

**Adaxia**



## **UOM Conversion**

## DOCUMENT SUMMARY SHEET

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## Table of Contents

### Unit of measure Conversions

1.1	What is a UOM Conversion?.....	3
1.2	Creating a UOM Conversion.....	3
1.3	Example Order with a UOM Conversion.....	4
1.4	Adjusting for Weight and Volume Differences.....	6
1.4.1	Internal Use Inventory Window.....	6
1.5	Other Uses for UOM Conversion.....	8

### Adaxa's Offices and Contacts

2.1	Australia.....	9
2.2	New Zealand.....	9
2.3	United States of America.....	9

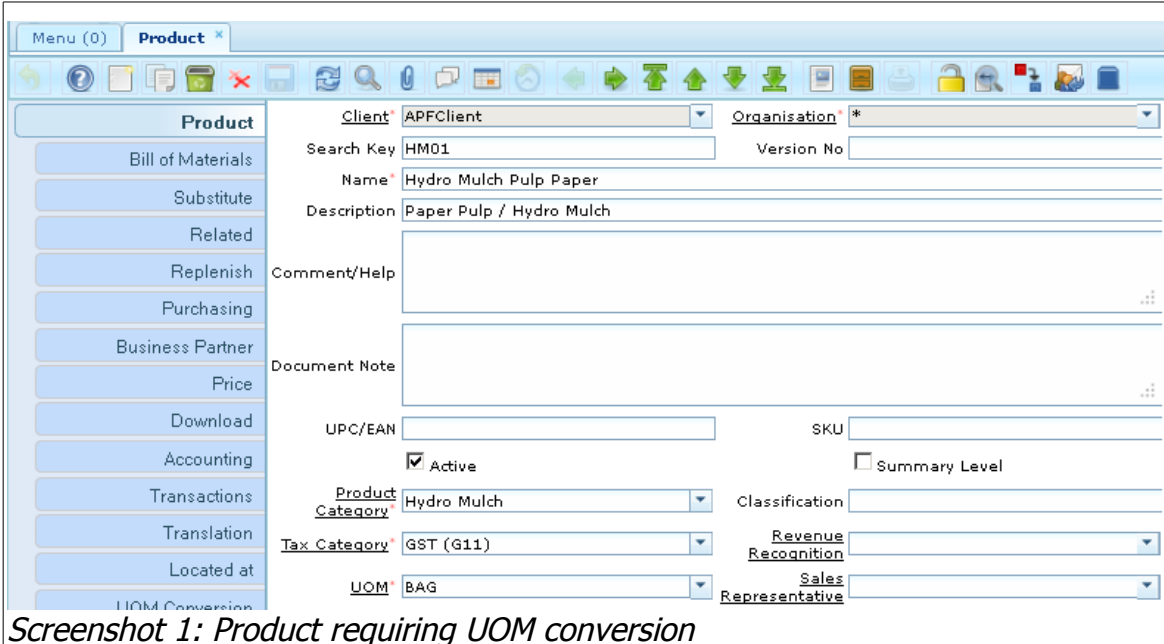
# 1 Unit of measure Conversions

## 1.1 What is a UOM Conversion?

A product may have a base unit of measure of 'each' or 'bag' but on some occasions you may wish to sell it by the 'tonne' or 'cubic metre'. Adempiere allows you to do this without having to create a separate product. In fact adding a separate product should be avoided since it complicates understanding of business and production planning.

## 1.2 Creating a UOM Conversion

An example of a product requiring a UOM conversion is shown below:

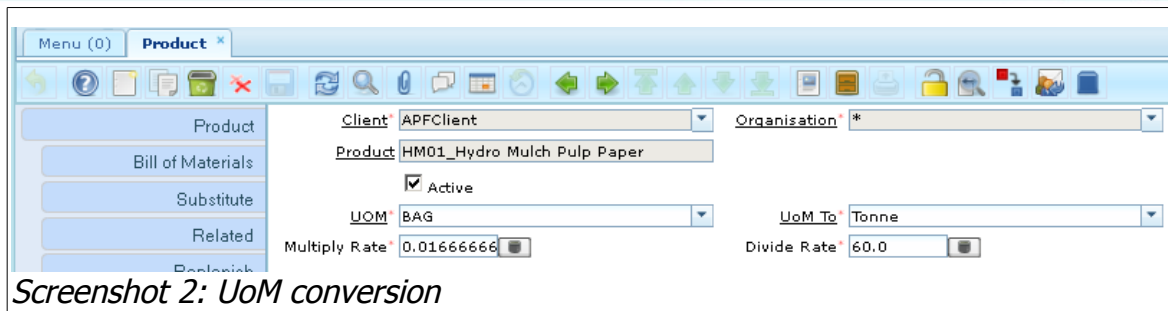


The screenshot shows the 'Product' form in Adempiere. The 'UOM' field is set to 'BAG'. The 'Product Category' is 'Hydro Mulch'. The 'Tax Category' is 'GST (G11)'. The 'Active' checkbox is checked. The 'Summary Level' checkbox is unchecked. The 'Revenue Recognition' and 'Sales Representative' fields are empty. The 'UPC/EAN' and 'SKU' fields are also empty. The 'Client' is 'APFClient' and the 'Organisation' is '\*'. The 'Search Key' is 'HM01' and the 'Version No' is empty. The 'Name' is 'Hydro Mulch Pulp Paper' and the 'Description' is 'Paper Pulp / Hydro Mulch'. The 'Comment/Help' and 'Document Note' fields are empty.

*Screenshot 1: Product requiring UOM conversion*

The products base unit of measure is BAG but the product is also sold by the TONNE.

A UOM conversion has been created as follows:



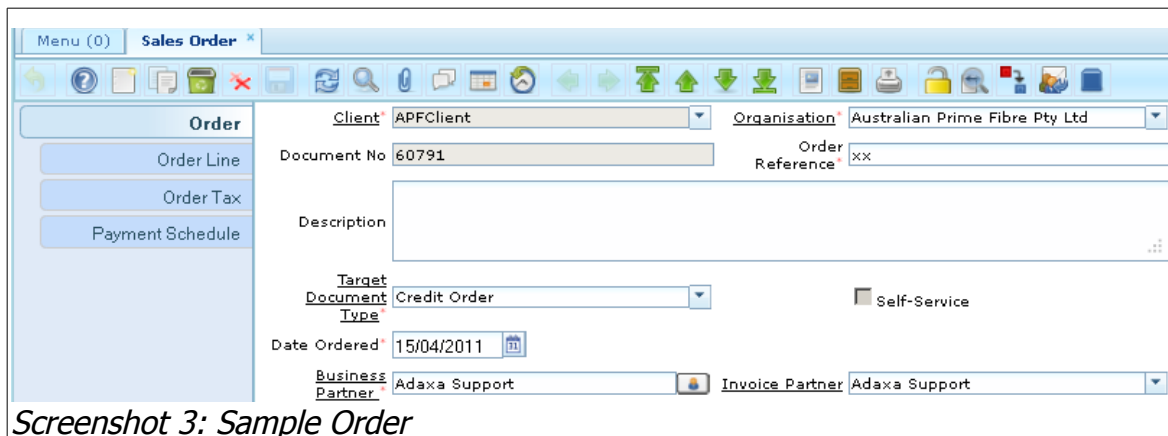
*Screenshot 2: UoM conversion*

Note that it is easy to enter the multiply/divide rate around the wrong way. It is easy to get right if you remember that to go from a small UOM to a large UOM (e.g. from bag to tonne) the divide value will always be greater than "1".

The UOM Conversion is entered on the UOM conversion tab on the Product window.

### 1.3 Example Order with a UOM Conversion

The following example order was created



*Screenshot 3: Sample Order*

and an order line for product HM01 was added:

Menu (0) Sales Order

Client: APFClient Organisation: Australian Prime Fibre Pty Ltd

Order: 60791\_2011-04-15 00:00:00

Line No: 10

Product: HM01\_Hydro Mulch Pulp Paper Charge: [Dropdown]

Project: [Dropdown] Dept: [Dropdown]

Attribute Set Instance: [Dropdown] Resource Assignment: [Dropdown]

Description: [Text Area]

**Quantities**

Quantity: 1 UOM: BAG

**Amounts**

Price: 15.60 Unit Price: 15.60 List Price: 15.60

Tax: GST Sale at 10% Discount %: 0.0

Screenshot 4: Order line displaying available UOMs

by clicking on the UOM field BEFORE saving the line you can select a UOM of either BAG or Tonne. If you select TONNE and enter qty of "1" the price is changed in the order as shown below:

Menu (0) Sales Order

Client: APFClient Organisation: Australian Prime Fibre Pty Ltd

Order: 60791\_2011-04-15 00:00:00

Line No: 10

Product: HM01\_Hydro Mulch Pulp Paper Charge: [Dropdown]

Project: [Dropdown] Dept: [Dropdown]

