

Changing Units of Measure on Existing Products

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Q. I have set up a product in my inventory with the wrong unit of measure. How do I change the product so it is setup with the correct units of measure?

A. After an inventory product is established and online balances have been captured, editing any units of measure on inventory products is strongly discouraged. In fact, in many cases, this will put inventory products out of balance.

The most common change customers want to make is to the Inventory Units (found on the *Product Profile* screen). These are the units in which product is received and are the displayed *Quantity* on a customer's invoice. If a product's Inventory Units must be changed, please follow the recommended process described below:

1. Set up a new product in Accounting at *File / Open / Products* with the desired units of measure.
2. Make an Inventory Adjustment to zero out the amount on hand of the old product and move the quantity on hand to the new product converted to the new units of measure at *Inventory / Inventory Adjustment*.

In the following example, Potash's Inventory Units are being changed from *Lbs* to *Tons*.

The screenshot shows the 'Inventory Adjustment' window. At the top, the date is 03/13/2023 and 'Use Lot Quantities' is unchecked. The 'Adjustment Type' is set to 'Physical Count'. The 'Reference #' is 120009. The 'Calculation Type' has 'Physical Count' selected. A red warning message states: 'WARNING!! Adjusting to Physical (rather than Difference) when others are posting transactions to any of the listed items may have undesired results.' Below this is a table with the following data:

	<Product Name>	Balance	Physical	Difference	Units	% Change
1	Potash (0-0-60)	22870.000	0.000	-22870.000	Lbs	-100.0
2	Potash Tons	0.000	11.435	11.435	Tons	N/A

At the bottom, there are buttons for 'Print on Save', 'Remove Zero Difference', 'Set Physical to Balance', 'Calculate Difference', 'Save', and 'Cancel'.

3. After making the Inventory Adjustment, the old product can be edited to mark as *Inactive*. Once a fiscal year is ended, the product can be deleted.