

# EQUIPMENT

## ASSETS - EDIT - USER DEFINED FIELDS

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

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.

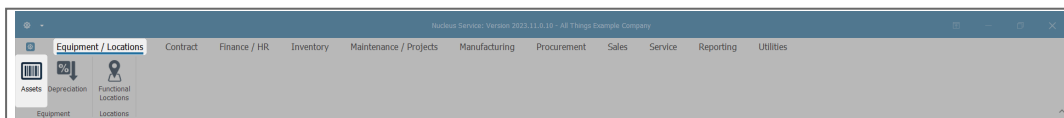
This topic will expand on how to **edit** the User Defined custom fields for a selected asset. Not all custom fields can be edited in the same way, it depends on what Input Type they have been set up with.



**Note:** It will be useful to familiarise yourself with the [Add Asset User Defined](#) topic before progressing with this manual.

## 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	IsFixed/Asset	ParentType	Asset	Usefullife	IsFinancial	PaymentTy...	SupplierNo...	FinanceTy...	PaymentDay
Sprint Multi Functional Copier	A300	A300-38296751	A300	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A500T	A500T-81227702	A500T	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A9603	A9603-0259423	A9603	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	A990	A990-79939007	A990	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	AV5588	AV5588-99487269	AV5588	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	BF1470	BF1470-58075119	BF1470	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	B29352	B29352-84039403	B29352	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	C9800	C9800-84555546	C9800	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CD7752	CD7752-98637847	CD7752	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	CT3690	CT3690-83617863	CT3690	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D08750	D08750-63955854	D08750	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D86547	D86547-91142229	D86547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	D549600	D549600-17186312	D5496...	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EA3V866	EA3V866-56846448	EA3V866	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EC7536	EC7536-69835409	EC7536	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EE0258	EE0258-91209854	EE0258	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	EV1P559	EV1P559-90097518	EV1P559	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F9214	F9214-84294603	F9214	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	F88238	F88238-77322811	F88238	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	FW8520	FW8520-86142055	FW8520	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GL6547	GL6547-65971345	GL6547	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	GH4564	GH4564-37265793	GH4564	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	H1475P	H1475P-11445157	H1475P	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	HV1591	HV1591-10708704	HV1591	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	IP9885	IP9885-39929256	IP9885	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	JQ3537	JQ3537-49186181	JQ3537	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	K3500	K3500-09718569	K3500	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1
Sprint Multi Functional Copier	KP9323	KP9323-40271894	KP9323	Gardening Fechold Outsourcing	Sales	04 Oct 2...	A	Retail - ORL...	No	CTRT	No	0	No				1

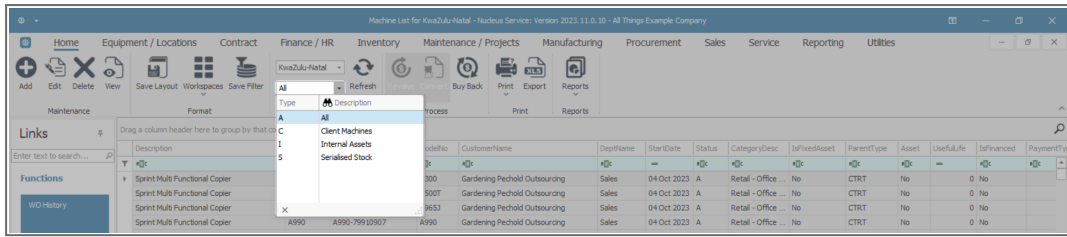
## Select the Site

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.

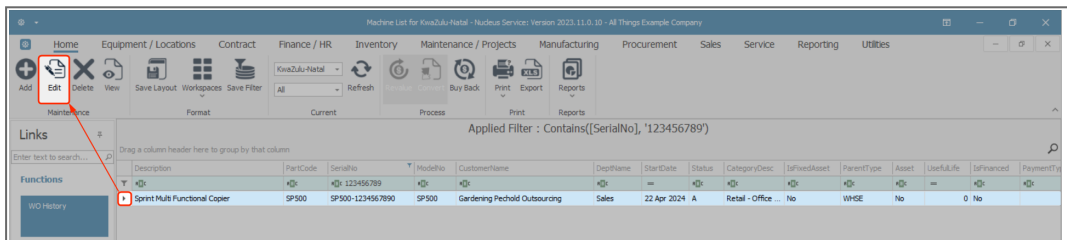
If **All Sites** displays here, then you do not have a default site configured on your user record, and need to select the required site.

