

Service Templates

SAVE AS TEMPLATE - Clicking the button will allow the user to save the currently listed Service Items (Saved) as a Template for future use. Templates are unique to each Office and as many can be created as needed to meet the needs of the Office. Templates may optionally save the Vendors selected but do not save the Amounts.

Service Items

SAVEDELETE SELECTED

Templates

RETRIEVE TEMPLATESAVE AS TEMPLATE

Workflow

START WORKFLOWRESEND EMAILCANCEL SERVICEGENERATE PO

Upload Service Item Docs

Payments

GENERATE CHECK(S)PAID WITH CREDIT CARD/CASHVIEW PAYMENTS

PostVoid Blank Check

POSTVOID BLANK CHECK(S)

DBA Invoice

APPROVEREVOKE

File Type: MAERSK A/S - W

+ INSERT ROWCancel changesShow Cancelled Items

	Code	Vendor Name	Use S...	Sub Contract Vendor	Sales A...	Cur	Billing Par...	ProForma...	WF Ac...	WF Status	Local Payment
☐	CUSTOMS TONNAGE TAX (1014)	U.S. CUSTOMS (931)	☐		\$1,115.58	US Dollar					
☐	CUSTOMS USER FEES (1015)	U.S. CUSTOMS (931)	☐		\$468.32	US Dollar					
☐	CUSTOMS APHIS FEE (1016)	U.S. CUSTOMS (931)	☐		\$825.00	US Dollar					
☐	PILOTAGE - IN (1021)	MOBILE BAR PILOTS ASSOC (830)	☐		\$5,223.71	US Dollar					
☐	PILOTAGE - OUT (1022)	MOBILE BAR PILOTS ASSOC (830)	☐		\$5,037.20	US Dollar					
☐	TOWAGE - IN (1031)	SIGNET MARITIME CORPORATION (5623)	☐		\$0.00	US Dollar					
☐	TOWAGE - OUT (1032)	SIGNET MARITIME CORPORATION (5623)	☐		\$0.00	US Dollar					
☐	LINE MOORING (1041)	Prestige Maritime	☐		\$1,000.00	US Dollar					
					\$14,469.81						

1

100 items per page

1 - 11 of 11 items

When the Save as Template button is clicked a Pop Up window is displayed where you may either create a New Template by typing in a New Template Name or overwrite an existing Template by selecting it from the List. You can also optionally choose to save the Vendors.

Template Name

×

Save Vendors☐

Template Name

Template Name

Sel...	Template Name ▲	Created By
☐	Joey Test Template	Joey Rudnick

1

100 items per page

1 - 1 of 1 items

CANCEL

SUBMIT

RETRIEVE TEMPLATE - Clicking the Retrieve Template will display a list of all the Templates for the Office. Click on View then Confirm to retrieve the items into the Service list.

After retrieving the items into the Service List click Service Items Save to Save the Items and edit the Line Item

Details.