

# EQUIPMENT

## ASSETS - ADD - USER DEFINED

A **User Defined** panel has been added to the Asset Maintain screen - the Equipment Maintenance for Serial No: [] screen.

User defined fields in Nucleus Service enables the user to provide more information within a module so that work or associated processes can be carried out more efficiently.

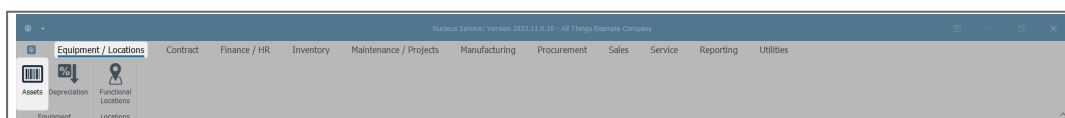
These added fields cut down the transition between screens or reduces the amount of screens open in order to find information. In essence these fields serve as a shortcut so that users do not have to leave the listing or maintain fields affected.

At present, these fields in the **Equipment - Assets** module can be used to add extra information relevant to the selected asset. The added fields will reflect in the User Defined panel in the Asset Maintain screen across all assets on the system, but the **Variable Values** selected for each User Defined field will be unique to the selected asset.

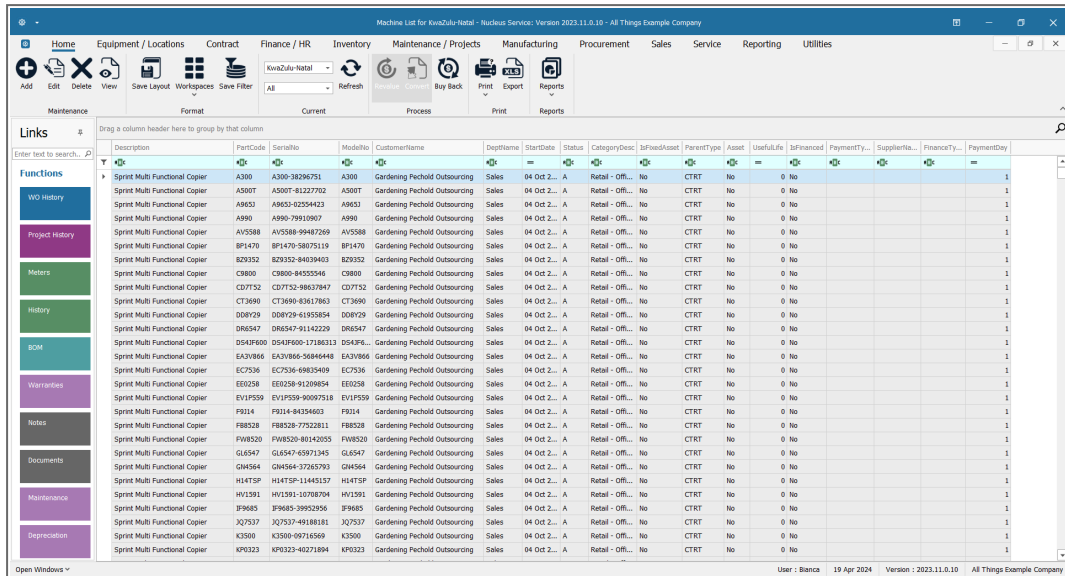
This information will also reflect in the **Call Maintain** screen where the asset is linked. Although the fields can be viewed from the Call Maintain screen, the actual information can only be edited in the Asset Maintain screen.

## ASSET LISTING SCREEN

Ribbon Select **Equipment and Locations > Assets**



- The **Machine Listing** screen will be displayed.



