Bulk Processing for Incoming Documents

09/28/2026 8:57 am 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:

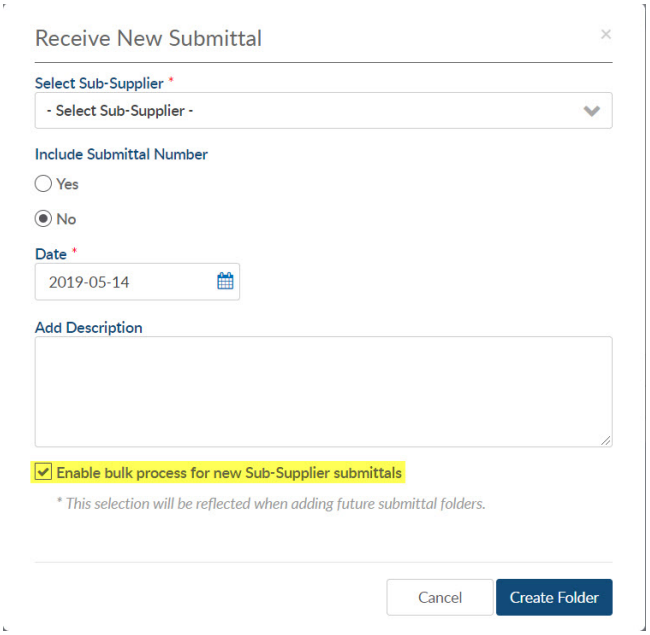
1. Ensure they know the return status of the files they are uploading (if applicable).
2. Confirm that the file names are formatted so DocBoss can link them to existing cards (see below for instructions).

Bulk matching process

1. Create submittal

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

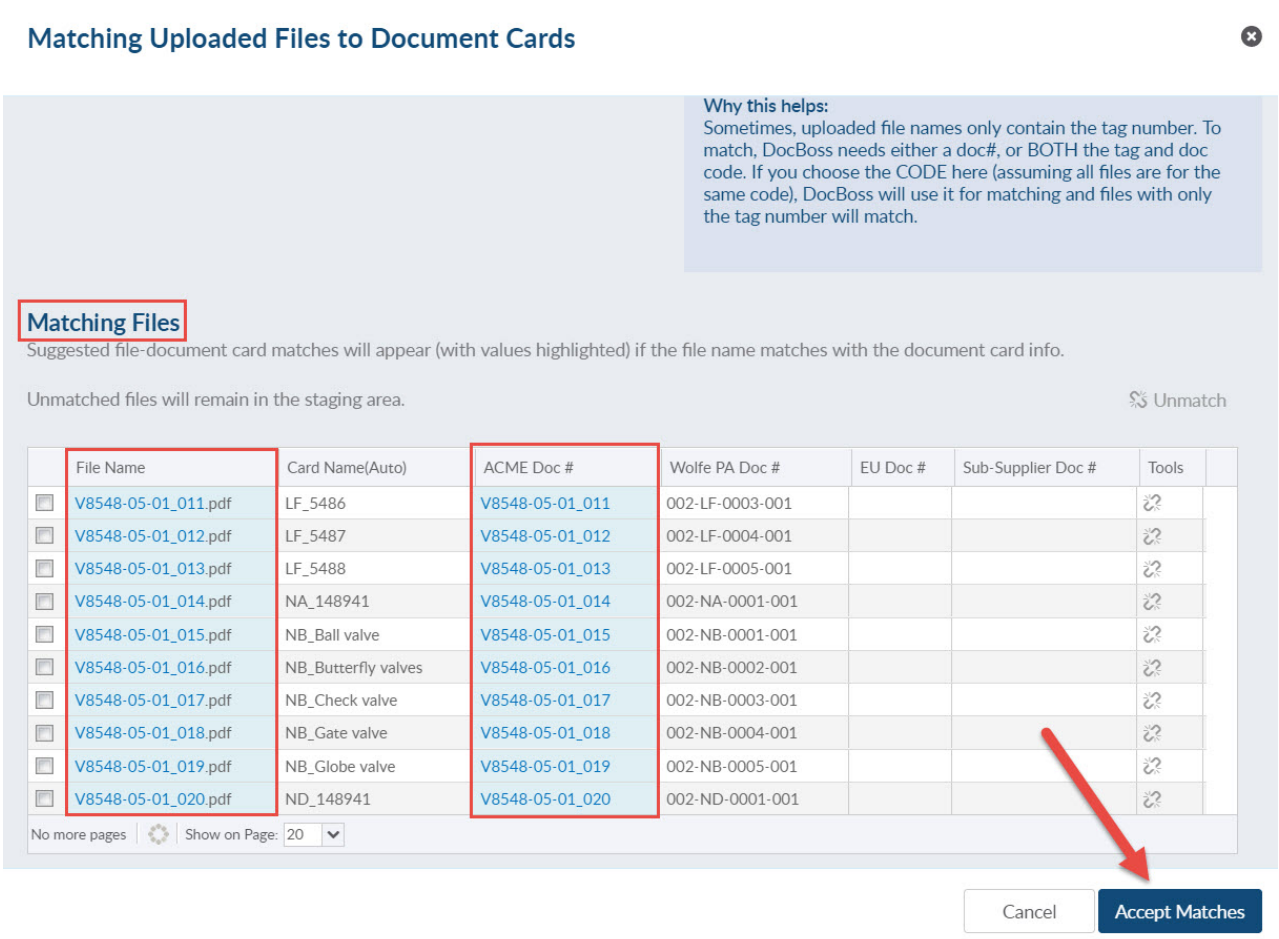
Ensure that **Enable bulk process for new [Sub-Supplier/Internal/Customer] submittals** is checked.



