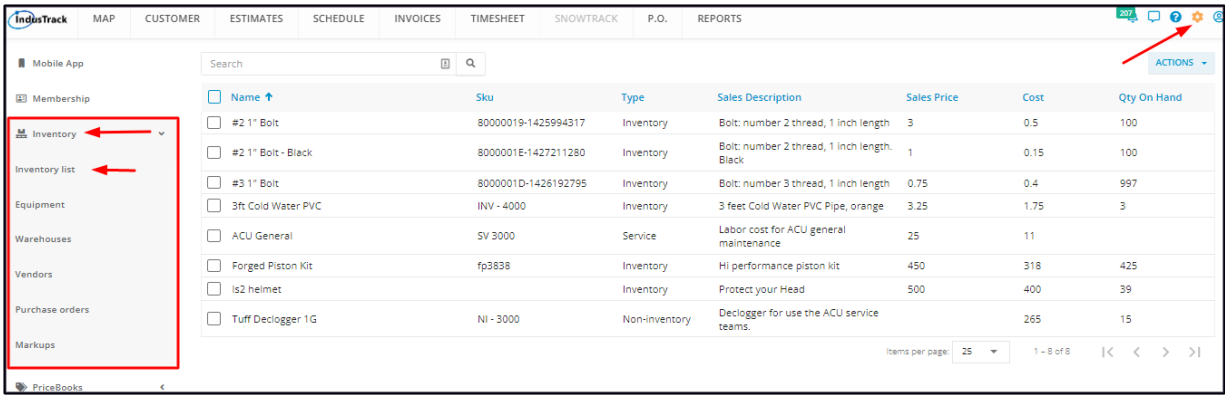


# Services

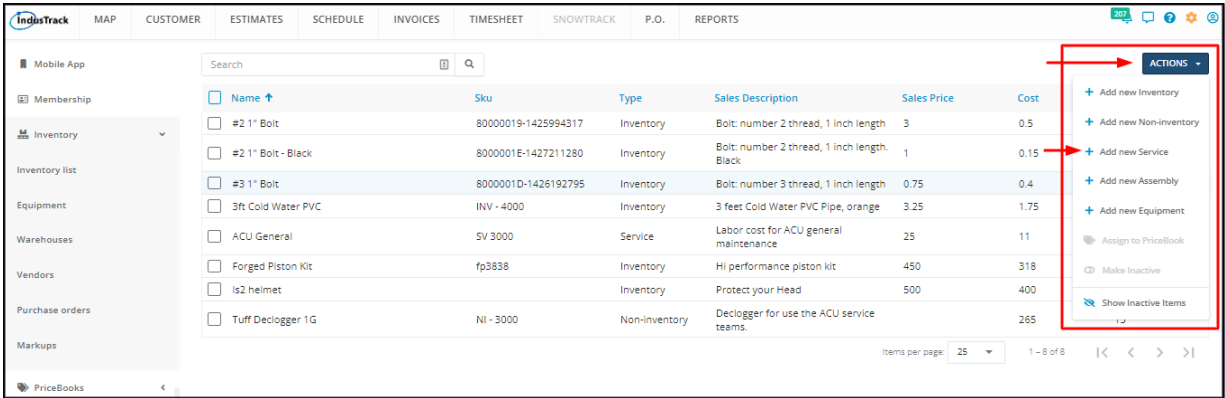
A **service** is a utility/system/resource that you provide/sell to your customers such as maintenance and engineering work, transportation, repairs and others.

## Set-Up a Service

To add and manage your services, go to **Settings > Inventory > Inventory List**.



