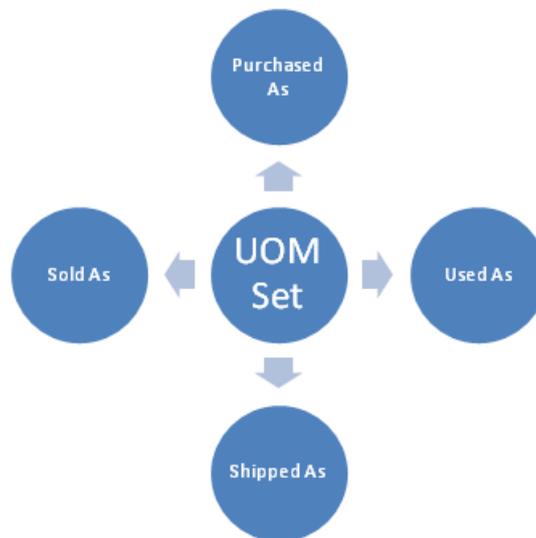# UOM Sets

Last Modified on 10/23/2023 10:05 am EDT

Overview

While the primary measure for an item dictates how it is stocked (most commonly an Each), it may need to be bought, sold or used in production with different measures. This is where a Unit of Measure set comes in.

A Unit of Measure Set will define how your items are sold, purchased, and used when it is different than the primary measure. Setting multiple units of measure will customize a Unit of Measure Set to be processed as you define them in the system. (i.e. System will read your items as each, but customize to sell, purchase, and used as they have been pre-assigned).

> 🔔 To allow the system to Sell, Use and Purchase using multiple units of measure select "Enable Multiple Units of Measure" preference in   Company Preferences > Items.

Understanding Units of Measure

There are four types of units of measure:

- Primary
- Sold As

- Purchased As
- Used As

The primary unit of measure is how quantities are stocked.   (The quantity on inventory reports, item details and inventory counts etc). The other units of measure along with the associated conversion rates are used to display meaningful quantity information to users, customers, and vendors.

> 💡 If you inventory, sell, buy and use in the same unit of measures then you don't need to complete the units of measure sets section.

When entering new measures for sets you can calculate the conversion rates using the following formula:

X of Primary UOM = 1 Secondary UOM

The X is the conversion rate from the primary unit of measure. If the primary unit of measure is Each and you purchase the item in dozens, then the conversion rate is 12, meaning 12 EA per DZ. A good rule of thumb is if a unit of the new measure will be larger than the primary measure, the Qty Per will be greater than 1. If it is less, it will be a decimal and less than 1.

A '1' in the Qty Per means the new measure will match the primary measure and no conversion will take place.

Example 1 -

XYZ Co. inventories juice by the gallon and uses it during production in quarts. XYZ uses 1 quart = .25 gallons.

- Primary UOM = Gallons
- Used As UOM = Quarts
- Conversion = .25

Example 2 -

ABC LLC inventories widgets in Each but purchases them in dozens. Using the formula 12 Each = 1 Dozen.

