

# How Do I Setup Purchasing Units Of Measure (UoM)?

# Summary

When purchasing an item, it is common to purchase it in one unit of measure and want to track the item in inventory using another unit of measure. This can be done using a Purchasing Unit of Measure.

## Step by Step Guide

- 1. Navigate to your item via Inventory > Item Master Data
- 2. Open the Inventory Data tab
- 3. In the "UoM Name" field, enter the Unit that you are going to use for Inventory tracking

Item No.	Manual	RX5016					✓ Inver	ntory Item	
Description		Phosphoric Acid				Sales	Item		
Foreign Nan	ne						✓ Purch	hase Item	
Item Type		Items	•						
Item Group		RM: Other	•	Pack Type	UoM - Pound	•			
UoM Group		Manual	•	Bar Code					
Price List		Price List 01		Unit Price	Primary Curre		***		
Process Type	e	None	•	Brand		•			
Gener	al P <u>u</u> rch	nasing Data Sales Data		I <u>nventory</u> Data	Planning Data	Properties	Remar <u>k</u> s	Batches	Attachments
Set G/L Ac	counts By	Item Group				Manage Inventor	y by Warehouse	1	
					Inv	ventory Level			
UoM Name	2	Ounce			Rec	quired (Purchasing	UoM)		
					Min	nimum			
					Ma				

- 4. Open the Purchasing Data tab
- 5. Enter the Unit you use for Purchasing in the "Purchasing UoM Name" field
- 6. Enter your conversion factor in the "Items per Purchase Unit" field

Item No.	Manual	KASU16						✓ Invertige	ntory Item		
Description		Phosphoric	Acid					Sales Item			
Foreign Nam	e	(						Purcl	hase Item		
Item Type It Item Group R		Items		•							
		RM: Other		•	Pack Type	UoM - Pound 🔻					
JoM Group		Manual		•	Bar Code Unit Price						
Price List		Price List 01				Primary Curre					
Process Type			None		Brand	<b>T</b>					
erocess rype	e	None		•	Brand		•				
General General Preferred Ve	e al endor	None Purchasing Data	Sales Data	• I <u>n</u>	Brand ventory Data	Planning Data	P <u>r</u> operties	Remar <u>k</u> s	Batches	<u>A</u> ttachments	
General General Preferred Ve	e al endor No,	None Purchasing Data	Sales Data	▼ <u>In</u>	Brand ventory Data	Planning Data	▼ P <u>r</u> operties	Remar <u>k</u> s	Batches	<u>Attachments</u>	
General General Preferred Ve	e al endor No,	None Purchasing Data	Sales Data	▼ 	Brand ventory Data	Planning Data	Properties	Remar <u>k</u> s	Batches	<u>Attachments</u>	
General General Preferred Ve Mfr Catalog Purchasing	e al endor No, UoM Name	None Purchasing Data	Sales Data	• <u>1</u> () ()	Brand ventory Data	Planning Data	Properties	Remar <u>k</u> s	Batches	<u>A</u> ttachments	
General General Preferred Ve Mfr Catalog Purchasing Items per Pu	e al endor No, UoM Name urchase Uni	None Purchasing Data	Sales Data		Brand ventory Data	Planning Data	Properties     Length     Width     Height	Remar <u>k</u> s	Batches	<u>A</u> ttachments	
General General Preferred Ve Mfr Catalog Purchasing Items per Pu	e al endor No. UoM Name urchase Uni	None Purchasing Data	Sales Data		Brand ventory Data	Planning Data	Properties      Length     Width     Height     Volume	Remar <u>k</u> s	Batches	<u>A</u> ttachments	
Genera Preferred Ve Mfr Catalog Purchasing I Items per Pu	e al endor No. UoM Name urchase Uni	None Purchasing Data	Sales Data		Brand wentory Data	Planning Data	Properties      Length     Width     Height     Volume     Weight	Remarks	Batches	<u>A</u> ttachments	

7. Click "Update" to save your changes



After making these changes, you can create Purchasing documents using the same unit that you vendor uses and the system will automatically break it down into your Inventory unit of measure. Tip: You can use Form Settings to make the "Qty(Inventory UoM)" field visible on Purchasing documents to confirm that your conversion is working.

		N MARTA					N		10007		
endo	r	V1021					No. P	rimary *	1000/	- 0	
ime	ct Dorron	Fisher Scientific	<b>T</b> O				Besting Da	to.	Upen 12/02/14		
onta	ar Person						Posting Da	nto.	12/02/14		
endor Ker, No.							Decument	Data	12/02/14		
	Contents	Logistics	I	Accounting Attachments							
iten	/Service Type	Item 🔻					Summary Type		No Summary		
#	Item No.	Item Description	Whse	Quantity	Qty(Inventory UoM)	Unit Price	Tax Code	Total (LC)		Blanket Ag	
L	📫 RX5016	Phosphoric Acid	📫 A1	10	1,280	\$ 5.0000	📫 EX		\$ 50.00		-
			1								
					1						
	•									•	
er	2	-No Sales Employee-	•				Total Befor	e Discount		ş	50.
							Discount	%			
							Preight Round	ing l			* 0
							Tay	ing (			ş 0.
							Total Paym	ent Due		\$	50

### Common Issues:

### WHAT IF I RECEIVED ITEMS WITH THE WRONG PURCHASING UOM?

The best case scenario would be to catch this before the item has moved from the Warehouse it was received in. If so, you would want to cancel or reverse the inventory transaction that brought the item into stock, correct the Purchasing UoM, and then re-create a new PO and copy to GRPO. Please create a new PO instead of duplicating the previous PO, as this would still use the previous Unit of Measure.

If the item has been used in production or transferred out of the receiving Warehouse, you will want Goods Issue or Goods Receipt the difference of units to bring the current stock to the correct amount. From there, an Inventory Revaluation can be used to revalue the current stock in your warehouses. If you have multiple PdOs that have been completed with incorrect costs due to an item with incorrect Purchasing UoM, please submit a Support Ticket.

Version 4.5.1.0