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

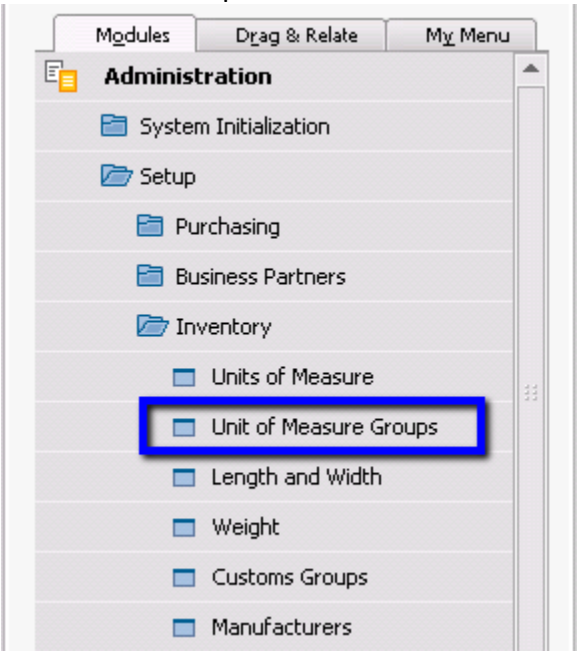
Background

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.

