

# Multiple Units of Measure



April 1998 Revision • Item # H-UOM

## **Multiple Units of Measure**

### **Multiple Units of Measure**

© Copyrighted by D.D.M.S., Inc.  
Printed in the United States of America.

**DDMS, P.O. Box 507, Keller, TX 76248: 817-431-0668. Sales: 800-366-3367.  
Service: 800-366-4778. Fax: 817-431-0956**

# Contents

<b>Understanding Multiple Units of Measure .....</b>	<b>5</b>
Understanding the Conversion with an O/PUS Load .....	6
Understanding the Conversion for Existing Items .....	8
Before You Convert the Items .....	9
<b>Field Descriptions .....</b>	<b>11</b>
Fields in the (E) Screen .....	11
Field In the Master Record .....	11
UNIT .....	11
Fields in the Item Detail Screen .....	11
Unit .....	11
Qty .....	12
Multiple or Information .....	12
Field in the (LØ) Screen .....	13
Using Multiple UOM's for an Item .....	13
Fields in the (LGD) Screen .....	13
Default Order Entry Sell Unit Of Measure To Tracking Unit Of Measure .....	13
Enter Price For Multiple Unit Of Measure Items When Blank .....	14
Enter Cost For Multiple Unit Of Measure Items When Blank .....	14
Print Master Unit Of Measure Prices On Pick Tickets .....	14
Print Master Unit Of Measure Prices On Invoices .....	15
Enter Prices In Master Unit Of Measure Price .....	15
<b>What You Need to Set Up .....</b>	<b>15</b>
Setting the Parameter in the (LØ) Screen .....	16
Setting the Parameters in the (LGD) Screen .....	16
Running the Conversion .....	16
Converting O/PUS Items .....	17
Converting Existing Items to Multiple Selling Units .....	21
Converting Existing Items to Information Units .....	25
<b>Adding a New Item with Multiple Units .....</b>	<b>28</b>
<b>Choosing the Unit of Measure in Order Entry .....</b>	<b>31</b>
Example 1 .....	31
Example 2 .....	32
<b>Changing the Selling Unit on an Order .....</b>	<b>33</b>
<b>Changing the Shipped Quantity and Selling Unit on an Order .....</b>	<b>34</b>
<b>Viewing Usage Quantities for an Item With Multiple Selling Units .....</b>	<b>35</b>

**Multiple Units of Measure**

<b>Purchasing Items with Multiple Selling Units .....</b>	<b>37</b>
<b>Placing Items With Multiple Selling Units on a Purchase Order Using the Short-Buy .....</b>	<b>37</b>

## Understanding Multiple Units of Measure

So that you can maintain better inventory control, DDMS has always recommended that you buy and sell your items in one unit of measure—your buy unit. And for a strictly commercial dealer, this is the best method. But if you are a commercial dealer that also has a retail store, at times this method probably creates problems for you. With a retail store, there may be certain items that you break up and sell in a different unit than you buy the items. For example, you probably buy file folders by the box or carton. And on the commercial side, you only sell these items in a box or carton. This means that on the system, these items are listed with a box or carton as the selling unit. But you probably break down these items and sell them individually at your retail store. So if a customer wants to buy one file folder, you must manually calculate the price of the individual item so that you charge the customer the correct price at the retail store. To do this, you may have to check to see how many of the item are in the larger selling unit, so that you can break down the price for just one. That's why this new feature was added to the system—to simplify the sale of this type of items for our customers with retail stores.

You can use the new multiple units of measure feature in one of two ways.

First, you can set up these items with information units only. With this method, the system displays each of the available units any time you are ordering the item. The order-writer can use these as reference units so they know the relationship between the item's units. Then they can easily calculate the price of any of the units. But, you can only sell the item in the master unit set in the UNIT field in the Master Record.

Or second, you can set up your items with two selling units and one information unit. In this case, you can sell the item in the two selling units. The information unit, however, is for reference purposes only. Any time you are ordering the item, the system displays the two selling units, so you can choose between them. When you choose the selling unit, the system automatically calculates the correct price for the unit.

There are three ways that you can set up an item with multiple units of measure:

1. You can load the multiple units of measure for the items into your inventory database with an O/PUS load. Then you must run the (+EW) conversion program. This program converts the items to either an item with two selling units or an item with information units only.
2. You can use the (+EW) conversion program to set up the units of measure for existing items with a unit of measure that was not loaded with the O/PUS load

## Multiple Units of Measure

- You can manually add a new item record to the (E) Inventory Master screen and set it up with multiple units of measure. If you manually add a new item record to the (E) screen and set it up with multiple units of measure, you do not have to run the (+EW) conversion program.

**Warning:** You must call DDMS for authorization before you perform the (+EW) conversion.

DDMS recommends that you do not convert all the items in your database to multiple selling units. You should limit this conversion to specific items—only the items that you will sell in multiple units.

Also, once these items are converted to multiple selling units, the conversion is permanent. You should make a backup of your data files before you perform this procedure.

### Understanding the Conversion with an O/PUS Load

When O/PUS loads the multiple units, either the retail unit, list unit, or buy unit (depending on which unit you specify) loads as the master unit of measure in the UNIT field in the Master Record. This is the current selling unit for the item. The remaining units load in the third and fourth UNIT fields in the Multiple Units of Measure Record. The smaller of the remaining unit(s) loads in the third UNIT field and the larger (if one exists) loads in the fourth UNIT field, as shown in Figure 1.

However, you cannot sell these items in multiple units, or use these units for reference purposes, until you run the (+EW) conversion program. If you

**Figure 1: The Units of Measure for an Item After the O/PUS Load**

```

Item Detail Screen (03/27/98)
----- MASTER RECORD ----- COLUMNS RECORD -----
Item #00835          Co:N5C          Col. Type G/D :. Assort :... Col #.
Desc. :FLDR,HANG,RCYCLD,LTR,1/5,RD  Qty 1 :... %..... $.
Extended #00835          Unit :EX  Loc. Qty 2 :... %..... $.
Kit :   Lead :   Hr. :   Ser. :   [ 1] Qty 3 :... %..... $.
Weight : 4.130 UPC #035255008358      Qty 4 :... %..... $.
Category 1: 2: 3: 4:                  Qty 5 :... %..... $.
                                         Col. Cost $
----- DIRECT BUY ----- PRIMARY WHOLESALER [ 1] -----
Vendor ID :..... Taker :... Program :SPARCO Taker :
Who Chg :..... Created :..... Changed :OPUS Created :OPUS
L.Change :.../... L.Update :.../... L.Change: / / L.Update :03/13/98
Weight :..... UPSable :. Eff. On : / / Ending On : / /
Cost $..... Cost $ 7.470 Wt. : UPS :
----- PRICING RECORD [ 1] ----- UNITS OF MEASURE -----
Net :N Up Cost % Max % Con % Unit Qty EDI Use Only M/D
Cost $ 7.470 List $ 18.090 58.7% [ ] [ ] [ ] [ ] [ ] [ ]
----- Hazard Forms ----- [ ] [ ] [ ] [ ] [ ] [ ]
OSHA Y/N ?[.] Form # [.....] [EA] [ 25] [ ] [ ] [ ] [ ]
DOT Y/N ?[.] Form # [.....] [CT] [ 250] [ ] [ ] [ ] [ ]
                                         Multiple or Information M/I :O
-----
Press Any Key to Continue

```

are going to convert items to multiple selling units, before you run the conversion, you should determine which items you want to convert. To do this, you can view the items in the Item Detail screen. The available selling units for an item are shown in the UNIT field in the Master Record and the third UNIT field in the Units of Measure Record. For example, the available selling units for the item shown in Figure 1 are boxes (BX) and eaches (EA). Any unit shown in the fourth UNIT field in the Units of Measure Record is for information purposes only. In Figure 1, the carton (CT) unit can only be used for information or reference purposes only.

When you run the conversion program, you select the item(s) that you want to convert. You can limit the conversion to specific items or a range of items by setting limits. You also define whether the units for these items are selling units or information units (for reference only). Then you base the conversion on the units that O/PUS loaded for each item and the conversion will make the following changes:

1. Moves the units that were loaded by O/PUS (located in the third and fourth UNIT fields) to the first and second UNIT fields in the Multiple Units of Measure Record in the Item Detail screen, as shown in Figure 2.
2. Marks the units as either multiple selling units or information units, depending on which one you specify. Enters an **M** (for selling units) or an **I** (for information units) in the MULTIPLE OR INFORMATION field in the Units of Measure Record in the Item Detail screen. If the item is set to **I** for information units only, no other changes are made to the item record.

