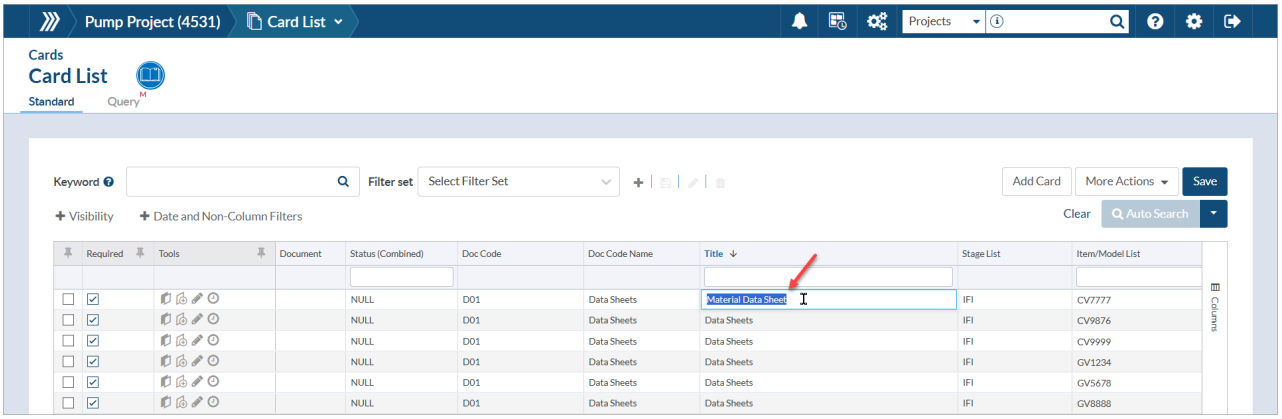
Edit Cards in Bulk

10/13/2026 3:50 pm MDT

DocBoss allows users to make changes to existing data in the Card List in bulk through two different methods: directly in the grid, and via CSV.

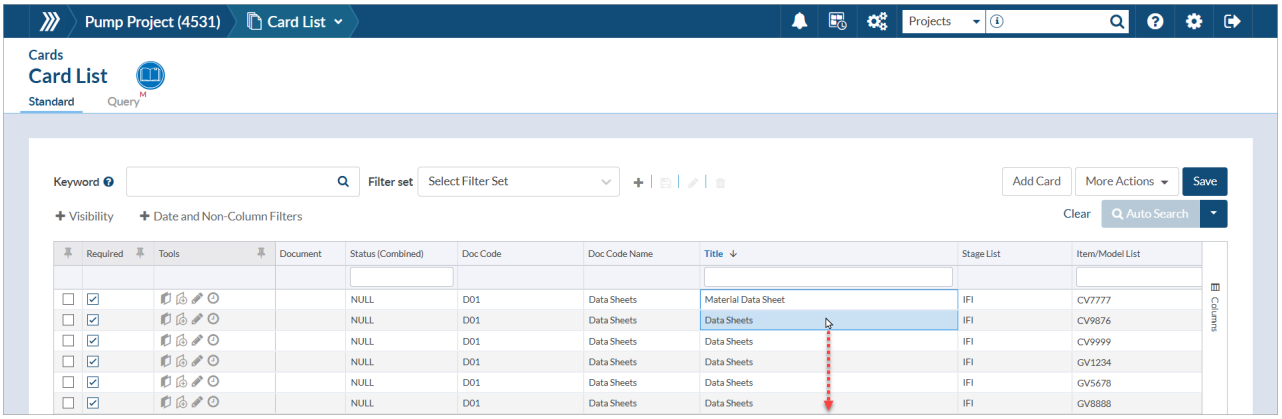
Edit Data in the Grid

To begin, filter the card list to display only the cards you wish to apply changes to. Under the column you are looking to change, copy (CTRL+C) the value that should be applied to the other cards.