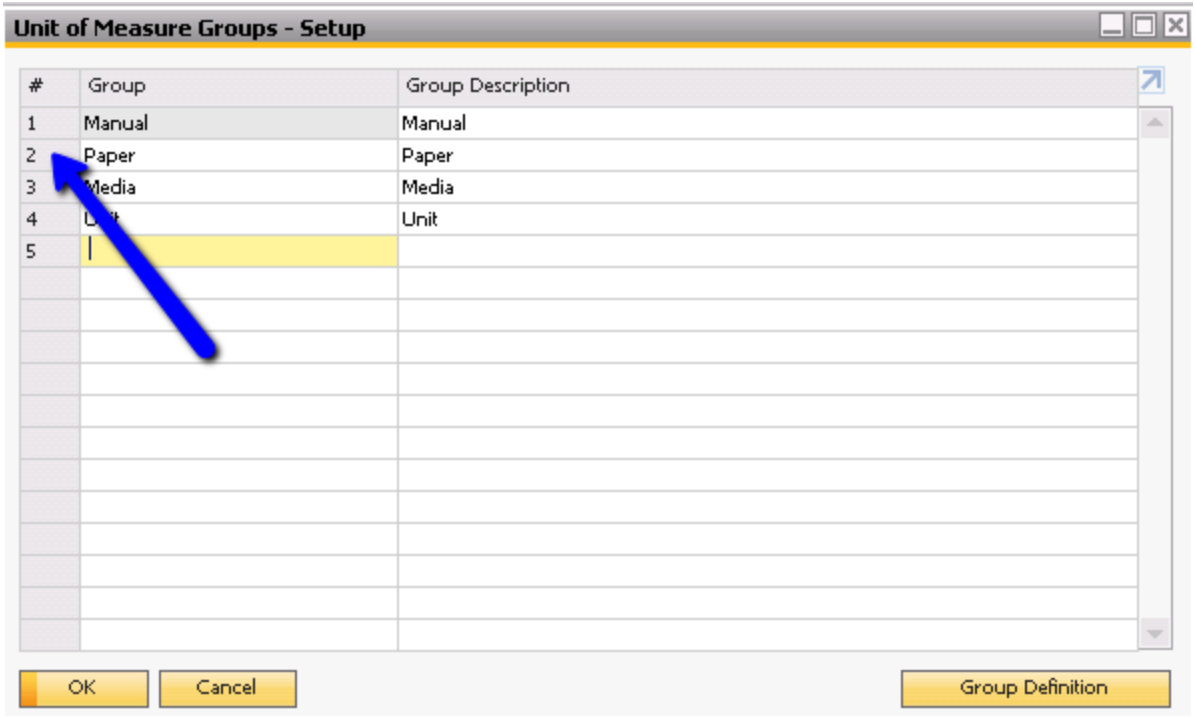
Unit of Measure Group Definition

UoM Group Setup

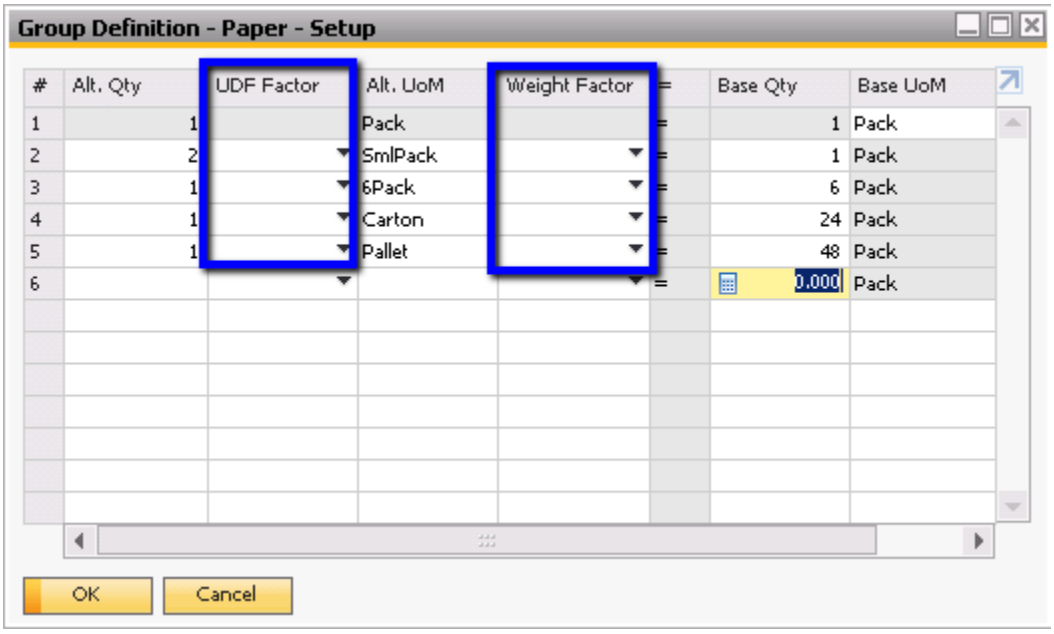
The Item Group definition set up window can be found in Administration > Setup > Inventory > Unit of Measure Groups.



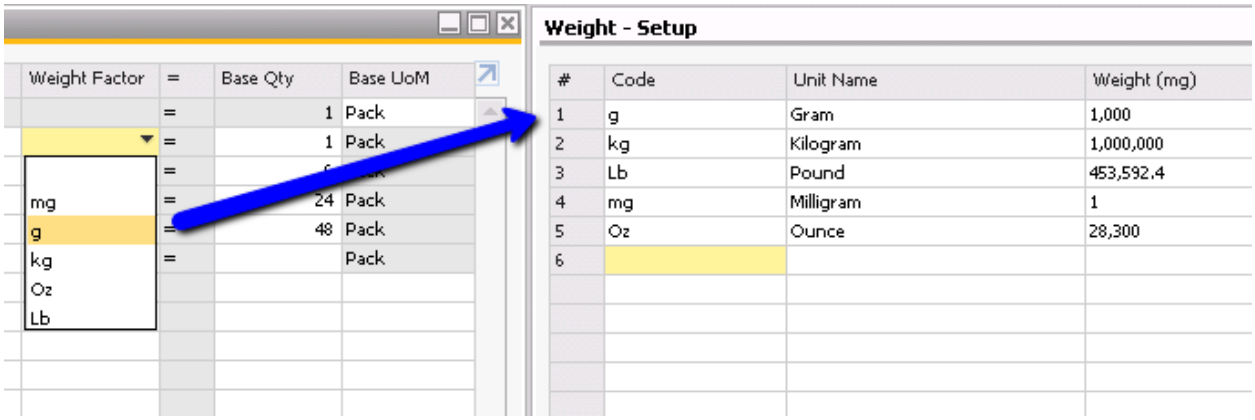
The Unit of Measure groups – Setup screen will be displayed. Double click on the row number to open the setup for a specific group.