After completing the submittal details, select **Create Folder**.

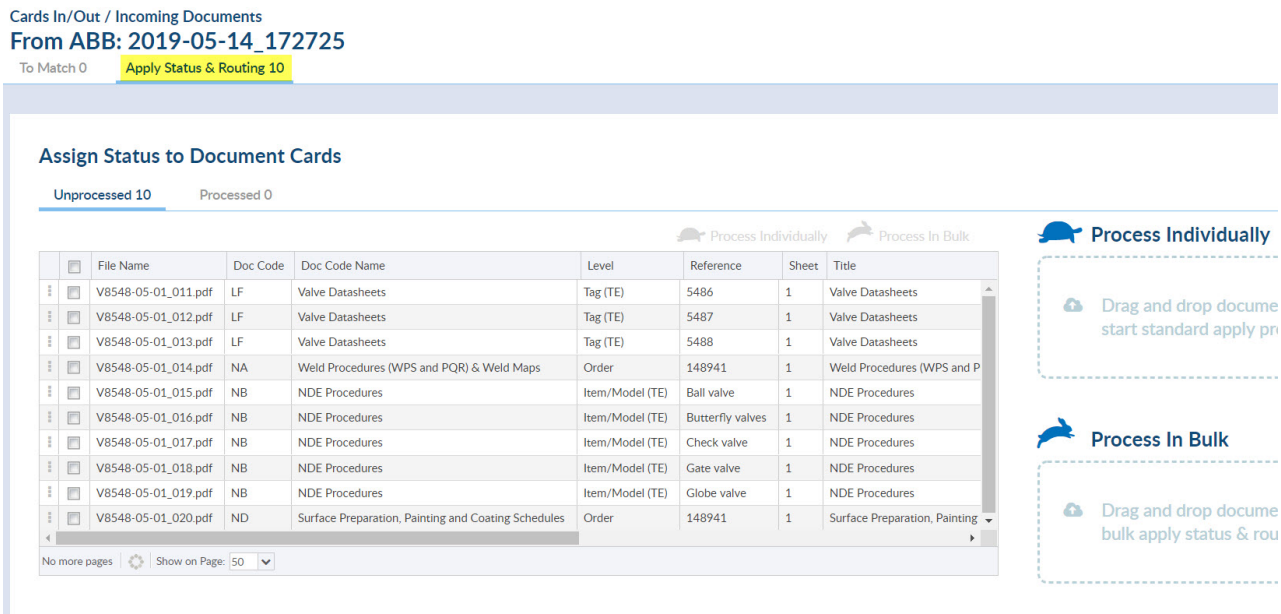
2. Review and accept matches

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



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

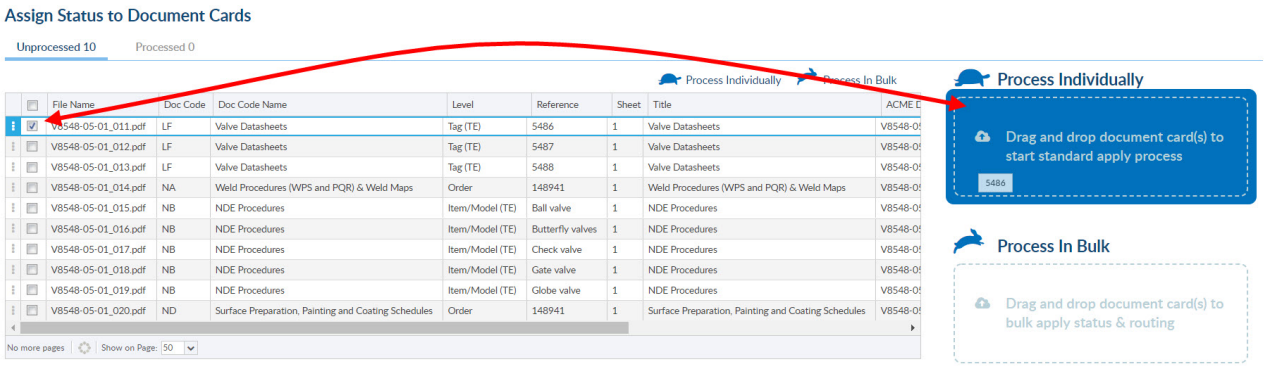
3. Apply status and routing



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