- By default, this screen will open with the **Type** filter set to **'All'**, listing all of the assets on the system (Customer Assets, Internal Assets and Serialised Stock Items).
- You can click on the **drop-down arrow** in the **Type** field and select an alternative Type, (such as Client Machines), if required.

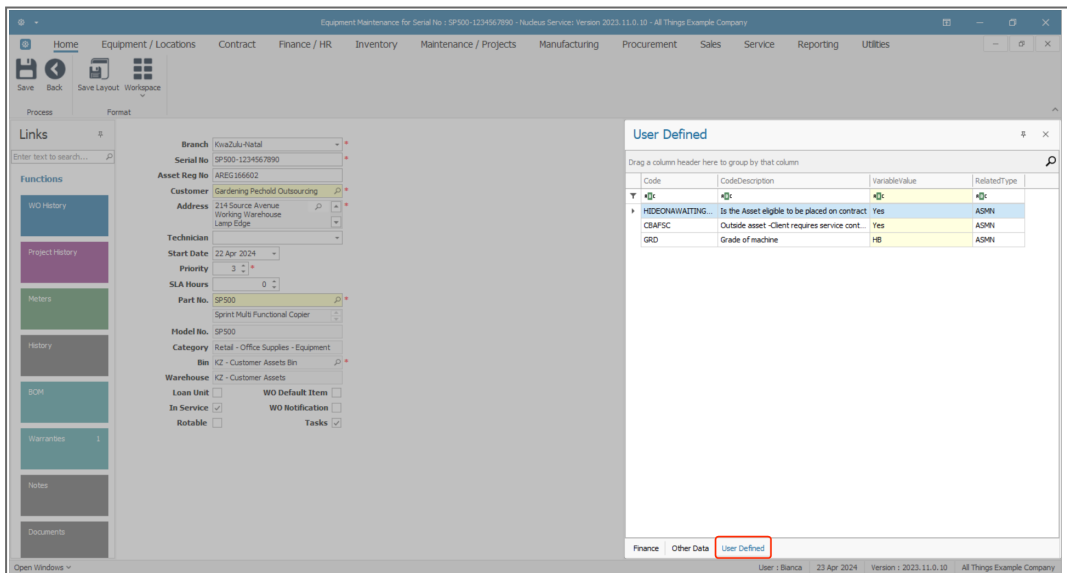


## SELECT THE ASSET

- Select the **row** of the **asset** you wish to **edit**.
- Click on **Edit**.



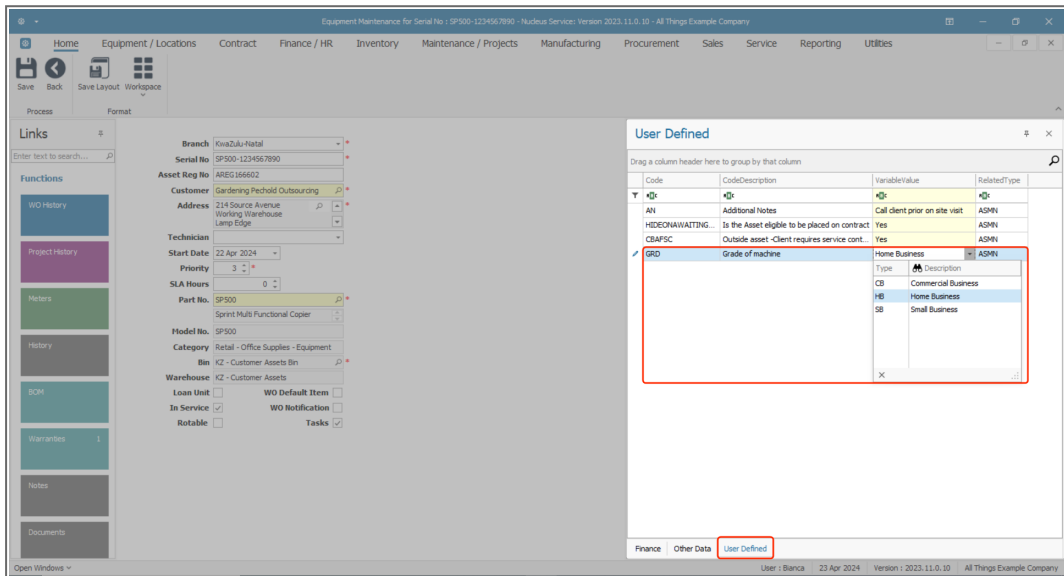
- The **Equipment Maintenance for Serial No: []** screen will open.
- If the User Defined field is not yet extended, click on the **User Defined** tab.
- The **User Defined** panel will open.



