Auto-Generate Placeholders

11/10/2025 3:51 pm MST

Save time with automated placeholder creation

Generate placeholders for every required document—engineered equipment (pumps, tanks, etc.) or manufactured products (valves, instrumentation). Upload Excel lists or let DocBoss generate them for you.

What are cards in DocBoss?

Cards are objects that contain all of the metadata and revisions for a document. The **card list** provides a list of all documents on the project, and all details are displayed in a tabular view.

See it in action

This video shows how to create different numbers of placeholders based on the codes and equipment you have added to the project.

Create placeholders efficiently

Generate your placeholder list quickly and easily with a few clicks. No need for time-consuming clerical work to get your project started.

Transform codes into placeholders

Use your customer's code list to have DocBoss automatically create placeholders for you - no manual work required.

Specify the number of placeholders

Need one placeholder per order? Per unit? Per shipment? Auto-generate as many placeholders as you need with pre-made and custom levels.

Manually create placeholders

Sometimes you need a placeholder for a document that doesn't follow a clear pattern. No problem! Manual cards can be created when needed.

How to change the doc code level

It's easy to change the number of placeholders that are automatically created!

Step 1: For any doc code, click to open the drop-down selector in the "Level" column
Step 2: Choose the equipment value that will result in the number of placeholders you need (e.g., order, item/model, tag, etc.)
Step 3: Click save to apply your changes

Manage placeholders with ease

Once your placeholders are created, update the list to meet the requirements of your customer.

Auto-generate document numbers

When placeholders are created, document numbers are auto-generated, too! You can update the numbering patterns as needed and have the changes applied automatically.

Remove placeholders

Have placeholders for documents that your customer doesn't need? Set these placeholders as "unrequired" to have them removed from the document index and final data book.

Adjust placeholders

Created your placeholders but later need to make changes? No problem - the list is flexible and placeholders can be merged, split, or otherwise adjusted when needed.

Edit placeholders via CSV

Details about each placeholder can be adjusted in bulk through CSV upload, speeding up the process.

Start saving time today

Book a personalized demo with one of our Product Specialists today to see how these features can be customized to suit your company's needs.

Or, check out our other features here.