

Additional Fees

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Overview:

There is a feature in Order Time called Additional Fees. This article is designed to show you how to utilize them.

Activating:

The first thing you will need to do is to activate the Additional Fees. To do this you will need to check the box in your company preferences.

Admin > Company Preferences > Sales > Advanced > Check the box for "Enable Charging Additional Fees on Orders"

The screenshot shows the 'Company Preferences' interface. At the top, there is a breadcrumb trail: 'Admin > Company Preferences'. Below this, the 'Company Preferences' section is expanded, showing a list of sections on the left: General, Activities, Doc #s, Items, Inventory, Sales, Shipping, Payments, Purchasing, Receiving, Production, Lot / Serial #s, and Mobile. The 'Sales' section is highlighted with a red box. To the right, the 'Advanced' tab is selected and highlighted with a red box. Under the 'Sales - Advanced' section, there is a list of checkboxes. The checkbox for 'Enable charging additional fees on orders' is checked and highlighted with a red box. Other checkboxes include 'Limit items for selling to items that have an item # listed for the current customer', 'Use last customer price (ignores pricing levels)', 'When adding items to sales documents show all price level pricing, including price levels assigned to other customers.', 'Move attachments from quote to sales order on conversion.', 'Apply price levels to Kit selections.', 'Require Ship Method.', 'Show kit selections on sales orders and quotes.', 'Calculate tax rates based on zip codes instead of Item Sales Tax', 'Round sales tax to the nearest penny. Uncheck to round down.', 'When printing a form template with styles, show the variants as rows instead of in matrix format.', 'Enable creating a transfer from a sales order.', and 'Transferring from a sales order is used for consignment.'. Below these checkboxes is a 'Default Location' dropdown menu and three more checkboxes: 'Enable Location lookup based on Shipping Regions', 'Highlight line items with inventory deficiencies', and 'Enable charging additional fees on orders'.

Next you will need to create a new Item Group called Additional Fees. It is important to make sure you have the Item Type set to "Other Charge" and the box marked for "Additional Fees"

Admin > Profile Lists > Item Group

Admin > Profile Lists > Item Group

Item Group

Active Status
 Active Inactive Both

Records +

- Additional Fees +
- Assembly Group +
- Jobs Group +
- Kits Group +
- Non-inv Group +
- Other Charge Group +
- Parts Group +
- Services Group +

Total Records: 8

Additional Fees

Name: Additional Fees

Short Name: FEES

Item Type: Other charge

Is default:

Active:

Default Accounts

Income Account: Sales [Income]

Expense Account: Materials [Expense]

UOM Set: EA-2

Is Sold:

Is Used:

Is Purchased:

Item Cost Type: Cost As Entered

Additional Fees:

Now Additional Fees has been activated! Utilization is next.

Using Additional Fees:

Now that Additional Fees have been activated lets use one!

First you will need to create a new item. You can call the item whatever you want but you must choose the Item Group "Additional Fees". When setting up the item the Price is actually a percentage. In the below example you will see I called my item "3% Restocking Fee" and set the price to 3 which is really 3%.

Home > Items > Item

Item - 3% Restocking Fee

Save Re

General

Group: Additional Fees

Name: 3% Restocking Fee

UOM Set: EA-2

Other

Active:

General Purchasing Notes Custom

Description

Price: 3.00

Income Account: Sales [Income]

Tax Code:

Class:

Expense Account: Materials [Expense]

On a Sales Order you can now add this Additional Fee. Click on the Additional Fee hyperlink in the summary of the Sales Order.

