Auto-Reclaim Submittal

09/28/2026 9:00 am MDT

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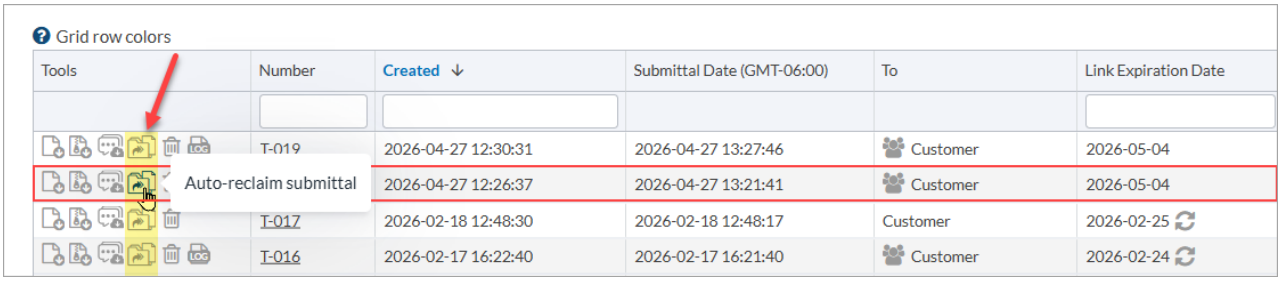
The Auto-Reclaim feature allows users to complete the status of a document without uploading a new file. This is useful in situations where the customer approves a transmittal verbally or by email, but doesn't physically return the original transmittal or documents. Rather than re-upload all of the original docs (to maintain the workflow trail), users can click Auto-Reclaim Submittal, and work with the documents inside DocBoss. This process can also be used when a submittal is rejected, but a record trail is needed.

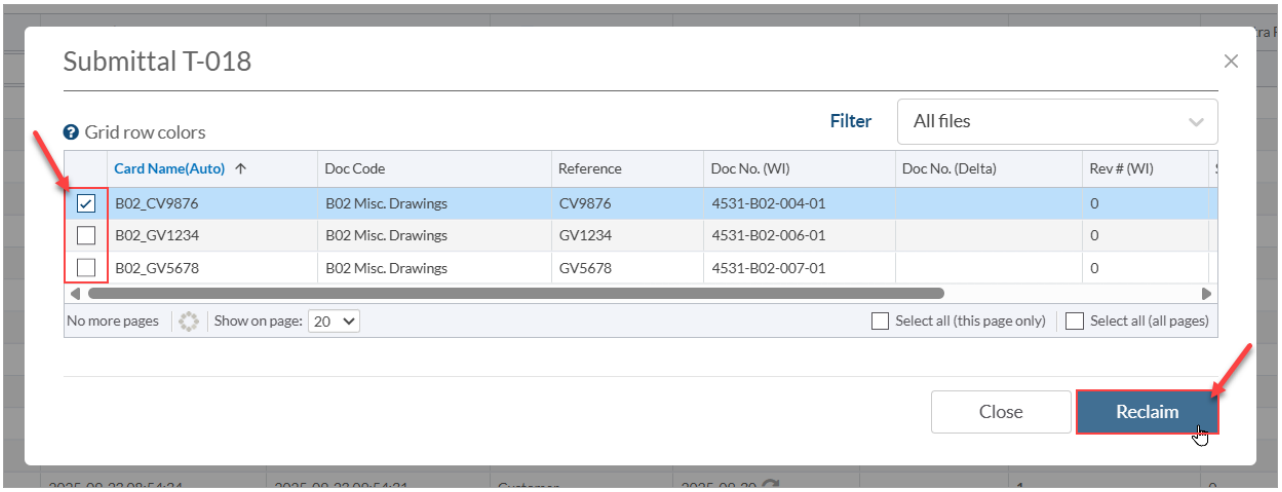
Auto-reclaim files

To begin auto-reclaiming files, navigate to **Project Menu > Outgoing Submittals** and expand the "Submittals" section.