**Figure 2: The Units of Measure Record After the (+EW) Conversion**

```

Item Detail Screen (03/27/98)
----- MASTER RECORD ----- COLUMNS RECORD -----
Item #00835          Co:N5C          Col. Type G/D :. Assort :... Col #.
Desc. :FLDR,HANG,RCYCLD,LTR,1/5,RD  Qty 1 :... %..... $.
Extended #00835          Unit :BX  Loc. Qty 2 :... %..... $.
Kit :   Lead :   Hr. :   Ser. :   [ 1] Qty 3 :... %..... $.
Weight : 4.130 UPC #035255008358    Qty 4 :... %..... $.
Category 1:  2:  3:  4:              Qty 5 :... %..... $.
                                      Col. Cost $
----- DIRECT BUY ----- PRIMARY WHOLESALER [ 1] -----
Vendor ID :..... Taker :.... Program :SPARCO Taker :
Who Chg :..... Created :..... Changed :OPUS Created :OPUS
L.Change :.../.../... L.Update :.../.../... L.Change: / / L.Update :03/13/98
Weight :..... UPSable :. Eff. On : / / Ending On : / /
Cost $..... Cost $ 7.470 Wt. : UPS :
----- PRICING RECORD [ 1] ----- UNITS OF MEASURE -----
Net :N Up Cost % Max % Con % Unit Qty EDI Use Only M/D
Cost $ 7.470 List $ 18.090 58.7% [EA] [ 25] [ ] [ ] [ ]
----- Hazard Forms ----- [CT] [ 250] [ ] [ ] [ ]
OSHA Y/N ?[.] Form # [.....] [ ] [ ] [ ] [ ] [ ]
DOT Y/N ?[.] Form # [.....] [ ] [ ] [ ] [ ] [ ]
Multiple or Information M/I :M
-----
Press Any Key to Continue
    
```

## Multiple Units of Measure

3. If the item is set to **M** for selling units, the system compares the master unit set in the UNIT field in the Master Record to the unit set in the UNIT field in the Units of Measure Record. The larger selling unit must be set in the UNIT field, for the system to calculate the quantities for an item with multiple selling units. If the larger selling unit is already set as the master unit, no change is made. If, however, the smaller selling unit is set as the master unit, the system automatically converts this to the larger unit. The smaller selling unit is placed in the first UNIT field in the Units of Measure Record. This is the tracking unit of measure.
4. If it was necessary to change the master unit to the larger unit, the system converts all cost and list prices for the item to reflect the price of the new master unit. Converts the cost and list prices for the item in the I-PRICE, I-WHL, I-COLUMNS, I-MFG, I-CAT, VENDOR CONTRACTS and CONTRACTS files according to the master unit of measure. This means that all pricing for the item is based on the larger unit of measure. If the master unit was not changed for the item, no changes are made in these files.
5. The system converts the quantities in the files I-COLUMNS, VENDOR CONTRACTS and CONTRACTS. If it was necessary to change the master unit to the larger unit, the system also converts the quantities in the files I-AUX and I-HISTORY.

### Understanding the Conversion for Existing Items

If you want to set up an existing item with multiple units, and the multiple units were not loaded with an O/PUS update, you can do this with the (+EW) conversion program.

When O/PUS loads the multiple units, a flag is set that tells the system the relationship between the two selling units (which is the larger selling unit and which is the smaller selling unit). But when you convert existing items, you must define the units. The system does not know which unit is the larger or smaller unit. The conversion program will convert the item to any unit(s) that you specify. For this reason, you must be very careful when defining the units for an item.

If you correctly set up the units when running the (+EW) conversion program, the conversion makes the following changes:

1. Places the smaller selling unit in the first UNIT field in the Units of Measure Record in the Item Detail screen. This is the tracking unit of measure for the item. Any other units you may enter for reference purposes are placed in the other UNIT fields in the Multiple Units of Measure Record.
2. Marks the units as either multiple selling units or information units, depending on which one you specify. Enters an **M** (for selling units) or an **I**

## Multiple Units of Measure

(for information units) in the MULTIPLE OR INFORMATION field in the Multiple Units of Measure Record in the Item Detail screen. If the item is set to **I** for information units only, no other changes are made.

3. If the item is set to **M** for selling units, the system checks the master unit set in the UNIT field in the Master Record. The larger selling unit must be set in the UNIT field, for the system to calculate the quantities for an item with multiple selling units. If the larger selling unit is already set as the master unit, no change is made. If, however, the smaller selling unit is set as the master unit, the system automatically converts the smaller unit to the larger unit. The smaller unit is placed in the first UNIT field in the Units of Measure Record in the Item Detail screen.
4. If it was necessary to change the master unit to the larger unit, the system converts all cost and list prices for the item to reflect the price of the new master unit. Converts the cost and list prices for the item in the I-PRICE, I-WHL, I-COLUMNS, I-MFG, I-CAT, VENDOR CONTRACTS and CONTRACTS files according to the master unit of measure. This means that all pricing for the item is based on the larger unit of measure. If the master unit was not changed for the item, no changes are made in these files.
5. Converts the quantities in the files I-COLUMNS, VENDOR CONTRACTS and CONTRACTS. If it was necessary to change the master unit to the larger unit, the system also converts the quantities in the files I-AUX and I-HISTORY.

### Before You Convert the Items

As mentioned earlier, before you convert the items with the (+EW) conversion program, you must call DDMS for authorization. However, before you decide to use this feature, there are several things that you should consider.

1. You should not convert your entire inventory database to sell with multiple units. This program is meant to be used with only a few select items that you sell in two units.
2. This conversion is permanent. If you want to convert your items back, the only way to do so is with a recent backup.
3. This conversion is a highly dedicated function. There should be no other activity on the system; therefore, you should not run this conversion during your normal business hours.
4. If any of the items that you want to convert are on a contract with quantity breaks, the conversion program may not be able to convert these contracts to multiple selling units. If the conversion program cannot calculate a whole number for the price (because of the quantity breaks), the contract price will not be converted. The conversion program will not

## Multiple Units of Measure

round the price. Also, if an item is on a contract with a quantity break of one, the system may not convert the item price on the contract. When the system factors the price for the quantity break of one, if this price does not equal the price you have set in the contract for the quantity break of one, the system will not convert the price. In this case, you may have to go to the (ET) Inventory Contract Price screen and change the price manually.

Any items that cannot be converted are printed on the Exceptions Report after the conversion, with an explanation as to why the item was not converted.

5. If you are going to convert items, you should be aware that some of your reports may not print the unit of measure information.

If you specify **Y** in the USING MULTIPLE UOM'S FOR AN ITEM field in the (LØ) Global Master Parameters screen, the classic reports in the (TR) Order Entry Reports, (RR) Inventory Reports, (SR) Purchase Order Reports, (PR) Vendor Reports, and (UR) Sales Reports screens will include the multiple unit of measure.

However, if you use any reports that subtotal by item in the (T) Order Entry Selectors, (R) Inventory Selectors, (S) Purchase Order Selectors, (P) Vendor Selectors, or (U) Sales Selectors screens, these reports may have to be modified through Report Writer to include the unit of measure information. These includes the following reports: invoices, pick tickets, open pick reports, and short buy reports.

6. As stated earlier, if you load the multiple units of measure with an O/PUS load, a flag is set that tells the system the relationship between the two selling units (which is the larger or smaller selling unit). But when you convert existing items, you must define the units for the items. If you do not set up the units correctly, the pricing for the item may be factored incorrectly. For details on defining the units, see the heading **Converting Existing Items to Multiple Selling Units**.
7. After you convert the items, there may be some items for which your selling unit of measure is larger than the wholesaler's unit of measure. If this is the case, when you order from the wholesaler, the system will only let you order this item in multiples of your master unit. For example, if the item is set up with a box of 12 as the master unit and the wholesaler's unit is each, you can only order this item from the wholesaler in multiples of 12.
8. If any of your items have bar codes that indicate the unit of measure, you may have to modify the bar codes.