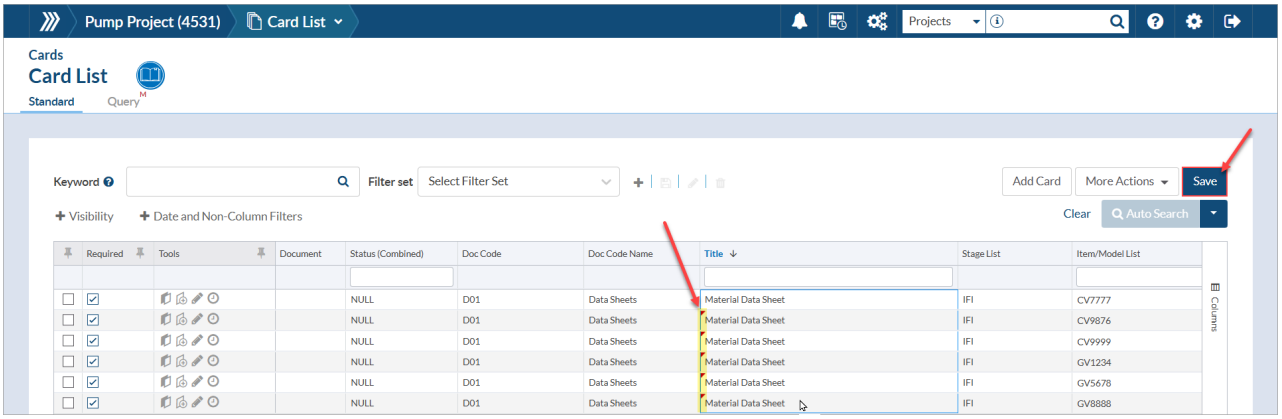


> If you're looking to apply a value from a drop-down list (e.g., the stage list), hold the **ALT** key prior to copying (CTRL+C).

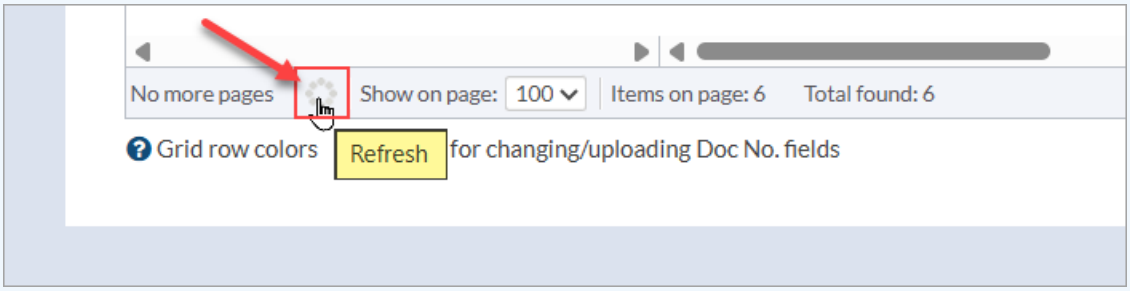
Once the value is copied, click the desired field and drag down to highlight the same field across the other cards.



Once highlighted, paste (CTRL+V) the desired value into the highlighted fields. The fields that have been changed will show a **red flag**, indicating the the change has not yet been saved. To save the change, click "Save" in the top right.

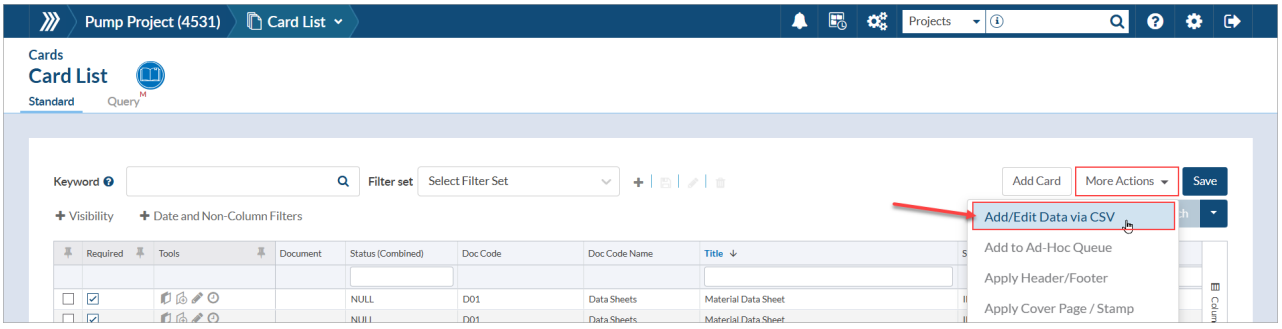


If you have made a mistake (and need to revert the change), simply reload the grid using the "Refresh" button in the bottom left. Note that the change will only be reverted if it was **not yet saved**.

