

We are currently updating our site; thank you for your patience.

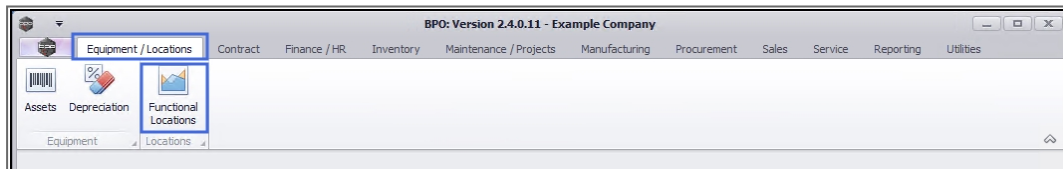
LOCATIONS

TECHNICAL SPECIFICATIONS (CUSTOM USER DEFINED FIELDS)

The inclusion of User Defined Fields is to provide more information within the Asset, Contract, Customer and Location modules so that associated work/processes can be carried out more efficiently. It will serve as connective tissue between contracts and call center functions to improve call center performance by having readily accessible information.

Version Compatibility¹

Ribbon Access: Equipment / Locations > Functional Locations

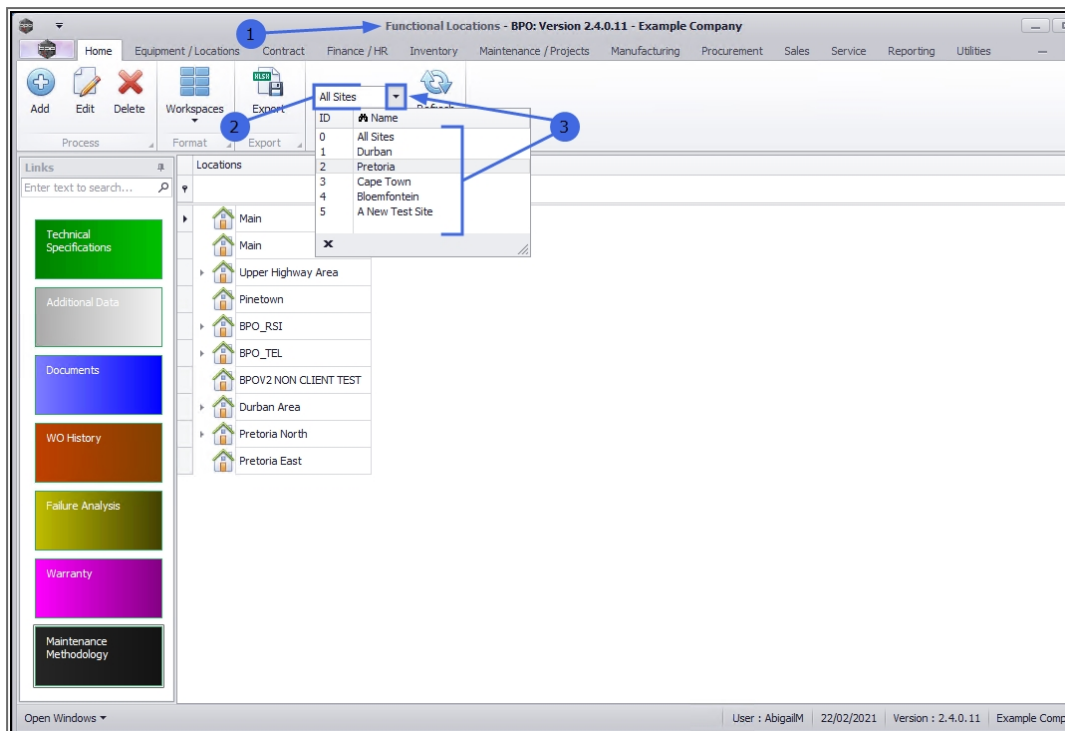


1. The **Functional Locations** screen will be displayed.

SELECT THE SITE

2. This screen will open by default with the Sites filter set to **All Sites**.
3. You do not need to select a specific site, however if you wish to narrow your filter parameters, you can click on the drop-down **arrow** and select a particular site from the list.

