

# SALES

## SERVICES – ITEMS SUPPLIED

From the **Items Supplied** tile in the **Links** panel, you can -

- [Add / Link](#) a Supplier to a Service Definition.
- [Edit](#) Supplier Information.
- [Delete / Remove](#) a Supplier from a Service.

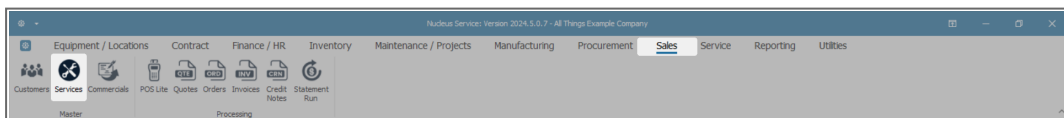
The system facilitates multiple suppliers per service definition, but only one supplier is marked as the **primary** supplier and will be the default supplier when purchase requisitions are raised. This can be changed on the purchase requisition if the stock is sourced from a different supplier.

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 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** where the service can be located.
  - The example has **KwaZulu-Natal** selected.

Note: Refer to [Site Selection](#) for more information.

- The State filter will default to '**Active**' upon opening and must not be changed for this process.

Note: Refer to [State/Type Selections](#) for more information.

- Select the **row** of the Service you wish to **link a supplier** to.
- Click on the **Items Supplied** tile in the **Links** panel.

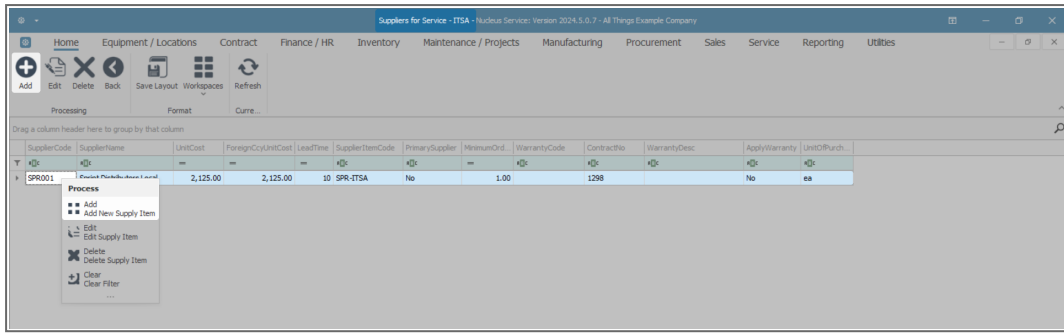
The screenshot shows a software interface with a top navigation bar containing various menu items like Home, Equipment / Locations, Contract, Finance / HR, Inventory, Maintenance / Projects, Manufacturing, Procurement, Sales, Service, Reporting, and Utilities. Below this is a toolbar with icons for Add, Edit, Delete, View, Save Layout, Workspaces, and a dropdown menu currently set to 'Active'. The main area is a table titled 'Service Listing' with columns: ServiceCode, ServiceDescription, Type, Class, Rate, Units, TaxType, TaxRate, and Status. The table contains 20 rows of service data. On the left side, there is a 'Links' panel with a search bar and several function tiles: 'Items Supplied' (highlighted in red), 'Requisitions', 'Purchase Orders', and 'Requests'.

