

SALES

SERVICES – ITEMS SUPPLIED

From the items supplied tile you can;

- Add /Link A Supplier to A Service Definition
- Edit a Supplier Information
- Delete/Remove a Supplier from a Service

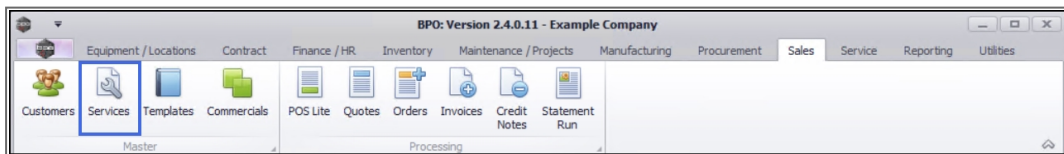
The system facilitates multiple suppliers per service definition, but only one supplier is marked as the **primary** supplier and will be the default supplier when purchase requisitions are raised. This can be changed on the purchase requisition if the stock is sourced from a different supplier.

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 Access: *Sales > Services*



1. The **Service Listing** screen will display.
2. Select the **Site** where the service can be located.
 - The example has **Durban** selected.
3. Change the **Status** to **Active**.

Service Listing - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting

Add Edit Delete View Save Layout Workspaces Durban Active Refresh Export

Processing Format Current Print

Links

Enter text to search...

Functions

Items Supplied

Processing

Requisitions

Purchase Orders

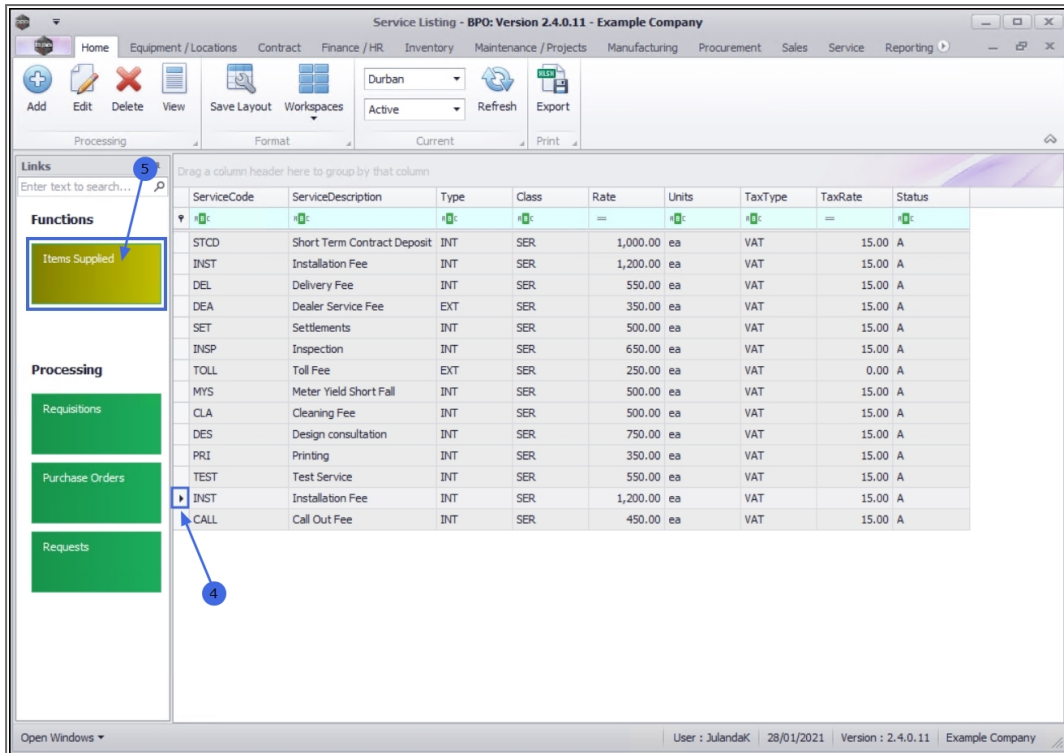
Requests

ServiceCode	ServiceDescription	Type	Class	Rate	Units	TaxType	TaxRate	Status
STCD	Short Term Contract Deposit	INT	SER	1,000.00	ea	VAT	15.00	A
INST	Installation Fee	INT	SER	1,200.00	ea	VAT	15.00	A
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	A
TOLL	Toll Fee	EXT	SER	250.00	ea	VAT	0.00	A
MYS	Meter Yield Short Fall	INT	SER	500.00	ea	VAT	15.00	A
CLA	Cleaning Fee	INT	SER	500.00	ea	VAT	15.00	A
DES	Design consultation	INT	SER	750.00	ea	VAT	15.00	A
PRI	Printing	INT	SER	350.00	ea	VAT	15.00	A
TEST	Test Service	INT	SER	550.00	ea	VAT	15.00	A
INST	Installation Fee	INT	SER	1,200.00	ea	VAT	15.00	A
CALL	Call Out Fee	INT	SER	450.00	ea	VAT	15.00	A

