

Create Cards and Match

01/07/2026 8:15 am MST

The **Create Cards and Match** option is available for unmatched documents related to Major Tags. This allows users to create cards from information in the file name, skipping the step of adding manual cards on the project's card list before returning and matching the files.

If there is not already an existing match for a card when running bulk match, it will show under the **Files that could not be matched** grid.



Note: If a file is unmatched due to a duplication error (i.e., more than one file matches the same card), the file cannot be selected for create cards and match (see article for bulk match error details: Bulk Match Troubleshooting).

To create manual cards for unmatched files:

1. Select the applicable files.
2. Click **Create Cards and Match** (2).

Matching Uploaded Files to Document Cards

Files that could not be matched

Unmatched files will remain in the staging area.

1

<input type="checkbox"/>	File Name	Pages	Error	Tools
<input checked="" type="checkbox"/>	1000-GAD-ABC.pdf	5		
<input type="checkbox"/>	1000-GAD-YYZ.pdf	5		
<input type="checkbox"/>	1000-MTR-0202-1.pdf	5		
<input type="checkbox"/>	1000-MTR-0202-2.pdf	5		
<input checked="" type="checkbox"/>	1001-GAD-ABC.pdf	5		

No more pages Show on Page: 20

2

+ Create Cards and Match



Don't see this option? Make sure Manual Cards and Major Tags are enabled on your project template, and that a Major Tag field has been created.

3. Select the applicable Major Tag(s). If you have documents related to different sets of major tags, go back and select only the documents in the first grouping, and import the groups one at a time.
4. Select the primary doc code.

Matching Uploaded Files to D

Files that could not be matched

Unmatched files will remain in the staging area

<input type="checkbox"/>	File Name	Pages
<input checked="" type="checkbox"/>	1000-GAD-ABC.pdf	5
<input type="checkbox"/>	1000-GAD-YYZ.pdf	5
<input type="checkbox"/>	1000-MTR-0202-1.pdf	5
<input type="checkbox"/>	1000-MTR-0202-2.pdf	5
<input checked="" type="checkbox"/>	1001-GAD-ABC.pdf	5

No more pages

Show on Page: 20

Create New Manual Cards

3

Major Tag(s)

Major Tag *

MT-1 x

4

General

Primary Code *

D03 - General Arrangement Drawings

Secondary Code(s)

Select or type ahead...

5. Enter the pattern to be used for the **Document Title**. For instructions on formatting the pattern, see [Using Regular Expressions \(Create Cards and Match\)](#).

6. Enter the pattern to be used for the **Supplier Document Number**. This field uses regular expressions as well.

5

Document Title *

/:/

Status

Stage List

Select or type ahead...

Routing Scenario

Select or type ahead...

Document Card Numbers

6

Doc No. (AT) *

/:/

Rev # (Alpha)

7. Fill in any custom fields (if applicable). Text fields can be entered as text or using a regular expression. Note that if the custom text field is left empty and there is a value selected on the primary doc code, the new card(s) will inherit the same custom field value.

8. Click "Save and Create" once all fields are filled out.

7

Custom Field(s)

☐ Critical

Approver

Jessica Jones

Standing Comment

Enter text or regex pattern.

8

Preview

Cancel

Save and Create

9. When done using the bulk match process, go to the **Assign Status & Routing** tab and complete the process. See [this article](#) for steps.
