



PENTAGON 2000SQL
SOFTWARE EMPOWERING THE ENTERPRISE

Version

8.5

PENTAGON 2000 SOFTWARE

Creating Unit of Measure Conversions

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TITLE:	Creating Unit of Measure Conversions		
PART:	Material Management		
MODULE:	Inventory		
RESPONSIBILITY:	Procedures Specialist, Pentagon 2000	REVISION:	0
APPROVED BY:	Vice President, Operations, Pentagon 2000	EFFECTIVE DATE:	06/04/2012

Purpose

Unit of measure conversions allow the user to stock items in one unit of measure but purchase and/or sell those same items in a different unit of measure.

Overview

This procedure outlines the steps for identifying unit of measure conversions within the Pentagon 2000 system.

Required Modules

- Inventory

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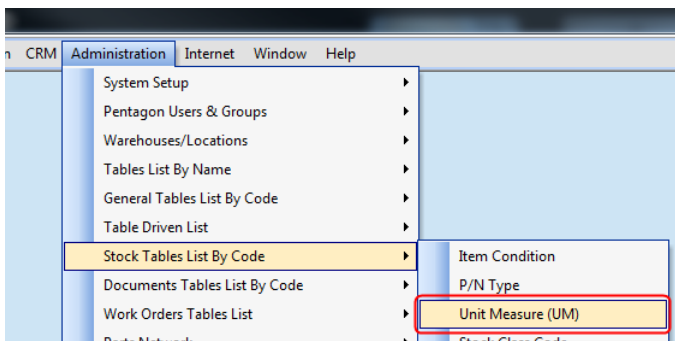
Procedure

1. Identifying a General Unit of Measure Factor:

Unit of measure conversions will be calculated based upon the factors identified within the unit of measure table unless a parts master record unit of measure conversion table with the proper unit of measure exists.

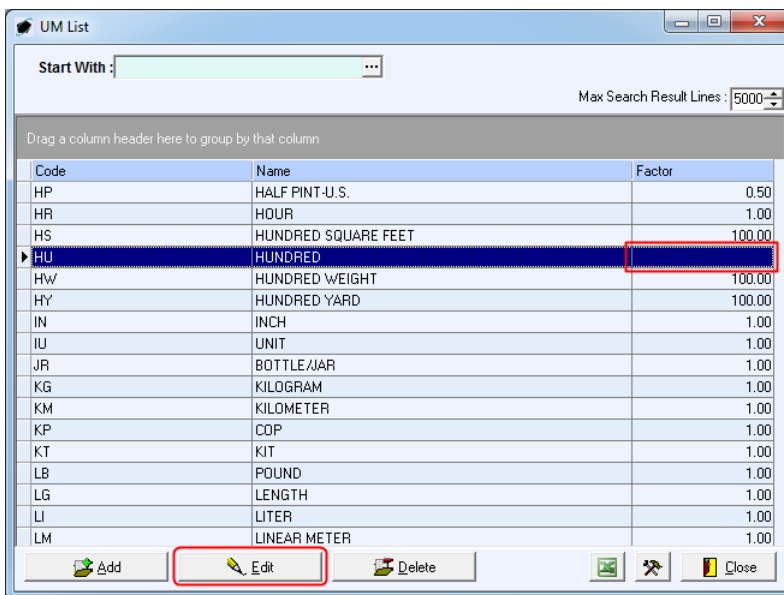
NOTE: General unit of measure conversions are contained within the unit of measure table.

- a. Left-click **Administration** from the toolbar.
- b. Go to **Stock Tables List By Code**.
- c. Left-click **Unit Measure (UM)**.

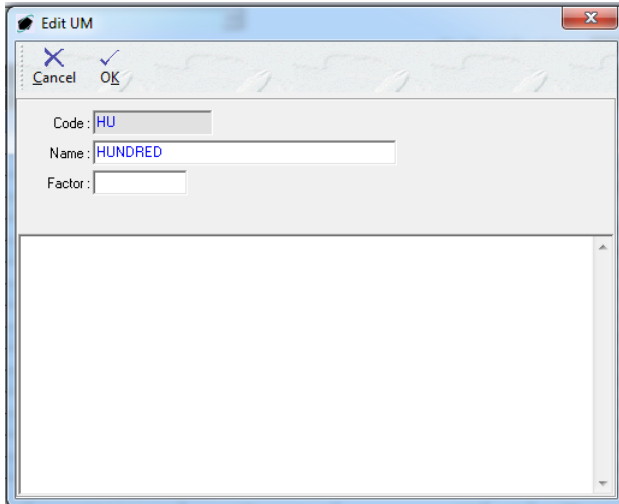


- d. The **UM List** search window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



- e. Left-click the record for which a factor must be identified or modified (the line will be highlighted in blue) and left-click the **Edit** button. The **Insert UM** window for the selected unit of measure will appear.



- f. Left-click the cursor into the **Factor** field and type in the number that represents the appropriate factor.

EXAMPLE: If the unit of measure "EA" has a factor of 1 and the unit of measure "TF" has a factor of 35, then when conversion is made from 1 TF, it will equal 35 EA.

*[1 (quantity) * 35 (factor for TF) / 1 (factor for EA) = 35 EA]*

This conversion will be the same if converting to any other unit of measure with a factor of 1.

