Add Custom Equipment Fields

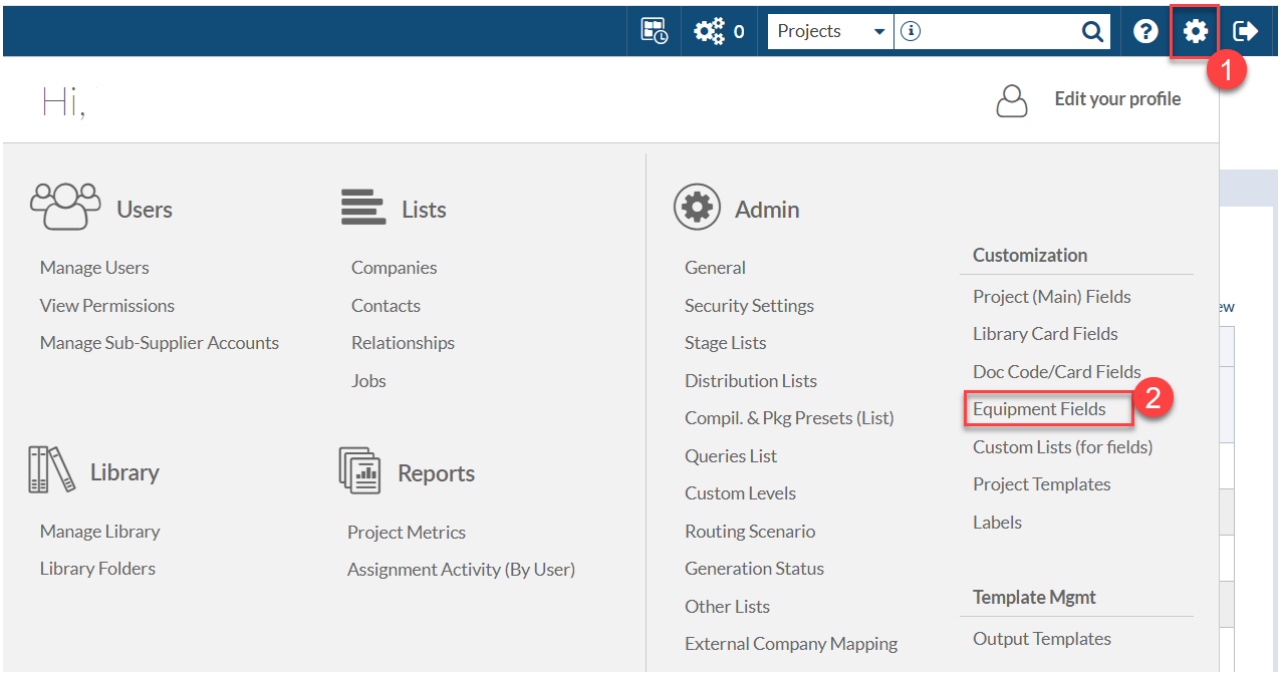
04/03/2025 11:15 am MDT

You may now add an unlimited number of global and project specific equipment fields.

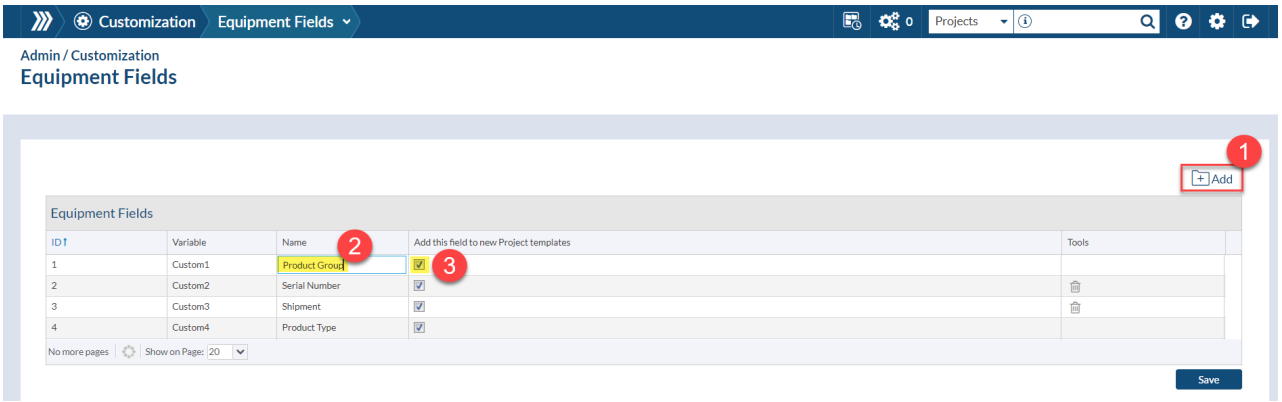
Global Equipment Fields

When you set up global equipment fields they can be used in all your projects. The variables will remain constant, so you can create standardized templates which rely on these values.

