

Custom Asset Types

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From here you can have a 'read only' view of the custom asset types created at your organisation or inherited from your parent organisation.

- An asset type must exist before you can create an asset of this type for a client.
- You need to be an 'Administrator' in order to create an Asset type.

The screenshot shows the Synaptic client profile form. The 'Settings' menu is open, highlighting 'Custom Asset Types'. The form fields include:

- Title: Mr
- Name: Example
- Address: Test, Test Road, county
- Postcode: AAA 123
- Date of Birth: 01/11/1980
- Sex: Male
- Smoker: No
- Occupation: Baker
- Home, Office, Mobile, Email: (empty)
- Salary £: (empty)
- Service Level: Platinum
- Attitude to Risk: Balanced
- External Identifier: (empty)

The screenshot shows the 'Custom Assets' table with the following data:

| Asset Name | Active | Add |
|---------------------|--------|------|
| Commercial Property | ✓ | 📄 🗑️ |
| Holiday Home | ✓ | 📄 🗑️ |
| home | ✓ | 📄 🗑️ |