## Field Descriptions

Fields that affect the new multiple unit of measure feature are described below. We don't necessarily include every field you may encounter when using the new multiple units of measure feature, but we do include every field that affects how this feature will run. Reviewing these field descriptions before you begin may highlight options that you'll need to discuss with management.

### Fields in the (E) Screen

The following text describes the fields in the (E) screen that affect the multiple units of measure feature.

#### Field In the Master Record

The following text describes the field in the Master Record that affects the multiple units of measure feature.

##### **UNIT**

This field contains the master unit for the item. When O/PUS loads the units, either the retail unit, list unit, or buy unit (depending on which unit you specify) is loaded as the master unit of measure in the UNIT field in the Master Record.

If you run the (+EW) conversion program to convert this item to multiple selling units, this field should display the larger of the two selling units. All pricing in the (E) screen is based on the master unit.

### Fields in the Item Detail Screen

The following text describes the fields in the Units of Measure Record in the Item Detail screen that affect the multiple units of measure feature.

##### **Unit**

The four UNIT fields in the Units of Measure Record display the different units of measure for this item.

If you load the units with an O/PUS load, the system places the multiple units and quantities in the third and fourth UNIT and QTY fields.

After you run the conversion, the system moves the units and quantities to the first and second UNIT and QTY fields. If this item is set up with multiple selling units, the system displays the smaller selling unit in the first UNIT field. This is the tracking unit for the item. Any units specified in the other UNIT fields are for reference only.

##### **Qty**

## Multiple Units of Measure

For each UNIT field, there is a corresponding QTY field. The QTY field defines the number of this unit that is contained in the master unit.

For example, you may have an item with two units: box (BX) and carton (CT). If the carton is the master unit and there are five boxes in a carton, the system would display BX in the UNIT field and 5 in the corresponding QTY field.

### Multiple or Information

This field, shown in Figure 3, defines whether the item is set up with selling units, or information units only, according to the following:

- M** This item is set up with selling units. The master unit is set in the UNIT field in the Master Record in the (E) screen. The tracking unit is set in the first UNIT field in the Units of Measure Record in the Item Detail screen
- I** The multiple units set in the UNIT fields in the Units of Measure Record are for information or reference use only. This item can be sold only in the unit specified in the UNIT field in the Master Record in the (E) screen
- O** The multiple units were loaded with an O/PUS load, and the units have not been converted with the (+EW) conversion program.

### Field in the (LØ) Screen

**Figure 3: The MULTIPLE OR INFORMATION Field**

Item Detail Screen (03/27/98)									
MASTER RECORD					COLUMNS RECORD				
Item #00835	Co:ESS	Col. Type	G/D :	Assort :	Col #				
Desc. :FLDR,HANG,LGL,1/5,RD		Qty 1 :	%	\$					
Extended #00835	Unit :BX	Loc. Qty 2 :	%	\$					
Kit : Lead :	Hr. :	Ser. :	[ ] Qty 3 :	%	\$				
Weight :	UPC #078787935426		Qty 4 :	%	\$				
Category 1:	2:	3:	4:	Qty 5 :	%	\$			
				Col. Cost \$	9.850				
DIRECT BUY					PRIMARY WHOLESALER [ 1 ]				
Vendor ID :	Taker :	Vendor ID :	SPARCO	Taker :					
Who Chg :	Created :	Changed :	OPUS	Created :	OPUS				
L.Change :	/ /	L.Update :	/ /	L.Change :	/ /	L.Update :	03/13/98		
Weight :	UPSable :	Eff. On :	/ /	Ending On :	/ /				
Cost \$		Cost \$	7.470	Wt. :	UPS :Y				
PRICING RECORD [ 1 ]					UNITS OF MEASURE				
Net :N Up Cost	% Max	% Con	%	Unit	Qty	EDI Use Only	M/D		
Cost \$	7.470 List \$	18.090	58.7%	[..]	[.....]	[..]	[.....]	[.]	
Hazard Forms					[..]	[.....]	[..]	[.....]	[.]
OSHA Y/N ?[.]	Form # [.....]	[EA]	[.....]	[..]	[.....]	[.]	[.....]	[.]	
DOT Y/N ?[.]	Form # [.....]	[CT]	[.....]	[..]	[.....]	[.]	[.....]	[.]	
Multiple or Information M/I :O									

The following text describes the one field in the (LØ) screen that affects the multiple units of measure feature.

**Using Multiple UOM's for an Item**

In this field, specify whether you want the system to print multiple units of measure item information on inventory and sales reports. If you are going to convert items to sell with multiple units, you should specify **Y** in this field.

Enter your response according to the following:

- Y** Multiple units of measure information prints on sales and inventory reports in the (TR), (RR), (SR), (PR) and (UR) screens.
- N (default)** Multiple units of measure information will not print on sales and inventory reports.

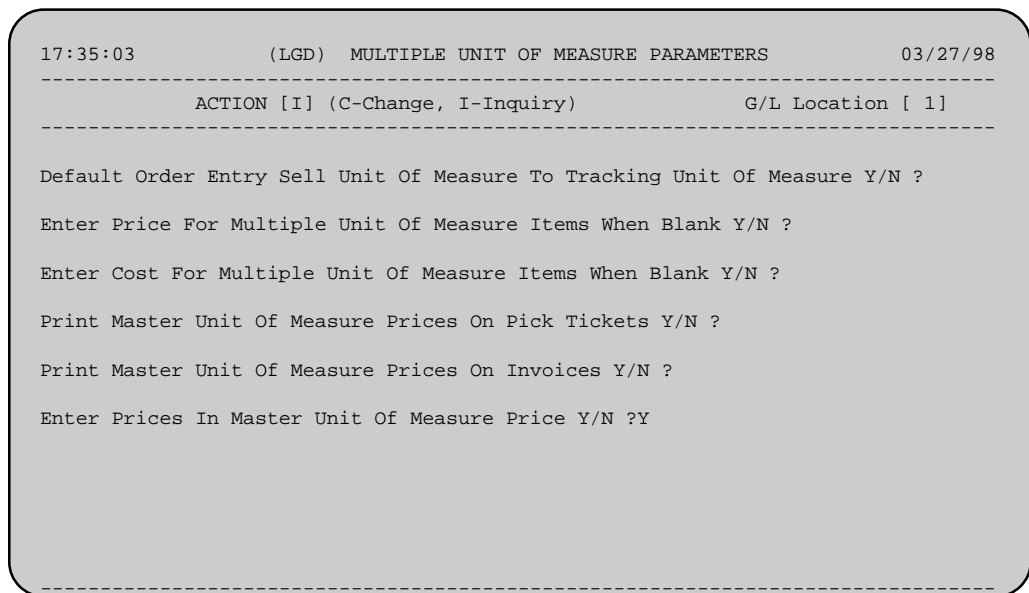
**Fields in the (LGD) Screen**

The following text describes the fields in the (LGD) Multiple Unit of Measure Parameters screen, shown in Figure 4.

**Default Order Entry Sell Unit Of Measure To Tracking Unit Of Measure**

In this field, you can set the default unit of measure for items in order entry. The system will display the unit of measure that you choose as the default in the Select Sell Unit Window in order entry. However, this is only the default. You can still choose to order the item in either the master or tracking unit of measure.

**Figure 4: The Parameters in the (LGD) Screen**



## Multiple Units of Measure

Enter your response in this field according to the following:

- N (default)** In order entry, the system will default to the master unit of measure. This is the larger unit of measure that is set in the UNIT field in the Master Record in the (E) screen
- Y** In order entry, the system will default to the tracking unit of measure. This is the smaller unit of measure that is set in the first UNIT field in the Units of Measure Record in the Item Detail screen.

### **Enter Price For Multiple Unit Of Measure Items When Blank**

In this field, specify whether you want the cursor to automatically move to the LIST field in order entry for multiple units of measure items that do not have a list price set in the (E) screen.

Enter your response in this field according to the following:

- N (default)** The cursor will not automatically move to the LIST field for multiple units of measure items that do not have a list price
- Y** The cursor will automatically move to the LIST field for multiple units of measure items that do not have a list price, so that you can enter a price for the item.

### **Enter Cost For Multiple Unit Of Measure Items When Blank**

In this field specify whether you want the cursor to move to the A COST field in order entry for multiple units of measure items that do not have a cost set in the (E) screen.

Enter your response in this field according to the following:

- N (default)** The cursor will not automatically move to the A COST field for multiple units of measure items without a set cost
- Y** The cursor will automatically move to the A COST field for multiple units of measure items without a set cost, so that you can enter a cost for the item.