To manage global fields: Navigate to Settings (Gear) > Customization > Equipment fields.



Here you can:



1 – Add as many custom columns as you need by clicking the Add button

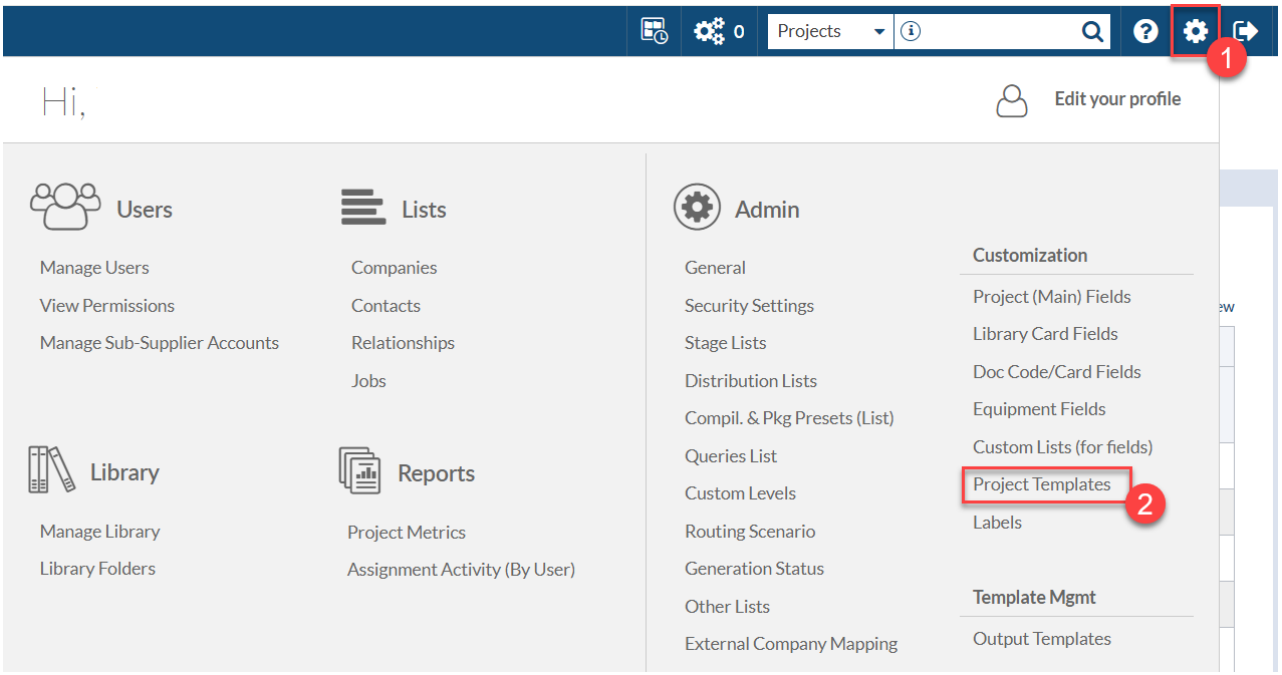
2 - Change the name of the existent custom fields (i.e. Product Group in Custom1)