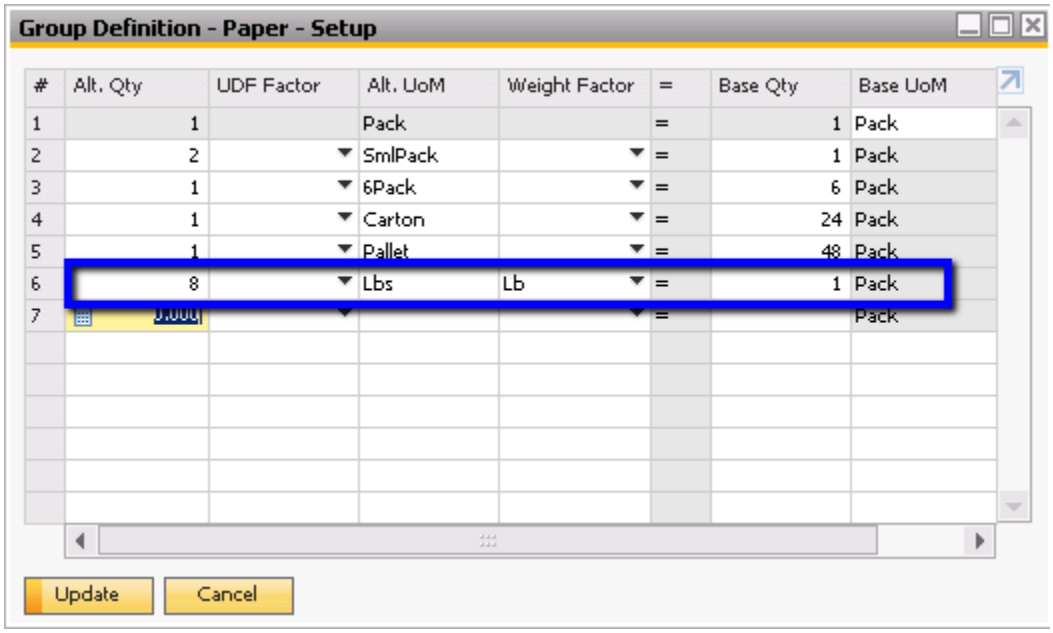
Starting in SAP Business One version 9.1, there are two additional fields in the group definition setup window: UDF Factor and Weight Factor.



