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HOW TO SETUP AND USE UNITS OF MEASURE IN ABM

FUNCTIONALITY

ABM allows you to sell the same product in up to 4 pack sizes.

The term pack size and the term Unit of measure mean the same thing for the purposes of this example.

An example would be where you sell a product called LOLLIES and it comes in a 250 gram packet, then a box of 12 x 250 gram packets, then a carton of 4 boxes and an inner of 12 cartons

STOCK CONTROL UNIT

To setup the ability to sell in up to 4 pack sizes, the first decision is to determine the stock control unit. This is the pack size that you want to use to count stock in your warehouse. Once you have determined the pack size that will be used as the stock control unit, all sales and purchases of other pack sizes will be converted to this Unit of Measure.

TESTING THE SETUP OF THE PRODUCT

Once you know the unit of measure, you need to setup a product in your Play area of Evaluation Company and setup the stock control unit as the first pack size. The stock control unit must always be the first unit of measure in ABM.

Now add the additional pack sizes and make sure you have the Ratio field on each setup correctly. ABM ratios can contain up to 4 decimal places.

If you decide that your stock control unit for LOLLIES will be the 250 gram packet, the product will be setup as follows:

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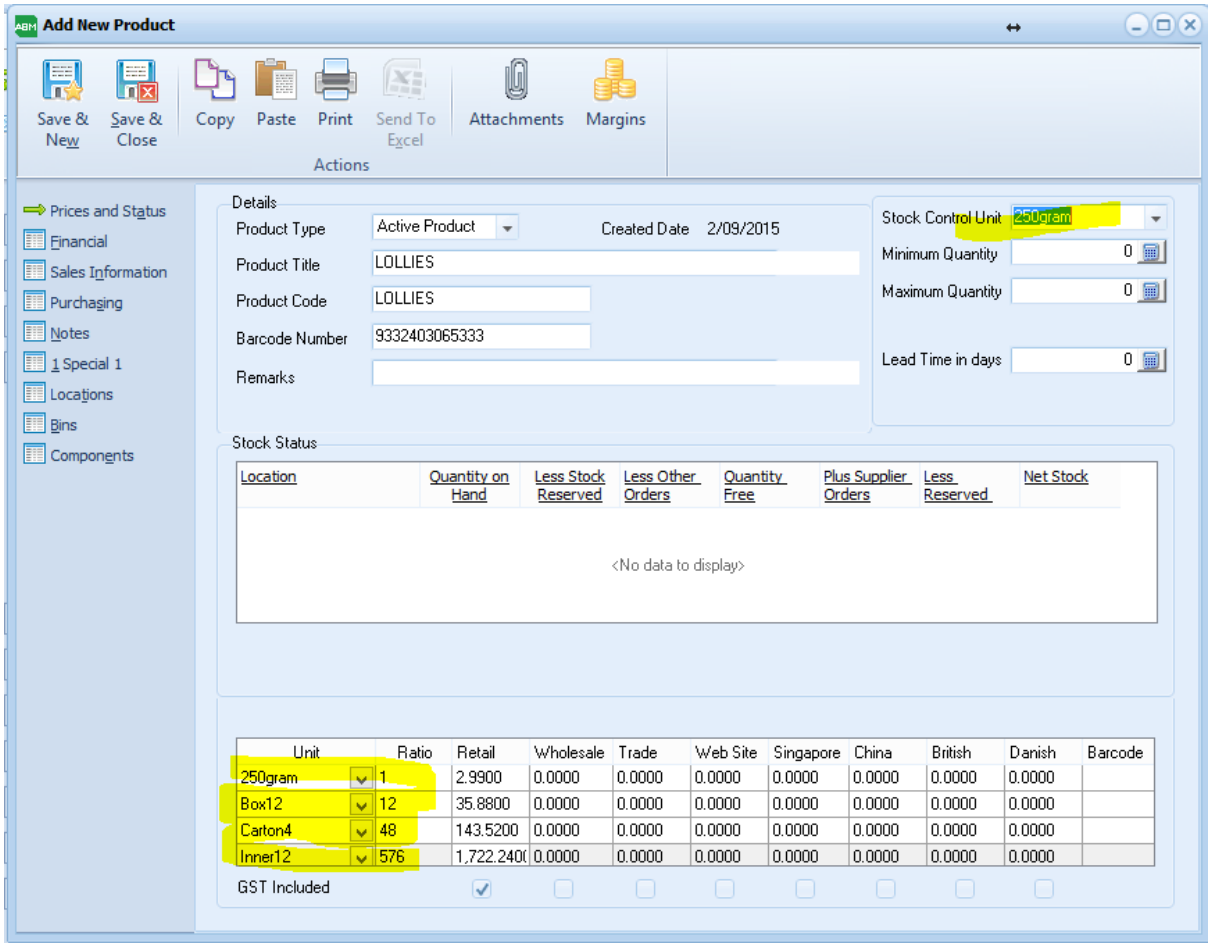