### **Print Master Unit Of Measure Prices On Pick Tickets**

In this field, specify whether you want the system to print the master unit or the actual selling unit price on pick tickets for multiple unit of measure items.

Enter your response in this field according to the following:

- N (default)** The system prints the selling unit price that was chosen in order entry for multiple units of measure items
- Y** The system prints the master unit price on pick tickets for multiple units of measure items.

### **Print Master Unit Of Measure Prices On Invoices**

Use this field to specify whether you want the system to print the master unit or the selling unit price on invoices for multiple units of measure items.

Enter your response in this field according to the following:

- N (default)** The system prints the selling unit price that was chosen in order entry on invoices for multiple units of measure items
- Y** The system prints the master unit price on invoices for multiple units of measure items.

### Enter Prices In Master Unit Of Measure Price

If you place an item on an order that does not have a list price entered in the (E) screen, the system moves the cursor to the SELL field so that you can enter the correct price. But if this is an item with multiple selling units, you have to make sure that you enter the correct price for the unit you selected. For example, if you select the selling unit of each (EA), you must enter the price for the individual item. But if you enter a **Y** in this field, you can always enter the master unit and the system will automatically calculate the correct price for the selling unit you chose.

Enter your response in this field according to the following:

- N (default)** If you enter an item that does not have a price set in the (E) screen, you must enter the correct price for the selling unit you choose in order entry
- Y** If you order an item that does not have a price set in the (E) screen, and you enter the price for the master unit, the system automatically calculates the correct price for the selling unit you choose in order entry.

## What You Need to Set Up

Any feature that requires any type of setup is shown below. If you are going to use these features, you must first set them up. Next to each feature listed below is the heading that gives instructions for enabling it. There is also a reference to the heading that gives the field definitions, where appropriate.

1. The parameter in the (LØ) Global Master Parameters screen. See the heading **Setting the Parameter in the (LØ) Screen**.
2. The parameters in the (LGD) screen. See the heading **Setting the Parameters in the (LGD) Screen**.
3. Run the conversion program in the (+EW) screen. See the heading **Running the Conversion**.

## Multiple Units of Measure

### Setting the Parameter in the (LØ) Screen

Use the following instructions to set the parameters in the (LØ) screen.

- Step 1:** Go to the (LØ) screen and select the [C] Change action code.
- Step 2:** In the G/L LOCATION field, enter the location or press RETURN to accept the default.
- Step 3:** Press TAB until the cursor moves to the USING MULTIPLE UOM'S FOR AN ITEM field. In this field, specify whether you want the system to print multiple unit of measure information on sales reports.
- Step 4:** Press RETURN so that the cursor returns to the action code field. If you press ESC before doing so, the system will not save the changes.

### Setting the Parameters in the (LGD) Screen

Use the following instructions to set the parameters in the (LGD) screen.

- Step 1:** Go to the (LGD) screen and select the [C] Change action code.
- Step 2:** In the G/L LOCATION field, enter the location or press RETURN to accept the default.
- Step 3:** Press TAB to move the cursor from one field to the next and enter your responses. (For details on these fields, see the heading **Field Descriptions**.)
- Step 4:** When you complete all the fields in this screen, press RETURN to move the cursor back to the action code field. If you press ESC before doing so, the system will not save the changes.

### Running the Conversion

If you load the multiple units of measure with an O/PUS load or you want to change the multiple units of measure for an existing item or items, you must run the conversion program. Before you run the conversion program, however, you should make a backup of your data files.

For instructions on converting items from an O/PUS load, see the heading **Converting O/PUS Items**. For details on converting existing items to multiple selling units, see the heading **Converting Existing Items to Multiple Selling Units**. For details on converting existing items to information or reference units, see the heading **Converting Existing Items to Information Units**.

### Converting O/PUS Items

If you loaded multiple units of measure with an O/PUS load, you can use the following instructions to run the conversion:

- Step 1:** Go to the (+E) Special Item Screen and select the [W] Multiple Units of Measure option.
- Step 2:** In the BY ITEM field, specify whether you want to make the changes one item at a time. DDMS strongly recommends that you specify **Y** in this field, as shown in Figure 5. Enter your response according to the following:
- Y**      The system displays the items that fall within all the limits that you set, one at a time, so that you can view and confirm the conversion before any changes are made
- N**      The system converts all the items that fall within all the limits that you set at one time.
- Step 3:** The system displays the Special Item Selector screen. In the Special Item Selector screen, you limit the items that you want to convert by entering a range to include in the conversion. You can limit by any of the fields in this screen. You enter the beginning of the range(s) in the FROM fields on the left side of the screen and the end of the range(s) in the TO fields on the right side of the screen.

**Figure 5:**  
Specifying to  
Run the  
Conversion One  
Item at a Time

```

17:35:33                (SPE) SPECIAL ITEM SCREEN  REV. (03/03/98)                03/27/98
-----
A - Set Cost and/or Prices                L - Mass Inquire
B - Copy Dir to Whl                      M - Reset I-Price Contract
C - Copy Whl to Dir                      N - Set Maximum Discount
D - Copy Column Pricing by Location       O - Set Minimum/Maximum
E - Delete Supplemental Files            P - Set Class
F - Zero On Hand Quantities             Q - Copy Bins
G - Clear Hits                          R - EOQ
H - Clean Aux                           S - Convert Customer Item List
I - Move Locations                      T - UPC Update
J - Mass Change                         U - Reset OnHand/Alloc. From Bins
K - Mass Delete                         V - Quick Item Change
                                         W - Multiple Units of Measure

                                ACTION [W]
                                BY ITEM [Y]
-----

```



- Step 5:** At the ARE YOU SURE prompt, type **Y** to continue. If you specify **N** at this prompt, the system returns to the (+E) screen so that you can begin again.
- Step 6:** In the CREATE BASED UPON O/PUS UPDATE field, type **Y**, as shown in Figure 6. The system will use the units and quantities from the O/PUS update as the units of measure for the items.
- Step 7:** In the PRINTER field, enter the logical name of the printer or press RETURN to accept the default. After the conversion is complete, the system will print out a list of any items that fall within your limits but were not converted.
- Step 8:** In the I-MASTER UNIT OLD field, enter the old master unit for the items that you want to convert, as shown in Figure 7. This is the master unit that is currently set in the UNIT field in the Master Record in the (E) screen. Along with the limits you may have set in the Special Item Selector screen, this field also acts as a limit. For example, if you enter **EA** in this field, the system converts only the items with a master unit of each that also fall within the limits you set in the Item Selector screen.
- Step 9:** After you enter the old master unit, the cursor moves to the I-MASTER UNIT NEW field. What you enter in this field depends

**Figure 7:**  
Specifying the  
Old Master Unit

```

17:35:45          (SPE) SPECIAL ITEM SELECTOR SCREEN REV. (03/03/98)          03/27/98
-----
VENDOR      ITEM NUMBER      COLOR      DESCRIPTION      C N UNT CART      PRICE
-----
Create Based Upon O/PUS Update Y/N ?Y
Printer ?Pl
I-Master Unit
 Old      New      M      U      L      T      I      P      L      E      S      Qty      Multiple
-----
[ BX ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
[ .. ]    [ .. ]    1) ..      ..      ..      2) ..      ..      ..      3) ..      ..      ..      4) ..      ..      ?
-----

```

## Multiple Units of Measure

on where the larger unit is currently set for the item(s)— in the UNIT field in the (E) screen, or the first UNIT field in the Item Detail screen.

If the larger unit is currently set in the UNIT field in the (E) screen, press TAB and leave the I-MASTER UNIT NEW field blank.

If the larger unit is currently set in the first UNIT field in the Item Detail screen, enter the larger selling unit for the item(s).

**Step 10:** When the cursor moves to the MULTIPLE OR INFO field, specify whether you want the units to be selling units or information units only, according to the following:

- M** The system converts the units to selling units for each item that falls within the limits you set
- I** The system converts the units to information units for each item that falls with the limits you set.

**Step 11:** The cursor moves to the I-MASTER UNIT OLD field in the next row. You can continue to set up as many more multiple unit items as you like, using the above instructions. Remember that any limits that you set in the Special Item Selector screen will still apply.