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

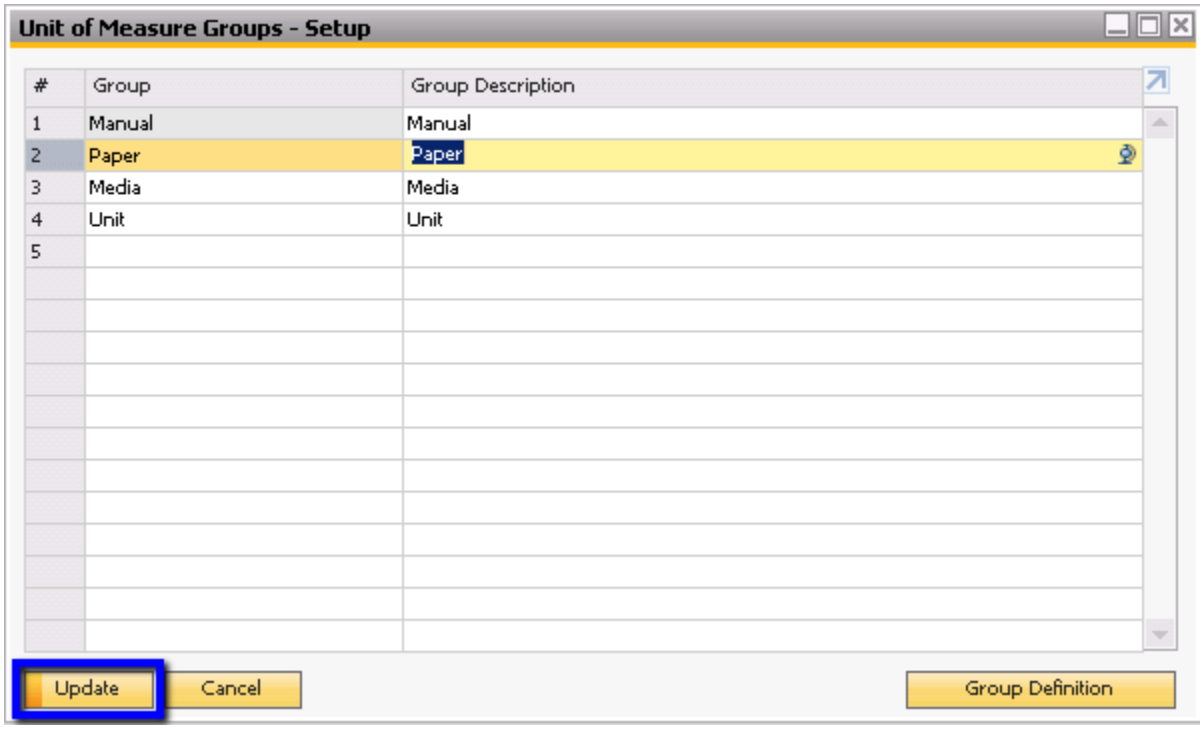


In this window, the weight factor times alternative quantity equals base quantity. Subsequently, the alternative quantity equals the base quantity per divided by weight factor.

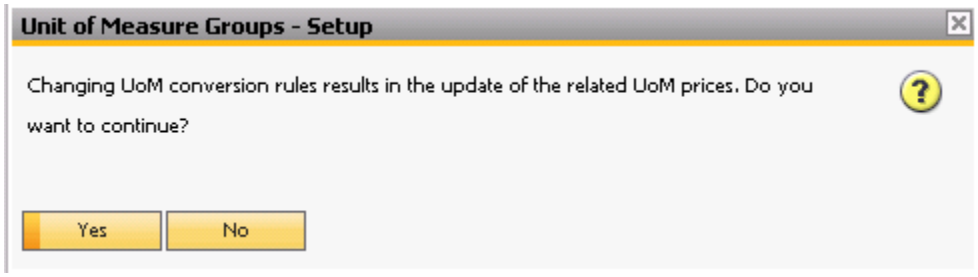


In the above example, one pack of the paper item group contains 8 pounds. The Lbs indicates its own unit of measure which is measured in, unsurprisingly, pounds.

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.



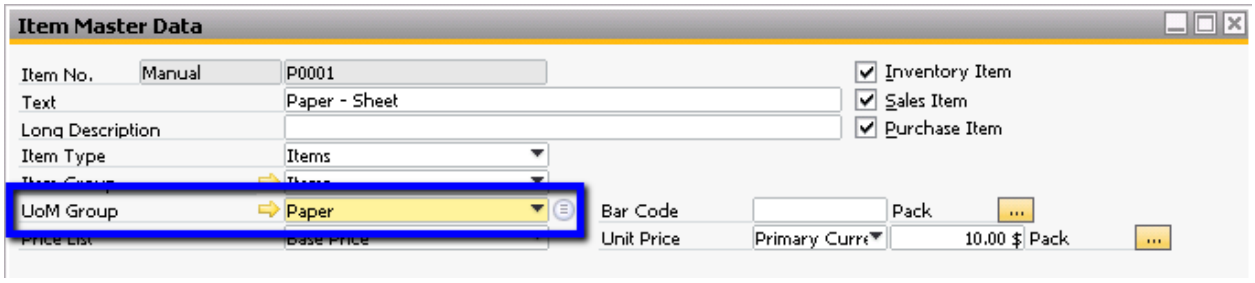
You may receive the following prompt:



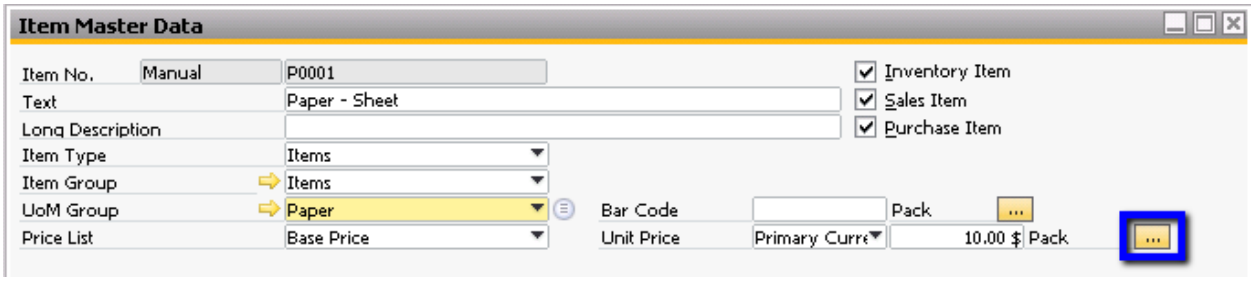
Click Yes to continue.

Unit Price by Weight in Item Master Data

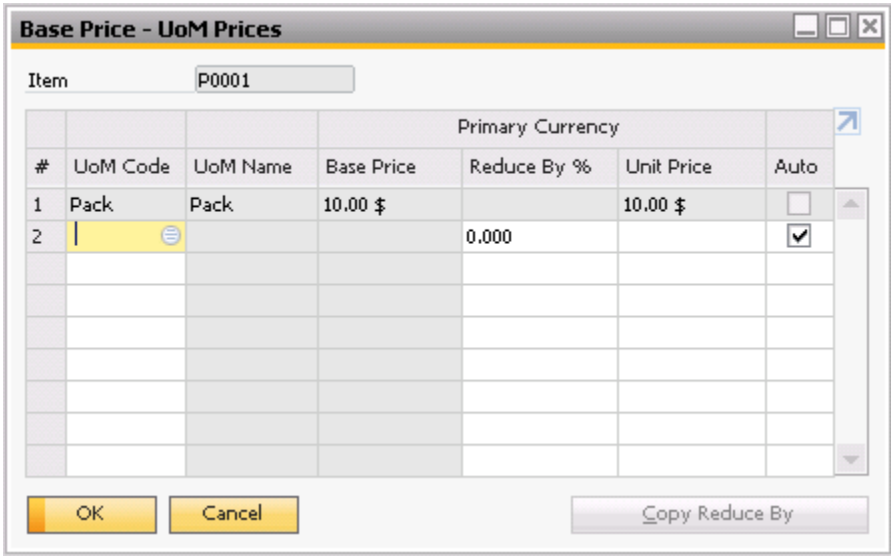
Once the UoM group definition has been updated, navigate to an item with that particular UoM group.



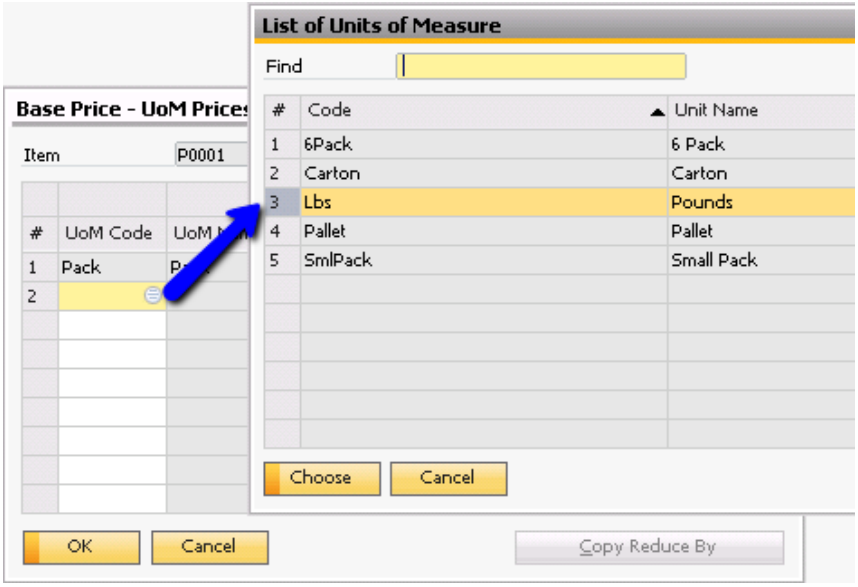
Then click the ... icon next to the Unit Price.