Note that the Ratio relates each pack size to the Stock Control Unit of 1 x 250gram packet.

Now you need to purchase and sell different pack sizes and check the quantity on hand after each transaction to determine if your setup is correct.

In this example, you are buying 1 x inner which should increase your quantity on hand to 576 x 250 grm packets

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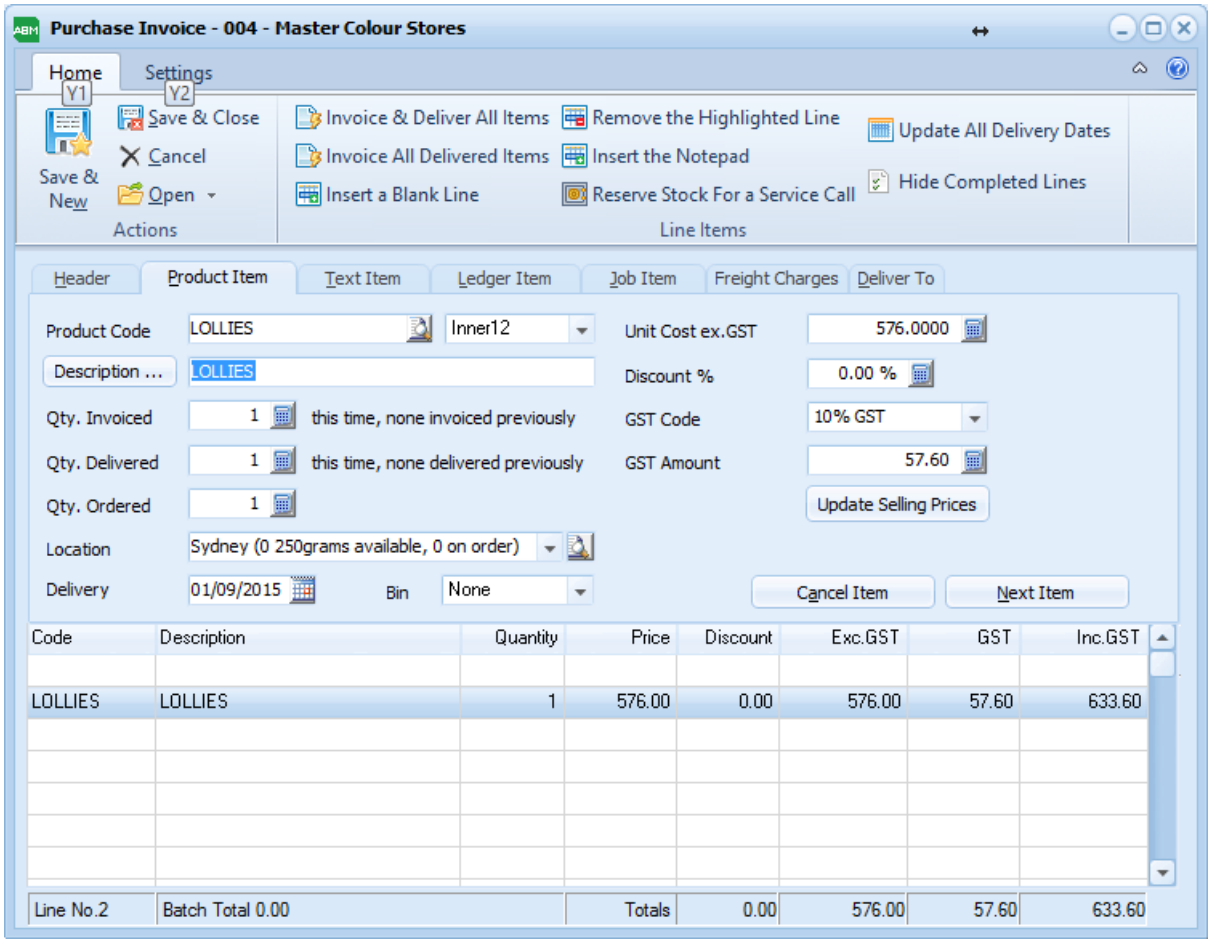