**Figure 8: The Special Item Selector Screen**

```

17:36:19          (SPE) SPECIAL ITEM SELECTOR SCREEN REV. (03/03/98)          03/27/98
-----
VENDOR  ITEM NUMBER  COLOR  DESCRIPTION  C N UNT CART  PRICE
-----
                FROM                                TO
Item #[          ] Co:[          ] Item #[          ] Co.:[          ]
Desc :[          ] Desc. :[          ]
Dept :  Class :  Serial :          Dept :  Class :  Serial :
Unit :          Weight :          Unit :          Weight :
- - - - - DIRECT BUY - - - - -          - - - - - DIRECT BUY - - - - -
Vendor #          Prefix :          Vendor #          Prefix :
Eff. Date : / /          Eff. Date : / /
- - - - - WHOLESALER - - - - -          - - - - - WHOLESALER - - - - -
Vendor #          Prefix :          Vendor #          Prefix :

- - - - - PRICING - - - - -          - - - - - PRICING - - - - -
Dept :  Class :  Net :  Gross%      Dept :  Class :  Net :  Gross%
Column Type G/D :  Assort :          Column Type G/D :  Assort :

- - - - - AUXILIARY - - - - -          - - - - - AUXILIARY - - - - -
Bin P:   S:      Hits :          Bin P:   S:      Hits :
Source Location :__          Destination Location :__
-----

```

**Step 12:** When you have finished entering the units for all the items that you want to convert, press RETURN. The prompt ARE YOU SURE appears, along with the message YOU SHOULD HAVE A BACKUP OF FILES THAT WILL BE MODIFIED.

If you do not have a backup of your data files, type N. After you make a backup, you can begin the process again.

If you have a backup and you are ready to begin the process, type Y.

**Step 13:** If you specified N in the BY ITEM field, the system automatically converts the items. As it converts the items, the system scrolls through the records and displays the following information for each item: item number, company, description, class, and unit of measure. Any exceptions are sent to the printer. Go to **Step 16**.

If you specified Y in the BY ITEM field, the system displays the first item record that meets the limits you set, along with the PROCESS THIS RECORD prompt. The system also displays the following information for the item: item number, company, description, class, and unit of measure.

**Step 14:** At the PROCESS THIS RECORD prompt, specify whether you want the system to convert the multiple units of measure for the displayed item. Enter your response according to the following:

Y            Convert the units of measure for this item

N            Do not convert the units of measure for this item.

**Step 15:** After the item is converted, the system displays the next item that meets your limits and repeats the PROCESS THIS RECORD prompt.

**Step 16:** After the system displays all the items that meet your limits, the message END OF RECORDS ANY KEY TO CONTINUE appears. Press RETURN. The system returns to the (+E) Special Item screen.

### **Converting Existing Items to Multiple Selling Units**

If you want to set up an existing item with multiple selling units of measure, and you did not load the multiple units of measure with an O/PUS load, you can do this with the (+EW) conversion program.

Use the following instructions to set up an existing item with multiple units of measure:

**Step 1:** Go to the (+E) Special Item Screen and select the [W] Multiple Units of Measure option.

## Multiple Units of Measure

**Step 2:** In the BY ITEM field, specify whether you want to make the changes one item at a time. DDMS strongly recommends that you specify **Y** in this field. Enter your response according to the following:

- Y** The system displays the items that fall within all limits that you set, one at a time, so that you can view and confirm the conversion before any changes are made
- N** The system converts all the items at once that fall within all limits that you set.

**Step 3:** The system displays the Special Item Selector screen, as shown in Figure 8. In the Special Item Selector screen, you limit the items that you want to convert by entering a range to include in the conversion. You can limit by any of the fields in this screen. You enter the beginning of the range(s) in the FROM fields on the left side of the screen and the end of the range(s) in the TO fields on the right side of the screen.

If you do not want to set limits, press RETURN until the cursor moves to the SOURCE LOCATION field and go to **Step 4**.

The following text gives you instructions on limiting the items by direct buy vendor. However, the other limits are set in much the same way. If you need instructions on this screen, see the chapter on mass changing in *Book II: Inventory*.

**Figure 9:**  
Specifying the  
Smaller Unit of  
Measure for the  
Item

```

17:36:19          (SPE) SPECIAL ITEM SELECTOR SCREEN REV. (03/03/98)          03/27/98
-----
VENDOR      ITEM NUMBER      COLOR      DESCRIPTION      C N UNT CART      PRICE
-----
Create Based Upon O/PUS Update Y/N ?N
Printer ?P1
I-Master Unit      M      U      L      T      I      P      L      E      S      Multiple
  Old      New      Unit      Qty      Unit      Qty      Unit      Qty      Unit      Qty      Or Info
-----
[EA]      [BX]      1) EA      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....      ?
-----

```

## Multiple Units of Measure

- 1 Press TAB until the cursor moves to the VENDOR # field in the Direct Buy Record on the left side of the screen.
  - 2 To limit the items according to vendor number, enter the first vendor number that you want to include in the VENDOR # field.
  - 3 Press RETURN to move the cursor to the TO fields (the right side of the screen).
  - 4 Press TAB until the cursor moves to the Direct Buy Record.
  - 5 Enter the last vendor last vendor number that you want to include in the conversions in the VENDOR # field.
  - 6 Press RETURN to move the cursor to the SOURCE LOCATION field.
- Step 4:** After you enter the limits, the cursor moves to the SOURCE LOCATION field. In this field, enter the location where the items you are converting are located on your system and press RETURN. You must enter a location.
- Step 5:** At the ARE YOU SURE prompt, type Y to continue. If you specify N at this prompt, the system returns to the (+E) screen so that you can begin again.
- Step 6:** In the CREATE BASED UPON O/PUS UPDATE field, type N.
- Step 7:** In the PRINTER field, enter the logical name of the printer or press RETURN to accept the default. After the conversion is complete, the system will print out a list of any items that fall within your limits but were not be converted.
- Step 8:** In the I-MASTER UNIT OLD field, enter the old master unit. This is the master unit that is currently set in the UNIT field in the Master Record in the (E) screen. For example, if the item(s) that you want to convert have a master unit of each, you would enter EA.
- Step 9:** In the I-MASTER UNIT NEW field, enter the larger selling unit of measure. For example, if the larger selling unit of measure is box, you would enter BX.
- Step 10:** In the UNIT 1) field, enter the smaller selling unit of measure for this item. For example, if these items are sold individually and by the box, you would enter EA, as shown in Figure 9.
- Step 11:** In the QTY field, enter the quantity of this item that is contained in the larger selling unit. For example, if the larger selling unit is a box, and there are 12 of this item in a box, you would enter 12.

## Multiple Units of Measure

**Step 12:** You can use the remaining UNIT and QTY fields to enter any units that you want to use for reference. For example, if you want the system to display the unit of carton, you would enter CT in the UNIT field. Then in the QTY field, enter the quantity of this item that is contained in a carton. You can enter up to three additional units for reference. Press TAB to move to these fields.

**Step 13:** In the MULTIPLE OR INFO field, specify whether the units you entered are selling units or information units. Since you are setting up selling units, type **M**, as shown in Figure 10.

**Step 14:** The cursor moves to the next column in the I-MASTER OLD field. You can use this line to enter the information for the next items that you want to convert.

**Step 15:** When you have finished entering the information for all the items that you want to convert, press RETURN. The prompt ARE YOU SURE appears, along with the message YOU SHOULD HAVE A BACKUP OF FILES THAT WILL BE MODIFIED.

If you do not have a backup of your data files, type **N**. After you make a backup, you can begin the process again.

If you have a backup and you are ready to begin the process, type **Y**.

**Step 16:** If you specified **N** in the BY ITEM field, the system automatically converts the items. As it converts the items, the system scrolls through the records and displays the following information for

**Figure 10:**  
Specifying to  
Convert to  
Selling Units in  
the MULTIPLE  
OR INFO Field

```

17:36:19          (SPE) SPECIAL ITEM SELECTOR SCREEN REV. (03/03/98)          03/27/98
-----
VENDOR      ITEM NUMBER      COLOR      DESCRIPTION      C N UNT CART      PRICE
-----
Create Based Upon O/PUS Update Y/N ?N
Printer ?Pl
I-Master Unit      M      U      L      T      I      P      L      E      S
  Old      New      Unit      Qty      Unit      Qty      Unit      Qty      Unit      Qty      Multiple
-----
[EA]      [BX]      1) EA      12.... 2) CT      10.... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
[.]      [.]      1) ..      ..... 2) ..      ..... 3) ..      ..... 4) ..      .....
-----

```

each item: item number, company, description, class, and unit of measure. Go to **Step 19**.

