Bulk Processing for Incoming Documents

10/14/2025 3:33 pm MDT

When receiving submittals with many files, users may want to use bulk processing to bring incoming documents into DocBoss. Instead of users individually dragging files into each card, DocBoss can automatically match each file to the appropriate card.

Prepare for bulk processing

Before uploading the files for bulk matching, users should:

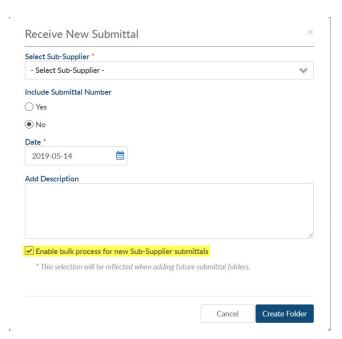
- 1. Ensure they know the return status of the files they are uploading (if applicable).
- 2. Confirm that the file names are formatted so DocBoss can link them to existing cards (see below for instructions).

Bulk matching process

1. Create submittal

Upload the files for bulk processing into DocBoss through the Incoming Documents screen.

Ensure that Enable bulk process for new [Sub-Supplier/Internal/Customer] submittals is checked.



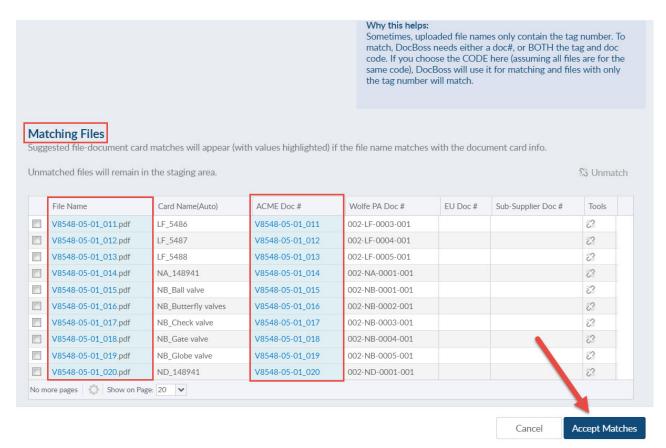
After completing the submittal details, select Create Folder.

2. Review and accept matches

DocBoss will parse the file name and look for matches with existing document numbers. The results are shown in the pop-up below.

Matching Uploaded Files to Document Cards

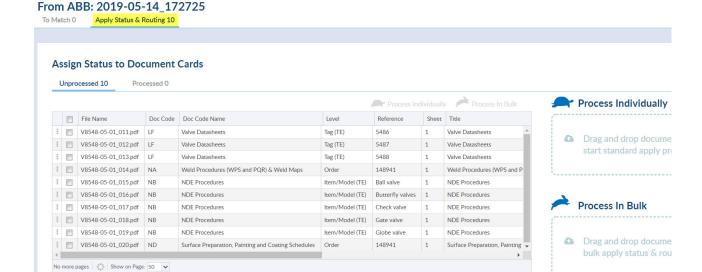




After reviewing the matches to ensure they are correct, select Accept Matches from the bottom right of the grid.

3. Apply status and routing

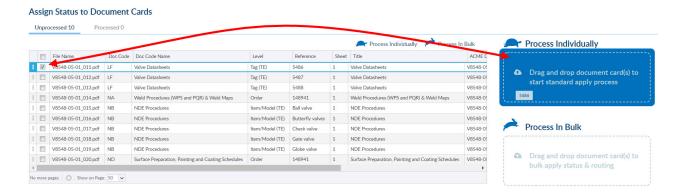
Cards In/Out / Incoming Documents



Once the files have been matched to the appropriate cards, they will need to be assigned statuses and routing will need to be defined. Processing the files can either be done (a) individually OR (b) in bulk.

4a. Process individually

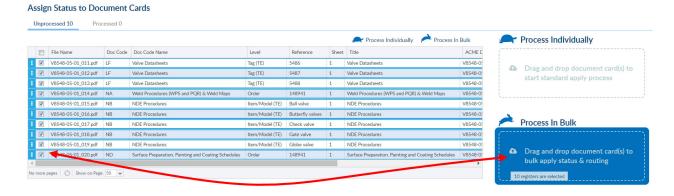
- 1. Select the applicable card from the grid
- 2. Drag and drop the cards into the "Process Individually" box



Fill out the necessary information for each document and save.

4b. Process In bulk

- 1. Select multiple cards from the grid
- 2. Drag and drop the cards into the "Process In Bulk" box

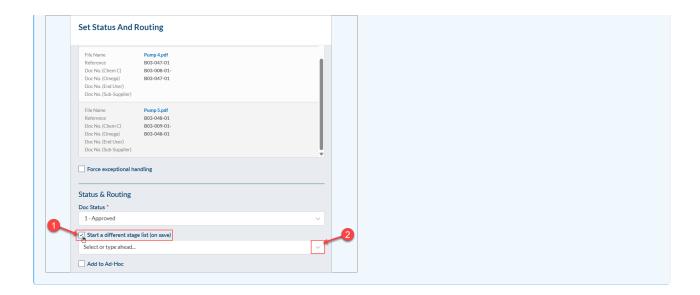


The same status (and routing) can be applied to the selected group of cards simultaneously.

Once you have assigned details to all files, the grid will be empty and the submittal will be marked complete.



If processing documents that are returned with a complete status, a new stage list can be started. This is useful in cases where there are no further stages in the current stage list, but additional workflow is required after stage completion.



Formatting file names for bulk processing

When trying to match your file with an existing card, DocBoss takes

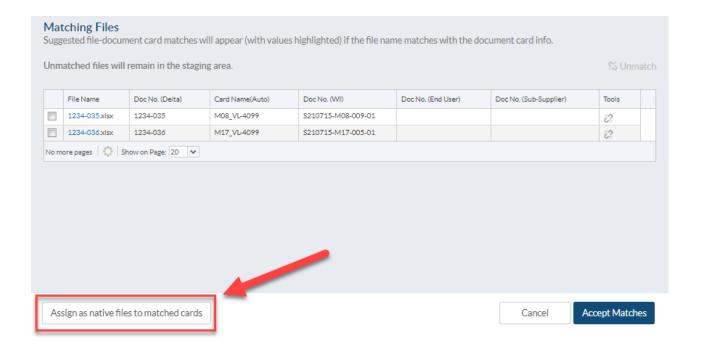
- 1. Each segment of your file name (based on your split parameter)
- 2. The full file name

and compares it to

- 1. Each document number (internal, sub-supplier, customer, end user).
- 2. Card Name (Auto) which is always "code_reference" (e.g. "D01_TT-101")
- 3. The reference field **BUT user MUST select the doc code in the match box (if more than one code uses the same reference).

Bulk process native files

To bulk process native/secondary files, match the files as usual, and then select "Assign as Native Files to Matched Cards".





If looking to process both primary and native files in bulk, see the following article: Assign Primary and Native Files in Bulk.