Description	PartCode	SerialNo	ModelNo	CustomerName	DeptName	StartDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinancial	PaymentTy...	SupplierNo...	FinanceTy...	PaymentDay
Sprint Multi Functional Copier	A300	A300-38296751	A300	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A500T	A500T-81227702	A500T	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A950	A950-42559423	A950	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A990	A990-79910907	A990	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	AV5588	AV5588-99487269	AV5588	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	BP1470	BP1470-58075119	BP1470	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	B29352	B29352-84039403	B29352	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	C9800	C9800-84555546	C9800	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CD7732	CD7732-88637847	CD7732	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CT3690	CT3690-83617863	CT3690	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D08729	D08729-61955854	D08729	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D86547	D86547-91142229	D86547	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D543F600	D543F600-17186313	D543F6...	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EA3V866	EA3V866-56846448	EA3V866	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EC7536	EC7536-69835409	EC7536	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EE0258	EE0258-91209854	EE0258	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EY1P559	EY1P559-460697518	EY1P559	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F8154	F8154-84356602	F8154	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F88328	F88328-77522811	F88328	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	FW8520	FW8520-80142055	FW8520	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GL6547	GL6547-65971345	GL6547	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GH4564	GH4564-37265793	GH4564	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	H1475P	H1475P-11445157	H1475P	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	HV1291	HV1291-10708704	HV1291	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JF9485	JF9485-30952956	JF9485	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JQ7537	JQ7537-44188181	JQ7537	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	K3500	K3500-09716569	K3500	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	KP0323	KP0323-40271894	KP0323	Gardening Pechold Outsourcing	Sales	04 Oct 2...	A	Retail - Off...	No	CTRT	No	0	No				1

## Select the Site

Your employee user record should be linked to a default site. In this case, the site will auto populate with this default, otherwise the site must be manually selected.

Another site can be selected, if required, and if you have the security rights to access the site.

If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

## ASSET DETAILS

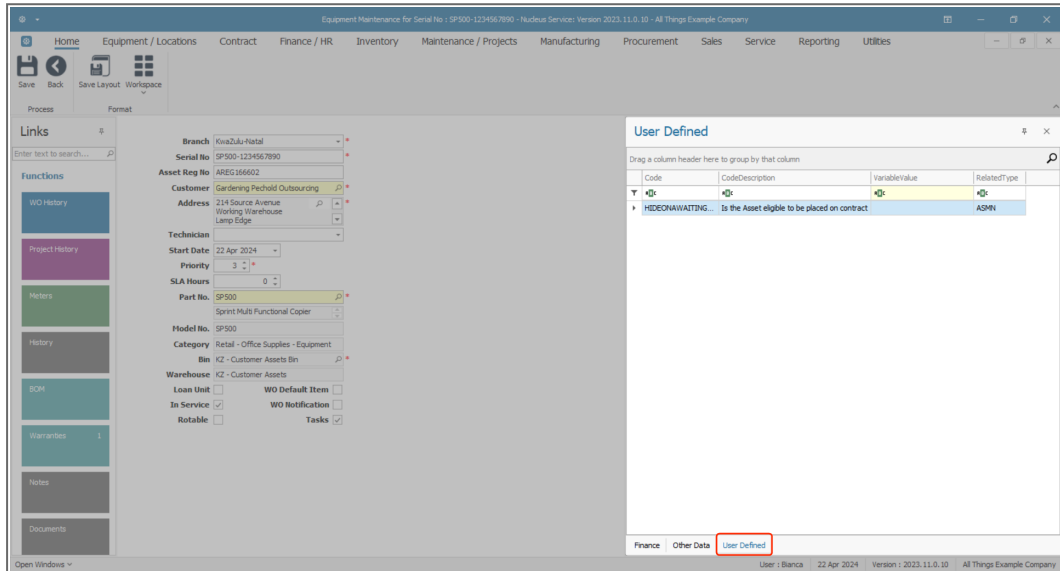
Follow the processes to:

- [add the customer asset details](#) and
- [add the customer asset finance details.](#)

(Only a **customer asset**<sup>1</sup> should be added from this screen.)

