





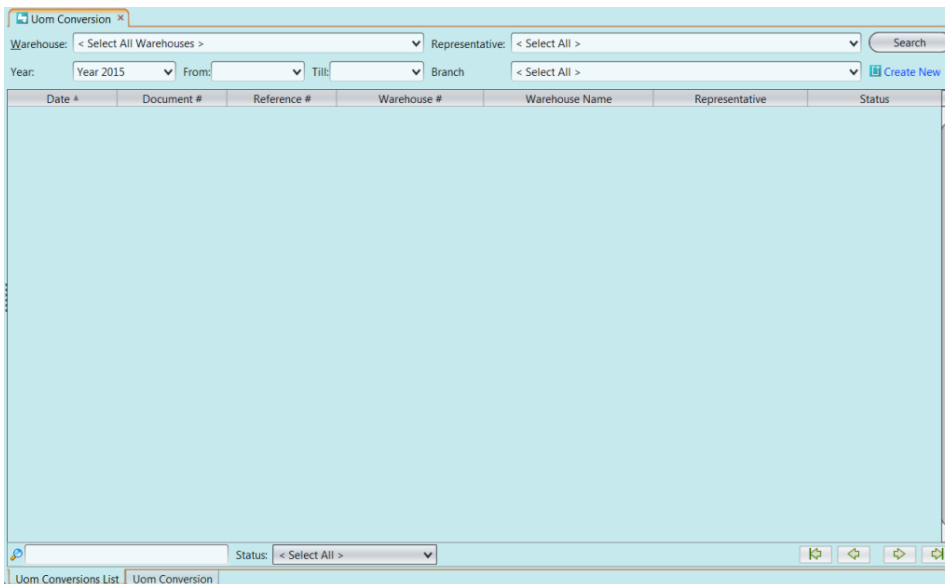
# UOM Conversion

UOM Conversion view allows user to convert product from one type of Unit of Measure (UOM) to another UOM within a warehouse. For example, a box (packet) containing 12 pens is converted to a dozen of individual pen (each), and vice versa.

**Note:** Number of units for an UOM type is setup using “Inventory (Masters) – **Unit of Measurement**”

Below are available actions for the user from “**UOM Conversion**” view:

-  Create new UOM conversion
-  Update UOM conversion details
-  Delete UOM conversion
-  View and search for UOM conversion details



Field Name	Description	Mandatory Information
Document Date	Creation date of the document	Y
Document Number	Document number of the UOM conversion	Y
Reference Number	Code for easy reference search of the document	N
Branch	Name of company's branch	Y
Warehouse	The warehouse of which product's UOM to be converted	Y
Representative	Name of staff assigned to do the UOM conversion	Y
Description	Additional information in regard to the UOM conversion document	N
Product Brand	Select product brand(s) to filter products	N
Filter	Enter keyword(s) to filter / search for products	N
Product	Product code of the item	Y
Description	Description of the item	Y
From UOM	Original type of the item (Unit of Measure)	Y
Batch #	Batch number of the item to convert the UOM	Y
Initial Qty	Initial quantity of the item with original UOM	Y
To UOM	New type of the item (Unit of Measure)	Y
Final Qty	New quantity of the item with the newly converted UOM	Y
Total Quantity	Total quantity for all the items on the UOM conversion document	Y

## Create New UOM Conversion:

1. Click on **“Create New”** at the top right of screen of **“UOM Conversions List”** tab, it will open **“UOM Conversion”** tab with empty form

2. Fill up UOM conversion's information on the top half of screen


The screenshot shows the 'Uom Conversion' form with the following fields:

- Document Date: 21/04/2015
- Document Number: UC-15-04001
- Reference Number: (empty)
- Branch: HQ - Head Office
- Warehouse: WDS1 - WD Solutions
- Representative: EMP004 - Chris Wirianto
- Description: change UOM

3. Click **"Save"** button at the bottom right side of screen

4. Filter the products list by selecting a brand from **"Product Brand"** drop-down list. Add product into the UOM conversion by searching for the product from the product drop-down list in the table on **"Items / Articles"** tab

5. Select a locator from "Locator" drop down list, it will populate the available batches in "Batch #" drop down list in the selected warehouse's system

6. Enter the product's info and click  button to add the product into the UOM conversion

The screenshot shows the 'Items / Articles' table with the following data:

#	Product	Description	Locator	From UOM	Batch#	Initial Qty	To UOM	Final Qty
1	114	Yellow Pad	WD1-Default	Nos - Nos	1	12	PC - Pieces	12
1	114	Yellow Pad	WD1-Default	Nos	1	12	Pieces	12
2	107	Car Polish - Formula	WD1-Default	Tin	1	2	Tube	2

At the bottom of the table, there is a 'Confirm Uom Conversion' button and a 'Total Quantity: 0' indicator.