- Primary UOM = Each
- Purchased As UOM = Dozen
- Purchased Conversion = 12

Enable UOM Sets

In order to access UOM Sets the admin user must first enable the use of multiple units of measure in the Company Preferences Menu under the section titled Item. Then click save in the top right.
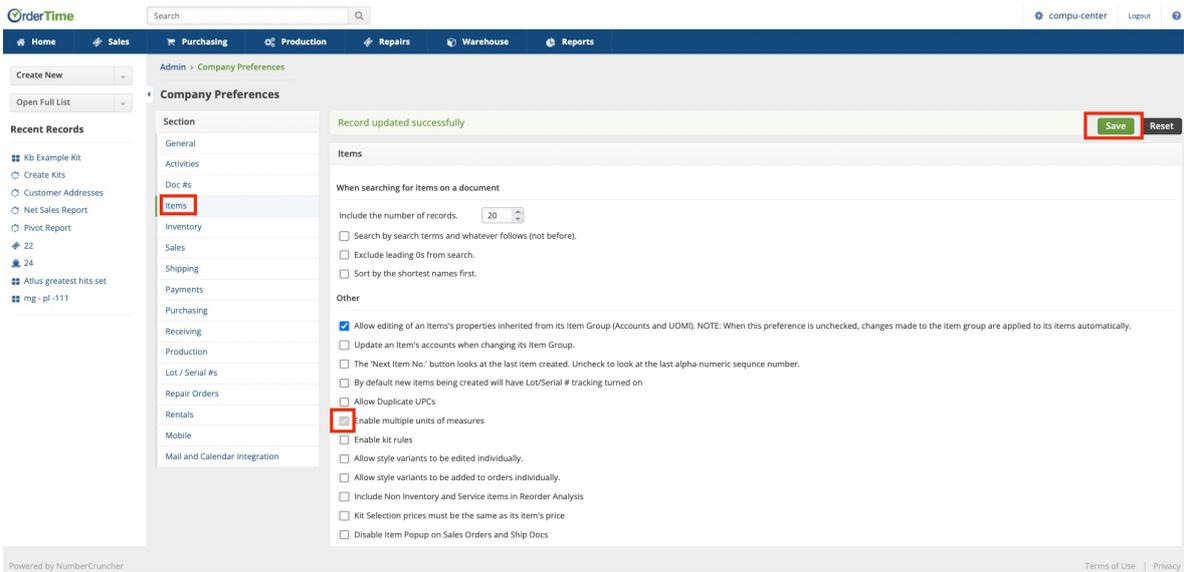
Define a Unit of Measure Set

To create a custom Unit of Measure Set, click on the Gear icon, select Profile List under the General section. On the Profile List Screen, select **UOM Sets** from the **General** section.
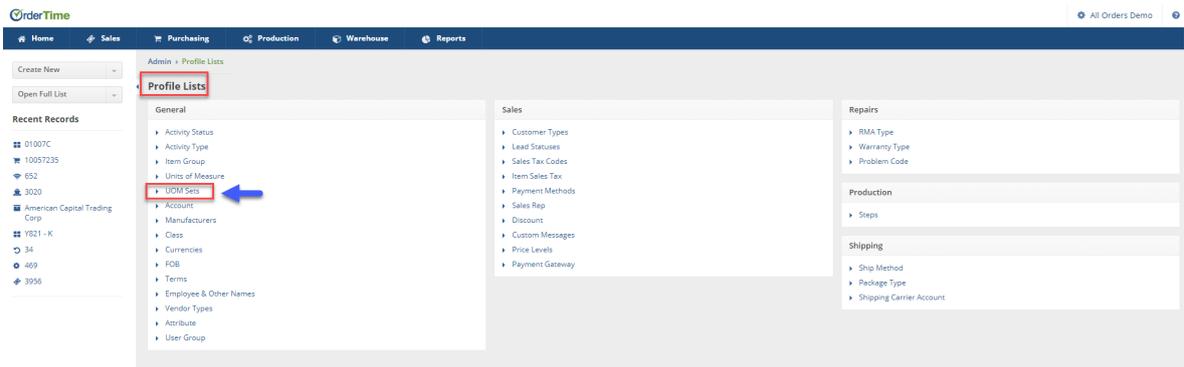
Enter your Alternate units of measure sets

Once you have selected UOM Sets from the Profile Lists (Gear Icon> Profile List> UOM Sets), the screen will open.

- Enter the name for the Unit of Measure.
- Under Primary drop-down list, select the appropriate unit of measure (i.e. each, yard, feet, inches, minutes, house etc.)

- Under Alternates, you can enter a set of units of measure with Quantity Per assigned to each

unit.
- Add the **UOM** and enter a number of units, that will be used per unit of measure
- List all possibilities that may ever be used for buying, selling and using in production in this list.

