

SALES

SERVICES - REQUESTS

A service request is raised for a Purchase Order or Purchase Requisition, where a Third Party Sub Contracting Service is required.

The Service Requests tile will list the Service Requests for a Service. **No modifications and/or additions can be made.**

To create a Service Request for a Purchase Order, click on the link to redirect to <u>Introduction to Service Requests</u>.

Ribbon Access: Sales > Services



- 1. The *Service Listing* screen will be displayed.
- 2. Select the *Site* you wish to work in.
 - The example has *Durban* selected.
- 3. Select the *Status* of the Service Request.
 - The example has *Active* selected.
- 4. Click on the *row* of the *service* you wish to create a Request for.
- 5. Click on the *Requests* tile.



| | O ServiceCode | ServiceDescription | Type | Class | Rate | Units | TaxType | TaxRate | Status | | 1 |
|----------------------------|---------------|-----------------------------|------|--------------|----------|--------------|---------|---------|--------|--|---|
| unctions | • #D: | 100 | 80c | * D ¢ | = | * 0 ¢ | REC. | = | ROC | | |
| | STCD | Short Term Contract Deposit | INT | 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 | | |
| Processing Requisitions | 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 | | |
| 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 | | |

6. The *Service Requests for Service Code [service code]* will display.

Note that this is a view only screen and you will not be able to make any changes to the information on this screen.

- 7. A list of all the Service Requests linked to the Service is listed.
- 8. You can export the list to a Microsoft Excel Spread Sheet, by clicking on Export.
- 9. Click on *Back* to return to the *Service Listing* screen.



| F Contract Service Requests for Service Code TOLL - BPO: Version 2.4.0.11 - Example Company | | | | | | | | | | |
|---|-----------------------|-------------------------------|---------------------|----------------------|--------------|------------------------|------------|--|--|--|
| Home Equipment / Locations | Contract Finance / HR | Inventory Maintenance | e / Projects Manufa | acturing Procurement | Sales Serv | ice Reporting Utilitie | es — 🗗 🗙 | | | |
| Edit Delete Maintenance | spaces Process | rban Refresh | Export | 8 | | | \$ | | | |
| | | | | | | | | | | |
| WOCode WODescription | SourceRef | SourceDesc | CustomerCode | CustomerName | DeptCode | DeptName | SourceType | | | |
| Y 100 100 | R E C | 1 0 : | * 0 ¢ | 1 0 1 | H O C | 8BC | 8 🖬 c | | | |
| WO0001152 installation of dients asset | CN0000422 | installation of clients asset | HOP001 | Hope Works (Pty) Ltd | | -7 | | | | |
| WO0002263 1234 - Test ctrt request cr. | PRJ0000394 | 1234 - Test ctrt request cr | HOP001 | Hope Works (Pty) Ltd | | • | | | | |
| | | | | | | | | | | |
| 4 C | | | | | | | | | | |

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