EXAMPLE: If the unit of measure "FY" has a factor of 50 and the unit of measure "HU" has a factor of 100, then when conversion is made from 3 HU, it will equal 6 FY.

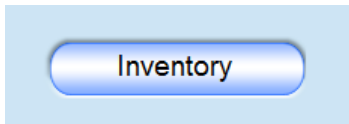
*[3 (quantity) * 100 (factor for HU) / 50 (factor for FY) = 6 FY]*

- g. Left-click the **OK** button at the top of the **Edit UM** window to save the factor and close the window.

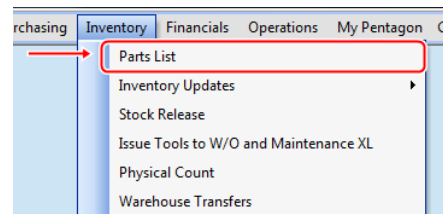


2. Identifying a Part Master Record Unit of Measure Conversion:

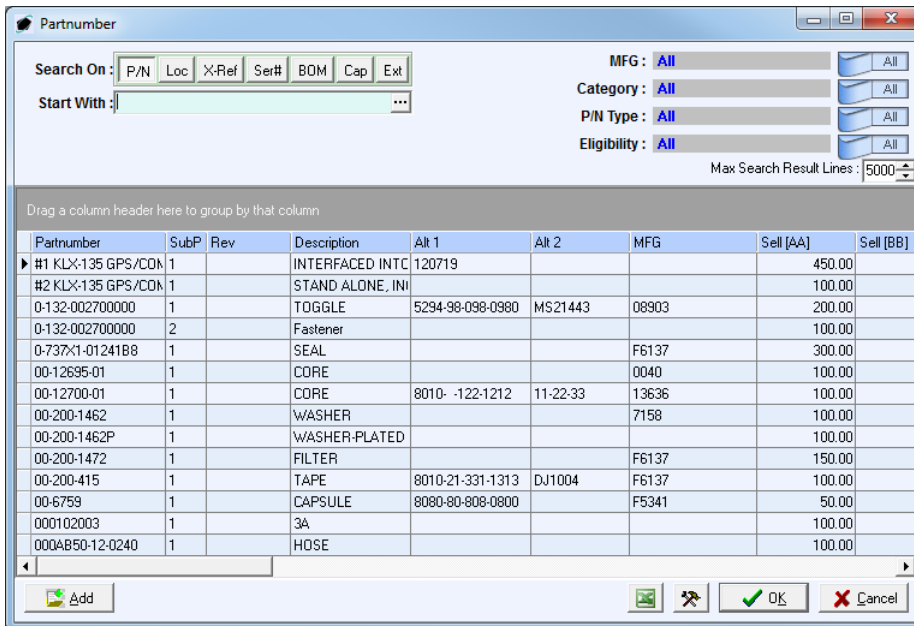
- From the main menu screen, left-click the **Inventory** button.



NOTE: Inventory may also be accessed from the toolbar. Left-click the **Inventory** item from the toolbar and then left-click **Parts List** from the menu options



- The **Partnumber** search window will appear.



Partnumber search window showing search criteria and results.

Search On: P/N Loc X-Ref Ser# BOM Cap Ext

Start With: []

