



U of M Type

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Overview

The Unit of Measure (UofM) feature of SalesPad Cloud allows you to establish different units of measure, as well as categories for units of measure (types), which in turn help you to manage your inventory effectively. UofM allows users to track inventory in multiple units. SalesPad Cloud uses a UofM schedule which allows for a base UofM along with additional UofMs incorporating a base conversion factor. When a new company is created, a default UofM schedule (Each) with a default UofM (Each) is assigned to that company.

Once a UofM schedule is created, multiple UofM Types can be created within the new schedule. Also within the schedule, a base, default sales, and default purchasing UofM can be specified, and these will be used once that UofM schedule is assigned to an item. When creating non-base UofM Types, the conversion factor can be either be a whole number or a decimal, allowing for a UofM that is less than the base UofM. SalesPad recommends setting the lowest tracked UofM as the base, but we understand that this is not always possible. While inventory is always tracked and displayed by the base UofM, purchasing and sales can use a non-base UofM, and the conversion factor will be tracked on the transaction line, allowing the system to add or remove inventory based on the conversion to base.

To get started, select **UofM Type** from the Settings menu.



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UofM Type

Create a UofM type

To create a UofM Type, click the **New UofM Type** button in the upper left-hand corner of the screen.



Name your UofM Type in the UofM Type drawer that appears.



Click **Save** when you are finished.

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Edit a UofM Type

To edit an existing UofM Type, first select the UofM Type from the list on the left-hand side of the UofM Type window.



Once you've selected the UofM Type you want to edit, make your changes in the information fields on the right-hand side of the screen.



For a brief explanation of each of these information fields, click here:

UofM Type

Type Name - Allows you to name the UofM Type

Description - Allows you to further describe the UofM Type

Base Uofm - Determines which UofM is the base UofM for this UofM Type; Conversion Factors will be based on this UofM

Selling Uofm - Determines which UofM is used to sell items of this UofM Type

Purchasing Uofm - Determines which UofM is used to purchase items of this UofM Type

Shipping Uofm - Determines which UofM is used to ship items of this UofM Type

Abbreviation - Allows you to assign an abbreviation for the UofM Type

Inactive - Indicates whether or not the UofM Type is inactive

Note: Before you can assign Base, Selling, Purchasing, or Shipping Uofm's, you will first need to create units of measure (Uofm's) to assign to these fields. Keep reading to learn how to create units of measure for your new unit of measure type.

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Unit of Measure

Create a unit of measure

Note: Before creating a Unit of Measure, make sure that the UofM Type you want to create the Unit of Measure for is highlighted in the UofM Type list.

To create a new Unit of Measure, click the **New Unit of Measure** button in the upper left-

hand corner of the screen.



Name your UofM, give it a conversion factor, and assign it an abbreviation in the Unit of Measure drawer that appears.



Click **Save** when you are finished.

The Conversion Factor field determines how many of the Base UofM (determined in the UofM Type settings) are in the unit of measure you are editing. If our Base UofM is Card, and we create a UofM called Carton with a Conversion Factor of 25, there are 25 cards in a carton.

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Edit a Unit of Measure

To edit a UofM, first select the Unit of Measure from the list on the left-hand side of the UofM Type window. If you don't see the Unit of Measure you want to edit, make sure that the correct UofM Type is selected in the UofM Type list, just to the left of the Unit of Measure list.



Once you've selected the Unit of Measure you want to edit, make your changes in the information fields on the right-hand side of the screen.



Click **Save** when you are finished.

Don't forget to update the Base, Selling, Purchasing, and Shipping Uofm fields of your new UofM Type once you've created the UofMs you need.



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See it in Action

UofM Type dropdowns appear in the Create or Edit Item drawers in the [Inventory](#) module.



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