

INVENTORY

PARTS – ADD PART DEFINITION USER DEFINED

A **User Defined** panel has been added to the **Part Maintain** screens: the **Add new part** screen and the **Edit Part** screen.

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

These custom fields benefit the user in the following ways:

- They cut down the transition time between screens.
- They reduce 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 **Inventory - Parts** module can be used to add extra information relevant to the selected part definition.

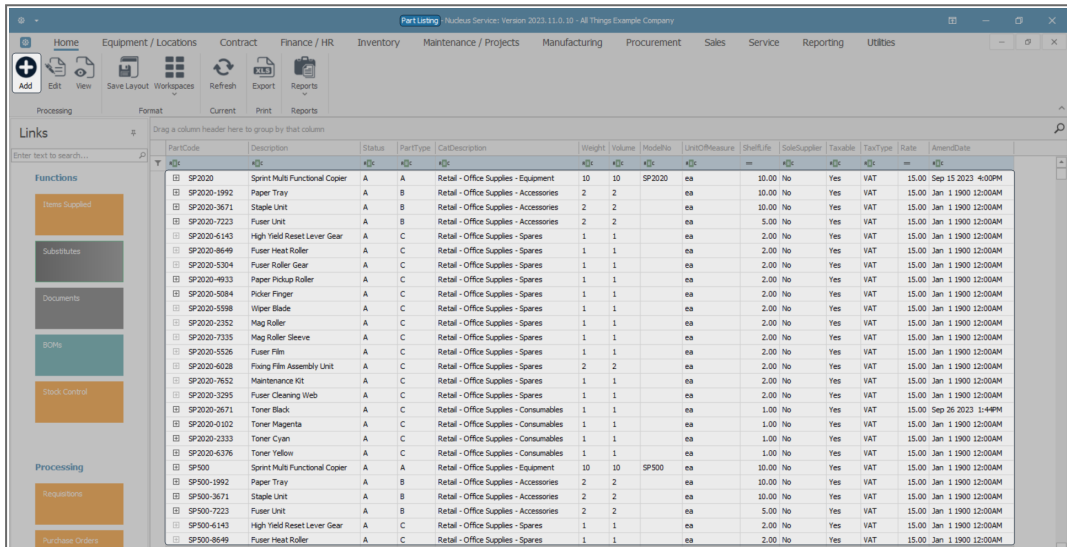
The added fields will reflect in the **User Defined** panel in the **Add new Part** screen and the **Edit Part** screen across all part definitions on the system, but the **Variable Values** selected for each **User Defined** field will be unique to the selected part definition.

Follow the process below to **add** User Defined custom fields to a part definition.

