GP PowerPack

U of M Schedule Change Utility

WilloWare's U of M Schedule Change utility in GP PowerPack automates replacement of an Item's existing U of M Schedule with a new U of M Schedule where the Quantity Decimal Places is the same or larger.

The utility does the following:

- It changes any references to the old U of M Schedule ID to use the new U of M Schedule ID
- It converts all Item Master records (such as Item Purchasing Options and the Price List) to use the new Unit(s) of Measure
- It converts every open transaction to use the new Units of Measure. If necessary, it also converts the transaction quantity into the Base Unit of Measure if a comparable U of M cannot be found on the new U of M Schedule.

The U of M Schedule Change utility converts U of M information in the following Master Records and Transactions:

- All Inventory Setup records (Item Maintenance, Price Lists, Item-Purchasing, etc)
- Inventory Bill of Material & Assembly Transactions
- Kits
- Inventory Transfers & Adjustments
- GP Manufacturing
- Field Service
- Sales Order Processing
- Purchase Order Processing

The new U of M Schedule must have the same Quantity Decimals, or larger. U of M Schedule Change cannot convert to a smaller number of Quantity Decimals.

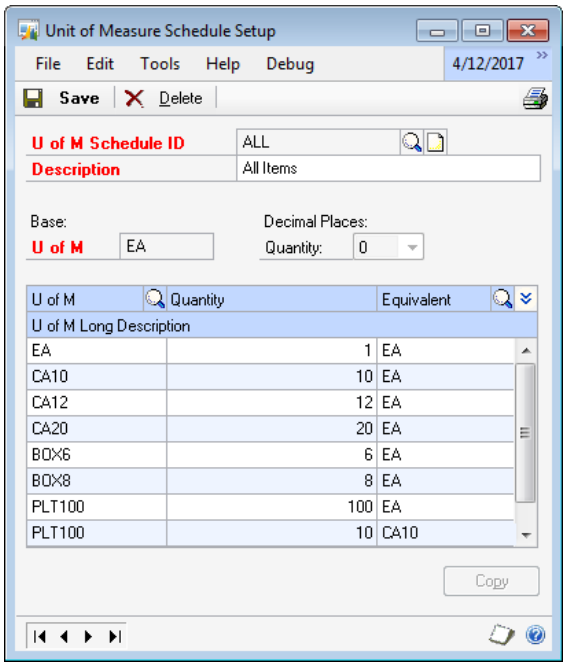
You can manually change the U of M Schedule in GP on the Item Maintenance window, however, GP will delete the Item Price List, Price List Options (the "selling" U of Ms), Item Purchasing Options (the "purchasing" U of Ms), and more. The deleted Master Records then need to be manually re-entered. Additionally, all open transactions for the changed item will not post until manually fixed to use the new U of M. Lastly, Manufacturing and Field Service are not addressed at all, and can continue to be processed with unpredictable results.

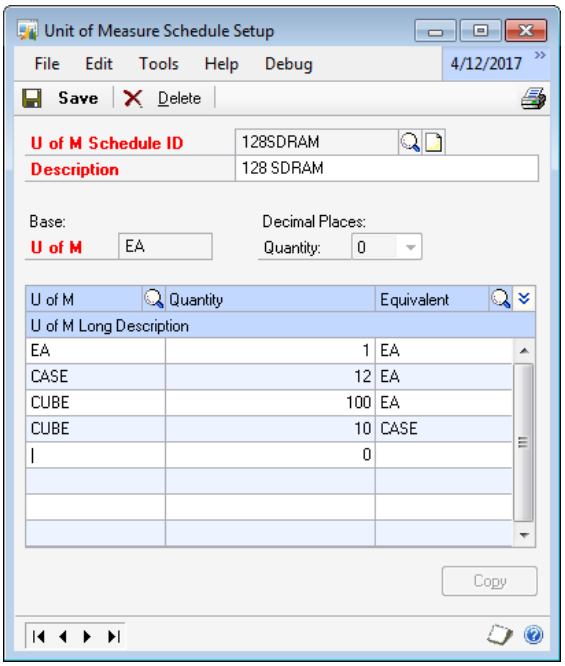
The U of M Schedule Change utility automatically fixes all of these transactions, and converts the Master Records without losing the original setup.

Example Use Scenario

You may have implemented GP with a single U of M Schedule which applied to all items. Over time you have found this causes inventory inaccuracies when users select the incorrect U of M for an item.

Two sample U of M Schedules are shown below. The ALL Schedule is the original. It contains all possible U of M conversions for your items. The new Schedule is on the right. It contains only the U of M conversions which apply to 128SDRAM.





If you create an Inventory Adjustment where you select the CA10 instead of CA12 you remove 10 units from the system instead of 12, and if the actual case of that item actually contains 12, the inventory count in GP then off by 2.

Furthermore, the existing U of M Schedule has imprecise terminology, such as “BOX” and “CASE” on the same Schedule.

To address these issues you want to change to Item-specific U of M Schedules, such as the one shown on the right. The Item-specific U of M Schedule contains only the U of Ms which apply to that item.

Some transactions store quantity information in only the U of M specified (i.e. in the number of cases), while others store the Quantity and U of M entered, but also convert, store, and operate in the Base U of M. The U of M Schedule Change utility knows how every transaction operates, and converts quantities as necessary to be compatible with the new U of M Schedule.

A U of M Conversion may be necessary if a transaction was entered using CA10 for an item that should have used CA12. When that transaction is converted the utility will attempt to find a compatible U of M on the new schedule (i.e. a U of M that converts to 12 of the Base Unit). When it cannot find one (because the transaction should have used CA10), it will convert that transaction line to use the Base Unit. In this case the transaction that had been for 1 of CA12 will be converted to 12 EA.