

Units of Measure (4.0.10.104)

Units of Measure (UOM) allows you to buy and sell products represented in different units such as boxes or packs.

It also allows you to control the valid decimal places for quantities on a per Product basis. For example you can set Decimals for Labour recorded in 15 minute segments as Hours with 2 Decimals. You can also set Decimals for goods you only buy and\or sell in whole quantities with 0 Decimal places, eg to prevent you selling say half a Wardrobe.

Products have a Base UOM which is the unit of measure that stock quantities are ultimately stored in and reported on, ie the unit the Product is represented in. They can then have Other UOMs they buy and sell in.

Each UOM code has a Multiplier which is how many of the Base Unit are in the UOM code. The Base UOM code will always have a Multiplier of 1.

If you are using UOM for Decimal control – you only need a Base UOM.

In the example below a Box UOM contains 6 EA, an Inner 24 EA and an outer 48 EA.

The screenshot shows the 'IC Product Maintenance' window for product 'P30MMRRK - 30mm Rimu 12Round Knob'. The 'UOM' tab is selected. The 'Base UOM' is listed as 'EA' with a multiplier of '1.000'. Below it, 'Other UOM' is listed with three entries: 'BOX' (Multiplier 6), 'INNER' (Multiplier 24), and 'OUTER' (Multiplier 48). At the bottom, 'Default Sale UOM' is set to 'BOX' and 'Default Purchase UOM' is set to 'OUTER'. The status bar at the bottom indicates the product was created by ACCREDO on 28/01/2015 7:35:09 a.m. and modified by ACCREDO on 29/01/2015 11:02:25 a.m.

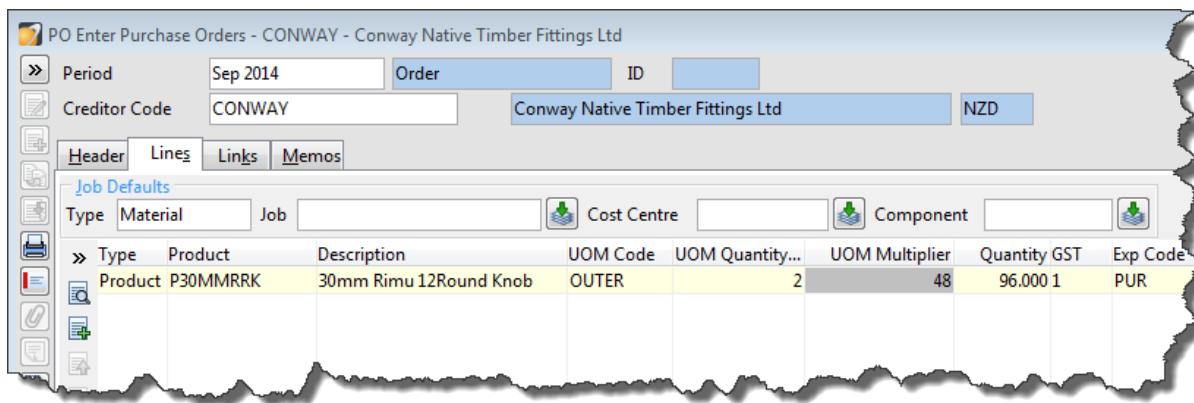
UOM Type	Code	Multiplier	UOM Description	UOM Group
Base UOM	EA	1.000		COUNT
Other UOM	BOX	6		COUNT
	INNER	24		COUNT
	OUTER	48		COUNT

UOM affects all Modules that use Quantities, so are used in Purchase Orders, Shipments, Sales Orders, Invoices, Stocktakes, Job batches and in Special Pricing Quantity Breaks.