MFG: All Category: All P/N Type: All Eligibility: All

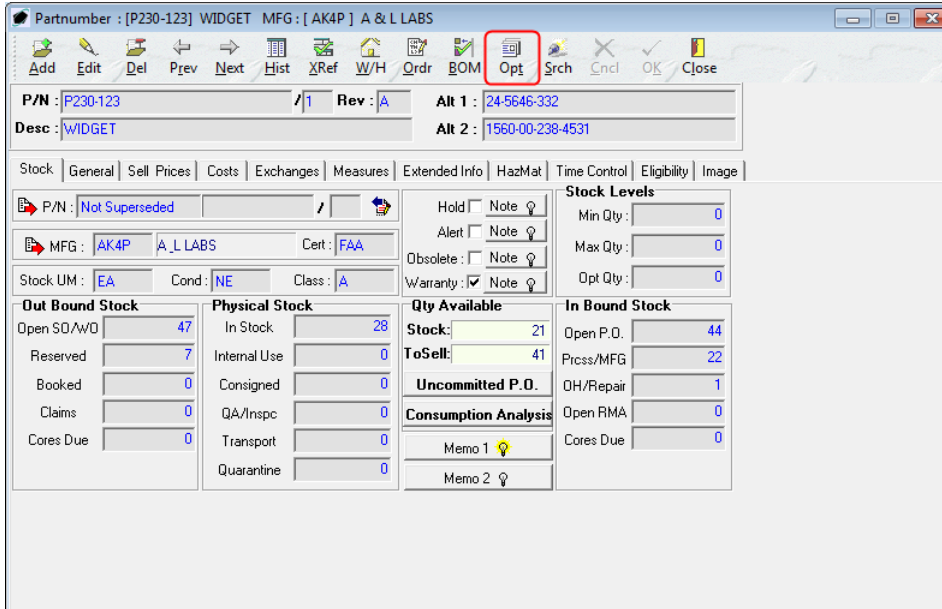
Max Search Result Lines: 5000

Partnumber	SubP	Rev	Description	Alt 1	Alt 2	MFG	Sell [AA]	Sell [BB]
#1 KLX-135 GPS/CON	1		INTERFACED INTC	120719				450.00
#2 KLX-135 GPS/CON	1		STAND ALONE, INI					100.00
0-132-002700000	1		TOGGLE	5294-98-098-0980	MS21443	08903		200.00
0-132-002700000	2		Fastener					100.00
0-737X1-01241B8	1		SEAL			F6137		300.00
00-12695-01	1		CORE			0040		100.00
00-12700-01	1		CORE	8010- -122-1212	11-22-33	13636		100.00
00-200-1462	1		WASHER			7158		100.00
00-200-1462P	1		WASHER-PLATED					100.00
00-200-1472	1		FILTER			F6137		150.00
00-200-415	1		TAPE	8010-21-331-1313	DJ1004	F6137		100.00
00-6759	1		CAPSULE	8080-80-808-0800		F5341		50.00
000102003	1		3A					100.00
0004B50-12-0240	1		HOSE					100.00

Buttons: Add, OK, Cancel

- Navigate to the part master record that requires a unit of measure conversion identified. Select the appropriate record (left-click the record within the search window and left-click the **OK** button; or double-click the file within the explorer screen).

- d. The **Partnumber** window for the selected part master record will appear.



Partnumber : [P230-123] WIDGET MFG : [AK4P] A & L LABS

Add Edit Del Prev Next Hist XRef W/H Qrdr BOM **Opt** Srch Cnd OK Close

P/N : P230-123 / 1 Rev : A Alt 1 : 24-5646-332
Desc : WIDGET Alt 2 : 1560-00-238-4531

Stock General Sell Prices Costs Exchanges Measures Extended Info HazMat Time Control Eligibility Image

P/N : Not Superseded / MFG : AK4P A_L LABS Cert : FAA

Stock UM : EA Cond : NE Class : A

Out Bound Stock
Open SO/WO 47
Reserved 7
Booked 0
Claims 0
Cores Due 0

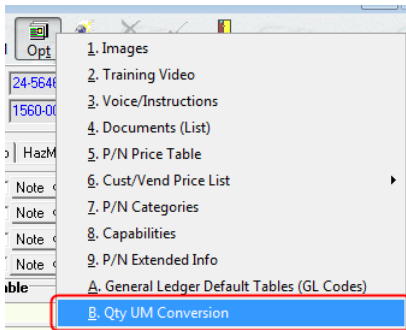
Physical Stock
In Stock 28
Internal Use 0
Consigned 0
QA/Inspc 0
Transport 0
Quarantine 0

Qty Available
Stock 21
To Sell 41
Uncommitted P.O.
Consumption Analysis
Memo 1
Memo 2

Stock Levels
Min Qty : 0
Max Qty : 0
Opt Qty : 0

In Bound Stock
Open P.O. 44
Prcss/MFG 22
OH/Repair 1
Open RMA 0
Cores Due 0

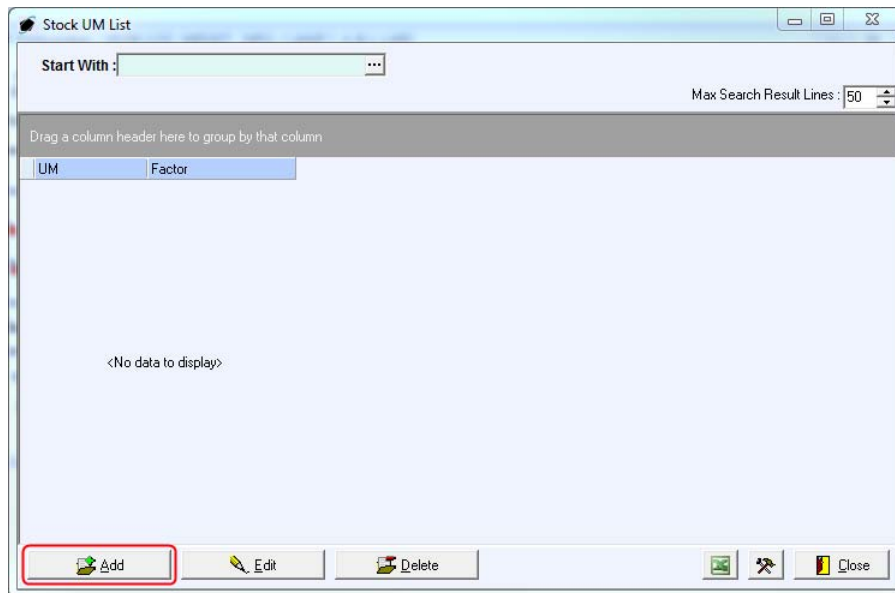
- e. Left-click the **Opt** button from the toolbar on the **Partnumber** window.
- f. Left-click **B. Qty UM Conversion**.



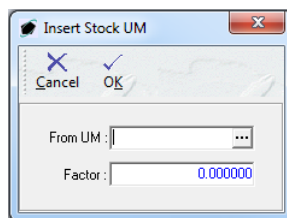
Opt

1. Images
2. Training Video
3. Voice/Instructions
4. Documents (List)
5. P/N Price Table
6. Cust/Vend Price Table
7. P/N Categories
8. Capabilities
9. P/N Extended Info
- A. General Ledger Default Tables (GL Codes)
- B. Qty UM Conversion**

- g. The **Stock UM List** search window will appear.




