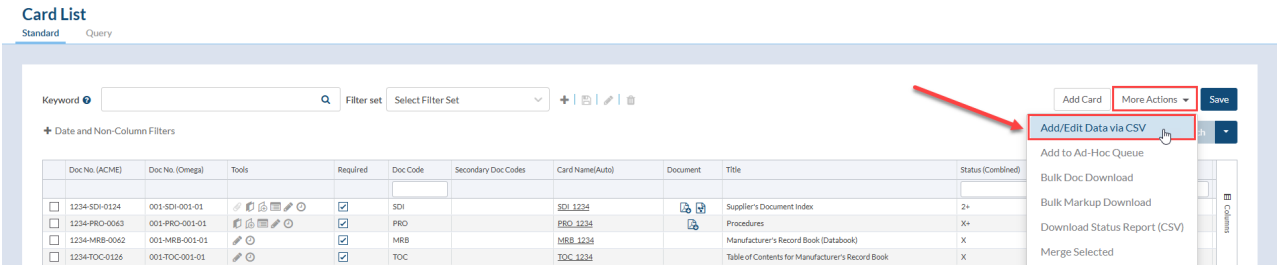
Create Manual Cards (Bulk)

09/28/2026 1:55 pm MDT

Ensure Manual Cards are enabled on your project, see our article to learn how to enable this function: Enable Manual Cards
To bulk add manual cards, use the "Add/Edit Data via CSV" function. This option is available under the "More Actions" drop-down.



Once clicked, a window will open with the option to download a CSV template, which provides the correct column headers and will be populated with any existing data.

There are 30+ columns on the CSV (excel sheet) download (more if you have custom columns created). If you already have cards set up on the project they will be populated in the csv file (just leave them as they are displayed). The only columns you need to enter **contain an asterisk** in the header - they are mandatory columns.

You will need to enter:

- **Primary Doc Code(ID)*** (This is the doc code the card is linked to.)

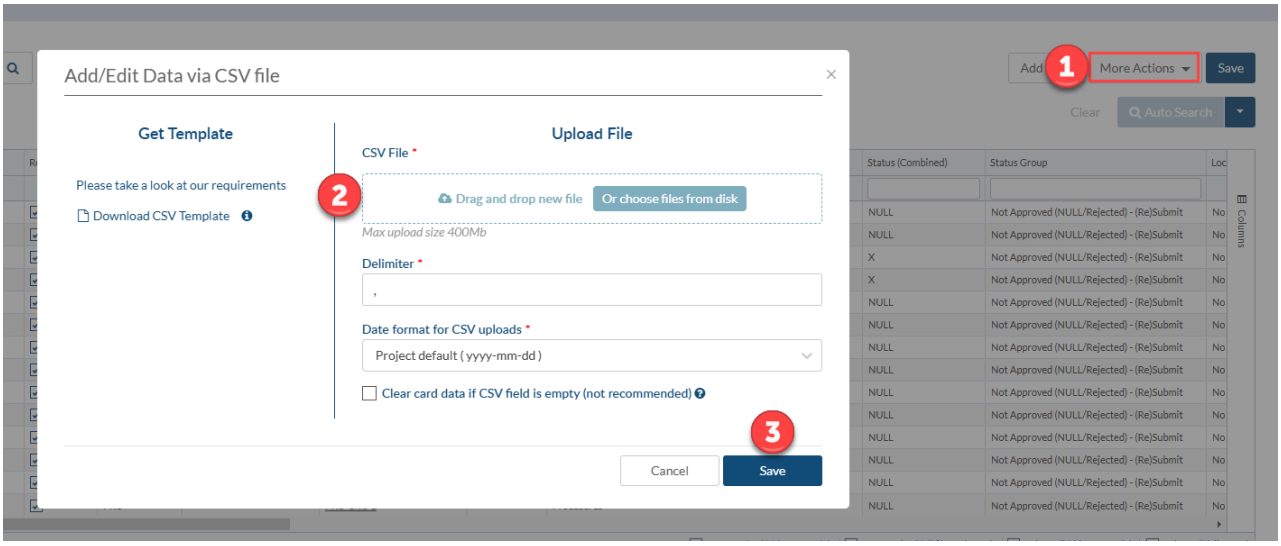
As well as one of the following (with multiple values* separated by commas):

