

# Create Manual Cards (Individual)

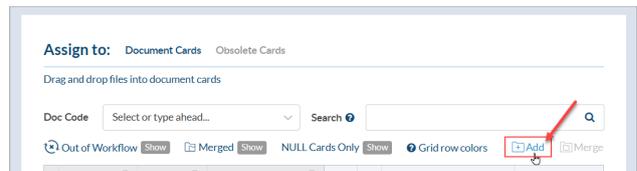
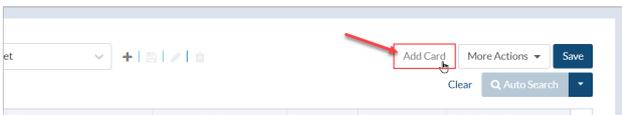
05/05/2026 11:02 am MDT

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.

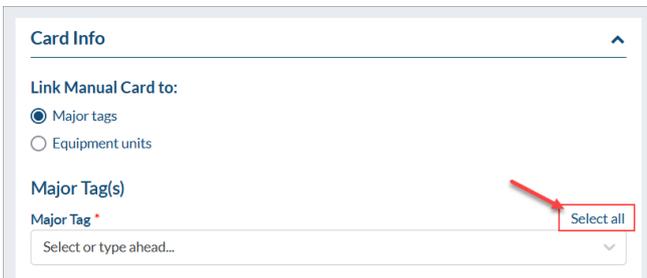
## Add Cards

To add an individual card, click the "Add Card" button in the top right of the card list screen. You can also add a new card from the incoming assign screen.

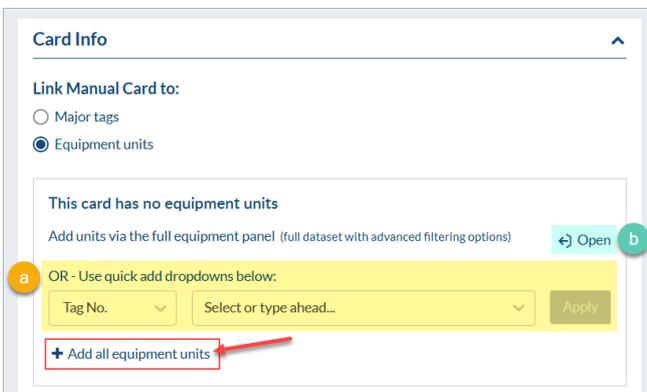


## Link to Equipment

If the major tags module is enabled, you will have the option to link cards to major tags OR equipment units. If linking via major tags, you will be prompted to select which major tag(s) to link. If all major tags should be linked, simply click "Select all":



If linking via Equipment units, you can add units using either (a) the quick add drop-downs, OR (b) the full equipment panel (for advanced filtering options). If all equipment units should be linked, simply click the "Add all equipment units" button.



If adding from the full equipment panel, click the "Open" button and follow the process as described below:

## Step 1 - Add New Units to Card

- Filter the list of items if you wish. This can help jumpstart the equipment you want to select.
- Check the box to the left of each desired unit. If you have filtered the grid, you may just check "Select all".
- Select the units.

New Card Linked To Equipment Units

### Equipment Units

#### Step 1: Add New Units to Card

**a** Filter Units

Level  Reference

Grid row colors

Choose Additional Equipment Units

Line No. (Omega CAN) I	Item/Model	Tag No.	Sub-Supplier
<input checked="" type="checkbox"/> 1	P-300 Compact Pump	1234 - A	Sub-Supplier 1
<input checked="" type="checkbox"/> 2	P-300 Compact Pump	5678 - A	Sub-Supplier 1
<input type="checkbox"/> 3	P-450 Centrifugal Pump	1234 - B	Sub-Supplier 2
<input type="checkbox"/> 4	P-450 Centrifugal Pump	5678 - B	Sub-Supplier 2
<input type="checkbox"/> 5	P-750 Industrial Pump	1234 - C	Sub-Supplier 3
<input type="checkbox"/> 6	P-750 Industrial Pump	5678 - C	Sub-Supplier 3

No more pages

**c**

#### Step 2: Review Selected Units

No equipment units

## Step 2 - Review Selected Units

- Review the equipment selected for this card. If required, you can remove units (from the "Tools" column).
  - Note: Selected items will turn grey in the step 1 grid. If you are editing an existing card, the units already assigned appear in grey.*
- Once finished, save the changes to units linked to this card.

