## How do I add custom asset types?

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From here you can create custom asset types for the organisation (and children) or view the types that have been inherited from the parent organisation.

You would need to create asset types for the user in order that they exist before the user can create an asset of this type for a client.

In order for you to do this, the organisation must have to relevant permission.

Go to **Settings** and select **Custom Asset Types** to start reviewing the custom asset types for the organisation. The screen will list all the custom asset types you have created or inherited and their status.



Click the edit pen to edit existing types, the two page symbol to duplicate or the view icon to see inherited types.

Click on the **add** button to add a new type.

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The user will then be given the opportunity to complete the asset type details, by allocating an asset name, make it active and set the sharing options, the choices either being for internal or public use.

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castic Version 12133	Copyright @ 2013-2014 Capita Financial Software 245   Accessibility	Save Save & Close O Cancel

Define what this asset type is made of in terms of asset classes.

The top box will allow for the selection from Financial Express (FE) asset classes. These are the asset classes that the fund data is supplied in. Click **Add** to view the tree of possible classes to select from.

Underlying Asset Classes Please	configure using FE asset classes	(	
FE Asset Class	5: Allocated (0.0%)	Asset Allocation	The user can either tick the box to make the selection or click <b>add</b> .
Asset Classes expressed as your o	srganisation's investment strategy asset classes (read-only) % Allocated	Asset Allocation	
	FE Asset Classes Asset Classes expressed as your o	Asset Classes expressed as your organisation's investment strategy asset classes (read-only)	FE Asset Class       % Abocated (0.00%)       Asset Allocation         Asset Classes expressed as your organisation's investment strategy asset classes (read-only)       Asset Allocation

The user will need to select the asset classes they wish to add.

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Equities     Equities     Equities     Exed Interest     Islamic Instruments     Mixed Assets     Money Market     Mutual Funds     Others     Property     Unknown	Commodity & Energy		
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Or click on the arrow by the side of the selection and continue to make the selection until the user arrives at a tick box required.

Co	mmodity & Energy	
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	Belgian Large Cap Equities	
	Belgian Mid Cap Equities	
	Belgian Small Cap Equities	
	Czech Republic Equities	
	Danish Equities	
	Developed European Equity	

Once the asset classes have been selected and added, the user will be able to add the % weightings in each class.

Details	Underlying Asset Classes Please config	gure using FE asset classes		
Underlying Assets	FE Asset Class	% Allocated (200.00%)	Asset Allocation	
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If the user scrolls down to the bottom of the screen and selectsupdate graph, the system will return the asset classes deployed in the investment strategy which the user will see when they create an asset of this type for their client.

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	Underlying Asset Classes Please config	ure using FE asset classes			
Details	FE Asset Class	% Allocated (100.00%) Add 🕀	Asset Allocation		
Underlying Assets	Industrial Metals	33 😧		Industrial Metals (33.00%) Mixed Assets (33.00%)	
	Mixed Assets	33		American Physical Property	
				(34.00%)	
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		34 🐼		(34.00%)	
			Asset Allocation	(34.00%)	
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	Asset Classes expressed as your organis Asset Class	ation's investment strategy asset classes (read-only % Allocated		Commodities (33.00%)	

When completed click the **Save & Close** button