- ***Major Tag*(*)**
- **Tag List(*)**
- **Line No. (*Supplier*) List(*)**

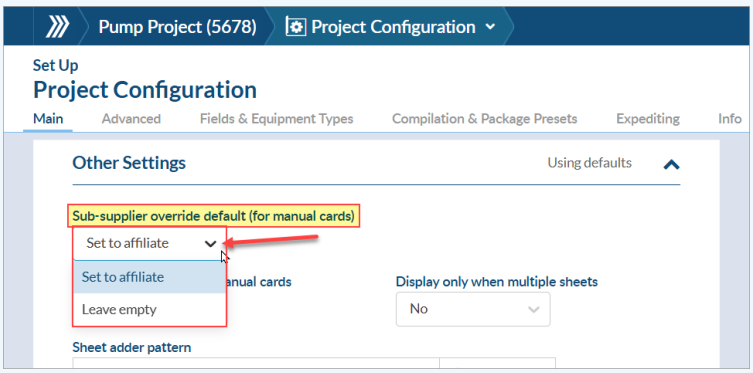
*If all tags are associated with a particular card, you may simply type "ALL" instead of listing every tag.

The bulk creation of manual cards is ideal to use when you have a lot of cards you want to create. You can add as many lines as you want, and they will all upload at the same time.

Once all applicable data has been added save the .csv file and then use the Import feature. From the "More Actions" drop-down, click "Add/Edit Data via CSV" and browse for the new file. Once loaded, click save.

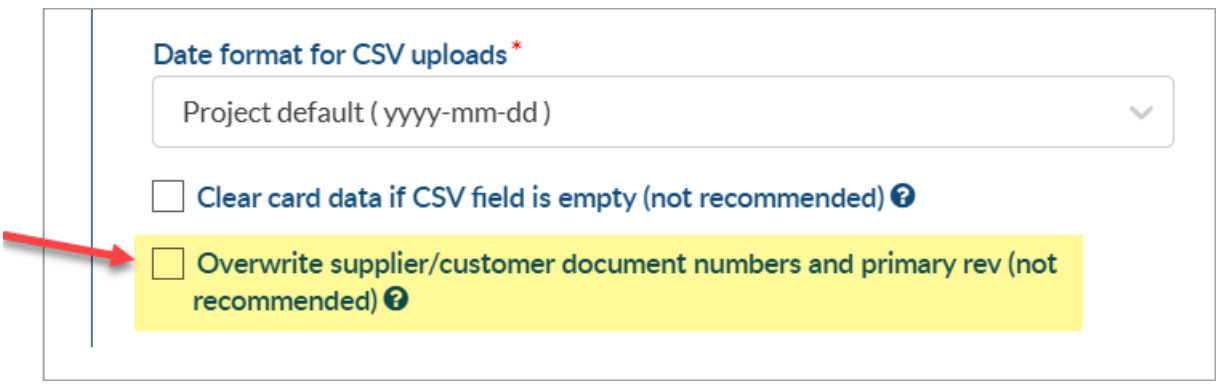


Note: Once uploaded, the sub-supplier will either be set as your affiliate company OR will pull the sub-supplier(s) from the linked equipment, depending on which option is chosen as the default (**Project Menu > Set Up > Project Configuration > Main > Card Settings > Other Settings**).



Overwriting existing values

If you have replaced an existing internal or customer document number (or have replaced the primary revision number without using the [OR*value*] command), ensure the "**Overwrite supplier/customer document numbers and primary rev**" option is checked when the CSV is re-uploaded.



Values containing commas or quotes

Review Edit Data via CSV When Using Values Containing Commas or Quotesfor formatting requirements.

Additional information

For an in depth review of how to edit your data using the csv upload click here.

If the some of the Manual Cards are documents (i.e drawings) that have multiple pages related to one piece of equipment, these can be easily uploaded using “Make Sheet of previous row” in the CSV: How to upload multiple sheets for manual cards

For more information about incoming files have a look at our video: Manual Cards