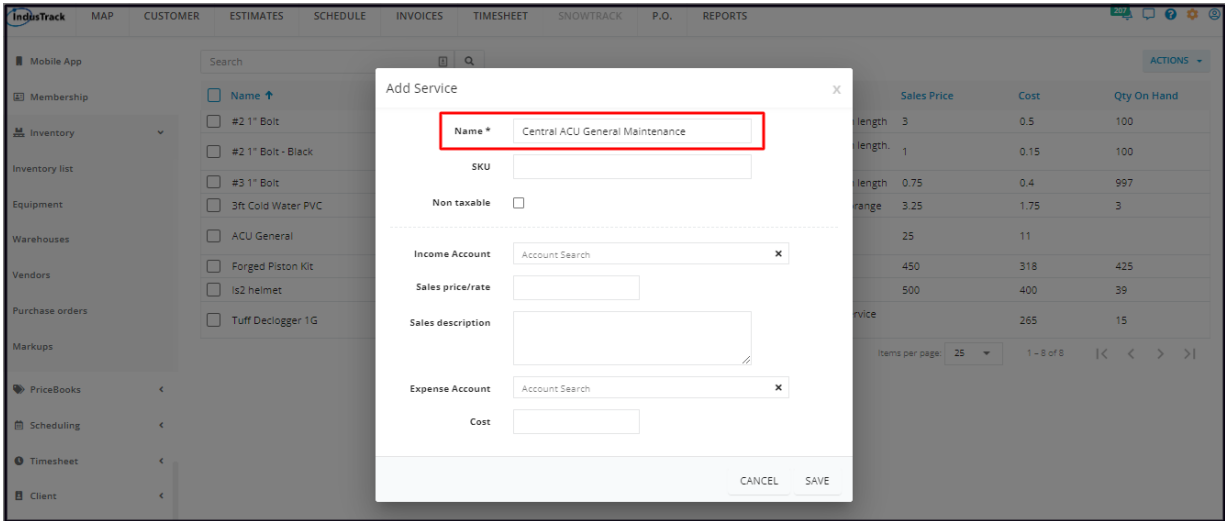
Click on the **Actions** button and select **+ Add New Service**.



Fill in the item details on the **Add Service** window. Fields with (\*) are required.

### Name\*

- Key in the Service name.



### SKU

- Key in the service's assigned code.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☐

Income Account Account Search

Sales price/rate

Sales description

Expense Account Account Search

Cost

CANCEL SAVE

	Sales Price	Cost	Qty On Hand
length 3	0.5	100	
length 1	0.15	100	
length 0.75	0.4	997	
range 3.25	1.75	3	
25	11		
450	318	425	
500	400	39	
price	265	15	

## Non taxable

- If the service is not taxable, tick the checkbox. But if it is, leave the checkbox empty.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☒

Income Account Account Search

Sales price/rate

Sales description

Expense Account Account Search

Cost

CANCEL SAVE

	Sales Price	Cost	Qty On Hand
length 3	0.5	100	
length 1	0.15	100	
length 0.75	0.4	997	
range 3.25	1.75	3	
25	11		
450	318	425	
500	400	39	
price	265	15	

## Income Account

- Select the corresponding income statement account from the dropdown list.
  - Scroll down the list to find the correct account name. OR
  - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☐

Income Account Account Search

Sales price/rate

Sales description

Expense Account

Cost

CANCEL SAVE

	Sales Price	Cost	Qty On Hand
length 3	0.5	100	
length 1	0.15	100	
length 0.75	0.4	997	
range 3.25	1.75	3	
25	11		
450	318	425	
500	400	39	
price	265	15	

## Sales price/rate

- Key in the selling price of the service. This is the price that will be quoted to the customer.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☐

Income Account Construction Income

**Sales price/rate 135.00**

Sales description

Expense Account Account Search

Cost

CANCEL SAVE

## Sales Description

- Key in a short description of the service.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☐

Income Account Construction Income

Sales price/rate 135.00

**Sales description General Maintenance service of central airconditioning units.**

Expense Account Account Search

Cost

CANCEL SAVE

## Expense Account

- Select the corresponding expense account from the dropdown list.
  - Scroll down the list to find the correct account name. OR
  - Key in the account name on the search field to quickly find the correct one.
- If the account name is not on the list, key in on the field. This will be added to the list when the item is saved.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☐

Income Account Construction Income

Sales price/rate

Sales description

**Expense Account**

Cost

CANCEL SAVE

Account Search

## Cost

- Key in the corresponding total cost incurred in the provision of the service.

**Add Service**

Name \* Central ACU General Maintenance

SKU SV 5000

Non taxable ☐

Income Account Construction Income

Sales price/rate 135.00

Sales description General Maintenance service of central airconditioning units.