## EDIT VARIABLE VALUES

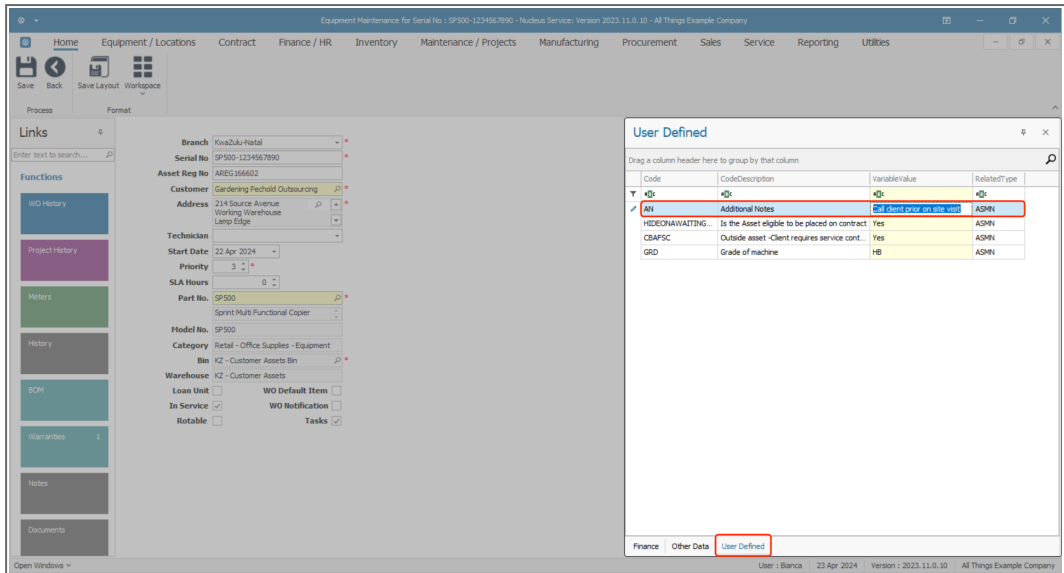
### LOOKUP LIST

- Click on the **Variable Value** field and select an item from the lookup list.