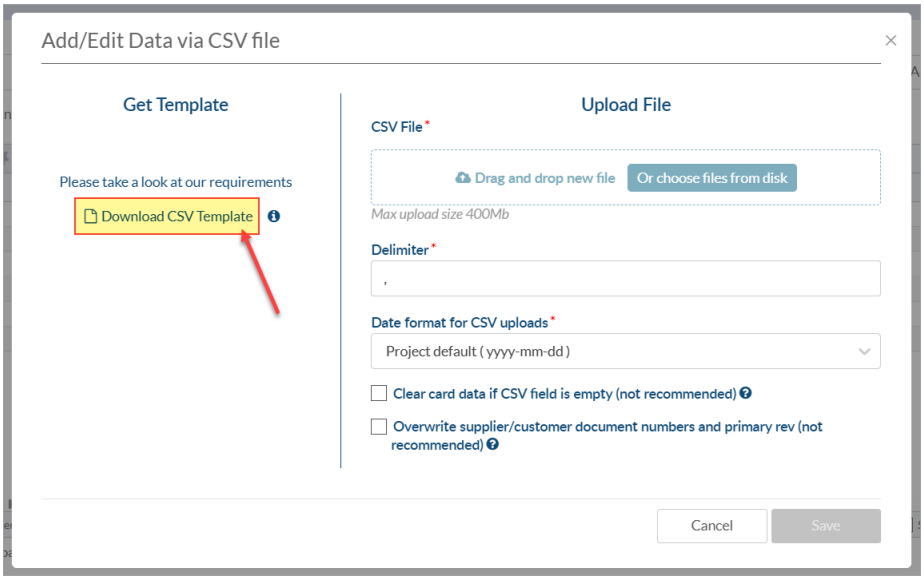


Add/Edit Data via CSV

To begin, expand the options under "More Actions" and choose the option to "Add/Edit Data via CSV".



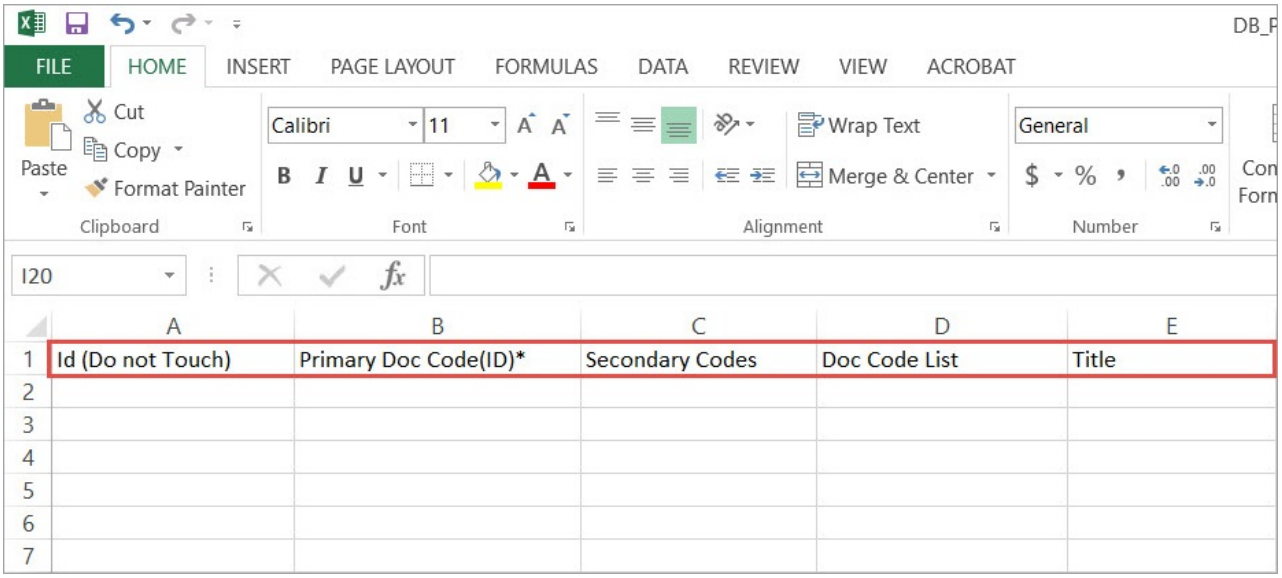
From the pop-up, download the CSV template file. The downloaded file will provide you with the correct column headers and will be populated with any existing data.