Expense Account Other Construction Costs

**Cost 65.00**

CANCEL SAVE

**Save** the new service. This will be added to the Inventory List.

Name	Sku	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100
#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<b>Central ACU General Maintenance</b>	<b>SV 5000</b>	<b>Service</b>	<b>General Maintenance service of central airconditioning units.</b>	<b>135</b>	<b>65</b>	
Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
Is2 helmet		Inventory	Protect your Head	500	400	39
Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

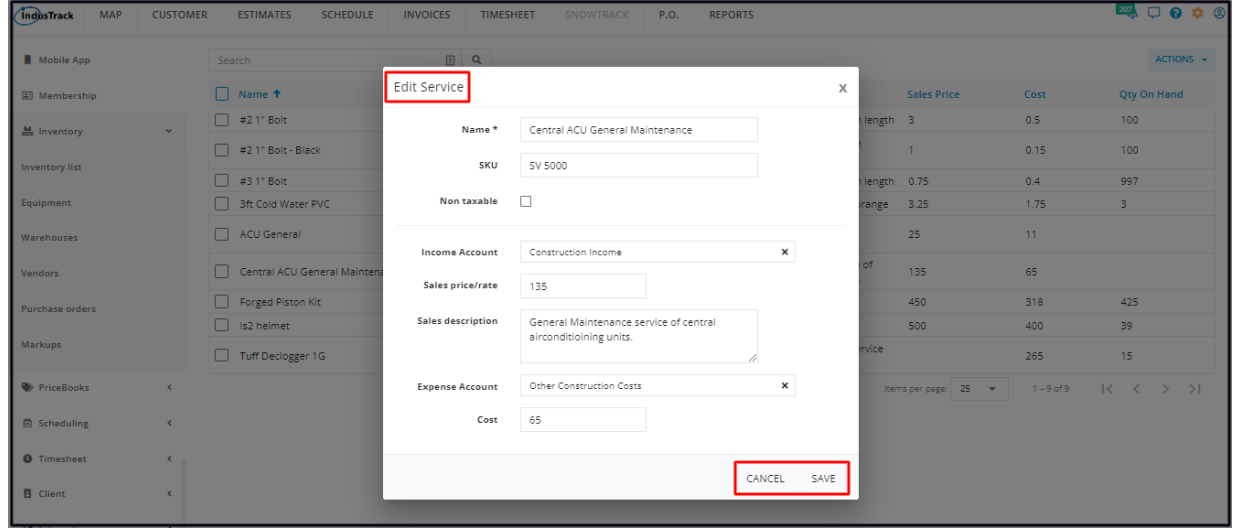
## Update the Details of a Service

Find the service to be updated from the list. Click on the item and the record will open in edit mode.

Name	Sku	Type	Sales Description	Sales Price	Cost	Qty On Hand
#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100
#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<b>Central ACU General Maintenance</b>	<b>SV 5000</b>	<b>Service</b>	<b>General Maintenance service of central airconditioning units.</b>	<b>135</b>	<b>65</b>	
Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
Is2 helmet		Inventory	Protect your Head	500	400	39
Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

**Edit/Update** as may be needed. Once done, **Save** the changes.

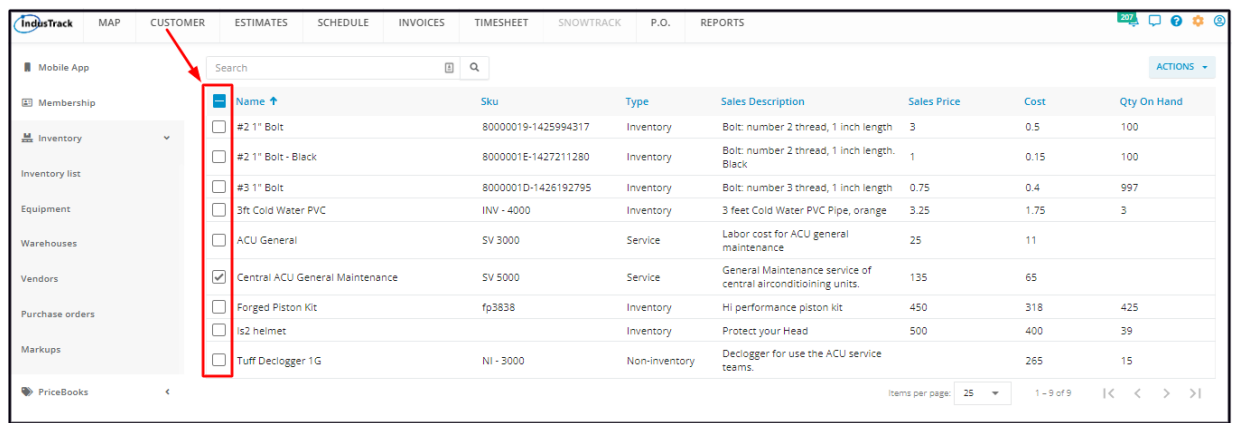
- Inactive services are not editable. These will have to be reactivated first.