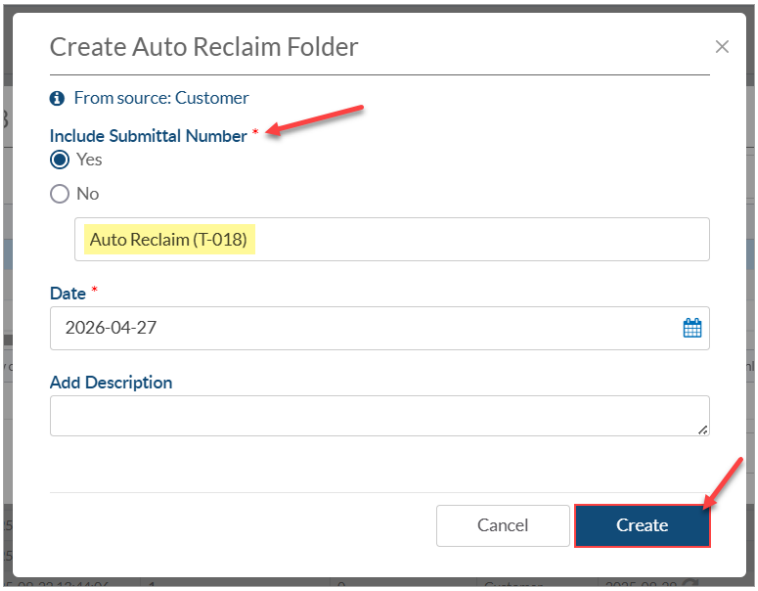
Select the "Auto-reclaim submittal" icon from the "Tools" column for the submittal containing the documents to be reclaimed.



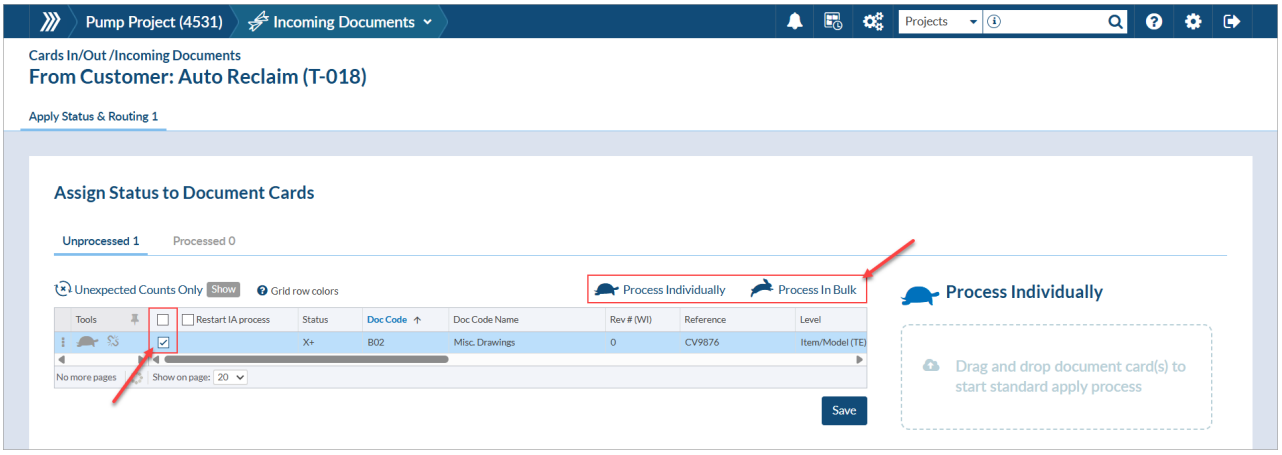
In the pop up screen, select the applicable documents and then click **Reclaim**.



A new incoming submittal (source set as the submittal target) will be created using the outgoing submittal number and the prefix "Auto Reclaim". This incoming submittal number can be modified, or you can choose to not record a submittal number. Then, click "Create".

