Create Manual Cards (Individual)

07/23/2025 1:20 pm MDT

Users may now add manual cards to their projects, even when just using the tagged equipment units.
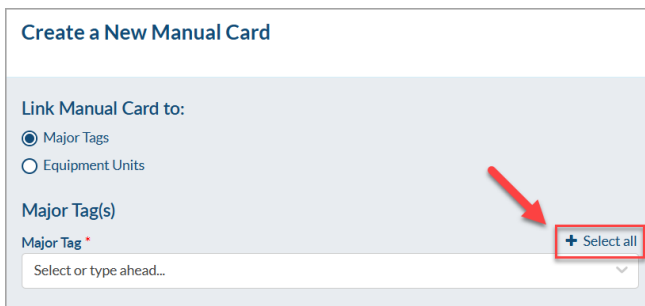
First - ensure the manual card module has been enabled on your project.

Add Cards

To add an individual card, click the + in the top right of the card list screen. You can also find this add icon in the assign screen.

Link to Equipment

If the major tags module is enabled, you will be given an option about which type of card you want to create. For major tags, you will be prompted to select which major tags to link. If all major tags should be linked, simply click "Select all":

For Equipment Units, the process is as described below:

1. Choose Equipment Units

2. Navigate to expanded "Equipment Units" form

2. Start step 1.

    i. Expand Step 1 drop-down.

    ii. Filter the list of items if you wish. This can help jumpstart the equipment you want to select.

    iii. Check the box to the left of each desired unit. If you have filtered the grid in step 2, you might just check "Select all".

    iv. Select those units.

3. Start step 2

    i. Once selected, the items turn grey. If you are editing an existing card, the units already assigned will already be grey.

    ii. Expand Step 2 drop-down.

    iii. Review the equipment selected for this card. If you want, you can remove units (under "Tools").

iv. Once finished, save the changes to units linked to this card.

4. Return to main manual card form (right side)

   i. Once saved, you now see that 4 units are assigned to this card. If you ever want to edit/review the units, click " 🖊 Edit"

   ii. Choose the primary code (only one allowed)

   iii. Choose the secondary codes (multiple allowed)

   iv. Set the document number. If you want DocBoss to assign the number for you, check the Use Auto-generated value.

   v. Save the card

Now you have a new card added to the card list.

Note: To edit the "Reference" of a Manual Card, you must update the document number. For Manual Cards, the Reference = Document Number.