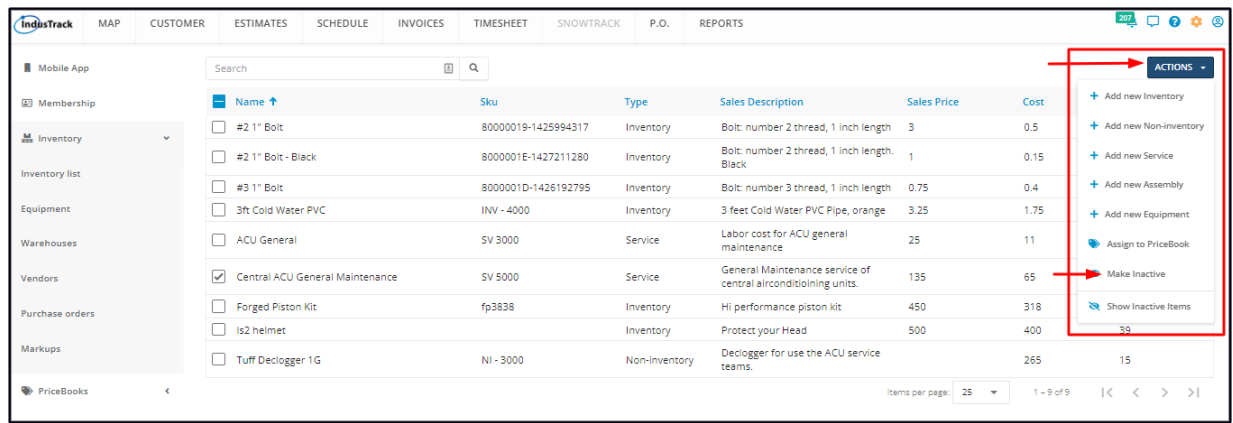
## Deactivate a Service

Deactivate a service if this will no longer be offered or performed. This is an option to take instead of deleting the service which could cause errors.

Find the service to be deactivated from the list and tick the checkbox to its left.



Click the **Actions** button and select **Make Inactive**.



- To deactivate multiple services, tick the checkboxes to the left of all. If all items on the list will be deactivated, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory. And then go to the **Actions** button and select **Make Inactive**.

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Name ↑

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#2 1" Bolt

☒

#2 1" Bolt - Black

☒

#3 1" Bolt

☒

3ft Cold Water PVC

☒

ACU General

☒

Central ACU General Maintenance

☒

Forged Piston Kit

☒

Is2 helmet

☒

Tuff Declogger 1G

SKU

80000019-1425994317

8000001E-1427211280

8000001D-1426192795

INV - 4000

SV 3000

SV 5000

fp3838

NI - 3000

Type

Inventory

Inventory

Inventory

Inventory

Service

Service

Inventory

Inventory

Non-inventory

Sales Description

Bolt: number 2 thread, 1 inch length

Bolt: number 2 thread, 1 inch length. Black

Bolt: number 3 thread, 1 inch length

3 feet Cold Water PVC Pipe, orange

Labor cost for ACU general maintenance

General Maintenance service of central airconditioning units.

Hi performance piston kit

Protect your Head

Declogger for use the ACU service teams.

Sales Price

3

1

0.75

3.25

25

135

450

500

Cost

0.5

0.15

0.4

1.75

11

65

318

400

265

Qty On Hand

100

100

997

3

425

39

15

Items per page: 25

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A warning window will come up. Click the **Yes** button to continue with the deactivation and **Cancel** to abandon the action.

### Confirmation

Are you sure you want to Make Inactive the record(s)?

CANCEL
YES

The service will be removed from the **Active List** and moved to the **Inactive List**.

