

Unit of Measure Overview

Inventory items have one or more units of measure, referred to as UOMs. They specify how a product is stocked in inventory, input on a sales or purchase order, and how it's buy and sell price are represented.

This course will introduce you to the concept of UOM Types, how to add UOMs, and the implementation of UOM Rules for various types of products.

We will also explore using units of measure when Stocking, Buying and Selling Products within BisTrack.

Unit of Measure Types

Six UOM Types are available for different types of conversions including:

- Unit,
- Length,
- Volume,
- Area,
- Weight, and
- Time

Your system came with a number of "system defined" UOMs, representing each type of UOM.

The list of UOMs are located in a table accessible within the System Manager application.

From the navigation pane, select Products.

Choose UOMs from the list.

Click the Go button to display the UOMs.

To ensure the full list is available, press the More button as many times as needed until it is no longer displayed.

Each is given a Code and Name that describe the UOM and what it represents.

They are assigned a UOM Type that corresponds to the six measurements previously discussed.

The type determines the information BisTrack needs in order to convert between the different UOMs a product may have.

Refer to the documentation found in the course materials section of Training on Demand for more information on these conversions.

BisTrack has the most common UOMs in the lumber and building materials industry already set for you.

Review the list and then determine which UOMs you will need to add.

Best practice is to create new UOMs using the Unit type in most cases.

We will begin by adding a UOM for products stocked by each, piece, box, carton, etc.

From the UOM window, click the New icon located on the toolbar.

Enter a Code for the UOM. Try to keep the code short as it is used on reports, in drop-down lists and search results windows.

Enter a detailed Name for the UOM.

From the drop down, set the Type to Unit.

The information icon notifies you that the conversion to base is in Eachs.

The Base uom and System defined checkboxes are left blank.

Enter the number of units in the Conversion to base field.

100 is entered since we are creating a Box of 100.

The information icon updates to display “There are 100 Eachs in every Box of 100”.

To complete the entry, click the Add button.

The fields clear and are ready for you to enter another UOM.

Next, we will add a Length Type UOM.

Length type are for items where a length will be provided either from the product or transaction line.

We start by entering a Code and Name.

Select Length for the Type.

Length UOMs are related to the Length Base UOM which is Metre.

The Conversion to base is the number of metres that are in 100 linear feet.

Once entered, a confirmation of the conversion to base is shown.

When finished with the entry, click the Add button.

You can add another UOM or Close the window.

UOMs are connected by a UOM Rule which is then assigned to a product.

UOM rules determine the unit of measure a product is stocked in as well as the UOMs to use for selling and buying prices or for order input.

Each item has one UOM Rule, however a UOM rule may contain multiple UOMs.

For instance, the product Wood Screws has the UOM Rule “Box of 100” assigned.

Contained within the rule are both the Box of 100 and Each UOMs allowing this product to be stocked or sold using either UOM.

UOM Rules are set within System Manger.

From the Products view, select UOM Rules from the navigation pane.

Click the New icon found on the toolbar.

Enter a Name for the UOM Rule.

Best practice is to use a consistent naming convention that includes the various UOMs that this rule allows, starting with the stocking UOM.

For example, a UOM rule that will stock by the Each but allow buying and selling by a Box of 100 could be named EA/Box(100).

This makes it easier when you are adding new products to quickly find the rule to apply.

The next 6 entries available are for input of specific UOMs.

You can either type the UOM in the field or search and select it by clicking the related browser button.

Start by entering the Base Unit which is the default UOM for this rule.

All other UOMs are selected by default.

The Base Unit and Stock As UOMs must be the same.

Stock values are displayed using the Stock As UOM.

The Input As and Purchase Input As will be the default UOMs used when entering a quantity on a sales or purchase order for products assigned this rule.

Change any of UOMs as required.

The Conversion to base value is shown in brackets alongside the UOM Name.

The second half of the entry allows specification of Buy Price, Sell Price and Input Units of Measure.

The Base Unit is automatically entered with all boxes checked.

All UOMs used in the entries above must be included in here.

Remove any selection that is not applicable for the UOM Rule.

In this example, the Purchase Input As is set to Box of 100.

Removing the check for Buy Prices As indicates this product's Buy price will NOT use Each pricing.

Additional UOMs are added to the line with the asterisk (*).

Click the line under the UOM column heading.

Select the UOM you want to add by entering the name or click the ellipsis to search for it.

Set the options for Buy Prices As, Sell Prices As and Input As.

Pressing Enter finishes the line and adds it to the grid.

Repeat the steps as needed and when finished, click Add.

When you are done creating UOM rules, click Close.

The new Rule is available for assignment to products.

Lumber UOMs can include multiple UOM types.

That is, you may stock lumber by the piece or each, which is a Unit type UOM but buy and sell by the each, LF, or MBF which are Unit, Length and Volume UOMs.

There are predefined rules set up in BisTrack that will handle most lumber type products.

At the UOM Rules window find and open the properties for the Lumber Child rule.

This rule can be used for specific length boards, such as a 2x4 -10s, where the product is stocked by the Each and bought or sold by Each or MBF.

It is set to allow pricing per MBF or Each.

Products using this rule must have a thickness, width and length defined in product properties.

Click OK to close the rule.

Next, we will view the properties for the predefined UOM Rule that can be used for Sheet products.

This rule is set to Stock As Each but it can be priced on sales transactions or purchase orders by Each or MSF.

Products using this rule must have a width and length defined in product properties.

When finished viewing, select OK to close the window.

Take some time to review the various rules available to you.

To see the full list, click the GO button without entering any search text.

You may need to use the More button in order to have all the rules listed.

With the Lumber UOM Rule set, let's take a look at using it with stock information, buy and sell prices and within a purchase and sales order.

UOM Rules are assigned to products on the General tab of product properties.

This is also the tab where the thickness, width and length are defined.

Products assigned the Lumber Child UOM Rule are typically a Tallied Product Type.

This requires the Stock Options setting [pause] for Stock Control by Length to be checked.

To view the stock information, select the Stock tab.

The stock quantities are shown in the default Stock As UOM.

To see the quantities in a different UOM, click the Information button.

A drop-down field called Show stock in lists the other UOMs available.

A different UOM is selected.

The Stock UOM is changed and quantities converted accordingly.

To view the Buy and Sell price settings, select the Prices tab.

Default UOMs are shown for the various prices based on the rule.

The Standard buy price and Standard sell price UOM determine the default that will be used for the price on sales and purchasing transactions.

Clicking the drop down for either shows all the UOMs that can be used. You can change them as needed.

The value in the Price column should match the UOM selected.

Let's put this product on a purchase order.

With the PO started, the product is added.

The Quantity UOM defaults to the Purchase Input As setting and the Cost Price UOM to the Buy Price setting.

Clicking the drop down for either allows you to select from the other UOMs included on the rule.

Changing the Cost price UOM converts the price appropriately.

Now let's put this product on a sales order.

With the order started, the product is entered.

The Qty UOM uses the Input As default and the Price UOM is from the Product Properties.

Clicking the drop down for either allows you to select a different UOM as needed.

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