

Using Added Value Operations on Sale Documents

Added Value Operations, or AVOs, are applied to a product when there is a process or enhancement being added. They can be used on both sales and works orders. This training course is specific to AVOs for sales orders. You will learn how to add an AVO to a product line using a variety of choices such as including or excluding in the sell price, adding to multiple lines, and adding an AVO performed by third party suppliers.

Then we'll view a purchase order generated from an AVO. We'll begin by adding an AVO and having the charge included in the sell price. A new sales order has been started. For the first product line, we'll apply an installation fee.

One method to access the AVO option is via Order Line Properties. Select the product line and double-click to open it. Take note of the Selling price for the item and then press F5 or click the AVOs tab. You can enter the partial name of the AVO in the Operation field or click on the ellipsis to search from the list.

Select the AVO to use. Within each Operation there can be any number of options. To see those available, click on the ellipsis. Pick an AVO option from the list. Our AVO will add a fee for each bundle of roofing product that is scheduled to be installed. The Sell Price entered when the AVO was created is shown. You can change this if needed.

The UOM, a bundle, matches the type of product we are selling. The Total Sell and Cost price are calculated using the quantity from the sales order. Pressing Enter on the Sell Price adds the AVO to the product. You can add more AVOs for this product as needed. The option to show the price of the AVO in the unit selling price is selected.

Open the General tab to view the effects of the AVO. The unit selling price has been changed based on the option just added. Before the AVO, it was \$17.60. A message beside the UOM advises the Selling Price is Including AVOs. The Total price is calculated using the updated Selling price. Press the F12 key or click OK to close the Order Line Properties.

The product line is shown with an icon to indicate an AVO has been added. The unit Sell Price includes the AVO, and in this example shows an increase of \$25 per bundle.

AVOs can be added to multiple products on the sales order at the same time. The Shift and click keys are used to select three consecutive product lines. Another method for accessing AVOs is through Other Options. Press F11 or click the button. From the menu, pick Added Value Operations.

A window opens to select the AVO. Multiple lines is displayed beside Product and Quantity. Click the drop down to see the list of AVO Names. Scroll through the list to find the one desired. All Options available for the AVO selected are shown with their Name, Sell Price and UOM.

A checkbox is used to select the Option. You can determine whether or not to Show price of AVOs in the unit selling price. All lines now indicate an AVO has been applied. To view the details for a specific line, open the Properties and then the General tab.

This time we chose to not show the AVO in the unit Selling price. The Total price, however, has the AVO included. You can still change the display to include the AVO in the Selling price by opening the AVO tab. Even though the AVO was added to multiple lines at one time, individual entries were created.

Click the box to Show price of AVOs in unit selling price. Re-open the General tab. The Selling price is now shown at the AVO included value. Click OK to close the line.

AVOs can be completed by a third-party supplier. With a product selected, press Ctrl and F7. This is a third way to access the AVO option. The Add AVO to Order Lines window is shown with the Product and Quantity being sold.

Open the drop down to select an AVO. When a third-party supplier is used, their name is shown in parenthesis beside the Option. Enable the check box beside the desired Option, then click OK to complete. The line is updated to include the AVO.

Some AVOs where a third-party supplier is used, such as a sub-contractor for labor, will have the total price and cost set each time. To add this type of AVO you need to use the Order Line Properties method. Select the product line and double-click to open it. Press F5 or click the AVOs tab.

Select the Operation and Option to use. Only the Total Price and Cost will be entered so press Tab to by-pass the Sell Price field. The UOM for this type of AVO is 1. Enter the Total Price and then press Tab to proceed to the next field to enter the Total Cost.

This is the amount you expect to be charged by the third-party supplier. Press Enter to complete the line. If you press Enter before finishing the line, you can still make changes. Simply click on the field to edit and then re-enter the data. Click OK to save the AVO and close the Order Line Properties window. The line is updated to include the AVO.

When the details of the order are finalized Complete it. Generate purchase orders for external AVOs is a task for completion. Click the Finish button. Both a sales order and PO are created.

Depending on your system options settings, the generate PO may need to be approved. Purchase orders generated from an AVO are an Overhead type.

From the Find Work view, filter the list to Purchase Orders for Approval where the Order Type is Overhead. The Sales Order number where the PO originated from is noted in the Our Ref column. To open the PO, select it then double-click.

The Supplier for the Overhead PO comes from the AVO setting. Included on the Lines tab are the details of the AVO. First is a Text line describing the quantity and product the AVO applies to. Below that is a Manual Order Line with the details of the AVO name and option being performed, the cost and related GL code.

It is possible to make changes to the information, if needed. If changes are made to the Cost price, you will also need to change it on the sales order. You can Save the order or Approve it. Then proceed through prompts shown.

The PO's status is changed to Not Received. Once the AVO procedure is complete and the finished product is available, this PO will need to be received like a regular Overhead PO. To acknowledge completion of the added value service, use Find Work with the Look for set to Purchase Orders for Receipt (Overhead).

Added Value Operations included in an order change the product's total price, cost, and the amount of the sale. You should now be able to add an AVO to a sales document and choose to show the fee in the unit selling price. Adding AVOs to multiple products at the same time, the relationship with third party suppliers and the PO generation process were also introduced.

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