WAREHOUSE
CREATE INVENTORY ITEM

Provides guidance for how to create an inventory item
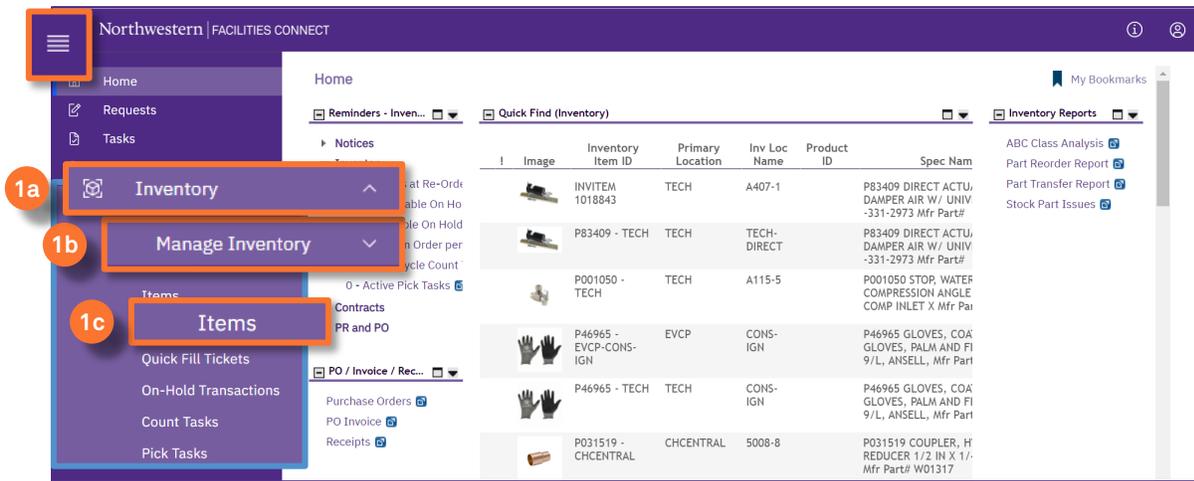
DIRECTIONS:

1 From the **Facilities Connect Home Screen**, navigate to the hamburger menu:

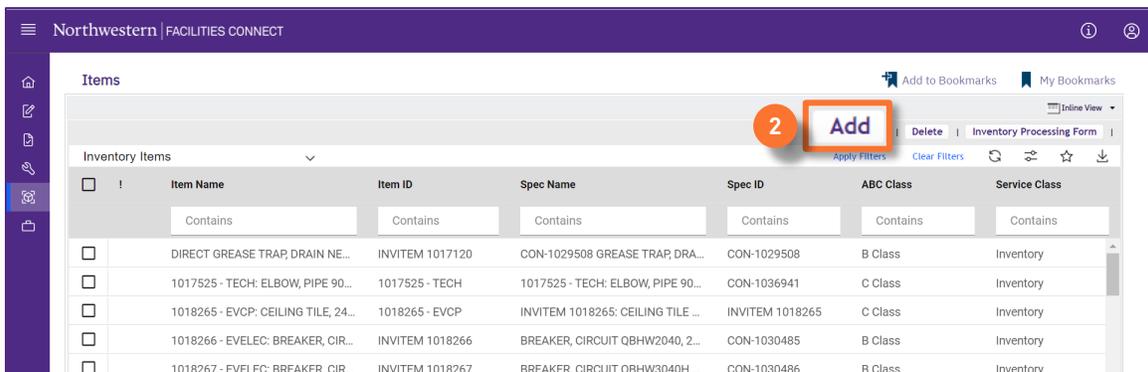**1a** Click on the **Inventory** section drop down menu.

1b Click on the **Manage Inventory** section drop down menu.

