

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

SALES

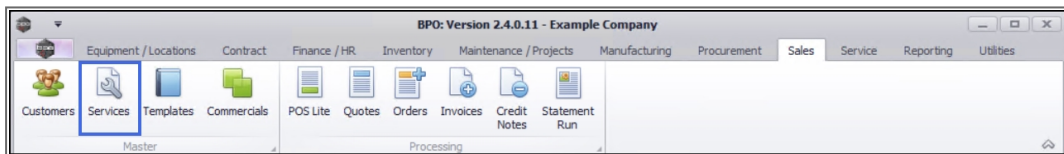
INTRODUCTION TO SERVICES

A service is a non-stock item provided to your client:

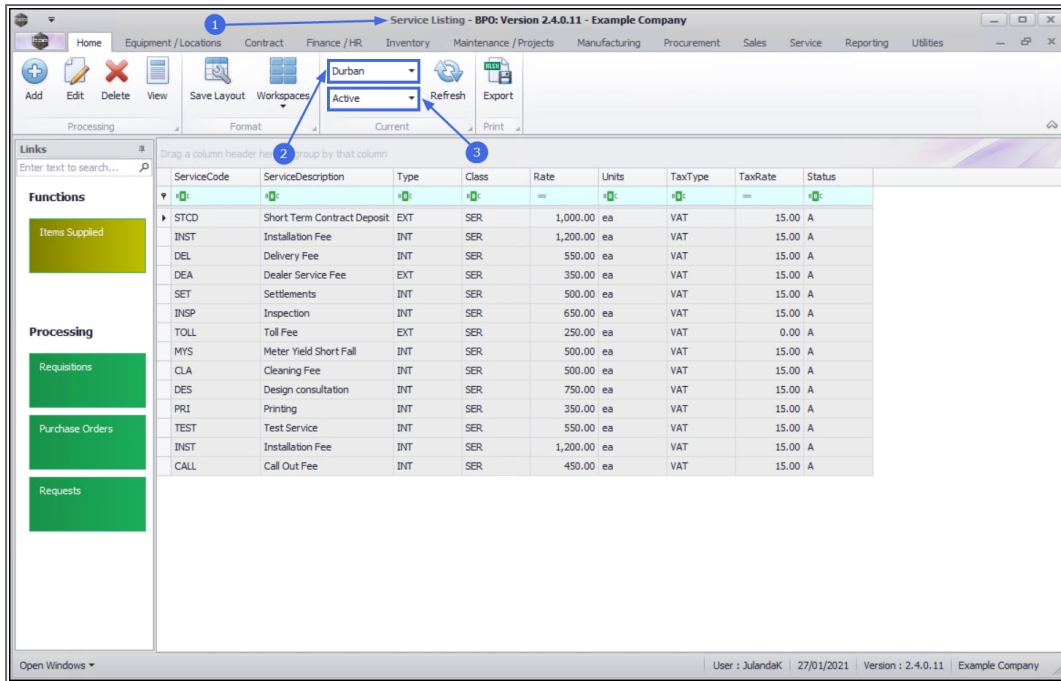
- **Internal Service (INT)** : Is a service performed by the company.
- **External Service (EXT)** : Is any service performed by a third party supplier, via purchase order and non-Stock GRN.

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 therefore has **Active** selected.



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.

