



WAREHOUSE

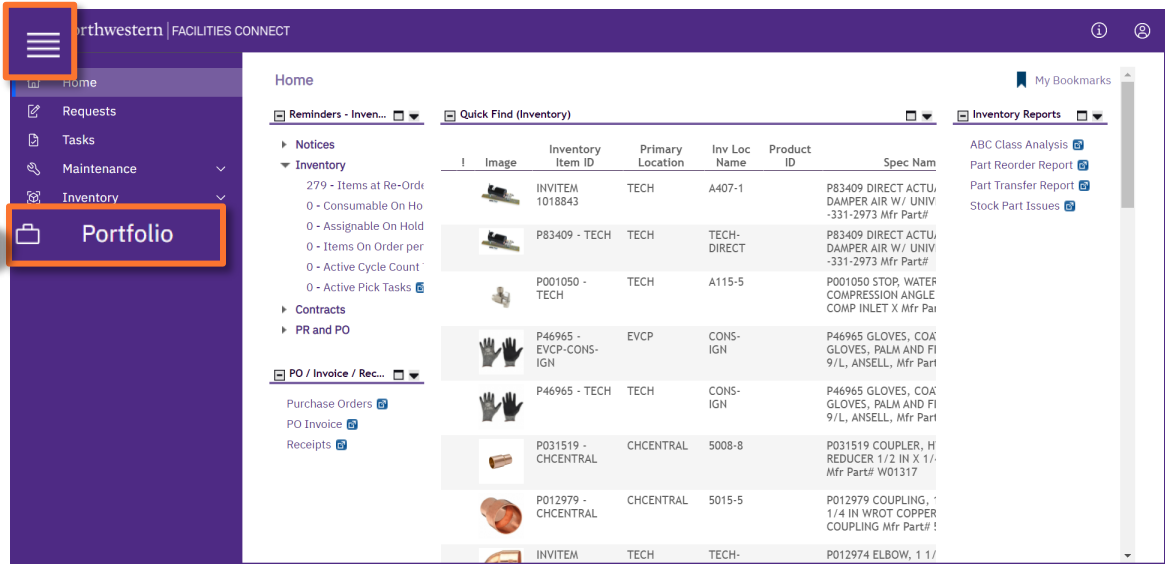
CREATE CONSUMABLE SPEC

Provides guidance for how to create a consumable specification.

DIRECTIONS:

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

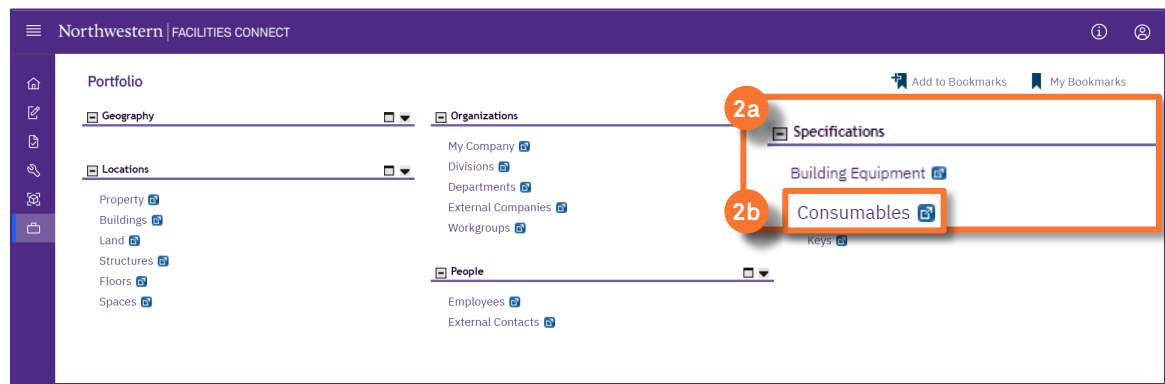
1 Click on the **Portfolio** section.



2 Upon clicking, the Portfolio screen will open:

2a Locate the **Specifications** section.

2b Click on **Consumables**.



