



## How to Use Existing Equipment as a Template When Adding New Equipment

CFAWin includes a template feature when creating new equipment to reduce manual data entry. Templates are useful when adding similar equipment or inputting the replacement for an older unit.

- **The following information is copied to the new equipment and must be manually edited if different from the template**
  - Makes, Models, Rollups, including Serial Numbers
  - Assignments, including License and Asset Number
  - Meter Readings
  - Age specifications
  - Meter, Fuel, and Fluid specifications
  - Depreciation, Fixed Costs, & Replace
  - Permits
  - PM Schedules, including Last Readings and Last Completed On, and PM Checklists
  - Equipment Notes
  - Warranty, including Starting Meter and Starting Date
  - Repairs To-Do
- **The Following are not copied to the new equipment record:**
  - JPEGs
  - Depreciation Cost and Book Value
  - Costs and Qtys

### Using a Record as a Template:

1. *Highlight the equipment to use as a template in the Equipment Table*
2. *Click the New (white paper) icon*
3. *Enter the new equipment number and click OK*
  - i. Application message appears. "USER, do you want to use Equipment#: 'XXX' as a template?"
4. *Click Yes*
  - i. The new Equipment Record is created as an exact copy of the highlighted equipment
5. *Edit the Equipment Information as necessary for instances where the new Equipment is different from the template, such as Serial Number or Age*
6. *Update Equipment Information that is not copied, such as Depreciation, if being tracked*