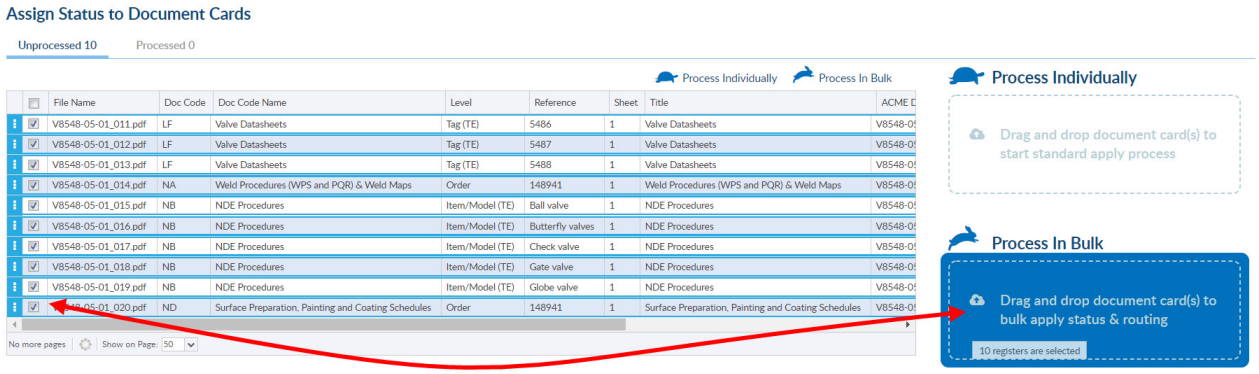
1. Select the applicable card from the grid
2. Drag and drop the cards into the "Process Individually" box



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

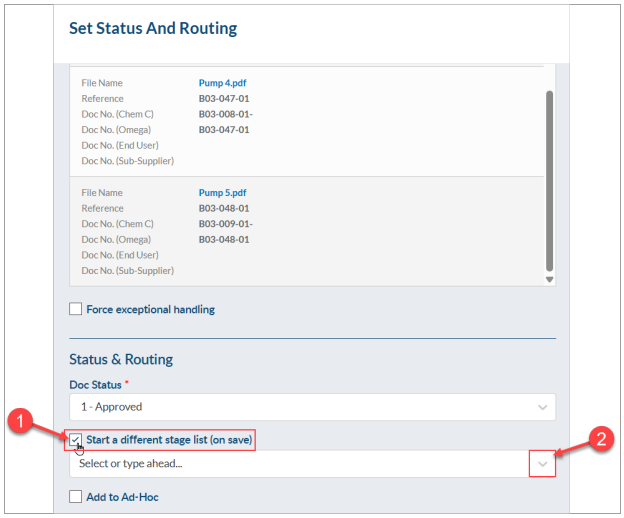


The same status (and routing) can be applied to the selected group of cards simultaneously.