Open Windows

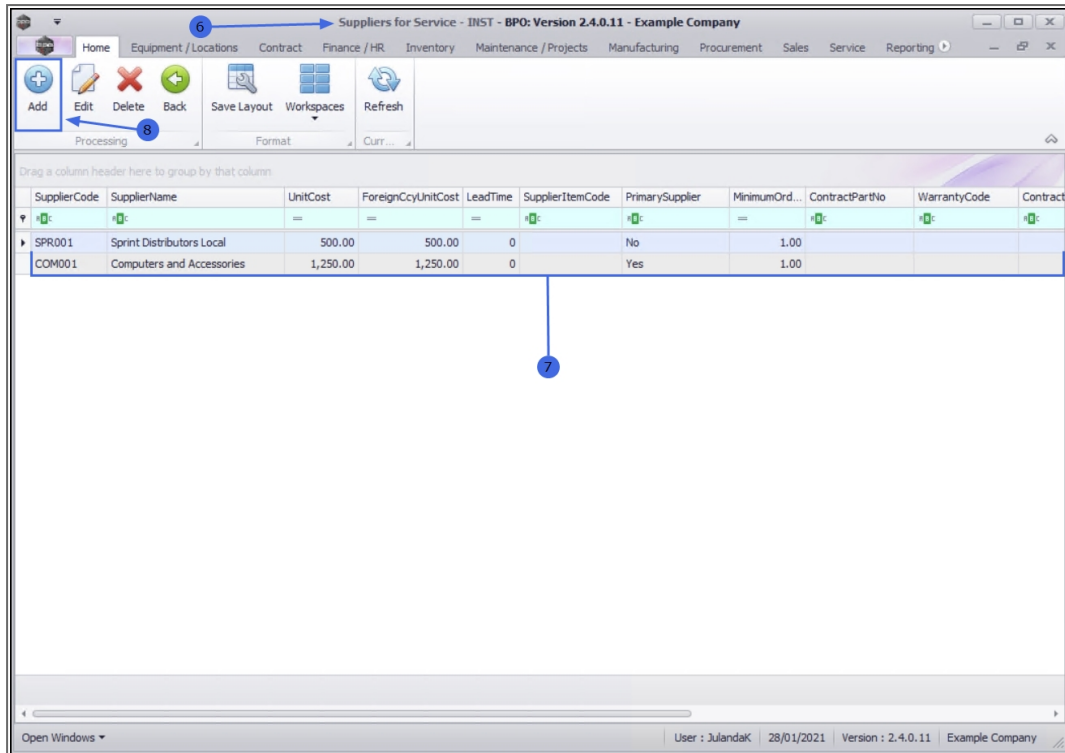
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4. Click on the **row** of the **service** you wish to **link a supplier** to.
5. Click on the **Items Supplied** tile.



6. The **Suppliers for Service - [service code]** screen will be displayed.
7. A list of all the suppliers that are linked to the service and is currently providing a service is displayed.
8. Click on **Add**.

 Short cut key: **Right click** to display the **Process** menu list. Click on **Add**.



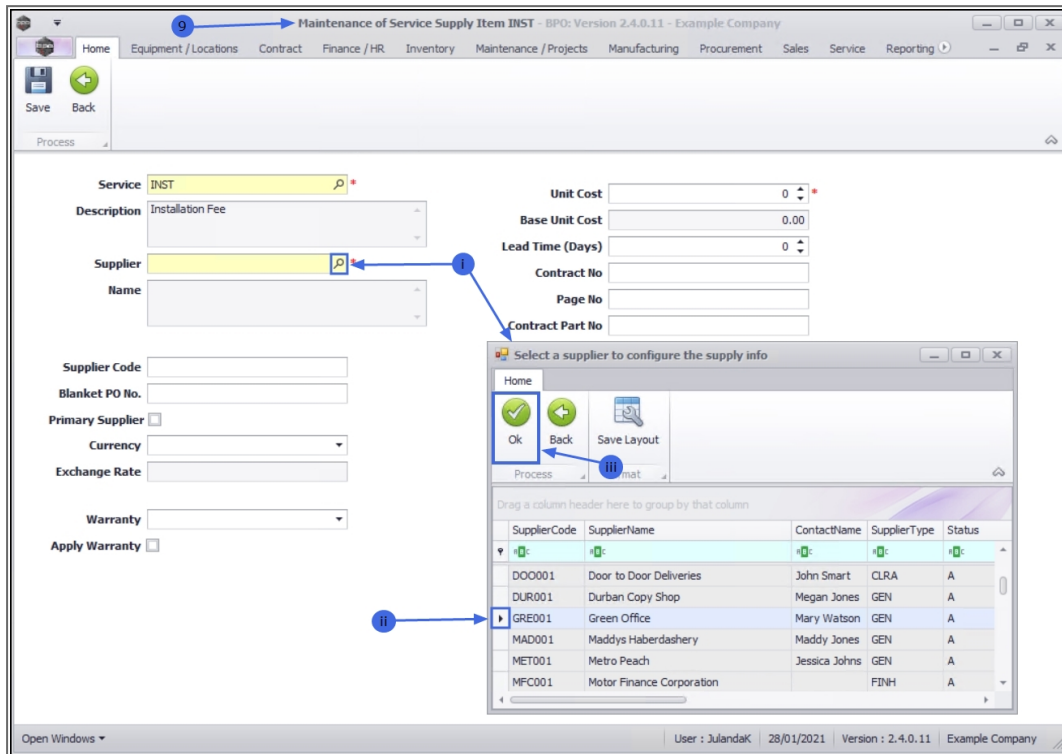
The system will automatically place the linked supplier on a newly created requisition when a supplier has been linked to a service definition, along with the unit cost and lead time linked to that supplier.

9. The **Maintenance of Service Supply Item** [service item code] 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.
 - i. The **Select a supplier to configure the supply info** screen will display.

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



- **Name:** This field will auto populate with the Supplier Name after you have selected the Supplier Code.
- **Supplier Code:** Type in the code used by the Supplier for the service. This will filter through to the purchase order.
- **Blanket PO No¹:** 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.