ServiceCode	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxRate	Status
IMP	Implementations	INT	SER	1,000.00	ea	VAT	15.00	A
INF5	Insurance and Financial Services	INT	SER	1,250.00	ea	VAT	15.00	A
ITDA	IT Database Administration	INT	SER	1,500.00	ea	VAT	15.00	A
ITHS	IT Hardware Services	INT	SER	1,750.00	ea	VAT	15.00	A
ITSDY	IT Software Deployment	INT	SER	2,000.00	ea	VAT	15.00	A
ITSDV	IT Software Development	INT	SER	2,250.00	ea	VAT	15.00	A
ITSA	IT Systems Administration	INT	SER	2,500.00	ea	VAT	15.00	A
LGS	Landscaping and Garden Services	INT	SER	1,000.00	ea	VAT	15.00	A
LA	Legal Aid	INT	SER	1,250.00	ea	VAT	15.00	A
MP	Maintenance Planning	INT	SER	1,500.00	ea	VAT	15.00	A
MAN	Manufacturing Planning	INT	SER	1,750.00	ea	VAT	15.00	A
MB	Marketing and Branding	INT	SER	2,000.00	ea	VAT	15.00	A
NCS	Nutrition Consulting Services	INT	SER	2,250.00	ea	VAT	15.00	A
OP	Operational Planning	INT	SER	2,500.00	ea	VAT	15.00	A
OS	Outsourcing Services	INT	SER	1,000.00	ea	VAT	15.00	A
PP	Project Planning	INT	SER	1,250.00	ea	VAT	15.00	A
QA	Quality Assurance	INT	SER	1,500.00	ea	VAT	15.00	A
RSC	Recycling Services	INT	SER	1,750.00	ea	VAT	15.00	A
SAF	Safety Audit	INT	SER	2,000.00	ea	VAT	15.00	A
SAS	Sales Services	INT	SER	2,250.00	ea	VAT	15.00	A
SEC	Security Consulting	INT	SER	2,500.00	ea	VAT	15.00	A
SVH	Server Hosting	INT	SER	1,000.00	ea	VAT	15.00	A
SCO	Service Centre Outsourcing	INT	SER	1,250.00	ea	VAT	15.00	A
SDC	Standards and Certification	INT	SER	1,500.00	ea	VAT	15.00	A
SCC	Stock Control Consulting	INT	SER	1,750.00	ea	VAT	15.00	A
TPC	Technology Platforms Consulting	INT	SER	2,000.00	ea	VAT	15.00	A

- The **Suppliers for Service - [ ]** screen will be displayed.
- Here, you can view a list of all the suppliers currently linked and providing services.
- Click on **Add**.

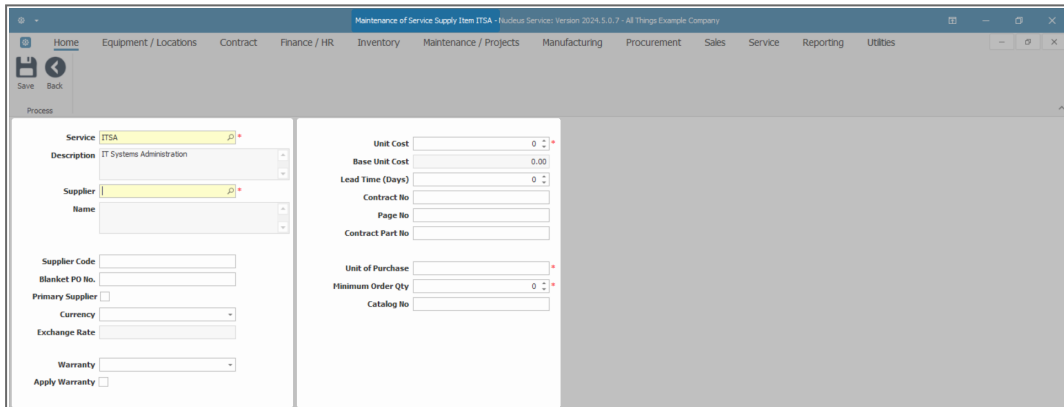


**Short cut key:** Right click on a row in the data grid to display the **Process** menu list. Click on **Add**.



The 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.

