USING AN ALTERNATE UOM TO CORRECT A UOM FACTOR ON AN ITEM WITH ACTIVITY

When you need to change a UOM conversion factor on an item **after** activity exists you can utilize an alternate UOM vs having to renumber and create a new item . For example, the vendor changed pricing a 4'x8' from nominal pricing (eg 4x8 = 32 sf) to actual pricing (eg 48"x 96" = 33 sf).

When using this option, you define a separate / similar UOM code for each costing factor (eg 32' vs 33').

Steps to Support this Option

1. Define a UOM code for the alternate UOM

Data Files > Item Information > UOM Codes

2. Define an UOM conversion factor for the alternate UOM

Data Files > Item Information > UOM Conversions

3. Add the new alternate UOM factor to the item

Data Files > Item Information > Items > display UOM conversion toolbar option

You can eliminate Step 2 by defining the new UOM conversion factor at the same time as adding the new UOM alternate UOM to the item.

4. Change the Cost UOM code on the item supplier record

Data Files > Item Information > Items > assigning item suppliers toolbar option

Example using a base item defined with a stocking and costing UOM of SH.

🦊 Item Maintenance [Central Branch Name] [v551 Devel] File Edit Options View Window Go To Help	– 🗆 X
Search by Item V plywood sfsh P Search C > >>	Branch CENTRALBRNCH
	Activate item in shared branches
Item PWCP Size 5/8" 4x8+ woodgrain comm pine pbc	
Item Misc Branch Branch Settings Reorder Info Inv Param Misc Param Tran Defaults Tally Defaults Form	Settings Misc Cost/Price WMS/Mobile
Product group major: 00 P Minor: 01 P Ext desc: 49 x 97 sca title vi compliant Price code major: 010 P Minor: 10 P	
Stocking UOM: SH	
Costing UCM: SH Parent BOM flags	ridden
Webste: Go Options included in price BOM print flags/settings Auto complete WO	e default
Work order: Work order type Other forms: Create reman	Sales order V
Component reman type	Q
Prompt to create	cross reference
Type: Sales project labor item	

UOM conversion previously set up for the standard conversion of SH to SH based on 32'.

Add Alternate UOM Conversion Factor to the Item

Add an alternate UOM for the oversized costing UOM (such as OMSF) and assign to a factor based on 33'.

Example:

Original Stocking to Costing UOM is SH to MSF based on 32'

Alternate UOM is based on Stocking to Costing of OMSF based on 33'

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48TH	OZ	48.000000000	There are 48	in an ounce						WM5 2;		
48TH	QT	1536.000000000	1536 48ths ir	n a Quart						WMS 3:		
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Define Cost UOM for Supplier

If you only have one primary supplier for the item define the new alternate Costing UOM on the item supplier record. If you have multiple suppliers assigned to the item and they are using different UOM factors, define the appropriate costing UOM factor to each item supplier record.

Example:

Primary Supplier assigned with the original Stocking UOM to Costing UOM factor.

🦻 Item Maintenance [Central Branch Name] [v551 D	evel]		—	\times
Item Suppliers [Central Branch Name] [v551 Devel]				Х
		[Branch CENTRALBRNCH	
Item: PWCP Size: 5/8"	1x8+	Description: woodgrain comm pine pbc		
Suppliers Maintenance Supplier Primary Supplier for This Item Supplier ID: ALL WOOD Ship-from: All Wood Supply Lilliwap WA 242	1	Supplier Item Reference Part #/UPC: Purpose Part # Part # Part # Print on Forms Print Supplier Cross Ref on Customer Form	ind UPC Code	
Factors Load: 1.0000 SH Load: 1.0000 Weight: 1.0000 SH Load: 1.0000 SH Load: I.0000 Weight Overridden Coat Overridden Coat Overridden Get Item's Weight Get Item's Item's Item's Item's Item's Item	SH dden oad	Supplier UOM Cost UOM: MSF Qty UOM: P Use for Order Qty in PO Entry Use for Order Qty on PO from SPO Use for Order Qty on Printed PO Use for Order Qty Remain on PO Check In List Use for Receiving Qty	Lead Time Days Update Lead Most Recent: 0 2nd Recent: 0 3rd Recent: 0 4th Recent: 0 5th Recent: 0	

For the additional suppliers requiring the alternate UOM, assign the Cost UOM based on the new alternate UOM.

🤜 Item Maintenance [Central Branch Name] [v551 Devel]	- 🗆 X
tem Suppliers [Central Branch Name] [v551 Devel]	Х
	Branch CENTRALBRNCH
Item: PWCP Size: 5/8" 4x8 + Suppliers Maintenance	Description: woodgrain comm pine pbc
Supplier Primary Supplier for This Item Supplier ID: 0523 Seq: 1	Supplier Item Reference Part #/UPC: Purpose Part # OPart # and UPC Code
Ship-from: Bear Wood Supply Fremont CA 645607898	Print on Forms
Factors Weight: 1.0000 SH Load: 1.0000 SH Weight: Image: Construction of the second se	Supplier UOM Lead Time Days Cost UOM: D Qty UOM: D Use for Order Qty in PO Entry 2nd Recent: Use for Order Qty on PO from SPO 3rd Recent: Use for Order Qty on PO from SPO 3rd Recent: Use for Qty Remain on PO Check In List 0 Use for Receiving Qty 5th Recent:

The system continues to use the standard costing UOM factor so you only need to define the Cost UOM value on the item supplier if different than the default costing UOM. For explanation purposes only, both records were defined above.

