



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
Description Phosphoric Acid
Foreign Name
Item Type Items
Item Group RM: Other
UoM Group Manual
Price List Price List 01
Process Type None
Pack Type UoM - Pound
Bar Code
Unit Price Primary Curr
Brand
 Inventory Item
 Sales Item
 Purchase Item
General Purchasing Data Sales Data **Inventory Data** Planning Data Properties Remarks Batches Attachments
Set G/L Accounts By Item Group
UoM Name Ounce
 Manage Inventory by Warehouse
Inventory Level
Required (Purchasing UoM)
Minimum
Maximum

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

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Pack Type UoM - Pound
Bar Code
Unit Price Primary Curr
Brand
 Inventory Item
 Sales Item
 Purchase Item
General Purchasing Data Sales Data Inventory Data Planning Data Properties Remarks Batches Attachments
Preferred Vendor
Mfr Catalog No.
Purchasing UoM Name Gallon
Items per Purchase Unit 128
Packaging UoM Name
Quantity per Package 1
Length
Width
Height
Volume
Weight

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.

#	Item No.	Item Description	Whse	Quantity	Qty(Inventory UoM)	Unit Price	Tax Code	Total (LC)	Blanket Ag...
1	RX5016	Phosphoric Acid	A1	10	1,280	\$ 5.0000	EX	\$ 50.00	
2									

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