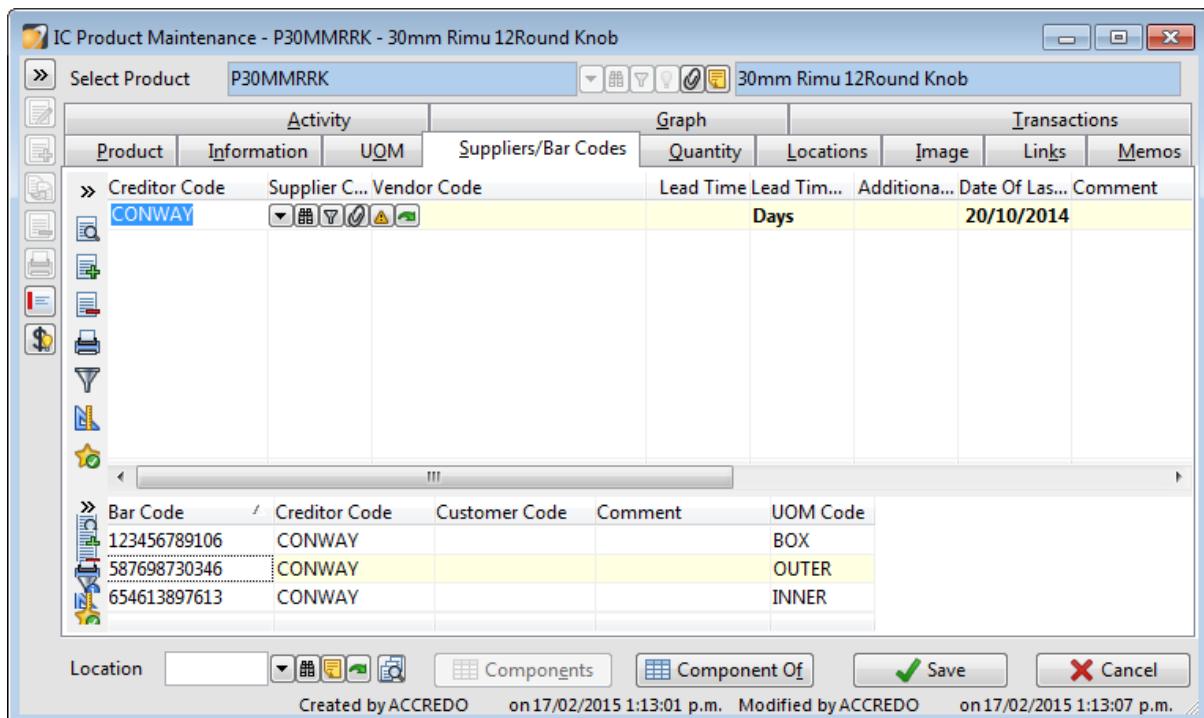
When UOM is active, data entry screens have UOM Quantity fields, a UOM Code and Multiplier field and UOM Cost and Sell fields.

Everywhere a UOM code is selected, its Multiplier is fetched and the base Quantity is calculated. The UOM Quantity x the UOM Multiplier = (base) Quantity.

In the Purchase Order example below you can see that 2 Outers, have been ordered, and an Outer has a multiplier of 48, therefore $2 \times 48 =$ the base Quantity of 96



You can store different barcodes for different units of measure on a per product basis. These can be scanned and printed out on Invoices, Packing Slips, and Purchase Orders.

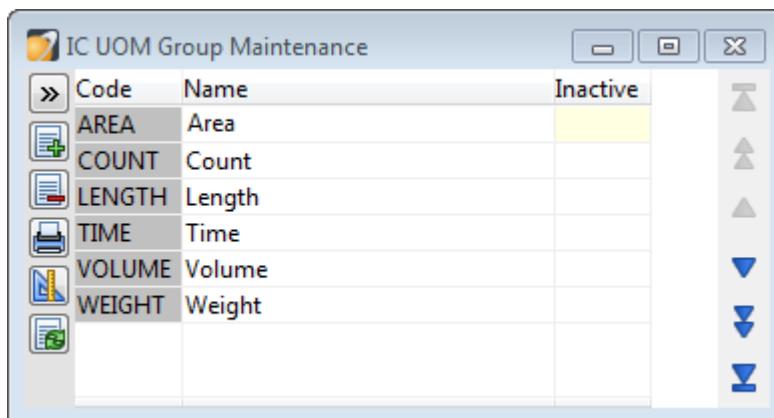


UOM is optional and is not activated by default, so if you have workarounds for UOM not being available in the past, there is nothing to stop you continuing with the way you have been operating.

