

INVENTORY

PARTS – ADD PART DEFINITION USER DEFINED

A **User Defined** panel has been added to the **Part Maintain** screens (the *Add new Part* and *Edit Part* screens).

User defined fields in BPO 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:

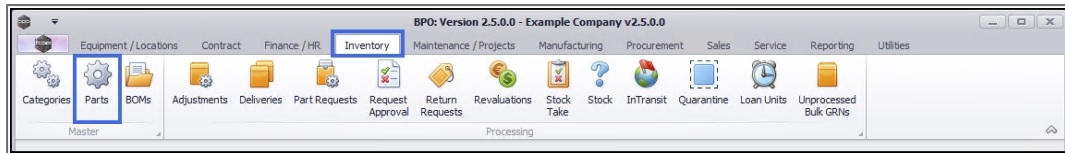
- They cut down the transition time between screens.
- They reduce the amount of screens open in order to find information.

In essence these fields serve as a shortcut, so that users do not have to leave the listing or maintain fields affected.

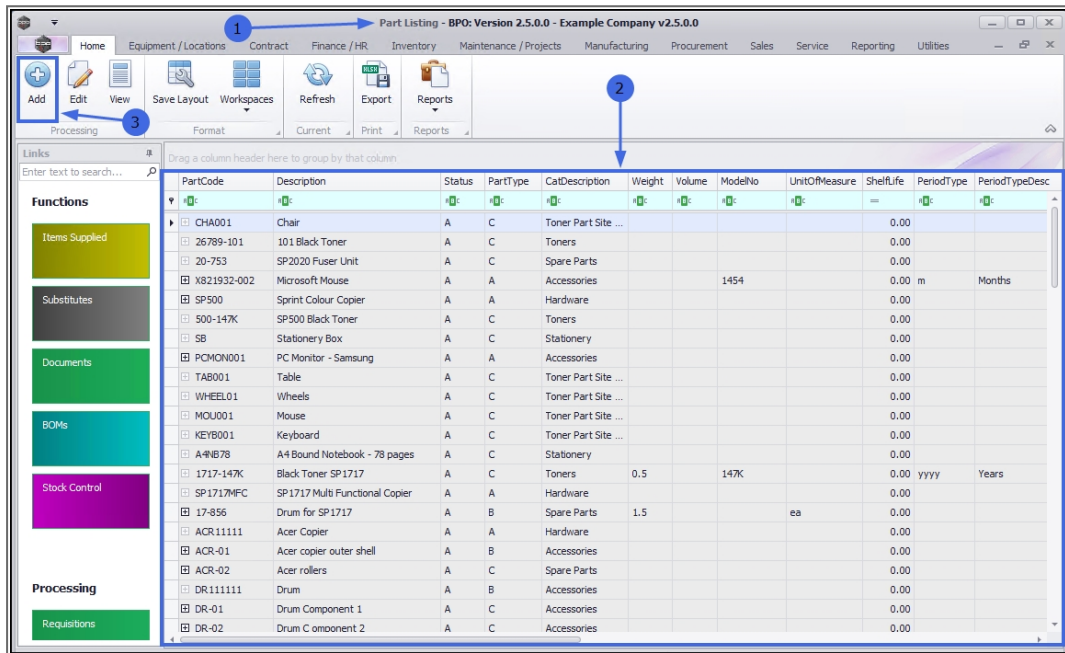
At present, these fields in the **Inventory - Parts** module can be used to add *extra* information relevant to the selected part definition. The added fields will reflect in the User Defined panel in the in the **Add new Part** screen and the **Edit Part** screens across *all* part definitions on the 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.