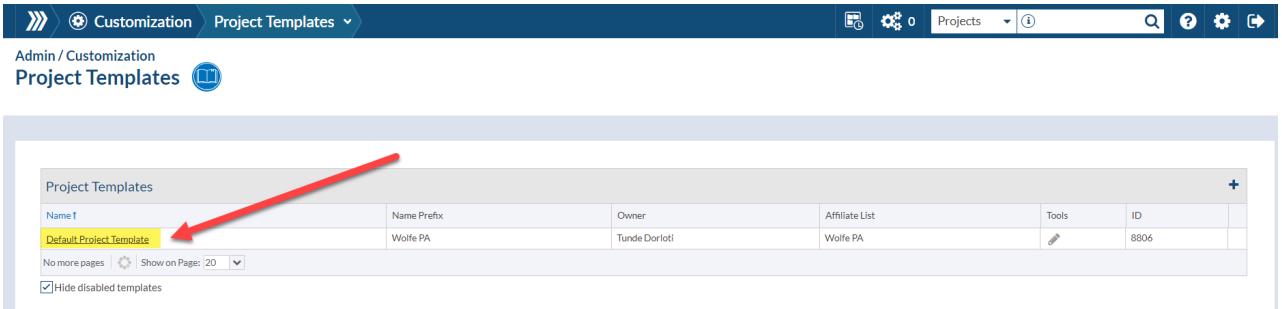
3 - Select to automatically add any custom field to all new project field templates

Once the equipment fields have been created, these have to be enabled in the Project Template.

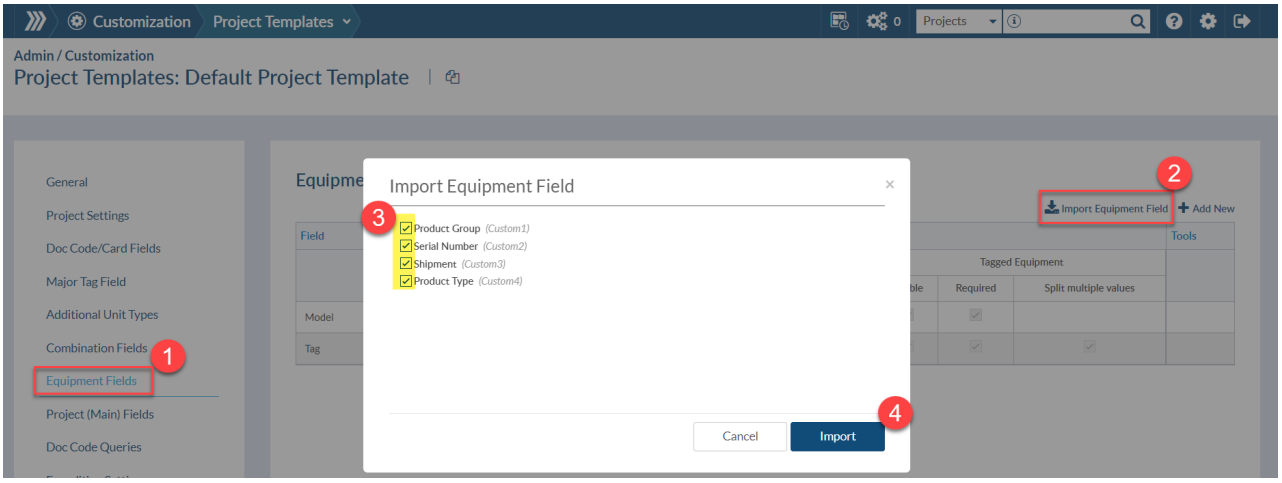
Enabling the Equipment Fields for New Projects

To enable the fields for **NEW** Projects only, navigate to Navigate to Settings (Gear) > Customization > Project Templates and click on your Project Template.

