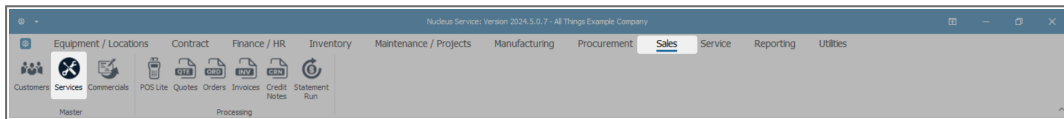We are currently updating our site; thank you for your patience.

# SALES

## SERVICES – ADD A SERVICE

**Ribbon** Select **Sales > Services**



- The **Service** listing screen will be displayed.

- The **Site** filter will be set according to your company configuration. If required, select the **Site** you wish to work in.

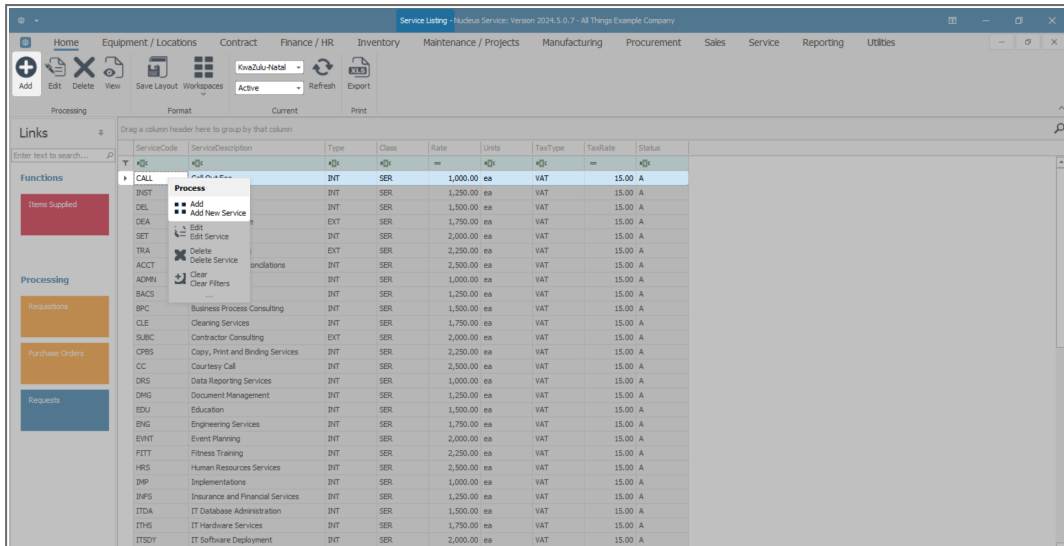> **Note:** Refer to Site Selection for more information.

- The State filter will default to '**Active**' upon opening. You do not need to select a specific status as the new service can be created in any status.

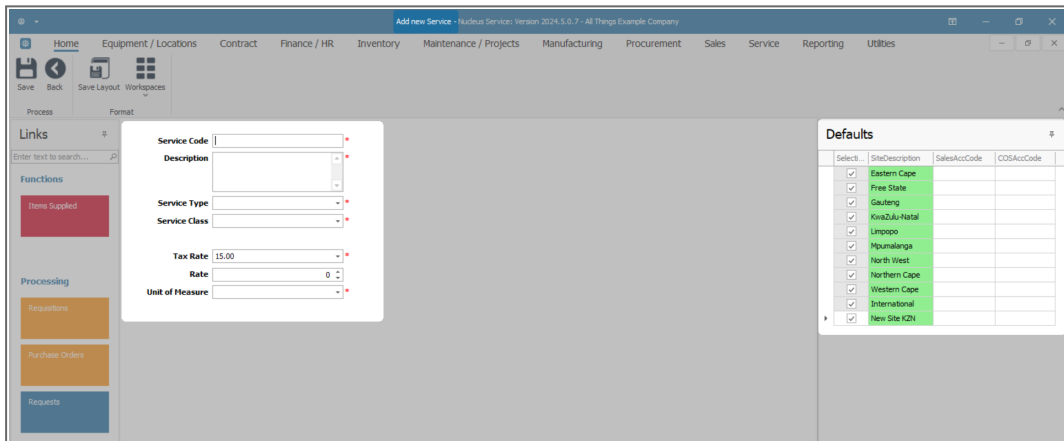> **Note:** Refer to State/Type Selections for more information.