¹ BPO2 v2.5.0.8 or higher. " [Add Interest Rate](#) " on page 3



SELECT THE LOCATION

1. Select the **row** of the **location** where you wish to view the Technical Specifications.

MAIN LOCATION

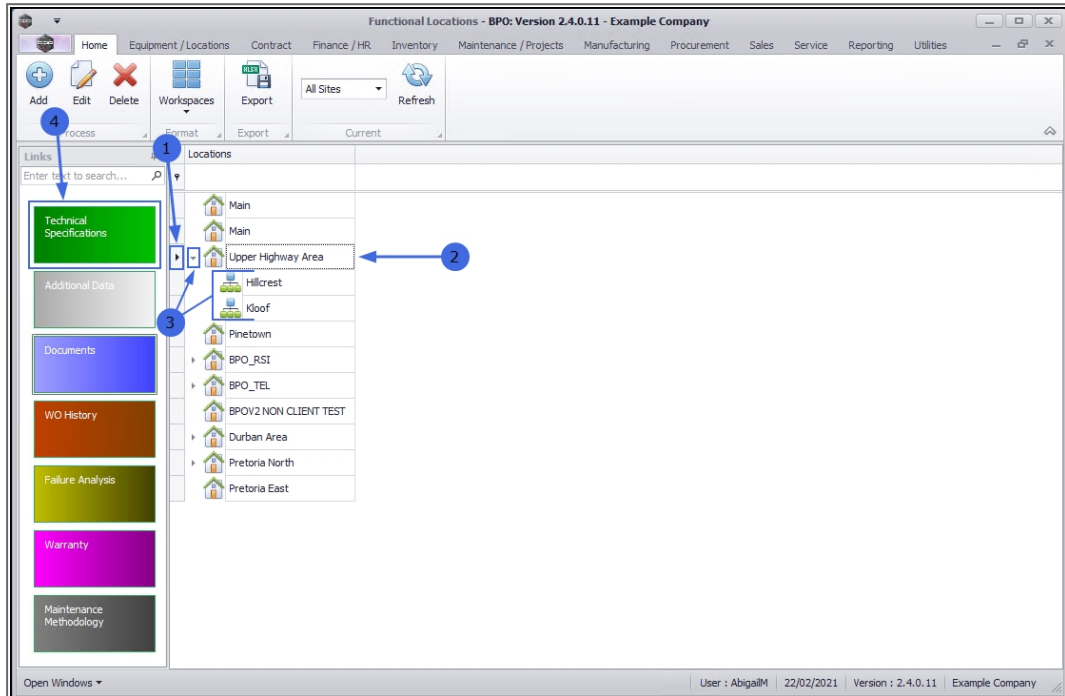
2. If you wish to view the Technical Specifications of a main location, select the **row** of that main location. In this example **Upper Highway Area** is a main location.

SUB-LOCATION

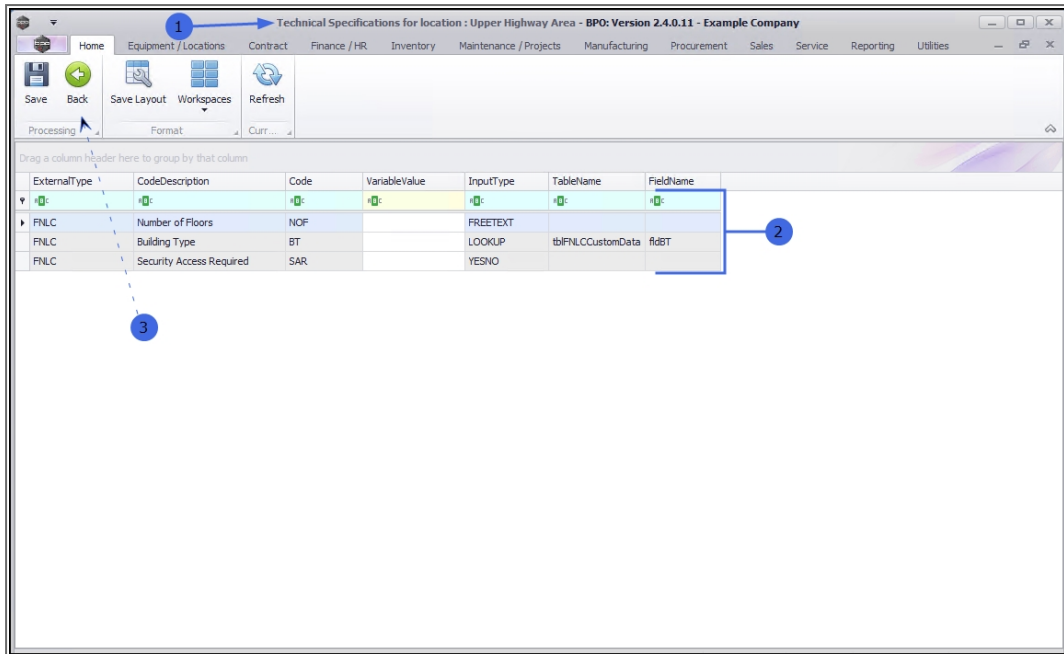
3. If you wish to view the Technical Specifications for a sub-location, ensure that you **expand** the main (parent) location to be able to view and select the row of that sub-location. In this example, **Hillcrest** and **Kloof** are sub-locations of Upper Highway Area.