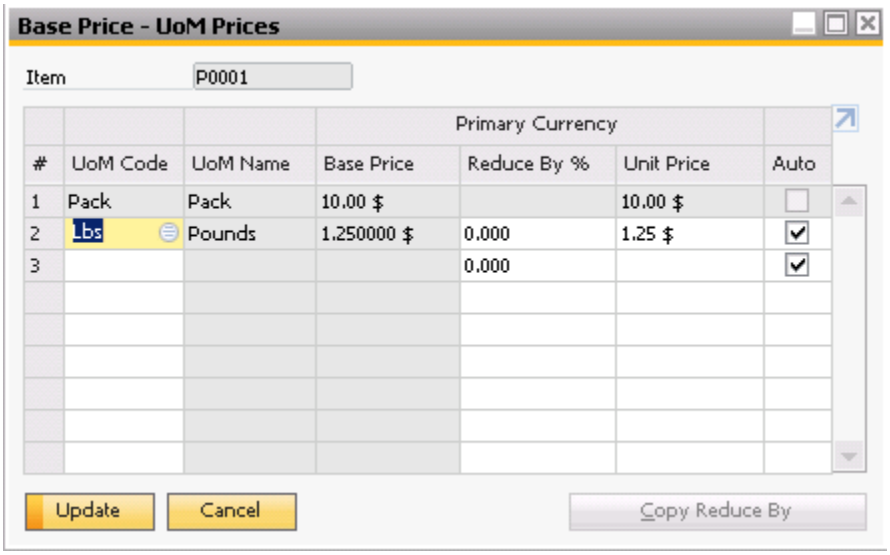
This will display the Base Price for each UoM.



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



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.