If you specified **Y** in the BY ITEM field, the system displays the first item record that meets the limits that you set, along with the PROCESS THIS RECORD prompt. The system also displays the following information for the item: item number, company, description, class, and unit of measure.

**Step 17:** At the PROCESS THIS RECORD prompt, specify whether you want the system to convert the multiple units of measure for the displayed item. Enter your response according to the following:

- Y** Convert the units of measure for this item
- N** Do not convert the units of measure for this item.

**Step 18:** After the item is converted, the system displays the next item that meets your limits and repeats the PROCESS THIS RECORD prompt.

**Step 19:** After the system displays all the items that meet your limits, the message END OF RECORDS ANY KEY TO CONTINUE appears. Press RETURN. The system returns to the (+E) Special Item screen.

### Converting Existing Items to Information Units

If you want to set up an existing item with units of measure to use for reference only, and you did not load the multiple units of measure with an O/PUS load, you can do this with the (+EW) conversion program. The system displays the reference units in order entry, but you can only sell the items in the master unit of measure set up in the UNIT field in the (E) screen.

Use the following instructions to set up an existing item with multiple units of measure for reference:

**Step 1:** Go to the (+E) Special Item Screen and select the [W] Multiple Units of Measure option.

**Step 2:** In the BY ITEM field, specify whether you want to make the changes one item at a time. DDMS strongly recommends that you specify **Y** in this field. Enter your response according to the following:

- Y** The system displays the items that fall within any limits that you set, one at a time, so that you can view and confirm the conversion before any changes are made
- N** The system converts all the items at once that fall within



## Multiple Units of Measure

- 5 Enter the last vendor last vendor number that you want to include in the conversions in the VENDOR # field.
  - 6 Press RETURN to move the cursor to the SOURCE LOCATION field.
- Step 4:** After you enter the limits, the cursor moves to the SOURCE LOCATION field. In this field, enter the location where the items you are converting are located on your system and press RETURN. You must enter a location.
- Step 5:** At the ARE YOU SURE prompt, type **Y** to continue. If you specify **N** at this prompt, the system returns to the (+E) screen, so that you can begin again.
- Step 6:** In the CREATE BASED UPON O/PUS UPDATE field, type **N**.
- Step 7:** In the PRINTER field, press TAB. This field does not apply when creating information units.
- Step 8:** In the I-MASTER UNIT OLD field, enter the old master unit. This is the master unit that is currently set in the UNIT field in the Master Record in the (E) screen. For example, if the item(s) that you want to convert have a master unit of each, you would enter **EA**.
- Step 9:** In the I-MASTER UNIT NEW field, press TAB and leave this field blank.
- Step 10:** In the UNIT 1) field, enter the first unit of measure for the items. For example, if you want the system to display the unit box, enter **BX**.
- Step 11:** In the QTY field, enter the quantity of this item that is contained in the unit you just entered in the UNIT field. For example, if you entered **BX** in the UNIT field and there are 12 of this item in a box, you would enter **12**.
- Step 12:** You can use the remaining UNIT and QTY fields to enter any units that you want to use for reference, as shown in Figure 11. For example, if you want the system to display the unit of carton, you would enter **CT** in the UNIT field. Then in the QTY field, enter the quantity of this item that is contained in a carton. You can enter up to four units for reference. Press TAB to move to these fields.
- Step 13:** In the MULTIPLE OR INFO field, specify whether the units that you entered are selling units or information units. Since these units are for information only, type **I**.
- Step 14:** The cursor moves to the I-MASTER UNIT OLD field in the next

## Multiple Units of Measure

row. You can use this line to enter the information for the next items that you want to convert.

**Step 15:** When you have finished entering the information for all the items that you want to convert, press RETURN. The prompt ARE YOU SURE appears, along with the message YOU SHOULD HAVE A BACKUP OF FILES THAT WILL BE MODIFIED.

If you do not have a backup of your data files, type **N**. After you make a backup, you can begin the process again.

If you have a backup and you are ready to begin the process, type **Y**.

**Step 16:** If you specified **N** in the BY ITEM field, the system automatically converts the items. Go to **Step 19**.

If you specified **Y** in the BY ITEM field, the system displays the first item record that meets the limits that you set, along with the PROCESS THIS RECORD prompt. The system also displays the following information for the item: item number, company, description, class, and unit of measure.

**Step 17:** At the PROCESS THIS RECORD prompt, specify whether you want the system to convert the multiple units of measure for the displayed item. Enter your response according to the following:

**Y** Convert the units of measure for this item

**N** Do not convert the units of measure for this item.

**Step 18:** After the item is converted, the system displays the next item that meets your limits and repeats the PROCESS THIS RECORD prompt. Continue to respond to this prompt as you did earlier.

**Step 19:** After the system displays all the items that meet your limits, the message END OF RECORDS ANY KEY TO CONTINUE appears. Press RETURN. The system returns to the (+E) Special Item screen.

## Adding a New Item with Multiple Units

Use the following instructions to manually add a new item to your database and set it up with multiple units of measure. You can use these instructions for setting up multiple selling units, or for setting up multiple units for information or reference purposes only. Remember, if you manually add an item, you do not need to run the conversion program. If you need details on manually adding an item, see the chapter on manually adding an item record in *Book II: Inventory*.

**Step 1:** Go to the (E) screen and select the [A] Add action code.

## Multiple Units of Measure

- Step 2:** In the LOC field, enter the location or press TAB to accept the default.
- Step 3:** In the ITEM # field, enter the new item number.
- Step 4:** In the UNIT field of the Master Record, enter the unit of measure for this item. If you are setting this item up with two selling units, enter the larger of the selling units in this field. If you are setting this item up with information units, enter the unit of measure in which you sell this item.
- Step 5:** When you have completed all the fields in the (E) screen, the prompt CHANGE DETAIL SCREEN appears. Type Y to go to the Item Detail screen.
- Step 6:** In the Item Detail screen, enter any information that you want to include in the item's record. Press TAB to move ahead one field. Press RETURN to move ahead one record. For more information on the Item Detail screen, go to *Book II: Inventory*.
- Step 7:** In the UNIT fields in the Units of Measure Record, enter the units of measure. If you are setting this item up with selling units, enter the smaller of the units in the first UNIT field, as shown in Figure 12. If you are setting this item up with information units, enter any of the units that you want to use for reference in order entry.
- Step 8:** When the cursor moves to the corresponding QTY field, enter the number of this unit that is contained in the master unit.

**Figure 12:**  
Setting Up a  
New Item With  
Multiple Selling  
Units

```

Item Detail Screen (03/27/98)
----- MASTER RECORD ----- COLUMNS RECORD -----
Item #00889          Co:N5C          Col. Type G/D :. Assort :... Col #.
Desc. :FLDR,HANG,RCYCLD,LTR,1/5,WT  Qty 1 :... %..... $......
Extended #00835          Unit :BX  Loc. Qty 2 :... %..... $......
Kit :   Lead :   Hr. :   Ser. :   [ 1] Qty 3 :... %..... $......
Weight : 4.130 UPC #345435455008      Qty 4 :... %..... $......
Category 1:  2:  3:  4:                Qty 5 :... %..... $......
                                         Col. Cost $
----- DIRECT BUY ----- PRIMARY WHOLESALER [ 1] -----
Vendor ID :..... Taker :.... Program :SPARCO      Taker :
Who Chg  :..... Created :..... Changed :OPUS      Created :OPUS
L.Change :.../.../.. L.Update :.../.../.. L.Change: / /      L.Update :03/13/98
Weight :..... UPSable :. Eff. On : / /      Ending On : / /
Cost $..... Cost $ 7.470 Wt. :      UPS :
----- PRICING RECORD [ 1] ----- UNITS OF MEASURE -----
Net :N Up Cost % Max % Con % Unit Qty EDI Use Only M/D
Cost $ 7.470 List $ 18.090 58.7% [EA] [ 25] [ ] [ ] [ ] [ ]
----- Hazard Forms ----- [ ] [ ] [ ] [ ] [ ] [ ]
OSHA Y/N ?[.] Form # [.....] [ ] [ ] [ ] [ ] [ ] [ ]
DOT Y/N ?[.] Form # [.....] [ ] [ ] [ ] [ ] [ ] [ ]
Multiple or Information M/I :0
-----

```

## Multiple Units of Measure

For example, you may have an item with two units: box (BX) and carton (CT). If the carton is the master unit and there are five boxes in a carton, you would enter BX in the UNIT field and 5 in the corresponding QTY field.

