             |                 |            |                    |         |
| nks #                 | Dra    | ag a column header | here to group by that column |                | 3              |               |             |                 |            |                    |         |
| tter text to search , |        | ServiceCode        | ServiceDescription           | Туре           | Class          | Rate          | Units       | TaxType         | TaxRate    | Status             |         |
| Functions             | ۴      | 8 B C              | RBC                          | RBC            | RBC            | -             | RBC         | RBC             | -          | s 🛛 c              |         |
| ,                     |        | STCD               | Short Term Contract Deposit  | INT            | SER            | 1,000.00      | ea          | VAT             | 15.00      | A                  |         |
| Items Supplied        |        | 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                  |         |
| 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      | A                  |         |
| Purchase Orders       |        | 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                  |         |
| Requests              |        | 4                  |                              |                |                |               |             |                 |            |                    |         |
| en Windows 👻          |        |                    |                              |                |                |               | L           | Iser : JulandaK | 28/01/2021 | Version : 2.4.0.11 | Example |

- 6. From the *Suppliers for Service [service code]* screen,
- 7. Click on the *row* of the service the supplier is linked to.
- 8. Click on *Edit*.



- 9. When you receive the *Supply Item* message to confirm;
  - Are you sure you want to edit the item [item code] supplied by [supplier name]?
- 10. Click on Yes.



| <b>G</b>          | × 😋 🔍                             |            | 1                                   |                    |                         |                      |            |                |              |         |
|-------------------|-----------------------------------|------------|-------------------------------------|--------------------|-------------------------|----------------------|------------|----------------|--------------|---------|
| Add Edit          | Delete Back Save Layout           | Workspaces | Refresh                             |                    |                         |                      |            |                |              |         |
| Proces            | ssirig Forr                       | nat "      | Curr 🧃                              |                    |                         |                      |            |                |              | 2       |
| Drug a column hea | ader here to group by that column |            |                                     |                    |                         |                      |            |                |              | 1       |
| SupplierCode      | SupplierName                      | UnitCost   | ForeignCcyUnitCost                  | LeadTime           | SupplierItemCode        | PrimarySupplier      | MinimumOrd | ContractPartNo | WarrantyCode | Contrac |
|                   |                                   | -          | -                                   | -                  | all c                   | 100                  | -          | allic .        | 100          | HE C    |
| PPT001            | Sprint Distributors Local         | 150.00     | 150.00                              | 0                  |                         | No                   | 1.00       |                |              |         |
| MET001            | Metro Peach                       | 150.00     | 150.00                              | 0                  |                         | Yes                  | 1.00       |                |              |         |
|                   |                                   | Supply     | y Item                              | ou want to         | 9<br>edit the item CALL | supplied by Sprint   | ×          |                |              |         |
|                   |                                   | Supply     | Are you sure yo<br>Distributors Loo | ou want to<br>cal? | edit the item CALL      | . supplied by Sprint | ×          |                |              |         |
|                   |                                   | Supply     | Are you sure yo<br>Distributors Loc | ou want to<br>cal? | edit the item CALL      | . supplied by Sprint | ×          |                |              |         |

- 11. The *Maintenance of Service Supply Item for Supplier [supplier code]* screen will display.
- 12. For the purpose of this manual, the *Warranty Code* for the Supplier has been updated.

Refer to "Supplier Identification" on page 4for details on the fields that needs to edit.

13. After making the required changes, click on *Save*.



| cess 🔺         | 13                        |        |                    |    |         |  |
|----------------|---------------------------|--------|--------------------|----|---------|--|
| Service        | CALL                      | * م    | linit Cod          |    | 150 * * |  |
| Description    | Call Out Fee              |        | A Base Unit Cost   |    | 150.00  |  |
|                |                           |        | + Lead Time (Days) |    | 0 *     |  |
| Supplier       | SPR001                    | * ٩    | Contract No        |    | • •     |  |
| Name           | Sprint Distributors Local |        | A Page No          |    |         |  |
|                |                           |        | - Contract Part No |    |         |  |
|                |                           |        |                    |    |         |  |
| Supplier Code  |                           |        | Unit of Purchase   | ea |         |  |
| Blanket PO No. |                           |        | Minimum Order Qty  | ,  | 1 🗘 *   |  |
| rimary Supplie | r 🔲                       |        | Catalog No         |    |         |  |
| Currency       | South African Rand        | •      |                    |    |         |  |
| Exchange Rate  |                           | 1.0000 |                    |    |         |  |
| Warranty       | 3 Months Service Warranty | •      |                    |    |         |  |
| Apply Warranty |                           |        | 12                 |    |         |  |
|                |                           |        |                    |    |         |  |
|                |                           |        |                    |    |         |  |
|                |                           |        |                    |    |         |  |
|                |                           |        |                    |    |         |  |