Sales > Sales Orders > Sale Order

Sales Order - 39 edit Create PDF Export Status: Processing

General	Bill Address	Ship Address	Summary Revision: 1
No. 39 Customer Hansen Training Change Date 1/11/2021 Promise Date 1/13/2021 Customer PO Contact	HANSEN TRAINING 333 MEADOW ST STUART, FL 34996 UNITED STATES	HANSEN TRAINING 4006 JACK JAMES RD STUART, FL 34997 UNITED STATES	Subtotal 200.00 Ship Amount 0.00 Discount -0.00 Additional Fee 0.00 Taxes 0.00 Total Amount 200.00 Paid Amount -0.00 Balance 200.00

Items | Details | Memo & Instructions | Custom | Payments | Ship Docs | Dependency | Attachments | Open Activities | Activity History

Name/Number Search Item

Which will give you this box.

Sales > Sales Orders > Sale Order

Sales Order - 39 edit Create PDF Export Status: Processing

General	Bill Address	Ship Address	Summary Revision: 1
No. 39 Customer Hansen Training Change Date 1/11/2021 Promise Date 1/13/2021 Customer PO Contact	HANSEN TRAINING 333 MEADOW ST STUART, FL 34996 UNITED STATES	HANSEN TRAINING 4006 JACK JAMES RD STUART, FL 34997 UNITED STATES	Subtotal 200.00 Ship Amount 0.00 Discount -0.00 Additional Fee 0.00 Taxes 0.00 Total Amount 200.00 Paid Amount -0.00 Balance 200.00

Additional Fee

Additional Fee

Additional Fee

Sales Tax

Additional Fee

Additional Fee Rate

Save Cancel

CUSTOMER ORDER NO	LINE NO.	ITEM	MARGIN %	CLEARED	STD. COST	STD. PRICE	ID	DISCOUNT %	ACTIONS
	1	SEL-TRN 0012	40.0 %	<input type="radio"/>	120.00	200.00	114	0 %	<input type="button" value="🔍"/>

Choose your Additional Fee from the Drop down menu.

Additional Fee

Additional Fee

Additional Fee

Sales Tax

Additional Fee

Save Cancel

You will see the fee rate (price from the item) and the Additional fee which equals 6. 3% of my subtotal of \$200 is \$6.

Status Processing ▼

Summary Revision : 1	
Subtotal	200.00
Ship Amount	0.00
Discount	-0.00
3% Restocking Fee (3.00 %)	6.00 Non
Taxes	0.00
Total Amount	206.00
Paid Amount	-0.00
Balance	206.00

You can also add the Additional Fee to a customer default if you wish. This would carry the Additional Fee to all Sales Orders going forward. You may need to add the Additional Fee field to the Customer Page layout but it is available.

Admin > Page Layouts > Page Layout

Edit Editor Page for Customer Revert

Properties Widgets

- A/R Account
- Account #
- Active
- Additional Fee
- Allow Ship Partial
- Bill Address Alt. Contact
- Bill Address Alt. Phone
- Bill Address Care of
- Bill Address City
- Bill Address Contact
- Bill Address Copy changes to customer
- Bill Address Country
- Bill Address Email
- Bill Address Fax
- Bill Address Floor/Suite
- Bill Address Name/Company

General	Other	Primary Contact
Name <input type="text" value="Sample Name"/>	Price Level <input type="text" value=""/>	Mr./Ms./... <input type="text" value="Sample Mr./Ms./..."/>
Company <input type="text" value="Sample Company"/>	Sub of <input type="text" value="Sample Sub of"/>	First Name <input type="text" value="Sample First Name"/>
Active <input type="checkbox"/>		M.I. <input type="text" value="Sample M.I."/>
		Last Name <input type="text" value="Sample Last Name"/>

Address
Defaults
Payment
Notes
Custom
+

Type <input type="text" value=""/>	Invoice Send Method <input type="text" value=""/>
Ship Method <input type="text" value=""/>	Resell Number <input type="text" value="Sample Resell Number"/>
Terms <input type="text" value=""/>	Tax Code <input type="text" value=""/>
Sales Rep <input type="text" value=""/>	Tax Item <input type="text" value=""/>
Class <input type="text" value=""/>	Additional Fee <input type="text" value=""/>
FOB <input type="text" value=""/>	
Discount <input type="text" value=""/>	