7. Repeat steps 4-6 to add more products into the UOM conversion

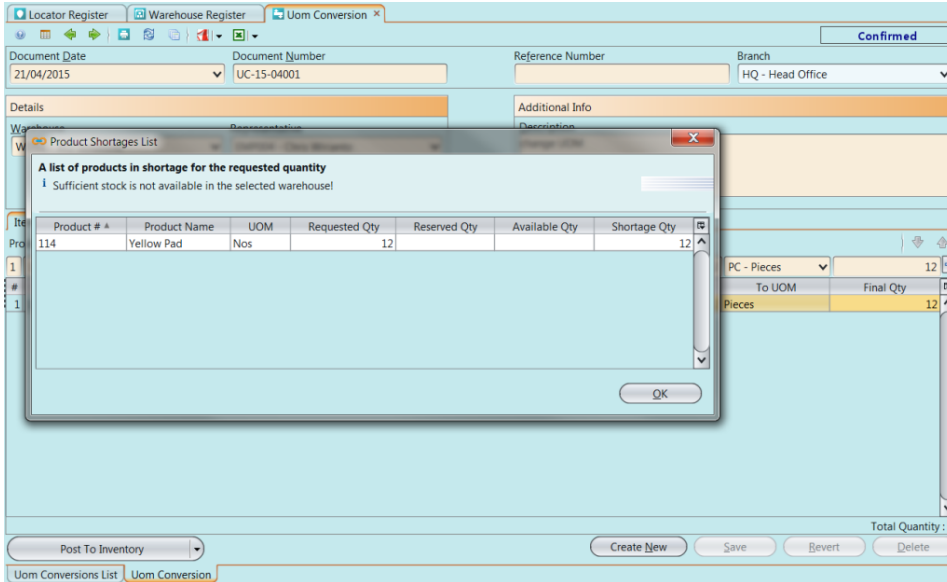
8. Click on **"Notes / Attachments"** tab at the middle of screen to add notes or files attachment for the UOM conversion

9. Click on **"Save"** button at the bottom right of screen when completed

10. Click on **"Confirm UOM Conversion"** button at the

bottom of screen to confirm the UOM conversion

**Note:** if there is not enough quantity to do the UOM conversion, the system will prompt user about it. User will need to do stock transfer to the warehouse where the UOM Conversion process was requested.



11. Click on **“Post To Inventory”** button at the bottom of screen to post the UOM conversion

## Update UOM Conversion Details:

1. Click on **“UOM Conversions List”** tab at the bottom of screen
2. Double click on UOM conversion to be updated, it will bring up the details on **“UOM Conversion”** tab for the selected UOM conversion. If a UOM conversion’s status is **“Confirmed”** or **“Posted”**, right click on the order and reopen / undo posting of the conversion first
3. Make change(s) on the UOM conversion information
4. Click on **“Save”** button at the bottom right of screen when done
5. Click on **“Revert”** button at the bottom right of screen or refresh icon at the top of the screen to

roll back the changes

6. Click on **“Confirm UOM Conversion”** button at the bottom of screen to confirm the UOM conversion

7. Click on **“Post To Inventory”** button at the bottom of screen to post the UOM conversion

## Delete UOM Conversion:

1. Click on **“UOM Conversions List”** tab at the bottom of screen

2. Double click on UOM conversion to be deleted, it will bring up the details on **“UOM Conversion”** tab for the selected conversion. If a UOM conversion’s status is **“Confirmed”** or **“Posted”**, right click on the order and reopen / undo posting of the conversion first

3. Click on **“Delete”** button at the bottom right side of screen

4. Click on **“Yes”** button on the pop-up window to confirm UOM conversion deletion

## View and Search for UOM Conversion Details:

1. Click on **“UOM Conversions List”** tab at the bottom of screen

2. Enter search parameter to filter the result, i.e. type in which warehouse to search for in the **“Warehouse”** text field box or select from drop-down list

3. Result can be sorted alphabetically by clicking the fields’ columns

4. Double click on UOM conversion to view full details of the document, it will bring up the details

on ***“UOM Conversion”*** tab for the selected document

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