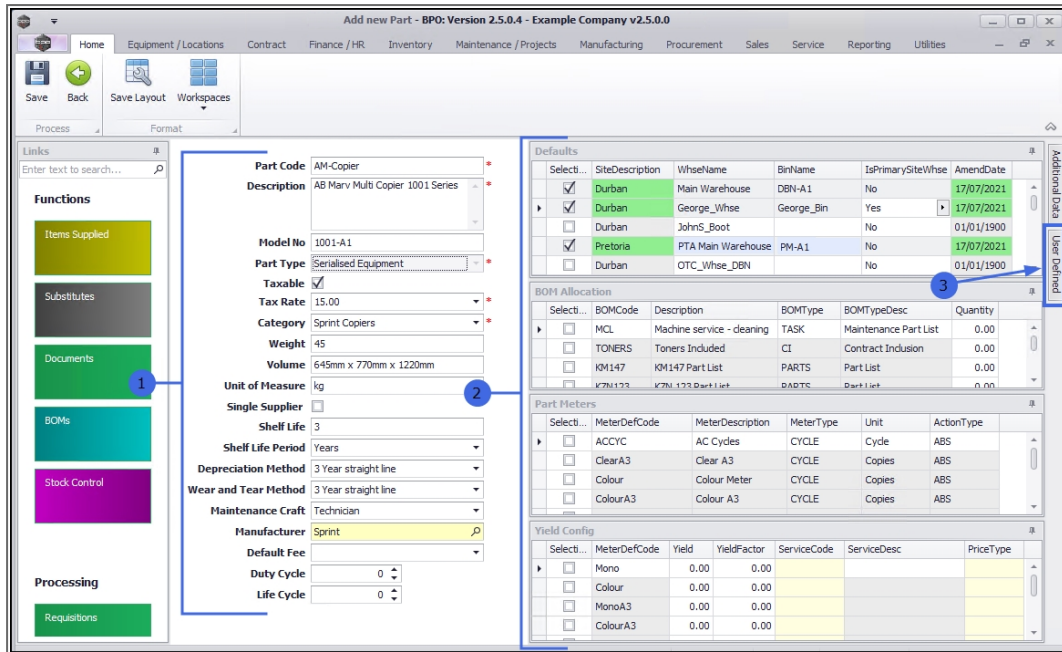
Ribbon Access: *Inventory > Parts*



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



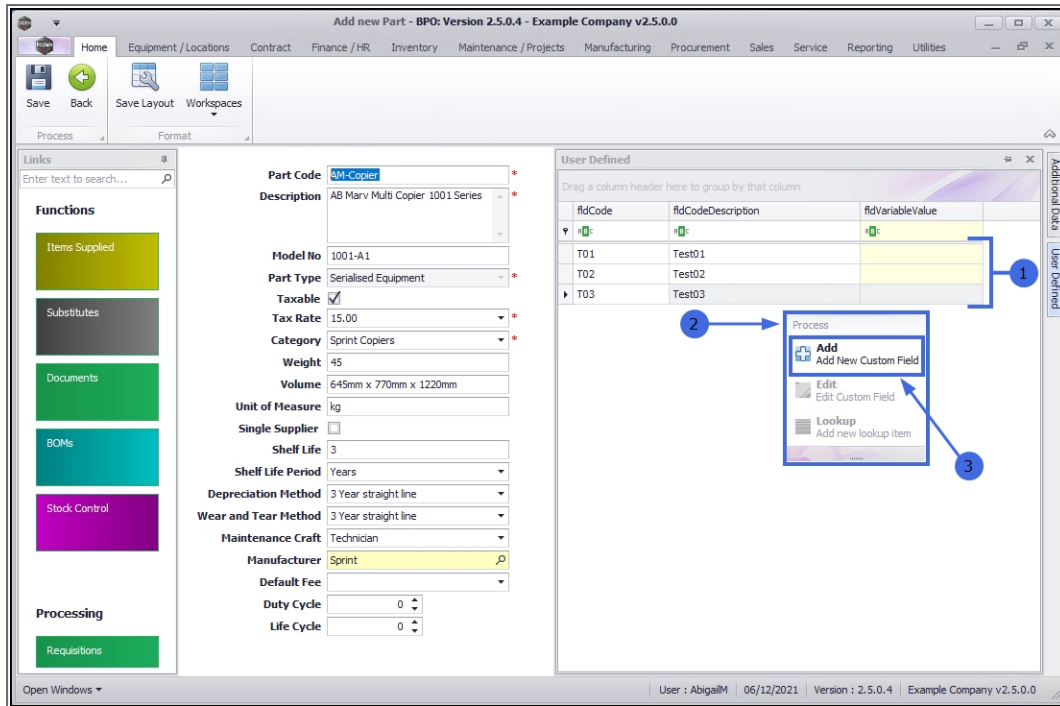
1. The **Add new Part** screen will be displayed.
2. Once the following information has been added to this screen:
 - [Part definition Details](#)
 - [Part definition Defaults](#)
 - [Part definition BOM Allocation](#) (if applicable)
 - [Part definition Part Meters](#) (if applicable)
 - [Part definition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



1. The **User Defined** panel will open.
2. If there is an existing **Code** in the data grid, then a User Defined **custom field** has *already* been added to another part definition in the system.
3. 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.
4. The **Variable Value** is unique. These are set up per specific part definition.