VIEW TECHNICAL SPECIFICATIONS

- When you have selected the right location, click on the **Technical Specifications** tile.

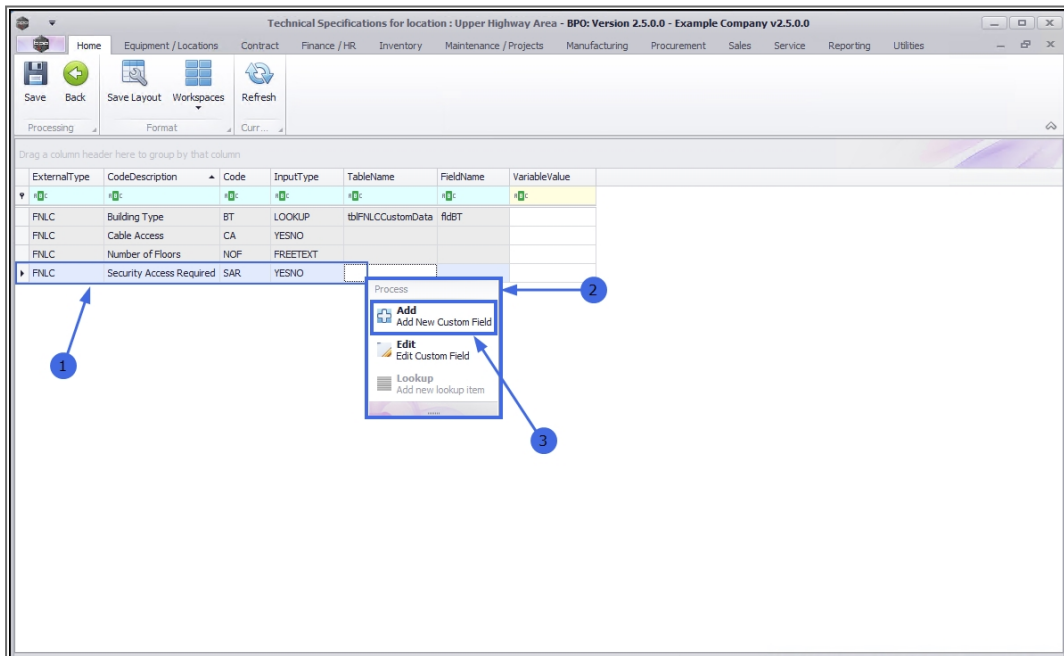


- The **Technical Specifications for location: []** screen will open.
- Here you can view a list of **Technical Specifications** currently on the system.
- There is no **Add** or **Edit** processing button as this screen utilises the right click functionality.