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

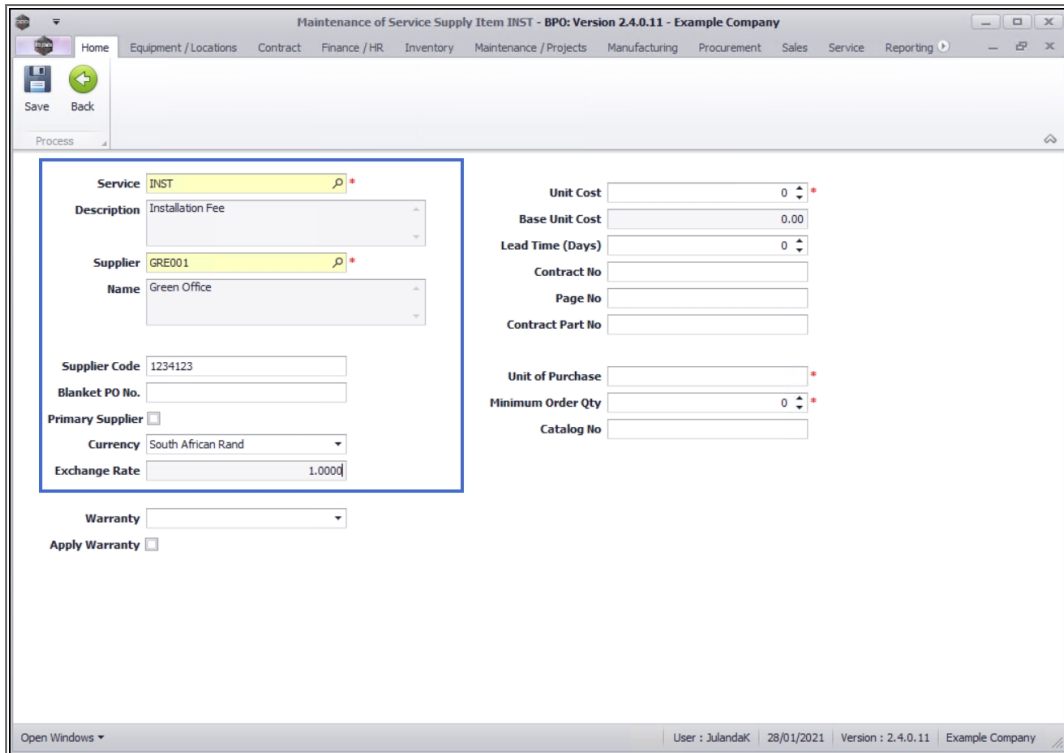
- **Primary Supplier:** Click on the check box if this is the **primary supplier**¹.



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:** If the supplier currency (above) is not the currency used by the company, then this field will populate with the current exchange rate, for instance if the supplier currency field was dollars **\$** and the company currency is rands **R** then this exchange rate field would populate with **10**, as the current exchange rate is **10 rand** for **1 dollar**.

¹This 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.



DEFAULT WARRANTY DETAILS

- **Warranty¹**: If the Supplier offers a warranty for this service, click on the down **arrow** to select the warranty applicable, from the drop-down menu.

¹A 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.

Maintenance of Service Supply Item INST - BPO: Version 2.4.0.11 - Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting

Save Back

Process

Service: INST

Description: Installation Fee

Supplier: GRE001
Name: Green Office

Supplier Code: 1234123

Blanket PO No.:

Primary Supplier:

Currency: South African Rand

Exchange Rate: 1.0000

Unit Cost: 0

Base Unit Cost: 0.00

Lead Time (Days): 0

Contract No.:

Page No.:

Contract Part No.:

Unit of Purchase:

Minimum Order Qty: 0

Catalog No.:

Warranty:

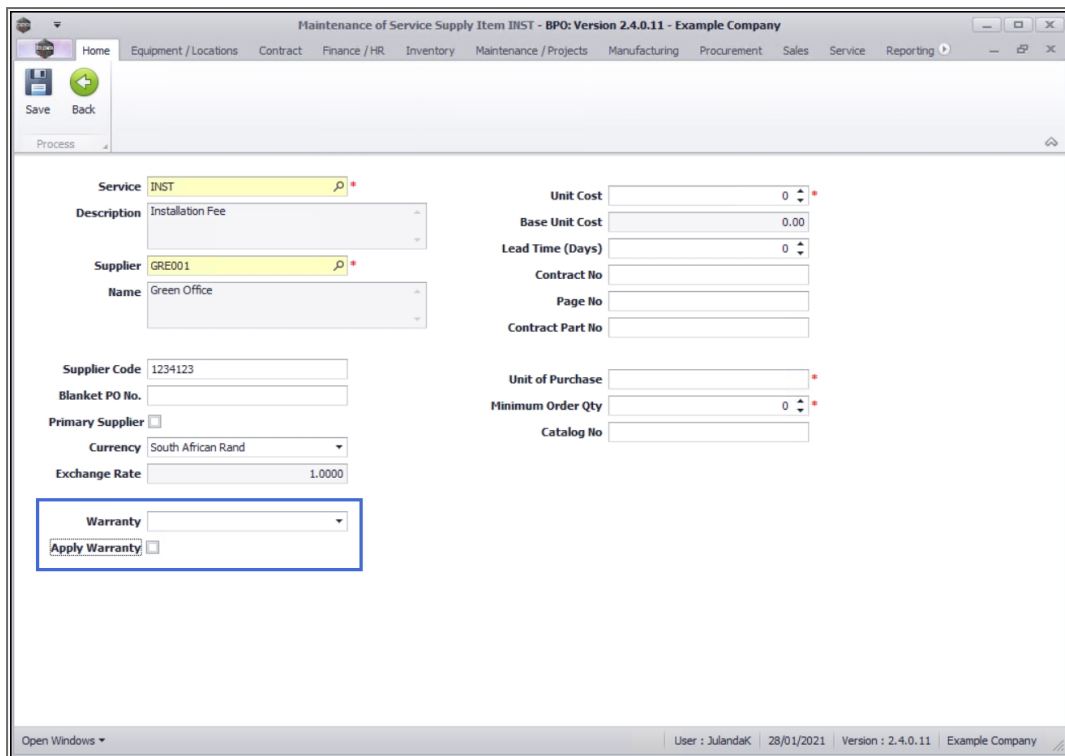
Apply Warranty:

ID	Name
1	24 Month Supplier Warranty
2	12 Month Supplier Warranty
3	1 Year Supplier Warranty
4	3 Months Service Warranty
5	warranty code test
7	Testing
8	TEST

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

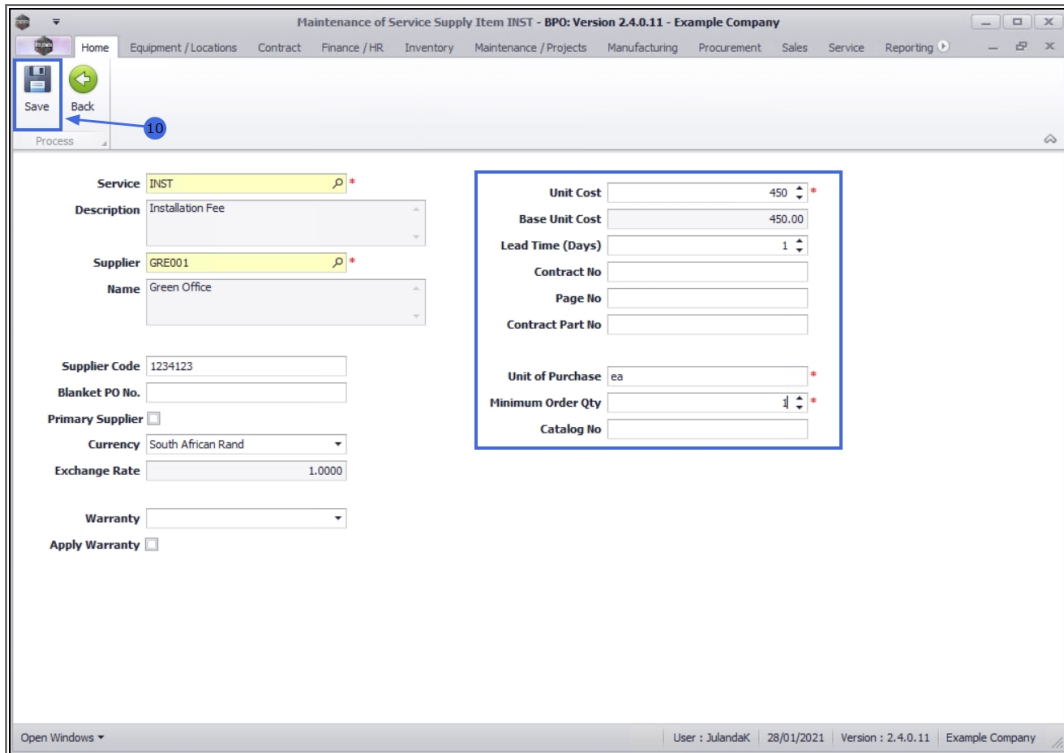


ORDERING

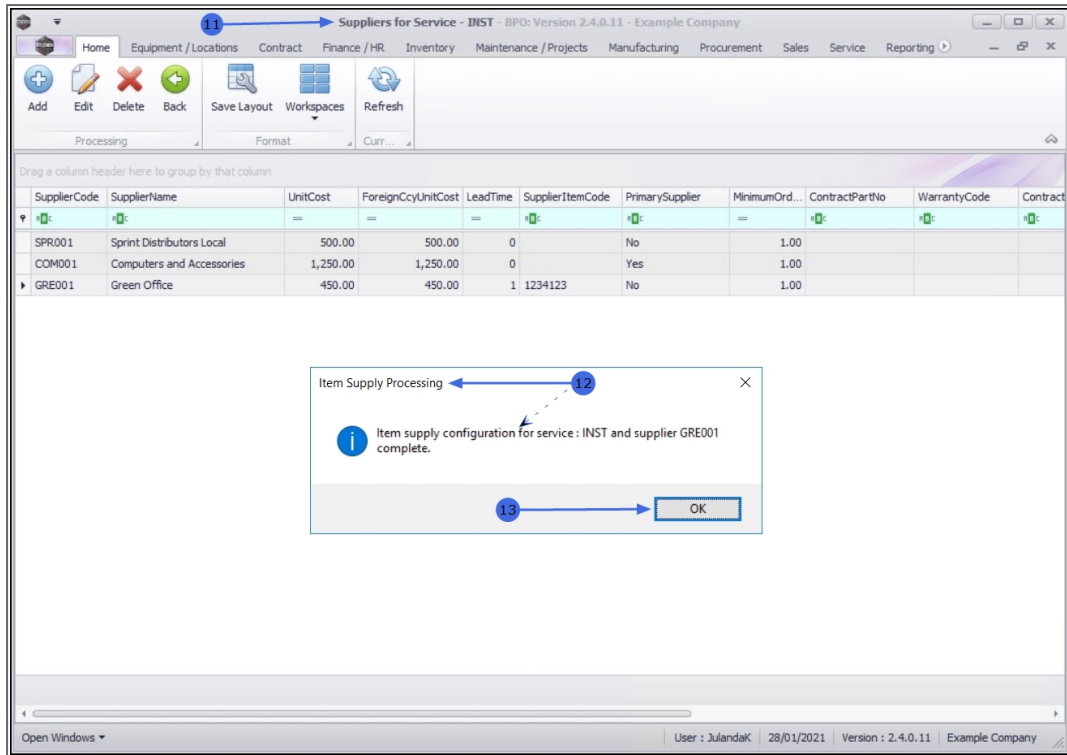
- **Unit Cost:** Type in the cost per unit.
- **Base Unit Cost:** This field is greyed out as it is not edible by the user. The system will calculate this figure according to the entries in the **Unit Cost** and **Exchange Rate** fields. If the supplier **Currency** is the same as the company and the **Exchange Rate** field is blank, then the **Base Unit Cost** figure will be the same as the Unit Cost figure.
- **Lead Time¹ (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*.