ADD NEW CUSTOM ELEMENT

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

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

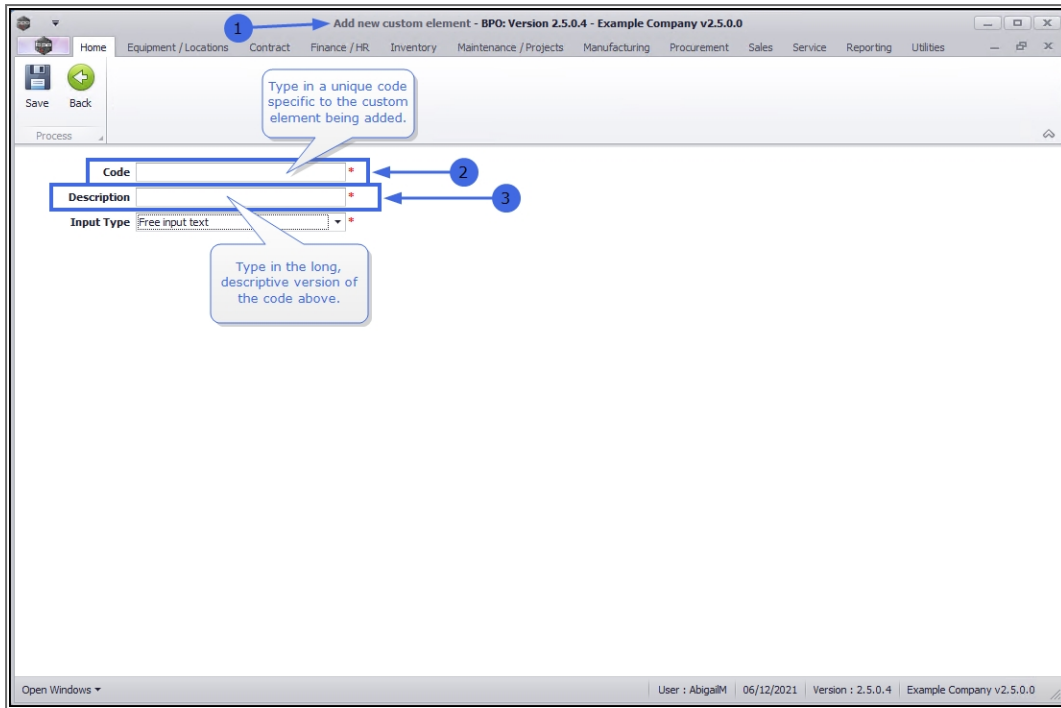


Note: These fields can be populated according to *individual* company requirements. The example given here is pertinent to the system being demonstrated and is not universal.

CODE AND DESCRIPTION

2. **Code:** Type in a *unique* code specific to the custom field you wish to add.
3. **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.



1. Add new custom element - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

2. Type in a unique code specific to the custom element being added.

3. Type in the long, descriptive version of the code above.

Code

Description

Input Type: Free input text

User : AbigailM | 06/12/2021 | Version : 2.5.0.4 | Example Company v2.5.0.0

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.

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

INPUT TYPE

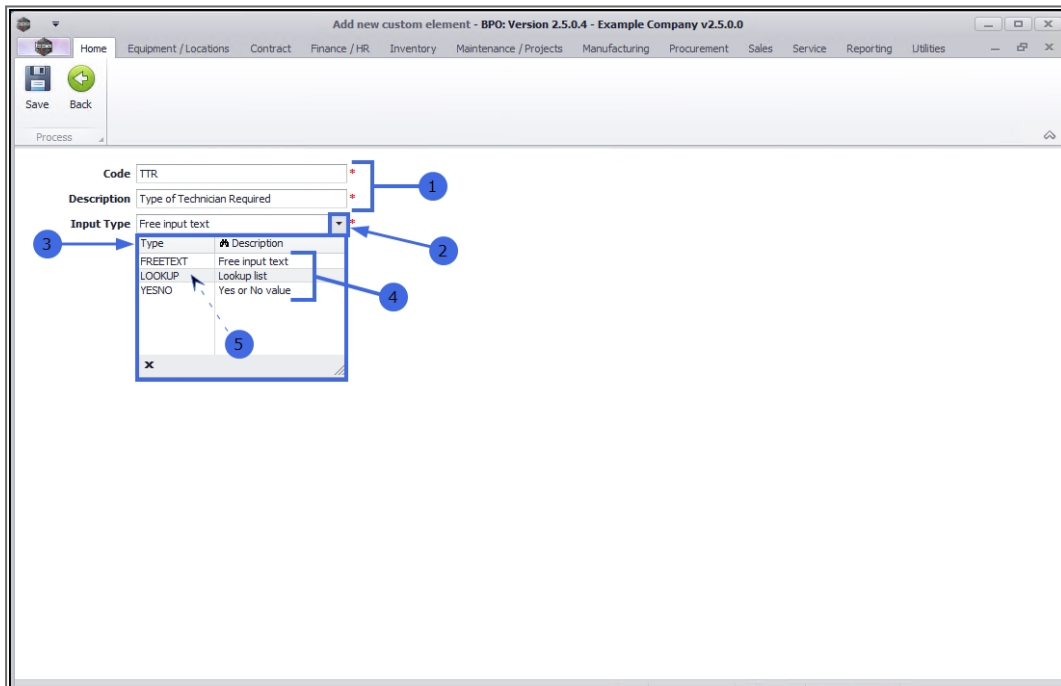
2. Click on the drop-down arrow in the **Input Type** field.
3. A **Type** menu will display.
4. The options are :
 - **FREETEXT - Free Input Text**: you can type data directly into the text box.

- **LOOKUP** - *Lookup list*: you can select the desired value from the list.
- **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.