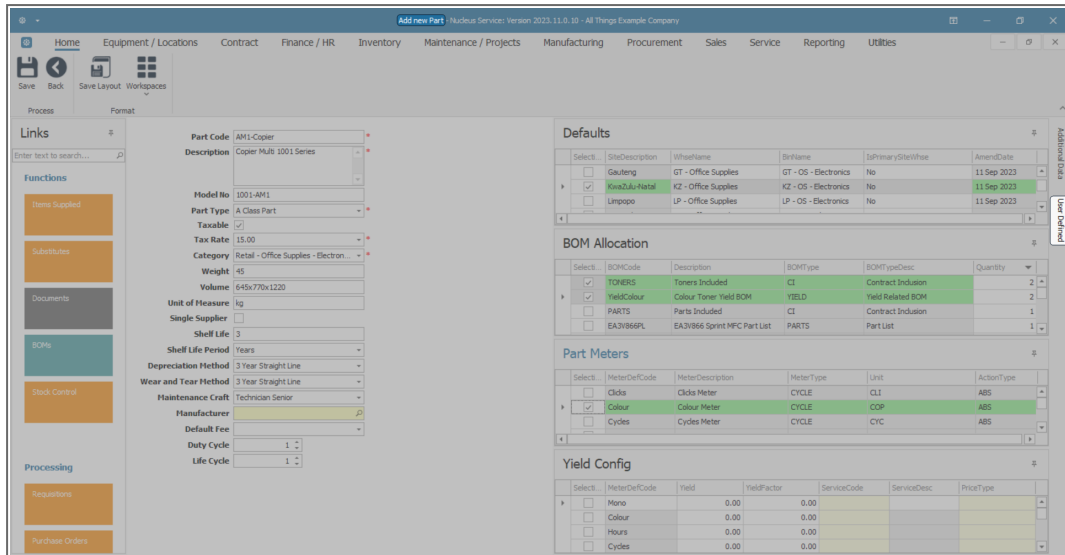
Ribbon Select **Inventory > Parts**



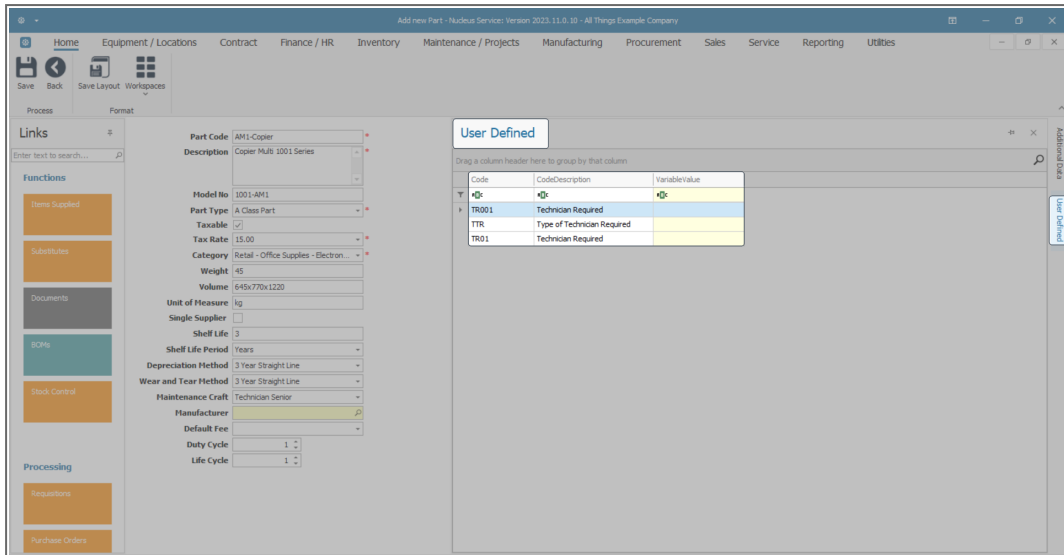
- The **Part Listing** screen will open.
- The data grid will display a list of all the part definitions currently on the system.
- Click on **Add**.



- The **Add new Part** screen will open.
- Once the following information has been added to this screen:
 - [Part Definition Details](#)
 - [Part Definition Defaults](#)
 - [Part Definition BOM Allocation](#) (if applicable)
 - [Part Definition Part Meters](#) (if applicable)
 - [Part Definition Yield Config](#) (if applicable)
- Click on the **User Defined** tab.