- h. Left-click the **Add** button. The **Insert Stock UM** window will appear.



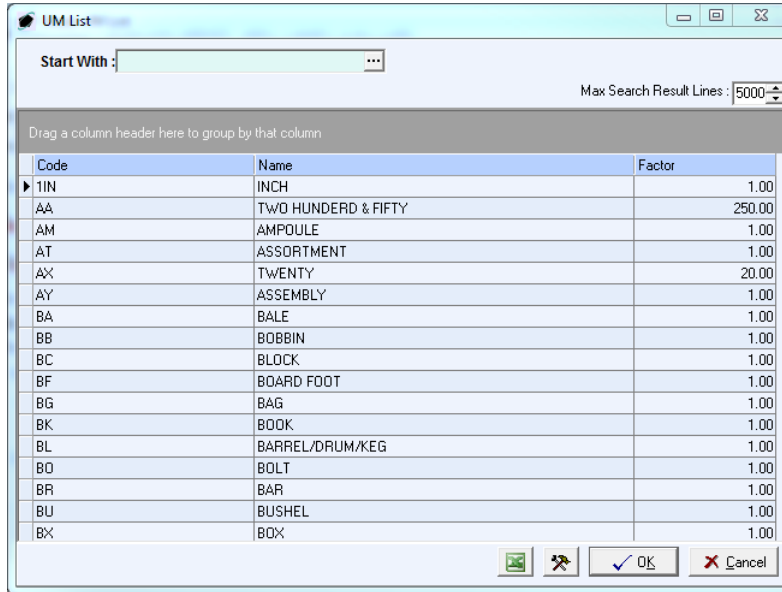
- i. Identify the **From UM** for the conversion.
- i. If the unit of measure exists in the **UM List**:

NOTE: To access this table, left-click **Administration** from the tool bar, go to **Stock Tables List by Code**, and left-click **Unit Measure (UM)**.

1. Left-click the ellipses  in the **From UM** field.

2. The UM List search window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



The screenshot shows the 'UM List' window. At the top, there is a 'Start With' text box and a 'Max Search Result Lines' dropdown set to 5000. Below this is a table with three columns: 'Code', 'Name', and 'Factor'. The table contains 20 rows of unit of measure data. At the bottom right, there are 'OK' and 'Cancel' buttons.

Code	Name	Factor
1IN	INCH	1.00
AA	TWO HUNDRED & FIFTY	250.00
AM	AMPOULE	1.00
AT	ASSORTMENT	1.00
AX	TWENTY	20.00
AY	ASSEMBLY	1.00
BA	BALE	1.00
BB	BOBBIN	1.00
BC	BLOCK	1.00
BF	BOARD FOOT	1.00
BG	BAG	1.00
BK	BOOK	1.00
BL	BARREL/DRUM/KEG	1.00
BO	BOLT	1.00
BR	BAR	1.00
BU	BUSHEL	1.00
BX	BOX	1.00

3. Select the appropriate unit of measure (left-click the line within the search screen and left-click **OK**; or double-click the line within the search screen).
- ii. If the unit of measure does not exist in the **UM List**:
 1. The unit of measure may be added to the **UM List**, or
 2. Left-click the cursor into the **From UM** field and type the appropriate unit of measure.
- j. Left-click the cursor into the **Factor** field and type in the number that represents the appropriate factor for the unit of measure selected identified in the **From UM** field.

NOTE: The unit of measure identified in the **Stock UM** on the **Stock tab** will always have a factor of 1 and will always be a part of the conversion formula.

EXAMPLE: The **Stock UM** is "EA" and the item may be purchased by the case. If the unit of measure "EA" has a factor of 1 and the unit of measure "CS" has a factor of 144, then when conversion is made from 3 CS, it will equal 432 EA.

The factor of 144 means there are 144 EA per 1 CS.

[3 (quantity) * 144 (factor for CS) / 1 (factor for EA) = 432 EA]

EXAMPLE: The Stock UM is "HU" and the item is purchased in pounds. If the unit of measure "HU" has a factor of 1 and the unit of measure "LB" has a factor of 0.3, then when conversion is made from 6 HU, it will equal 1.8 LB.

The factor of 0.3 means there are 0.3 LB per 1 HU.

$[6 \text{ (quantity)} * 0.3 \text{ (factor for HU)} / 1 \text{ (factor for HU)} = 1.8 \text{ LB}]$

- k. Left-click the **OK** button at the top of the **Edit Stock UM** window to save the factor and close the window.

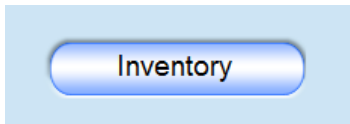


- l. Left-click the **Close** button in the lower right of the **Stock UM List** window to close the window.

