Add Custom Equipment Fields

09/28/2026 9:53 am MDT

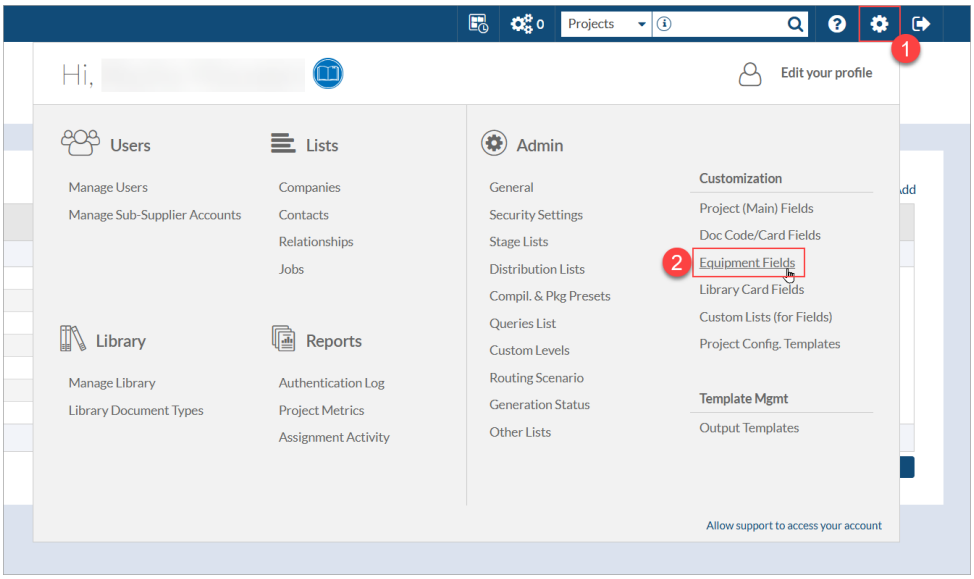
You can add custom fields to your equipment list. Here's how to create and manage them.

Create

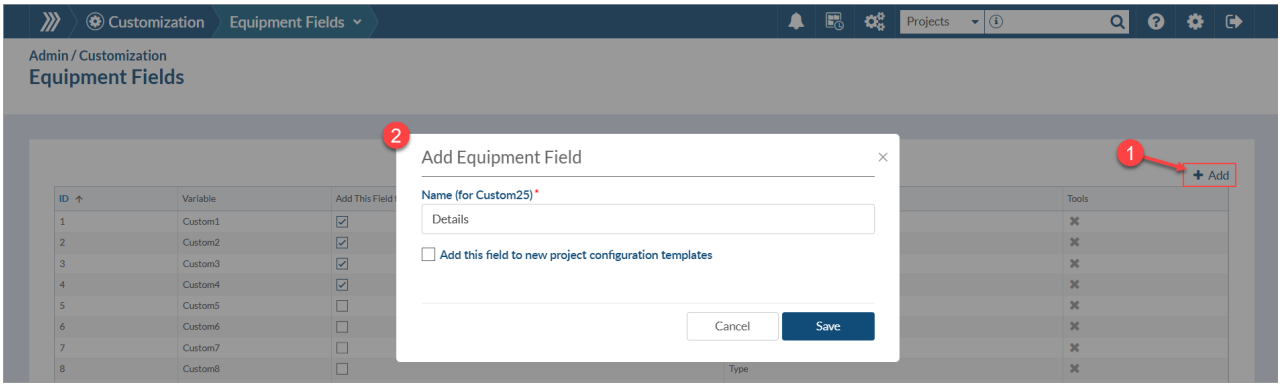
Global fields

The initial set up of custom equipment fields (at the global level) must be done by an**Admin** User. Once created, they can be enabled or disabled on any project. Global equipment fields they can be used on any project.

To create a custom equipment field for global use, navigate to **Admin > Customization > Equipment Fields.**



On the page, any existing fields will appear. To add a new field, click the "+ Add" button above the grid (top right). From the pop-up, give the new field a name and adjust the options as needed.



- **Add this field to new project configuration templates:** Will automatically import the field into new project configuration templates . To enable the field, see the instructions below.