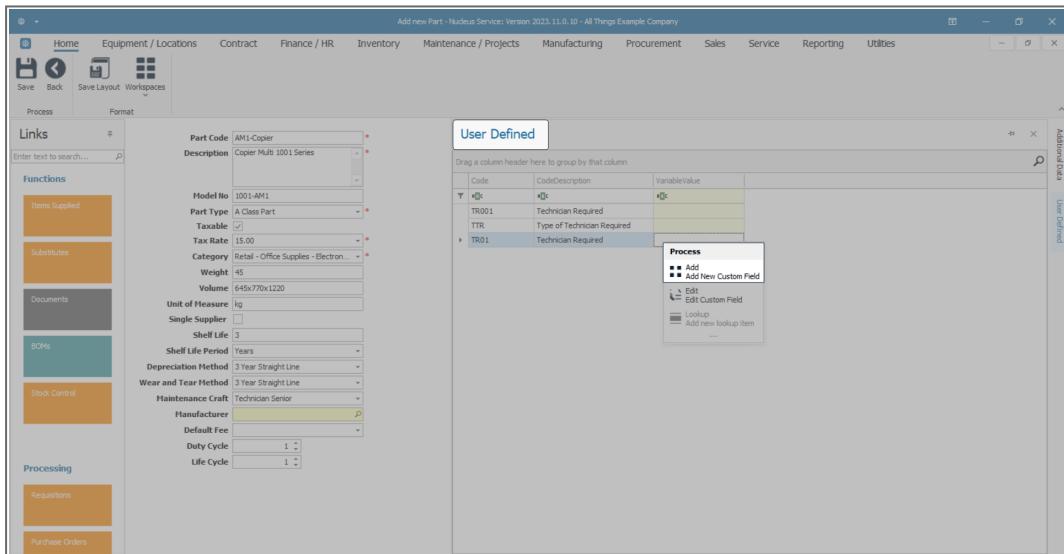


- The **User Defined** panel will expand.
- If there is an existing **Code(s)** in the data grid, then a **User Defined custom field** has already been added to another part definition in the system.
- The **Code** and **Code Description** are not specific to an individual part definition. When a Code and Description are entered and saved here, they are subsequently available in every part definition **User Defined** panel.
- The **Variable Value** is unique. These are set up per specific part definition.



ADD NEW CUSTOM ELEMENT

- **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 [*].

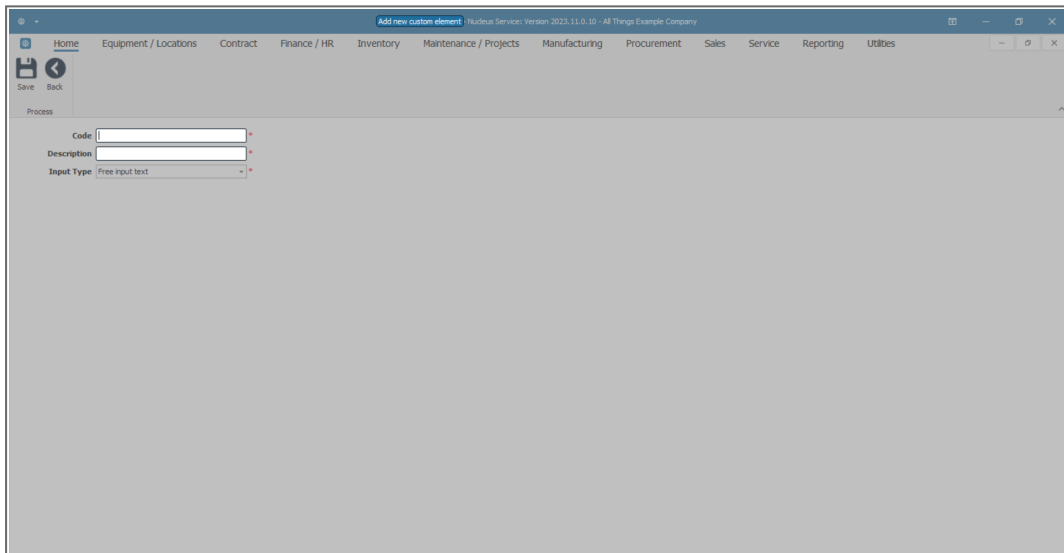


Note: These fields can be populated according to **individual** company requirements. The example given here is pertinent to the system being demonstrated and is not universal.

CODE AND DESCRIPTION

- **Code:** Type in a unique code specific to the custom field 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 **Part Maintain** screen across all part definitions on the system.