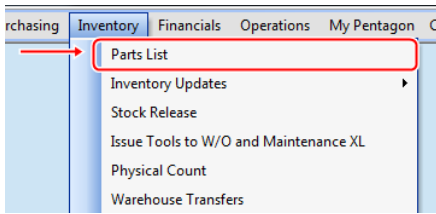


3. Editing a Part Master Record Unit of Measure Conversion:

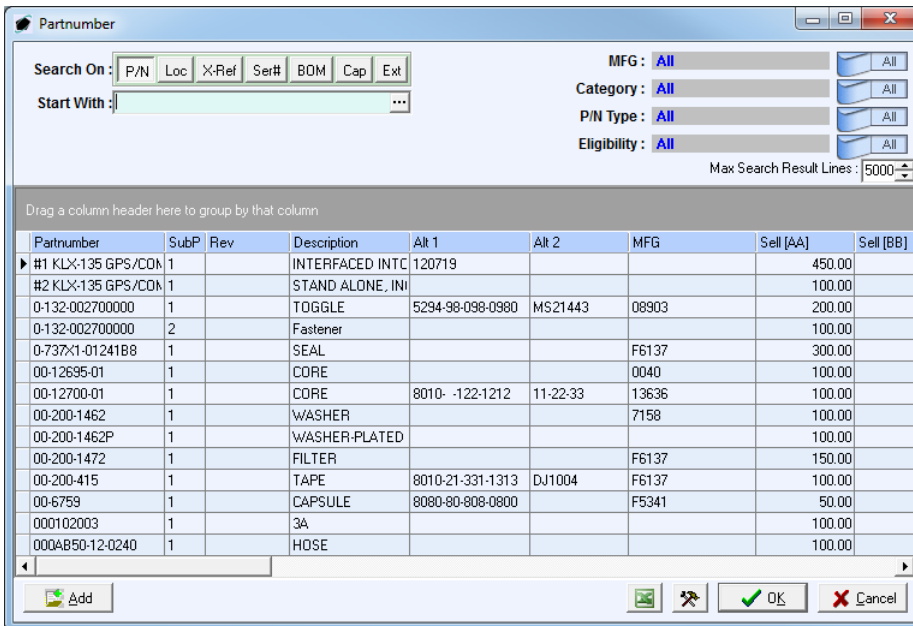
- From the main menu screen, left-click the **Inventory** button.



NOTE: Inventory may also be accessed from the toolbar. Left-click the **Inventory** item from the toolbar and then left-click **Parts List** from the menu options



- The **Partnumber** search window will appear.



Partnumber search window showing search criteria and results.

Search On: P/N Loc X-Ref Ser# BOM Cap Ext

Start With: []

MFG: All Category: All P/N Type: All Eligibility: All

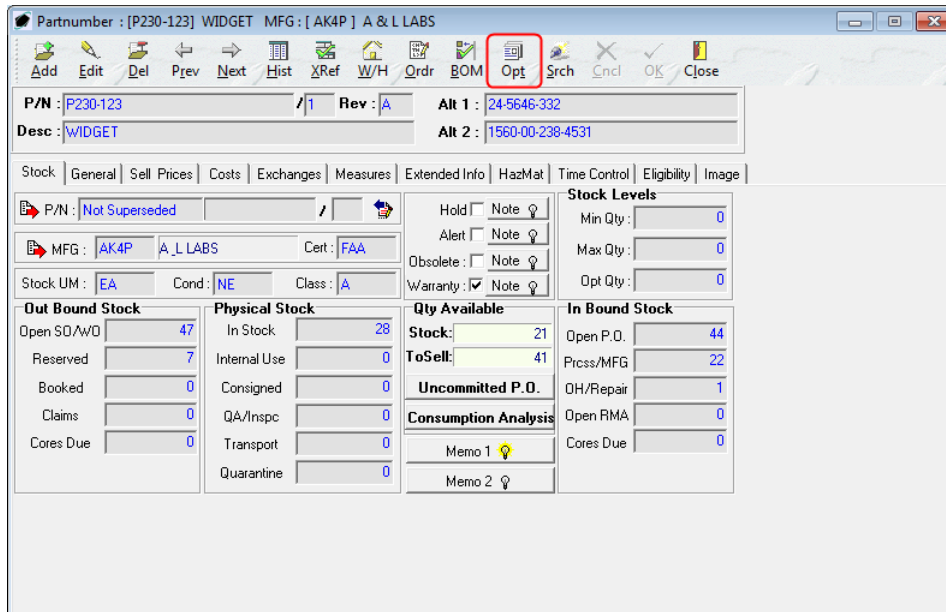
Max Search Result Lines: 5000

Partnumber	SubP	Rev	Description	Alt 1	Alt 2	MFG	Sell [AA]	Sell [BB]
#1 KLX-135 GPS/CON	1		INTERFACED INTC	120719				450.00
#2 KLX-135 GPS/CON	1		STAND ALONE, INI					100.00
0-132-002700000	1		TOGGLE	5294-98-098-0980	MS21443	08903		200.00
0-132-002700000	2		Fastener					100.00
0-737X1-01241B8	1		SEAL			F6137		300.00
00-12695-01	1		CORE			0040		100.00
00-12700-01	1		CORE	8010- -122-1212	11-22-33	13636		100.00
00-200-1462	1		WASHER			7158		100.00
00-200-1462P	1		WASHER-PLATED					100.00
00-200-1472	1		FILTER			F6137		150.00
00-200-415	1		TAPE	8010-21-331-1313	DJ1004	F6137		100.00
00-6759	1		CAPSULE	8080-80-808-0800		F5341		50.00
000102003	1		3A					100.00
0004B50-12-0240	1		HOSE					100.00

Buttons: Add, OK, Cancel

- Navigate to the part master record that requires a unit of measure conversion modified. Select the appropriate record (left-click the record within the search window and left-click the **OK** button; or double-click the file within the explorer screen).