5. In this example, the **LOOKUP** list selection seems the most congruous for the following reasons:

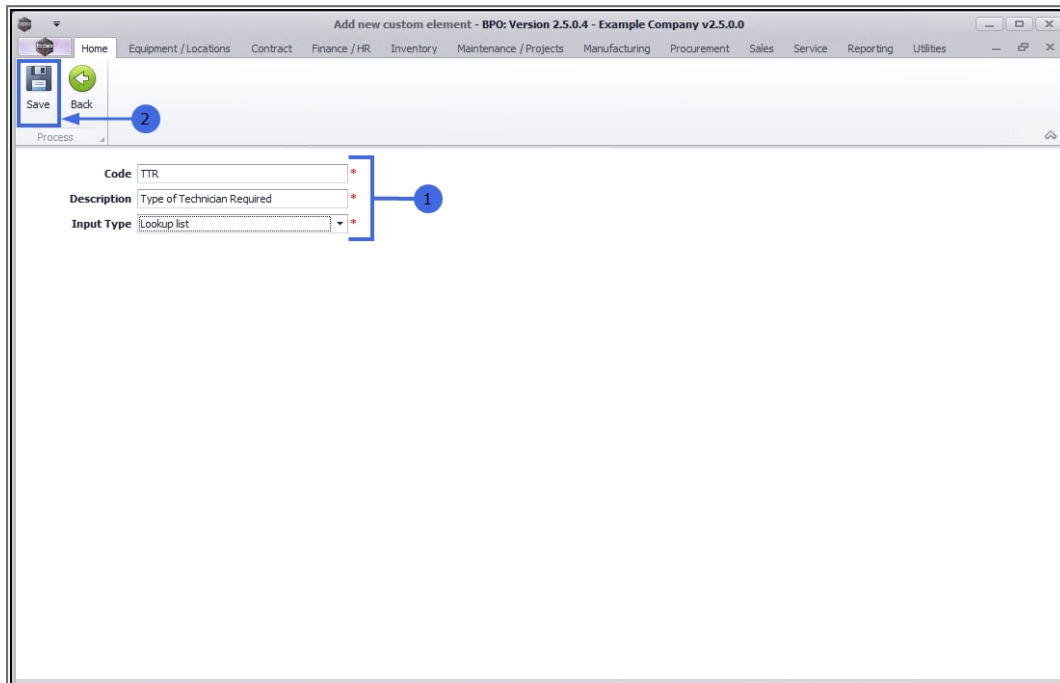
- **YESNO** does not give the right parameters needed for the user to select what *type* of technician is required to install and / or service this part.
- The **FREETEXT** selection could be used, but a lookup list would give a more restricted selection which in this case would help prevent the potential of human error.



The screenshot shows the 'Add new custom element' window. The 'Code' field contains 'TTR'. The 'Description' field contains 'Type of Technician Required'. The 'Input Type' dropdown is open, showing a list of options: FREETEXT, LOOKUP, and YESNO. A blue box highlights the 'LOOKUP' option, and a blue arrow points to it from the number 5. Other blue arrows point to the 'Code' field (1), the 'Description' field (2), the 'Input Type' dropdown (3), and the 'LOOKUP' option (4).