After saving, my quantity on hand is 576 packets

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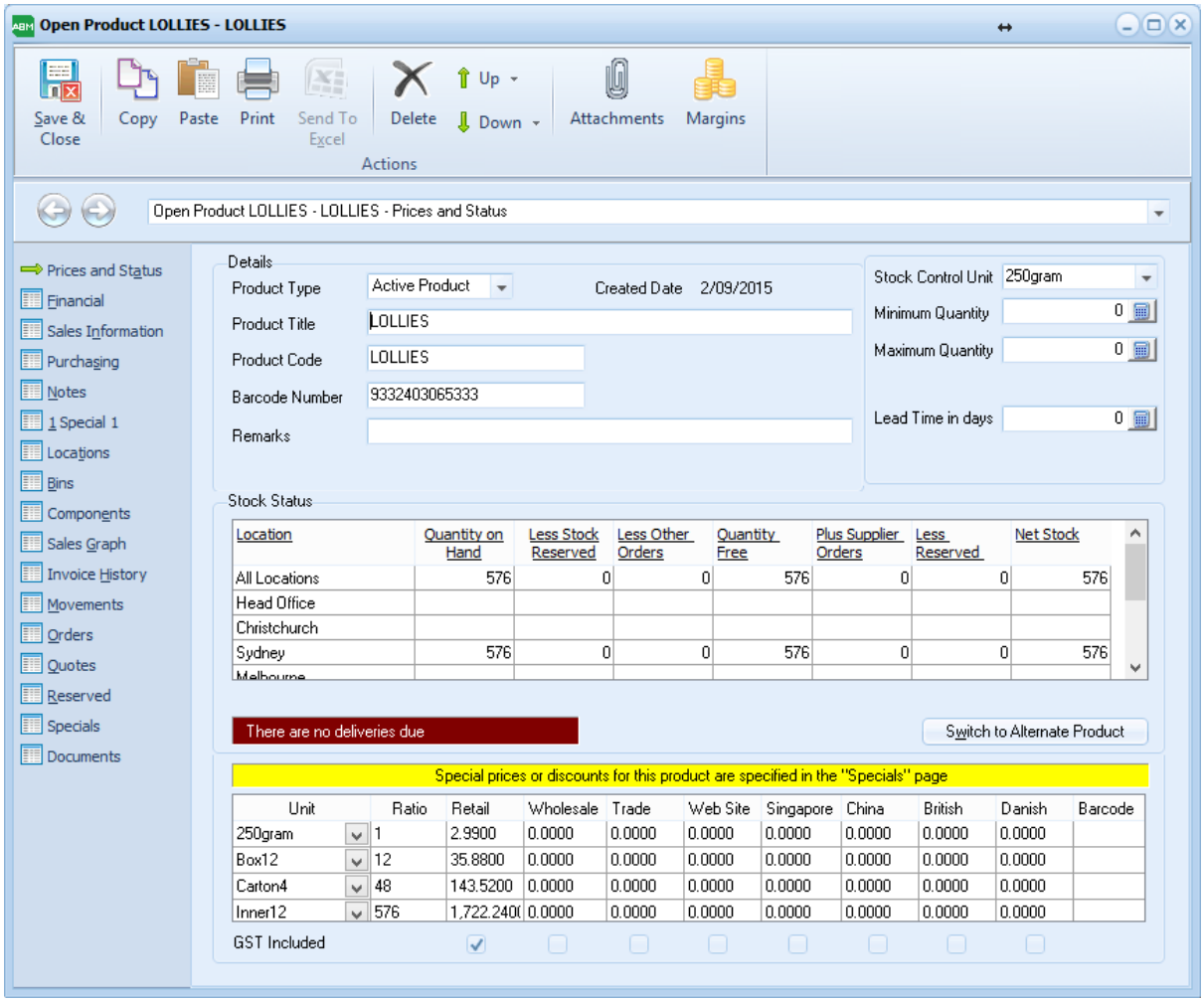