- d. The **Partnumber** window for the selected part master record will appear.



Partnumber : [P230-123] WIDGET MFG : [AK4P] A & L LABS

Tools: Add, Edit, Del, Prev, Next, Hist, XRef, W/H, Qrd, BOM, **Opt**, Srch, Cnd, OK, Close

P/N : P230-123 / 1 Rev : A Alt 1 : 24-5646-332
Desc : WIDGET Alt 2 : 1560-00-238-4531

Tabs: Stock | General | Sell Prices | Costs | Exchanges | Measures | Extended Info | HazMat | Time Control | Eligibility | Image

P/N : Not Superseded /

MFG : AK4P A_L LABS Cert : FAA

Stock UM : EA Cond : NE Class : A

Hold ☐ Note ☐
Alert ☐ Note ☐
Obsolete ☐ Note ☐
Warranty ☒ Note ☐

Stock Levels

Min Qty : 0
Max Qty : 0
Opt Qty : 0

Out Bound Stock

Open SO/WO 47
Reserved 7
Booked 0
Claims 0
Cores Due 0

Physical Stock

In Stock 28
Internal Use 0
Consigned 0
QA/Inspc 0
Transport 0
Quarantine 0

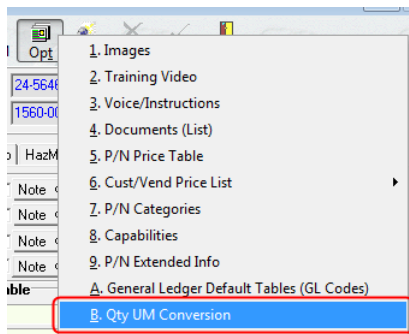
Qty Available

Stock 21
To Sell 41
Uncommitted P.O.
Consumption Analysis
Memo 1 ☐
Memo 2 ☐

In Bound Stock

Open P.O. 44
Prcss/MFG 22
OH/Repair 1
Open RMA 0
Cores Due 0

- e. Left-click the **Opt** button from the toolbar on the **Partnumber** window.
- f. Left-click **B. Qty UM Conversion**.

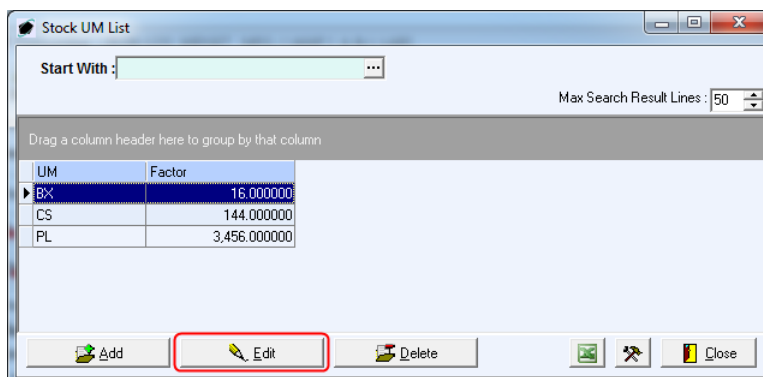


Opt

- 1. Images
- 2. Training Video
- 3. Voice/Instructions
- 4. Documents (List)
- 5. P/N Price Table
- 6. Cust/Vend Price List
- 7. P/N Categories
- 8. Capabilities
- 9. P/N Extended Info
- A. General Ledger Default Tables (GL Codes)
- B. Qty UM Conversion**

- g. The **Stock UM List** search window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



Stock UM List

Start With :

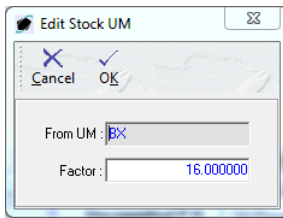
Max Search Result Lines : 50

Drag a column header here to group by that column

UM	Factor
BK	16.000000
CS	144.000000
PL	3,456.000000

Buttons: Add, **Edit**, Delete, Close

- h. Left-click the record for which a factor must be modified (the line will be highlighted in blue) and left-click the **Edit** button. The **Edit Stock UM** window for the selected unit of measure will appear.



- i. Left-click the cursor into the **Factor** field and type in the number that represents the appropriate factor for the unit of measure selected identified in the **From UM** field.

NOTE: The unit of measure identified in the **Stock UM** on the **Stock tab** will always have a factor of 1 and will always be a part of the conversion formula.

EXAMPLE: The **Stock UM** is "EA" and the item may be purchased by the case. If the unit of measure "EA" has a factor of 1 and the unit of measure "CS" has a factor of 144, then when conversion is made from 3 CS, it will equal 432 EA.

The factor of 144 means there are 144 EA per 1 CS.

[3 (quantity) * 144 (factor for CS) / 1 (factor for EA) = 432 EA]

EXAMPLE: The Stock UM is "HU" and the item is purchased in pounds. If the unit of measure "HU" has a factor of 1 and the unit of measure "LB" has a factor of 0.3, then when conversion is made from 6 HU, it will equal 1.8 LB.

The factor of 0.3 means there are 0.3 LB per 1 HU.