## THE USER DEFINED PANEL

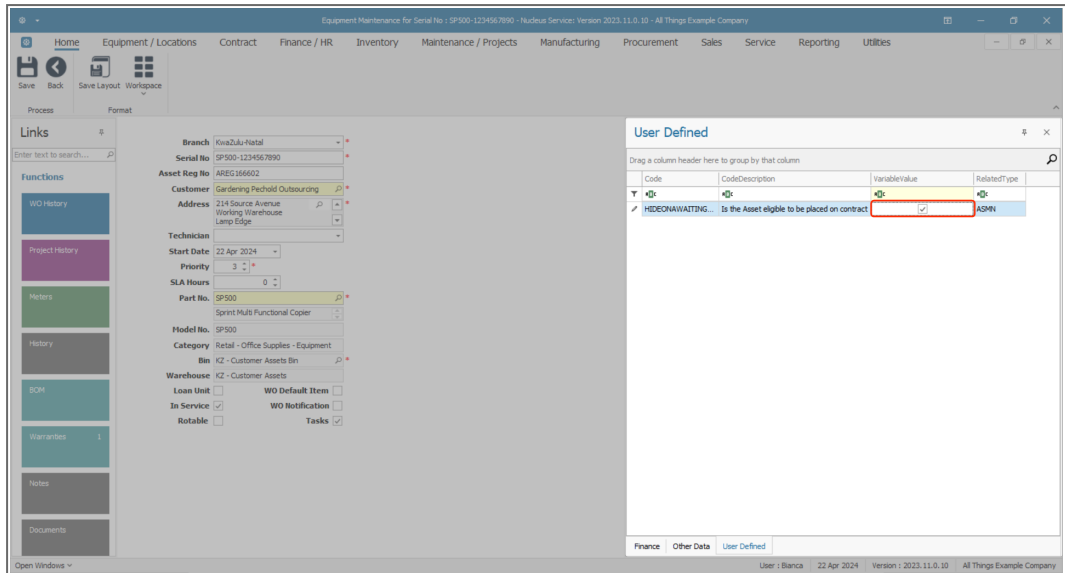
- Once the customer asset details and finance details have been added,
- Click on the **User Defined** tab.



The screenshot shows the 'Equipment Maintenance' window for a specific asset. The 'User Defined' panel is open, displaying a table with columns: Code, CodeDescription, VariableValue, and RelatedType. A single entry is visible with the Code 'HIDEONAWAITING...', CodeDescription 'Is the Asset eligible to be placed on contract', VariableValue 'ASMR', and RelatedType 'ASMR'. The 'User Defined' tab is highlighted in the bottom navigation bar.

- The **User Defined** panel will open.
- In this example, there is a pre-existing **Code**. This means that a User Defined custom element has already been added to this or another asset in the system.
- The **Code** and **Code Description** are not specific to an individual asset. When a Code and Description are entered and saved here, they are subsequently available in every asset User Defined panel.
- The **Variable Value** is unique. These are set up per specific asset.