There are about 30 columns on the CSV download (*more if you are using custom fields). Below are the descriptions of each column.

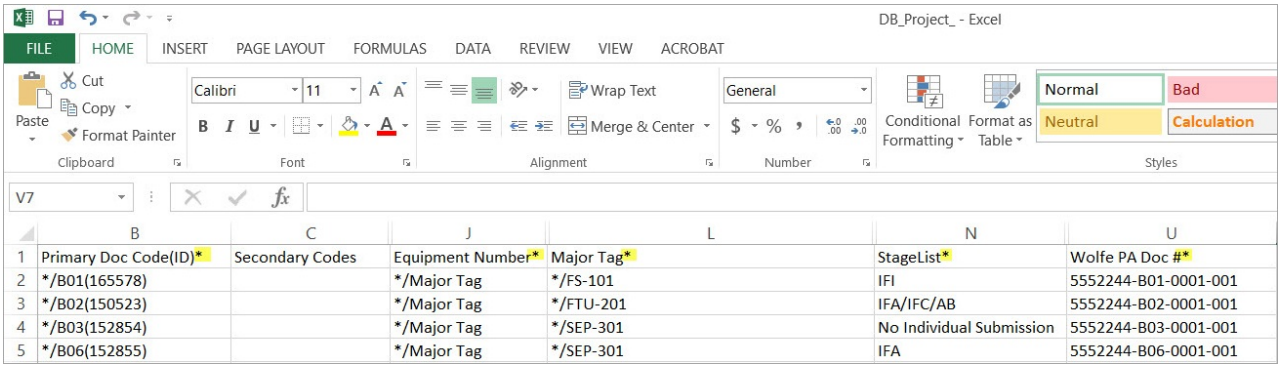
To Note:

- Column headers with the asterisk are required.
- You must include the Primary Doc Code and Doc Code Name, all other columns will default, if desired.
- Existing data that starts with "*/" should not be modified
- If you want DocBoss to autogenerate your document number, enter [generate], include the square brackets, in your document number column.
- To overwrite the default primary revision number, enter [OR*value*] into the cell (where *value* is the new revision number). Alternatively, you can enter the new revision number directly and ensure the overwrite checkbox is marked upon re-upload.



- ID (Do not Touch) - This is the DocBoss internal ID. Do not modify on existing data. You do not need to enter anything for new cards (lines)
- Primary Doc Code(ID)- Do not modify on existing data. The number value in the bracket is the Internal ID of the DocCode. You do not need to enter this UNLESS you have duplicate Doc Codes in your Requirements. To obtain this value, you have to navigate to the Code List (Requirements) grid and Download the CSV Template.

- Secondary Doc Codes - Not required, only enter if applicable - Adding secondary codes can only be added to Manually created cards
- Doc Code List - Do not modify existing data or add any data (this will be auto-populated)
- Title - If you do not add anything this will be populated with the Doc Code Title.