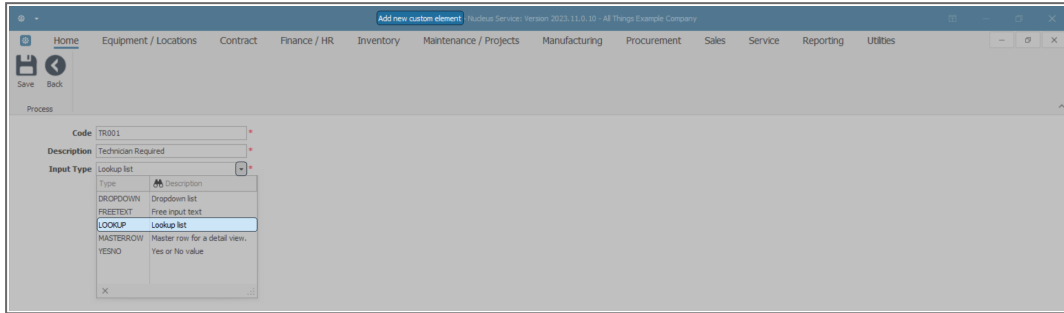
In this example we are documenting information relevant to a particular part definition: a copier machine. The data added to this screen will therefore be pertinent to the copier industry. However, any data relevant to this module for the specific user and their company can be added here.

- In this example, the **Code** and **Description** added are relevant to the database of the demonstrating system: **TTR - Type of Technician Required**.

INPUT TYPE

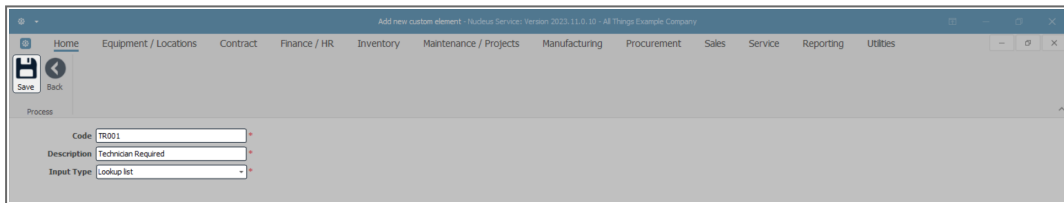
- Click on the drop-down arrow in the **Input Type** field.
- A **Type** menu will display.
- The options are :
 - **DROPDOWN** - Dropdown list is solely used in **Nucleus Accounts** for Reports filtering.
 - **FREETEXT** - **Free input text**: you can type data directly into the text box.
 - **LOOKUP** - **Lookup list**: you can select the desired value from the list.
 - **MASTERROW** - Master row for a detail view: is solely used in **Nucleus Accounts** for Reports filtering.
 - **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.
- Select the Type that is most applicable to the custom element being added.
- In this example, the **LOOKUP** list selection seems the most congruous for the following reasons:
 - **YESNO** does not give the right parameters needed for the user to select what type of technician is required to install and / or service this part.

- The **FREETEXT** selection could be used, but a lookup list would give a more restricted selection which in this case would help prevent the potential of human error.