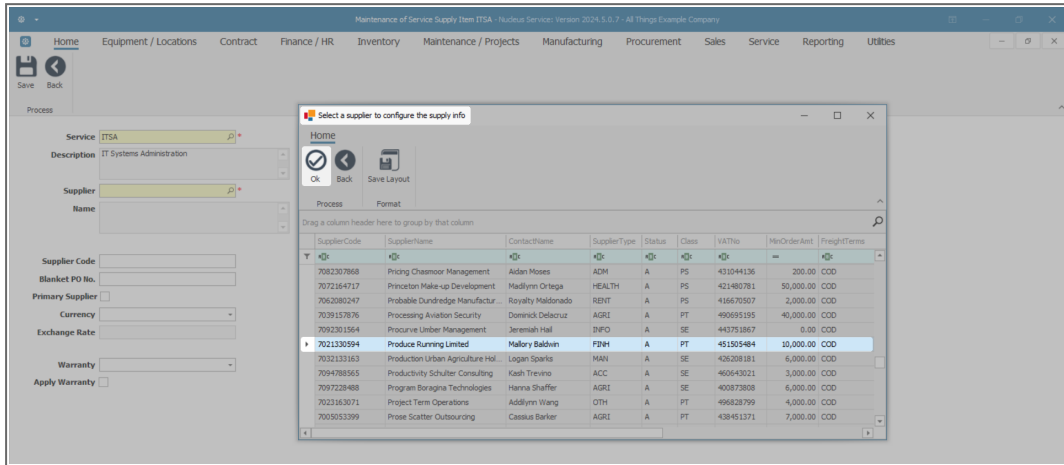
- The **Maintenance of Service Supply Item [ ]** screen will be displayed.



## 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.
  - The **Select a supplier to configure the supply info** screen will display.

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



- **Name:** This field will auto populate with the Supplier Name after you have selected the Supplier Code in the step above.
- **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.
- **Primary Supplier:** Click on the check box if this is the **primary supplier<sup>2</sup>**.

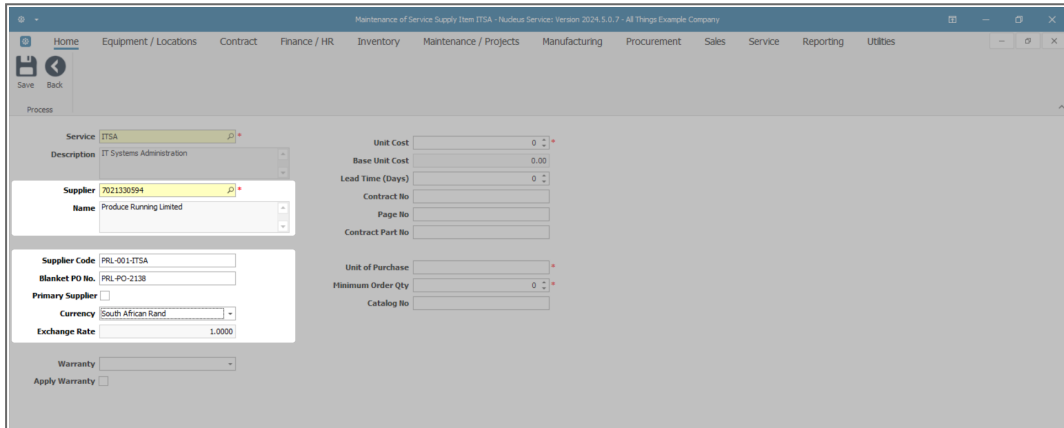
<sup>1</sup>This is the purchase order number relating to the contract if an SLA agreement has been signed with the supplier to procure the service exclusively from them, for a specified period.

<sup>2</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.



Note that each part definition can have only one primary supplier.

- **Currency:** This field will auto populate with the currency already set up on this supplier.
- **Exchange Rate:** The value that is populated by default is pulled from the configured **Exchange Rate** if the supplier has a foreign exchange currency, else this value will be **1**.



## DEFAULT WARRANTY DETAILS

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

<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.

The screenshot shows the 'Maintenance of Service Supply Item' form. The 'Warranty' dropdown menu is open, displaying a list of options: 1 Month Supplier Warranty, 2 Month Supplier Warranty, 3 Month Supplier Warranty, 4 Month Supplier Warranty, 5 Month Supplier Warranty, 6 Month Supplier Warranty, 7 Month Supplier Warranty, and 1 Month Extended Warranty. The 'Apply Warranty' checkbox is visible below the dropdown.

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

The screenshot shows the same 'Maintenance of Service Supply Item' form, but with the 'Warranty' dropdown menu closed. The 'Apply Warranty' checkbox is now visible and unchecked.