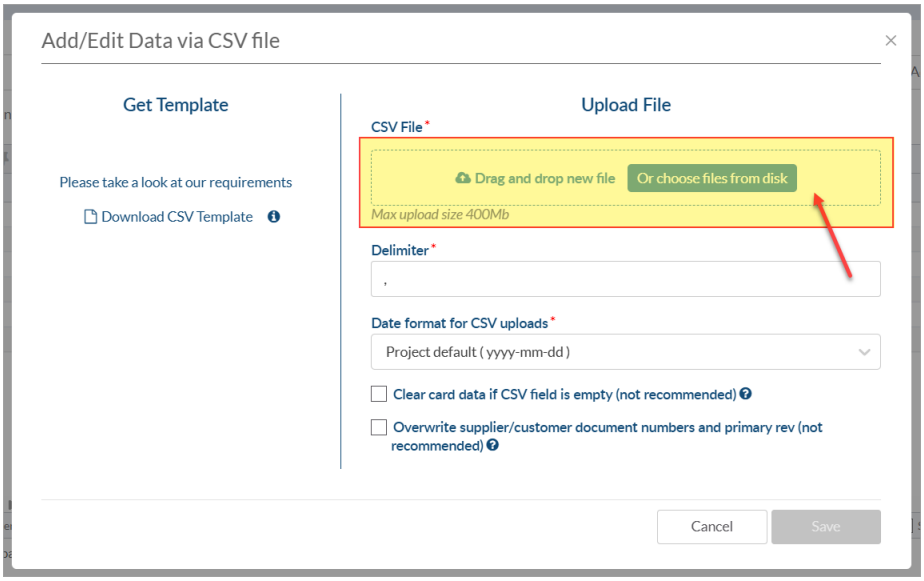


	B	C	J	L	N	U
1	Primary Doc Code(ID)*	Secondary Codes	Equipment Number*	Major Tag*	StageList*	Wolfe PA Doc #*
2	*/B01(165578)		*/Major Tag	*/FS-101	IFI	5552244-B01-0001-001
3	*/B02(150523)		*/Major Tag	*/FTU-201	IFA/IFC/AB	5552244-B02-0001-001
4	*/B03(152854)		*/Major Tag	*/SEP-301	No Individual Submission	5552244-B03-0001-001
5	*/B06(152855)		*/Major Tag	*/SEP-301	IFA	5552244-B06-0001-001

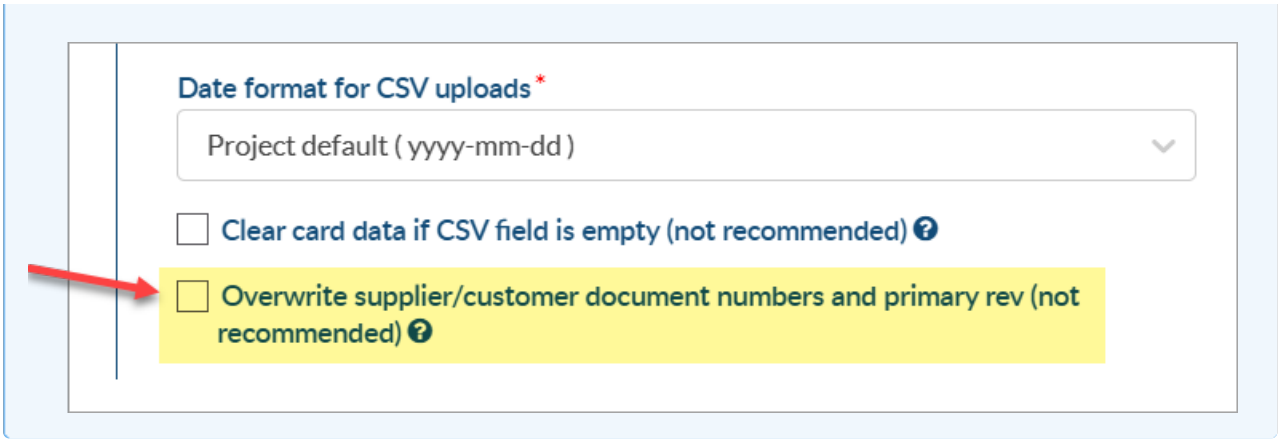
If you already have cards set up on the project they will be populated in the CSV file. Any columns that contain an asterisk in the header are mandatory columns.

- Primary Doc Code(ID)* – The Doc Code the card is linked to
- Secondary Codes – if there are any additional codes it covers - Adding secondary codes can only be added to Manually created cards - the system will ignore any values entered here for auto-generated cards
- Equipment Number* – what is to be displayed as the reference for the card (typically the name of the major tag field)
- Sub Supplier* – The sub-supplier associated with the item
- Major Tag* – The Major Tag value (if multiple separated by a comma)
- StageList* – The Stage List to be applied to the card
- <INSTANCE> Doc #* – The document number

Once all applicable data has been added, save the CSV file and upload it to the same "Add/Edit Data via CSV" pop-up.



Important: If you have replaced an auto-generated 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.


Date format for CSV uploads *
Project default (yyyy-mm-dd)
Clear card data if CSV field is empty (not recommended)
Overwrite supplier/customer document numbers and primary rev (not recommended)