¹The 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.

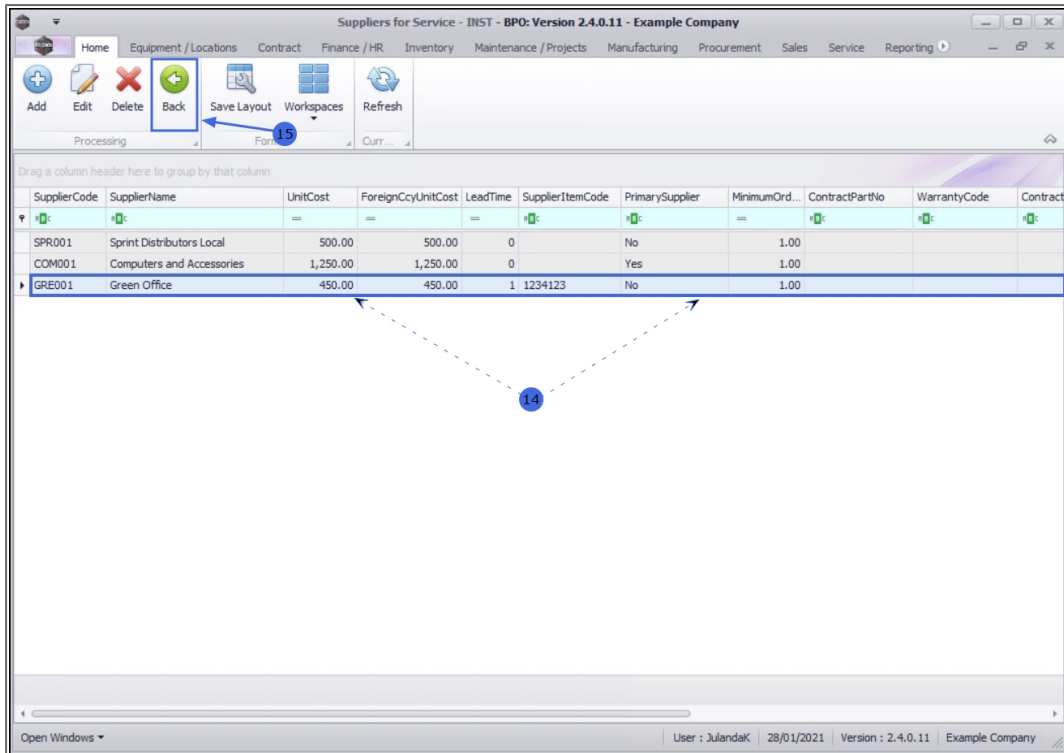
- **Contract No:** If you have a contract with the Supplier, type in the contract number or leave this field blank if not applicable.
 - **Page No:** If you have a **contract** with the Supplier, type in the contract page number that relates to this part or leave this field blank if not applicable.
 - **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 limit of 10 items per order.
 - **Catalog No:** Type in the catalogue number as per the supplier's catalogue, if applicable.
10. When you have finished adding the details for the Supplier, click on **Save**.



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



14. The Supplier details for the service you have linked, will be listed on the **Suppliers for Service** screen.
15. Click on **Back** to return to the Service listing screen.

