

Knowledgebase > SalesPad > Setup > Catch Weights

# Catch Weights

Megan De Freitas - 2024-11-22 - Setup

# **Catch Weights**

Most commonly used in food service, using catch weights adds the ability to stock inventory by one unit of measure (case/each) and sell to the customer by another (weight). For example, a company can stock food items by the case, and pull the items out of inventory by the case, and using catch weights, can easily sell the items by the pound.

The below example will illustrate the use of catch weights:

- Adding catch weight items to your inventory
- Generating a vendor purchase order to purchase a catch weight item
- Receiving the catch weight item
- Adding a catch weight item to a sales order document

Before we walk through the process, the following settings must be configured in the Settings module (filter to "catch" to find all quickly):

۵	Catch Weights								
	Catch Weight Divisor	1							
	Catch Weight Error Hold								
	Catch Weight Item								
	Catch Weight UOfMs	LB							
۵	Receiving								
	Catch Weight Separation Character	_							
۵	Sales Entry								
	Tracking Catch All Link	http://boxoh.com/?t=							

*Catch Weight Divisor* - If needed, enter a divisor for the weight. So, in the above example 12345\_321 with a Catch Weight Divisor of 100, the actual weight will be 3.21 lbs. or kg. (In this example we have a divisor of 1, so we just need to add the actual weight. For example IMP-PARM\_2.15 = Parmesan Cheese weighs 2.15.5 lbs.)

*Catch Weight Error Hold* (Optional) - Specify a process hold to apply to a document if there is an error when processing catch weight items.

*Catch Weight Item* - Specify a Dynamics GP item number to use for the catch weight line, or leave blank to use a non- inventory item. Or if you wanted to track the cost of goods sold for a specific item, you can add that item number here to track back all the variable costs. However, the item would still be unable to be tracked as an inventory item.

*Catch Weight UOfMs* - Set the sell by unit of measure for catch weight, LBS or KG or both (LBS;KG).

*Catch Weight Separation Character* (under Receiving) - Specify the character or characters used to separate the lot number and weights when committing the catch weights. For example, use "\_" as a separation character, and the number will appear as 12345\_321, with 12345 being the lot number and 321 being the weight.

**Note**: The user must log out of SalesPad and then back in for settings changes to take place.

### Security settings

Turn off Auto Assign Lot Number for the Receiving module in SalesPad.

<b>V</b>	Receiving*

	🔽 Contains([Name], 'receiving') 💌		
۵	Misc		
	Allow DropShip Receiving	True	
	Allow Edit Cost	True	
	Auto Assign Lot Number	False	
	Auto Assign Serial	False	
	Auto Save on Barcode scan	True	

#### Step 1 - Adding Catch Weight Item to your Inventory

The following items have been created in the item master as catch weight items (adding (CW) to the item tells SalesPad that this is a catch weight item). Catch weight items are lot controlled.

- Turkey, Frozen, 2 per case (CW)
- Imported Parmesan Cheese, 2 per case (CW)

Item Information Vendor Information (2) Warehouse & Resource									
Properties									
Item Number:	TKY-001								
Copy From Item:									
Copy Item Stand	ard Pricing								
(CW) must be adde SalesPad to know	ed to the item description in order for the item is a Catch Weight Item								
Item Description:	Turkey, Frozen, 2 per case (CW)								
Short Description:	Turkey								
Generic Description:	Meat								
Replaced By:									
Class ID:	<b>•</b>								
Class ID: Track:	Lot Numbers 🗸								
Class ID: Track:	Lot Numbers  CW Items are Lot Controlled								
Class ID: Track: Item Type:	Lot Numbers     Image: CW ltems are Lot Controlled       Sales Inventory     Image: Cwitzer								
Class ID: Track: Item Type: Shipping Weight:	Image: Lot Numbers     Image: Lot Controlled       CW Items are Lot Controlled       Sales Inventory       24								
Class ID: Track: Item Type: Shipping Weight: U Of M Schedule:	▼       Lot Numbers     ▼       CW Items are Lot Controlled       Sales Inventory     ▼       24        CASE/LB     ▼								
Class ID: Track: Item Type: Shipping Weight: U Of M Schedule: Selling UOfM:	▼       Lot Numbers     ▼       CW Items are Lot Controlled       Sales Inventory     ▼       24        CASE/LB     ▼       CASE     ▼								
Class ID: Track: Item Type: Shipping Weight: U Of M Schedule: Selling UOfM: Price Level:	▼       Lot Numbers     ▼       CW Items are Lot Controlled       Sales Inventory     ▼       24        CASE/LB     ▼       CASE     ▼       RETAIL     ▼								
Class ID: Track: Item Type: Shipping Weight: U Of M Schedule: Selling UOfM: Price Level: Standard Cost:	Lot Numbers   CW Items are Lot Controlled   Sales Inventory   24   CASE/LB   CASE   RETAIL   0.00   Current Cost:   15.60								

Step 2 - Generate PO to order the Catch Weight Specific Goods from Vendor

- Add CW items.
- Choose Location.
- Click Save.