Name	Dasani
Active	☑
Primary	Each ▼ Add Uom

Alternates

Uom	Qty Per	Action
Dozen	12	✖
Case	24	✖
84 Case Lot	2016	✖

Defaults

Under default selection, select from the alternates that you have just entered which will be the most commonly used and therefore by the pre-selected option depending on the type of document the item is being added to.

- Select from the drop-down menu how your items will be **SOLD AS**
- Select from the drop-down menu how your items will be **PURCHASED AS**
- Select from the drop-down menu how your items will be **USED AS**

The selections available from the drop-down menu will be same selections that are entered under the Alternates

Defaults

Sold As	Dozen ▼
Purchased As	84 Case Lot ▼
Used As	Case ▼

🔔 Once you have established a UOM set, it can be used to create a new item. You can give the item the properties for this Unit of Measurement.

Now that you have determined your UOM Sets, you can change the UOM on any line item to one of the alternates. On any line item, click on edit action icon to navigate to the line item editor.

Once on the line item editor, click the UOM hyperlink and you will see the Change unit of measure dialog box. Select the desired UOM by clicking the its hyperlink.

Defining Cost with UOM Sets:

It is import to also make sure you have set your item cost to reflect the units of measure for reporting purposes. To do this you will want to make sure you Item Group has a default cost type of : Default Vendors Cost

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

Parts Group

Name	Parts Group
Short Name	PT
Item Type	Part ⌄
Is default	☑
Active	☑

Default Accounts

Income Account	Sales [Income] ⌄
Asset Account	Inventory [Other Current Asset] ⌄
COGS Account	Cost Of Goods [Cost of Goods] ⌄
UOM Set	EA-2 ⌄
Is Sold	☑
Is Used	☑
Is Purchased	☑
Item Cost Type	Default Vendor's Cost ⌄

Then you will need to ensure that your Items have a Default vendor associated with them. Input the cost of the item at the Purchasing unit of measure.

Home ▸ Items ▸ Item   Created By Jason Swan 2/7/2021 10:12 AM   Modified By Jason Swan 2/7/2021 11:1

Item - SEL-BEG-0001 EDIT Print Label ⌄

General

Description	Entry level Soccer balls
Type	Part
Group	Parts Group Change group
UOM	EA
Price	30.00
Std. Cost	10.00

Summary

Available	4.0000
Required	0.0000
Net Available	4.0000
On hand	4.0000
Committed	0.0000
On order	0.0000

NO IMAGE

Note Edit

Inventory | Custom | On Order Detail | Required Detail | Transactions | **Vendors** | Related Items | Customer Aliases | Item Image | Attachments | Barcodes | Alias

⚙ 🖨 ⬈   ➕ Add

IS DEFAULT	VENDOR ▲	PART NO	VENDOR UPC	ITEM	COST	MIN ORDER	ORDER INC	LEAD TIME	UOM	ID	CURRENCY	ACTIONS
✔	Select			SEL-BEG-0001	250.00000	4		21	Box	835		✎ ✖

Total Records: 1

Notice the Standard cost of the item. This item is a box of 25 soccer balls. My UOM Set for this example has a primary of Each (Soccer Ball) and an alternate of Box with a Qty per of 25. So Order Time will make the calculation of Purchasing cost ($250) divided by the number of eaches (25) to determine the standard cost of the item.

250 / 25 = 10

Created By Jason Swan 2/7/2021 10:12 AM   Modified By Jason Swan 2/7/2021 11:1

Item - SEL-BEG-0001 EDIT   Print Label ▾

General

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Note Edit

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⚙ 🖨 ⤤   ➕ Add

IS DEFAULT	VENDOR ▲	PART NO	VENDOR UPC	ITEM	COST	MIN ORDER	ORDER INC	LEAD TIME	UOM	ID	CURRENCY	ACTIONS
✓	Select			SEL-BEG-0001	250.00000	4		21	Box	835		✎ ⚙

Total Records: 1