

# Send a Separate Submittal per File (Batching)

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Some customers have an automated document processing solution in place. As a result, they require every file to be issued as a separate submittal. This can create an enormous amount of work for the supplier. In DocBoss, an option exists (from the outgoing submittal area) which allows the user to automate separate submittals for every file.



Note: We suggest you use this option only when requested by your customer - it will create an enormous amount of submittals!

To begin your submittals, navigate to **Project Menu > Outgoing Submittals**, select the applicable cards, and start your submittal. From the "Start Submittal" form, follow the steps below:

1. Change the "Batching" option to "Separate submittal per file"
2. Define the first submittal number to be assigned. By default, DocBoss will use the next sequence number, but this can be modified if needed. Note that the submittal number for the subsequent submittals will be increased sequentially.
3. Select the email notification template. Only "separate file per submittal" templates can be used for this type of batching, which use card-specific variables in the email body. There is a system-provided template available, or a custom template can be created.

The screenshot shows the 'Start Submittal' form in DocBoss. The form is divided into two main sections: 'Submittal Settings' and 'Email Notification'. In the 'Submittal Settings' section, the 'Batching' option is set to 'Separate submittal per file' (indicated by a red circle 1). The 'First submittal number' is set to 'T-004' (indicated by a red circle 2). In the 'Email Notification' section, the 'Email template' is set to 'Customer Submittal [separate file per submittal] (system)' (indicated by a red circle 3). Other options include 'Send submittal email notification', 'Include transmittal in email', 'Include files in email', and 'Include hyperlink in email'.

## Creating an email template

To create a custom email template, navigate to **System Menu > Template Mgmt > Output Templates > Email Templates**. Click "+ Add" in the top right corner (above the grid).

From the slide-in form, set the template type as "Customer Submittal". A "Batching" option will appear where you can select "Separate submittal per file". Once selected, a new set of card-specific variables will be available to add.

### Create Template

**1** **Batching \***  
Separate submittal per file

**2** **Html template \***  
[Settings icon]

**3** Variables (Card) >

- Document Reference
- Doc Code
- Doc Name
- Primary Revision Number
- Secondary Revision Number
- Document Title
- Doc No. (Customer)
- Doc No. (Supplier)
- Doc No. (Sub-Supplier)
- Doc No. (End User)
- File Name

**General**  
**Template name: \***  
Customer Submittal (

Cancel Save