ADD NEW SPECIFICATION

1. Right click in any row.
2. A **Process** menu will pop up.
3. Click on **Add** - Add New Custom Field.

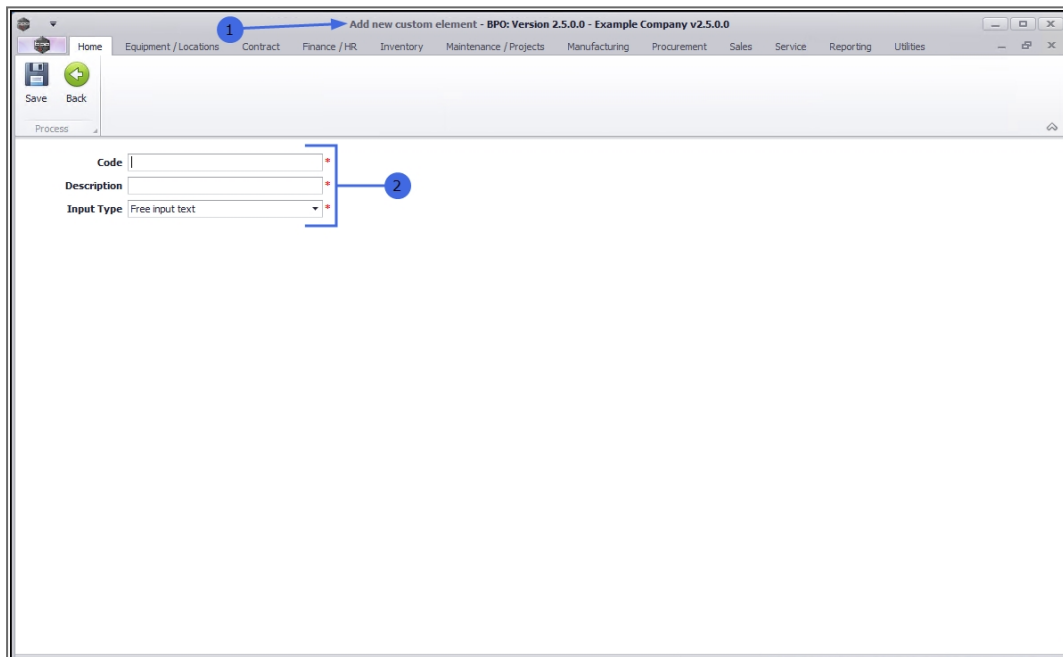


1. The **Add new custom element** screen will open.

ADD NEW SPECIFICATION DETAILS

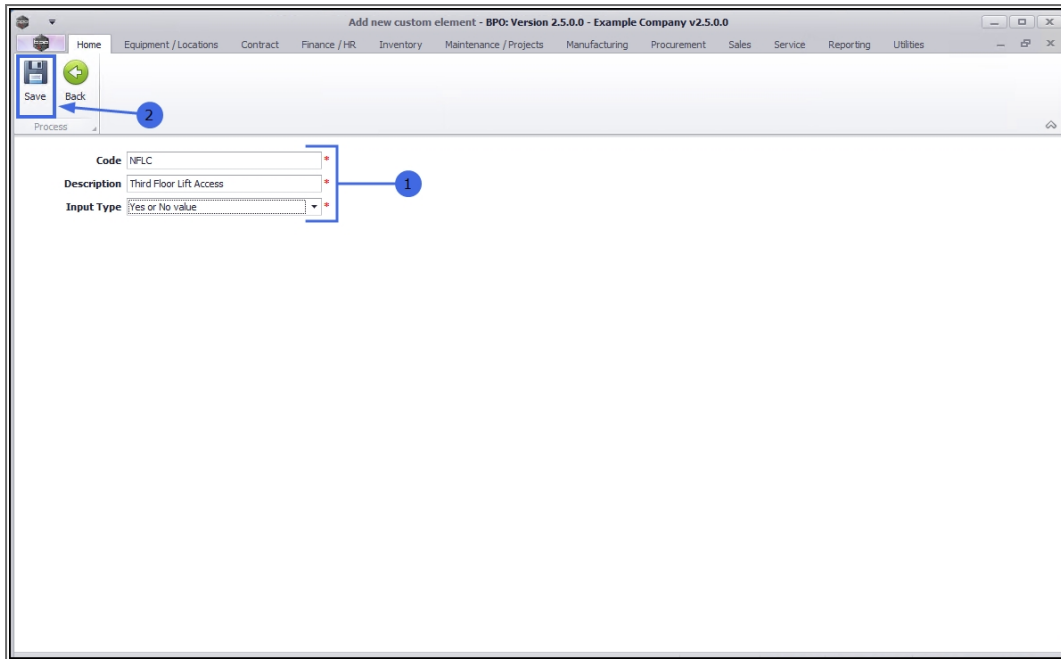
New User Defined Customer Fields can be created from here. Any User Defined field created will be available for update on all suppliers.

2. Add the technical specification details:
 - **Code:** Type in a specific code for this new custom element.
 - **Description:** Type in a description for the code in the previous field e.g. number of floors, cable access.
 - **Input Type:** Type in the input type for this element e.g. Free input text, Lookup list, Yes or No value.