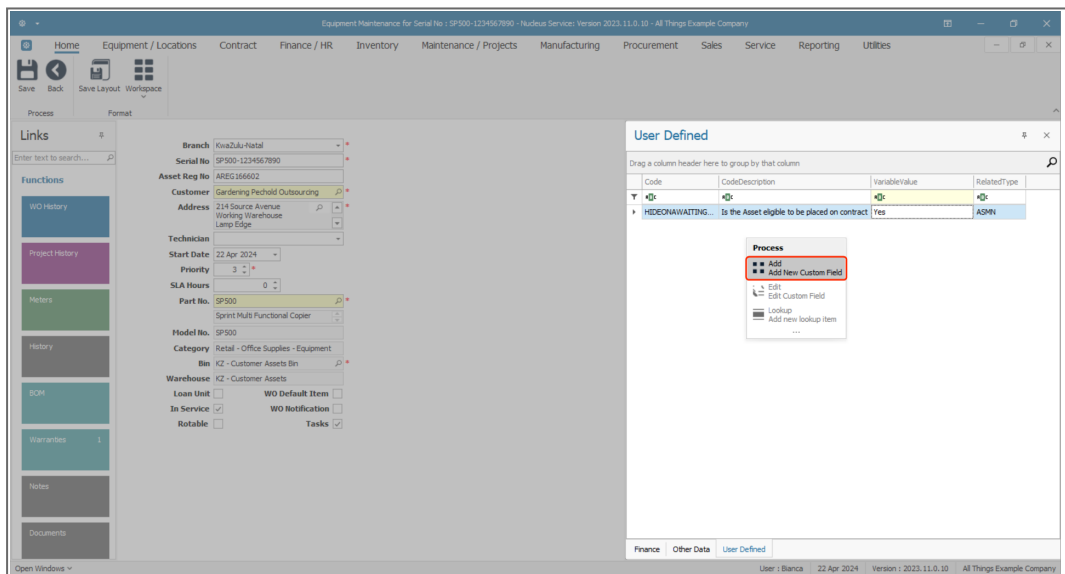
<sup>1</sup>A customer asset is where a customer brings in a machine for service or repair that was bought elsewhere. A customer asset can also be a stock item that has been sold (and invoiced) to a customer. Customer assets can generate an income for your organisation via service or maintenance contracts.



Code	CodeDescription	VariableValue	RelatedType
HIDEONWAITING...	Is the Asset eligible to be placed on contract	Yes	ASMN

## ADD NEW CUSTOM USER DEFINED FIELD

- **Right-click** anywhere in a row of the data grid.
- A **Process** menu will pop up.
- Click on **Add** - Add New Custom Field.



- The **Add new custom element** screen will open.

All of the fields in this screen are mandatory [\*].



**Note:** These fields can be populated according to **individual** company requirements. The example given here is pertinent to the system being demonstrated and is not universal.

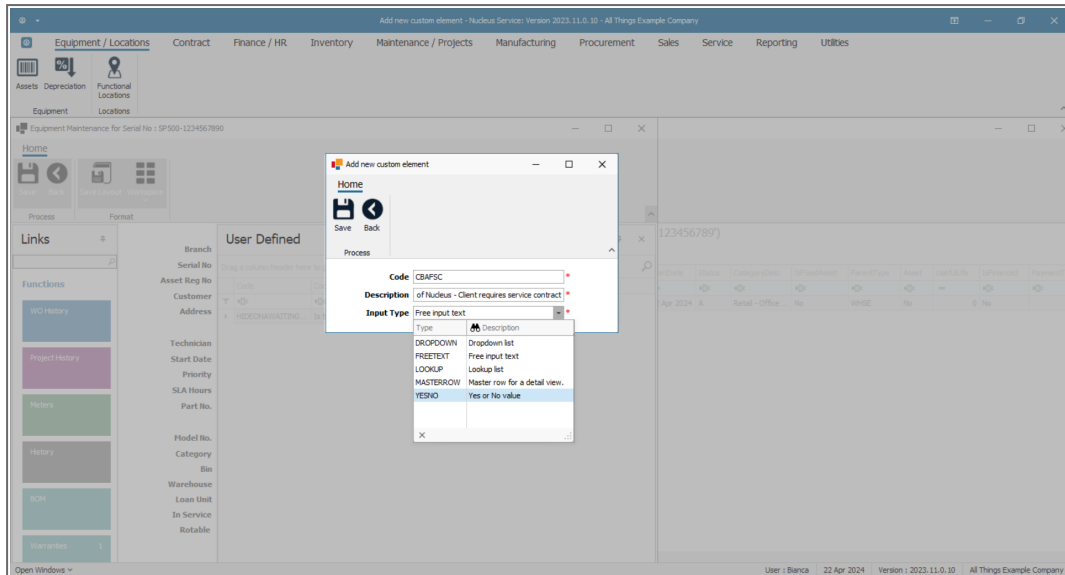
## CODE AND DESCRIPTION

- **Code:** Type in a unique code specific to the custom element you wish to add.
- **Description:** Type in the long, descriptive version of the code above.