14. You will return to the *Suppliers for Service* screen where you can view the updated information.



| - | <b>₩</b>  |         |              | (         | 14       |              |              | liers for s | Service - C | ALL - BPO: Versio  | n <b>2.4.0.11</b> - Exan | ple Company  |                 |                    |             |
|---|-----------|---------|--------------|-----------|----------|--------------|--------------|-------------|-------------|--------------------|--------------------------|--------------|-----------------|--------------------|-------------|
|   | -         | Home    | Equip        | ment / Lo | ocations | Contract I   | Finance / HR | Invent      | ory Mair    | tenance / Projects | Manufacturing            | Procurement  | Sales Service   | Reporting Utilitie | s –         |
| ( | Add E     | Edit    | X            | G<br>Back | Save Lay | vout Workspa | ces Refre    | sh          |             |                    |                          |              |                 |                    |             |
|   |           |         |              |           |          | -            | -            |             |             |                    |                          |              |                 |                    |             |
|   | ,         | Process | ang          | 4         |          | Format       | A Curr.      | •           |             |                    |                          |              |                 |                    |             |
| D |           |         |              |           |          |              |              |             |             |                    |                          |              |                 |                    |             |
|   | Supplier  | Code !  | SupplierNa   | ame       |          | UnitCost     | ForeignCo    | yUnitCost   | LeadTime    | SupplierItemCode   | PrimarySupplier          | MinimumOrd   | ContractPartNo  | WarrantyCode       | ContractPag |
| ۴ | RBC       |         | 8 <b>8</b> C |           |          | -            | -            |             | =           | R C                | s 🛛 c                    | =            | REC             | A C                | RBC         |
| • | SPR001    | 1       | Sprint Dis   | tributors | Local    | 150.0        | 0            | 150.00      | 0           |                    | No                       | 1.00         |                 | 3MSW               |             |
|   | PRI001    | 1       | Printer W    | orld      |          | 150.0        | 0            | 150.00      | 0           |                    | No                       | 1.00         |                 |                    |             |
|   | MET001    | 1       | Metro Pea    | ach       |          | 150.0        | 0            | 150.00      | 0           |                    | Yes                      | 1.00         |                 |                    |             |
|   |           |         |              |           |          |              |              |             |             |                    |                          |              |                 |                    |             |
|   |           |         |              |           |          |              |              |             |             |                    |                          |              |                 |                    |             |
| 4 |           |         |              |           |          |              |              |             |             |                    |                          |              |                 | 1                  |             |
| 0 | pen Windo | ows •   |              |           |          |              |              |             |             |                    |                          | User : Julan | ndaK 28/01/2021 | Version : 2.4.0.11 | Example Com |

## DELETE/REMOVE A SUPPLIER FOR A SERVICE

- 1. From the *Service Listing* screen,
- 2. Select the *Site* where the service can be located.
  - The example has *Durban* selected.
- 3. Select the *Status* for the service.
  - The example has *Active* selected.
- 4. Click on the *row* of the Service you need to remove the supplier for.
- 5. Click on the *Items Supplied* tab.



| ; ∓<br>∰ !!           |        | 1-                 | Servic                       | e Listing - BP | 0: Version 2.4 | .0.11 - Examp | le Company  | Color           | Canalas    |                    | -       |
|-----------------------|--------|--------------------|------------------------------|----------------|----------------|---------------|-------------|-----------------|------------|--------------------|---------|
|                       | ient / | Locations Cont     | Durban                       | • All          | Project        | s Manufactu   | ining Procu | rement Sales    | Service    | Reporting Utiliti  | BS      |
| Add Edit Delete V     | /iew   | Save Layout        | Workspaces Active            | Refres rent    | h Export       |               |             |                 |            |                    |         |
| nks #                 | Dra    | ag a column header | here to group by that column |                | 3              |               |             |                 |            |                    |         |
| tter text to search , |        | ServiceCode        | ServiceDescription           | Туре           | Class          | Rate          | Units       | TaxType         | TaxRate    | Status             |         |
| Functions             | ۴      | 8 B C              | RBC                          | RBC            | RBC            | -             | RBC         | 8 C             | -          | s 🛛 c              |         |
| ,                     |        | STCD               | Short Term Contract Deposit  | INT            | SER            | 1,000.00      | ea          | VAT             | 15.00      | A                  |         |
| Items Supplied        |        | 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                  |         |
| 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      | A                  |         |
| Purchase Orders       |        | 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                  |         |
| Requests              |        | 4                  |                              |                |                |               |             |                 |            |                    |         |
| en Windows 👻          |        |                    |                              |                |                |               | L           | Jser : JulandaK | 28/01/2021 | Version : 2.4.0.11 | Example |

- 6. The *Suppliers for Service [service code]* screen will display.
- 7. Click on the *row* of the Supplier you wish to remove / delete.
- 8. Click on *Delete*.