The next step is to test selling a different pack size. In this example the sale is for 1 carton that contains 4 boxes of 12 x 250gram packets

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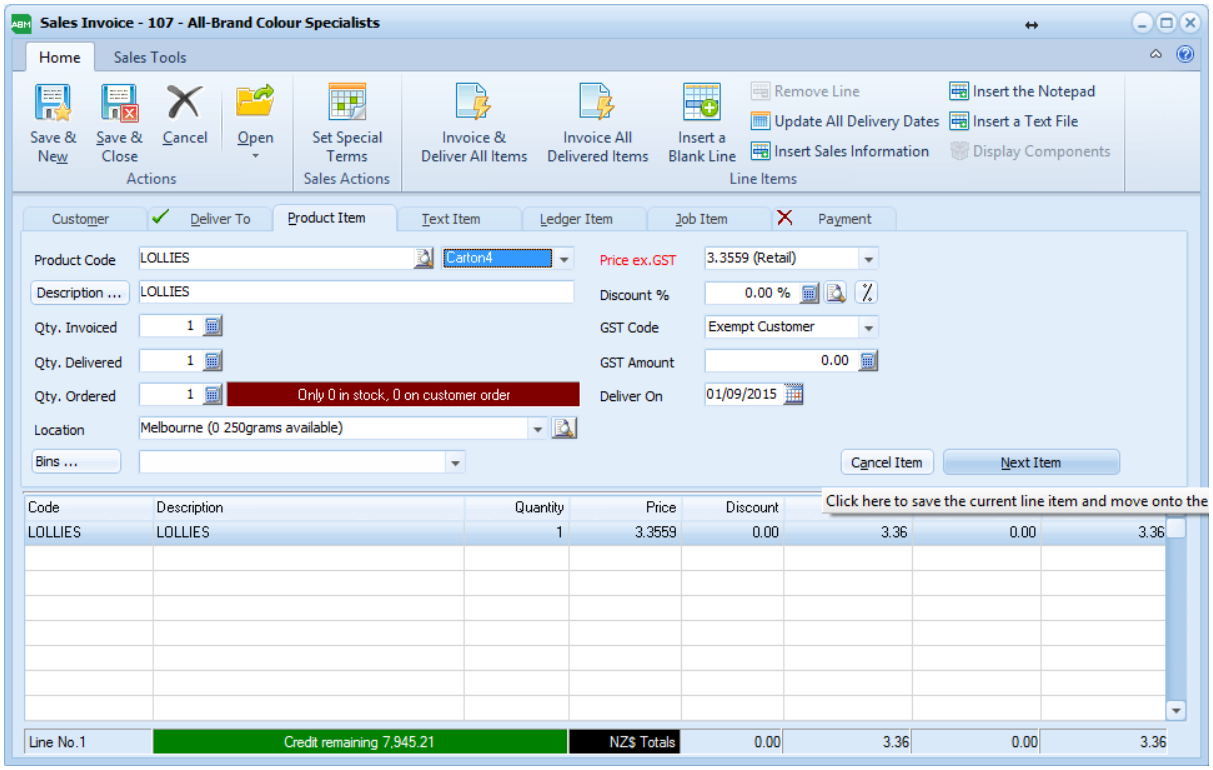