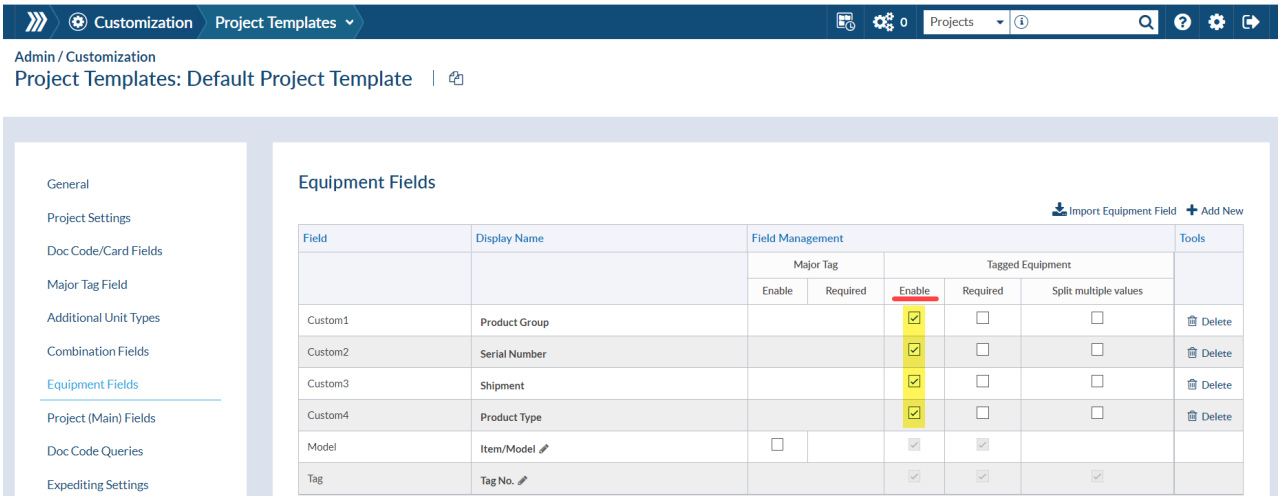




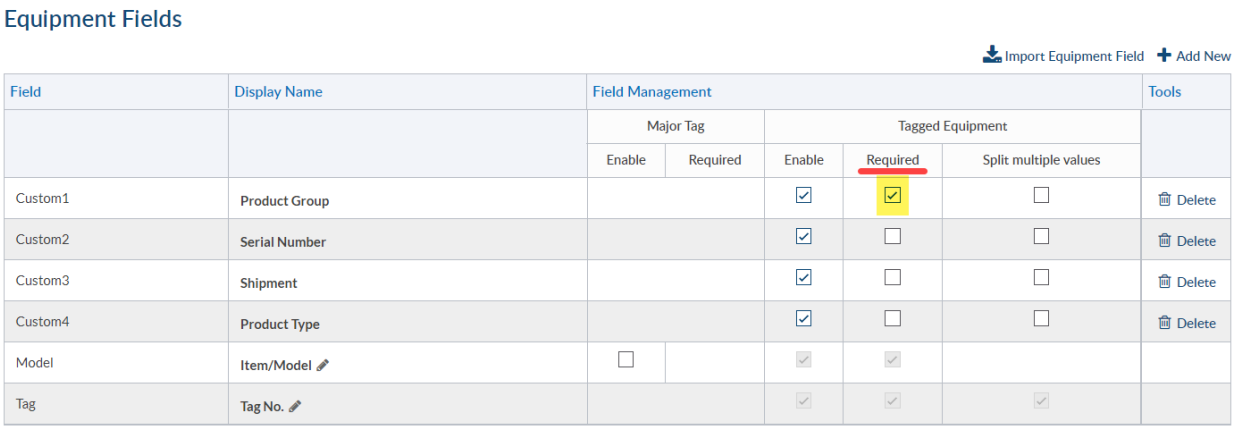
Here navigate to Equipment Fields section > click on Import Equipment Field > select the custom fields you wish to add and click on Import.



Once the custom fields are added to the grid they should be Enabled.



Optionally there is also the option to set them as requested and make the field mandatory when adding the equipment units.



And also enable Split Multiple Values when using Multiple Quantity Upload option.

