



Coffee Break & Learn: Tip of the Week – September 28, 2017

Weight & Units for Specific Item? Yes, You Can!

Available Starting SAP Business One 9.1

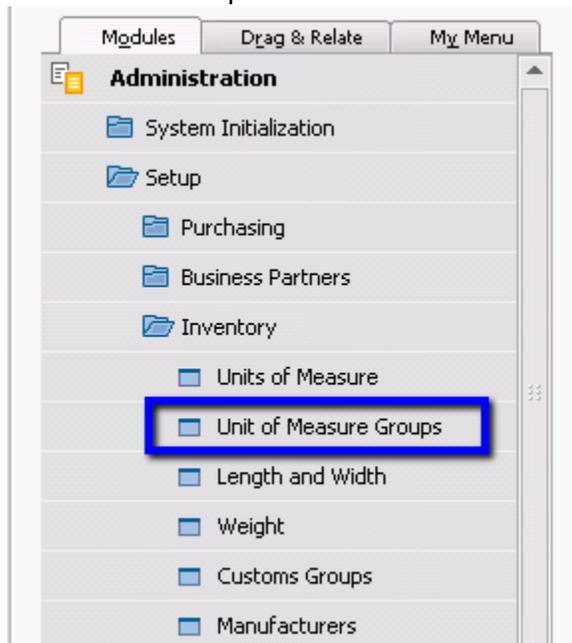
Background

Many organizations may purchase and sell items by weight while managing inventory using different units of measure. Starting from SAP Business One version 9.1, you may define a weight factor which translates units into weight and vice versa. We will discuss two ways of setting up weights and units for specific items: through the item group definition and through factors.

