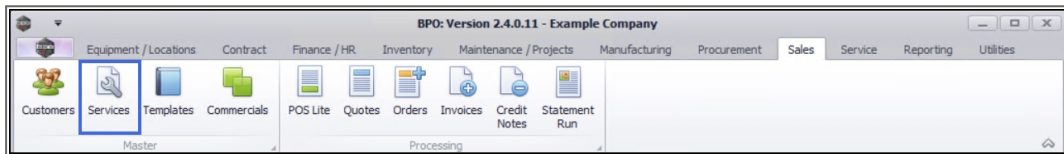# SALES

SERVICES – ADD A SERVICE

Ribbon Access: *Sales > Services*

1. The *Service Listing* screen will display.
2. Select the *Site* where you wish to create the service.
   - The example has *Durban* selected.
3. You do not need to specify a *Status* as the new service can be created in any status. The new service will however display in the *Active* status screen.
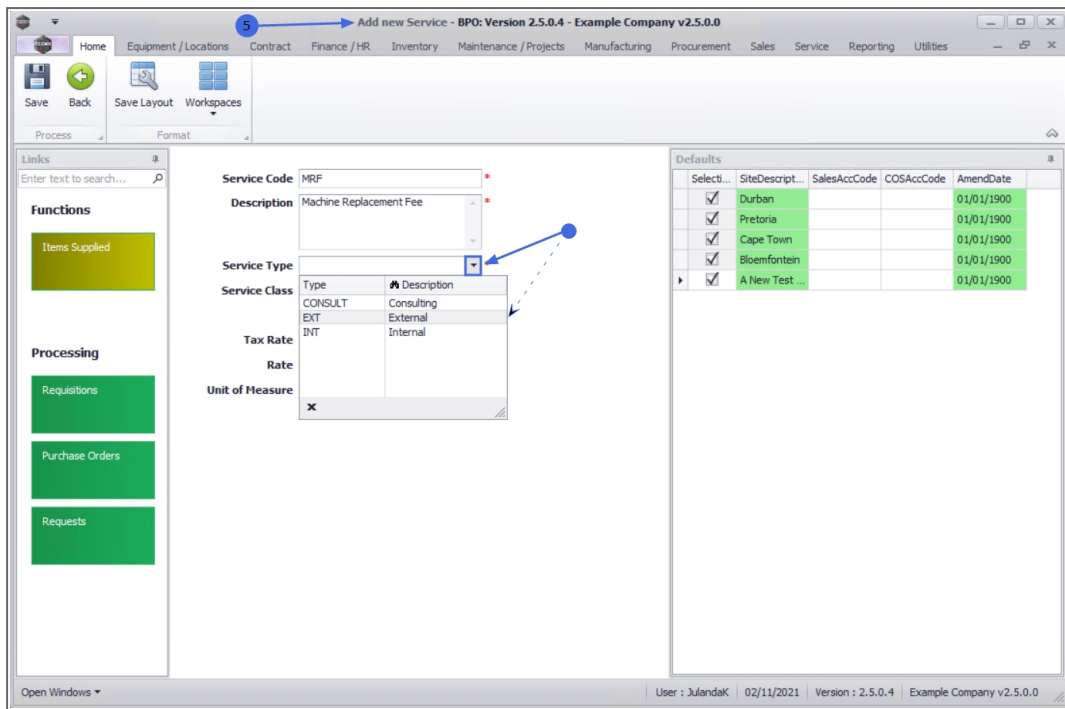   - The example has therefore *Active* selected.
4. Click on *Add*.