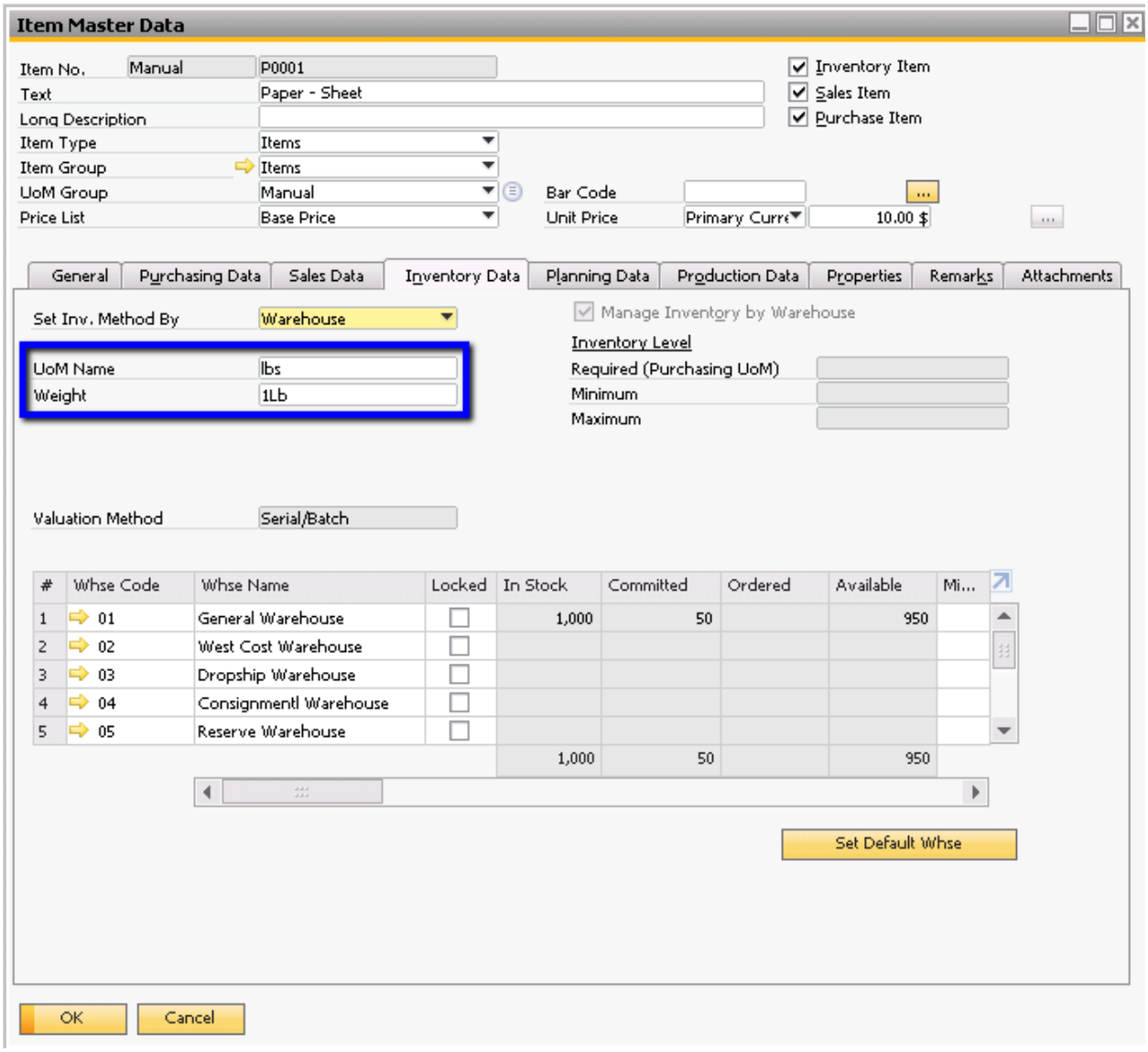
Click Update when finished.