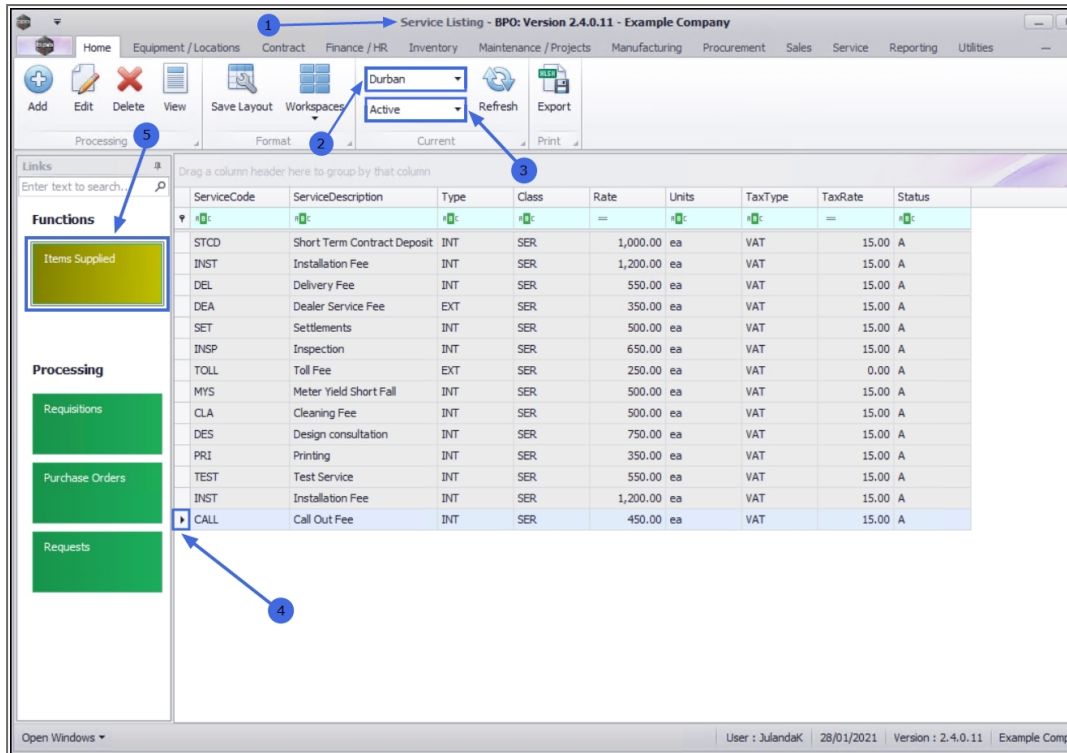


SupplierCode	SupplierName	UnitCost	ForeignCcyUnitCost	LeadTime	SupplierItemCode	PrimarySupplier	MinimumOrd...	ContractParthNo	WarrantyCode	Contract
SPR001	Sprint Distributors Local	500.00	500.00	0		No	1.00			
COM001	Computers and Accessories	1,250.00	1,250.00	0		Yes	1.00			
GRE001	Green Office	450.00	450.00	1	1234123	No	1.00			

EDIT SERVICE ITEM FOR SUPPLIER

You can make changes to the supplier information e.g. update the Unit Cost or change a Supplier for this service.

1. From the Service Listing screen,
2. Select the **Site** where the service can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the service.
 - The example has **Active** selected.
4. Click on the **row** of the Service you need to change.
5. Click on the **Items Supplied** tile.

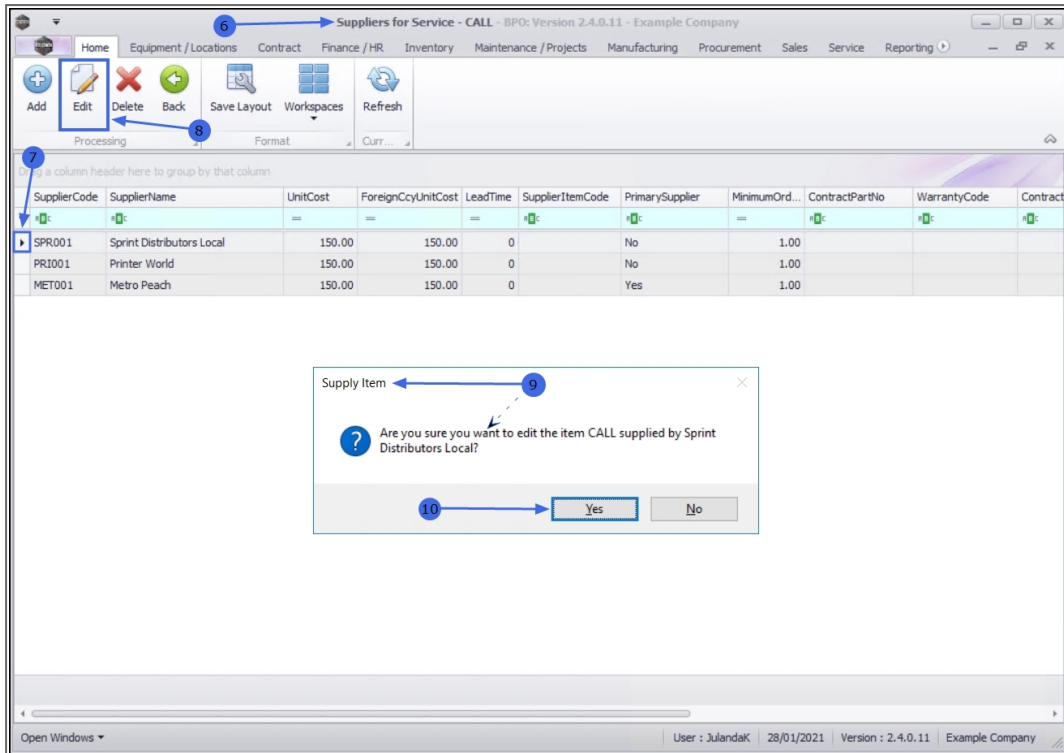


6. From the **Suppliers for Service - [service code]** screen,
7. Click on the **row** of the service the supplier is linked to.
8. Click on **Edit**.



Short cut key: **Right click** to display the **Process** menu list. Click on **Edit**.

9. When you receive the **Supply Item** message to confirm;
 - **Are you sure you want to edit the item [item code] supplied by [supplier name]?**
10. Click on **Yes**.



11. The **Maintenance of Service Supply Item for Supplier [supplier code]** screen will display.
12. For the purpose of this manual, the **Warranty Code** for the Supplier has been updated.

Refer to **"Supplier Identification" on page 4** for details on the fields that needs to edit.
13. After making the required changes, click on **Save**.

Maintenance of Service Supply Item for Supplier SPR001 - BPO: Version 2.4.0.11 - Example Company

Home | Equipment / Locations | Contract | Finance / HR | Inventory | Maintenance / Projects | Manufacturing | Procurement | Sales | Service | Reporting

Save | Back

Process

Service: CALL
Description: Call Out Fee
Supplier: SPR001
Name: Sprint Distributors Local

Unit Cost: 150
Base Unit Cost: 150.00
Lead Time (Days): 0
Contract No.:
Page No.:
Contract Part No.:

