

We are currently updating our site; thank you for your patience.

SALES

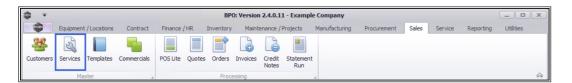
INTRODUCTION TO SERVICES

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 there-fore has **Active** selected.



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	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	Α				
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	DES	Design consultation	INT	SER	750.00	ea	VAT	15.00	A				
	PRI	Printing	INT	SER	350.00	ea	VAT	15.00	A				
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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

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CALL	Call Out Fee	INT	SER	450.00	ea	VAT	15.00	A	



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

Purchase Orders

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

Requests

The Requests tile will display a list of all the Service Requests linked to the Service. Refer to Services - Requests

BPO.MNU.065

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