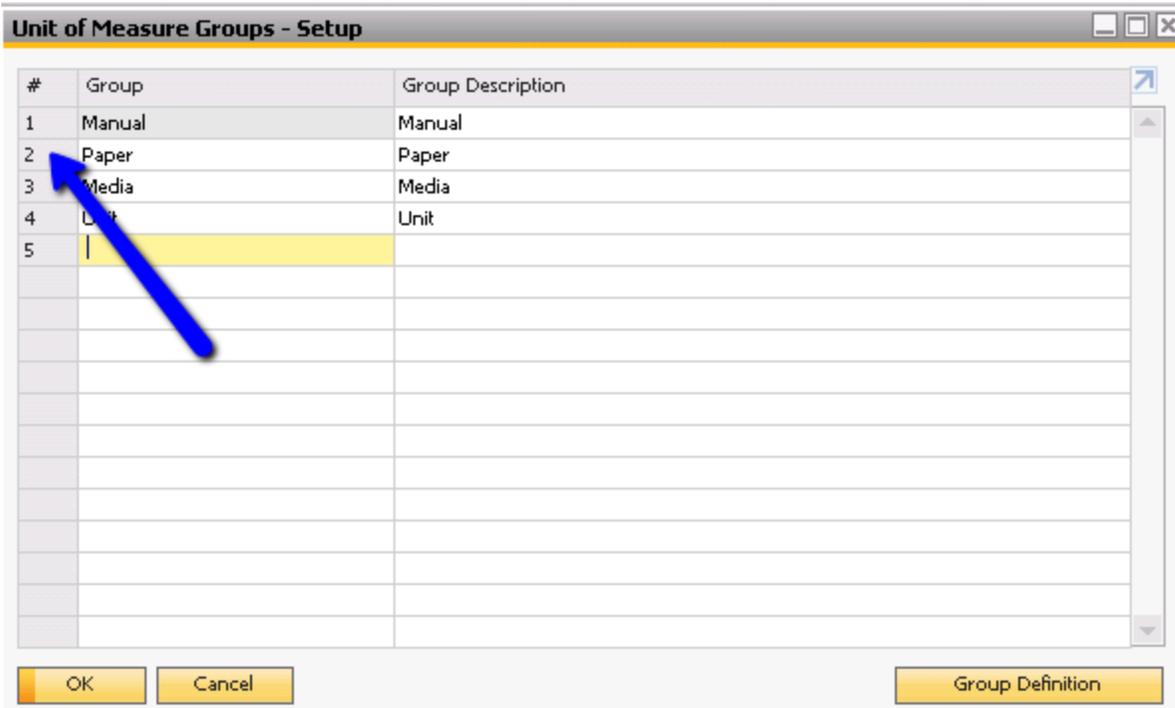
Unit of Measure Group Definition

UoM Group Setup

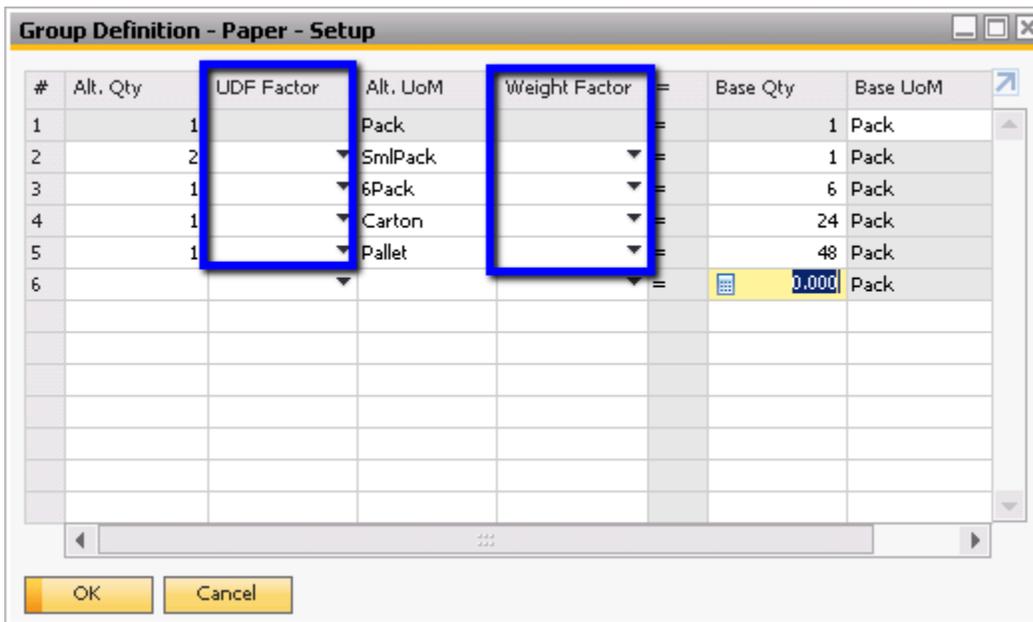
The Item Group definition set up window can be found in Administration > Setup > Inventory > Unit of Measure Groups.



The Unit of Measure groups – Setup screen will be displayed. Double click on the row number to open the setup for a specific group.



Starting in SAP Business One version 9.1, there are two additional fields in the group definition setup window: UDF Factor and Weight Factor.



The selectable values in the Weight Factor field can be found in the Weight – Setup screen under Administration > Setup > Inventory > Weight.

Weight Factor	=	Base Qty	Base UoM
	=	1	Pack
	=	1	Pack
	=	24	Pack
mg	=		
g	=	48	Pack
kg	=		Pack
Oz	=		
Lb	=		

#	Code	Unit Name	Weight (mg)
1	g	Gram	1,000
2	kg	Kilogram	1,000,000
3	Lb	Pound	453,592.4
4	mg	Milligram	1
5	Oz	Ounce	28,300
6			

In this window, the weight factor times alternative quantity equals base quantity. Subsequently, the alternative quantity equals the base quantity per divided by weight factor.

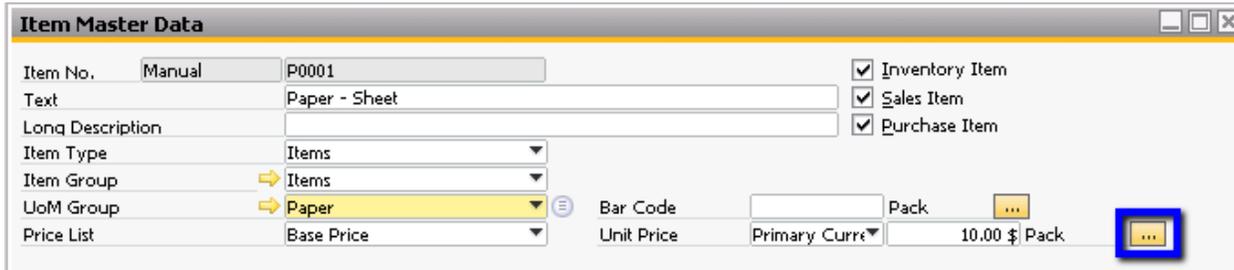
#	Alt. Qty	UDF Factor	Alt. UoM	Weight Factor	=	Base Qty	Base UoM
1	1		Pack		=	1	Pack
2	2		SmPack		=	1	Pack
3	1		6Pack		=	6	Pack
4	1		Carton		=	24	Pack
5	1		Pallet		=	48	Pack
6	8		Lbs	Lb	=	1	Pack
7	0.0001				=		Pack

Update Cancel

In the above example, one pack of the paper item group contains 8 pounds. The Lbs indicates its own unit of measure which is measured in, unsurprisingly, pounds.