If you decide you want to use UOM, you can setup your UOM codes, assign them to Products, and setup any UOM Special Price Qty breaks before you 'go live'.

UOM typically fall into related groups of units. Accredo provides a list of commonly used UOM Groups you can use when setting up your Units of Measure. You can also add your own groups. Using Groups is Optional. If you are just using UOM so you can have decimals set, then all your UOM's would be Base so they would not belong to a Group.

Setup > Inventory Control > UOM Groups



IC UOM Group Maintenance		
	Code	Name
	AREA	Area
	COUNT	Count
	LENGTH	Length
	TIME	Time
	VOLUME	Volume
	WEIGHT	Weight

Setting up Units of Measure

1. Add UOM Codes

Setup > IC > Units Of Measure

Press Edit and change the UOM Status to 'Pending' this will allow you to enter the UOM codes and then assign them to Products.

If you want all your Products to have a Base UOM, tick UOM Required, or leave blank if you only want to use UOM for some Products.

Add your UOM codes. You may just wish to add Base UOM codes, then add Other UOM codes as you come across them.

IC Units of Measure Maintenance

UOM Status			UOM Required								
	Code	Name	Description	Group Co...	Decimals	Multiplier	Fixed Multipl...	Add'l Wei...	Add'l Vol...	Base	Inactive
	BOTTLE	bottle	Bottle	BOTTLE	0	1.000	✓			<input checked="" type="checkbox"/>	
	CASE	case	12 Bottles	BOTTLE	0	12.000	✓			<input checked="" type="checkbox"/>	
	BOX	box	Box	COUNT	0					<input checked="" type="checkbox"/>	
	EA	each	Each	COUNT	0	1.000	✓			<input checked="" type="checkbox"/>	
	INNER	inner	Inner	COUNT	0					<input checked="" type="checkbox"/>	
	LAYER	layer	1 layer in a Pallet	COUNT	0					<input checked="" type="checkbox"/>	
	OUTER	outer	Outer	COUNT	0					<input checked="" type="checkbox"/>	
	PALLET	pallet	1 Pallet	COUNT	0					<input checked="" type="checkbox"/>	
	CM	cm	Centimetre	LENGTH	1	0.010	✓			<input checked="" type="checkbox"/>	
	M	m	1 Metre	LENGTH	3	1.000	✓			<input checked="" type="checkbox"/>	
	6MIN	6 min	6 minute block	TIME	0	0.100	✓			<input checked="" type="checkbox"/>	
	DAY	day	1 Day (8 hours)	TIME	0	8.000	✓			<input checked="" type="checkbox"/>	
	HR	hr	1 Hour (60 minutes)	TIME	2	1.000	✓			<input checked="" type="checkbox"/>	
	L	l	Litre	VOLUME	3	1.000	✓			<input checked="" type="checkbox"/>	
	ML	ml	Millilitre	VOLUME	0	0.001	✓			<input checked="" type="checkbox"/>	
	G	g	Gram	WEIGHT	0	0.001	✓			<input checked="" type="checkbox"/>	
	KG	kg	Kilogram	WEIGHT	3	1.000	✓			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Save Cancel

Code A unique code of up to 8 characters that can include both letters and digits

Name The UOM name associated with the code. This is the unit that will be printed on documents such as Purchase Orders and Invoices.

Description Description of the Unit of Measure

Group Code The type of Unit of Measure. See [IC UOM Groups](#). A group can contain only one Base UOM. Group Code is optional.

Decimals The number of decimal places allowed for the UOM. For Non Base UOMs, UOM Decimals plus decimals from Multiplier can not be greater than the Base UOM Decimals for the Group. This is so that quantities calculated as UOM Quantity times UOM Multiplier can always be expressed in Base UOM decimals without rounding.