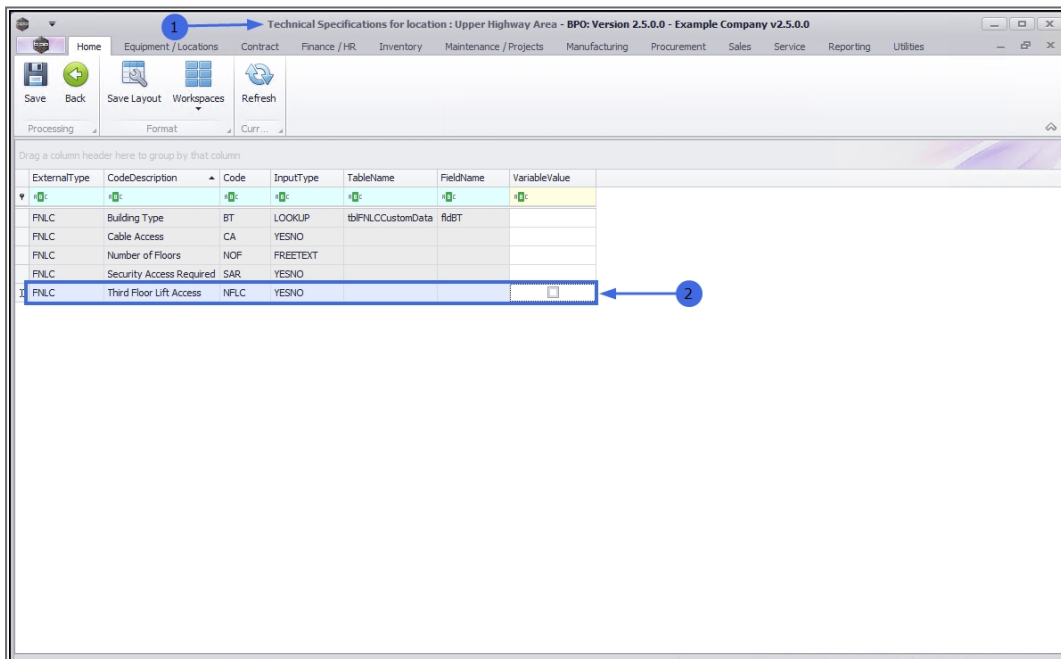
SAVE NEW SPECIFICATION

1. When you have added the new technical specification details,
2. Click on **Save**.



VIEW NEW SPECIFICATION

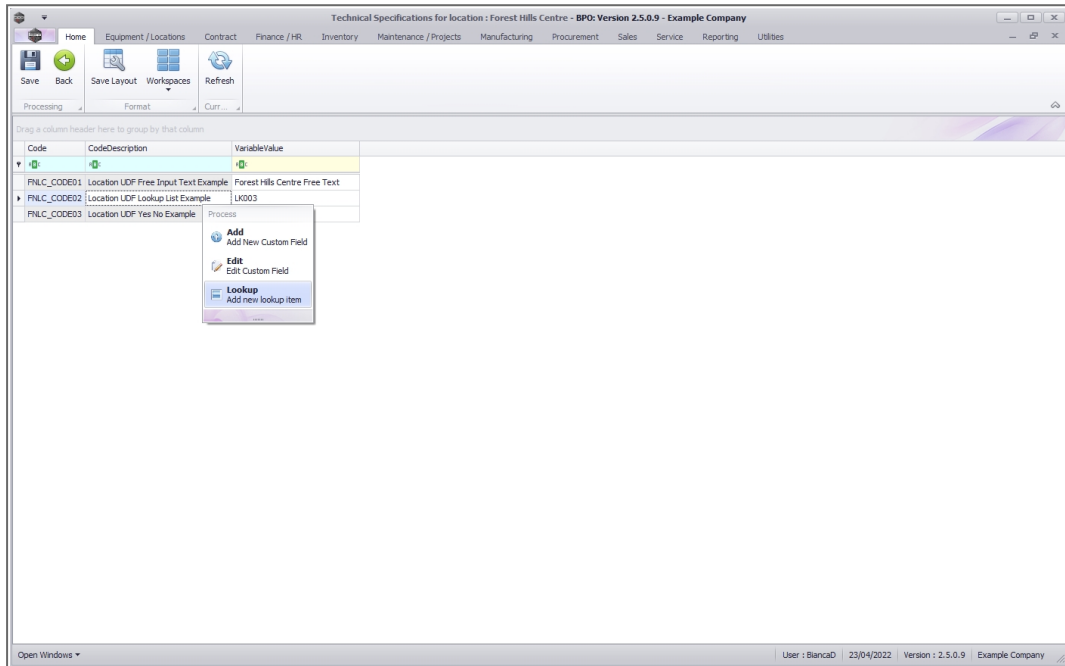
1. You will return to the **Technical Specifications for location: []** screen.
2. The new specification is added to the data grid.