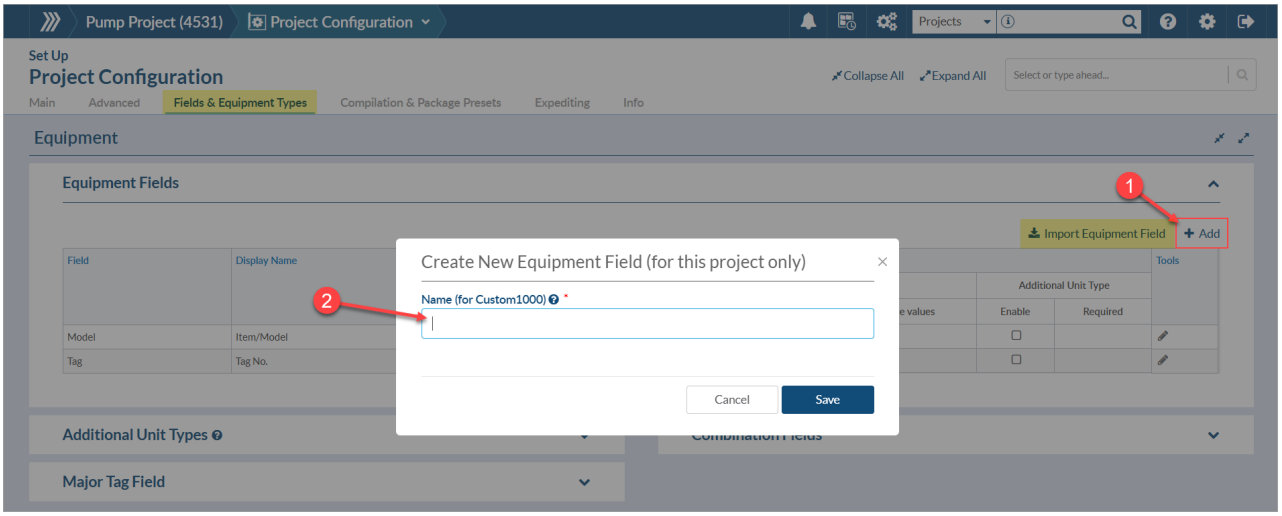
Note: Once a field is created, the field name can be modified from the grid. In addition, any existing field can be deleted. If a deleted field was used on a project, the field (and it's data) will be maintained (deleting the field will

simply prevent it from being used on future projects).

Project-specific fields

If you need a very specific field for a particular project (and know that it will **not** need to be reused in the future), you can create a custom equipment field directly on a project. To do this, navigate to **Project Menu > Set Up > Project Configuration > Fields & Equipment Types**. Expand the "Equipment Fields" section, and click "+ Add".

*Recommendation: Before creating a project-specific field, first ensure that the equipment fields you need is **not** available at the global level. To do this, click the "Import Equipment Fields" button and check if the field is available to be imported.*



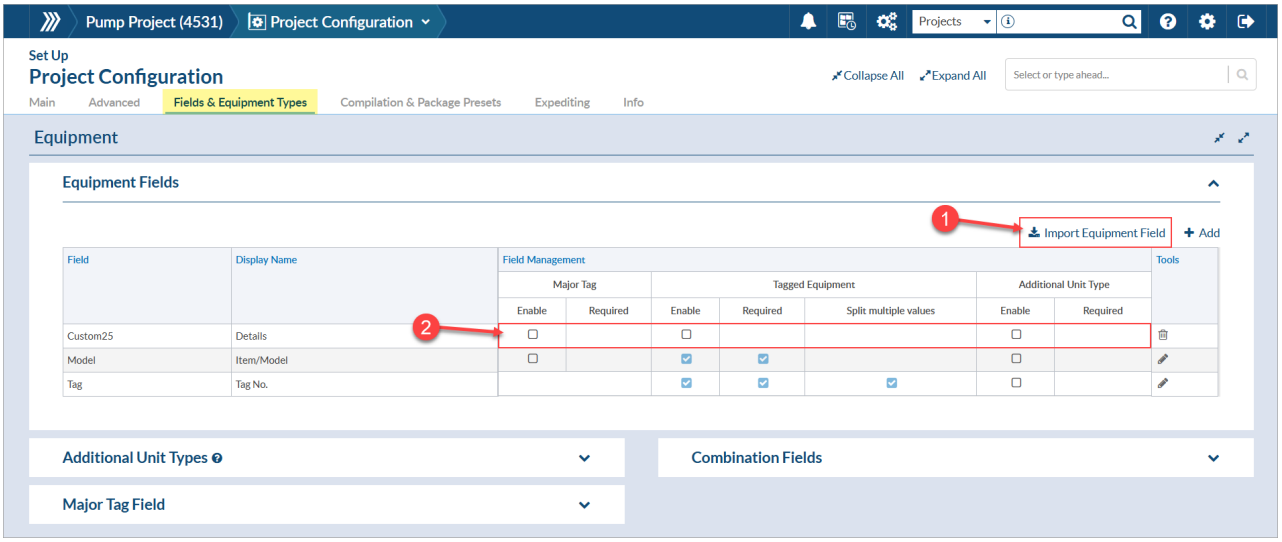
The ID of the project-specific equipment field starts at Custom1000. This will help you to difference between Global Equipment Fields and specific Project Equipment Fields.

Enable on project

Once the field has been created, you must enable it on the project. To do this, navigate to **Project Menu > Set Up > Project Configuration**. Open the "Fields & Equipment Types" tab and expand the "Equipment Fields" section.