Once the sale is completed, our stock on hand should be 528 x 250 gram packets

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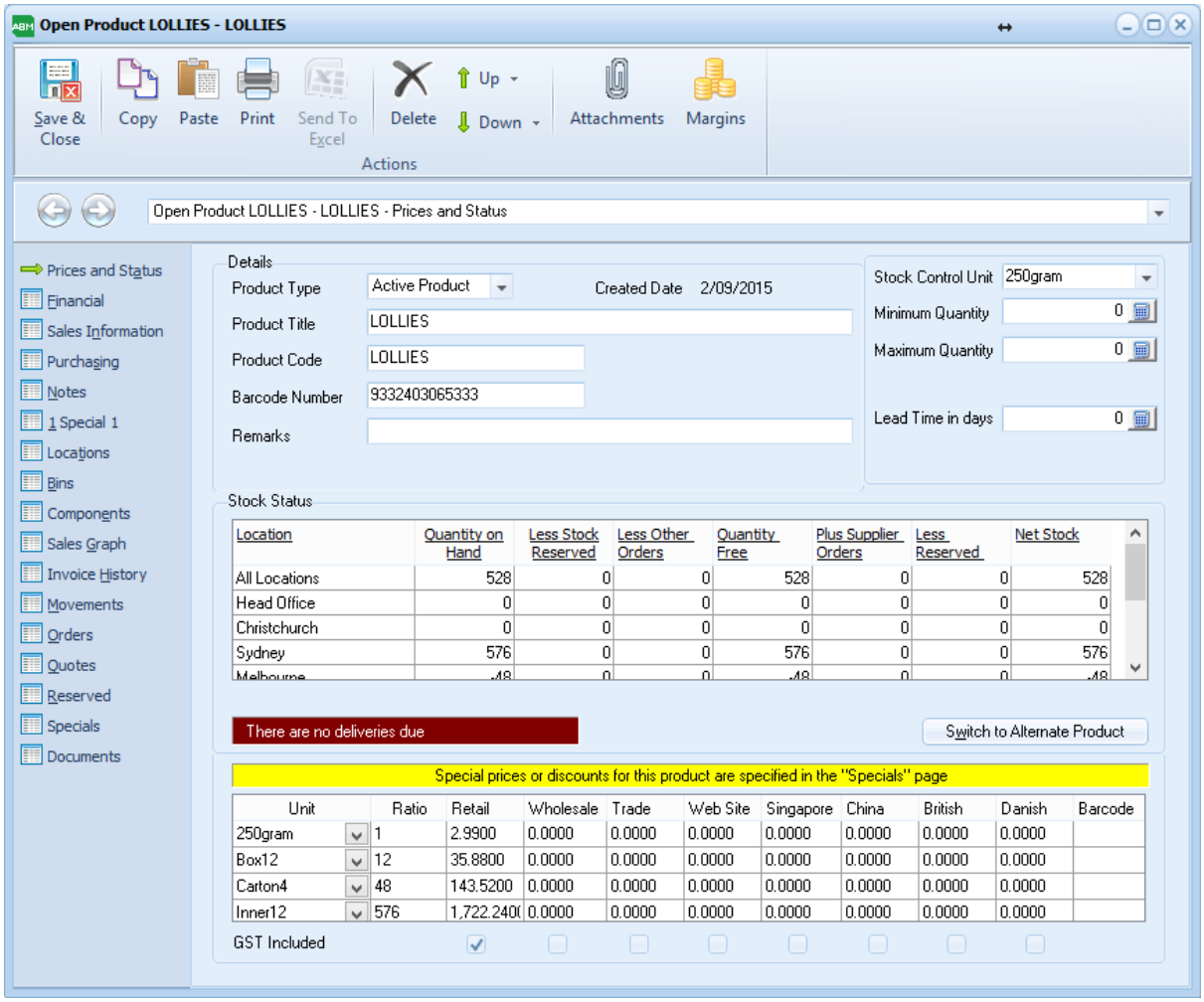