Multiplier	Amount to multiply the Base UOM of the Group by. For example, the Base UOM for the Group TIME may be HOUR ; the multiplier for the UOM DAY may then be 8 (hours). If the multiplier varies – eg a BOX UOM may contain 12 of one Product but 18 of another, leave it blank so you can set the Multiplier on a per Product basis.
Fixed Multiplier	When a Multiplier is entered, the Fixed Multiplier is set to Selected which means it cannot be changed.
Add'l Weight	Additional weight for the UOM. For example, a PALLET UOM may have its own weight, to be added to the product weight. Additional Weight must be expressed in the Base UOM for the Group.
Add'l Volume	Additional volume for the UOM. For example, a BOX UOM may have its own volume, to be added to the product volume. Additional volume must be expressed in the Base UOM for the Group.
Base	Selected , the UOM is the Base UOM for the Group . This is read only, and is set to Selected when the UOM has a Multiplier of 1 . Each group can have only one Base UOM .

2. Assign Base UOM codes to your Products

Assign Base UOM codes to products where required.

There are three ways this can be done.

- Manually
- From Stock Group Defaults
- Using a script

If UOM Required is ticked in IC UOM Maintenance, all Products must have a Base UOM code.

Manually Assigning Base UOM Codes to Products

Maintain > IC > Products > UOM tab

Assign a Base UOM code to products where required.

You can assign Other UOM codes if you have added these, or you can assign them later.

The Default Sale UOM and Default Purchase UOM codes will default from the Base UOM but these can be changed.

Errors will occur if the Base UOM cannot apply as its decimals are lower than the decimals used previously. The error message will say: “Quantity cannot be represented in Base UOM Decimals”. You will need to increase the Decimals on your Base UOM code to match those reported, then re-apply this process.

Stock Groups Defaults

Maintain > Inventory Control > Stock Groups

You can select a Default Base UOM code for each Stock Group where required. This will set the Default UOM code for new Products where the relevant stock group is selected.

Code	Stock Group Name	Default UOM Code	GL Clos...	GL Stoc...	GL Tran...	GL Tran...	Inactive
0000	Unspecified		2300.000	9140.000	2200.000	2200.000	
FG	Finished Goods	EA	2300.000	9140.000	2200.000	2200.000	
KIT	Kitset	EA	2300.000	9140.000	2200.000	2200.000	
LAB	Labour	HR	2300.000	9140.000	2200.000	2200.000	
PART	Parts	M	2300.000	9140.000	2200.000	2200.000	
RAW	Raw Materials	M	10.000	9140.000	2200.000	2200.000	

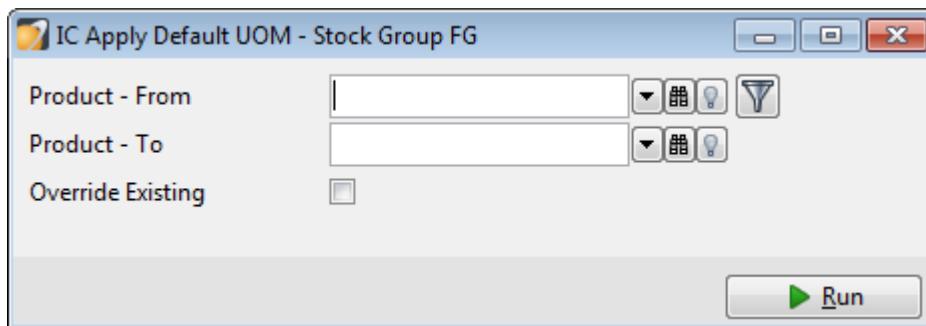
Apply Default UOM Codes to Products and Validate

You can then apply the Base UOM codes to existing products in each stock group that has a Default UOM code. This will also set the Default Sale UOM and Default Purchase UOM to the base UOM for each product.