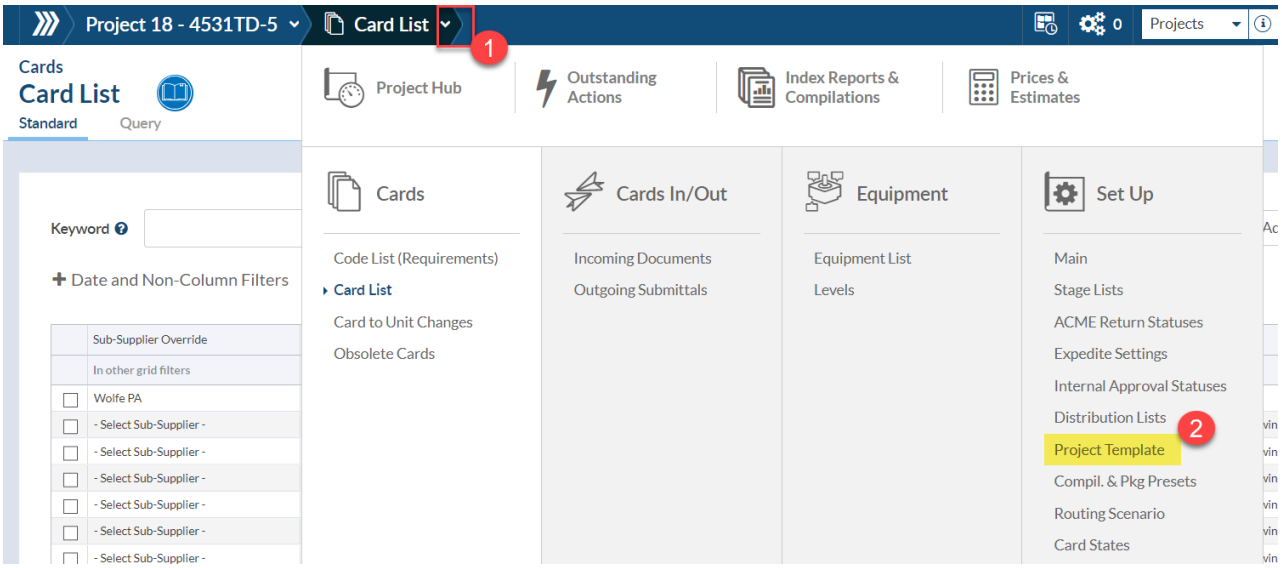
Equipment Fields

Import Equipment Field Add New

Field	Display Name	Field Management					Tools
		Major Tag		Tagged Equipment			
		Enable	Required	Enable	Required	Split multiple values	
Custom1	Product Group			☑	☑	☑	Delete
Custom2	Serial Number			☑	☐	☐	Delete
Custom3	Shipment			☑	☐	☐	Delete
Custom4	Product Type			☑	☐	☐	Delete
Model	Item/Model	☐		☑	☑		
Tag	Tag No.			☑	☑	☑	

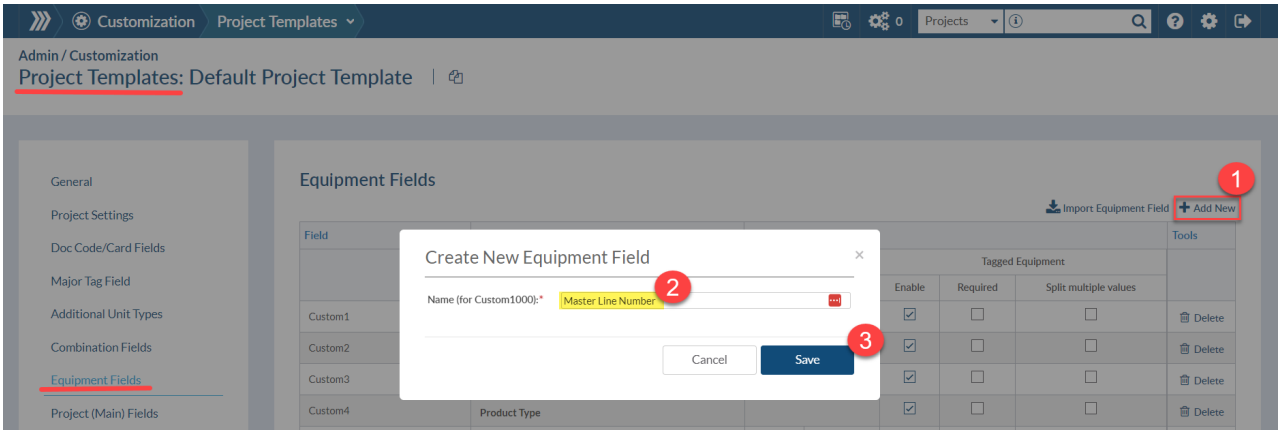
Enabling the Equipment Fields for Existing Projects

To enable the fields on **EXISTING** Projects, navigate to your Project > click on the Project Menu > Project Templates.



From here, follow the steps outlined above to import and enable (and optionally set as required and split multiple values if needed).

Add an Equipment Field directly to the Project Template (project-only fields).