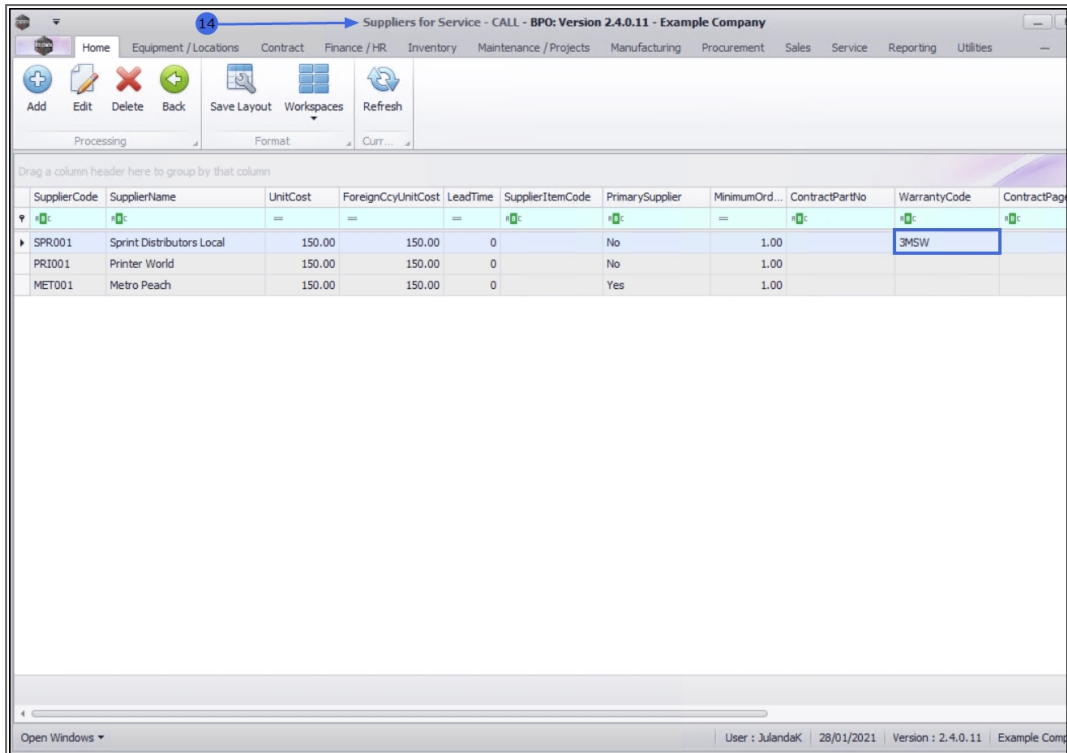
Supplier Code:
Blanket PO No.:
Primary Supplier:
Currency: South African Rand
Exchange Rate: 1.0000

Unit of Purchase: ea
Minimum Order Qty: 1
Catalog No.:

Warranty: 3 Months Service Warranty
Apply Warranty:

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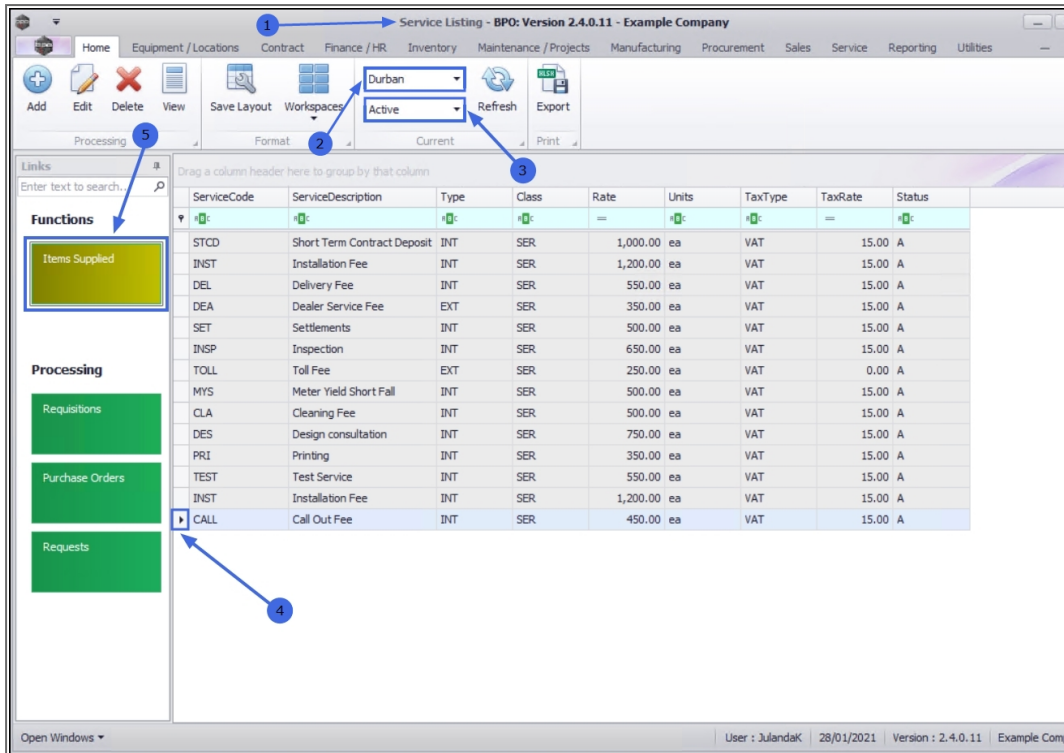
14. You will return to the **Suppliers for Service** screen where you can view the updated information.



SupplierCode	SupplierName	UnitCost	ForeignCcyUnitCost	LeadTime	SupplierItemCode	PrimarySupplier	MinimumOrd...	ContractPartNo	WarrantyCode	ContractPag
SPR001	Sprint Distributors Local	150.00	150.00	0		No	1.00		3MSW	
PRI001	Printer World	150.00	150.00	0		No	1.00			
MET001	Metro Peach	150.00	150.00	0		Yes	1.00			

DELETE/REMOVE A SUPPLIER FOR A SERVICE

1. From the **Service Listing** screen,
2. Select the **Site** where the service can be located.
 - The example has **Durban** selected.
3. Select the **Status** for the service.
 - The example has **Active** selected.
4. Click on the **row** of the Service you need to remove the supplier for.
5. Click on the **Items Supplied** tab.



