

# Add Custom Equipment Fields

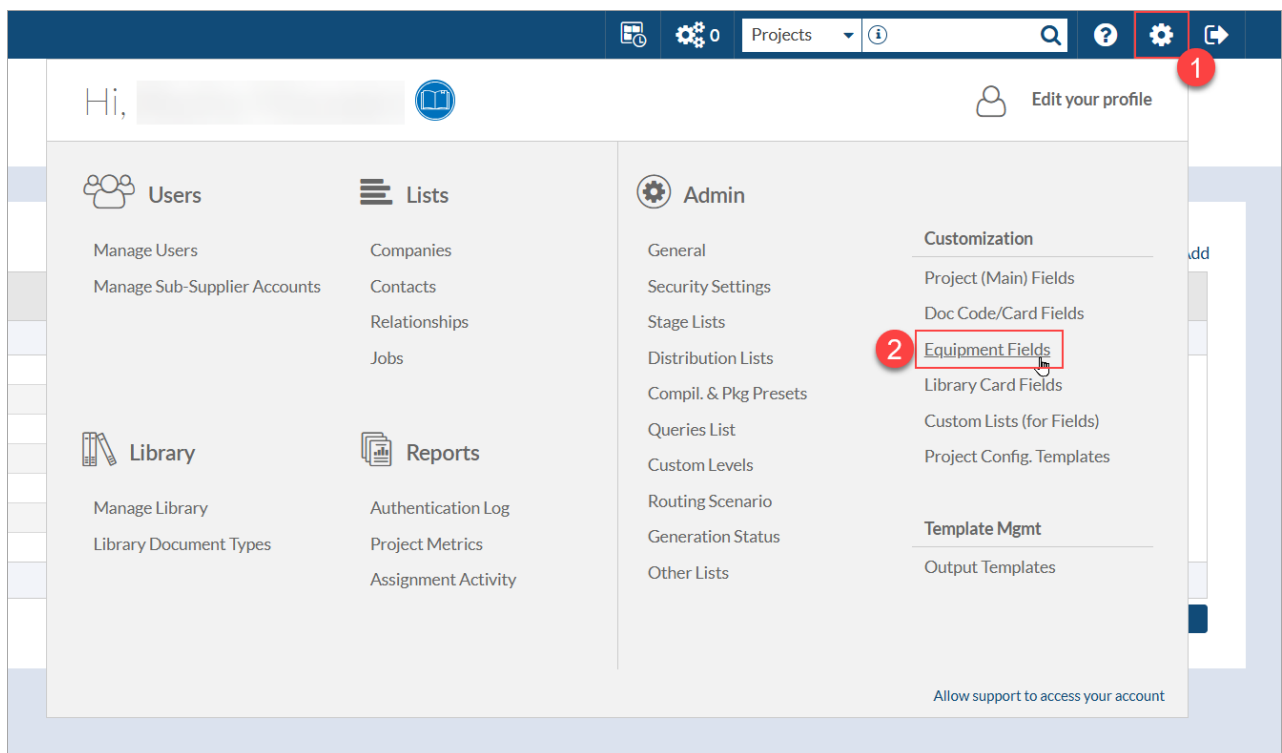
10/01/2025 10:46 am MDT

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

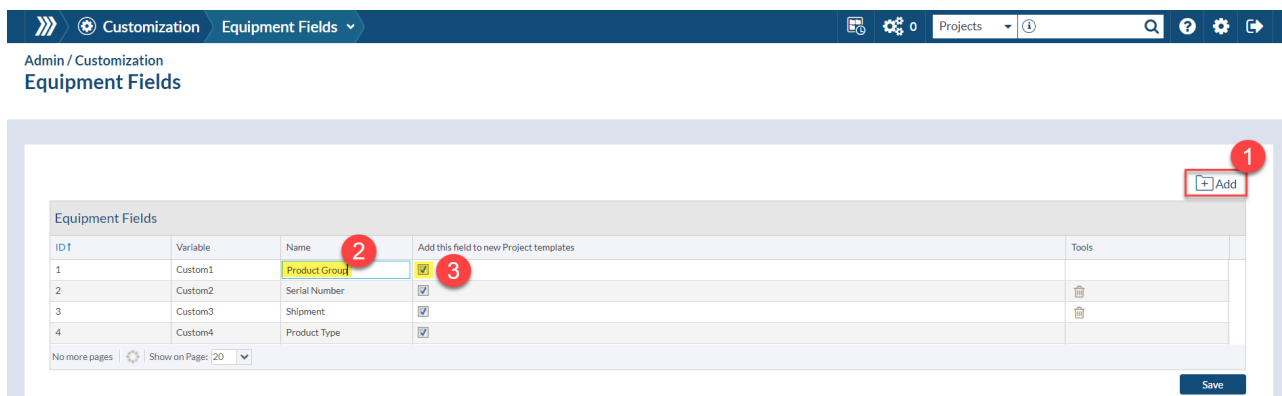
## Global Equipment Fields

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 System Menu > Customization > Equipment Fields.**