Attribute Set Instance: [Dropdown] Resource Assignment: [Dropdown]

Description: [Text Area]

**Quantities**

Quantity: 1 UOM: Tonne

Ordered Quantity: 60

**Amounts**

Price: 936.00 Unit Price: 15.60 List Price: 15.60

Tax: GST Sale at 10% Discount %: 0.0

Screenshot 5: Order line with UOM conversion

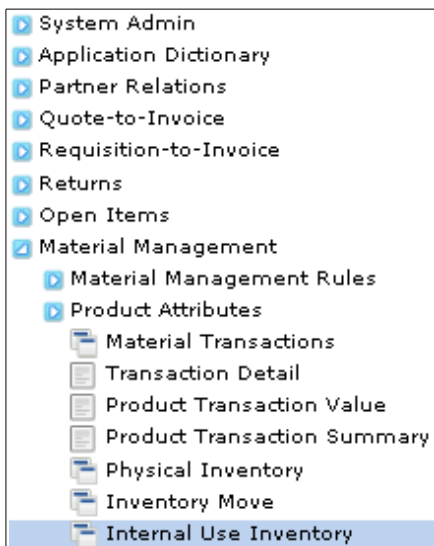
The order now shows that this line is for 1 tonne which equals 60 bags and the converted price per tonne is \$936. This price has been calculated by multiplying the bag price on the price list by 60 since this is the multiple defined in the UOM conversion.

## 1.4 Adjusting for Weight and Volume Differences

The example order above shows that we sold 1 tonne of HM01 and the system converted the quantity to 60 bags. Due to moisture content and other differences it may be that the actual number of bags making up the 1000 Kgs was 61 or 59. In order to get the inventory correct you may need to do a further adjustment if the variance is significant. If it is small it may be sufficient to allow for it to be corrected at the next stocktake.

### 1.4.1 Internal Use Inventory Window

If you need to adjust the quantity immediately then you can do so using the Internal Use Inventory window



Create an Internal Use Inventory record. In the Line, select the product HM01 and enter the number of extra bags to be written off or added back to inventory. Enter a description that links it to the sales order concerned.

**Internal Use**

Client: APFClient Organisation: Australian Prime Fibre Pty Ltd

Document No: 620016

Description: adjsut bulk issue on SO 12345 HM01

Warehouse: 1 Childers Factory

Movement Date: 15/04/2011 Document Type: Physical Inventory

**Reference**

Project: Dept:

**Status**

Approved Approval Amount: 0.00

Document Status: Drafted Complete

*Screenshot 6: Internal Use Inventory*

With a line like:

**Internal Use Line**

Phys.Inventory: 620016

Line No: 10

Locator: factory

Product: Hydro Mulch Pulp Paper

Search Key:

Attribute Set Instance:

Description: bulk issue overage 1 bag - SO 1234

Internal Use Qty: 1 UOM: Each

Charge: Bulk Issue Gain/Loss

*Screenshot 7: Internal Use Inventory Line*

If a Charge like "Bulk Issue Gain/Loss" does not exist then have one created and point it to a general ledger account code in the cost of sales area of the chart of accounts (it will start with "5")

Select the Charge "Bulk Issue Over/Under" and then complete the document.

**NOTE:** Internal Use inventory requires that a **positive** number of 'bags' be entered to reduce the inventory and a **negative** number to increase inventory.



## 1.5 Other Uses for UOM Conversion

UOM conversion can also be used to overcome differences between supplier and customer descriptions of ordering units.

For example, with the implementation of EDI orders from Bunnings it was noted that while APF referred to the product unit as a "Bag", Bunnings used the unit of "Each". As it was necessary for invoices to be raised for Bunnings using their unit of measure ("Each") a 1:1 UOM conversion was set up for each of the Bunnings products, effectively allowing the two names to be used interchangeably.

## 2 Adaxa's Offices and Contacts

Information of a general nature about Adaxa and its services can be found at [www.adaxa.com](http://www.adaxa.com) or obtained by sending an email to [info@adaxa.com](mailto:info@adaxa.com) with a description of the information that you would like to receive. If you are an existing client and wish to initiate a request for software support please send an email to [helpdesk@adaxa.com](mailto:helpdesk@adaxa.com) with as much detail as possible about the nature of your support request.

For all other information please contact the Adaxa office nearest to you.

### 2.1 Australia

Address: Level 1, 616 St Kilda Road, Melbourne, Victoria, 3101, Australia

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### 2.2 New Zealand

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- 888.575.1489 Fax