Product Setup

BisTrack provides exceptional flexibility in the setup of Products.

Through the use of UOM and UOM Rules, products can be bought and sold in multiple units of measure. We will introduce you to their setup along with the concept of Product Groups.

From there we will walk through adding a Generic Product including one with multiple UOMs.

Products are assigned rules related to the units of measure they are bought and sold in.

Every product is assigned a UOM Rule and each has one or more UOMs attached.

On sales and purchase orders you can specify quantities and prices in the desired UOM.

The setup occurs within System Manager 'Products' view.

Select 'UOMs'.

To see the current list, click 'Go' without entering a 'Find' filter.

Double-click on the 'UOM'.

UOMs are assigned a 'Code' and descriptive 'Name'.

A measurement 'Type' is given based on those available from the drop down list. Select 'Unit' as the 'Type'.

The 'Conversion to base' sets up the conversion that may occur to calculate quantity and price.

For this UOM there is a '1 Each in every Each'.

The Pallet UOM has a 'Conversion to base' of 120.

This means that there are 120 Each's in every Pallet.

This bag of feed UOM indicates that there are '50 Each's in each 50 pound bag of feed'.

UOMs are assigned to UOM rules.

Select 'UOM Rules' from the System Manager 'Products' view.

To see the full list, click 'Go' without entering a 'Find' filter.

Double-click on a 'UOM Rule'.

This is a UOM Rule assigned to products that are sold by the Each.

The 'Stock as' UOM is set to 'Each'.

The 'Input As' and 'Purchase Input As' UOMs are also set to 'Each'.

These indicate what Unit of Measure to use when this product is placed on a sales or purchase order.

This Rule has multiple UOMs.

Both the 'Box' and the 'Pallet' are being used.

The 'Stock As' is set to Box indicating that number of boxes will be shown in the Stock Information not the number of Pallets.

The 'Input As' or selling quantity is 'Box'

However, the 'Purchase Input As' or buying quantity is 'Pallet'.

The 'Buy Price As', 'Sell Price As' and 'Input As' can be entered using either UOM.

Product Groups are used to arrange products into logical categories.

This is useful for product searches, purchasing and printing reports.

From within System Manager 'Products' view, open Product Groups.

Product Groups start with a major group name like 'Building Materials' and clicking on the '+' expands to show the related sub-groups.

When there are no '+' signs shown alongside a group name you have expanded the list as far as it goes.

The more levels that are created, the more detailed reporting you are able to do.

Best Practice is to have 2 or 3 levels of sub-groups for each major group.

From the 'Views' pane, select the 'Find Products' option.

Click on the 'New' icon at the top of the window.

Select 'Generic' from the 'Product type' drop down.

Generic products are products that don't need advanced lumber options like tallies .

These include items such as tools, ladders, nails, paint, insulation and the like.

Click on the 'UOM Rules' button to search for and select the rule.

Enter the 'Product code' or click the 'Generate' button to have BisTrack assign one.

Enter the 'Description' and 'Short description' for the product.

Click on the button to search for the 'Product Group' to assign.

On the 'Stock Options' tab select a default 'Supplier'.

Review the checkbox options and select any that may be appropriate.

On the 'Buying' tab select the 'Price Group' that is available. A 'Price Group' is used to build buy price rules and for reporting purposes.

Select the 'Tax group' and 'Purchase analysis code' from the drop down lists.

The 'Purchase analysis code' is used for reporting purposes.

On the 'Selling' tab select the 'Price Group' that is available. A 'Price Group' is used to build selling price rules and for reporting purposes.

Select the 'Tax group' and 'Sales analysis code'.

The 'Sales analysis code' is used for reporting purposes.

On the 'Prices' tab with the 'Company Prices' selected, enter the 'Standard buy price' and its UOM.

Then enter the 'Standard sell price' and its UOM.

While not required, 'Branch' specific 'Standard Buy Price' and 'Standard Sell Price' can also be entered .

With the mandatory fields required to add a new product entered, click on 'Save and Close'.

Alter the same SKU from the 'General' tab by selecting a 'UOM Rule' that has multiple UOMs.

On the 'Prices' tab, select the 'UOM ' for 'Standard Buy Price' and then enter the 'Price'.

Click on the 'UOM' drop down for the 'Standard sell price'.

Select the 'UOM' and add the 'Price'.

'Save and Close' the new product.

On a Purchase Order, either Unit of Measure can be used to enter the 'Quantity' and 'Cost Price'.

The 'Total Cost' is calculated based on the UOMs conversion base.

Changing the 'Quantity' UOM, adjusts the 'Total Cost' automatically.

This process works similarly with sales orders.

You should now be able to add new products assigning the appropriate UOM Rules and Product Groups.

Remember there are several fields that contain mandatory entries on the General, Stock Options, Buying, Selling and Prices tabs.

From the demonstration given you should be able to add a Generic product and recognize the effect of multiple UOMs.

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