

Can equipment be modified on auto-generated cards?

12/05/2025 11:15 am MST

Auto-generated cards have their tagged equipment (and major tag(s), if applicable) automatically applied based on the level that is set on the doc code.



Example: Doc code level is set to "Item/Model." As such, each card will include the tagged equipment units that correspond to the item/model value.

Line No.	Item/Model	Tag No.
1	Model A	T-101
2	Model A	T-102
3	Model B	T-103
4	Model B	T-104
5	Model B	T-105
6	Model C	T-106

If the documentation received includes more/less tags than are included on the auto-generated card(s), there are three different options to adjust the card(s) depending on the situation:

Option 1: Split card(s)

If a card includes multiple equipment units but you receive documentation with these tags separated, using the **split** function allows you to separate the auto-generated card into the appropriate number of cards (allowing the units to be managed separately). The split cards will still be auto-linked to the equipment list, meaning any updates to the equipment list will be auto-applied.

See this article for more information: [Split a card \(and split equipment list\)](#)



Example: Doc code level is set to "Item/Model" and you receive two pieces of documentation for Model A (one for each tag - T-101, T-102).

Option 2: Merge cards

If there are multiple cards with different equipment units but you receive documentation with these tags combined, using the **merge** function allows you to combine multiple auto-generated cards together (allowing the units to be managed together). The merged card will still be auto-linked to the equipment list, meaning any updates to the equipment units will be auto-applied.

See this article for more information: [Merge Cards](#)



Example: Doc code level is set to "Tag No." and you receive one piece of documentation for T-101 and T-102 combined (both tags for Model A).

Option 3: Manual adjustment

If neither splitting or merging cards will result in the card configuration you require, there is the option to manually adjust the equipment included on a card. Manually adjusting the equipment will result in the card becoming manual, meaning that any updates to the equipment list will **not** be auto-applied.



Example: Doc code level is set to "Item/Model" and you have manually adjusted the equipment on the "Model A" card. If a new equipment unit is added to the equipment list for this item/model value, the equipment included on the "Model A" card will **not** auto-update (and equipment will need to be manually adjusted on the card).

To manually adjust the equipment units included on a card, follow the steps below:

1. Open the card edit form and from the "Link Auto Cards to"" section, click the "Edit" button. With the equipment units form open on the left, click the "Edit" button.

Edit Auto Card Linked to Equipment Units
Equipment Units

Units are auto-linked: Level = Item/Model (TE) Reference = 567ABC891DE [Edit](#)

Note: that if you edit the units auto-links you can change reference or convert this card into a manual card.

☒ Grid row colors ☒ Linked Units Only ☒ On

Line No. (Omega)	Item/Model	Tag No.	Sub-Supplier	Product Type	Description
5_I	567ABC891DE	123-5764	Valve Company	Model 5	
5_II	567ABC891DE	123-5765	Valve Company	Model 5	
5_III	567ABC891DE	123-5766	Valve Company	Model 5	
5_IV	567ABC891DE	123-5767	Valve Company	Model 5	
5_V	567ABC891DE	123-5768	Valve Company	Model 5	

No more pages | Show on page: 100 | Items on page: 5

Edit Card

Link Auto Card to:
Auto-linked to: 5 equipment units
Level: Item/Model (TE)
Reference: 567ABC891DE [Edit](#)

Document Info

Linked Equipment Sub-Suppliers
Valve Company

Document Sub-Supplier Override
- Select Sub-Supplier -

Reference
567ABC891DE

Document Title
Data Sheets

Tags

Tag No.(s) List
123-5764, 123-5765, 123-5766, 123-5767, 123-5768

2. Choose the additional equipment units to include on the card (if applicable) and click "Select Units" to add them.

Edit the Equipment Units linked to this Card
Equipment Units

Step 1: Add New Units to Card

☒ Grid row colors [Filter Units](#) [Show](#)

Line No. (Omega)	Item/Model	Tag No.	Sub-Supplier	Product Type
5_V	567ABC891DE	123-5768	Valve Company	Model 5
5_IV	567ABC891DE	123-5767	Valve Company	Model 5
5_III	567ABC891DE	123-5766	Valve Company	Model 5
5_II	567ABC891DE	123-5765	Valve Company	Model 5
5_I	567ABC891DE	123-5764	Valve Company	Model 5
<input checked="" type="checkbox"/> 4_V	456ABC789DE	123-5763	Valve Company	Model 4
<input checked="" type="checkbox"/> 4_IV	456ABC789DE	123-5762	Valve Company	Model 4
<input checked="" type="checkbox"/> 4_III	456ABC789DE	123-5761	Valve Company	Model 4
<input type="checkbox"/> 4_II	456ABC789DE	123-5760	Valve Company	Model 4
<input type="checkbox"/> 4_I	456ABC789DE	123-5759	Valve Company	Model 4

Select Page: 5_V - 4_I [10] | Show on page: 10 | Items on page: 10 | Total found: 25 | ☐ Select All (this page only) ☐ Select All (all pages)

[Select Units](#)

3. Choose the equipment units to remove from the card (if applicable) and click "Remove Selected" to remove them.

Edit the Equipment Units linked to this Card

Equipment Units

Step 1: Add New Units to Card

Step 2: Review Selected Units

8 equipment units

Grid row colors

Selected Equipment Units

Line No. (Omega)	Item/Model	Tag No.	Sub-Supplier	Tools	Product Type	Description
<input type="checkbox"/> 4_III	456ABC789DE	123-5761	Valve Company		Model 4	
<input type="checkbox"/> 4_IV	456ABC789DE	123-5762	Valve Company		Model 4	
<input type="checkbox"/> 4_V	456ABC789DE	123-5763	Valve Company		Model 4	
<input checked="" type="checkbox"/> 5_I	567ABC891DE	123-5764	Valve Company		Model 5	
<input checked="" type="checkbox"/> 5_II	567ABC891DE	123-5765	Valve Company		Model 5	
<input type="checkbox"/> 5_III	567ABC891DE	123-5766	Valve Company		Model 5	
<input type="checkbox"/> 5_IV	567ABC891DE	123-5767	Valve Company		Model 5	
<input type="checkbox"/> 5_V	567ABC891DE	123-5768	Valve Company		Model 5	

No more pages
Show on page: 20
Items on page: 8

☐ Select All (this page only)
☐ Select All (all pages)

Remove Selected

- Once the selected units match your requirements, click the button to "Submit Changes to Linked Units." Once clicked, a pop-up will appear notifying you that the card will be converted to a manual card - click "Yes" to proceed.

☒ 5_V
567ABC891DE
123-5768
Valve Company

Model 5

No more pages
Show on page: 20
Items on page: 8

☐ Select All (this page only)
☐ Select All (all pages)

Remove Selected

4

Back
Cancel
Submit Changes to Linked Units