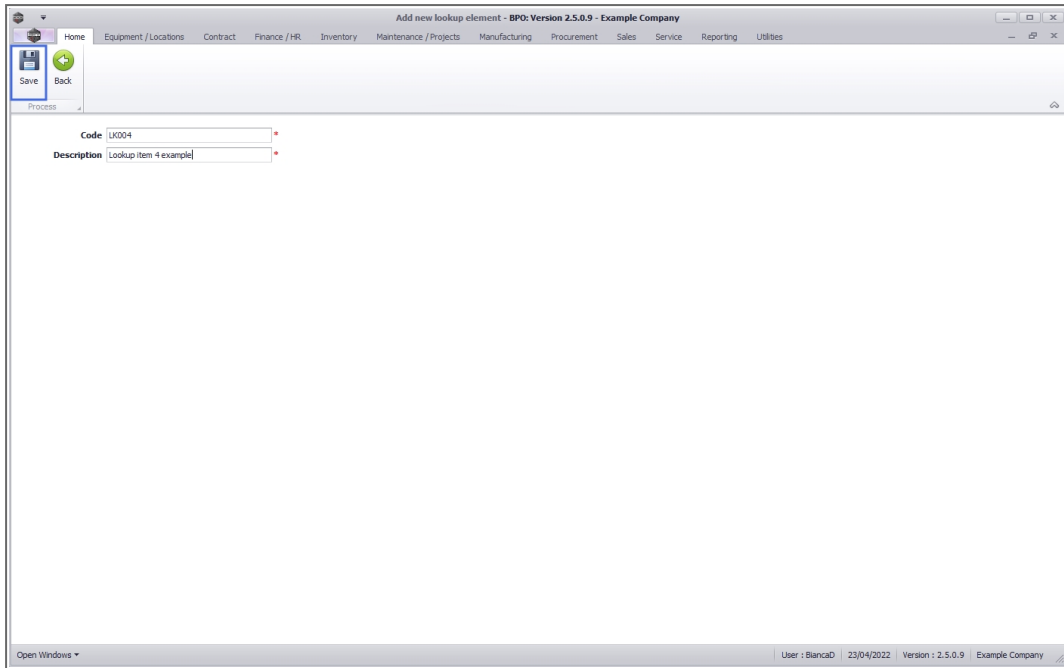
ADD LOOKUP ITEMS

For Lookup Input Variables - the right click context menu includes the option to add items to the Lookup List.

- Right click on Lookup input type Custom Field and select **Add new lookup item** (you may need to scroll down).



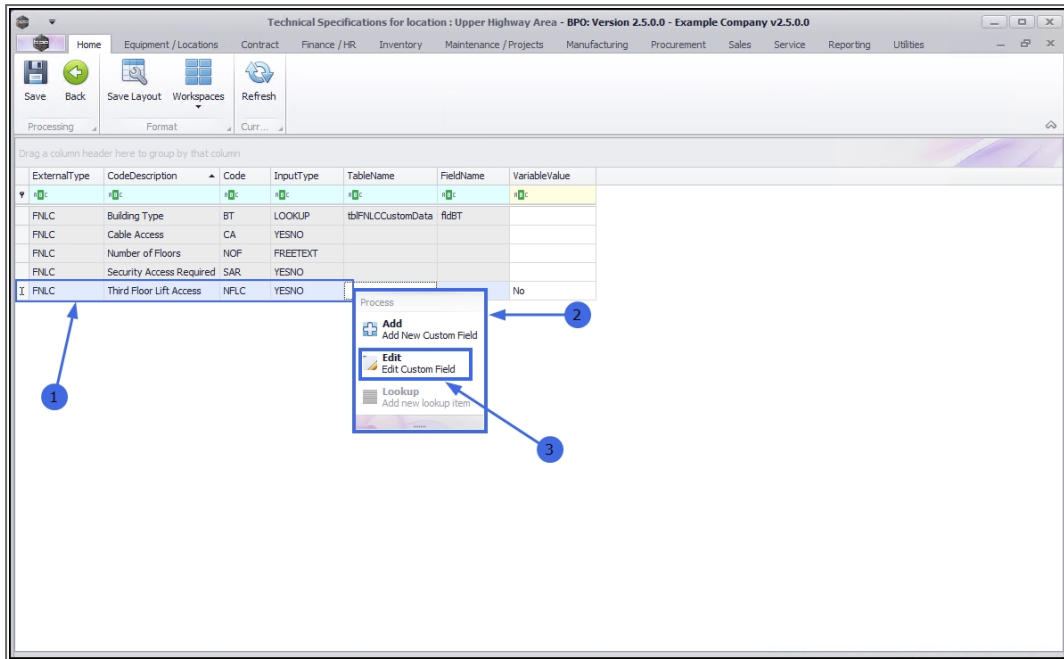
- Type in the lookup item **Code** and **Description**.
- Click on the **Save** button.