> Short cut key: *Right click* to display the *Process* menu list. Click on *Add*.
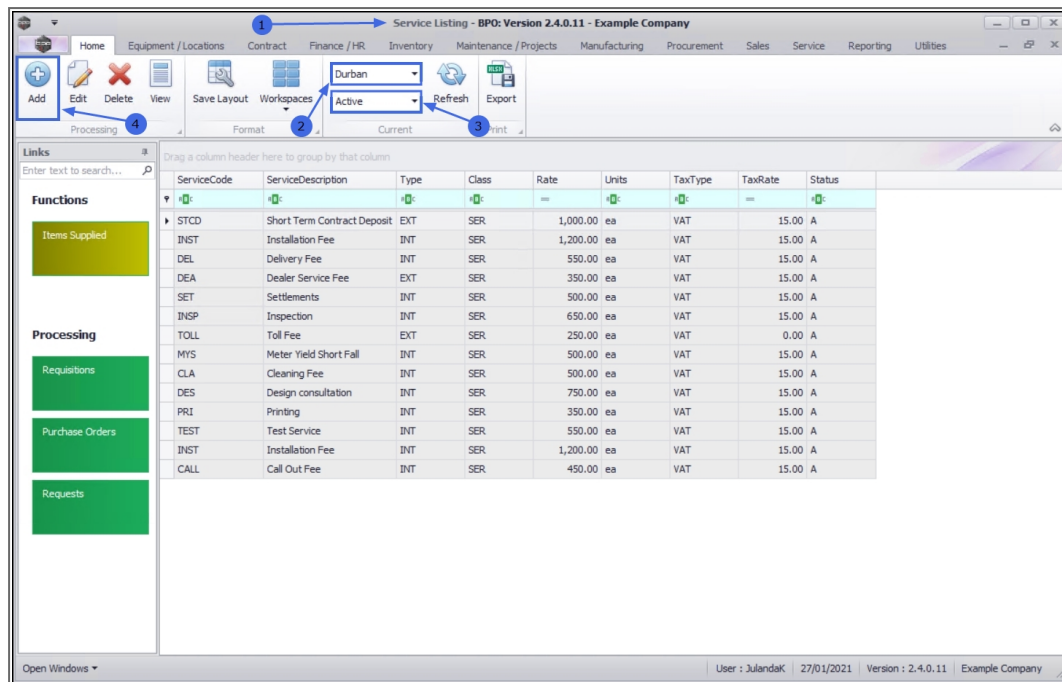
5. The *Add new Service* screen will display.

