



WAREHOUSE

CREATE INVENTORY ITEM

Provides guidance for how to create an inventory item

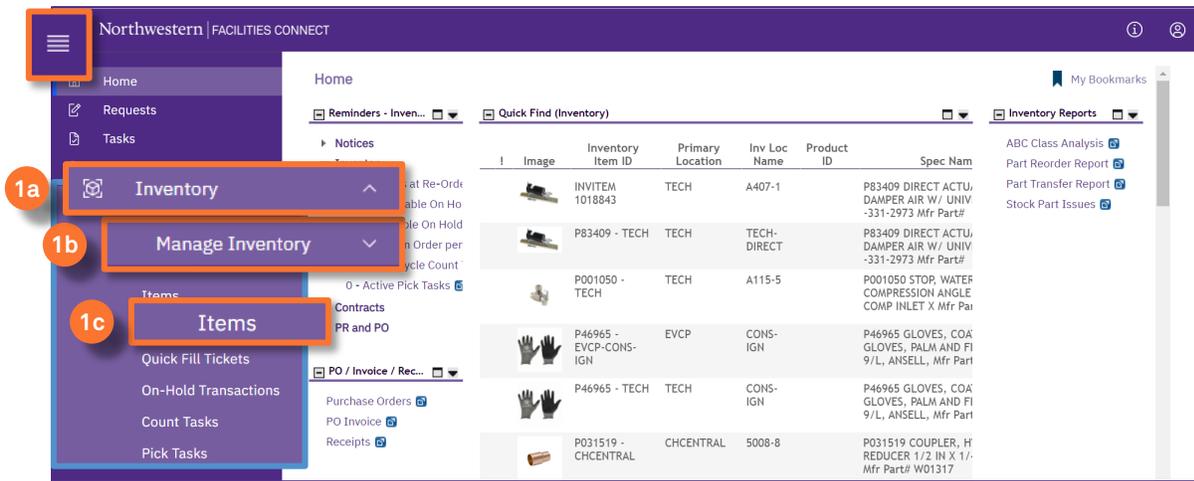
DIRECTIONS:

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

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

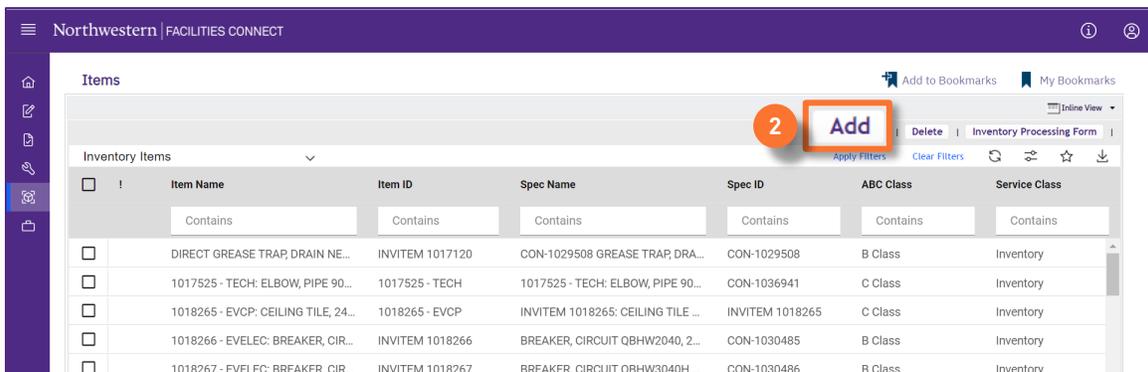
1b Click on the **Manage Inventory** section drop down menu.

1c Click on **Items**.



2 Upon clicking, the Item screen will open:

2 Click on **Add**





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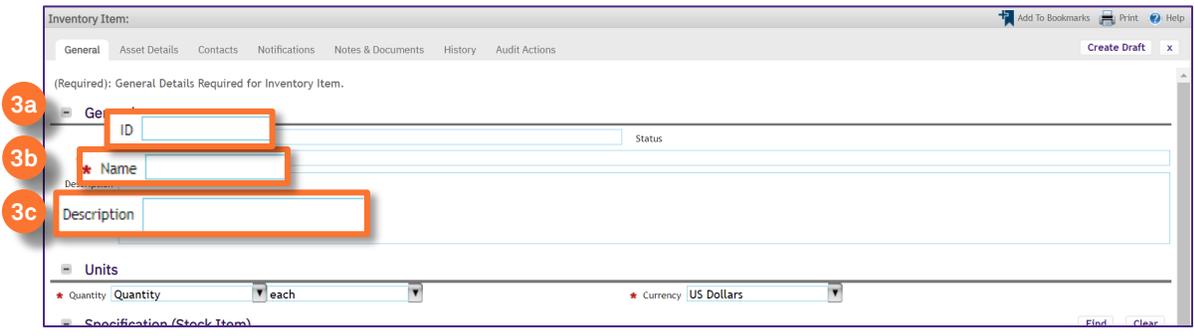
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DIRECTIONS:

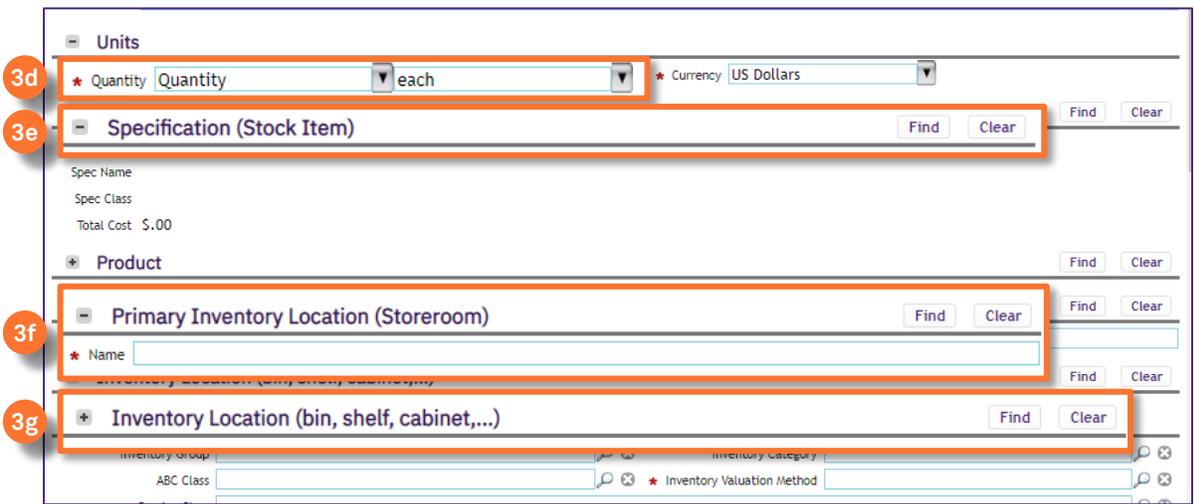
3 Complete all required (marked with *****) and applicable fields on the **General** tab.

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



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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
- 3k** **Inventory Type:**

 - **Asset (Assignable)** – Direct parts
 - **Asset (Reservable)** – Stock parts
 - **Consumable** - Benchstock
 - **Vendor Managed** – Vending machine
- 3l** **Contains Hazardous Material** –
- 3i** **Service Class:** pulled from Spec ID
- 3m** **Storeroom Type:**

 - Self-Managed - Warehouse
 - Managed Vendor
- 3j** **Inventory Valuation Method:**

 - **Average** = does not require UOM conversion
 - **LIFO** = requires UOM conversion

- 3n** **Critical:** Check box if applicable
- 3p** **Unit of Measure Quantity**
- 3r** **Unit of Purchase Quantity**
- 3o** **Seasonal:** Check box if applicable.
• Select applicable months.
- 3q** **Lead Time:** Use calendar button if applicable.

- 3s** **Purchasing Reorder Logic:**
Defaults to ROP
- 3t** **Purchasing Reorder Point (ROP)**
- 3u** **Stock Category:**

 - Stocked = Stock
 - Non-Stocked = Direct Part



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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**.

The screenshot shows the 'Inventory Item' form with the following sections:

- General:** ID, Name (required), Description, Status.
- Units:** Quantity (dropdown), Unit (dropdown, set to 'each'), Currency (dropdown, set to 'US Dollars').
- Specification (Stock Item):** ID (required), Image, Spec Name, Spec Class, Total Cost (\$0.00). Buttons: Find, Clear.

The 'Create Draft' button is highlighted with a red box, and a red circle with the number '4' is placed over it.

5

Click on **Activate** to complete.

The screenshot shows the 'Inventory Item' form with the following sections:

- General:** ID, Name (required), Description, Status.
- Units:** Quantity (dropdown), Unit (dropdown, set to 'each'), Currency (dropdown, set to 'US Dollars').
- Specification (Stock Item):** ID (required), Image, Spec Name, Spec Class, Total Cost (\$0.00). Buttons: Find, Clear.
- Product:** Buttons: Find, Clear.
- Primary Inventory Location (Storeroom):** Name (required). Buttons: Find, Clear.
- Inventory Location (bin, shelf, cabinet,...):** Buttons: Find, Clear.

The 'Activate' button is highlighted with a red box, and a red circle with the number '5' is placed over it.