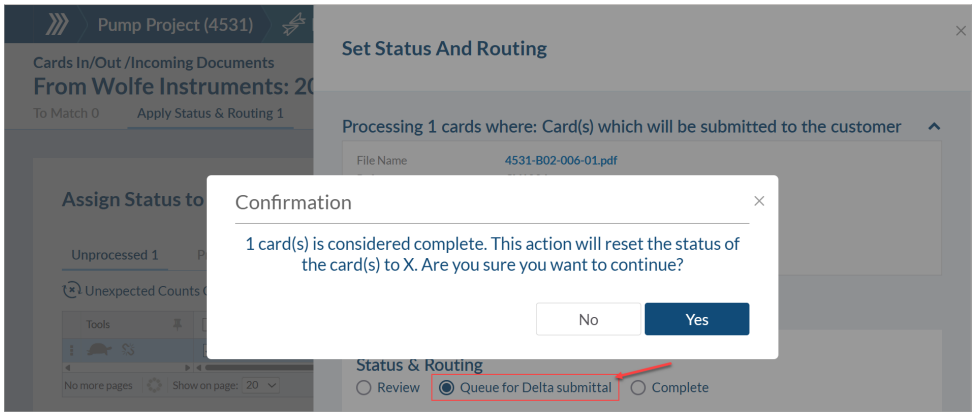
Once you have assigned details to all files, the grid will be empty and the submittal will be marked complete.

Bulk process - additional details:

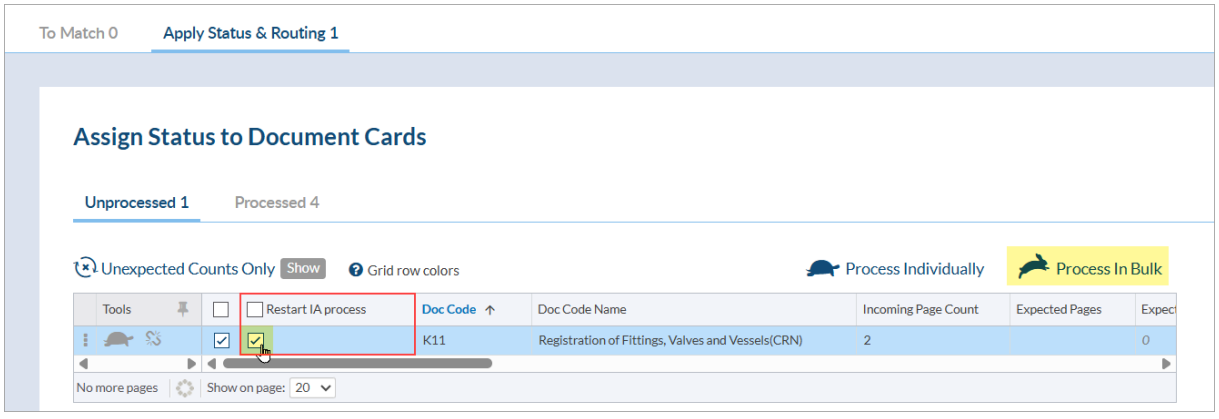
1. If processing documents that are returned with a complete status, a new stage list can be started. This is useful in cases where there are no further stages in the current stage list, but additional workflow is required after stage completion.



2. If a document is matched to a card which is already considered complete (return status = Approved / system completed (Z)), you can queue the new document submittal via bulk process by selecting the "Queue for [*Customer*] submittal" option under "Status & Routing". A pop-up will appear to confirm that you would like to reset the status to "X".



3. If documents have undergone internal approval and the IA process needs to be restarted, check the "Restart IA process" box on the applicable documents before bulk processing. This check box will only be available for cards which already have an approved IA status applied.