- Click on **Add**.

  ⤤ **Short cut key:  Right click** on a row in the data grid to display the **Process** menu list. Click on **Add**.
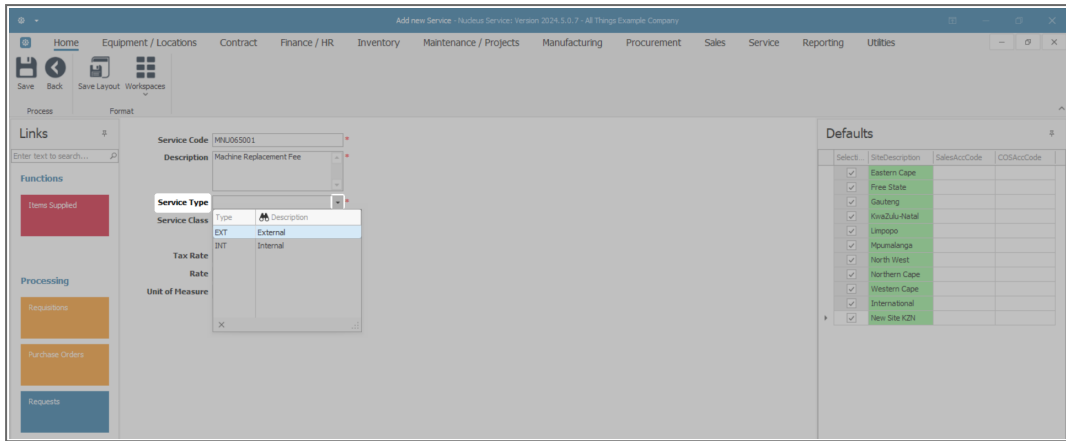
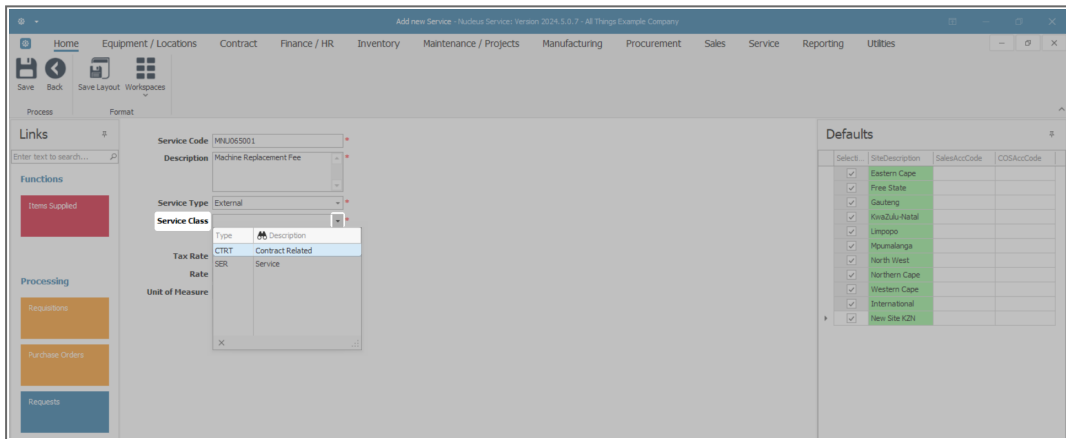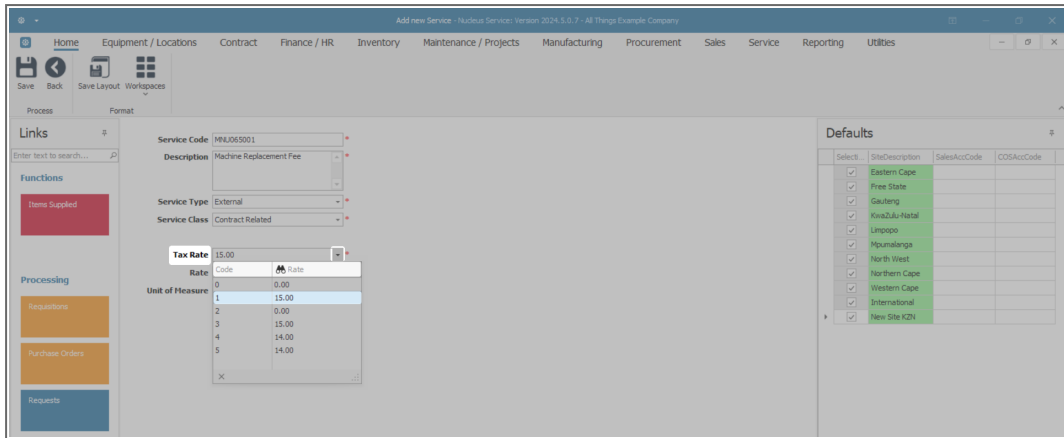- The **Add new Service** screen will display.