SAVE NEW CUSTOM ELEMENT

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

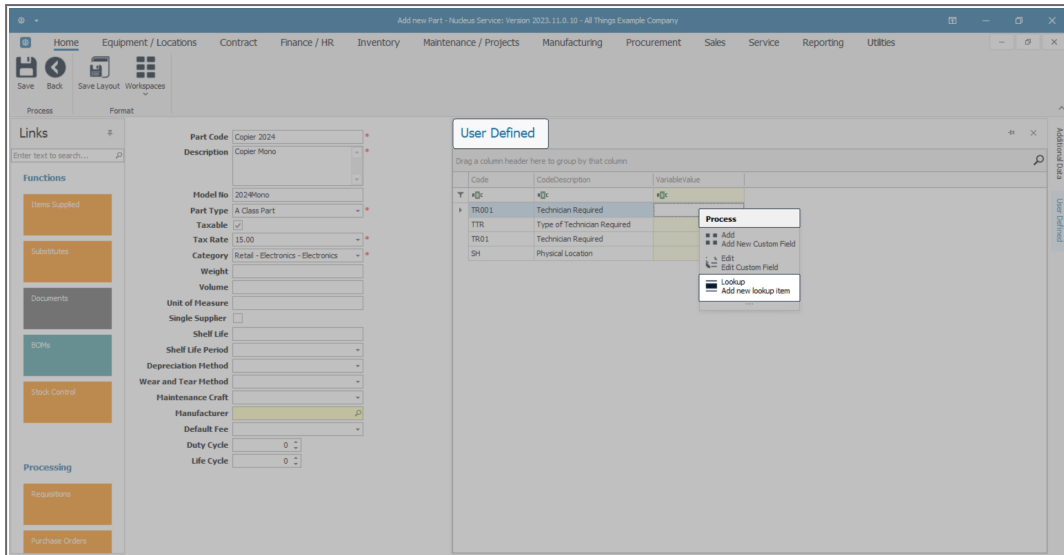


- You will return to the **New Equipment** screen.
- The newly created custom element will be added to the panel.

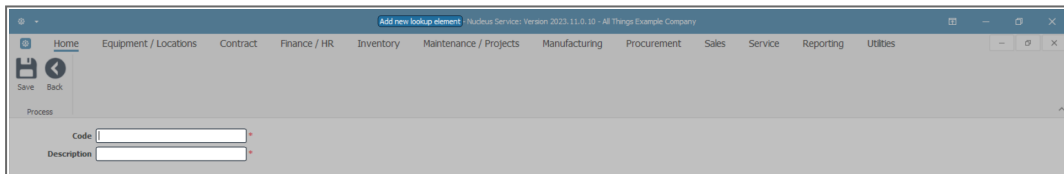
ADD LOOKUP FIELDS TO THE CUSTOM ELEMENT

If the **Lookup Input Type** was selected in the previous step, **Lookup** options will need to be added to a **Lookup** Item list.

- Right-click in the **row** of the new custom element.
- A **Process** menu will display.
- Select **Lookup - Add new lookup item** from the list.



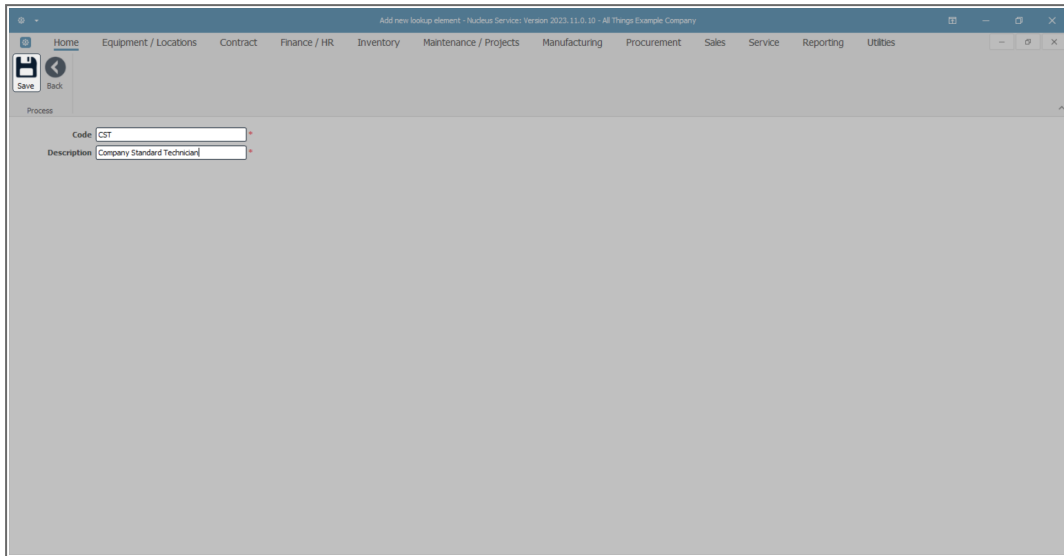
- The **Add new lookup element** screen will open.
- **Code:** Type in a unique code specific to the lookup element you wish to add.
- **Description:** Type in the long, descriptive version of the code above.



Reminder: In this example we are documenting information relevant to a particular part definition: a copier machine. The data added to this screen will therefore be pertinent to the copier industry. However, any data relevant to this module for the specific user and their company can be added here.