Here you can:



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

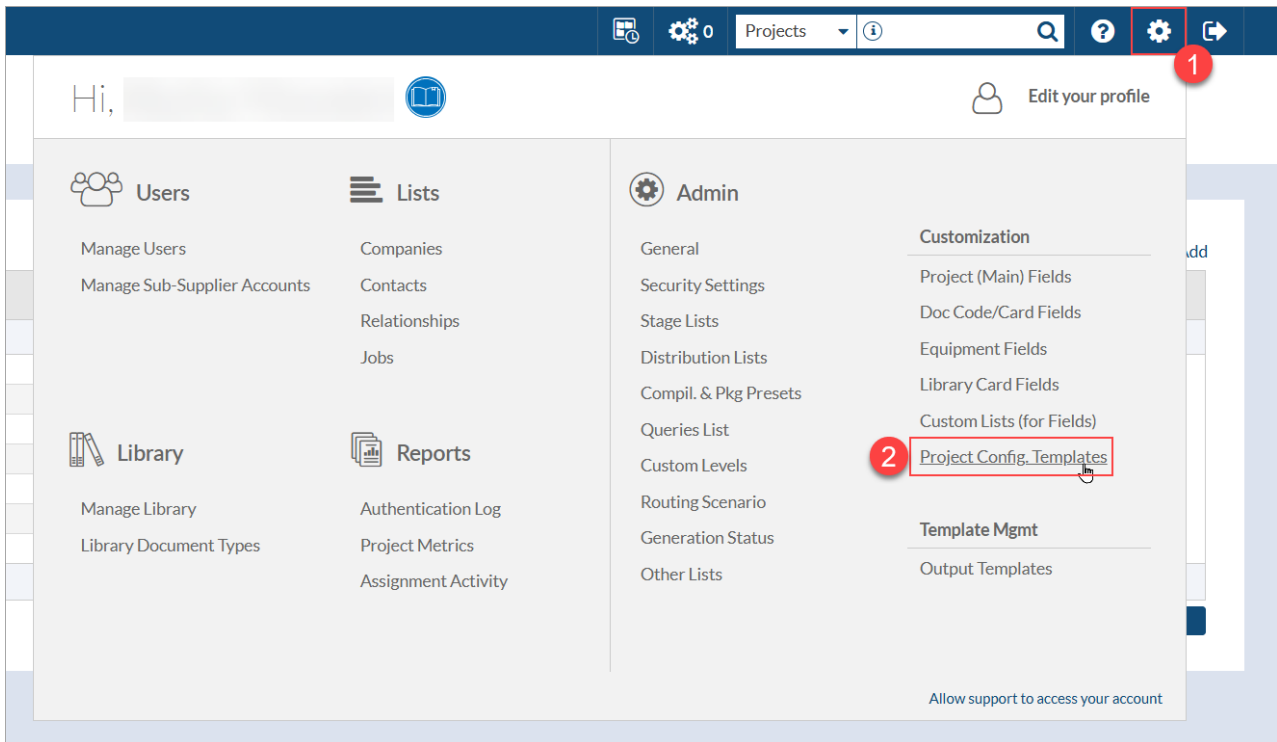
2 - Change the name of the existent custom fields (i.e. Product Group in Custom1)