SAVE NEW CUSTOM ELEMENT

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

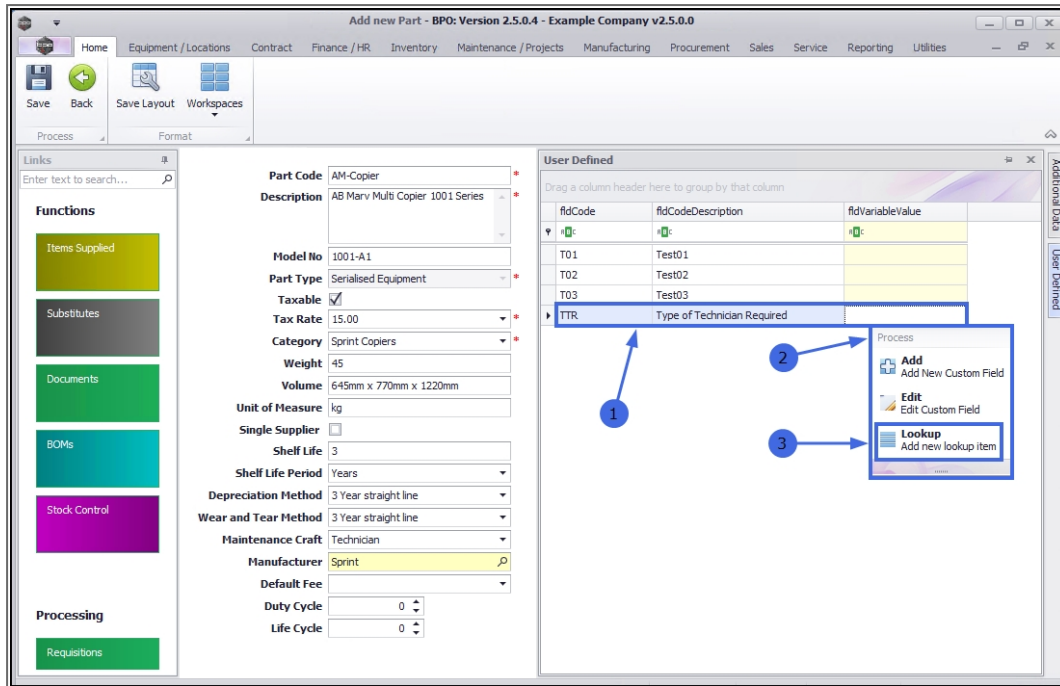


1. You will return to the **New Equipment** screen.
2. The newly created custom element will be added to the panel.

ADD LOOKUP FIELDS TO THE CUSTOM ELEMENT

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

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



Part Code AM-Copier *

Description AB Marv Multi Copier 1001 Series *

Model No 1001-A1

Part Type Serialised Equipment *

Taxable ☒

Tax Rate 15.00 *

Category Sprint Copiers *

Weight 45

Volume 645mm x 770mm x 1220mm

Unit of Measure kg

Single Supplier ☐

Shelf Life 3

Shelf Life Period Years

Depreciation Method 3 Year straight line

Wear and Tear Method 3 Year straight line

Maintenance Craft Technician

Manufacturer Sprint

Default Fee

Duty Cycle 0

Life Cycle 0

fidCode	fidCodeDescription	fidVariableValue
T01	Test01	
T02	Test02	
T03	Test03	
TTR	Type of Technician Required	

User Defined

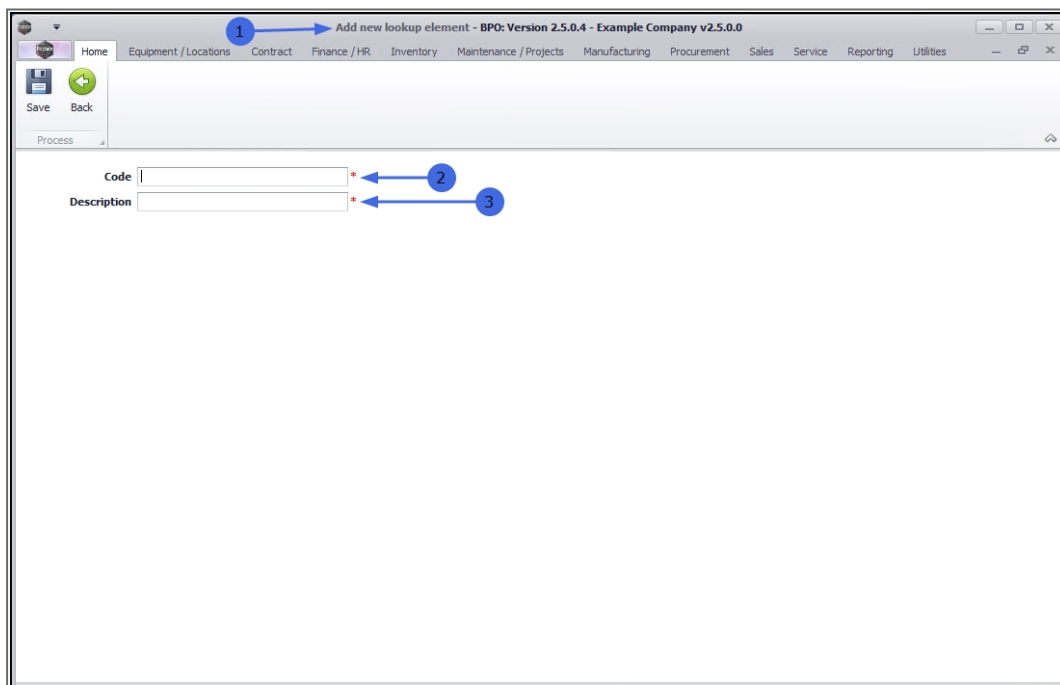
Drag a column header here to group by that column