**Reminder:** When saved, both of these fields will reflect in the **User Defined** panel in the **Asset Maintain** screen across all assets on the system. Where the asset is linked to a **Call**, the fields will also display in the **Call Maintain** screen.

## INPUT TYPE

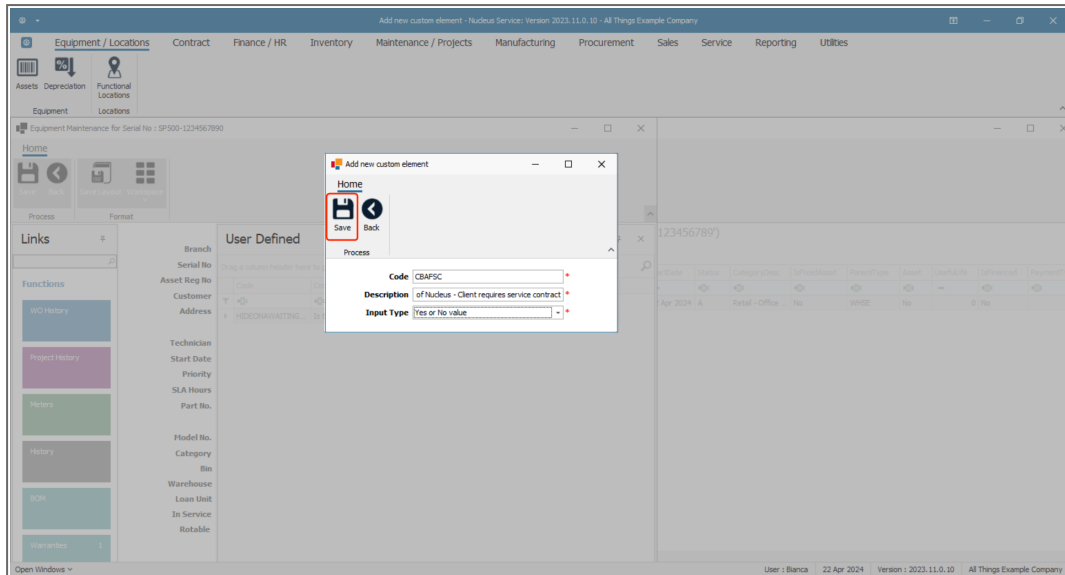
- Click on the drop-down arrow in the **Input Type** field.
- A **Type** menu will display.
- The options are :
  - **FREETEXT - Free Input Text:** you can type data directly into the text box.
  - **LOOKUP - Lookup list:** you can select the desired value from the list. Refer to [Adding Lookup List Items](#) to set up the items for selection.
  - **YesNo - Yes or No Value:** this field is used to collect data with only a 'Yes' or 'No' answer. Until this field is answered one way or the other, the field's value is considered to be missing.



- Important Note - the following options are only relevant to Nucleus Accounts Reporting:
  - **LOOKUP**: Reporting filter lookup list.
  - **MASTERROW**: Master row for a detailed view on reporting.

## SAVE NEW CUSTOM ELEMENT

- When you have finished adding the information to these fields,
- Click on **Save**.



- You will return to the **New Equipment** screen.
- The newly created custom element will be added to the panel.