6. The **Suppliers for Service - [service code]** screen will display.

7. Click on the **row** of the Supplier you wish to remove / delete.

8. Click on **Delete**.

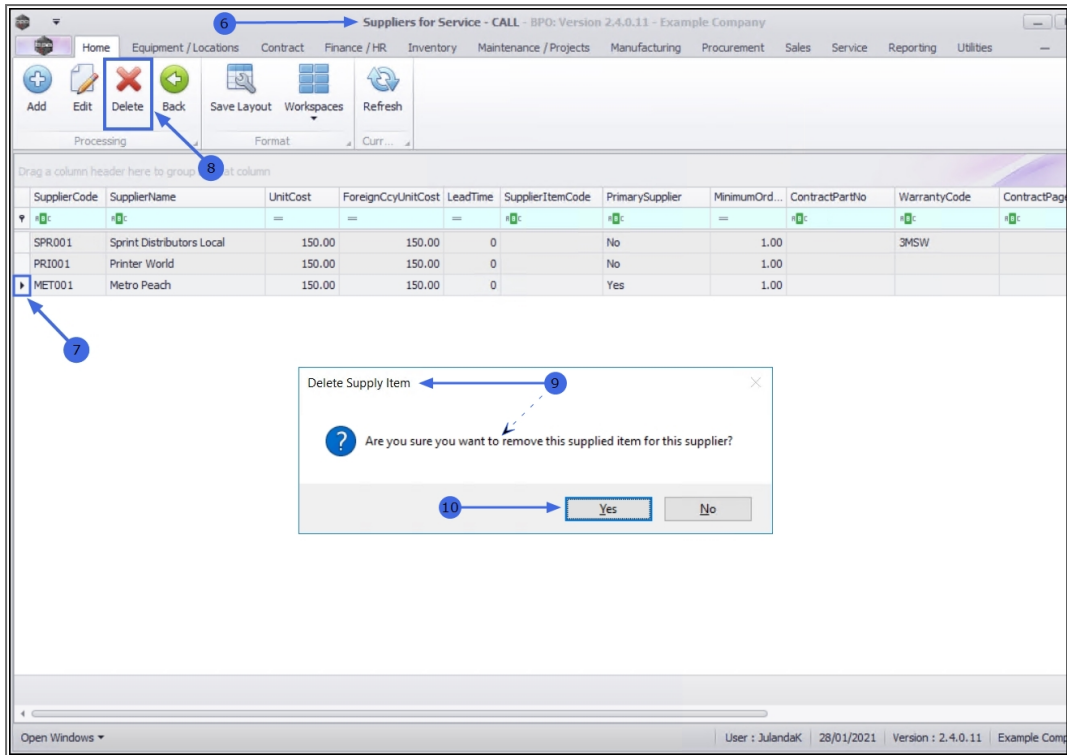


Short cut key: **Right click** to display the **Process** menu list. Click on **Delete**.

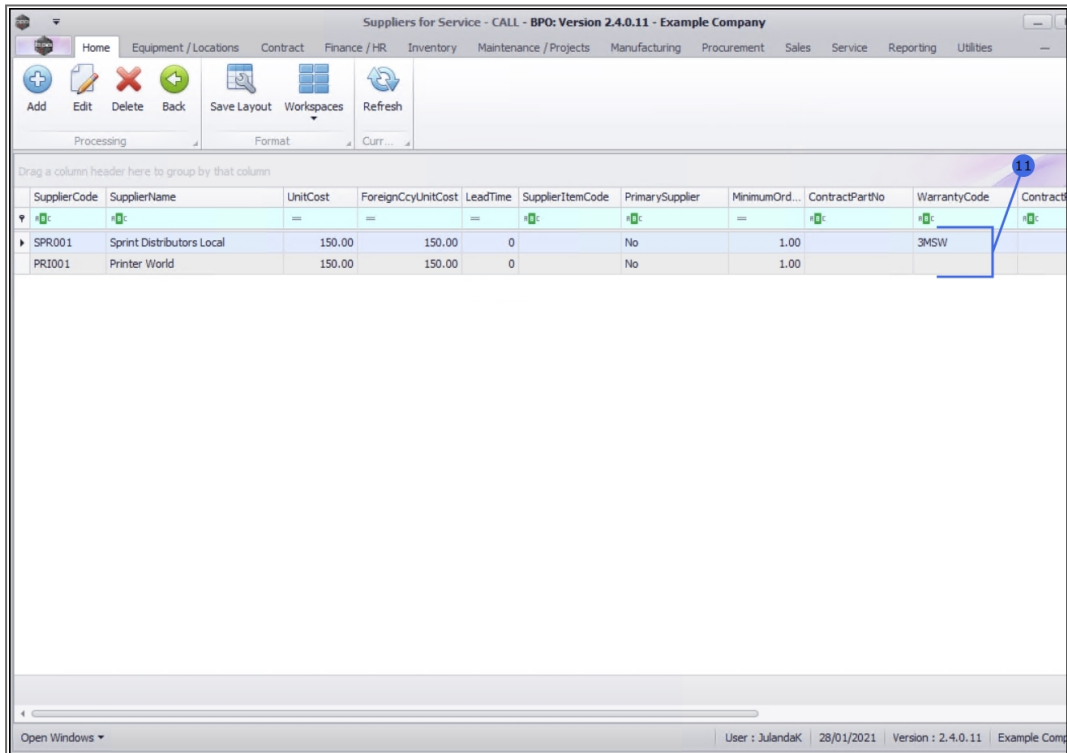
9. When you receive the **Delete Supply Item** message to confirm;

- **Are you sure you want to remove this supplied item from this supplier?**

10. Click on **Yes** in you are certain about your selection.



11. The Supplier has been removed from the *Suppliers for Service* screen.





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