EDIT SPECIFICATION

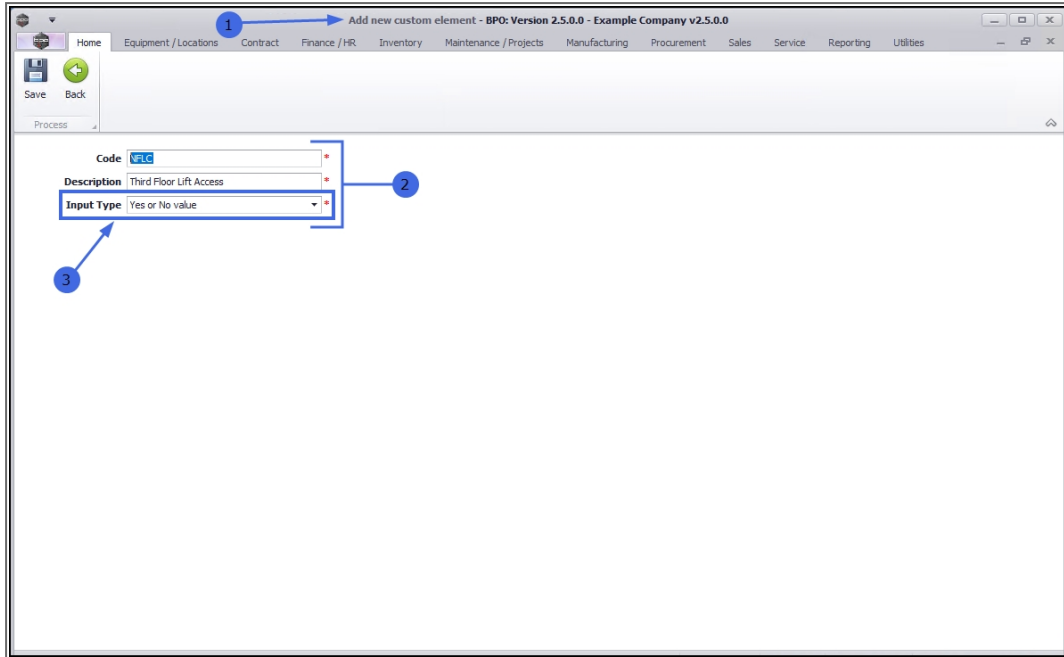
SELECT SPECIFICATION

1. Right click in the **row** of the Technical Specification where you wish to make changes.
2. The **Process** menu will pop up.
3. Click on **Edit** - Edit Custom Field.



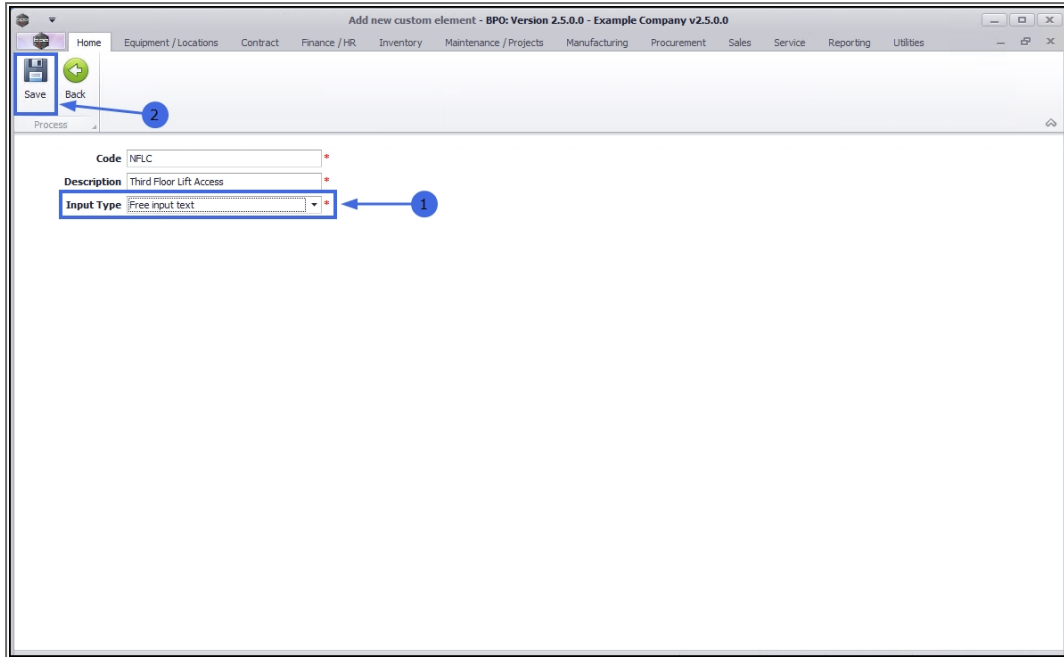
EDIT SPECIFICATION DETAILS

1. The **Add new custom element** screen will open.
2. The details of the specification selected in the previous screen will populate the fields.
3. Make the changes to the detail as required.
 - In this example the **Input Type** is to be edited.



