

## Purchase Units vs. Allocation Units

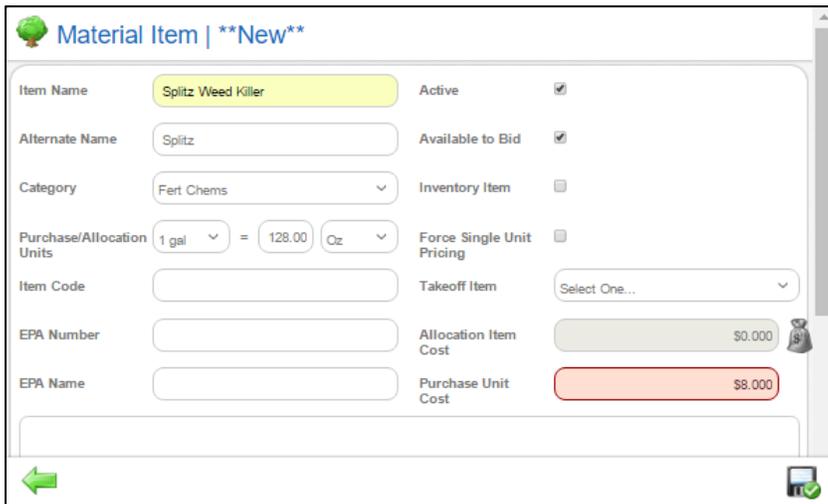
Aspire allows you to estimate materials in one unit of measure and purchase them in another unit. For example, I might estimate roundup for jobs in ounces, but order from the vendor in one or two gallon containers. In this case, “ounces” represents the allocation units and “one gallon” or “two gallons”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



## 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).

**Purchase Receipt | #ma 1059**

| Item            | Item Type | Quantity | Est. Unit Price | Ext. Price |
|-----------------|-----------|----------|-----------------|------------|
| Roundup (2 Gal) | Material  | 1.00     | \$50.000        | \$50.000   |

**Purchase Allocations for Roundup (2 Gal)**

| Property/Service - Ticket or Inventory Location | Quantity |
|-------------------------------------------------|----------|
| Didion Casting/Weekly Site Service - #9872      | 12.80    |
| Didion Casting/Weekly Site Service - #9873      | 12.80    |
| Didion Casting/Weekly Site Service - #9874      | 12.80    |
| Didion Casting/Weekly Site Service - #9875      | 12.80    |

Summary:

- Purchase Total: 1.00 (2 gal)
- Conversion Factor: x256.00
- Allocation Total: 256.00 (Oz)

## Units on Work Ticket

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

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

Property: **Didion Casting** | Visits: 0 Future Schedules  
 Job: **#1078 - Weed Suppression** | Invoice: Fixed Payment  
 Status: Scheduled | Issues: 0 Open / 0 Tracked  
 Crew Leader: Select One... | Scheduled Date: 01/01/17

| Hours           | Costs          | Est.   | Act.   | Budget |
|-----------------|----------------|--------|--------|--------|
| Budgeted: 2.00  | Type: Material | \$0.98 | \$1.04 |        |
| Worked: 0.00    | Type: Equip    | \$0.00 | \$0.00 |        |
| Scheduled: 0.00 |                |        |        |        |

**Work Ticket Costs**

| Item                          | Show       | Est Qty | Com Qty   | Inventory | Act Qty | Remaining | Est \$ | Act \$ |
|-------------------------------|------------|---------|-----------|-----------|---------|-----------|--------|--------|
| Roundup (2 Gal) - Oz          |            | 5       | 12.8      | 0         | 5       | 0         | \$0.98 | \$1.04 |
| Allocation                    | Date       | Com Qty | Inventory | Act Qty   | Act \$  |           |        |        |
| Receipt #ma 1059              | 04/11/2017 | 12.8    | 0         | 0         | \$0.00  |           |        |        |
| Receipt #ma 1048              | 01/16/2017 | 0       | 0         | 5         | \$0.98  |           |        |        |
| Receipt #ma 1048 (Adjustment) | 02/06/2017 | 0       | 0         | 0         | \$0.07  |           |        |        |
|                               |            |         |           |           | \$0.98  |           | \$1.04 |        |