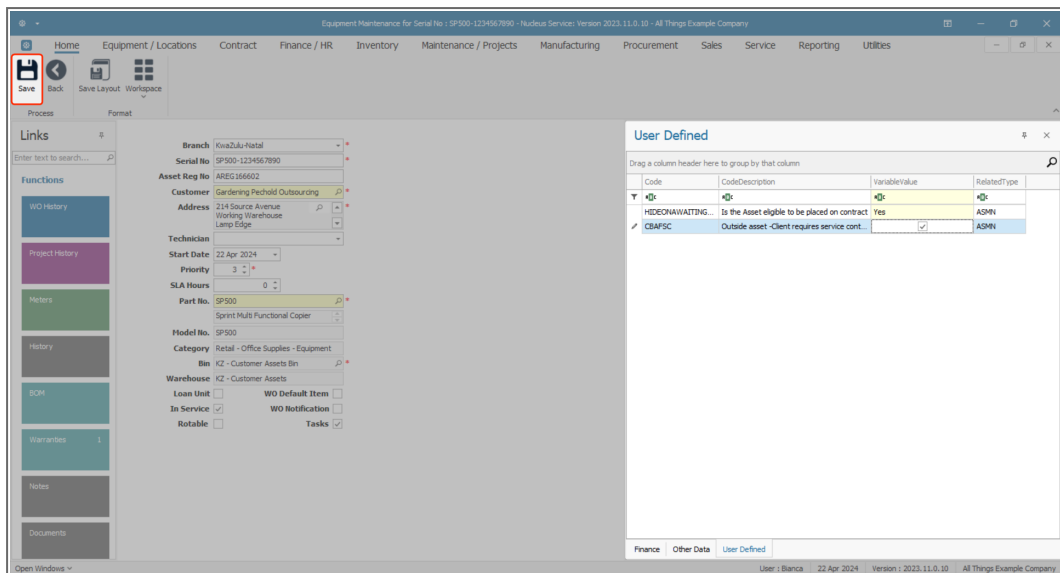
## ADD VARIABLE VALUE

- Click in the **Variable Value**<sup>1</sup> field.
  - As **YesNo** Type was selected in the previous step, you can either Mark or Leave the Checkbox.

**Reminder:** The data added to this **Variable Value** field is unique to the selected asset and will not reflect in any other asset or other module User Defined fields.

- Click on **Save**.

<sup>1</sup>A 'variable value' is a data item whose value can change. In the User Defined Panel, this column can have data added that is unique to the asset selected and will not affect the data of other assets on the system.



- The new custom element will be saved in the User Defined panel and you will return to the **Machine List for []** screen.
- The newly added asset with the new custom element will be indicated in the screen.

## VIEW USER DEFINED PANEL IN THE CALL MAINTAIN SCREEN

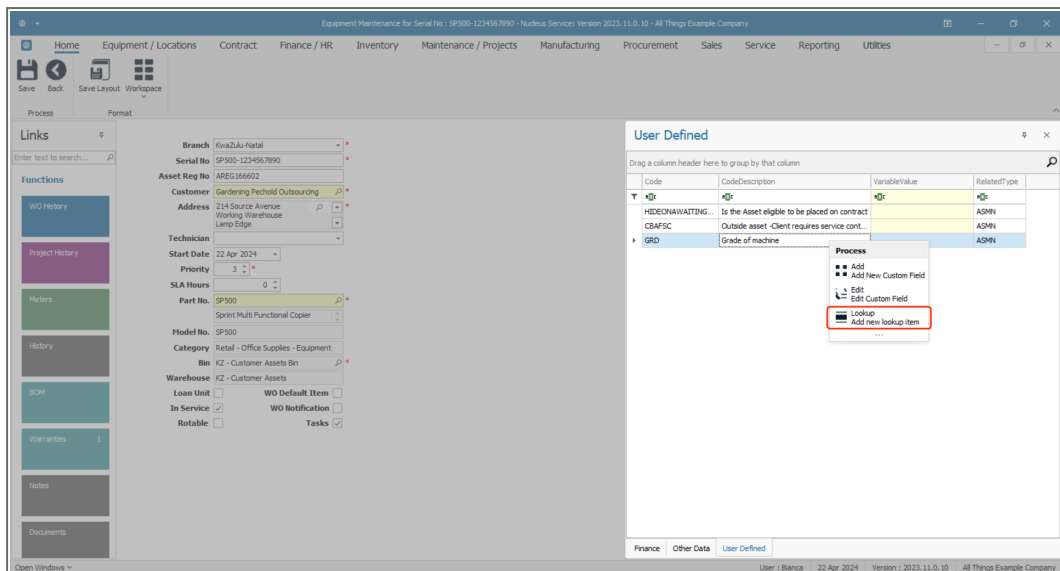
The new Custom Element added in this process will also reflect in the **Call Maintain** screen where this asset is linked to a Call. Either a new Call or an existing Call will have these new details available in the [Calls User Defined Fields](#) panel.