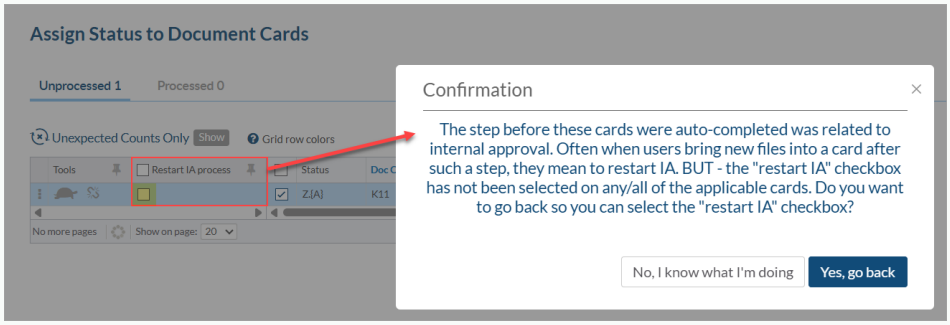


4. If documents have been uploaded o

Example: A set of cards underwent internal approval (all receiving an "approved" status) and were submitted to the source with no return expected, resulting in status Z.{A}. The documents were **unexpectedly returned**, and a new internal approval cycle needs to be started to prompt the review

of these documents. The documents are brought in via Incoming Documents and are bulk matched to the applicable cards. The box to "Restart IA process" is checked for each card, and the cards are then processed in bulk.

**Note: In this case, because the cards were auto-completed in relation to the internal approval process, DocBoss expects that internal approval should be restarted upon return. As such, a pop-up will appear to remind you to check the "Restart IA process" box before bulk processing (if/when there are cards in Z{A} status that do not have this box checked).*



Formatting file names for bulk processing

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

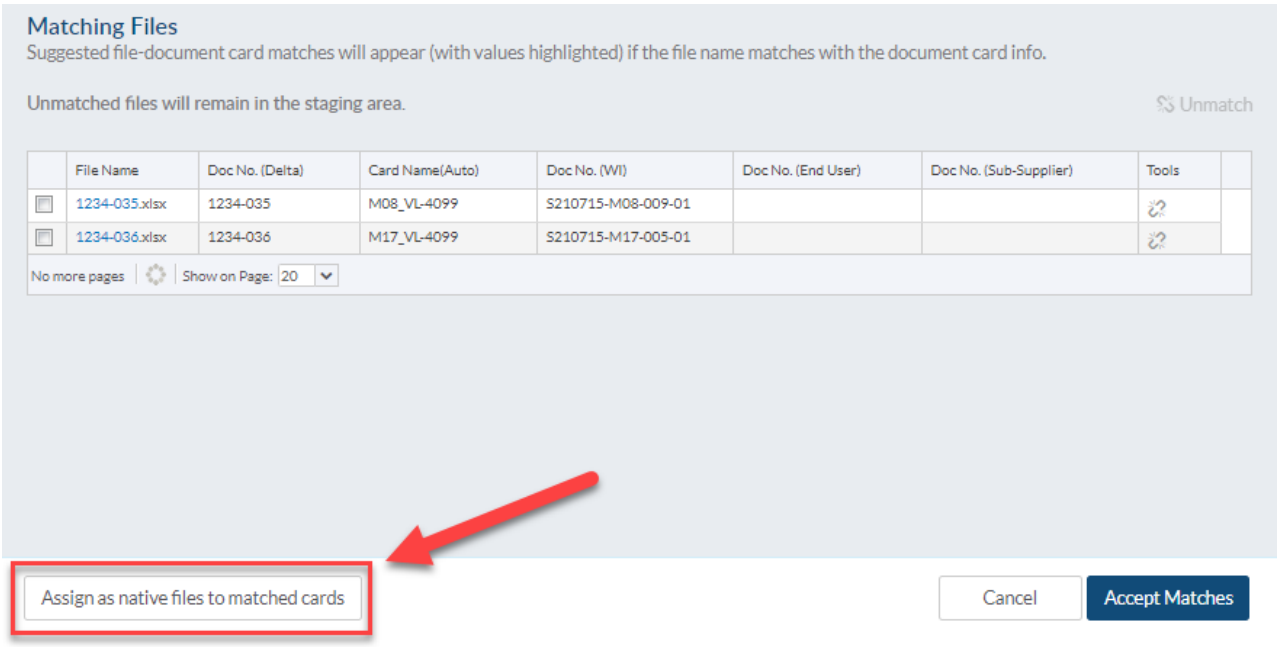
1. Each segment of your file name (based on your split parameter)
2. The full file name

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.