Line	ine Items Notes Addresses User Fields Links Receipts Email Audit											
De	Details											
	🔣 New   🚆 Cancel   🟥 Insert   📳 Update Missing Vendor Items											
-	Item #	Qty	UOfM	Location	Description	Vendor Item#	Comment	Unit Cost	Extd. Cost			
	TKY-001	5	CASE	WAREHOUSE	Turkey, Frozen, 2 per ca	TKY-001		15.60	78.00			
	IMP-PA	. 2	CASE	NORTH	Imported Parmesan Che	IMP-PARM		16.00	32.00			

SalesPad will track the lot numbers for the catch weight item.

Item Inventory	Item Properties	Item Sales	Item Purchases	Item Notes	Item Serial/Lot I	Numbers Item Analy	sis Item Serial Attributes	Item User Fields	
Lot Num	Location	Bin	Qty	(	Qty Allocated V	Qty Type	Expiration Date	Date Received	Lot Attribute 2
2003 24.00	WAREHOUS	E DOCK	8	3	2	On Hand		2/16/2009	
8001-24.0	WAREHOUS	E DOCK	30	0	1	On Hand		5/22/2010	
8001-24.5	WAREHOUS	- роск	10	1	0	On Hand		5/22/2010	

Step 3 - Receiving Window in SalesPad to Receive the CW items

Open the Receiving window in SalesPad. Search for PO2598; items on that PO will be displayed on the grid. Enter quantity to receive and serial/lot(s).

To add the weight for serial/lot(s), use "\_" as a separation character to separate the item from what the weight of that item is.

- For the cheese, IMP-PARM, we are receiving both of the cheese at a weight of 2.15 Ibs (they arrived weighing the same) therefore we need to enter: IMP-PARM\_2.15.
- For the turkey, TKY-001, all 5 had varying weights, therefore we need to enter received quantities 5 times with the varying weights.
  - TKY-001\_8.5, TKY-001\_9.6, TKY\_001\_7.2, TKY-001\_5.0 (So
    - the weights received are in lbs. and are 8.5 lbs., 9.6 lbs., 7.2 lbs., etc.)

Do this for each item in the case until all items have been received.

📑 Close   🧆 Search	]] Close   🗞 Search   🚽 Save   💠 Clear 🥩 Receive Selected														
Search Criteria															
Vendor: PO#: Receive Selected Barcode Scan:															
Vendor	PO Type	PO#	Req. Date	Item Number	Item Description	NI	Ordered	Unit Cost	Extended	Received	To Recv.	Vendor	Serial/Lot(s)	Rcpt. Site	/ Bin
															T
Advanced Office S	STANDARD	PO2598	10/16/2013	IMP-PARM	Imported Parmesan C		2	16.00	32.00	0	2		IMP-PARM_215 A	NORTH	
Advanced Office S	STANDARD	PO2598	10/16/2013	TKY-001	Turkey, Frozen, 2 per		5	15.60	78.00	0	1	1	TKY-001-850	WAREHOUSE	

Once you enter the quantity and serial/lot information, click **Save**, then click **Receive Selected**.

A blue line with receipt details will appear below the line items you have received. A summary of receipts is listed at the bottom on this window.

🙇 Custor	mer Search 🗴	🛛 🌡 🕹 Card: [	AARONFITO	001] Aaron Fitz	Electrical X	Receiving 🗶							
📑 Close	🕸 Search	🛃 Save	🗢 Clea	r <i> R</i> eceive	Selected								
Search Cri	iteria		•										
Vendor:					PO#: Receiv	e Selected						Barcode Scar	n: []
Vendor		PO Type	PO#	Req. Date	Item Number	Item Description	NI	Ordered	Unit Cost	Extended	Received	To Recv.	en
Advanced	d Office S	STANDARD	PO2598	10/16/2013	TKY-001	Turkey, Frozen, 2 per		5	15.60	78.00	4	1	
Recei	ived 1 of 'TKY-	001' on 'RCT1	1746' of rec	eipt type 'Shipme	enť.								
										_			
10/16/20	13 3:06:35 PM	1: P0#: PO25	98, Vendor:	Advanced Offic	e Systems, Rec	eived 1 of 'TKY-001' on 'RC	T1746	of receipt t	vpe 'Shipmen'	ε.			_
10/16/20	13 3:06:16 PM	1: P0#: PO25	98, Vendor:	Advanced Offic	e Systems, Rec	eived 1 of 'TKY-001' on 'RC eived 1 of 'TKY-001' on 'RC	T1746	of receipt t	ype 'Shipmen'	ť.			
10/20	10 010010011		soy rendon	navanced onne	e o jotembi rece			, or receipt t	The empiricity				

If receiving multiple lines that have the same weight, users have an option to make this process quicker by right clicking in the grid to receive multiple lines that are being received in the same location, bin, etc.