## ADD LOOKUP LIST ITEMS

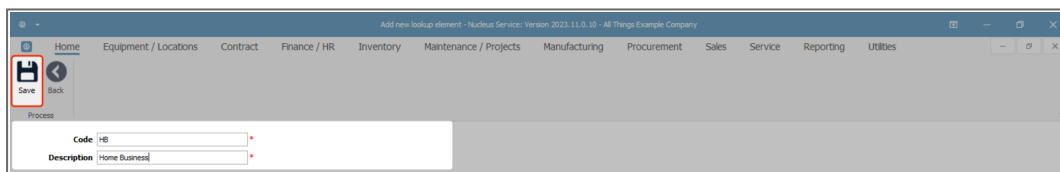
If **LOOKUP list** was selected as the custom element Input Type, lookup options will need to be added to a Lookup Item list.

- Right Click anywhere on the Lookup List item and select **Edit** - Edit Custom field.



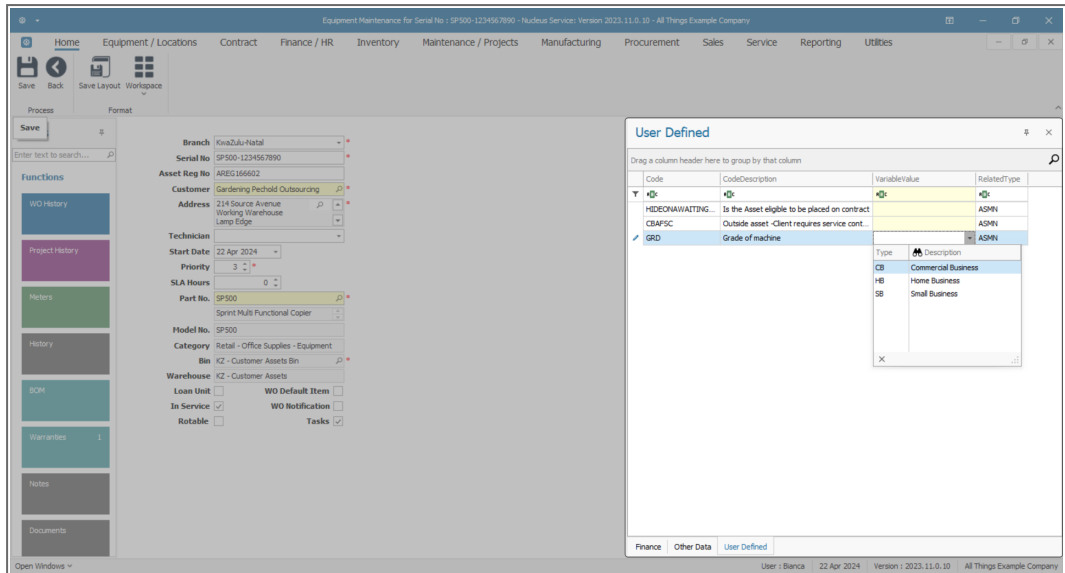


- The **Add new lookup element** screen will open.
- **Code:** Type in a unique code specific to the lookup element you wish to add.
- **Description:** Type in the long, descriptive version of the code above.