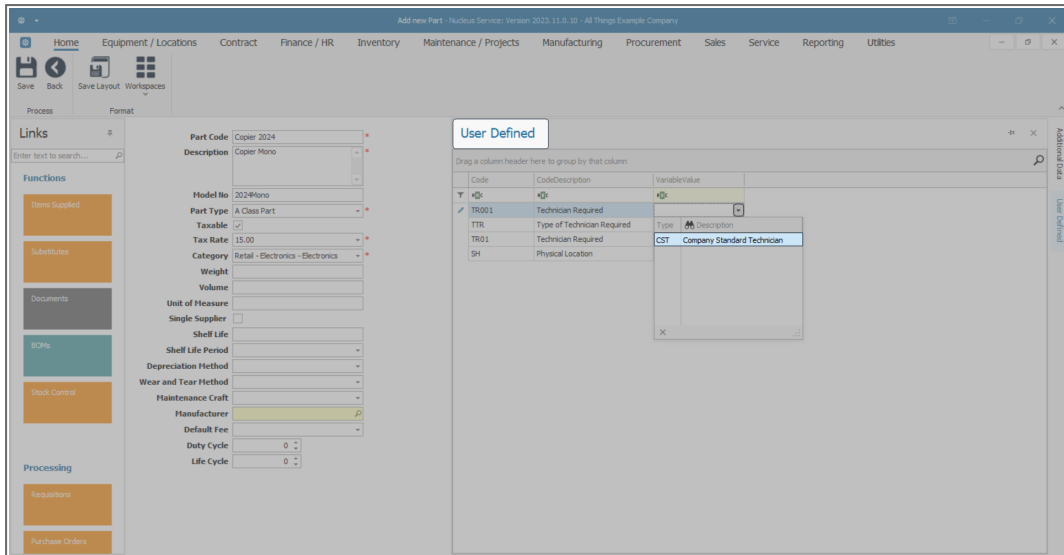
- In this example, the **Code** and **Description** added are relevant to the database of the demonstrating system: **CST - Company Standard Technician**.

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



VIEW ADDED LOOKUP ELEMENTS

- You will return to the **Add new part** screen.
- Click in the **Variable Value** field of the new 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.



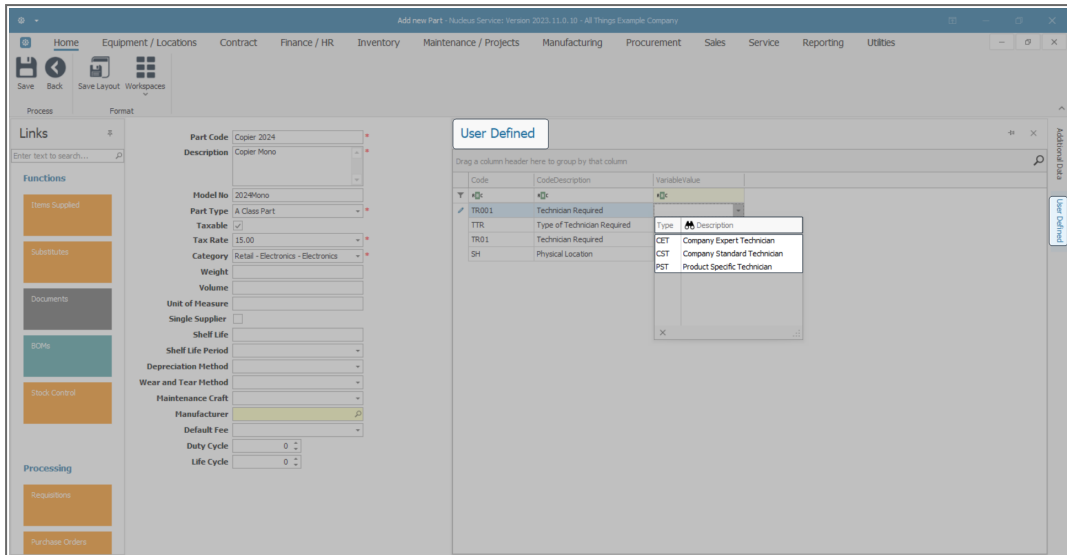
- In this example, a total of **3** lookup elements have been added to the list:
 - **CST: Company Expert Technician**
 - **CET: Company Standard Technician**
 - **PST: Product Specific Technician**

Scenario: The selection made in this lookup **Type** list, would help the part screen monitor decide which type of technician should be assigned for an installation, repair or service.

