Using Additional Cost Charges

When you get charged an added shipping fee or other charge from a 3rd party supplier, you'll need to be able to track and match it to that supplier's invoice. Creating Additional Costs/Charges will help you to do this. This course describes the process to add Additional Costs/Charges to both Sales Orders and Purchase Orders. Let's dive in.

Sometimes you need to ship products to your customer using 3rd party freight or incur 3rd party fees to get the product to your location. The cost of the shipping will need to be passed onto the customer to retain your expected profit margin and will then need to be matched to the invoice that the supplier sends. Begin by locating and opening the saved sales order. Select the Additional Costs/Charges tab.

The top half of your screen displays any current Additional Costs/Charges, while the bottom half displays the items being sold. Select the Add button. Here you can view all of the defined additional charges. Type the description of the one you are looking for, or press Go to view them all. The system displays the description, supplier, currency, and cost value of each option. Press the right scroll arrow to view more details. For this order, we'll select Container Charge.

BisTrack adds the Additional Charge to the list. If the Additional Cost/Charge has not been setup with a default supplier, select one. In this example, we were charged $225.00 to ship the items to our location in a container.

As this is a sales transaction, the cost of the shipping is prorated across all of the lines on the order. This means that if a customer were to cancel one of the items, the cost of the remaining item would go up in order to cover the full shipping cost. To pass the cost on to the customer, make sure that the amount is entered in the Charge Value field. This spreads the amount of the charge across the selling prices for all lines on the sales order. Select Save and Close to finish. Complete the order as you normally would.

You may order items from a supplier and find that they were shipped to you by a 3rd party. Adding Additional Cost/Charges allows you to add the shipping amount to the same purchase order. In this example, you are purchasing inventory worth $4,600. You'll get a separate invoice from a 3rd party freight company. Select the Additional Costs tab so we can include this charge.

Select Add to find the appropriate Additional Cost/Charge. Type in the name of the charge you are looking for or press Go to view them all. We'll select 3rd Party Delivery Charge, and then press OK.

You now have the opportunity to add the Supplier and Value for the charge if it's not already defined in the selected Additional Cost/Charge. Start by selecting the ellipses or three dots in the Supplier field. In the Find a Supplier window, type the name of the company identified in your invoice and press Go. Select the vendor and press OK.

In the Value box, enter the cost of the charge. Select the Value Type dropdown menu and determine if the charge is a fixed amount, a percentage of the order cost, or based on weight or volume. The cost is added to your purchase order and is identified as an Additional Cost. You may now complete the order.

You can easily view a record of these charges in Stock Receipts. Select the receipt number related to the order. Here you can see the cost of the item as well as the specific charge for the shipping. If the Additional Cost/Charge was not added to the Purchase Order ahead of time, you can add or update it on the stock receipt.

You've seen how easy it is to add an Additional Cost/Charge to both sales and purchase orders. The next time you need to ship an order to a customer or get an invoice from a 3rd party service, you'll know what to do. Your records will be correct and your margins will be accurate.

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