Impact on Purchase Order

For the Primary Supplier, when entering a PO the costing UOM of MSF is auto assigned.

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	📉 Purchase Or	der #440060336 for	r All Wood Supply [C	entral Branch Name	e] [v551 Devel]		
I.	File Edit Opti	ions View Wind	dow Go To Help				
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	L				-		
	PO ID 4400603	336	Status In Pr	rocess	Order date	04/19/21	Branch CENTRALBRNCH
	Header (F7) Deta	ail (F8)					
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	Item	Ordered qty Qty	y UOM Cost	Cost UOM Receive	d qty Msg Status	Size	Item description
1	PWCP	1.0000 SH	3,906.2500	MSF 0.	0000 Open	5/8" 4x8+	woodgrain comm pine pbc

For the additional supplier, the costing UOM of OMSF is auto assigned.

📂 Purchase	Order #440060337 D	etail Entry [C	entral Branch Nar	ne] [v551 [evel]		- C) X
Options								
Item	PWCP	2	5/8" 4x8+		woodgrain comm pine pbc			
On order	1.0000	SH	3,787.0818	/ OMSF	No discount	Ext cost	125.00	
Ext weight	1.00	Ext load	1.00		Options <u>C</u> ancel	<u>S</u> av	e	

When costing based on 'Last PO Cost' the system continues to reference last PO cost on both orders regardless of who is the primary supplier (unless item flag is set "update last PO cost for primary supplier only".)

🤍 Item Maintenance [Cen	tral Branch Name] [v552 Devel	0	– 🗆 ×
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Search by Item	~ рууср	Search <	Branch CENTRALBRNCH
		* 2. ** @ 1. ** ** *	Activate item in shared branches
Item PWCP	Size 5/8" 4x8+	woodgrain comm pine pb	DC
Item Misc Branch Branch Sett	ings Reorder Info Inv Param	Misc Param Tran Defaults Tally Defaults Fo	orm Settings Misc Cost/Price WMS/Mobile
Inventory costs			
Market cost:	0.0000 /SH	Fixed Last PO cost: 125.0	0000 /SH Fixed
Market cost formula:		✓ Update last PO cost for prin	nary supplier only
		Update last PO/Recv cost w	vhen order does not affect inventory
Last received landed cost:	133.0000 /SH	Last PO ID: 440060394	
Last received unit cost:	125.0000 /SH	PO cost default: Last PO cost	~
Misc cost/price and description			
Manufacturer Cost:	0.0000 /SH		
Replacement Cost:	0.0000 /SH		
Misc cost:	0.0000 /SH		
Retail:	0.0000 /SH		
Last Purchased Cost:	0.0000 /SH		

Only the costing UOM value changes to back into the factor. In the last example above, the costing value of \$3787.0818 OMSF was assigned.

Impact on Sales Order

The system continues to calculate average the same regardless of the alternate UOM assigned.

Item Detail Dimension Size 5/8" 4x8+ Ordered 1.0000 SH Available qty 4.0000 C Item desc woodgrain comm pine pbc Price 0.0000 SH Committed qty 1.0000 Item desc woodgrain comm pine pbc Ext price 0.000 BO 0.0000 H Force backorder GM %	Item Detail Dimension Size 5/8" 4x8+ Ordered 1.0000 SH Available qty 4.0000 SH Item desc woodgrain comm pine pbc Price 0.0000 SH Committed qty 1.0000 Item desc woodgrain comm pine pbc Ext price 0.000 SH Committed qty 1.0000 Item desc woodgrain comm pine pbc GM %	Item Detail Dimension Size 5/8" 4x8+ Ordered 1.0000 SH Available qty 4.0000 SH Item desc woodgrain comm pine pbc Price 0.0000 SH Committed qty 1.0000 Item desc woodgrain comm pine pbc Ext price 0.0000 SH BO 0.0000 V V V M4 % 0.0000 SH Committed qty 1.0000 SH V V M5 % 0.0000 SH Committed qty 1.0000 SH V V M5 % 0.0000 SH Committed qty 1.0000 SH V V M6 % -999.99 SH SH SH SH SH M6 % -999.99 SH SH SH SH SH M6 % -999.99 SH SH SH SH SH M6 % SH SH SH SH SH SH M6 % SH SH SH SH SH SH M6 % SH SH SH SH SH SH <	Item Detail Dimension Size 5/8" 4x8 + Ordered 1.0000 SH Available qty 4.0000 Item desc woodgrain comm pine pbc Price 0.0000 SH Committed qty 1.0000 Item desc woodgrain comm pine pbc Ext price 0.000 SH Committed qty 1.0000 F <th></th>																	
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MISC Notes

The system continues to report market costs in the default costing UOM. Even if you are no longer using the original costing UOM on purchases, the system continues to report everything in the original UOM which cannot be reassigned.

When you have a large number of items that need to be assigned the new alternate UOM, create a spreadsheet with the following columns (in this specific order):

Item, Factor, From, To

Then populate the records in the spreadsheet that you want to update with the new alternate UOM conversion factor and send to DMSi who can mass load the data for you.

To mass update the Cost UOM on the item supplier record for primary suppliers you can use the Item Import. To mass update the Cost UOM on the item supplier record for the non-primary suppliers, you can use the Item Mass Update. Using both options you need to have the alternate UOM conversion factor defined in the system before running the programs.

Consider this other option:

<u>AR825 – How to correct UOM factor on Item with activity – Renumbering an</u> <u>item</u>.