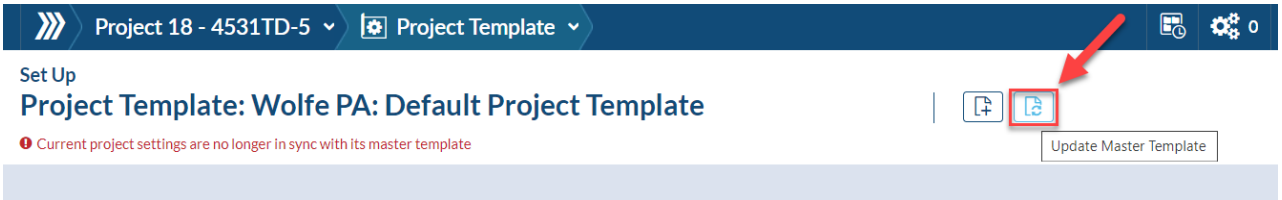


If the equipment fields have **not** been added at the global level, and you know that they will **not** need to be reused in the future, you can create new, project-specific equipment fields.

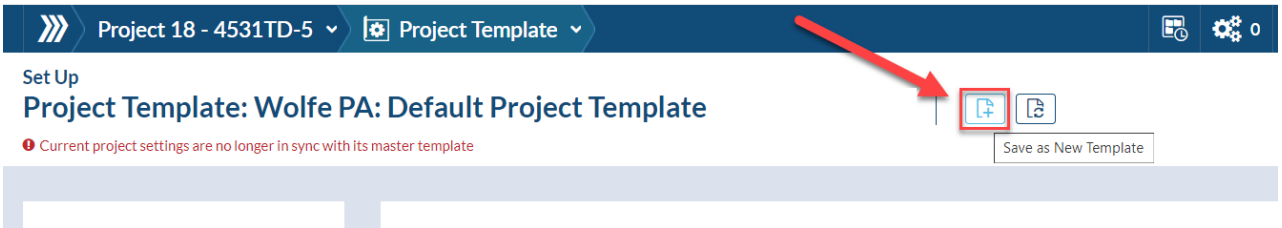
The ID of the equipment fields added directly to the Project Template project equipment field starts at Custom1000. This will help you to difference between Global Equipment Fields and specific Project Equipment Fields.

> To avoid duplication, ensure that the equipment fields are **not** available at the global level. To do this, click the import button and check if they are listed as fields that have not yet been imported.

When there are changes applied to the Project Templates in the Project Menu, there is also the possibility to save back to Admin Project Template:



Or even save as a new Admin Project Template which can be re-used on future Projects.



Where do I enter the values?

Equipment List - is where you can enter/edit the values

Tagged Equipment Units

Select	Wolfe PA Line N...	Item/Model	Tag Number	Sub-Supplier	Product Group	Type
	1	Blind	8244	Sub-Supplier 1	Y	Stainless Steel
	2	Blind	7036	Sub-Supplier 1	Y	Stainless Steel
	3	Blind	3328	Sub-Supplier 1	Y	Stainless Steel
	4	Blind	1576	Sub-Supplier 1	Y	Stainless Steel
	5	Blind	8109	Sub-Supplier 1	Y	Stainless Steel
	6	Blind	7039	Sub-Supplier 1	Y	Stainless Steel
	7	Blind	8248	Sub-Supplier 1	Y	Stainless Steel
	243	Paddle blank & spacer	8403	Sub-Supplier 1	X	Cast Material
	244	Paddle blank & spacer	1900	Sub-Supplier 1	X	Cast Material

How are they linked to my cards?

If you look at the card list - you will see the list of custom values related to the card. It shows the unique values from all linked equipment.

Card List

	Required	Doc Code	Title	Chiyod Doc #	Type List	Product Group List
	☑	MRB	Manufacturing Record Book	Document Number to be provided by Com	Stainless Steel	X, Y
	☑	BOM	Bill of Material	P7564-PO018-400-30-BOM-0010	Stainless Steel	X, Y
	☑	DMD	Dimensional Drawing	P7564-PO018-400-30-DWG-0001		X
	☑	DMD	Dimensional Drawing	P7564-PO018-400-30-DWG-0002	Stainless Steel	Y
	☑	ITP	Inspection and Test Plan	P7564-PO018-400-30-ITP-0001	Stainless Steel	X, Y
	☑	MRBI	Manufacturing Record Book Index	P7564-PO018-400-30-MRBI-0009	Stainless Steel	X, Y

In each case, these fields can be put onto templates using the variables based on their ID's: i.e. CustomX and CustomX_List