1. Add New Custom Field

2. Edit Custom Field

3. Lookup Add new lookup item

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



Code

Description

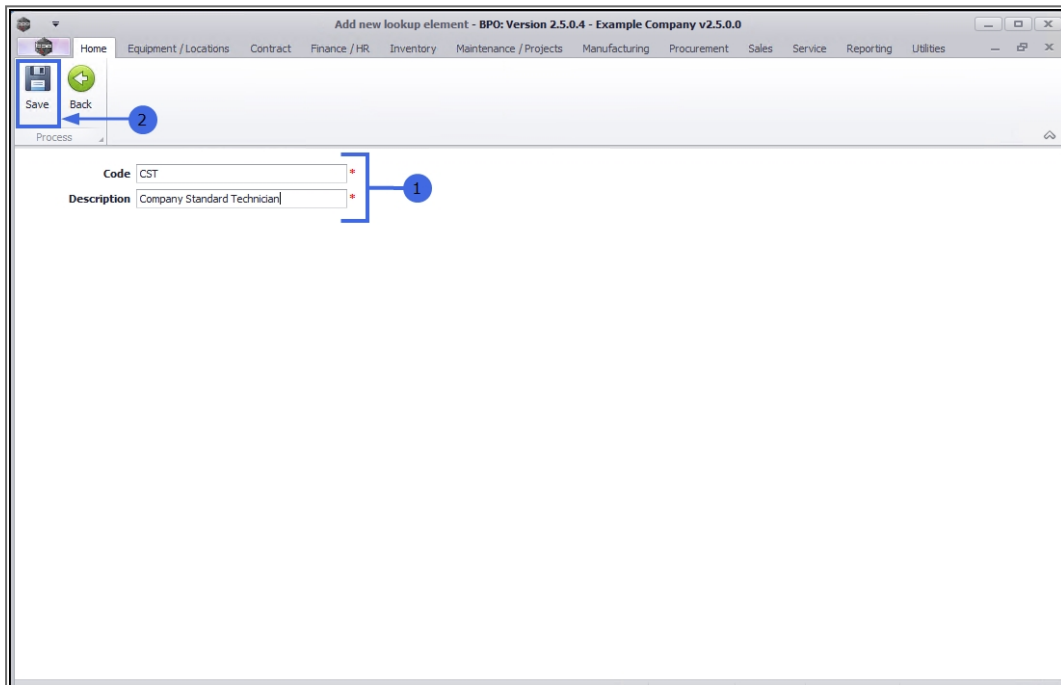
1. Add new lookup element - BPO: Version 2.5.0.4 - Example Company v2.5.0.0

2. Add new lookup element

3. Add new lookup element

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.

1. In this example, the **Code** and **Description** added are relevant to the database of the demonstrating system: **CST - Company Standard Technician**.
2. When you have finished adding the information to these fields, click on **Save**.

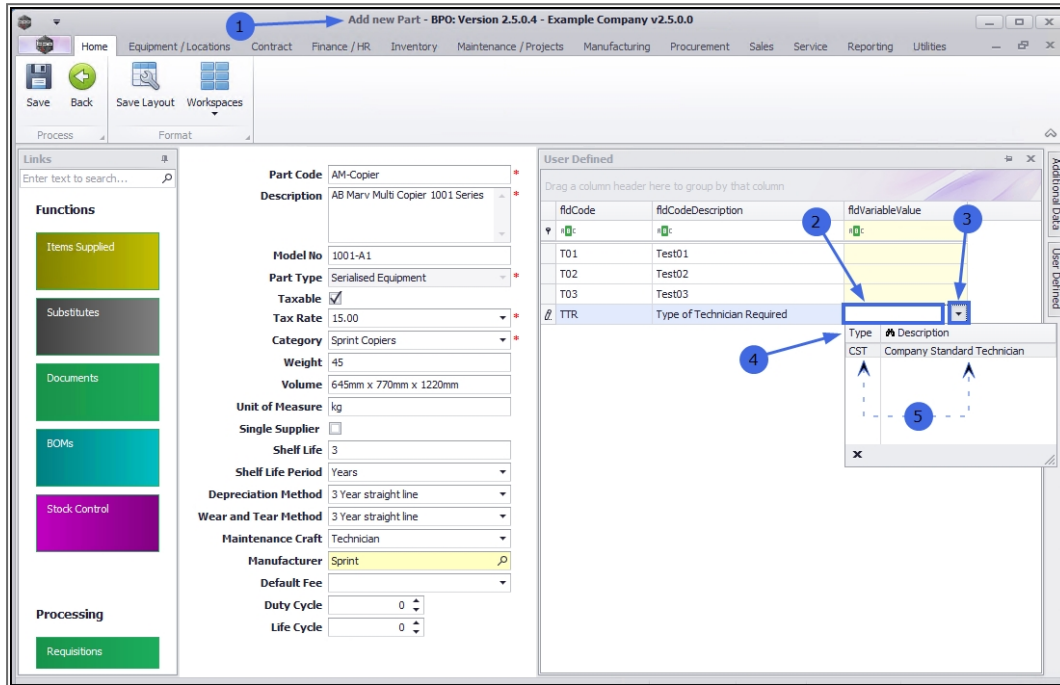


VIEW ADDED LOOKUP ELEMENTS

1. You will return to the **Add new part** screen.
2. Click in the **Variable Value** field of the new custom element row.
3. A **drop-down arrow** will appear. Click on this arrow.

