## Can equipment be modified on autogenerated cards?

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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**

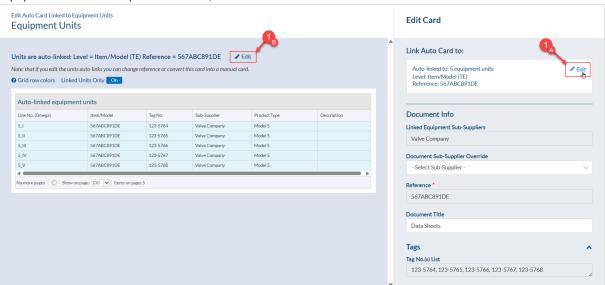
If neither splitting or merging cards will result in the card configuration you require, there is the option to manually adjust the equipment included on a card. Manually adjusting the equipment will result in the card becoming manual, meaning that any updates to the equipment list will **not** be auto-applied.



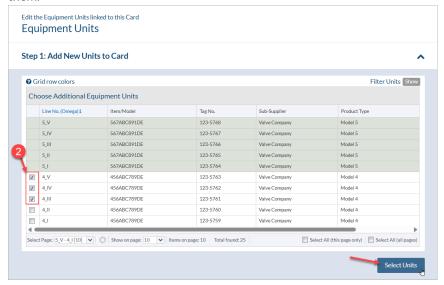
Example: Doc code level is set to "Item/Model" and you have manually adjusted the equipment on the "Model A" card. If a new equipment unit is added to the equipment list for this item/model value, the equipment included on the "Model A" card will not auto-update (and equipment will need to be manually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

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

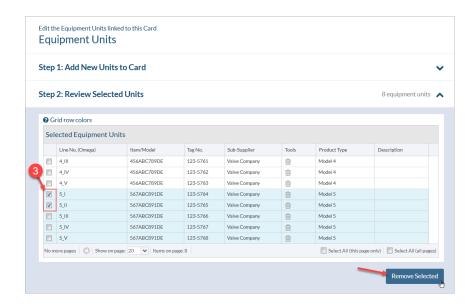
1. Open the card edit form and from the "Link Auto Cards to" section, click the "Edit" button. With the equipment units form open on the left, click the "Edit" button.



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



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



4. 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.