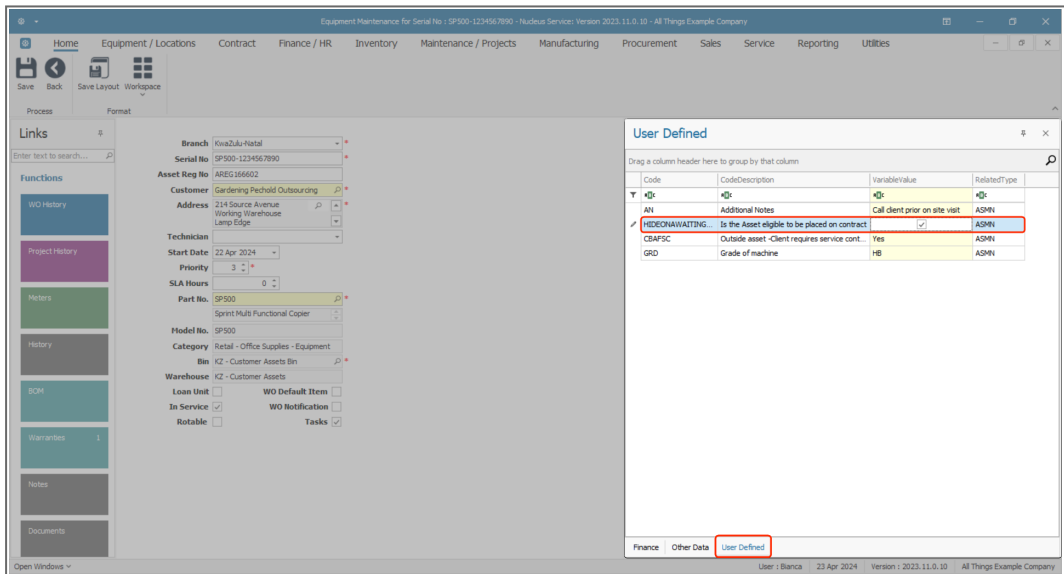
### FREE INPUT TEXT

- Click in the Variable Value field and either modify the original text or delete and add new text, as required to make the correct changes.

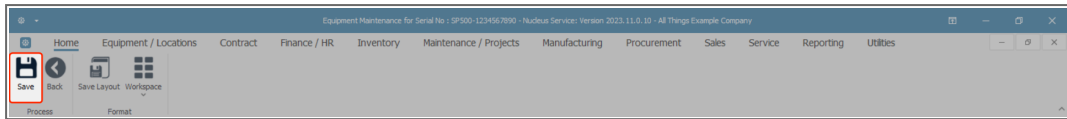


## YES OR NO VALUE

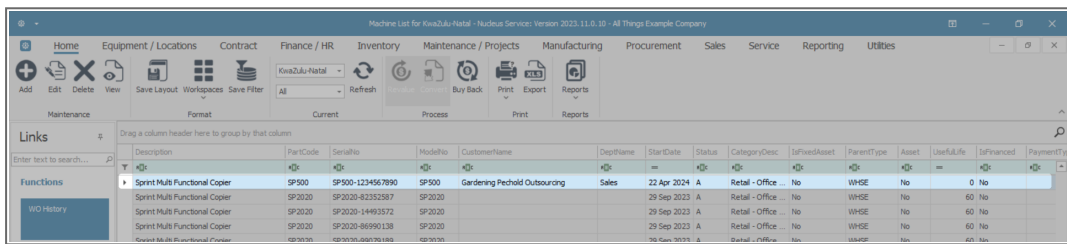
- Clicking in the **Yes or No** variable value field will bring up a **check box**. Select and Unselect the **check boxes** required.



- When you have finished editing the **Variable Values** of the asset User Defined fields, click on **Save**.



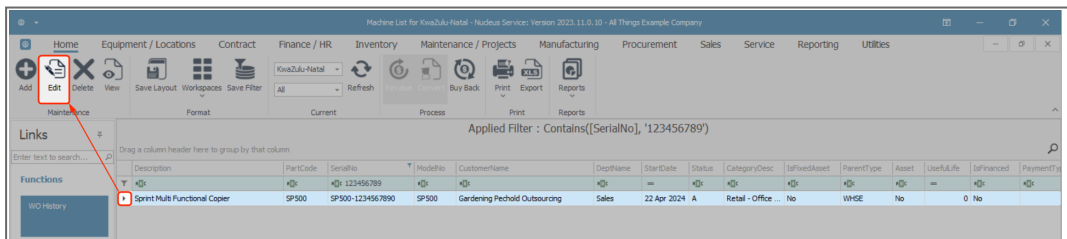
- Your changes will be saved and you will return to the **Machine List for []** screen.
- The edited asset will be selected in the data grid.
- You will return to the **Machine List for []** screen.
- You will be able to view the added customer asset in the data grid.



