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.

Upon clicking, the Item screen will open:

2. Click on Add
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DIRECTIONS:

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

2. 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
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
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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**.

5. Click on **Activate** to complete.