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

- 9. When you receive the *Delete Supply Item* message to confirm;
  - Are you sure you want to remove this supplied item from this supplier?
- 10. Click on **Yes** in you are certain about your selection.



| <b>\$</b> = | 6—                            |                | Suppliers for S    | iervice - C | ALL - BPO: Version  | 2.4.0.11 - Exam     | ple Company            |                |                    |             |
|-------------|-------------------------------|----------------|--------------------|-------------|---------------------|---------------------|------------------------|----------------|--------------------|-------------|
|             | lome Equipment / Locations    | Contract Fin   | ance / HR Invent   | ory Mair    | ntenance / Projects | Manufacturing       | Procurement            | Sales Service  | Reporting Utilitie |             |
| Add Ed      | t Delete Back Save Lay        | yout Workspace | s Refresh          |             |                     |                     |                        |                |                    |             |
|             | header here to group 8 at col |                |                    |             |                     |                     |                        |                |                    |             |
| SupplierCo  | de SupplierName               | UnitCost       | ForeignCcyUnitCost | LeadTime    | SupplierItemCode    | PrimarySupplier     | MinimumOrd             | ContractPartNo | WarrantyCode       | ContractPag |
| 9 s0c       | s 🖸 c                         | -              | -                  | -           | 8 C                 | A D C               | -                      | RBC            | * <b>0</b> 0       | 88c         |
| SPR001      | Sprint Distributors Local     | 150.00         | 150.00             | 0           |                     | No                  | 1.00                   |                | 3MSW               |             |
| PRI001      | Printer World                 | 150.00         | 150.00             | 0           |                     | No                  | 1.00                   |                |                    |             |
| MET001      | Metro Peach                   | 150.00         | 150.00             | 0           |                     | Yes                 | 1.00                   |                |                    |             |
|             |                               |                | ? Are you sure y   | ou want to  | Fremove this suppl  | ied item for this s | upplier?<br><u>N</u> o |                |                    |             |
| 4           |                               |                |                    |             |                     |                     |                        |                |                    |             |
| Open Window | s 🕶                           |                |                    |             |                     |                     | User : Julan           | daK 28/01/2021 | Version : 2.4.0.11 | Example Cor |

11. The Supplier has been removed from the *Suppliers for Service* screen.

| \$   | Ŧ          |            |              |             |               | Suppliers fo | or Serv | rice - CALI | - BPO: Version 2 | .4.0.11 - Examp | le Company      |               |                     |             |
|------|------------|------------|--------------|-------------|---------------|--------------|---------|-------------|------------------|-----------------|-----------------|---------------|---------------------|-------------|
| 4    | н          | ome Eq     | uipment / L  | ocations Co | ntract Financ | e / HR Inve  | entory  | Mainten     | ance / Projects  | Manufacturing   | Procurement Sal | es Service    | Reporting Utilities | s —         |
| Ac   | d Edit     | Delete     | C)<br>Back   | Save Layout | Workspaces    | Refresh      |         |             |                  |                 |                 |               |                     |             |
| -    | Dro        | cancing    |              | Eor         | unt           | 0.00         |         |             |                  |                 |                 |               |                     |             |
|      | PTO        | cessing    |              | i rom       | liat a        | curr 🧃       |         |             |                  |                 |                 |               |                     | 11          |
| Draj | a column   | header her | e to group   |             |               |              |         |             |                  |                 |                 |               |                     | 1           |
| S    | upplierCod | e Supplie  | rName        |             | UnitCost      | ForeignCcyUn | hitCost | LeadTime    | SupplierItemCode | PrimarySupplier | MinimumOrd      | ContractPartN | 5 WarrantyCode      | Contract    |
| 9    | BC         | R C        |              |             | =             | =            |         | -           | R C              | RBC             | =               | R C           | 8 <b>C</b>          |             |
| • 5  | PR001      | Sprint     | Distributors | Local       | 150.00        | 1            | 150.00  | 0           |                  | No              | 1.00            |               | 3MSW                | 1           |
|      | R1001      | Printer    | World        |             | 150.00        | 1            | 150.00  | 0           |                  | No              | 1.00            |               |                     |             |
|      |            |            |              |             |               |              |         |             |                  |                 |                 |               |                     |             |
|      |            |            |              |             |               |              |         |             |                  |                 |                 |               |                     |             |
| 4 0  |            |            |              |             |               |              |         |             |                  |                 |                 |               |                     |             |
| Ope  | n Windows  | -          |              |             |               |              |         |             |                  |                 | User : JulandaK | 28/01/2021    | Version : 2.4.0.11  | Example Com |



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