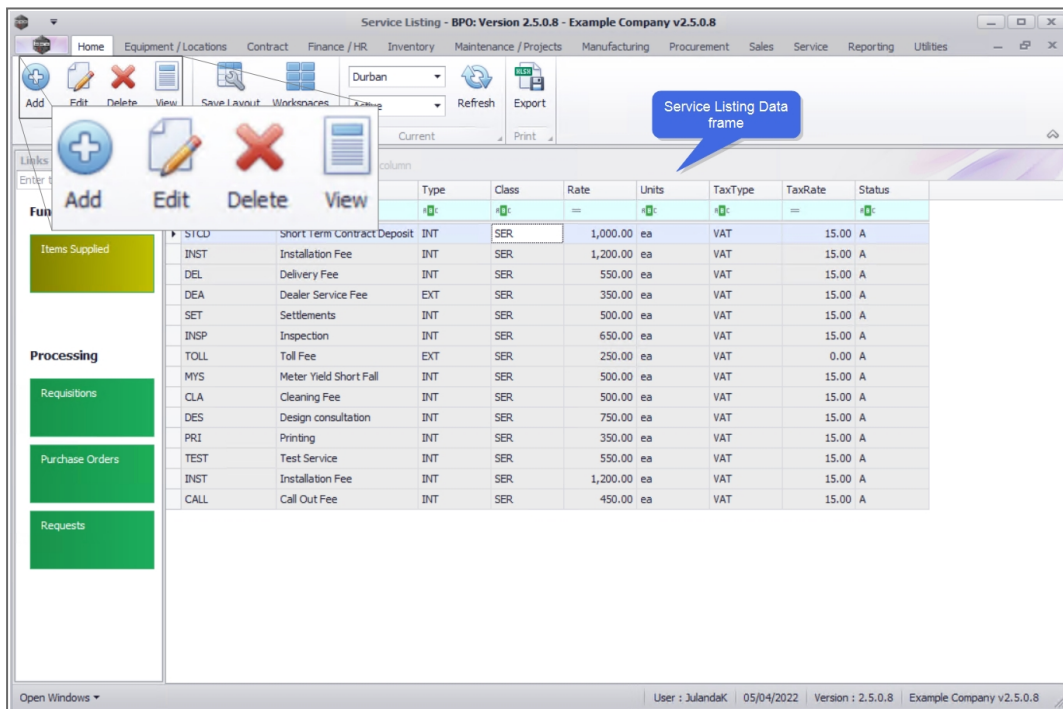
SERVICE LISTING DATA FRAME

- **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

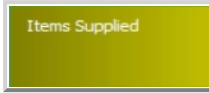
- Click on **Add** to create a new Service. Refer to [Services - Add a Service](#)
- Click on **Edit** to make changes to the information on an existing Service. Refer to [Services - Edit a Service](#)
- Click on **Delete** to remove a Service that is no longer required. Refer to [Services - Delete a Service](#)
- **View** enables you to view information about a Service. Refer to [Services - View a Service](#)



The screenshot displays the 'Service Listing - BPO: Version 2.5.0.8 - Example Company v2.5.0.8' application. The ribbon toolbar includes buttons for Add, Edit, Delete, and View. A callout box labeled 'Service Listing Data frame' points to the table below.

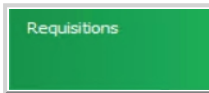
Type	Class	Rate	Units	TaxType	TaxRate	Status
INT	SER	=	ea	VAT	=	A
STCD	Short term contract Deposit	1,000.00	ea	VAT	15.00	A
INST	Installation Fee	1,200.00	ea	VAT	15.00	A
DEL	Delivery Fee	550.00	ea	VAT	15.00	A
DEA	Dealer Service Fee	350.00	ea	VAT	15.00	A
SET	Settlements	500.00	ea	VAT	15.00	A
INSP	Inspection	650.00	ea	VAT	15.00	A
TOLL	Toll Fee	250.00	ea	VAT	0.00	A
MYS	Meter Yield Short Fall	500.00	ea	VAT	15.00	A
CLA	Cleaning Fee	500.00	ea	VAT	15.00	A
DES	Design consultation	750.00	ea	VAT	15.00	A
PRI	Printing	350.00	ea	VAT	15.00	A
TEST	Test Service	550.00	ea	VAT	15.00	A
INST	Installation Fee	1,200.00	ea	VAT	15.00	A
CALL	Call Out Fee	450.00	ea	VAT	15.00	A

FUNCTIONS TILE

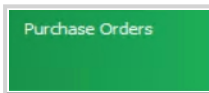


The [Items Supplied tile](#) provides a list of the suppliers linked to the service. You can **Add**, **Edit** or **Delete** suppliers to a Service. Refer to [Services - Items Supplied](#)

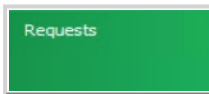
PROCESSING TILES



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](#)



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](#)



The [Requests tile](#) will display a list of all the Service Requests linked to the Service. Refer to [Services - Requests](#)

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