[6 (quantity) * 0.3 (factor for HU) / 1 (factor for HU) = 1.8 LB]

- j. Left-click the **OK** button at the top of the **Edit Stock UM** window to save the factor and close the window.

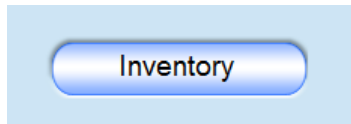


- k. Left-click the **Close** button in the lower right of the **Stock UM List** window to close the window.

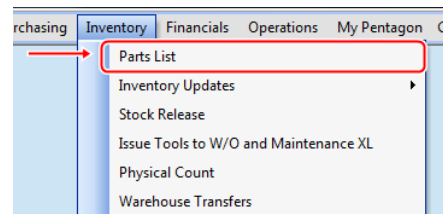


4. Deleting a Part Master Record Unit of Measure Conversion:

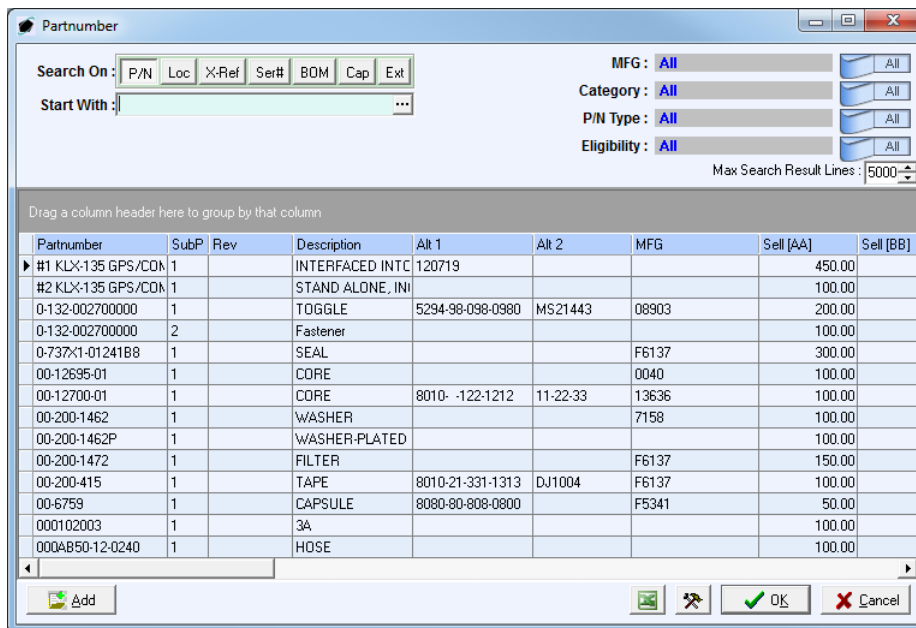
- a. From the main menu screen, left-click the **Inventory** button.



NOTE: Inventory may also be accessed from the toolbar. Left-click the **Inventory** item from the toolbar and then left-click **Parts List** from the menu options



- b. The **Partnumber** search window will appear.



Partnumber

Search On: P/N Loc X-Ref Ser# BOM Cap Ext

Start With:

MFG: All

Category: All

P/N Type: All

Eligibility: All

Max Search Result Lines: 5000

Drag a column header here to group by that column

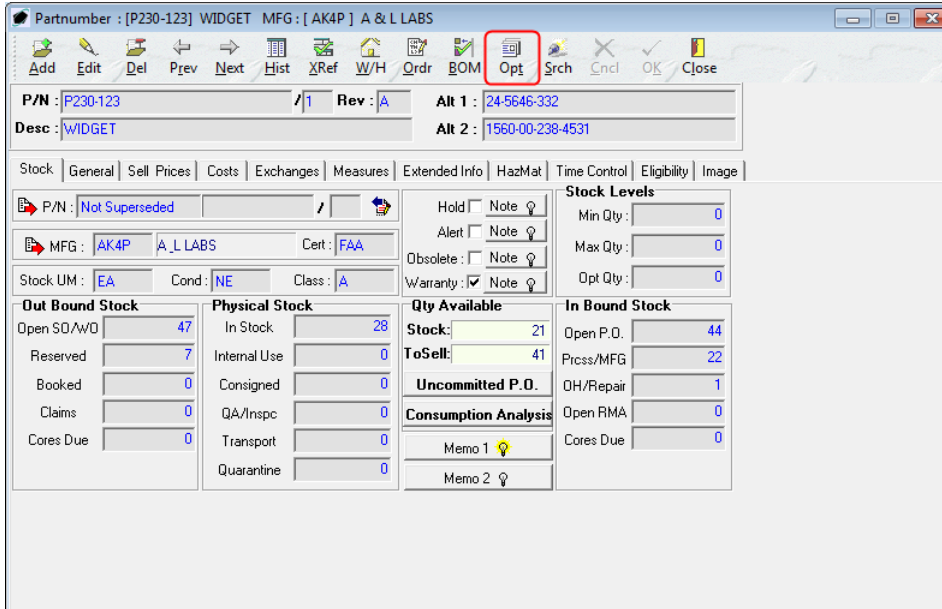
Partnumber	SubP	Rev	Description	Alt 1	Alt 2	MFG	Sell [AA]	Sell [BB]
#1 KLX-135 GPS/CON	1		INTERFACED INTC	120719				450.00
#2 KLX-135 GPS/CON	1		STAND ALONE, INI					100.00
0-132-002700000	1		TOGGLE	5294-98-098-0980	MS21443	08903		200.00
0-132-002700000	2		Fastener					100.00
0-737X1-01241B8	1		SEAL			F6137		300.00
00-12695-01	1		CORE			0040		100.00
00-12700-01	1		CORE	8010- -122-1212	11-22-33	13636		100.00
00-200-1462	1		WASHER			7158		100.00
00-200-1462P	1		WASHER-PLATED					100.00
00-200-1472	1		FILTER			F6137		150.00
00-200-415	1		TAPE	8010-21-331-1313	DJ1004	F6137		100.00
00-6759	1		CAPSULE	8080-80-808-0800		F5341		50.00
000102003	1		3A					100.00
0004B50-12-0240	1		HOSE					100.00

