2004-211 - Set-up Material Groups and Unit of Measure

Overview:

Materials are place into groups and given units of measure for tracking purposes. By using these features the program can calculate that a certain materials may be purchased via a bulk method and dispensed via a calculated measure. This enable the user to track the material and know how much was delivered, what has been used, what has been allocated to other jobs, and what is on hand.

Create your Unit of Measure if it is not in your system – click on System Codes.



Click on 'Unit of Measure' from the drop-down Data Set menu. Enter code and description, **press** <F9> to save.

💷 Units of	Measure	
Code:	Unit Description:	
LGT	✓ Length	

Continue to create Units of Measure as required.

Code		Description	<u>O</u> K
BOX	Box		
CAN	Can		Cancel
DISC	Disc		
DRUM	Drum of Liquid		
EACH	Each		
KGS	Kilogram		
LGT	Length		
LITRE	Litre		
MM	Millimetres		
MTR	Metre		
OFFCUT	Offcut		
PACK	Pack		
PAIR	Pair		
ROLL	Roll		
SET	Set		
SHT	Sheets of Metal		
SQM	Square Metre		
TIN	Tin		
TUBE	Tube		
UNITS	Units		

Create the Material Group - Click on *Inventory* from the Ribbon to display the drop-down menu and then **click** on 'Material Groups'.



For this example the group for Steel Bar/Rod is being created – Type in the code and the description also a short description if necessary. In the "Uom1" field **click** on the drop-down list and select the option for 'Calculation' and then in the "Uom2" field select the option for Length. For material in this group the program calculates that the steel bar is purchased as a length and distributed by the unit of measure in the UoM1 field. Enter the relevant account codes in the "Purch Acc, Sales Acc, & Asset Acc" if required and **press** <F9> to save.



Using Material Groups and Units of Measure – Example of New Material - Open the *Inventory Tab* on the Ribbon, **click** on the 'Material Details' icon and enter a code and a description. Ensure that the "Active' box is ticked and **click** on the 'Inventory Item' box to tick **press** <TAB> until the user is in the "Emp No" field. Enter the employee number or **press** <F> and select employee from the pop-up list and **click** on OK. **Press** <TAB> to advance to the "Material Group" field and **click** on the drop-down to view the list of groups previously created and select the required group.

	Material - <entry locke<="" th=""><th>d, View Only></th><th>- • ×</th></entry>	d, View Only>	- • ×		
Material Code: MS_RB_2000X10MM	Material Description: MS Round Bar 2000MM x 10MM		Rev: Date Entered: 25/10/2016		
Details Allocation History More Info Purchase Quotes Used In Invoices Financial Hist Notes					
Active Inventory Item Actual Purchase in Multiple Dummy Pre Order Emp: 1 - Robert JONES					
Fill to Maximum ♥ Auto Order □ Job Group Otv in Multiple □ Web Site ♥ Pur UoM 2 Material Group: Bom T: □ Multiple ength Width Weight: Surface: Volume: UoM 1: UoM 2: Thick Lead/T:					
11 - Material by Length M	2000.0000 0	MM 000. 000. 000. 0	/		
Supplier Code Sup Mat Code Supplier Description Date Price UoM 1 Price UoM 2 Price Pref. QPrf					
Sub Material Group	Inventory	Purchasing	UOM Conversion Factor		
•	On Hand:	Min Order: .0000	UoM2 > UoM1: 2000.000000		
Spacing: Border:	Bin Location:	Max Level: .0000	Margin		
Last Purchase Price	Used In:	Safety Level: .0000	Sell Price .1000		
\$72.8400 0%	· · · · · · · · · · · · · · · · · · ·	Reorder Level: .0000	Account Details		
	Allocated: .0000	Stock Type:	Purch Acc:		
\$72.8400 Avg Price:	Plan: .0000 .0000	On Order: .0000	Sales Acc: 🗸		
\$72.8400 Std Price:	0 Available: .0000	To Order: .0000	Asset Acc:		

Press <TAB> to advance to the "BoM Type" select the type from the drop-down list for material, and continue to <TAB> through the fields and enter the information as required. At the "Uom1" field (**U**nit **of M**easure) **press** <F2> or select from the drop-down list and **click** on OK. Repeat for "Uom2" if required.

UoM 1 & 2 used for Purchasing

Uom1 = the volume in which the material used. **Uom2** = the capacity in which the material is purchased. (). ENSURE the "Pur Uom2" box is ticked – see above.

Press <TAB> to advance to the "Supplier Code" field, enter the supplier code for new material. Advance to the UOM Conversion Factor field and enter the measurement, this is the UoM2 measurement. Enter the "Uom2" price for the Length and **press** <TAB>, this will calculate the price per mm for this example. Fill other fields as necessary. **Press** <F9> to save.