4. A **Type** menu will display.
5. The newly added **Lookup List element** will be available in the list.

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



1. In this example, a total of **3** lookup elements have been added to the list:

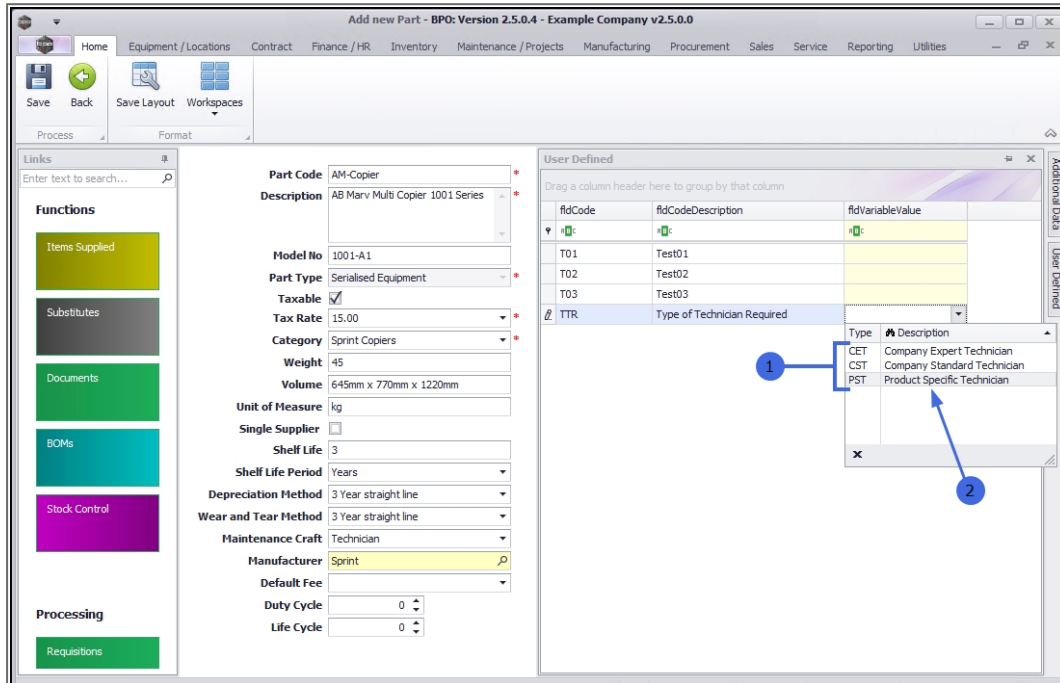
- **CST: Company Expert Technician**
- **CET: Company Standard Technician**
- **PST: Product Specific Technician**

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

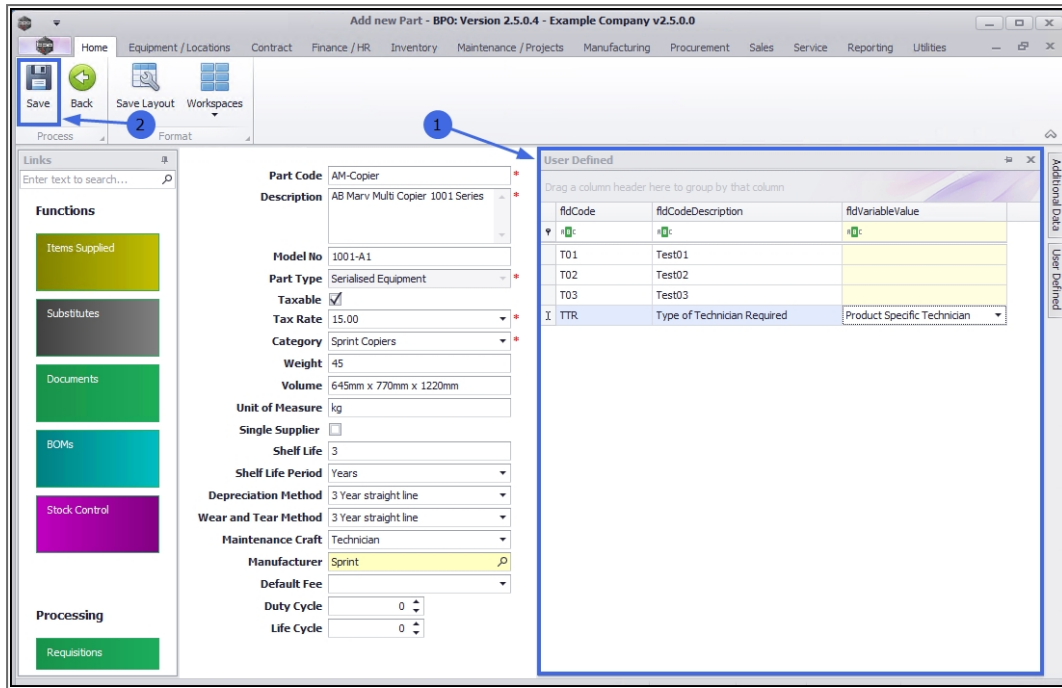
2. Click on the required **Type** of technician in the list. In this example, **Product Specific Technician** is selected.

