# **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

Δ

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.

Home	Sales Purchasing	O <sup>®</sup> Production	& Repairs	Warehouse	eb Records
	Admin → Company F	Preferences			
Create New	·				
Open Full List	- Company Prete	erences			
lecent Records	Section	F	tecord updated suc	essfully	Save
	General		ame		
Kb Example Kit	Activities		terna		
Create Kits	Doc #s	v	/hen searching for iter	ns on a document	
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22	Sales		Search by search te	rom search	s (not before).
24	Shipping		Sort by the shortest	names first.	
Atlus greatest hits se	Payments				
mg - pl -111	Purchasing		ther		
	Receiving		Allow editing of an I	tems's properties inherite	ed from its Item Group (Accounts and UOMI). NOTE: When this preference is unchecked, changes made to the item group are applied to its items automatically.
	Production	1	Update an Item's a	counts when changing its	s Item Group.
	Lot / Serial #s	1	The 'Next Item No.'	button looks at the last it	em created. Uncheck to look at the last alpha-numeric sequnce number.
	Repair Orders		By default new item	s being created will have	Lot/Serial # tracking turned on
	Rentals		Allow Duplicate UP	is .	
	Mobile	L	Enable kit ruler	is of measures	
	Mail and Calendar I	ntegration	Allow style variants	to be edited individually.	
			Allow style variants	to be added to orders inc	dividually.
			Include Non Inventi	ory and Service items in R	- teorder Analysis
		1	Kit Selection prices	must be the same as its it	tem's price
		1	Disable Item Popup	on Sales Orders and Ship	p Docs

# 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.

ØrderTime					All Orders Demo	0
r Home 🛷 Sales	₩ Purchasing 0° Pro	duction 😨 Warehouse	Reports			
Create New + Open Full List + Recent Records	Admin > Profile Lists Profile Lists General Activity Status			Sales	Repairs	
■ 01007C ■ 10057235 ● 652	Activity Status     Activity Type     Item Group     Units of Measure			Lassimir types     LasSitutes     SalesTax Codes     Item SalesTax	<ul> <li>Warrang Type</li> <li>Warrang Type</li> <li>Problem Code</li> </ul>	
GOLD     American Capital Trading     Corp     Y821 - K     34	Account     Account     Manufacturers     Class     Currencies			Pagirent retainous     Sales Rep     Discount     Custom Mesages     Print levels	> Steps	
<ul> <li></li></ul>	FOB FOB Forms Fonployee & Other Names Vandor Turas			Payment Gateway	Ship Method     Package Type     Shipping Carrier Account	
	Attribute     User Group					

#### 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.)

JNITS		
Name	UNITS	
Active	<ul> <li>Image: A start of the start of</li></ul>	
Primary	Each 🔻	Add Uom

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

unit.

- $\circ~$  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	<b>v</b>			
Primary	Each		<ul> <li>Add Uom</li> </ul>	
ates				
	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 the prope	have established a UOM set, it can be used to create a new item. You can give the item rties 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.

Purchase Order - 10 Create PDF +						Status Processing *
General	Bill Address	Ship Address		Summary Revisi	on : 1	
Verder Boyde Winkssie No. 10 Date 1021/2018 Promite Date: 1021/2018 Terms Details Memo & Internal Notes Custom Name/Number • Search Items	essanor WHOLESAE Tor GREER TAL S SAN RANCSCO, CA SH111 USA Dependency Receivers Attachments Open Activities A	ctivity History		Total Amount		80.00
ITEM DESCRIPTION		QUANTITY	UOM	COST	EXT.	ACTIONS
TSL - Black Company Branded T-Shirt Large Blac	k. Order Code #2412	4.00	EA	20.00	80.00	80

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.

thasing > Purchase Order	rs + Purchase Order Line				
rchase Order Line f	for Purchase Order 10				
ltem	TSL - Black				
Line No.	1				
ieneral Custom					
Cheran					
Description	Company Branded T-Shirt Large Black. Order Code #2	412			
Quantity					
Quantity	4.00	Change unit of measure			
LIOM	FA	change and of measure			-
Cleared					
Line Instructions		UOM	PRICE/COST	QUANTITY	
		Feet	10.00	8.00	
					-

#### **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

Admin → Profile Lists → Item (	Group			
ltem Group				
Active Status		Parts Group		
O Active O Inactive O I	Both	Name	Parts Group	
Records	0	Short Name	PT	
Additional Fees	8	Item Type	Part	*
Assembly Group	8	ls default	✓	
Jobs Group	8	Active		
Kits Group	8	Default Accounts		
Non-inv Group	8	Income Account	Calar (Iarama)	
Other Charge Group	0	Asset Account	Sales [income]	Ť
Services Group	0	COGS Account	Cost Of Goods [Cost of Goods]	~
Total Records: 8		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 Jaso	n Swan 2/7/2021 11:1
Item - SEL-BEG-0001 Print Label v						
General	Summary					
Description Entry level Soccer balls	Available		4.0000			
Type Part	Required		0.0000			
Group Parts Group Change group	Net Available		4.0000			
Price 30.00	On hand		4.0000			
Std. Cost 10.00	Committed		0.0000			
	On order		0.0000			
Note 📧						
Inventory Custom On Order Detail Required Detail Transaction	Vendors Relate	ed Items Customer Aliases I	tem Image Attachmen	ts Barcodes Alia	as	
* @ #						O Add
IS DEFAULT VENDOR ^ PART NO VENDOR UPC	ITEM	COST MIN ORDER	ORDER INC	LEAD TIME U	JOM ID CURRENCY	ACTIONS
Select	SEL-BEG-0001	250.00000 4		21 B	3ax 835	80
		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

actacle       Sammary       Active	return v       Availab       4vailab							Cre	sated By Jason Sw	an 2/7/2021 10:12 AM	Modified By Jason Swan 2/7/2021 11
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