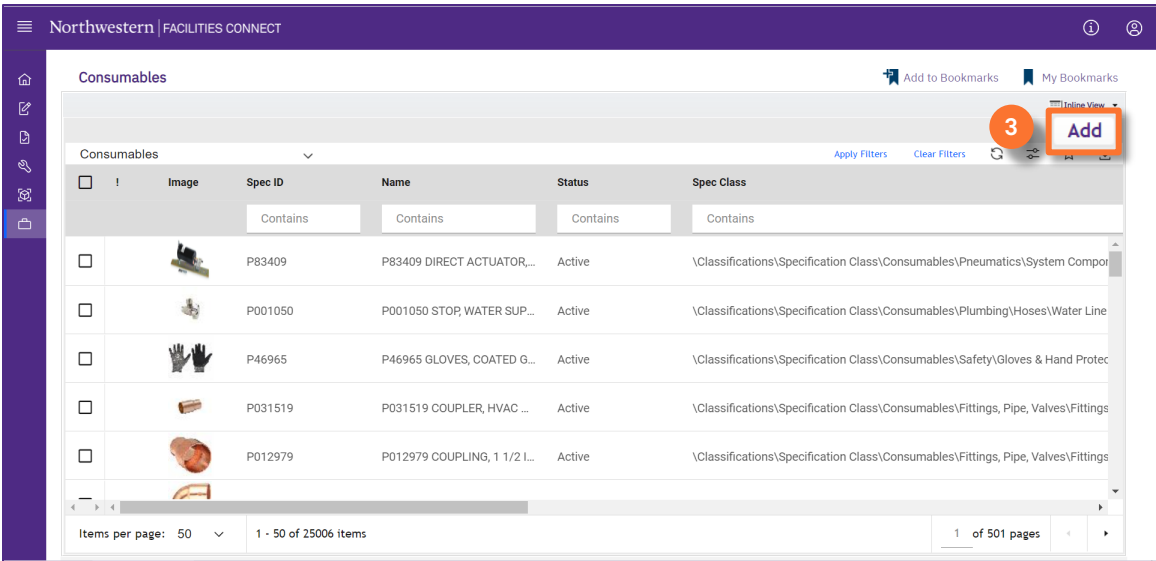


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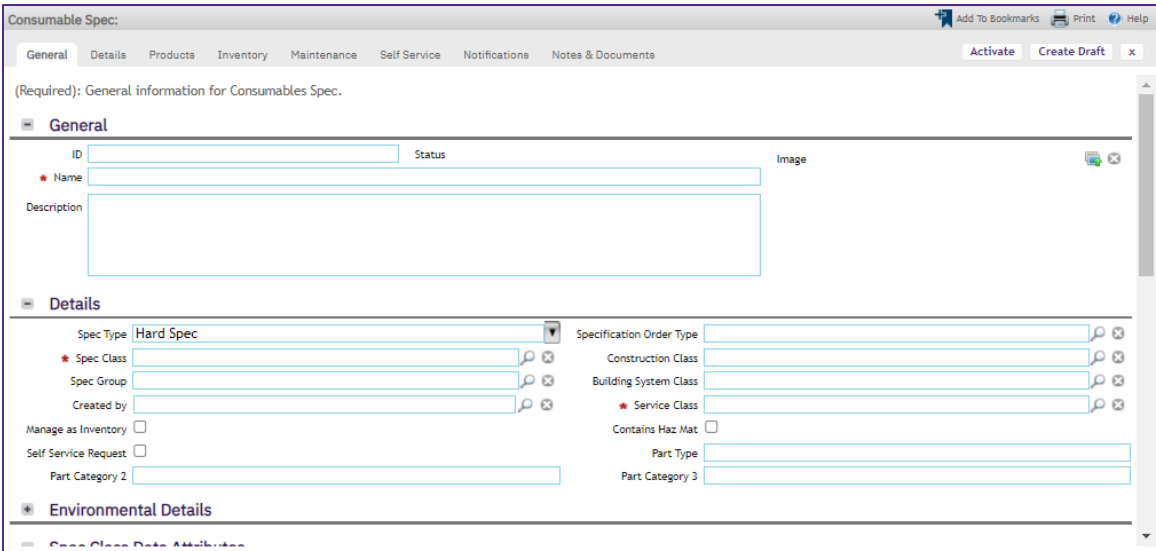
CREATE CONSUMABLE SPEC

DIRECTIONS:

- 3
- Upon clicking, the **Consumables** screen will open:
- 3
- Click on the **Add** button.