ADD VARIABLE VALUE

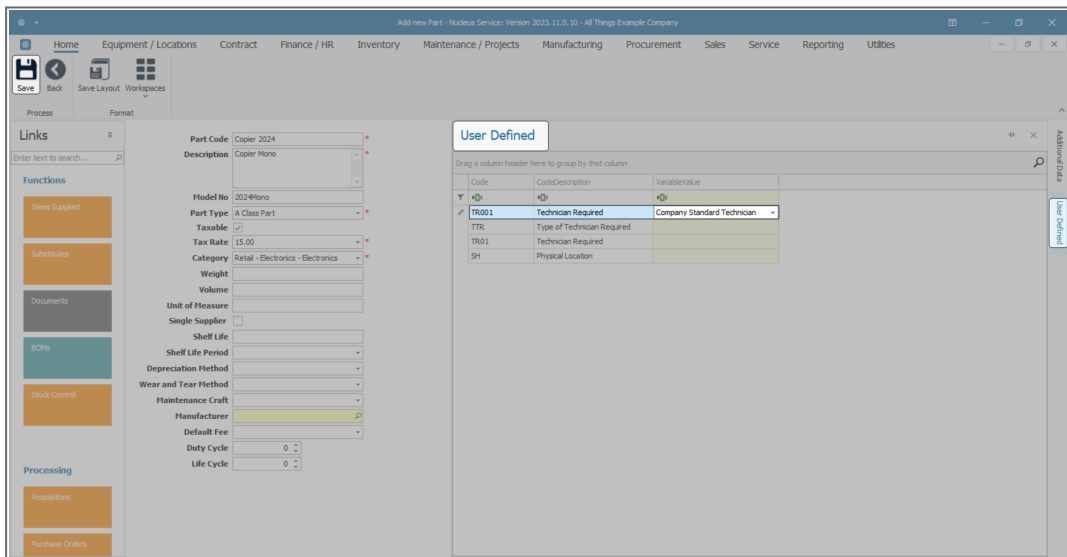
- Click on the required **Type** of technician in the list. In this example, **Product Specific Technician** is selected.

Note: Although the Lookup **Type** list will be available to all part definitions on system, The actual Type selected and added to this **Variable Value** field is unique to the selected part definition and will not reflect in any other part or other module User Defined fields.



SAVE NEW CUSTOM ELEMENT

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



- The new custom element will be saved in the User Defined panel and you will return to the **Part Listing** screen.

- The newly added part definition with the new custom element will be indicated in the screen.

VIEW NEW CUSTOM FIELD NOW LINKED TO ALL PARTS

- Select the row of a different part in the data grid.
- Click on **Edit**.

The screenshot shows the 'Part Listing' window with a data grid. The selected row is for part AS007, a 'Sprint Multi Functional Copier'. The grid columns include PartCode, Description, Status, PartType, CatDescription, Weight, Volume, ModelNo, UnitOfMeasure, ShelfLife, SalesSupplier, Taxable, TaxType, Rate, CraftCode, CraftDesc, and AmendDate. The 'Edit' button in the top toolbar is highlighted.