HOW TO READ THE MOVEMENTS TAB INFORMATION

This screen shot shows the movements tab – it is important that you understand that every stock movement of sales, purchases, stocktakes and transfers will all conver the unit of measure sold to the unit of measure of your stock control unit (always the first pack size) to determine th quantity on hand

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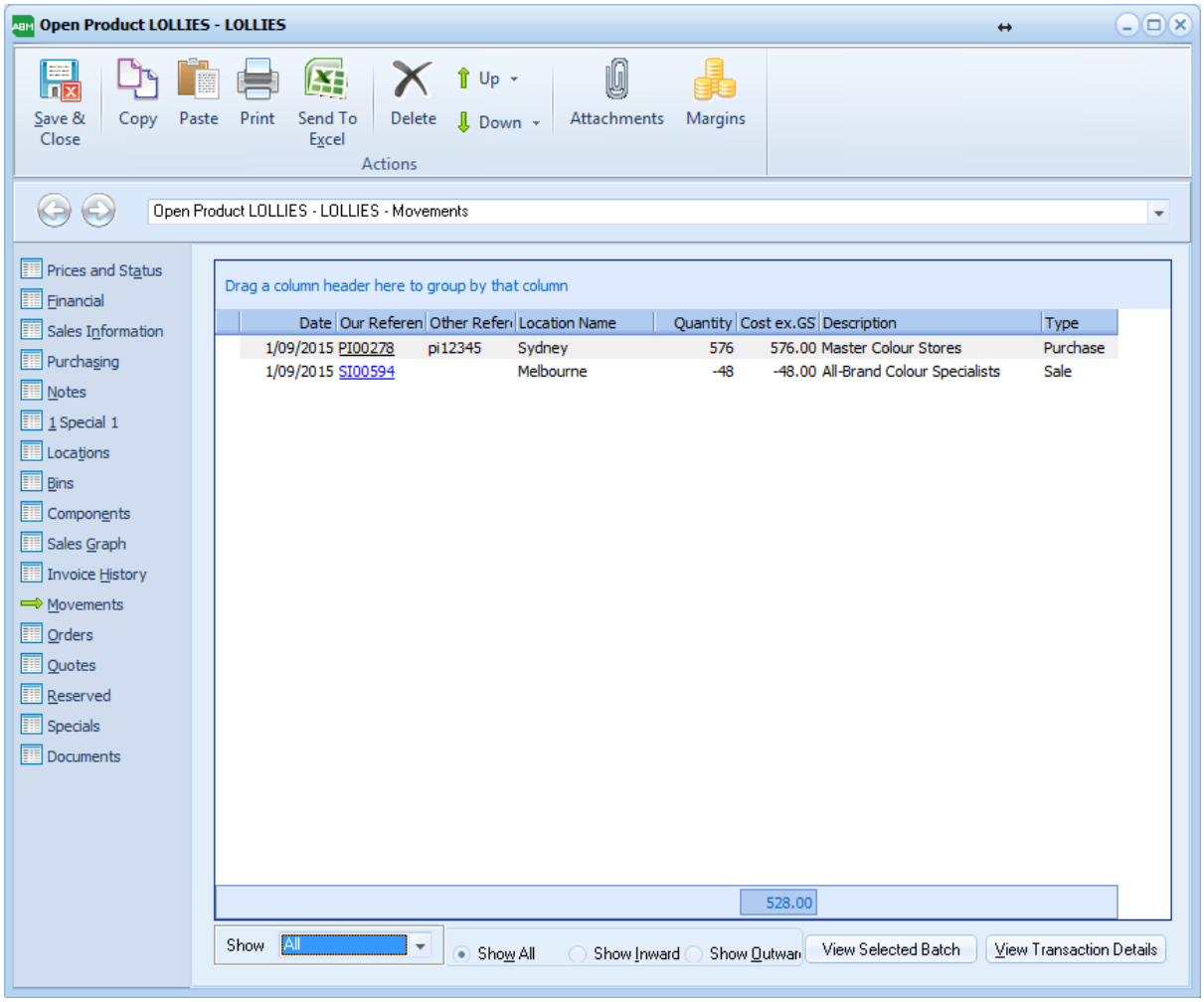