- 4
- Upon clicking, a new **Consumables Spec record** opens in a new window.





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DIRECTIONS:

4

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

Scroll the screen down to see all the required fields.

The screenshot shows the 'Consumable Spec' form with the 'General' tab selected. The form contains various fields for creating a consumable specification. Callouts 4a through 4k point to specific fields and sections:

- 4a: ID field
- 4b: Name field (marked with a red star)
- 4c: Description field
- 4d: Spec Type dropdown (set to 'Hard Spec')
- 4e: Spec Class dropdown (marked with a red star)
- 4f: Manage as Inventory checkbox
- 4g: Service Class dropdown (set to 'Inventory', marked with a red star)
- 4h: Contains Haz Mat checkbox
- 4i: Part Category 2 and Part Category 3 dropdowns
- 4j: Units, Manufacturer, and Manufacturer Details sections
- 4k: Item Cost section

4a **ID:** auto generate when entry is “Activated”.

4b **Name:** ID (add after activation), Fit, Form, Function/Category 3, Category 2, and Size Specifications.

4c **Description:** Same as Name + any information relevant for the part (e.g., Vendor, part #, Manufacturer # etc.).

4d **Spec Type:** Leave as “Hard Spec”.

4e **Spec Class:** Choose applicable class.

4f **Manage as Inventory:** Click box if Stock part.

4g **Service Class:** Select **Inventory**.

4h **Contains Haz Mat:** Check box if applicable.

4i **Part Category 2/Part Category 3:** Auto-generates based on Spec Class selection.

4j **Units, Manufacturer, Manufacturer Detail:** Enter Brand, Model Number Model Name if information is available

4k **Item Cost:** Update if info is available at time of entry. Leave **Valuation Method** blank.



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DIRECTIONS:

- 5 Click on the **Details** tab.
- 5 Fill in any required fields.

- 6 Click on the **Inventory** tab.
- 6a Complete all required (marked with *****) and applicable fields.

- 6b **ABC Class**: Enter if information is available.
- 6c **Service Class**: Information will default based on input from General tab.
- 6d **Item Units**: Information will default based on input from General tab.
- 6e **Purchasing Reorder Logic**: Defaults to ROP.
- 6f **Purchasing Reorder Point**: Required.



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DIRECTIONS:

- 7
- Optional:** Click on any of the other tabs (Products, Maintenance, Self Service, Notifications, Notes & Documents) and enter desired information.

When you have completed all required and optional fields:

- 7
- Click on **Create Draft**.

Consumable Spec: Add To Bookmarks Print Help

General Details Products **Inventory** Maintenance Self Service Notifications Notes & Documents

(Required): Inventory Manager defaults for Consumables Spec.

Inventory General

Inventory Group Inventory Category
ABC Class Inventory Valuation Method
★ Service Class

Inventory Details

Create Asset on Receipt ☐ Inventory Type
Manage Safety Stock ☐ Safety Stock Quantity 0

Units

★ Item Units Quantity each ★ Currency US Dollars

7 **Create Draft**

- 8
- Click on **Activate** to complete.

Consumable Spec: Add To Bookmarks Print Help

General Details Products Inventory Maintenance Self Service Notifications Notes & Documents

(Required): General information for Consumables Spec.

General

ID Status Image

★ Name

Description

Details

Spec Type **Hard Spec** Specification Order Type
★ Spec Class Construction Class
Spec Group Building System Class
Created by ★ Service Class
Manage as Inventory ☐ Contains Haz Mat ☐
Self Service Request ☐ Part Type
Part Category 2 Part Category 3

Environmental Details

Energy Rating Type Energy Rating Value 0
Overall Product Rating

Spec Class Data Attributes

Units

★ Currency US Dollars ★ Item Units Quantity each

8 **Activate**