

Send a Separate Submittal per File (Batching)

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Separate submittal per file (batching)

Some customers have an automated document processing solution in place. As a result, they require every file to be issued on 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.

We suggest you use only when demanded by your customer - it will create an enormous amount of submittals!

The image shows two screenshots from the DocBoss interface. The top screenshot is titled "Submittal Settings" and contains the following fields: "Batching" with radio buttons for "Normal" and "Separate submittal per file" (the latter is selected and highlighted with a yellow box and a red circle labeled '1'); "First Submittal Number" with a text input field containing "T-011" (highlighted with a yellow box and a red circle labeled '2'); "Submittal Date" with a date-time picker showing "9/6/2020 15:41:25"; "Sequence" with a text input field containing "11"; "Submittal Comments" with a text area; "Turn around" with a text input field containing "10" and "(working days)"; "Distribution List" with a button labeled "Select distribution list"; and "Include markups" with a checked checkbox. Below this form is a checked checkbox for "Send submittal email notification". The bottom screenshot is titled "Notification Settings" and contains: "Email Template" with a dropdown menu showing "Customer Submittal (Default for one file per submittal) (system)" (highlighted with a yellow box and a red circle labeled '3'); "Email Subject" with a text input field containing "Submittal [NUMBER]: INPEX PO: K090-0090: INPEX Doc #: [CUSTOMER_DOC_NUMBER]"; "Include transmittal in email" with a dropdown menu showing "PDF"; "Include files in email" with an unchecked checkbox; and "Include hyperlink in email" with a checked checkbox.

1. Set batching to separate submittal per file
2. Define the first submittal number to be assigned (the rest are sequential)
3. Select the template - only dedicated templates can be used for this type of batching. It supports file specific variables to be embedded in the email body.

Creating templates

Users must identify if they are creating a template for single batch submittals.

Edit Template



Owner: System

Template Name*: Customer Submittal (Default for one file per submittal)

Template Target*: Customer Submittal

Description*: Customer Submittal Notification (Default for one file per submittal)

Email Type* Normal Separate submittal per file

Subject* Submittal [NUMBER]: [CUSTOMER_SHORT_NAME] PO: [PO_NUMBER]: [CUSTOMER_SHORT_NAME] Doc: [DOC_CODE]

Html Template* **Good day,**

Rich text editor toolbar: Variables, Cut, Copy, Paste, Undo, Redo, ABC, Link, Unlink, Table, Source, Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Decrease Indent, Increase Indent, Quote, Text Color, Background Color, Styles, Format, Font, Size, Expand/Collapse.

Variables

A new set of variables are available for card specific templates

List of available variables

Variables | **Card Variables** | Instructions

- 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

OK Cancel