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

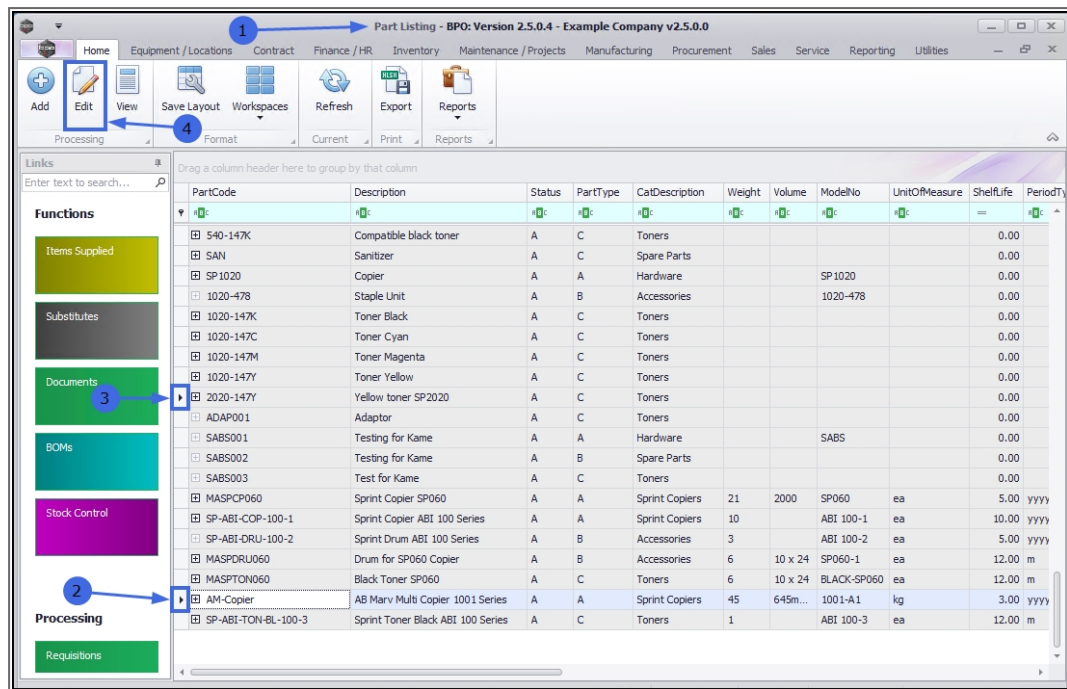
1. When you have finished adding the information to the User Defined fields,
2. Click on **Save**.



1. The new custom element will be saved in the *User Defined* panel and you will return to the **Part Listing** screen.
2. 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

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

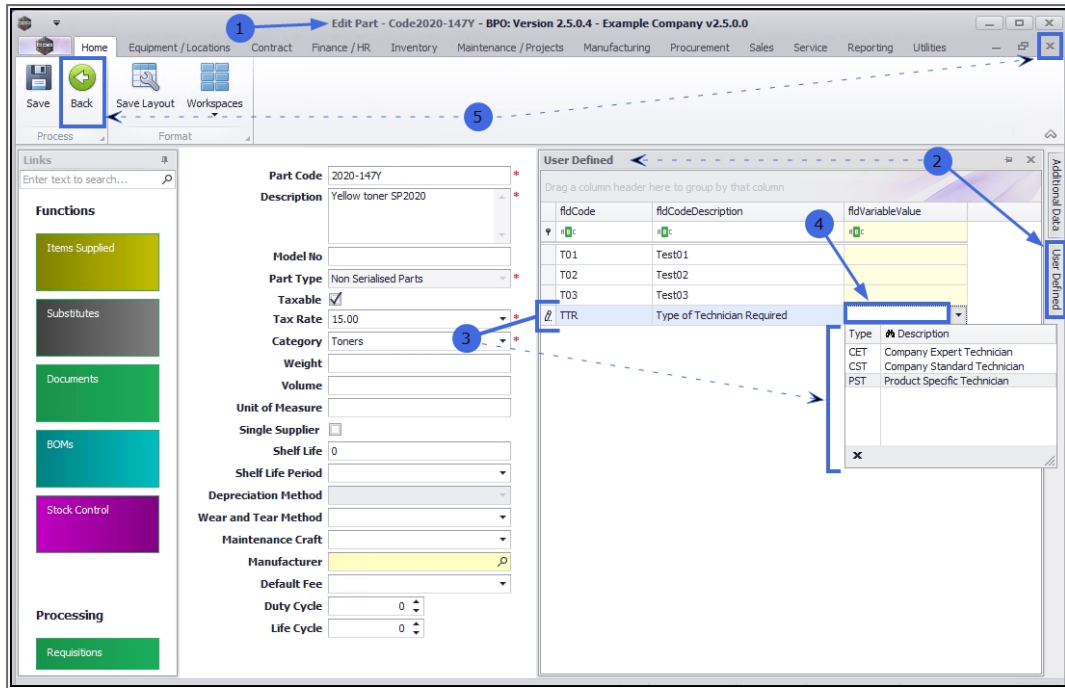


1. The **Edit Part - []** screen will open.
2. If not already extended, click on the **User Defined tab** to open the panel.
3. The custom element added to the *previous part* is now available to this part as is the **Type** drop-down list.
4. Note that the **Variable Value** column is not populated.

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 panel fields, click on the link.

5. 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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