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

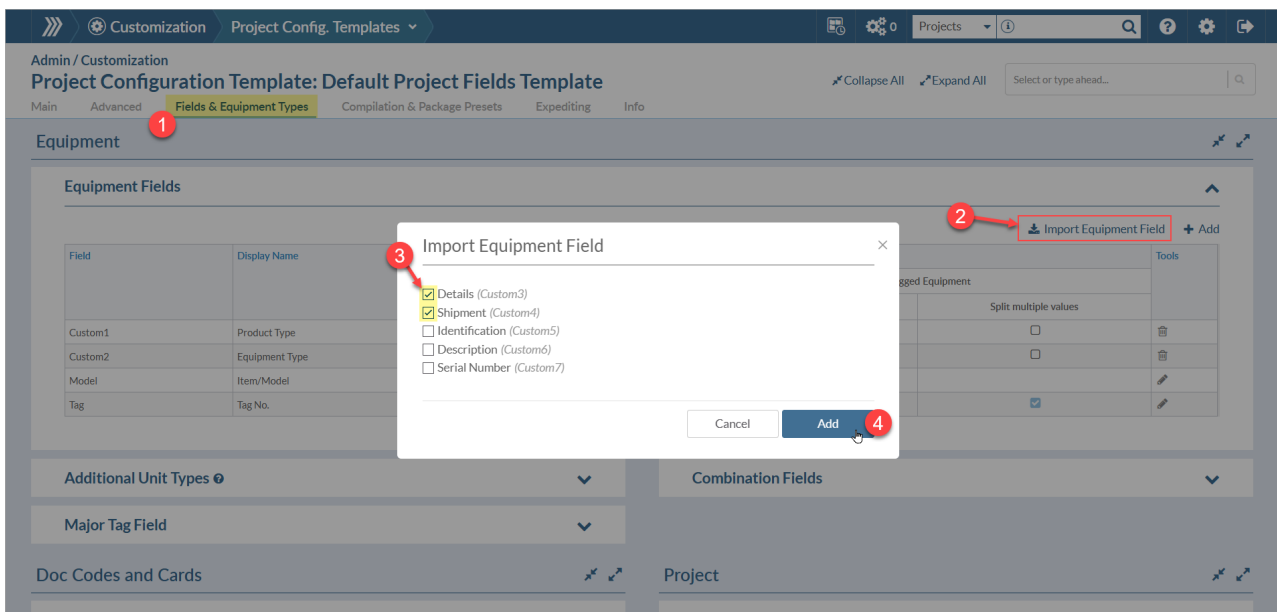
Once the equipment fields have been created, these have to be enabled in the Project Template.

## Enabling the Equipment Fields for New Projects

To enable the fields for **NEW** Projects only, navigate to **System Menu > Customization > Project Config. Templates** and click on your template.



Navigate to "Fields & Equipment Types" tab and 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.

Admin / Customization  
Project Configuration Template: Default Project Fields Template

Main Advanced **Fields & Equipment Types** Compilation & Package Presets Expediting Info

Equipment

Equipment Fields

Import Equipment Field + Add

Field	Display Name	Field Management					Tools
		Major Tag		Tagged Equipment			
		Enable	Required	Enable	Required	Split multiple values	
Custom1	Product Type			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Custom2	Equipment Type			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Custom3	Details	<input type="checkbox"/>		<input checked="" type="checkbox"/>			
Custom4	Shipment	<input type="checkbox"/>		<input checked="" type="checkbox"/>			
Model	Item/Model	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tag	Tag No.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

Once enabled, there is also the option to set them as requested and make the field mandatory when adding the equipment units. The option to split multiple values when using multiple quantity upload option is also available.

Admin / Customization  
Project Configuration Template: Default Project Fields Template

Main Advanced **Fields & Equipment Types** Compilation & Package Presets Expediting Info

Equipment

Equipment Fields

Import Equipment Field + Add

Field	Display Name	Field Management					Tools
		Major Tag		Tagged Equipment			
		Enable	Required	Enable	Required	Split multiple values	
Custom1	Product Type			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Custom2	Equipment Type			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Custom3	Details			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Custom4	Shipment			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Model	Item/Model	<input type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Tag	Tag No.			<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	

## Enabling the Equipment Fields for Existing Projects

To enable the fields on **EXISTING** Projects, navigate to your Project and open the **Project Configuration** page.