WARNING

Please bear the following warning in mind. If you setup a product then change a pack size or ratio on a unit of measure when you have a stock on hand grater than zero for this product, ABM will not be able to pick upthe fact that you have made a change and the calculations will be incorrect. You must always setup a new product if the pack sizes or ratios are not correct. This is why we recommend you setup a test product first in your play area.

Your customer's invoice may say that you have sold 1 carton, but the movement screen will show a movement of 48 x 250 gram packets.

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STAFF TRAINING

Once your testing is successfully completed, the next step is train all staff that are entering sales and purchase transactions so they have a full understanding of the following:

1) How to purchase and sell different pack sizes
2) How to go to the movements tab and interpret the data about what has been sold or purhcased
3) Have a full understanding that pack sizes and ratios cannot be altered once setup

LIVE SETUP PROCEDURE AND WARNING

The final step is to make sure you understand that you cannot change the unit of measure on an existing ABM product that has a quantity on hand. If you do, ABM will not calculate the correct quantity on hand

You can add UOM's 2 3 and 4, and if you are leaving the stock control unit for UOM1 the same as it is already setup, then you will achieve the correct result.

If UOM1 needs to change, the correct process is as follows:

Transfer all quantities on hand for each warehouse location from the warehouse to elsewhere so there is no quantity on hand for this product.

Delete any sales orders and purchase orders that exist for that product.

Modify the UOM's and ratios as per your test product setup in the play area.

Transfer in the new quantity on hand for each pack size as appropriate.

Check that the quantity on hand for the stock control unit (UOM1) is correct.

Now you can recreate the sales orders and purchase orders with the correct UOM's

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Check the product again to ensure that sales orders and purchase orders outstanding are correct.

Advise all staff to use the correct UOM when entering transactions

FORMS AND REPORTS

You may also wish to contract Ajendico Support Team to modify your sales and purchase forms. By default, the pack size is NOT included on the standard invoice layouts.

Using Crystal report writer, we are able to add this information to your sales and purchase forms to suit your requirements.

Reports such as picking reports and loading lists can also be modified to show in pack sizes. By default all reports will be in the stock control unit.

SPECIAL PRICES

Once additional Pack sizes are setup on a product, you can modify your special prices to use the different units of measure as well. So you may give a special price if a customer buys a quantity of 100 x 250 gram lollies, but you can also give a different special price if they buy Cartons or Inners. Once you have completed the setup of additional pack sizes, we recommend you review special prices as well.

KIT COMPONENTS

Please also check any Kits that you have setup to ensure that if any of them use a product that is sold in multiple sizes, this is taken into consideration when you create the Kits.

BARCODES

ABM allows for a different barcode for each pack size. You can have up to 5 barcodes for any one product in ABM, one master product code and one for each of the four pack sizes. These barcodes can be scanned in Pick and

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pack, unpack and stack, ASPluris and Mobile sales applications and ABM will buy, sell or transfer the correct pack size on every case.

Please ensure you setup all potential barcodes for each product and test thoroughly with all applications in the play area before setting up the product pack sizes in your live database.

For additional information on the setup of Units of Measure (Pack sizes), please contact Ajendico Support Team via support@ajendico.com.au

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