1c Click on **Items.**

2 Upon clicking, the Item screen will open:
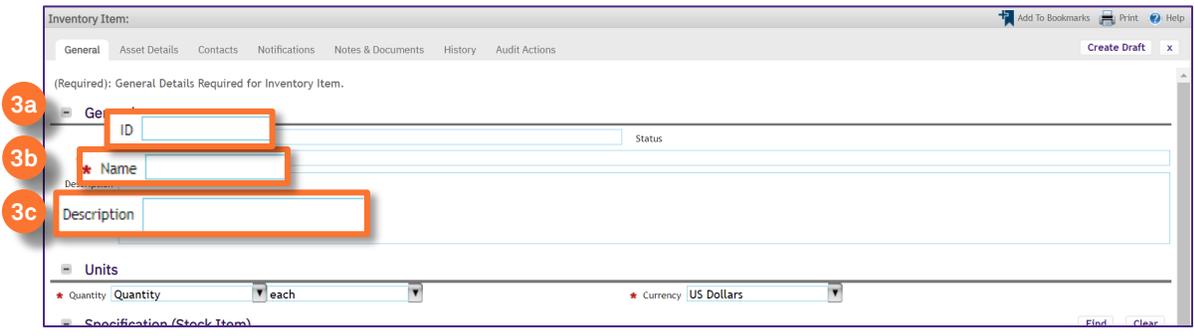
2 Click on **Add**

WAREHOUSE
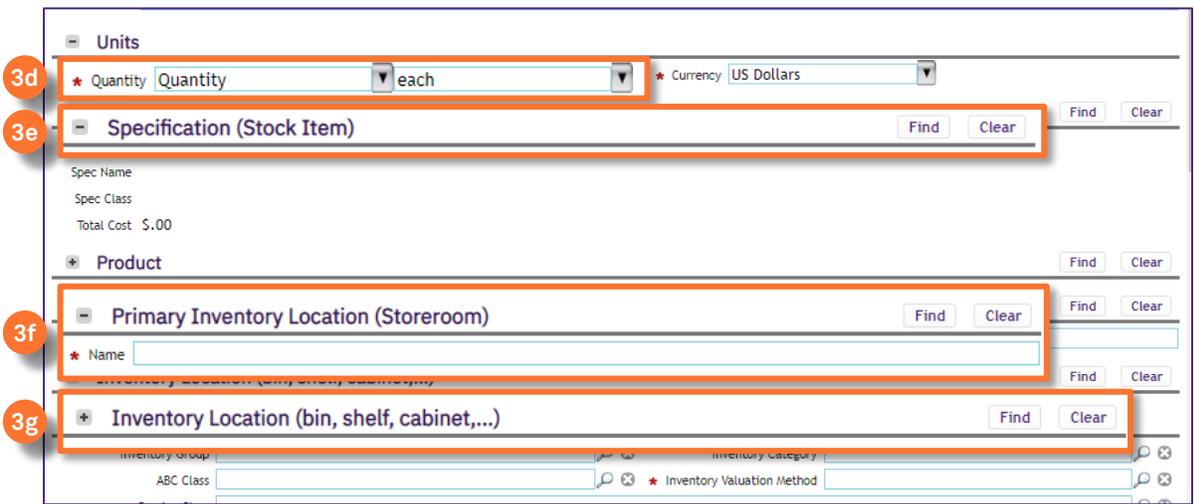# CREATE INVENTORY ITEM

DIRECTIONS:

3 Complete all required (marked with *****) and applicable fields on the **General** tab.

Scroll the screen down to see all the required fields.

3a **ID**: auto-generated when entry is "Activated".

3b **Name**: Fit, Form, Function/Category 3, Category 2, and Size Specifications.

3c **Description**: Same as Name + any information relevant for the part (e.g., Vendor, part #, Manufacturer # etc.).

3d **Quantity**: use drop down menu.

3e **Specification** (Stock Item) : Click on Find button.

3f **Primary Inventory Location** (Storeroom): Click on Find

3g **Inventory Location** (bin, shelf, cabinet,...): Click on Find

WAREHOUSE
CREATE INVENTORY ITEM

DIRECTIONS:

3 *Continued*. Complete all required (marked with *****) and applicable fields on the **General** tab.

Scroll the screen down to see all the required fields.

3h **ABC Class:** Enter if available

3i **Service Class:** pulled from Spec ID

3j **Inventory Valuation Method:**
- **Average** = does not require UOM conversion
- **LIFO** = requires UOM conversion

3k **Inventory Type:**
- **Asset** (**Assignable**) – Direct parts
- **Asset** (**Reservable**) – Stock parts
- **Consumable** - Benchstock
- **Vendor Managed** – Vending machine

3l **Contains Hazardous Material** –

3m **Storeroom Type:**
- Self-Managed - Warehouse
- Managed Vendor

3n **Critical:** Check box if applicable

3o **Seasonal:** Check box if applicable.
- Select applicable months.

3p **Unit of Measure Quantity**

3q **Lead Time:** Use calendar button if applicable.

3r **Unit of Purchase Quantity**

3s **Purchasing Reorder Logic:** Defaults to ROP

3t **Purchasing Reorder Point (ROP)**

3u **Stock Category:**
- Stocked = Stock
- Non-Stocked = Direct Part

WAREHOUSE
CREATE INVENTORY ITEM

DIRECTIONS:

4 **Optional**: Click on any of the other tabs (Asset Details, Contacts, Notifications, Notes & Documents) and enter desired information.

When you have completed all required and optional fields:

4 Click on **Create Draft.**

5 Click on **Activate** to complete.