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

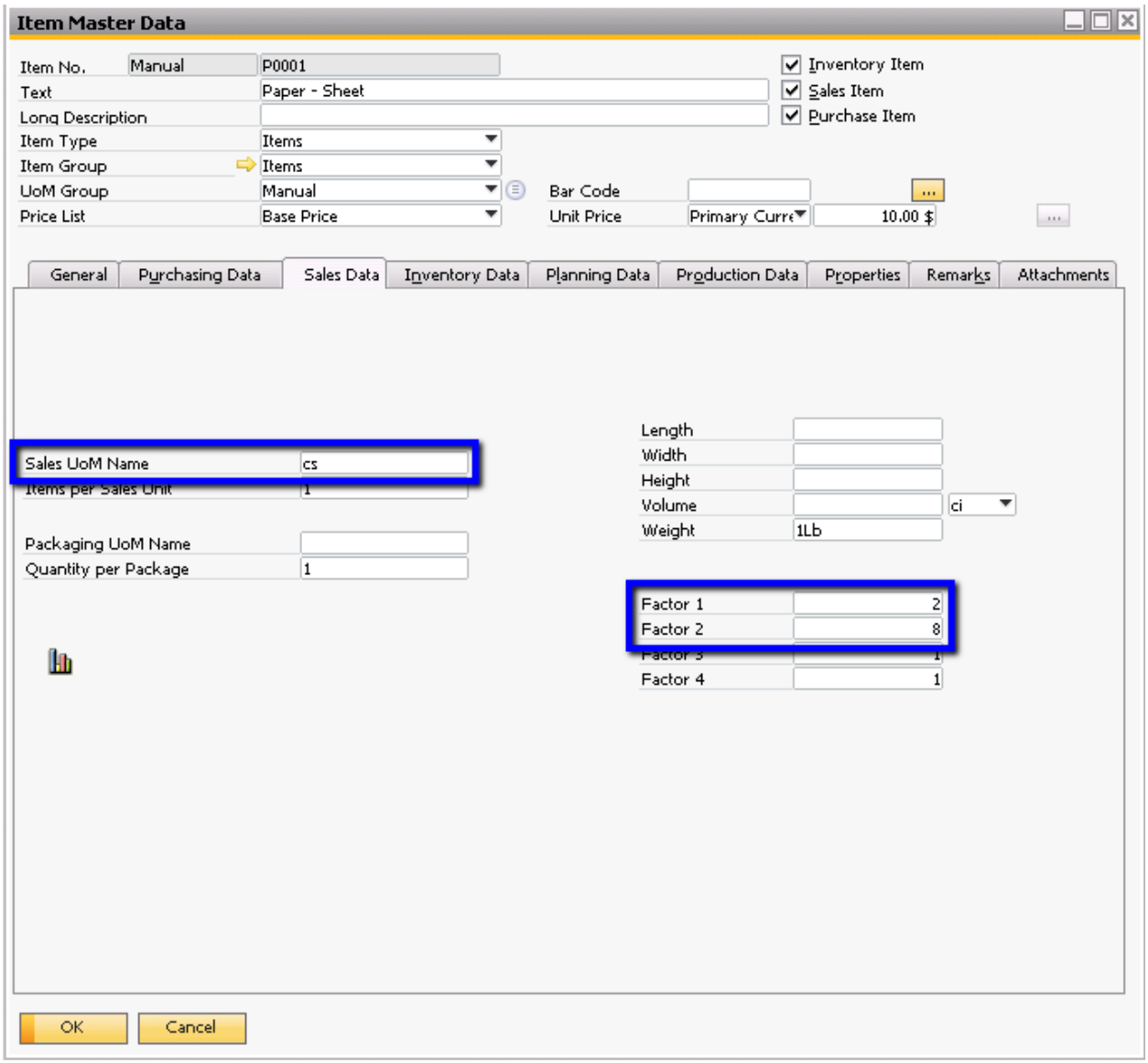
Inventory Data Tab

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).

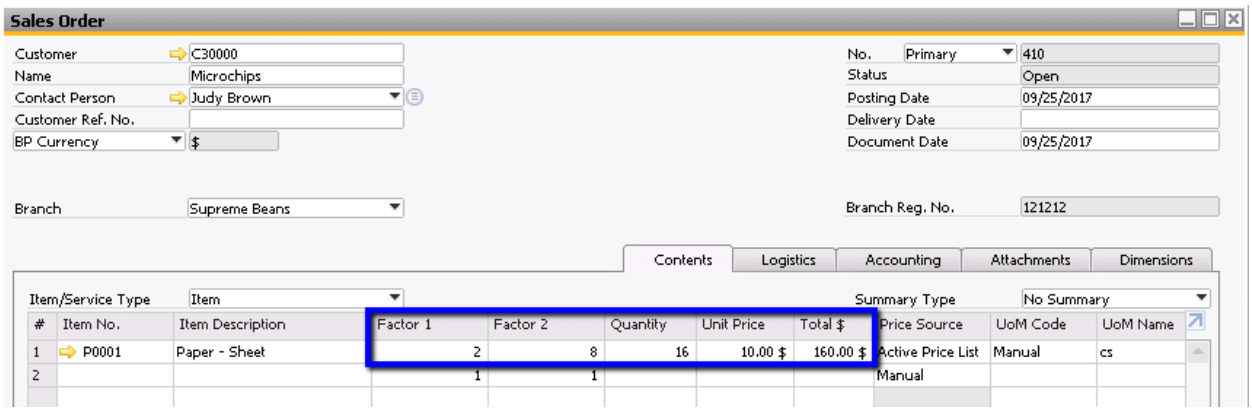


Sales Data Tab

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.



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



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.

softengine.com

T: 818.704.7000

F: 818.884.3900

Warner Center Towers
21800 Oxnard Street
Suite 1060
Woodland Hills, CA 91367