Added Value Operations Overview

Lumber and building material dealers often provide extra services associated with the products they sell. This may include lumber treating, custom millwork, or a variety of labor related activities. In BisTrack, these are Added Value Operations, or AVOs. This course provides an explanation of AVOs, how you can use them, and how to create one.

So what is an AVO? An AVO, or Added Value Operation, is a procedure or service done to a product. You add them in sales or work order documents. AVOs can incorporate a process where the fee is charged according to the product quantity being sold.

For example, a roof installation fee could be based on the number of shingles sold. There are several options associated with AVOs. On sales documents, they can be excluded or included in the unit selling price of the product. Their total price can also be shown on separate lines of the printed sales order document.

AVOs can be completed as in-house operation or performed by a third-party supplier. When being done by a supplier, the system can automatically generate the Overhead Purchase Order. You can apply the same AVO to multiple lines in one entry.

Products can also be assigned more than one AVO process. This one product is having two millwork procedures performed. On sales documents, a special notation is included on the product line where an AVO has been added.

Before you are able to include an AVO in a sales document, it must be added in System Manager. From the Products view, select Added Value Operations. Any AVOs previously added are shown in the results area of the window. From the right-click menu, select New. Enter a Name for the AVO. This is used to search for the operation when adding it to a sales do cument.

Enable the Internal operation checkbox if all of the options being added for the AVO will be done in-house. When you enable the Requires confirmation checkbox, the staff responsible for completing the AVO must indicate when it is

done. This does add an extra step to the workflow process therefore; you should only select this when it is important to have someone confirm that the work is complete.

When an AVO has more than one Option, indicate if multiple ones can be selected for the same product. For example, there are different types of pressure treating that can be done so each would be an individual AVO Option. When applying the AVO, you would not want to have multiple treatments applied to the same lumber product so in this case, you would not enable this checkbox.

To create a new Option, click the Add button. Enter a descriptive Name. When the Option is performed by a third-party, select the default Supplier. You can also indicate if the system should Create a Purchase Order when this option is added to a Sales Order. Next, enter the Cost and Selling price. Set the cost and sell price to 0.00 if the user is to enter an amount when adding to a transaction. Set the UOM to match the type of product that this AVO option will be used with. Set the Branch if this Option should be used by a specific branch only.

Open the Analysis tab to set the sales analysis and general ledger codes as needed. Once finished, select the Add button. The Option is shown. Continue to Add more Options to this AVO as needed.

You can use the Description tab to enter further explanation for the AVO. Text entered here is shown alongside the AVO name in System Manager. The final tab determines the product types to which you can apply this AVO. Enable the check box beside the applicable types. The system warns users if they try to apply this AVO with a product type not selected.

Once you have added all the Options you want and selected the Allowable Product Types, click the Add button. The system clears the fields, making them ready to enter another AVO. Close the window if finished. BisTrack shows the new AVO in the Results area.

Given the variety of AVO settings available, let's review another sample. This is an Added Value Operation for Millwork processes. There are several Options added.

Since we may want to perform more than one procedure to the same product, we enable the checkbox to allow selection of multiple options. During sales entry, you can add as many of these Options from the Millwork/Reman AVO to a product as needed. This AVO has also been flagged as an Internal operation.

Let's review its properties. The option to Create a Purchase Order is not accessible for AVOs flagged as Internal Operations. When you have a mixture of options that can be performed either internally or using a third-party supplier, leave the Internal operation check box unchecked. When you set the Properties for the Option, pre-select the Supplier and enable the check box to Create a Purchase order. This saves you from having to select the Supplier during the sales order completion.

AVOs are essential for those providing supplementary services related to products being sold. You should now have a good understanding of what an Added Value Operation is, know how to add one within BisTrack and be familiar with the various options available for customization.

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