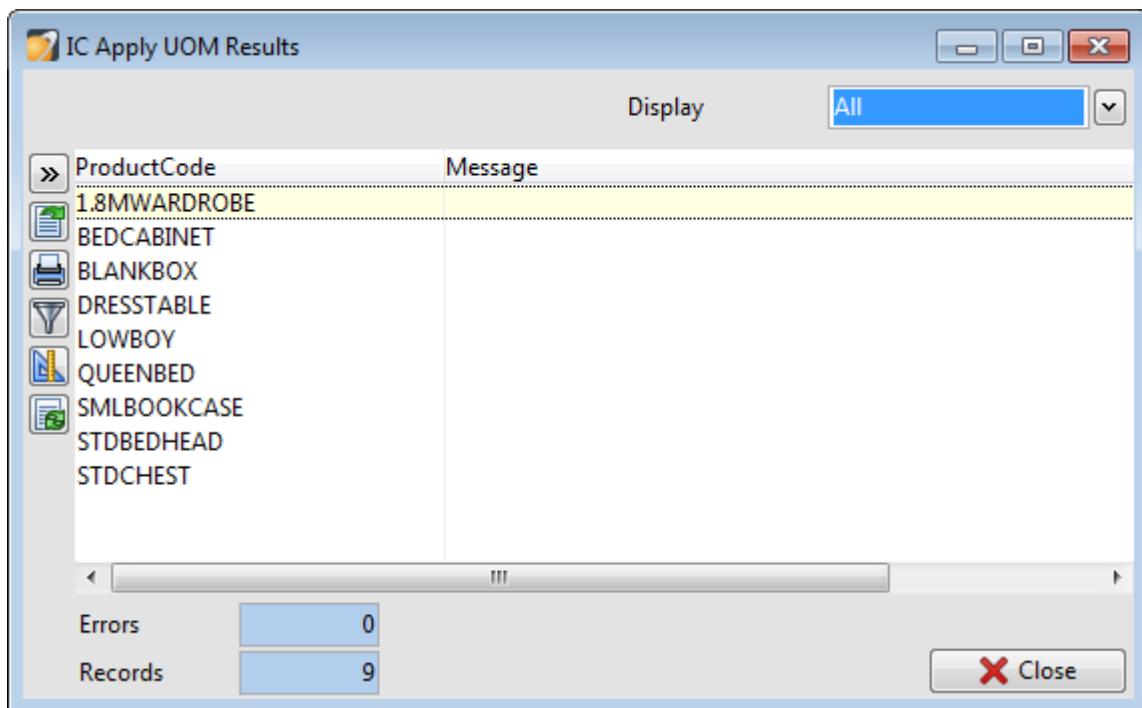
Select a Stock Group, then click the 'Apply Default UOM Code to Products Base UOM Code' button.

Code	Stock Group Name	Default UOM Code	GL Clos...	GL Stoc...	GL Tran...	GL Tran...	Inactive
0000	Unspecified		2300.000	9140.000	2200.000	2200.000	
FG	Finished Goods	EA	2300.000	9140.000	2200.000	2200.000	
KIT	Kitset	EA	2300.000	9140.000	2200.000	2200.000	
LAB	Labour	HR	2300.000	9140.000	2200.000	2200.000	
PART	Parts	M	2300.000	9140.000	2200.000	2200.000	
RAW	Raw Materials	M	2300.000	9140.000	2200.000	2200.000	

A selection box will appear allowing you to select or filter for a range of Products or just click Run to apply to all Products in the Stock Group



You will then get an IC Apply UOM Results window which reports Successes and Errors.



Errors will occur if the Default UOM Cannot apply as its decimals are lower than the decimals used previously. The error message will say: “Quantity cannot be represented in Base UOM Decimals”. You will need to increase the decimals on your Base UOM code to match those reported, then re-apply this process.

Repeat this for all stock groups required.

If you have ‘UOM Required’ ticked, you will need to have a base UOM Code applied to each product before you can activate UOM so this can be a convenient way to assign the base UOM codes.

Scripting

If you need a scripting solution, contact your QSP.