Step 1 (global fields only) - Click the "Import Project Main Fields" option, choose the field to import, and click "Add."

Step 2 (global/project-specific fields) - Enable the field by checking the box under the appropriate equipment section (Tagged Equipment, or Major Tag/Additional Unit Type (if applicable)).



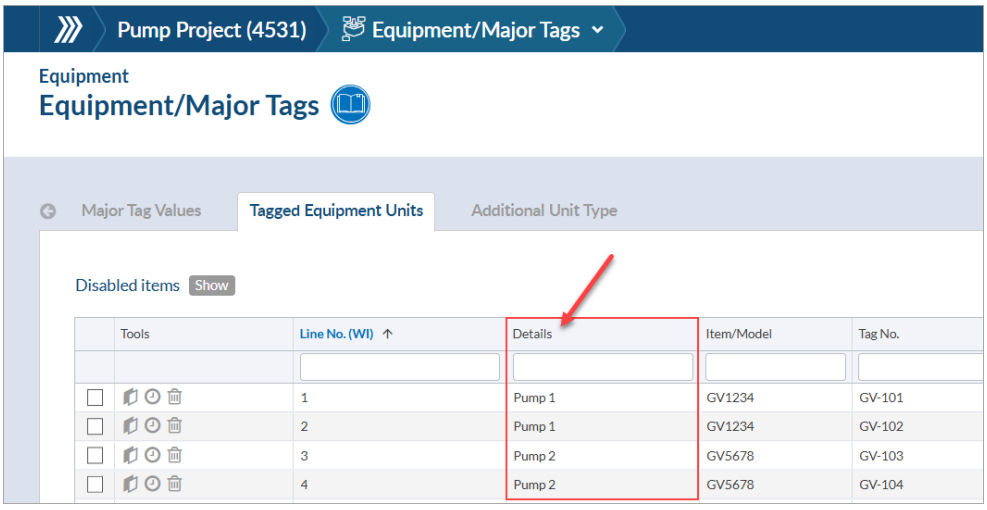
Global custom equipment fields can be imported/enabled on future projects by default by adding them to your existing project configuration template(s) - see article: Project Configuration Templates.

Using the field

With the "Details" custom field enabled, let's see where you would find it on your project...

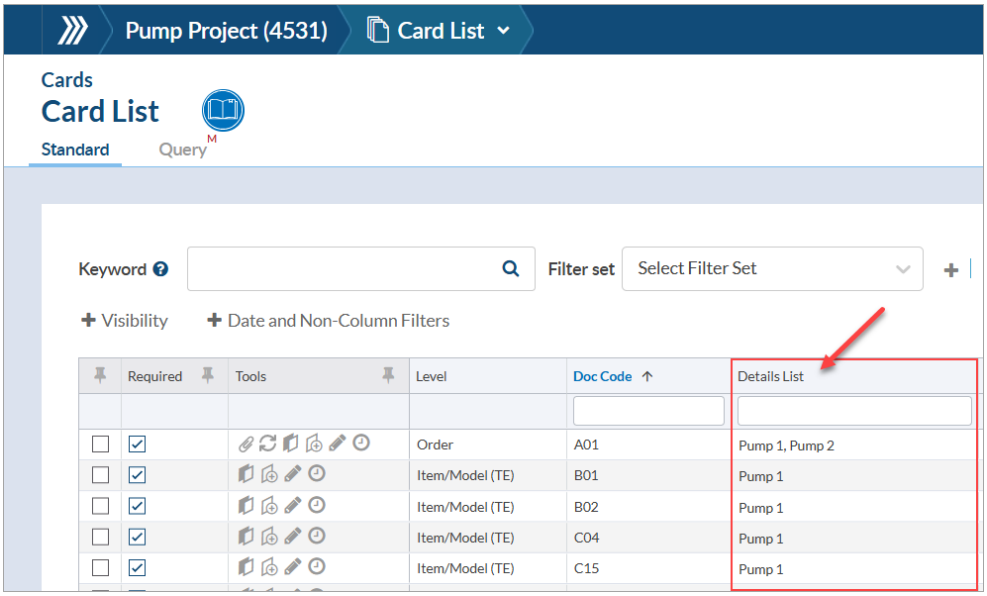
Equipment List

The values are entered/edited on the equipment list.



Card List

The value(s) associated with each card will show in the card list automatically based on the linked units. If the card is associated with more than one value, each value will appear (separated by commas).


Pump Project (4531)
Card List
Cards
Card List
Standard
Query
Keyword
Filter set
Select Filter Set
+ Visibility
+ Date and Non-Column Filters
Required
Tools
Level
Doc Code
Details List
Order
A01
Pump 1, Pump 2
Item/Model (TE)
B01
Pump 1
Item/Model (TE)
B02
Pump 1
Item/Model (TE)
C04
Pump 1
Item/Model (TE)
C15
Pump 1