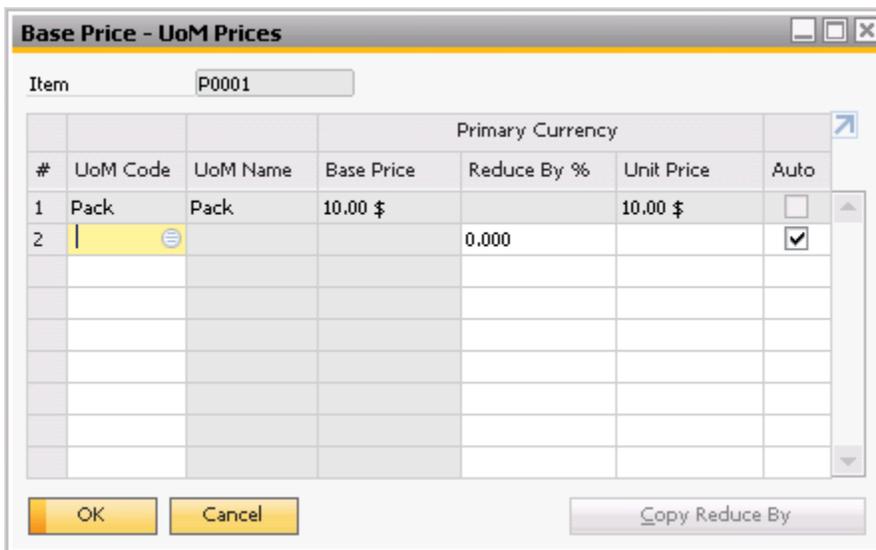
After adjusting the weight per UoM group, click Update in the specific item group definition. Then click Update again to save the unit of measure groups setup.

Then click the  icon next to the Unit Price.



The 'Item Master Data' window shows the configuration for item P0001. The 'Unit Price' field is set to '10.00 \$ Pack' and is highlighted with a blue box. A blue square icon with three dots is located to the right of the unit price field.

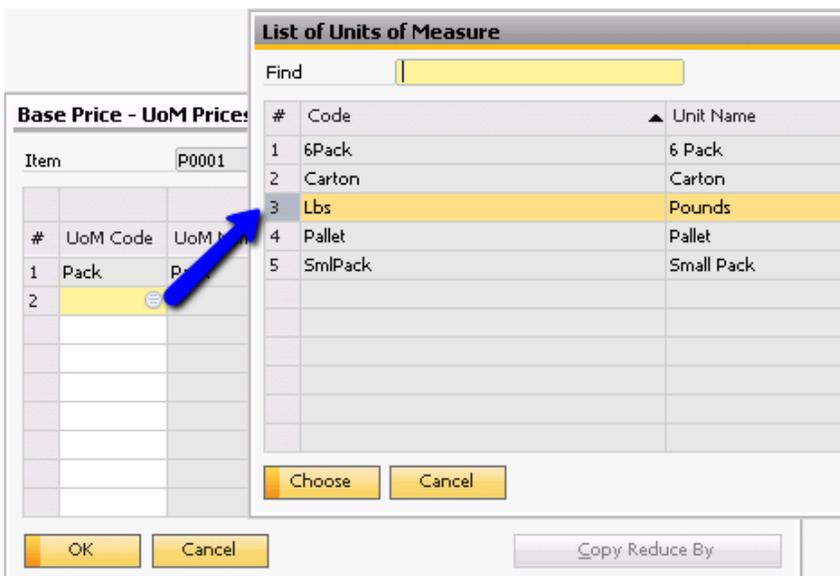
This will display the Base Price for each UoM.



The 'Base Price - UoM Prices' window displays a table for item P0001. The table has columns for '#', 'UoM Code', 'UoM Name', 'Base Price', 'Reduce By %', 'Unit Price', and 'Auto'. Row 1 shows 'Pack' with a base price of '10.00 \$' and 'Unit Price' of '10.00 \$'. Row 2 is highlighted in yellow and shows a 'Reduce By %' of '0.000' and an 'Auto' checkbox checked.

#	UoM Code	UoM Name	Base Price	Reduce By %	Unit Price	Auto
1	Pack	Pack	10.00 \$		10.00 \$	<input type="checkbox"/>
2				0.000		<input checked="" type="checkbox"/>

Select Lbs. in order to define a base price per pound.



The 'List of Units of Measure' dialog is open over the 'Base Price - UoM Prices' window. The dialog has a 'Find' field and a table with columns for '#', 'Code', and 'Unit Name'. Row 3, 'Lbs' (Pounds), is highlighted in yellow. A blue arrow points from the 'Lbs' row in the dialog to the empty 'UoM Code' field in the 'Base Price - UoM Prices' window.