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.
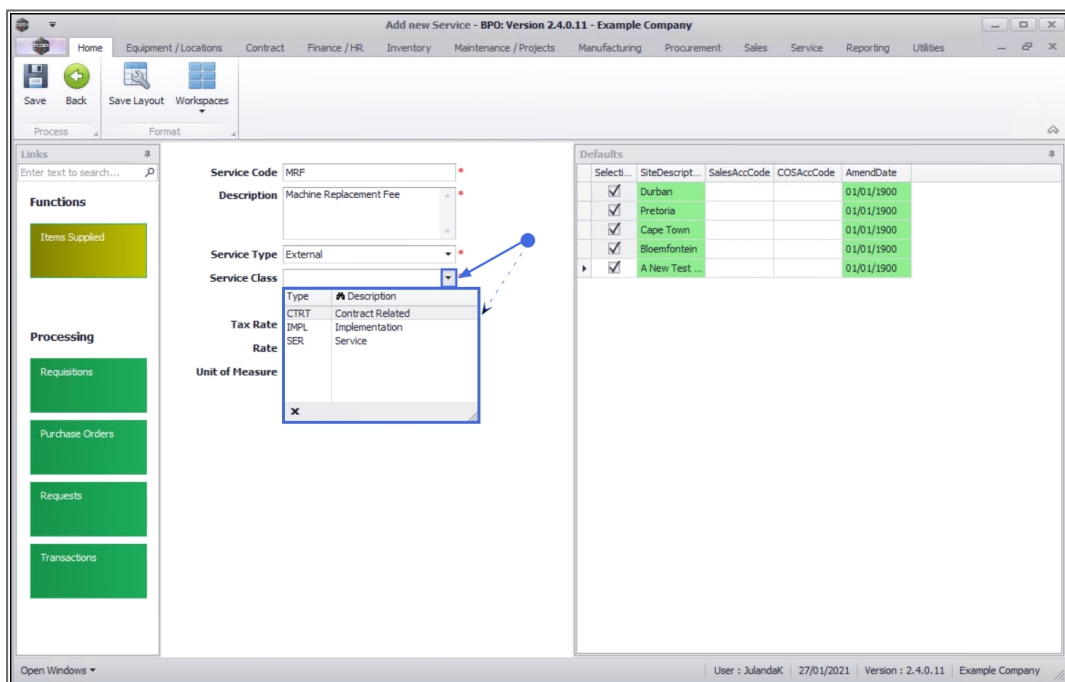
- **Service Class:** Click on the down *arrow* to select the service class that applies to your service type.
  - The example has *Contract Related* selected.
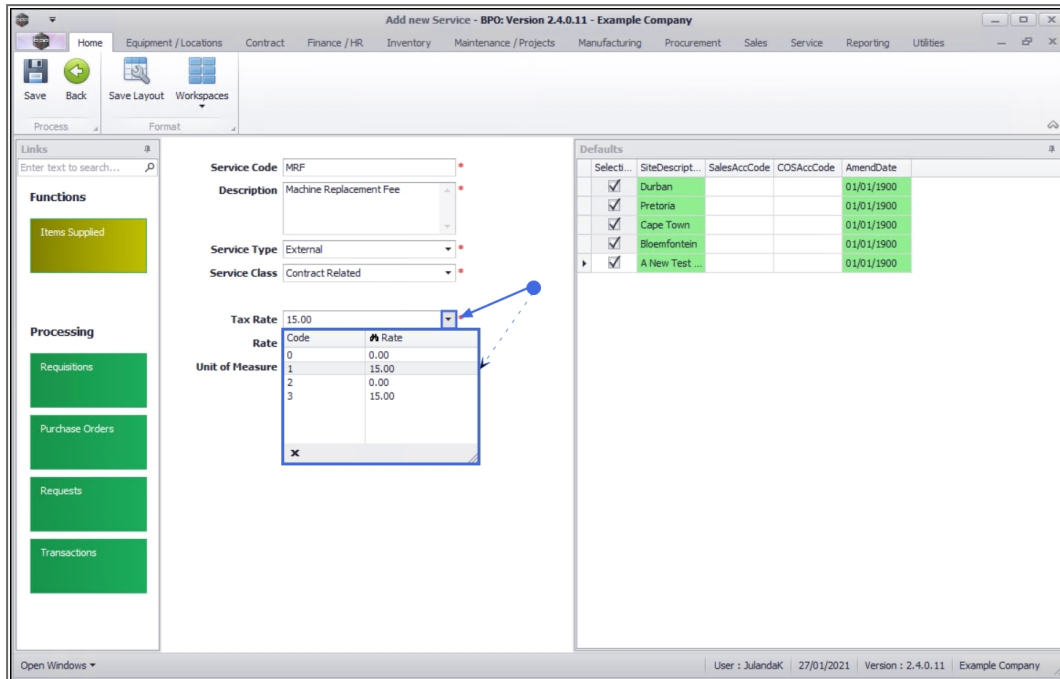
- **Tax Rate:** Click on the down *arrow* to select the tax rate applicable to this service from the drop-down list.
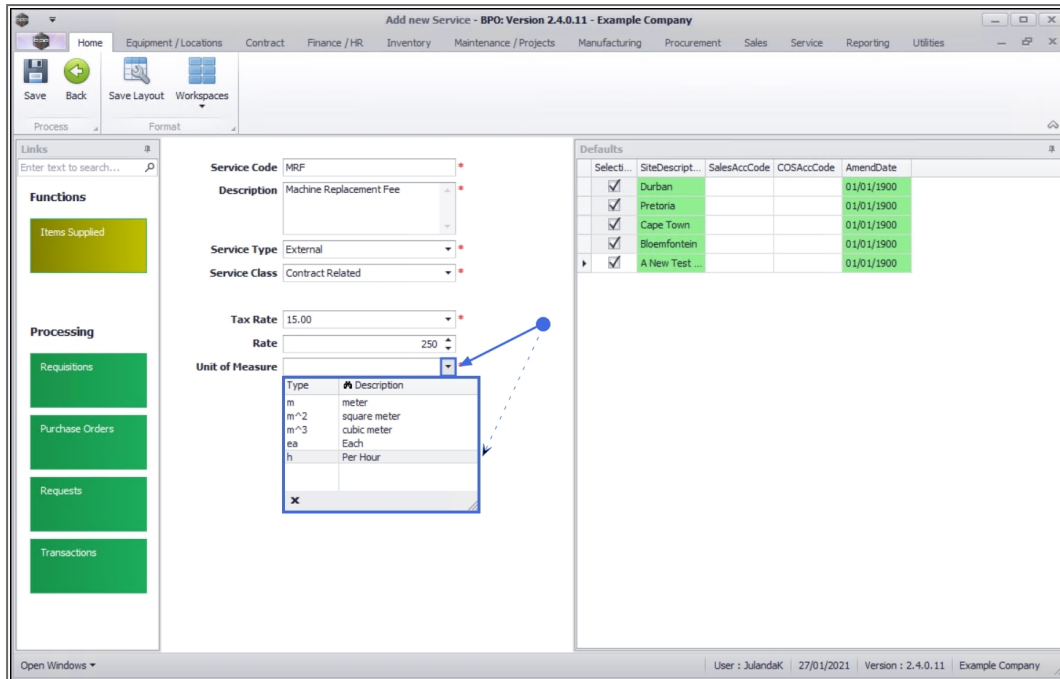
- **Rate:** *Type* in or use the *directional arrows* to select the rate or price per unit of measure for the sevice, e.g. **250**.
- **Unit of Measure:** Click on the *drop-down arrow* and to list the unit of measure.
  - The example has *Per Hour* selected.

DEFAULTS FRAME

6. Click in the *check box(es)* of the *site(s)* you wish to link or un-link the new service you are creating.

7. Type in the relevant Pastel *Sales Account Codes* and *COS Account Codes* for each site you are linking.

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

9. You will return to the *Service Listing* screen.

10. The new service has been added to the list.

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