# 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.
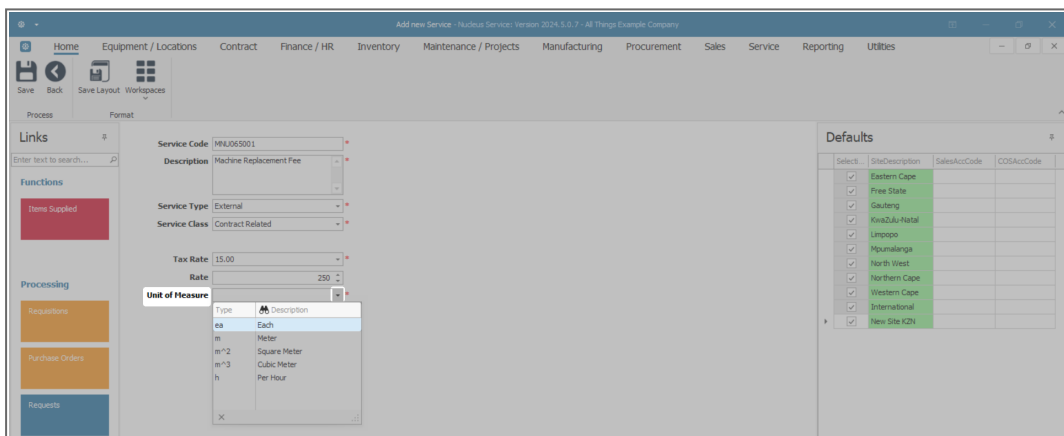  - The example has **External** selected.