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ACTIONS

<input type="checkbox"/>	Name ↑	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/>	#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
<input type="checkbox"/>	#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100
<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
<input type="checkbox"/>	ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input type="checkbox"/>	Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
<input type="checkbox"/>	Is2 helmet		Inventory	Protect your Head	500	400	39
<input type="checkbox"/>	Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

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<input type="checkbox"/>	Name ↑	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/>	Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65	

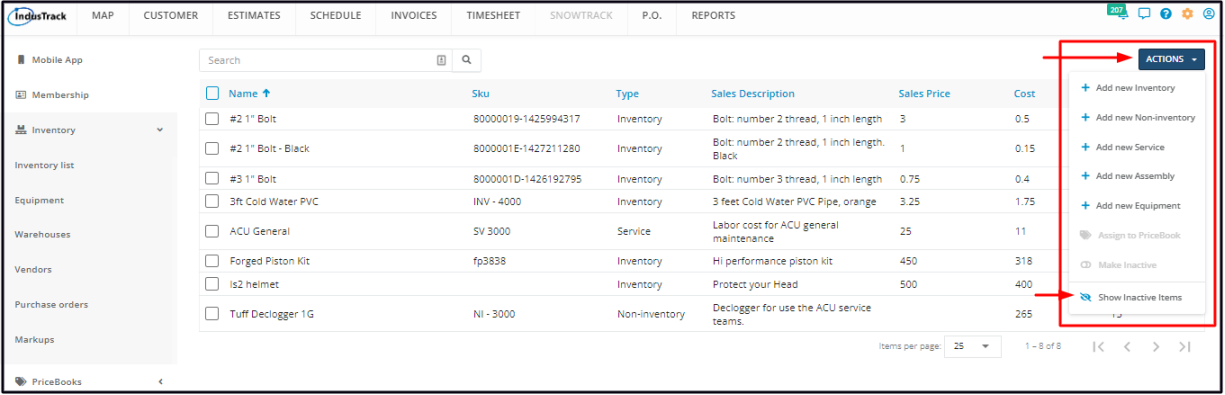
Items per page: 25

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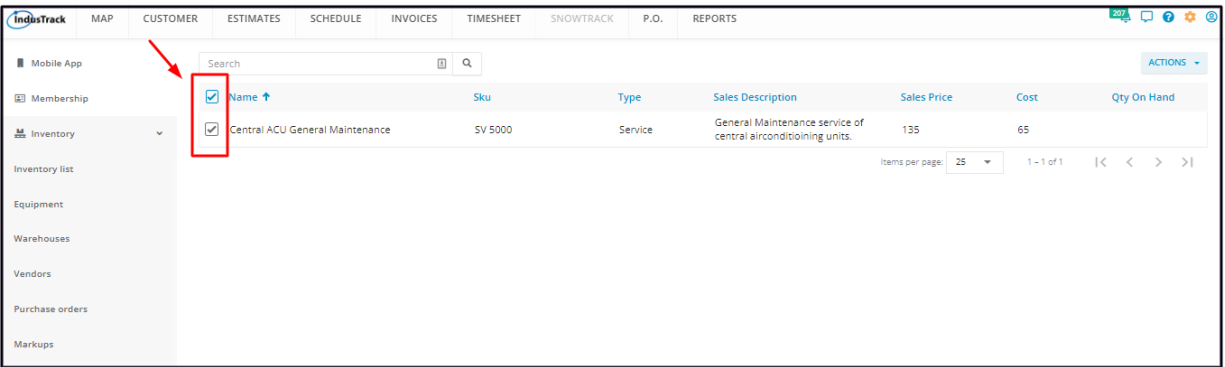
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## Reactivate a Deactivated Service

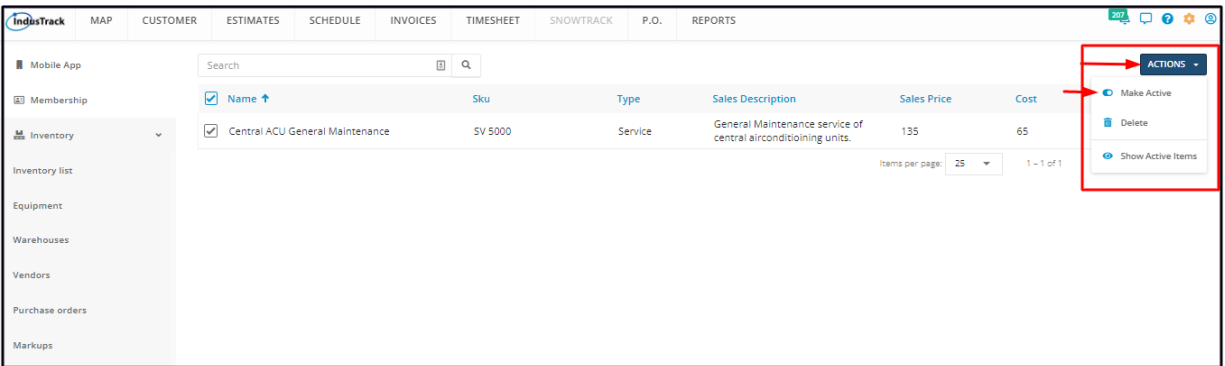
Go to the **Inactive Inventory List**.