**Step 9:** In the remaining UNIT and QTY fields, you can enter any other units and quantities for this item. If you are setting up this item with multiple selling units, any remaining units you enter are for reference only.

**Step 10:** In the MULTIPLE OR INFORMATION field, specify whether you are setting this item up with multiple selling units, or whether the units are for information only according to the following:

**M** This item is set up with selling units. The master unit is set in the UNIT field in the Master Record in the (E) screen. The tracking unit is set in the first UNIT field in the Units of Measure Record in the Item Detail screen

**I** The multiple units set in the UNIT fields in the Units of Measure are for information purposes only. This item can only be sold in the unit specified in the UNIT field in the Master Record in the (E) screen

## Choosing the Unit of Measure in Order Entry

After an item is set up with multiple units of measure, you can sell this item in

**Figure 13:**  
Specifying the  
Order Quantity

```

17:46:34                (G) Order Entry (03/02/98)                03/27/98
-----
Order Writer :SHAR      G/L Loc # 1  Inv Loc # 1      Transaction # -
Order          Order      C.O.D.          File :P-MASTER  Vol :W1
Name :CALAHAN SUPPLIES      Account #    10014
                               Slsm : 461  Status :A  P/O #
                               Lines #
KELLER          TX 76248      817          Sub-Total $
-----
#  Item      Mfg      Description      UM C Order  Ship  Price
00835      NSC  FLDR,HANG,RCYCLD,LTR,1/5,RD  BX Y 3
-----
                               |
                               | Select Sell Unit ( )
                               |-----|
                               | Unit      Qty
                               |-----|
                               | 1) :BX      :    1
                               | 2) :EA      :   25
                               |   :CT      :  250
                               |   :
                               |   :
Pref:WLJ  Unit:EA of |   :
Page#894  UNITED    O|
List 18.098
Dept [1]          Correct? Qty-Yes,N-No,O-Query,U-UC,A-Add,H-Hist,V-Ven

```

either of the selling units.

The following instructions give two examples of entering an item on the order. For clarity, we will use the following situation with these instructions: The customer wants to purchase folders. The item record for the folders is set up with two selling units: box (BX) and each (EA). There are 25 folders in a box.

**Example 1**

In this first example, the customer wants to order three individual folders.

**Step 1:** Go to the (G) screen and begin the order just as you normally do.

**Step 2:** When you retrieve an item that is set up with multiple selling units, the cursor moves to the ORDER field and the Select Sell Unit Window appears. At this point, you enter the quantity of the item that the customer is ordering, just as you normally do when placing an item on an order. Using the example, you would enter 3, since the customer is ordering three folders. See Figure 13.

Note that the system displays the master unit price in the PRICE field in Figure 13. This is the price of the larger unit, which is a box. However, when we choose the unit of each (EA) (Step 3), the system will adjust this to the price of an individual folder.

**Step 3:** After you enter the quantity, the cursor moves to the Select Sell Unit Window. This window displays the two selling units for the

**Figure 14:  
Specifying the  
Unit of Measure**

```

14:52:44                (G) Order Entry (03/02/98)                03/27/98
-----
Order Writer :SHAR      G/L Loc # 1  Inv Loc # 1      Transaction # -
Order          Order      C.O.D.          File :P-MASTER  Vol :W1
Name :CALAHAN SUPPLIES      Account #    10014
                               Slsm : 461  Status :A  P/O #
                               Lines #
                               Sub-Total $
KELLER                TX 76248          817
-----
#  Item      Mfg      Description      UM C Order  Ship  Price
00835      NSC  FLDR,HANG,RCYCLD,LTR,1/5,RD  EA Y    1    .72
-----
                               |-----|
                               | Select Sell Unit (2) |
                               |-----|
                               | Unit      Qty |
                               |-----|
                               | 1) :BX      :    1 |
                               | 2) :EA      :   25 |
                               |   :CT      :  250 |
                               |   :          :    : |
                               |-----|

List $      .724  Contract :      Discount :N 00.0%  Sell $      .724  G.P.  58.5%
P.Cost $    .299  A.Cost $    .299
Enter <ESC> to Change Shipped or P-Disc. Percent, L-List, C-Cost
    
```

## Multiple Units of Measure

item, as well as any information units. At this point, you enter the number that corresponds to the selling unit that you want to use. In this example, we are ordering three individual folders, so we would enter 2 to select the unit of each. Notice how the system adjusts the price so that it reflects the price of the two folders, as shown in Figure 14.

---

**Note:** The item shown in Figures 13 and 14 is set up with two selling units: each (EA) and box (BX). It is also set up with one information unit: carton (CT). You cannot sell this item by the carton. This unit is for reference only.

---

**Step 4:** After the system automatically adjust the price in the PRICE field to reflect the price of three individual folders, the cursor moves to the SELL field. You can complete this order just as you normally do.

### Example 2

We will use the same situation with these instructions. The customer wants to purchase folders. The item record for the folders is set up with two selling units: box (BX) and each (EA). There are 25 folders in a box.

But in this case, the customer wants to order three boxes of folders:

**Step 1:** Go to the (G) screen and begin the order just as you normally do.

**Step 2:** When you retrieve an item that is set up with multiple selling units, the cursor moves to the ORDER field and the Select Sell Unit Window appears. Since the customer is ordering three boxes of folders, you would enter 3 in the ORDER field.

**Step 3:** After you enter the quantity, the cursor moves to the Select Sell Unit Window. This window displays the two selling units for the item, as well as any information units. In this example, we are ordering boxes, so you would type 1 to choose the unit of (BX).

**Step 4:** We ordered 3 boxes, but there are not enough boxes on-hand to fill the order. In this case, the system displays the prompt HAVE (2 BX) & ( 3EA) ON HAND - CHANGE TO [EA]. At this prompt, you specify how you want to handle the order. Enter your response according to the following:

**Y** The system changes the order to the selling unit of each (EA). The order is changed to the number of items that are on-hand. Since in this case, there are 2 boxes and 3 eaches, the system places 53 folders on the order.

**N** The system places the number of the item that is on-hand and is in the correct buy unit. In this example, 2

boxes would be placed on the order. The remaining box is placed on backorder.

**Step 5:** The system automatically adjust the price in the PRICE field to reflect the correct price for the folders. The cursor moves to the SELL field. You can complete this order just as you normally do.

## Changing the Selling Unit on an Order

There may be times when you order an item in the wrong unit of measure. If this happens, you can change the unit of measure in the (GVC) Order Change screen.

Use the following instructions to change the unit of measure for an item on an order:

**Step 1:** Go to the (GVC) screen and enter the transaction number of the order that contains the item.

**Step 2:** In the Which Lines to Change Window, select the Item Number Entry option.

**Note:** You can also retrieve the item by choosing the Mark Lines, Line Number Entry, or Change All Lines option. For details, see *Book III: Order Entry*.

**Step 3:** At the prompt ENTER ITEM NUMBER ON ORDER, enter the number of the item you want to change.

**Figure 15: The Multiple Units Of Measure Window**

```

17:49:24                (GVC) Order Change  (01/20/98)                03/27/98
-----
Order Writer :SHAR          G/L Loc # 1  Inv Loc # 1      Transaction #  10076-0
Name :CALAHAN SUPPLIES      #          10014      #____.%.% $____.____
-----
#_ Item_____ Mfg _____ Description_____ UM C D Order _Ship _Price_
 20          NSC FLDR,HANG,RCYCLD,LTR,1/5,RD EA Y 1      3      3      2.172
-----
+---| Multiple Units Of Measure |---+
|      Select Sell Unit 1/2 (2)      |
|      - - - - - - - - - - - - - - |
|              Unit      Quantity    |
|      1) BX              1          |
|      2) EA              10         |
|      - - - - - - - - - - - - - - |
+---+
-----
P. Cost $      .299 A. Cost $      .299 Sell $      .724 List $      .724 58.7%
    
```

## Multiple Units of Measure

- Step 4:** When the system displays the Information to Change Window, select the [J] Other Options function.
- Step 5:** In the next Information to Change Window, type C to select the Multiple UOM option.
- Step 6:** In the Multiple Units Of Measure Window, shown in Figure 15, enter the correct selling unit for this order. You select the selling unit by entering the corresponding number. The system automatically adjusts the price on the order according to the selling unit you chose.
- Step 7:** When the cursor returns to the Information to Change Window, you can continue to make changes to the units of measure for items on the order, or you press ESC to return to the first Information to Change Window.