Step 5 - Post Receipt of goods in GP

	-					· ·
🙀 Receivings Tra	insaction Entry	-		and the second se		x
File Edit T	ools View Option	ns Help			sa Fabrikam, Inc. 4/12/	2017
🔚 Save X	<u>D</u> elete 🛛 🔂 Vojd	🐔 <u>P</u> ost	🛵 A <u>u</u> to-	Rev E Reports	Fe <b>I</b> III	Ż
Туре:	Shipment	•		Vendor ID	ADVANCED0001 🛛 🔎 🖹	
Receipt No.	RCT1746	,C	) 🗋	Name	Advanced Office Systems	
Vendor Doc. No.	1			Currency ID	Z-US\$ 🔊 🗋	) 🔶
Date	10/16/2013	· · · · · · · · · · · · · · · · · · ·	•			
Batch ID	SALESPAD RC	,c	) 🗋 🔶 👘			
			·			
PO Number	P 🗋 Item	6	) 🔎 🗋 🔶	Qty Shipped 🛛 👄 🗇	Unit Cost 🔶	$\otimes$
Uof M 🔎	<u>Site ID</u> 🖉 🗋 Qua	antity Ordered		Quantity Invoiced	Extended Cost	$\otimes$
Description				Previously Shipped	Previously Invoiced	
P02598	TKY-001			1.00	\$15.60	
CASE	WAREHOUSE		5.00	0.00	\$15.60	
Turkey, Frozen, 2	per case (CW)			4.00	0.00	Ξ
P02598	TKY-001			1.00	\$15.60	
CASE	WAREHOUSE		5.00	0.00	\$15.60	
Turkey, Frozen, 2	per case (CW)			4.00	0.00	-
1099 Amount		\$0.00	C.	Subtotal	\$46.80	

#### Step 6 - Generate Sales document

Add catch weight items to the sales order and note how two lines are automatically generated.

- IMP-PARM is the inventory item which was received in into inventory as a case.
- CW:IMP-PARM is the catch weight item which allows users to sell the inventory item in another unit (still sold as a case, but broken down by UOM which can be used to track back the cost of goods sold).

Click **Save** after all line items have been added to the sales order.

📑 Close 🛛 😽	🗓 Close   🖶 Save   🍪 Print   🛄   🥵 Fulfillment   🛞 Profitability   🥒 Attach Sales Line to PO 🛛 🧩 Delete   🗅 Copy   🍰 Allocate 🛞 Un Allocate   🦄 Dynamics GP											
Document Prope	p6891		ORDER (DISTRIBUTION)			Shipping Add	iress lectrical		Additional Batch/O:	Properties	ORDER	
Customer #: Cust PO:	AARONFIT0001	3 SalesPad	×	Ţ	Robert Fitz 1201 56th / Chicago, IL	Robert Fitz Jr. 1201 56th Ave. Chicago, IL 60603-0776			rice Level: RETAIL		0	
Req Ship:	10/16/2013				•	P:(312) 555 F:(312) 555	-0102 -0102					F
Ship Method:	FEDEX GROUND		Saved ORDER:D6891.		•			-		No Holds		
Whse:	WAREHOUSE				-	Ship Com	plete					Т
Currency:	Z-US\$					Carrier Name		-	Est Close	Date?	▼ ×	P
				ОК		Assigned To:		××	Prob of C	losing	××	
Line Items Note	es Addresses Holds User Field	s Audit Related Documents	Purchases Email Audit									
New 🙀 D	elete   🟥 Insert   📑   🗊 🗸	Vailability Item Number IMP-PARM	Item Cla RETAIL	ss Code			Ib	em Shipping Weig 24.	ht UOfM Sch 00 CASE/LB	adule		_
Item	Qty DS NI	Description		Comment UOfM		Cost	Ext Cost	Vendor		Price		
IMP-PARM	1	Imported Parmesan Cheese,	2 per case	CASE		16.00	16.00			95.00		
CW:IMP-P/	ARM 0 🕅 🗹			LB		0.00	0.00			3.99		

CW:IMP-PARM is a non-inventory item, therefore there is no way to track this item. There is also no item card for it, and therefore no way account for this item other than what you set up for that item in GP under Tools > Setup > Posting > Posting Accounts.