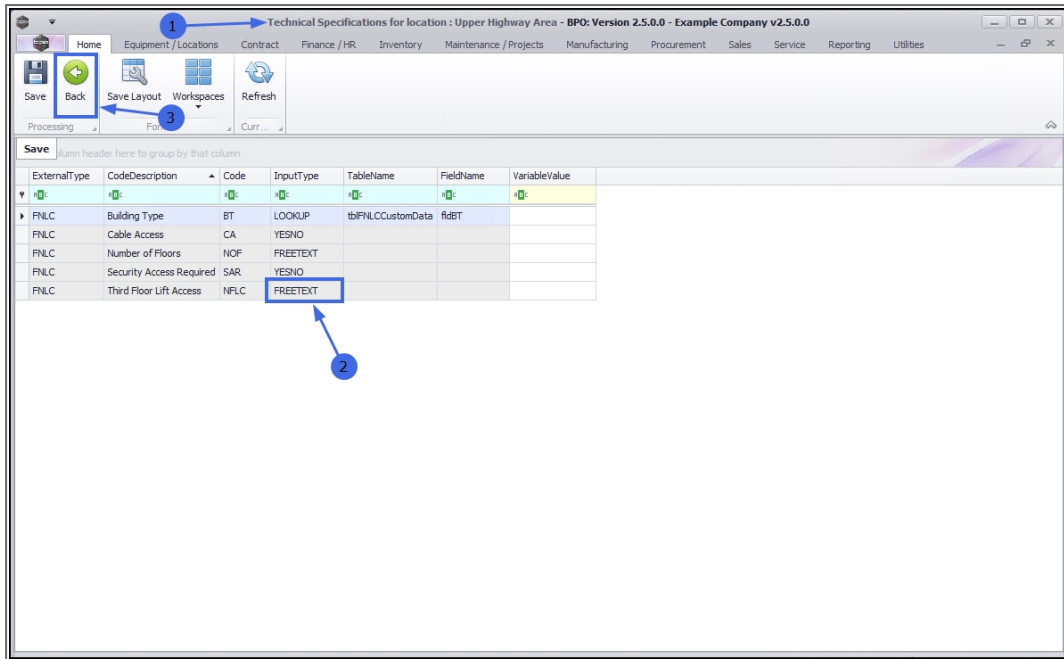
SAVE SPECIFICATION CHANGES

1. When you have finished edited the custom element details;
 - In this example, the **Input Type** has been changed to **Free input text**.
2. Click on **Save**.

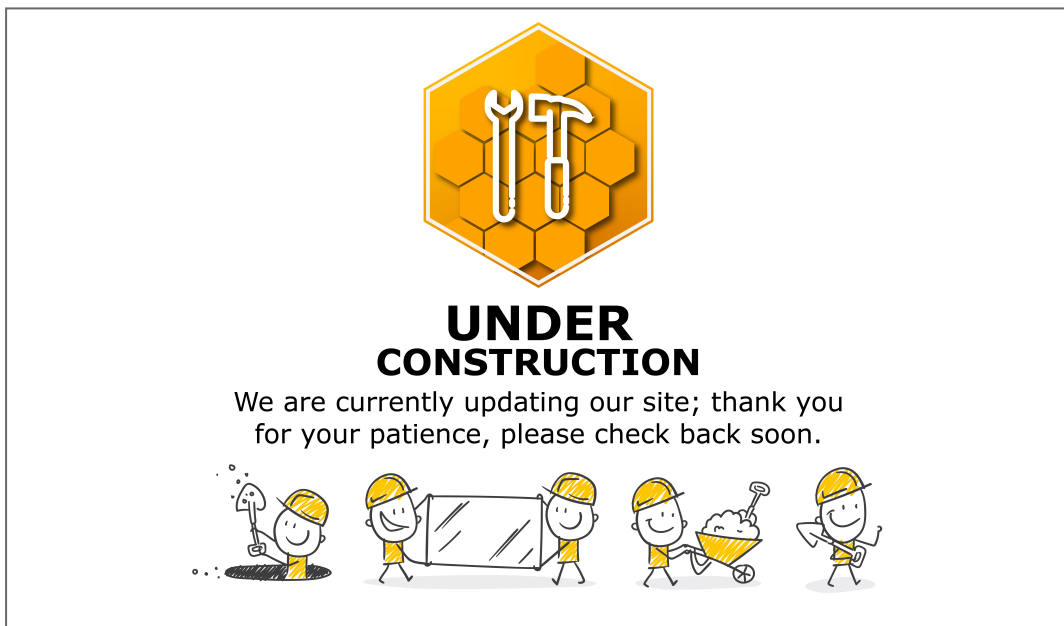


VIEW SPECIFICATION CHANGES

1. You will return to the **Technical Specifications** for location screen.
2. The data grid will be updated with the edits made in the previous screen
 - In this example, the **Input Type** column now displays **FREETEXT**.
3. Click on **Back** to return to the **Functional Locations** screen.



This topic is currently being updated. Thank you for your patience, please check back soon.



Related Topics

- [Introduction to Functional Locations](#)
- [Add a New Functional Location](#)
- [Edit a Functional Location](#)
- [Delete a Functional Location](#)
- [Location - Additional Data](#)
- [Location - Documents](#)
- [Location - Work Order History](#)
- [Location - Failure Analysis](#)
- [Location - Warranty](#)
- [Location - Maintenance Methodology](#)
- [Location - Add a New Location Contract](#)

MNU.001.007