Add

OK Cancel

- c. Navigate to the part master record that requires a unit of measure conversion deleted. Select the appropriate record (left-click the record within the search window and left-click the **OK** button; or double-click the file within the explorer screen).

- d. The **Partnumber** window for the selected part master record will appear.



Partnumber : [P230-123] WIDGET MFG : [AK4P] A & L LABS

Tools: Add, Edit, Del, Prev, Next, Hist, XRef, W/H, Qdr, BOM, **Opt**, Srch, Cnd, OK, Close

P/N : P230-123 / 1 Rev : A Alt 1 : 24-5646-332
Desc : WIDGET Alt 2 : 1560-00-238-4531

Tabs: Stock | General | Sell Prices | Costs | Exchanges | Measures | Extended Info | HazMat | Time Control | Eligibility | Image

P/N : Not Superseded / MFG : AK4P A_L LABS Cert : FAA

Stock UM : EA Cond : NE Class : A

Out Bound Stock

Open SO/WO	47
Reserved	7
Booked	0
Claims	0
Cores Due	0

Physical Stock

In Stock	28
Internal Use	0
Consigned	0
QA/Inspc	0
Transport	0
Quarantine	0

Qty Available

Stock	21
To Sell	41
Uncommitted P.O.	
Consumption Analysis	
Memo 1	
Memo 2	

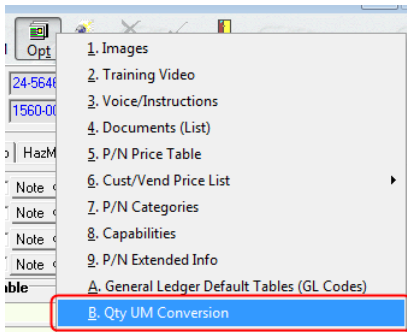
Stock Levels

Min Qty	0
Max Qty	0
Opt Qty	0

In Bound Stock

Open P.O.	44
Prcess/MFG	22
OH/Repair	1
Open RMA	0
Cores Due	0

- e. Left-click the **Opt** button from the toolbar on the **Partnumber** window.
- f. Left-click **B. Qty UM Conversion**.

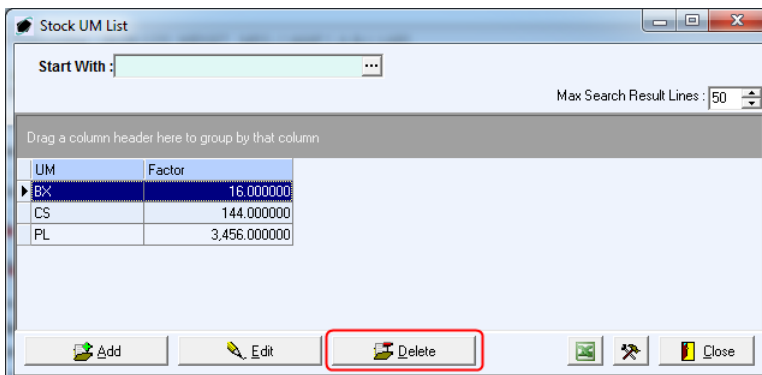


Opt

1. Images
2. Training Video
3. Voice/Instructions
4. Documents (List)
5. P/N Price Table
6. Cust/Vend Price List
7. P/N Categories
8. Capabilities
9. P/N Extended Info
- A. General Ledger Default Tables (GL Codes)
- B. Qty UM Conversion**

- g. The **Stock UM List** search window will appear.

NOTE: The values shown in the table appearing in this procedure are not standard values and may not reflect the values required by every organization.



Stock UM List

Start With :

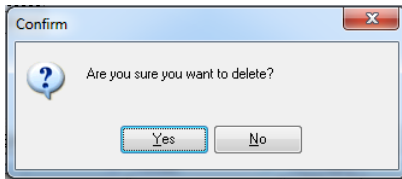
Max Search Result Lines : 50

Drag a column header here to group by that column

UM	Factor
BK	16.000000
CS	144.000000
PL	3,456.000000

Buttons: Add, Edit, **Delete**, Close

- h. Left-click the record to be deleted (the line will be highlighted in blue) and left-click the **Delete** button.
- i. A **Confirm** window will appear.



- j. Left-click **Yes** to delete the record.
- k. Left-click the **Close** button in the lower right of the **Stock UM List** window to close the window.

