

Adaxia



UOM Conversion

DOCUMENT SUMMARY SHEET

Document Type:	How To
Document Title:	UOM Conversion
Document Summary:	
File Name:	HowTo UOMconversion2.odt
Created on:	Friday, 15 April 2011
Created by:	ssackett
Last Modified on:	Friday, 15 April 2011
Last Modified by:	ssackett

NOTES

- 1. Responsibility is disclaimed for any loss or damage (including but not limited to damage resulting from the use by the client of the document) suffered by any other person for any reason at all including but not limited to negligence by ADAXA Pty Ltd (ADAXA).***
- 2. Whilst this document is accurate to the best of our knowledge and belief, ADAXA cannot guarantee the completeness or accuracy of any description or conclusions based on the supplied information.***
- 3. The recommendations contained in the document are advisory and ADAXA has no responsibility for the management or operation of any recommendations that may be implemented by the client.***
- 4. This document is licensed under the terms shown at <http://creativecommons.org/licenses/by-nc-nd/3.0/au/legalcode>.***

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

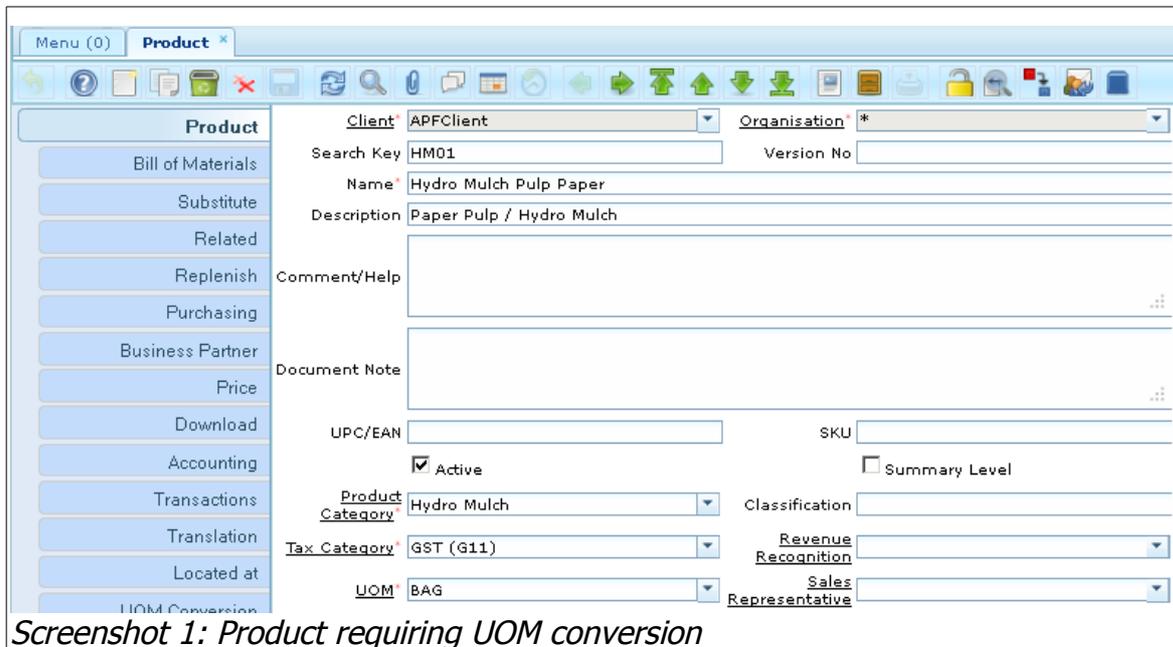
1 Unit of measure Conversions

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:

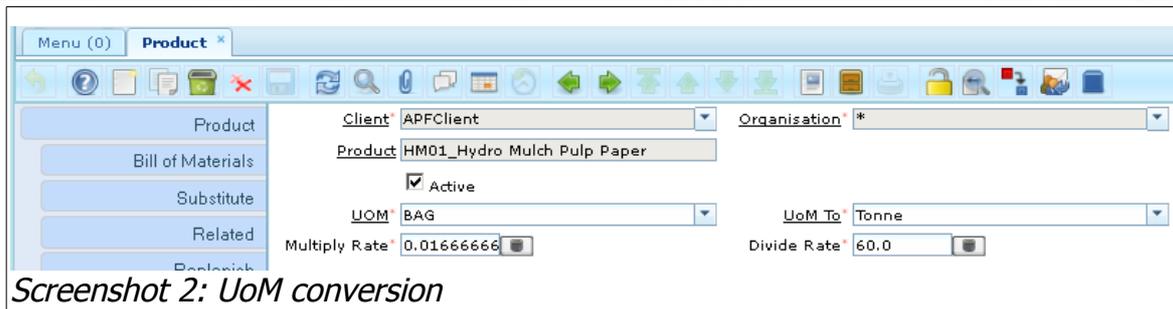


The screenshot shows the 'Product' form in Adempiere. The 'UOM' field is set to 'BAG'. The 'Product Category' is 'Hydro Mulch' and the 'Tax Category' is 'GST (G11)'. The 'Name' is 'Hydro Mulch Pulp Paper' and the 'Description' is 'Paper Pulp / Hydro Mulch'. The 'Active' checkbox is checked. The 'UOM Conversion' option is visible in the left sidebar.

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:



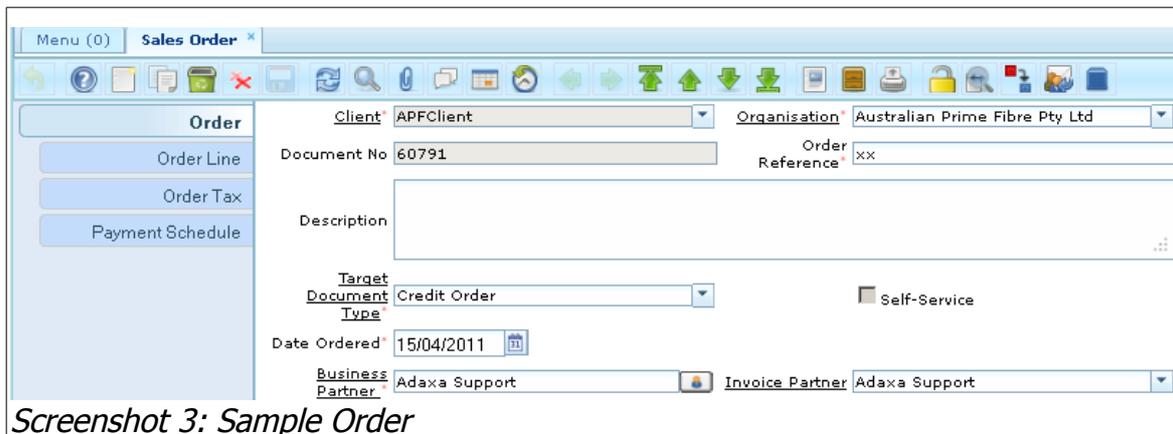
Screenshot 2: UoM conversion

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

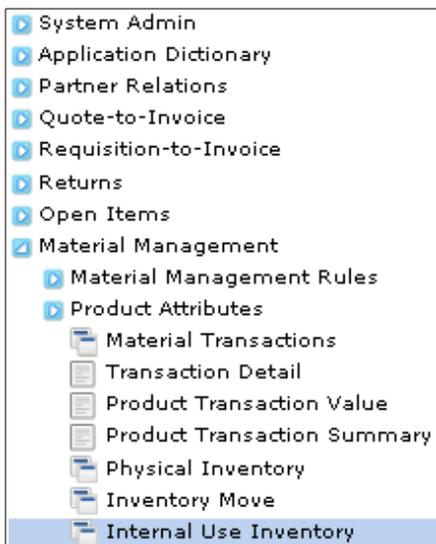
The order now shows that this line is for 1 tonne which equals 60 bags and the converted price per tonne is \$936. This price has been calculated by multiplying the bag price on the price list by 60 since this is the multiple defined in the UOM conversion.

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.

Menu (0) Sales Order Internal Use Inventory Internal Use Inventory

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:

Menu (0) Sales Order Internal Use Inventory Internal Use Inventory

Client: APFClient Organisation: Australian Prime Fibre Pty Ltd

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 or obtained by sending an email to 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 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

Contacts: Office

- 1300 990 120 (Within Australia)
- +613 9510 4788 (Outside of Australia)

2.2 New Zealand

Address: 73 Boston Road, Mt Eden, Auckland, 1023, New Zealand

Contacts: Office

- 0800 232 922 (Within New Zealand)
- +649 9744 600 (Outside of New Zealand)

2.3 United States of America

Address: PO Box 6350 Oceanside, CA 92052-6350

Contact: Office

- 760.576.5115 Main
- 888.575.1489 Fax