Find the service to be reactivated from the list and tick the checkbox to its left.

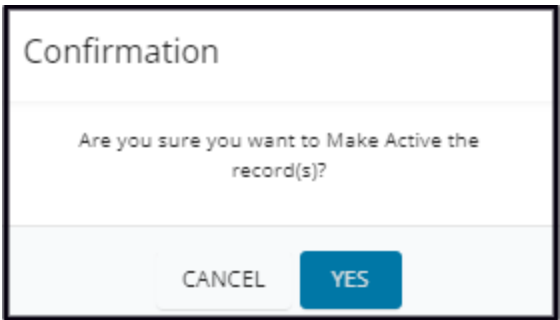


Click the **Actions** button and select **Make Active**.



- To reactivate multiple services, tick the checkboxes to the left of all. If all items on the list will be reactivated, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory.
- Go to the **Actions** button and select **Make Active**.

A warning window will come up. Click the **Yes** button to continue with the reactivation and **Cancel** to abandon the action.



The item will be removed from the **Inactive List** and moved to the **Active List**.

	Name ↑	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/>	#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	100
<input type="checkbox"/>	#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	100
<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	997
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
<input type="checkbox"/>	ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input type="checkbox"/>	Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65	
<input type="checkbox"/>	Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	425
<input type="checkbox"/>	Is2 helmet		Inventory	Protect your Head	500	400	39
<input type="checkbox"/>	Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

Update the service record as may be needed.

## Delete a Service

Delete a service that is no longer in use or was created in error. It is wise to exercise caution when using this function. Deleting an item may have an effect on other functions, settings or data.

If the item has an active status, **deactivate this first**. An active service can not be deleted.

Move to the **Inactive Inventory** table.

	Name ↑	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/>	#2 1" Bolt	80000019-1425994317	Inventory	Bolt: number 2 thread, 1 inch length	3	0.5	
<input type="checkbox"/>	#2 1" Bolt - Black	8000001E-1427211280	Inventory	Bolt: number 2 thread, 1 inch length. Black	1	0.15	
<input type="checkbox"/>	#3 1" Bolt	8000001D-1426192795	Inventory	Bolt: number 3 thread, 1 inch length	0.75	0.4	
<input type="checkbox"/>	ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input type="checkbox"/>	Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65	
<input type="checkbox"/>	Forged Piston Kit	fp3838	Inventory	Hi performance piston kit	450	318	
<input type="checkbox"/>	Is2 helmet		Inventory	Protect your Head	500	400	
<input type="checkbox"/>	Tuff Declogger 1G	NI - 3000	Non-inventory	Declogger for use the ACU service teams.		265	15

Find the service to be deleted from the list, and tick the checkbox to its left.

- To delete multiple items, tick the checkboxes to the left of all. If all will be deleted, just tick the checkbox of the Name header. Just note that the list includes the other types of inventory.

	Name ↑	SKU	Type	Sales Description	Sales Price	Cost	Qty On Hand
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75	3
<input checked="" type="checkbox"/>	ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11	
<input checked="" type="checkbox"/>	Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65	

Go to the **Actions** button and select **Delete**.



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<input type="checkbox"/>	Name ↑	SKU	Type	Sales Description	Sales Price	Cost
<input type="checkbox"/>	3ft Cold Water PVC	INV - 4000	Inventory	3 feet Cold Water PVC Pipe, orange	3.25	1.75
<input checked="" type="checkbox"/>	ACU General	SV 3000	Service	Labor cost for ACU general maintenance	25	11
<input checked="" type="checkbox"/>	Central ACU General Maintenance	SV 5000	Service	General Maintenance service of central airconditioning units.	135	65

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ACTIONS

- Make Active
- Delete
- Show Active Items

A warning window will come up. Click the **Yes** button to continue with the deletion and **Cancel** to abandon the action.

Confirmation

Are you sure you want to delete the record(s)?

CANCEL

YES

The service will be removed from the Inactive Inventory list.