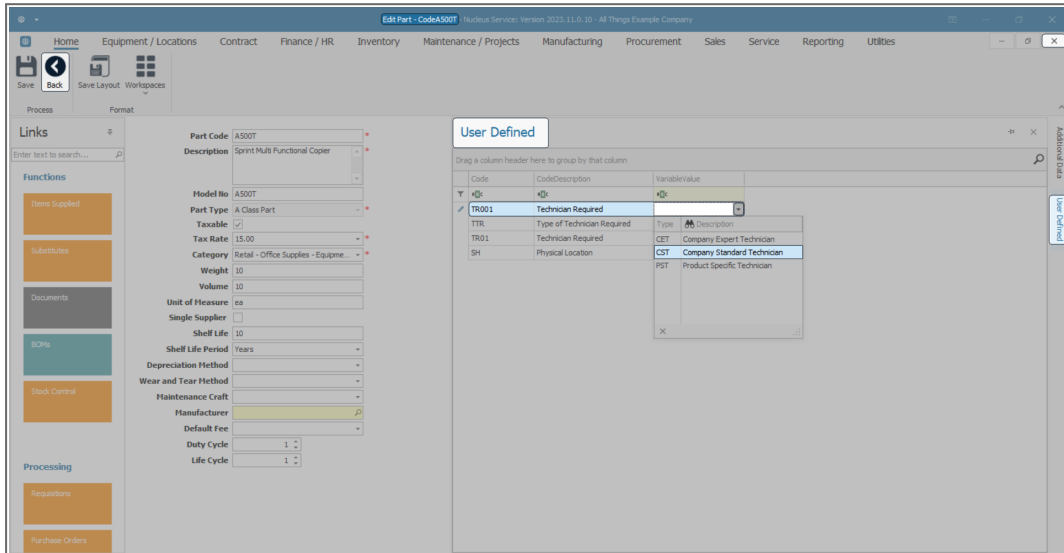
PartCode	Description	Status	PartType	CatDescription	Weight	Volume	ModelNo	UnitOfMeasure	ShelfLife	SalesSupplier	Taxable	TaxType	Rate	CraftCode	CraftDesc	AmendDate
Toner001	Black Toner	A	C	Retail - Office Supplies - Consumables	75	10mm		kg	24.00	Yes	Yes	VAT	15.00	TECHJ	Technica	Jan 1 1900 12:00AM
M500P-6276	Toner Yellow	A	C	Retail - Office Supplies - Consumables			M500L	kg	1.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
AM1-Copier	Copier Multi 1001 Series	A	A	Retail - Office Supplies - Electronics	45	640x	1001-A	kg	3.00	No	Yes	VAT	15.00	TECHG	Technica	Jan 1 1900 12:00AM
SP2020	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	SP2020	ea	10.00	No	Yes	VAT	15.00			Mar 13 2024 5:21PM
SP500	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	SP500	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
A990	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	A990	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
TT5550	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	TT5550	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
A9653	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	A9653	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
MY1405	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	MY1405	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
AS007	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	AS007	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
M500P	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	M500P	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
C8000	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	C8000	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
K3000	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	K3000	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
YY3721	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	YY3721	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
A300	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	A300	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
H14TSP	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	H14TSP	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
F9114	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	F9114	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
MF6000	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	MF6000	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
BP1470	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	BP1470	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
CT3690	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	CT3690	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
D6547	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	D6547	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
ES0258	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	ES0258	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
FW8530	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	FW8530	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
GL6547	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	GL6547	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
EC7336	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	EC7336	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM
F88528	Sprint Multi Functional Copier	A	A	Retail - Office Supplies - Equipment	10	10	F88528	ea	10.00	No	Yes	VAT	15.00			Jan 1 1900 12:00AM

- The **Edit Part - []** screen will open.
- If not already extended, click on the **User Defined** tab to open the panel.
- The custom element added to the previous part is now available to this part as is the **Type** drop-down list.
- Note that the **Variable Value** column is not populated.

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

Note: For more information about [Editing the Part User Defined](#) fields, click on the link.

- Click on **Back** or **Close** the screen to return to the **Part Listing** screen.



Related Topics

- [Add Part Definition Details](#)
- [Add Part Definition Defaults](#)
- [Add Part Definition BOM Allocation](#)
- [Add Part Definition Part Meters](#)
- [Add Part Definition Yield Config](#)
- [Add Part Definition Additional Data](#)

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