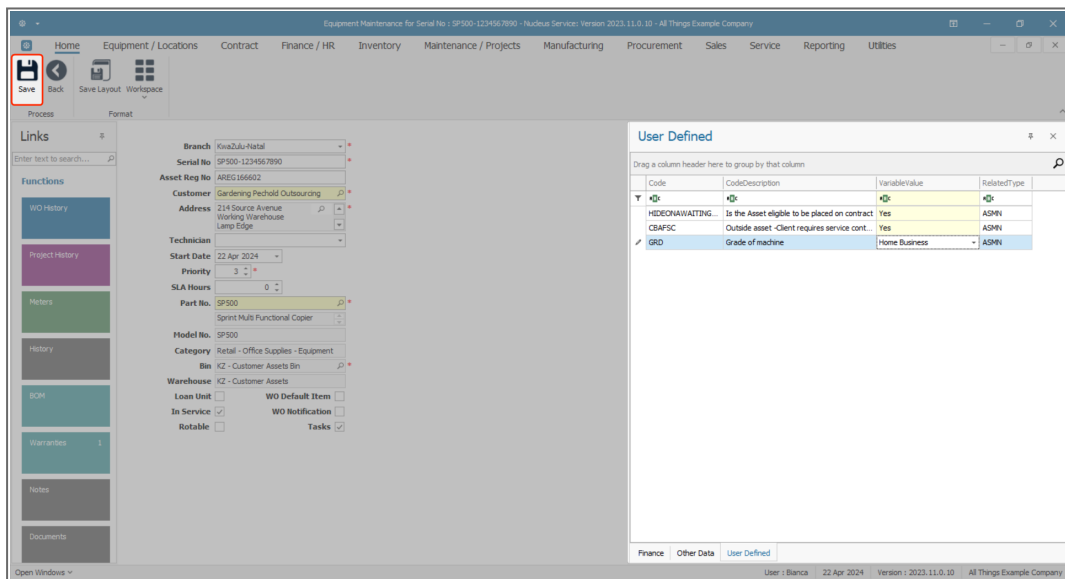
- You will return to the **Equipment Maintenance for Serial No: []** screen.
- Click in the **Variable Value** field of the custom element row.
- A **drop-down arrow** will appear. Click on this arrow.
- A **Type** menu will display.
- The newly added **Lookup List element** will be available in the list.

Follow the process above to add as many lookup elements as required.



## SAVE NEW LOOKUP ELEMENTS AND CUSTOM FIELDS

- When you have finished adding the information to the User Defined fields,
- Click on **Save**.



- You will return to the **Machine List for []** screen.
- You will be able to view the added customer asset in the data grid.

Machine List for KwaZulu-Natal - Nucleus Service: Version 2023.11.0.10 - All Things Example Company

Home Equipment / Locations Contract Finance / HR Inventory Maintenance / Projects Manufacturing Procurement Sales Service Reporting Utilities

Add Edit Delete View Save Layout Workspaces Save Filter All Refresh Buy Back Print Export Reports

Maintenance Format Current Process Print Reports

Links Drag a column header here to group by that column

Enter text to search...

Functions WFO History

Description	PartCode	SerialNo	ModelNo	CustomerName	DepName	StarDate	Status	CategoryDesc	IsFixedAsset	ParentType	Asset	UsefulLife	IsFinanced	PaymentTy
Sprint Multi Functional Copier	SP500	SP500-1234567890	SP500	Gardening Pechold Outsourcing	Sales	22 Apr 2024	A	Retail - Office	No	WHSE	No	0	No	
Sprint Multi Functional Copier	SP2020	SP2020-82352587	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-14463572	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-86990 L38	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	
Sprint Multi Functional Copier	SP2020	SP2020-1234567890	SP2020			29 Sep 2023	A	Retail - Office	No	WHSE	No	60	No	

## Related Topics

- [Assets - Add - User Defined](#)
- [Assets - Add - Finance Details](#)
- [Assets - Add - Other Data](#)
- [Assets - Add - User Defined](#)

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