Valve Project (0001234) Project Configuration

Set Up  
Project Configuration

Main Advanced Fields & Equipment

Project Profile

Project Profile

Doc Code and Status Lists

Users and Key Contacts

Card Settings

Turn Around Days

Project Hub

Cards

Code List

Card List

Card to Unit Changes

Obsolete Cards

Outstanding Actions

Cards In/Out

Incoming Documents

Outgoing Submittals

Index Reports & Compilations

Equipment

Equipment List

Levels

Prices & Estimates

Set Up

Project Configuration

Stage Lists

ACME Return Statuses

Internal Approval Statuses

Distribution Lists

Routing Scenario

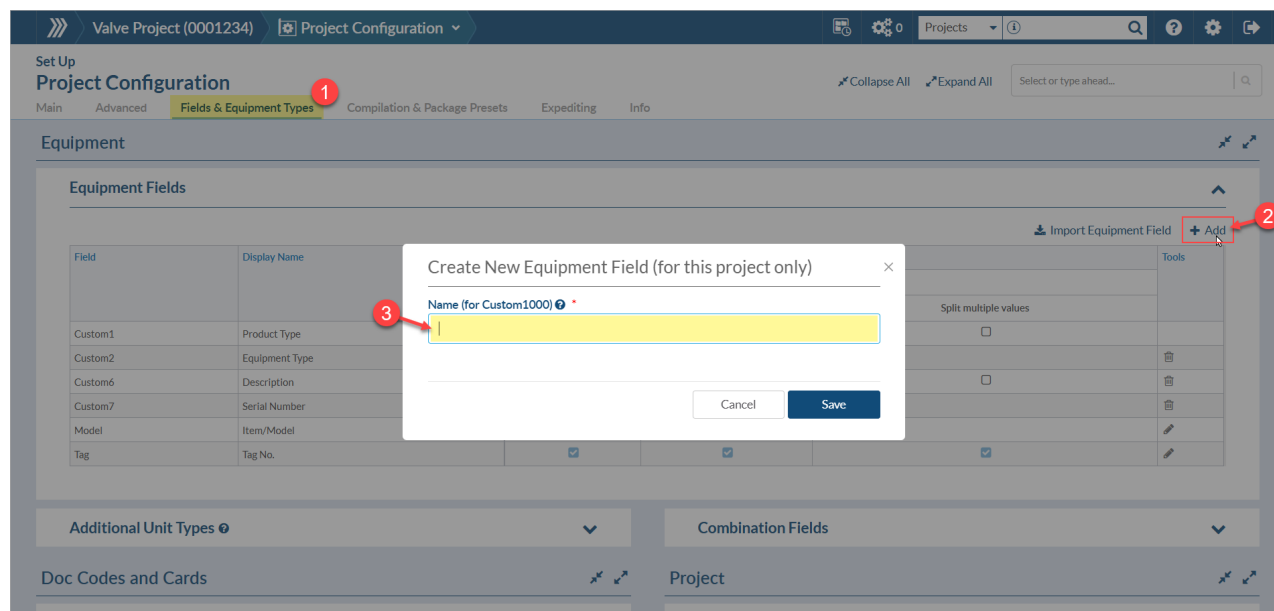
Card States

Using defaults

Numbering

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 Configuration** setting, there is the possibility to save the change back to Project Config. Template (at admin). To do this, navigate to the "Info" tab and select the option to update the master template:

Valve Project (0001234) Project Configuration

Set Up  
Project Configuration

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting **Info**

**Template Details**

**Name**  
Default Project Fields Template

**Owner**  
System

**Name prefix in dropdown**  
Omega

Project Set Up fields are no longer in sync with this project's master template. Click to update master template

Alternatively, there is also the option to save the current project configuration as a new **Project Configuration Template** (at admin), allowing the configuration to be re-used on future projects. This can also be done from the "Info" tab.

Valve Project (0001234) Project Configuration

Set Up  
Project Configuration

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting **Info**

**Template Details**

**Name**  
Default Project Fields Template

**Owner**  
System

**Name prefix in dropdown**  
Omega

Project Set Up fields are no longer in sync with this project's master template. Click to save as new template

## 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
<input type="checkbox"/>	1	Blind	8244	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	2	Blind	7036	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	3	Blind	3328	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	4	Blind	1576	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	5	Blind	8109	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	6	Blind	7039	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	7	Blind	8248	Sub-Supplier 1	Y	Stainless Steel
<input type="checkbox"/>	243	Paddle blank & spacer	8403	Sub-Supplier 1	X	Cast Material
<input type="checkbox"/>	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
<input type="checkbox"/>	<input checked="" type="checkbox"/>	MRB	Manufacturing Record Book	Document Number to be provided by Com	Stainless Steel	X, Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	BOM	Bill of Material	P7564-PO018-400-30-BOM-0010	Stainless Steel	X, Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	Dimensional Drawing	P7564-PO018-400-30-DWG-0001		X
<input type="checkbox"/>	<input checked="" type="checkbox"/>	DMD	Dimensional Drawing	P7564-PO018-400-30-DWG-0002	Stainless Steel	Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	ITP	Inspection and Test Plan	P7564-PO018-400-30-ITP-0001	Stainless Steel	X, Y
<input type="checkbox"/>	<input checked="" type="checkbox"/>	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