New Card Linked To Equipment Units

## Equipment Units

Choose Additional Equipment Units

Line No. (Omega CAN) ↑	Item/Model	Tag No.	Sub-Supplier
1	P-300 Compact Pump	1234 - A	Sub-Supplier 1
2	P-300 Compact Pump	5678 - A	Sub-Supplier 1
<input type="checkbox"/> 3	P-450 Centrifugal Pump	1234 - B	Sub-Supplier 2
<input type="checkbox"/> 4	P-450 Centrifugal Pump	5678 - B	Sub-Supplier 2
<input type="checkbox"/> 5	P-750 Industrial Pump	1234 - C	Sub-Supplier 3
<input type="checkbox"/> 6	P-750 Industrial Pump	5678 - C	Sub-Supplier 3

No more pages | Show on page: 50 | Items on page: 6 |  Select All (this page only) |  Select All (all pages)

Select Units

Step 2: Review Selected Units 2 equipment units

Grid row colors

Selected Equipment Units

Line No. (Omega CAN)	Item/Model	Tag No.	Sub-Supplier	Tools
<input type="checkbox"/> 1	P-300 Compact Pump	1234 - A	Sub-Supplier 1	
<input type="checkbox"/> 2	P-300 Compact Pump	5678 - A	Sub-Supplier 1	

No more pages | Show on page: 20 | Items on page: 2 |  Select All (this page only) |  Select All (all pages)

Remove Selected

Cancel **Submit Changes to Linked Units**

Once saved, you now see the units assigned to this card. If you ever need to edit/review the units.

Card Info

Link Manual Card to:

**2 equipment units**

Add units via the full equipment panel (full dataset with advanced filtering options) [↔ Open](#)

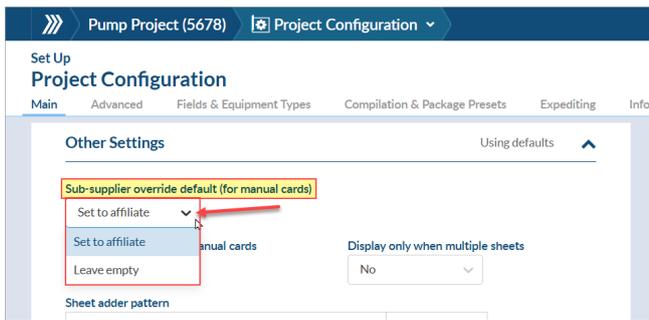
OR - Use quick add dropdowns below:

Tag No.  Select or type ahead...

## Fill in remaining fields

Once equipment has been linked to the card, complete card creation by filling out the remaining fields:

- Primary code
- Secondary code(s) (if required)
  - *Note: More than one secondary doc code may be selected.*
- Document sub-supplier override
  - The sub-supplier will either be set as your affiliate company OR will be left blank (resulting in the sub-supplier(s) being pulled from the linked equipment), depending on which option is chosen as the default (Project Menu > Set Up > Project Configuration > Main > Card Settings > Other Settings).



- Reference
  - *Note: If no reference value is added, the reference will automatically become the internal document number.*
- Document title
- Document number(s).
  - If you would like DocBoss to assign an internal document number for you, check the " Use auto-generated value" box.

### Card Info

Link Manual Card to:

**2 equipment units**

Add units via the full equipment panel (full dataset with advanced filtering options) ↔ Open

OR - Use quick add dropdowns below:

Tag No.  Select or type ahead...  Apply

**Primary code \***

Select or type ahead...

**Secondary code(s)**

Select or type ahead...

**Equipment number \***

Tag No.

**Document sub-supplier override**

Omega Supply - CAN

**Reference \***

**Document title \***

### Card Numbers & Revisions

Is drawing

Doc no. (123 Eng)

**Doc no. (Omega CAN)**  Use auto generated value

Rev # (Omega)

0

Doc no. (Sub-Supplier )

Doc No. (End User)

Due to 123 Eng