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



- **Tax Rate:** Click on the down **arrow** to select the tax rate applicable to this service from the drop-down list.
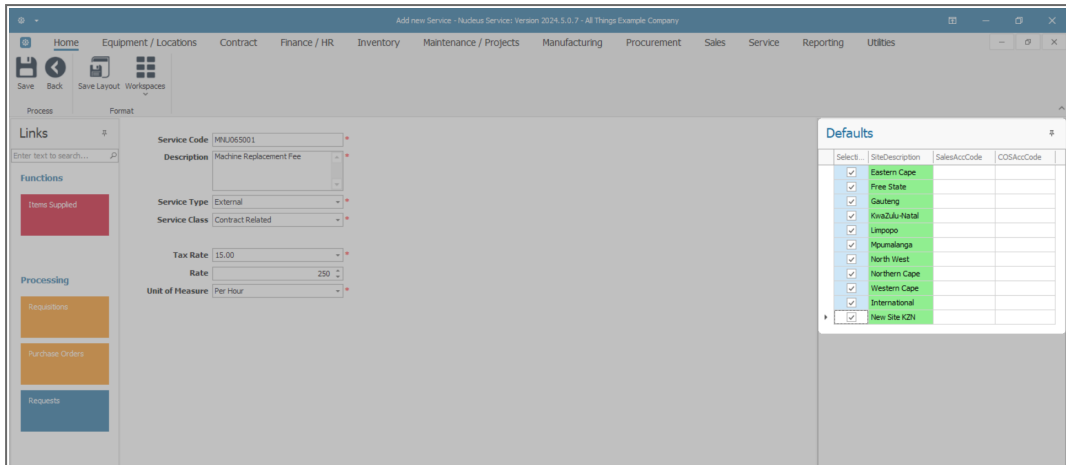
- **Rate: Type** in or use the **directional arrows** to select the rate or price per unit of measure for the service, e.g., **250**.
- **Unit of Measure:** Click on the **drop-down arrow** to list the unit of measure.
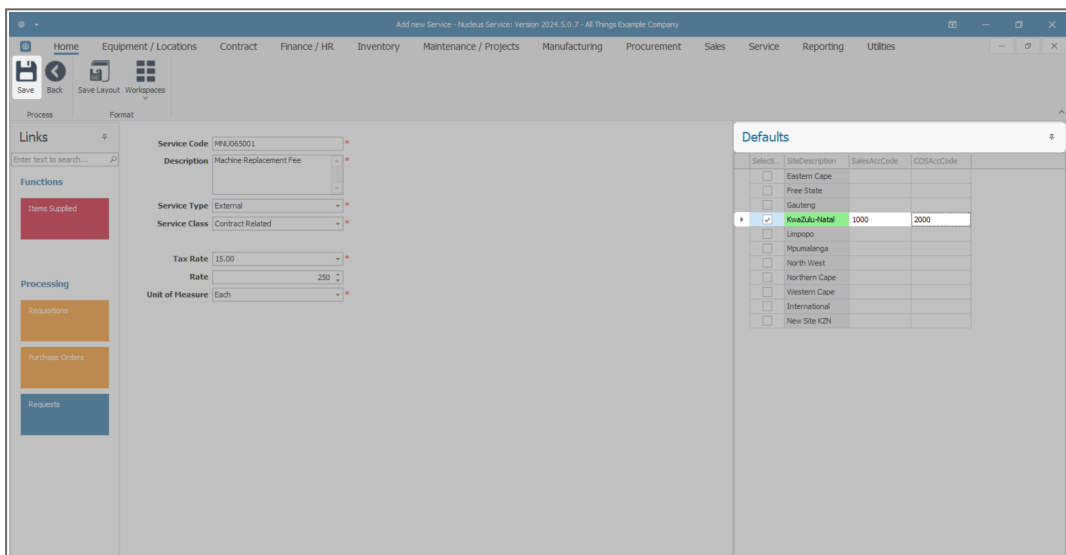  - The example has **each** selected.



# DEFAULTS FRAME

- Click in the **check box(es)** of the **site(s)** you wish to link or unlink to the new service you are creating.
- Type in the relevant **Sales Account Codes** and **COS Account Codes** for each site you are linking.

- When you have finished adding details to the Defaults frame, click on **Save**.



- You will return to the **Service Listing** screen.
- The new service has been added to the list.

## Related Topics

[Sales Services - Add a Service](#)

[Sales Services - Edit a Service](#)

[Sales Services - Delete a Service](#)

[Sales Services - View a Service](#)

[Sales Services - Link a Supplier](#)

[Sales Services - Add a Purchase Requisition](#)

[Sales Services - Purchase Orders](#)

[Sales Services - View Service Request List](#)

[Sales Services - Items Supplied Add / Link Supplier](#)

[Sales Services - Items Supplied Edit Supplier](#)

[Sales Services - Items Supplied Delete Supplier](#)

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