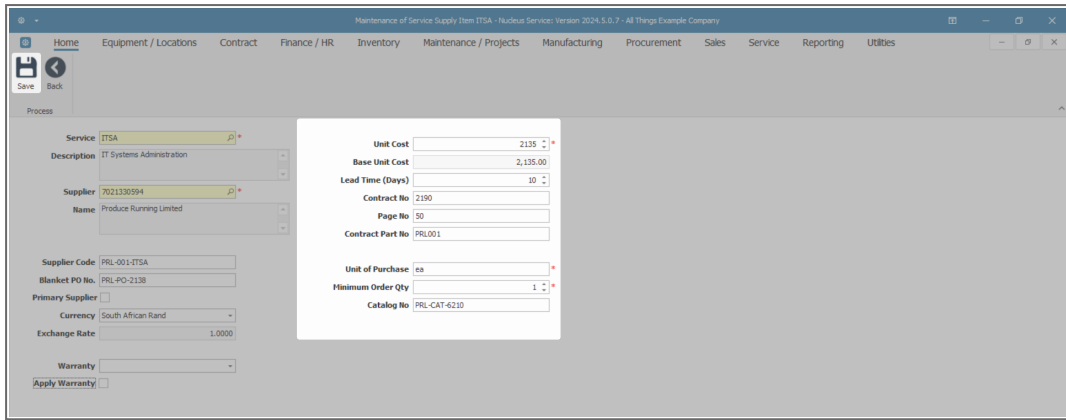
## ORDERING

- **Unit Cost:** Type in the cost per unit.
- **Base Unit Cost:** This field is greyed out as it is not editable 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's currency, and the **Exchange Rate** field is blank, then the **Base Unit Cost** figure will be the same as the **Unit Cost** figure.

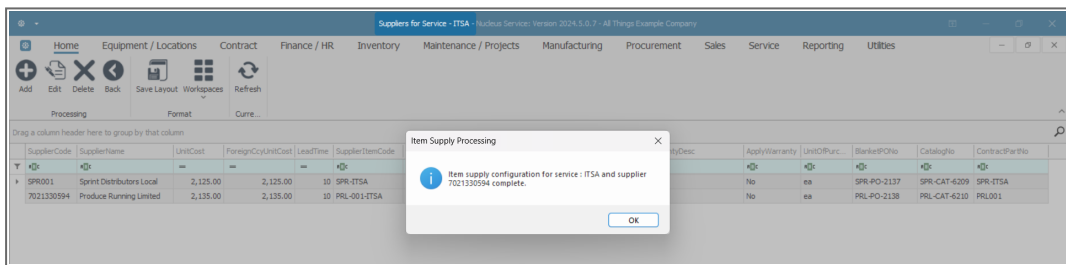
- **Lead Time<sup>1</sup> (Days):** Type in the lead time (in days). The expected delivery date for the service is calculated based on the Purchase Order date, plus the supplier lead time.
- **Contract No:** If you have a contract with the Supplier, type in the contract number or leave this field blank 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 of 10 items per order.
- **Catalog No:** Type in the catalogue number as per the supplier's catalogue, if applicable.
- When you have finished adding the details for the Supplier, click on **Save**.

---

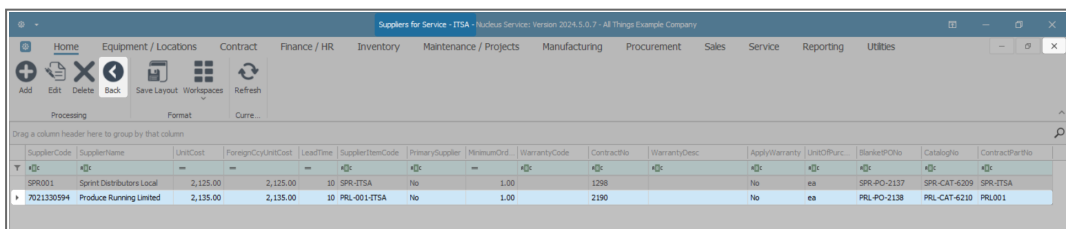
<sup>1</sup>The lead time is the amount of time between when an order is placed with a supplier and the time that order is delivered and received by the company.



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



- The Supplier details for the service you have linked will be listed on the **Suppliers for Service [ ]** screen.
- Click on **Back** or **close** the screen to return to the Service listing screen.





### 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](#)

MNU.065.002