3. Adjust stock Quantities to base Products and inactivate non base Products.

Note: This step is optional

In the past you may have used more than one Product Code to represent different units of the same Product. For example, you may have setup a manual Kitset where the Part Code represents a different unit of the Kitset code, or used a negative Manufacture to break down a larger Product into a smaller unit represented as a Part code. Or you may just have different Product codes entered for the different units.

Decide which Product will be the base Product, that is the one you will count for stocktake. It will usually be the Product representing the smallest unit.

The non base Products can be made inactive so long as the Quantities are zero, so you may need to enter some adjustments.

Calculate the adjustment for the Base Product using a multiplier relating the non base Product.

Eg let's say you had a Product Code of "BOX" and Product Code of "WIDGET" and you count your stock in Widgets, so "WIDGET" will be the base product.

A "BOX" contains 12 "WIDGETS" so 12 is the Multiplier.

The "BOX" has say 2.5 in stock. So you to convert the qty of 2.5 Boxes into Widgets.

The calculation is $2.5(\text{boxes}) \times 12 (\text{multiplier}) = 30$. Stock Adjust 30 to WIDGET.

Then Stock Adjust – 2.5 to BOX and make BOX inactive.

Suggested steps for this task

- a. Backup first.
- b. Decide on your base Products their related non base Products – we can't tell you how to report on these, but if you used Kitsets and\or Negative Manufactures as a workaround for UOM you can run an IC Components report to view all your recipes.
- c. Print IC Pend report and deal with any allocations containing non base Products.
- d. Make all base Products diminishing so quantities can be entered.
- e. Calculate stock adjustments for base Products and key these in.
- f. Enter negative adjustments for non base Products to make the quantity in stock zero.
- g. Make the non base Products inactive.

4. Add Special Pricing Quantity Breaks for UOM Codes

If you want to give discounts for Products when they are sold in different Units of Measure, you will need to set up SP Product Rules where the UOM codes are specified in the Quantity Breaks and assign a Minimum Qty, discount and\or % to the relevant UOM code or codes.

First go to Setup > SP > Settings – and make sure Use Quantity Breaks is ticked.

Then setup your Product Rules

Maintain > SP > Select Rules and setup rules as required.

The screenshot shows the 'SP Rule Maintenance' window. At the top, there are fields for 'Who' (Product: BRASS52LOCK), 'Where' (Start and End dates), 'Priority' (set to 9), and other settings like 'Inactive' and 'Reference'. Below these are sections for 'Rules' and 'Breaks'.

Rules: A table with columns: Who 1 Type, Who 1, Rule Type, Base Cost, Base Sell, Bypass, Currency, Amount, Percentage, Effective... . One row is selected with 'Sell Relative' under Rule Type and NZD under Currency.

Who 1 Type	Who 1	Rule Type	Base Cost	Base Sell	Bypass	Currency	Amount	Percentage	Effective...
		Sell Relative				NZD			

Cost: \$26.0882 Sell: \$0.00 Discount: 0.00% Effective Price: \$0.00 Effective Margin: 0.00%

Breaks: A table with columns: UOM Code, Min Quantiti..., Amount Currency, Percentage, UOM Cos..., Effective Pr..., Effective M... . Three rows are listed: BOX (Min Qty: 1, Amount: \$0.0000 NZD, Percentage: 5.00%, Effective Price: \$156.5292), INNER (Min Qty: 1, Amount: \$0.0000 NZD, Percentage: 10.00%, Effective Price: \$313.0584), and OUTER (Min Qty: 1, Amount: \$0.0000 NZD, Percentage: 15.00%, Effective Price: \$626.1168).

UOM Code	Min Quantiti...	Amount Currency	Percentage	UOM Cos...	Effective Pr...	Effective M...
BOX	1	\$0.0000 NZD	5.00%	\$156.5292		
INNER	1	\$0.0000 NZD	10.00%	\$313.0584		
OUTER	1	\$0.0000 NZD	15.00%	\$626.1168		

5. Edit any Customised Documents and Labels to reflect UOM

Setup > Company > Reporting > Document Defaults

Press F11, select the Custom Document, then click the Edit Document Button to open the Document in the Designer.