User and Company		- Cards -								
User Date		Purchas	ing							
Edit		Trave	actione							
Tools	•	Setup		Setup Checklist						
Maintenance	•	Utilities		System						
SmartList		Routines		Company						
Reminders		Customize		Posting		Posting				
Task List		Integrate	•	Workflow Setup		Posting Account				

You can specify a COGS specific to each catch weight item if you set up the item in the Setting > Catch Weight > Catch Weight Item. Variable costs tracked back to the item through this option still have no inventory tracking.

Catch Weights								
Catch Weight Divisor	1							
Catch Weight Error Hold								
Catch Weight Item								
Catch Weight UOfMs	LB							
Receiving	Receiving							
Catch Weight Separation Character	_							
Sales Entry								
Tracking Catch All Link	http://boxoh	n.com/?t=						

## Step 7 - Sales Fulfillment Plug In

Click **Fulfillment** from either the dropdown action button on the sales order or from the sales document header. The Sales Fulfillment screen allows users to select items from serial/lot numbers and bins to fulfill orders.

After selecting the items, click **OK**.

Search 🗴 🌡	Card: [AARONFIT	0001] Aaro	n Fitz Electrical	×	<b>P</b> F							
Save Save	Print 🛄 🔞 Fu	ulfillment	S Profitabi	lity	2 A							
erties												
D6891				0	ORDE							
AARONFITO	0001			1	Aarc							
Sales Fulfillmen	nt - D6891	1		-		-				-		
Select a line item:			Fulfilment Detail:			Available to Pick (double-click or use button to select):						
These Streets	Descr	Qty	Lot Numbers	Qty	Bin		Lot Number /	Qty Avail	Bin	Date Recei	Lot Expiration	Manufacture
Item Number												
IMP-PARM	Imported Pa	0					-					
IMP-PARM	Imported Pa	0	8002_24.5	1	DOCK		8002_24.5	26	D	4/12/2017		
IMP-PARM	Imported Pa	0	8002_24.5	1	DOCK		8002_24.5 8002_25.0	26 19	D D	4/12/2017 4/12/2017		
IMP-PARM	Imported Pa	0	8002_24.5	1	DOCK	4	8002_24.5 8002_25.0	26 19	D D	4/12/2017 4/12/2017		
INP-PARM	Imported Pa	0	8002_24.5	1	DOCK	*	8002_24.5 8002_25.0	26 19	D	4/12/2017 4/12/2017		
Intern Humber	Imported Pa	0	8002_24.5	1	DOCK	4	8002_24.5 8002_25.0	26 19	D	4/12/2017 4/12/2017		

#### Step 8 - Commit Catch Weights

From the Action dropdown menu, or from your sales document header, choose **Commit Catch Weights**.

We recommend not to commit catch weights until the order is ready to be invoiced, or commit catch weights *after* an order has been invoiced, because once the

Commit Catch Weights application has been applied, order quantities cannot be changed, nor can additional line items that contain catch weights be added. So, if a user wants to make a change to an order that has catch weights, a new order will need to be generated, which is easy to do with the copy function.

es Moni	Configure Actions	L.
unter St	Add Customer Default Items	G
	Smart Printing	
Card:	Tasks	2
Print	Sales Line Excel Import	le
S. 178	Shipping Weight: 24	
	Related Purchases	10
0001	RB Fulfillment Options	
	RB Not loaded	
3	Payments	
OND	Sales Document Manual Split	
SE	Sales Document Split	
	Blanket Order Invoicing	
1	Blanket Order Release	
	Commit Catch Weights	
	Purchase Order Generation	
Local.	Sales Document Recurring Definition	
-	<u></u>	
👜 Co	mmit Catch Weights	
_		
Com	mit Catch Weights	
	int outer rreigno	
Pres	ss OK to commit any Catch W	eights on this document. This process will save
the	sales document (you will not	be able to cancel any of your changes).

Below is an example of how the line items are changed after running the **Commit Catch Weight** plugin on a sales order.

The Commit Catch Weights plugin took the weight of the item and multiplied the weight by the price per pound to get the extended price. So, in the example below, qty 1 case of turkey was equivalent to e24.5 lbs. of turkey selling at \$3.99 per pound.

Item	Qty DS NI Description	Comment UOfM	Cost	Ext Cost Vendor	Price	Ext Price
IMP-PARM	1 📃 📃 Imported Parmesan Cheese, 2 per case	CASE	15.00	16.00	0.00	0.00
CW:IMP-PARM	24.5 🔟 💟	LB	0.00	0.00	3.99	97.76

There is an option to configure sales document header actions so that Commit Catch Weights and Fulfillment are available without clicking the Actions dropdown.

