

Can equipment be modified on auto-generated cards?

04/30/2026 1:40 pm MDT

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.

1 A

1 B

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

2

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_J	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

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.

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

Submit Changes to Linked Units

Back Cancel

Note: If the project only includes major tags (no tagged equipment units), the option to manually adjust the equipment is still available. If an auto-generated card is changed to a manual card, you can adjust the linked major tag(s) as needed.

Card List ▼

Edit Card

Card Info ▲

Link Auto Card to:

Not linked to Tagged Equipment
 Level: Major tag
 Reference: 1

Edit

Confirmation ×

Auto-generated card will be changed to manual card. Proceed?

No **Yes**

- Select sub-supplier - ▼