## Changing the Shipped Quantity and Selling Unit on an Order

If you need to change the shipped quantity and selling unit for a multiple unit of measure item on an order, you can do this in the (GVC) screen.

Use the following instructions to change the shipped quantity and selling unit:

- Step 1:** Go to the (GVC) screen and enter the transaction number of the order that contains the item you want to change.
- Step 2:** In the Which Lines to Change Window, select the Item Number Entry option.

---

**Note:** You can also retrieve the item by choosing the Mark Lines, Line Number Entry, or Change All Lines option.

---

- Step 3:** At the prompt ENTER ITEM NUMBER ON ORDER, enter the number of the item you want to change.
- Step 4:** When the system displays the Information to Change Window, select the [E] Ship Quantity option.
- Step 5:** A window appears with the prompt ENTER NEW SHIPPED QUANTITY. Enter the new shipped quantity for the item.
- Step 6:** When the cursor moves to the SELECT SELL UNIT prompt, enter the selling unit for the item.
- Step 7:** Depending on whether you decreased or increased the shipped quantity, the ENTER QUANTITY TO RESTOCK or the DEDUCT

CHANGE FROM ON HAND prompt appears. You answer these prompts the same way as when you change the shipped quantity for any other item. If you need instructions, refer to *Book III: Order Entry*.

**Step 8:** The system returns to Information to Change Window, so that you can continue to make changes.

## Viewing Usage Quantities for an Item With Multiple Selling Units

The following text gives you instructions for viewing the usage quantities for an item with multiple units of measure. This information is set in the Inventory Usage Record in the (E) screen. Information for this record is stored in the I-AUX file.

**Step 1:** Go to the (E) screen and select the (I) Inq action code.

**Step 2:** When the cursor moves to the LOC field, press RETURN to accept the default location or enter the location number.

**Step 3:** In the ITEM # field, retrieve the item.

**Step 4:** After you specify Y at the CORRECT RECORD prompt, the system displays the NEXT LOC, RET=NEXT ITEM, M=MULT, D=DETAIL, X=HIST, V=VEN, G=MULTI BINS prompt. To view the quantities, type **M** and press RETURN.

**Step 5:** The system displays the quantities, as shown in Figure 16. The

**Figure 16:**  
Viewing the  
Quantities for a  
Multiple Units  
of Measure Item

```

19:45:21                (E) INVENTORY MASTER REV. (03/04/98)                03/27/98
-----
ACTION [I] (A-Add, C-Chg, D-Del, I-Inq, J-Adj Qty, H-History, N-Remarks)
(Q-Qtys Cost, O-Other Screens)                                           Loc [ 1] (Space All)
----- MASTER RECORD ----- PRICING RECORD [ 1] -----
Item #00835          Co:NSC          Cost $ 7.470 List $ 18.090 58.7%
Desc. :FLDR,HANG,RCYCLD,LTR,1/5,RD   Dept : Class : Cont : Min Qty :
[ ] Alter.#          Co:          ----- PURCHASING VENDOR -----
Unit :BX Dept :1 Class :Y Sic :CQ     ----- INVENTORY USAGE RECORD -----
UPC #035255008358   Multiple Bin :   Bin P: S: Min : Max :
----- DIRECT BUY ----- Hits : 1
Vendor ID :..... Cost $..... [BX] - 10 [EA]
Page #... Prefix :... L.Cost $..... Backorder : r.:
Buy Unit :.. Of :... F.Cost $..... On Order : r.:
Eff. On :.././.. F.List $..... On Hand : 2 r.: 3
Item #..... UPC#..... Allocated : r.:
----- PRIMARY WHOLESALER [ 1] ----- Receipts : r.:
Vendor ID :SPARCO Cost $ 7.470 Mtd Sold : r.:
Page #054 Prefix :NAT L.Cost $ .000 Last P/O Qty : r.:
Buy Unit :BX Of : 1 Catalog $ 18.090 Last P/O #
Purchasing Vendor ID : 1 File :W (W/C) Due : / / Vendor:
Item #00835 UPC#035255008358 Last Sold : / /
-----
NEXT LOC,RET-NEXT ITEM,M-MULT,D-DETAIL,X-HIST,V-VEN,G-MULTI BINS,ESC ?.. LOC- 1

```

## Multiple Units of Measure

quantities for the master unit are displayed in the first column on the left. The quantities for the tracking unit are displayed in the R field in the second column. In Figure 16, notice the following fields above the columns:

[BX] = 10 [EA]

These fields shows the relationship between the master unit and the tracking unit of measure. In this example, there are 10 eaches in a box.

Suppose you set up an item with multiple units of measure in the following way:

- The master unit of measure is BX (box)
- The tracking unit of measure is EA (each)
- The quantity of the master unit is 10 eaches
- The on-hand quantity is 12 (1 box and 2 eaches).

In the above example, the system would display the on-hand quantity of 1 (box) in the ON HAND field, and the on-hand remainder of 2 (eaches) in the R field, as shown in Figure 16. The system displays the following quantities and remainders for the item: backorder quantity, on-order quantity, on-hand quantity, allocated quantity, receipts quantity, month-to-date sold quantity, and last purchase order quantity. For more details on these fields, see *Book II: Inventory*.

**Figure 17: The Select Buy Window in the (F) Screen**

```

17:51:33          (F) Purchase Order Entry rev. (02/25/98)          03/27/98
----- Inv Loc [ 1] ----- File [PO-MASTER ] Vol [W1 ]
ACTION [0] (C-Chg,I-Inq,D-Del,O-Ord,M-Deb,R-Rec,S-S.Buys,T-Trans,P-Print,F-Fax)
Vendor #ASI      Contact :          Phone # - -
Name :          Fax # - -          R.Phone #.....
Street :          Account #          Last P/O # 10003
City :          State : Zip # -          Current P/O # 1177
----- Total Weight #_____ $_____ Due Date :__/__/__
STOCK NUMBER___ CO.____ DESCRIPTION_____ UNIT C ORDER RECEIV ACK. NBR.
20              ACC      SHREDDER,PER,HDL20,GY  BX Y O/O-  4 O/H- 11

-----
Select Buy Unit (1)
-----
Unit      Qty
1) :BX    :    1
2) :EA    :   10
:         :
:         :
:         :
-----
Vendor :UNITED Prefix :WLJ Buy Unit :EA of :* 10 Bin (P) : (S) :
Lst Sold : / / Mtd Sold : Hits : 1 Ytd Sold : Sales $
CORRECT RECORD Y/N/A/O/U/V ?Y
  
```

## Purchasing Items with Multiple Selling Units

When you retrieve a multiple unit of measure item in the (F) screen, the system displays the Select Buy Unit Window.

Use the following instructions to place the item on the purchase order:

- Step 1:** When you retrieve a multiple unit of measure item, the system displays the Select Buy Unit Window, as shown in Figure 17. This window displays the two multiple units for the item. To the left of the multiple units, the system displays the corresponding numbers—1 and 2. This window defaults to the master unit for the item. You can press RETURN to accept the default, or enter the number that corresponds to the purchasing unit.
- Step 2:** After you enter the purchasing unit, the cursor moves to the COST field. You can continue to enter this item on the purchase order just as you normally do.

## Placing Items With Multiple Selling Units on a Purchase Order Using the Short-Buy

Use the following instructions to place a multiple unit of measure item on a purchase order using the [S] S Buy action code in the (F) screen.

- Step 1:** When you retrieve a multiple unit of measure item, the system displays the Select Buy Unit Window. This window displays the two multiple units for the item. To the left of the multiple units, the system displays a corresponding number—1 and 2. This window defaults to the selling unit of measure that was specified in order entry. You can press RETURN to accept the default, or enter the number that corresponds to the purchasing unit.
- Step 2:** After you enter the purchasing unit, the cursor moves to the ORDER field. Continue placing the short-buy purchase order just as you normally do.