## EDIT CUSTOM FIELDS

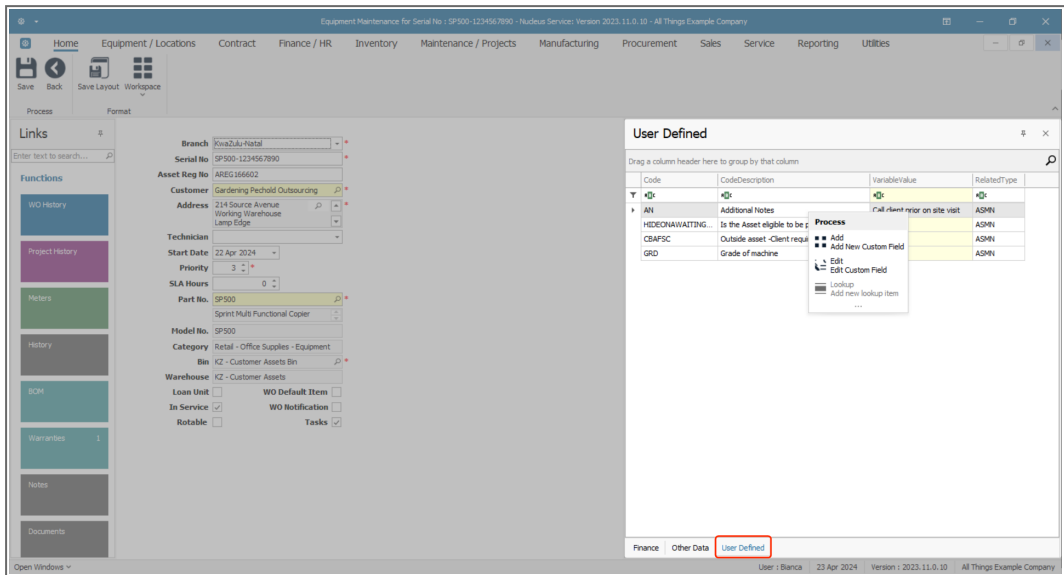
Follow the processes set out below to edit the **custom fields**.

- Select the **row** of the **asset** you wish to **edit**.
- Click on **Edit**.



- Right-click in the **row** of the custom field where you wish to make changes.
  - Ensure that you have selected a custom field that has **Input Type: Lookup List**.

- A **Process** menu will pop up.
- Click on **Edit** - Edit Custom Field.

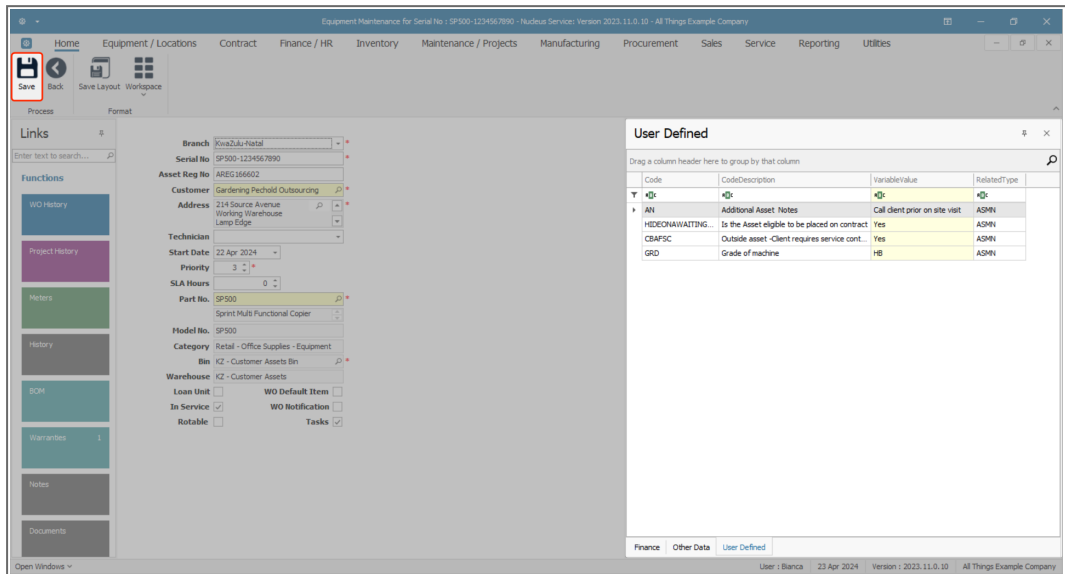


- The **Add new custom element** screen will open.
  - Even though the screen title is **Add new custom element**, you can edit some of the details from here.
- The **Code**, **Description** and **Input Type** can be edited for **Yes / No** and **Free input Text** user defined fields. For **Lookup List** only the **Description** can be edited.
- Click on **Save** when done.



- You will return to the **Equipment Maintenance for Serial No: []** screen.
- The **Code Description** has been updated in the User Defined panel.

- When you have finished making changes to the User Defined fields, as required,
- Click on **Save**.



Follow the process to navigate to the Call Maintenance screen and [Calls User Defined Fields panel](#), with the updated custom fields.

## Related Topics

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

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