

Purchase Units vs. Allocation Units

Aspire allows you to estimate materials in one unit of measure and purchase them in another unit. For example, I might estimate roundup for jobs in ounces, but order from the vendor in one or two gallon containers. In this case, "ounces" represents the allocation units and "one gallon" or "two gallons" represent possible options for purchase units.

Allocation units are used throughout Aspire, including estimates, work ticket allocations and inventory. Allocation units are converted and represented as purchase units on purchase receipts when ordering material. When adding items to the item catalog, you should always provide a reasonable purchase unit cost – this value should not be left as \$0.

Setting Units for Catalog Items

When you add an item to the item catalog, you can specify both its allocation and purchase units as well as the conversion factor that allows Aspire to convert allocation units to purchase units on purchase receipts. Once an item has been saved to the catalog, you cannot change the purchase units or the allocation units.

- In the Admin screen, go click the Manage Items icon.
- Hover over the *New* ⁽¹⁾ icon and choose the type of item you wish to create.
- Choose your purchase units (by default purchase and allocation units are the same)
- Change your allocation units if necessary and specify a conversion factor. For example, 1 gallon is equal to 128 ounces so, in this case, the conversion factor is 128.
- Add purchase unit cost. Aspire will calculate the allocation unit cost when you click the *Save* icon.

	tom 1 **Now**			
	item "New"			
Item Name	Splitz Weed Killer	Active	8	
Alternate Name	Splitz	Available to Bid	8	
Category	Fert Chems ~	Inventory Item		
Purchase/Allocation Units	1 gai ~ = (128.00) Oz ~	Force Single Unit Pricing		
Item Code		Takeoff Item	Select One Y	
EPA Number		Allocation Item Cost	\$0.000	j
EPA Name		Purchase Unit Cost	\$8.000	
(10	



Units on Purchase Receipts

When adding items to a purchase receipt, the quantities(a) will be displayed in purchase units. When you drill in to add or view allocations to specific work tickets (or to inventory), those allocations(b) are represented in allocation units. The conversion from allocation units to purchase units is summarized at the bottom of the Purchase Allocations screen(c).

Saint Peters	~ I	Received			Receipt Status	New		(
St. Peters Warehouse, 2343 Sa	alt Lick Road	Invoice Date		Sync Status n/a						
Jollie's Landscape Supply and N	Nursery v	Invoice #			Ticket			6		
em	Item Type		a	Quantity	Est. Unit Price		Ext. Price			
Roundup (2 Gal)	Material		1.00		\$50.000		\$50.000	8		
Property/Service - Ticket or Inventory Location	b	antity			Sub Total Extra Costs	Select One Y	\$50.000			
	b	•			Sub Total		\$50.000			
Property/Service - Ticket or Inventory Location Didion CastingWeekly Site Service - #9872		antity 12.80 🐼 🍅			Sub Total Extra Costs Total	Select One Y	\$50.000			
Property/Service - Ticket or Inventory Location Didion Casting/Weekly Site Service - #9872 Didion Casting/Weekly Site Service - #9873	b	antity 12.80 😵 着 12.80			Sub Total Extra Costs Total	Select One V	\$50.000			
Property/Service - Ticket or Inventory Location Didion Casting/Weekly Site Service - #9872 Didion Casting/Weekly Site Service - #9873 Didion Casting/Weekly Site Service - #9875	b	antity 12.80 ⊗ 12.80 ⊗ 12.80 ⊗ 12.80 ⊗ 12.80 ⊗ 12.80 ⊗			Sub Total Extra Costs Total	Select One Y	\$50.000			
Property/Service - Ticket or Inventory Location Didon Casting/Weekly Site Service - #9872 Didon Casting/Weekly Site Service - #9873 Didon Casting/Weekly Site Service - #9875	Purchase Total	 antity 12.80 22.80 32.80 32.80 32.80 33.40 34.40 34.40			Sub Total Extra Costs (Total	Select One V	\$50.000	÷		
Property/Service - Ticket or Inventory Location Didion Casting/Weekly Site Service - #9872 Didion Casting/Weekly Site Service - #9873 Didion Casting/Weekly Site Service - #9874 Didion Casting/Weekly Site Service - #9875	Purchase Total Conversion Factor	antity 12.80 ⊗ û 12.80 ⊗ 12.80 ⊗ 12.80 ⊗ 12.80 ⊗ 12.80 ⊗	с		Sub Total Extra Costs Total	Select One v	\$50.000 \$50.000	Č		

Units on Work Ticket

When you drill into the item costs^a from the *Work Ticket* screen to view the *Work Ticket Costs* screen^b, item quantities are displayed in allocation units.

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Property	Didion Castin	<u>19</u>	Visits		0 Futur	e Sch	e								
lob	#1078 - Weed	Suppression	Invoice		Fixed Pa	yme	nt								_
Status	Scheduled		Issues		0 Open	/ <u>0</u> ·	т								c
Crew Leader	Select One	~	Scheduled [Date	01/01/17	7	b								Ч
Ticket Notes S	Service Notes						∖								
							Work Ticket Costs								Π
						Expa	and All Collapse All								6
	Hours	Costs	a	•			Item	Show	Est Q	ty Com Qty	Inventory	Act Qty	Remaining	Estő	Act
Budgeted	2.00	Туре	Est.	Act.	Budgete	4	Roundup (2 Gal) - Oz	۲		5 12.8	0	5	0	\$0.98	\$1.0
Vorked	0.00	Material	\$0.98	\$1.04	┝		Allocation	Date		Com Qty	Inventory	Act Qty		Acts	
cheduled	0.00	Equip	\$0.00	\$0.00	J		Receipt #ma 1059	04/11/201	7	12.8	0	0		\$0.00	
							Receipt #ma 1048	01/16/201	7	0	0	5		\$0.98	
							Receipt #ma 1048 (Adjustment)	02/06/201	7	0	0	0		S0.07	
														\$0.98	\$1.0
						4									

Swork Ticket | #9873 - Weekly Site Service (2 of 52)