Type	Document	Email Document	Email Template	Default Printer	Bin
AP Cheques	APCheque.pdf				
AP Creditor Batch La...	APLabelSample.pdf				
AP Creditor Labels	APLabelSample.pdf				
AP Remittance Advises	APRemit.pdf				
AP Shipment	APShipment.pdf				
AP Shipment Product...	ICLabelSample.pdf				
AR Customer Batch L...	ARLabelSample.pdf				
AR Customer Labels	ARLabelSample.pdf				
Edit Document (F12)					
AR Receipts	ARReceipt.pdf				
AR Statements	ARStatement.pdf				
FA Asset Batch Labels	FALabelSample.pdf				
FA Asset Labels	FALabelSample.pdf				
IC Count	ICCount.pdf				
IC Product Batch Lab...	ICLabelSample.pdf				
IC Product Labels	ICLabelSample.pdf				
IC Product Sheet	ICProductSheet.pdf				
IC Transfer	ICTransfer.pdf				
IC Transfer Dispatch ...	ICLabelSample.pdf				
IC Transfer Receipt La...	ICLabelSample.pdf				
IN Invoice Labels	INLabelSample.pdf				
IN Invoice Product La...	ICLabelSample.pdf				
IN Invoices	INInvoiceABCHoldings.pdf	[...]	INInvoice.html		
IN Packing Slips	INInvoice.pdf				
IN Quotes	INInvoice.pdf				
JC Job Batch Labels	JCLabelSample.pdf				
JC Job Labels	JCLabelSample.pdf				

Change the Expressions for Qty, Unit, and SellingPrice to reflect UOM as per examples below.

Qty: FormatQuantity(InvoiceLine.UOMQuantitySupplied,InvoiceLine.UOMCode)

Unit: InvoiceLine.UnitName

SellingPrice: InvoiceLine.UOMSellingPrice

You can copy these Expressions from the Sample Documents provided and paste into your Documents

6. Backup your data

7. Activate UOM

Setup > IC > Units Of Measure

Press Edit and change the UOM Status to 'Active' if you have taken a backup, tick the Backup Taken checkbox and press Ok. DO NOT PRESS OK IF YOU HAVE NOT BACKED UP FIRST.

Activating UOM will replace Unit with Base UOM code on Maintain > IC > Products > Products Tab for any Products that have a Base Code on the UOM tab, or all Products if you have UOM Required. UOM codes will be exposed throughout the system wherever quantities are entered.

Summary of Steps

1. Add UOM Codes
2. Assign UOM Codes to Products
3. *Optional: Backup Data and do any stock adjustments to base Products and Inactivate any non base Products*
4. *Optional: Add any SP Product Qty Break Rules for UOM Codes*
5. Edit any custom Documents to use UOM codes. You can copy fields out of the standard Document Designs.
6. Backup Data
7. Make UOM Active.

UOM Example for a Tile Supplier.

We count our Tiles in Cartons. Each Carton contains 25 Tiles.

We can setup a Group for Tiles

CARTON of 25 Tiles is the **Base UOM**.

We can Sell single Tiles. **TILE** is another UOM. **The Multiplier** for a Tile is $1 / 25$ so **.04**

We can Buy Tiles in Square Meters. **SQM** is another UOM. 1 carton is 2.5 Square Metres.

The Multiplier for the SQM is $1 / 2.5$ so **.004**

IC Units of Measure Maintenance										
UOM Status		None		UOM Required						
Code	Name	Description	Group Co...	Decimals	Multiplier	Fixed Multip...	Add'l Wei...	Add'l Vol...	Base	Inactive
EA	each	Each	COUNT	0	1.00	✓			✓	
CARTON	Carton	Carton of 25 Tiles	TILES	2	1.00	✓			✓	
SQM	Sqm	Square Metre of Tiles	TILES	1	0.40	✓				
TILE	Tile	Single Tile	TILES	0	0.04	✓				