#	Code	Unit Name
1	6Pack	6 Pack
2	Carton	Carton
3	Lbs	Pounds
4	Pallet	Pallet
5	SmlPack	Small Pack

When Lbs is chosen, will populate with the base price per base Uom divided by the number of alternate UoMs for each base UoM (in this case 8). For this reason, the system will suggest \$1.25 per pound for this item. However, you may change this value if needed.

Primary Currency						
#	UoM Code	UoM Name	Base Price	Reduce By %	Unit Price	Auto
1	Pack	Pack	10.00 \$	0.000	10.00 \$	<input type="checkbox"/>
2	Lbs	Pounds	1.250000 \$	0.000	1.25 \$	<input checked="" type="checkbox"/>
3				0.000		<input checked="" type="checkbox"/>

Click Update when finished.

Item Master Data - Factors

If you would like to apply weights for only a specific item without making any changes to the item group definition, you may also use factors in the item master data. Although factors relate not only to weight, they can be used as a proxy for weight definitions. Note that the use of factors is restricted to the Manual UoM Group

Inventory Data Tab

We will use the example of item P0001 (Paper – Sheet). In the inventory tab, we see that the UoM Name is lbs., indicating that the prices seen in the price lists are tied to pounds. Note that the Weight field indicates the weight per inventory unit of measure (and thus is more relevant when the inventory UoM is not a weight unit).

Item Master Data

Item No. Manual P0001 Inventory Item
Text Paper - Sheet Sales Item
Long Description Purchase Item
Item Type Items
Item Group Items
UoM Group Manual Bar Code
Price List Base Price Unit Price Primary Currency 10.00 \$

General Purchasing Data Sales Data **Inventory Data** Planning Data Production Data Properties Remarks Attachments

Set Inv. Method By Warehouse Manage Inventory by Warehouse
Inventory Level
Required (Purchasing UoM)
Minimum
Maximum

UoM Name lbs
Weight 1Lb

Valuation Method Serial/Batch

#	Whse Code	Whse Name	Locked	In Stock	Committed	Ordered	Available	Mi...
1	01	General Warehouse	<input type="checkbox"/>	1,000	50		950	
2	02	West Cost Warehouse	<input type="checkbox"/>					
3	03	Dropship Warehouse	<input type="checkbox"/>					
4	04	Consignment Warehouse	<input type="checkbox"/>					
5	05	Reserve Warehouse	<input type="checkbox"/>					
				1,000	50		950	

Set Default Whse

OK Cancel

Sales Data Tab

In the Sales Data tab, you may specify the unit of measure which will be used to sell the item. For example, a customer may want to purchase an item in cases, though the item will be priced in pounds. You may also use factors to further specify the conversions. Factor 1 indicates the default sales UoM quantity that will populate in sales documents (which can be changed). Factor 2 indicates the number of inventory UoMs in a single sales UoM. In the example below, a case contains 8 pounds of item P0001.

Item Master Data

Item No. Manual P0001 Inventory Item
Text Paper - Sheet Sales Item
Long Description Purchase Item
Item Type Items
Item Group Items
UoM Group Manual Bar Code
Price List Base Price Unit Price Primary Curre 10.00 \$

General Purchasing Data Sales Data Inventory Data Planning Data Production Data Properties Remarks Attachments

Sales UoM Name cs
Items per Sales Unit 1
Packaging UoM Name
Quantity per Package 1

Length
Width
Height
Volume ci
Weight 1Lb

Factor 1 2
Factor 2 8
Factor 3 1
Factor 4 1

OK Cancel

When entering the item in a sales document, the following will automatically generate:

Sales Order

Customer C30000 No. Primary 410
Name Microchips Status Open
Contact Person Judy Brown Posting Date 09/25/2017
Customer Ref. No. Delivery Date
BP Currency \$ Document Date 09/25/2017

Branch Supreme Beans Branch Reg. No. 121212

Contents Logistics Accounting Attachments Dimensions

#	Item No.	Item Description	Factor 1	Factor 2	Quantity	Unit Price	Total \$	Price Source	UoM Code	UoM Name
1	P0001	Paper - Sheet	2	8	16	10.00 \$	160.00 \$	Active Price List	Manual	cs
2			1	1				Manual		

Note that the quantity is a product of Factor 1 (number of cases ordered) and Factor 2 (the number of pounds in a case). The line total is therefore a product of the Quantity (total pounds ordered) times the unit price (in pounds).

Summary

The ability to easily change between weights and units affords users additional flexibility when managing inventory and sales and purchasing. You may now manage the conversion of units into weight (and vice versa) in the item group definition window or in the item master data level. Note that to define the items using weights in the unit of measure group level, the item's UoM group must be defined (not manual). To use factors, on the other hand, the UoM group for that item must be set to manual.

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