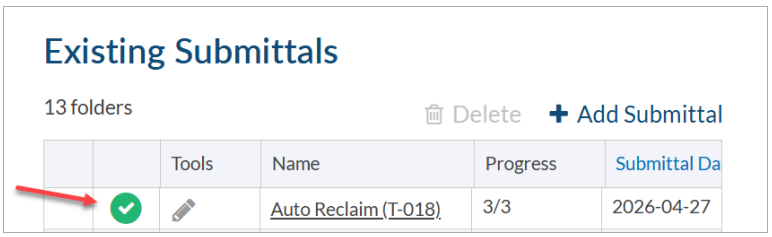


You will be redirected to the **Incoming Documents > Apply Status & Routing** screen. From here, select the document(s) to be processed, and choose whether to process individually (if different status and/or routing for each document) or in bulk (for documents to which the same status and routing will be applied). Then, process the document(s) as usual (i.e., apply the appropriate status, add internal routing (if required), etc.).



After all documents selected for auto-reclaim have been processed, a popup message will appear advising this, and the **Unprocessed** grid will not show any cards. The auto-reclaim process is complete.

To return to the auto-reclaimed submittal in the future, navigate to **Project Menu > Cards In/Out > Incoming Documents** and select the submittal from **Files from [*Customer*] > Existing Submittals**.



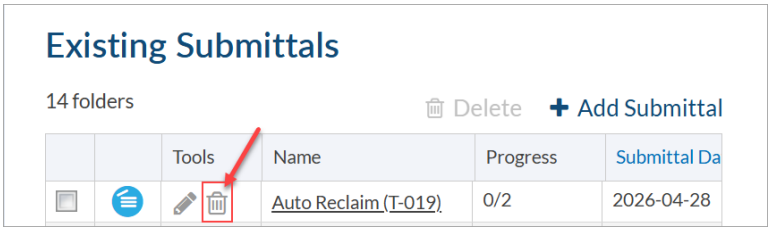
Revert auto-reclaim

If an auto-reclaimed submittal needs to be reverted, this can be achieved at any point in the process. However, the earlier on in the process, the better!

From auto-reclaim folder

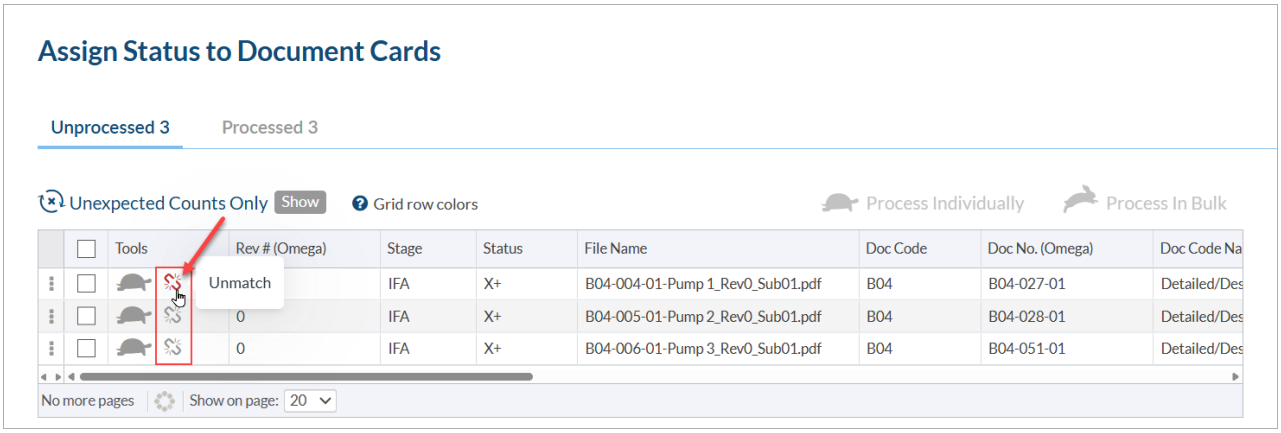
No files processed

If the auto-reclaim folder has been created but no files have been processed, the auto-reclaim folder can simply be deleted. To do this, navigate to **Project Menu > Incoming Documents** and find the submittal in the grid. Under the "Tools" column, select the delete button.



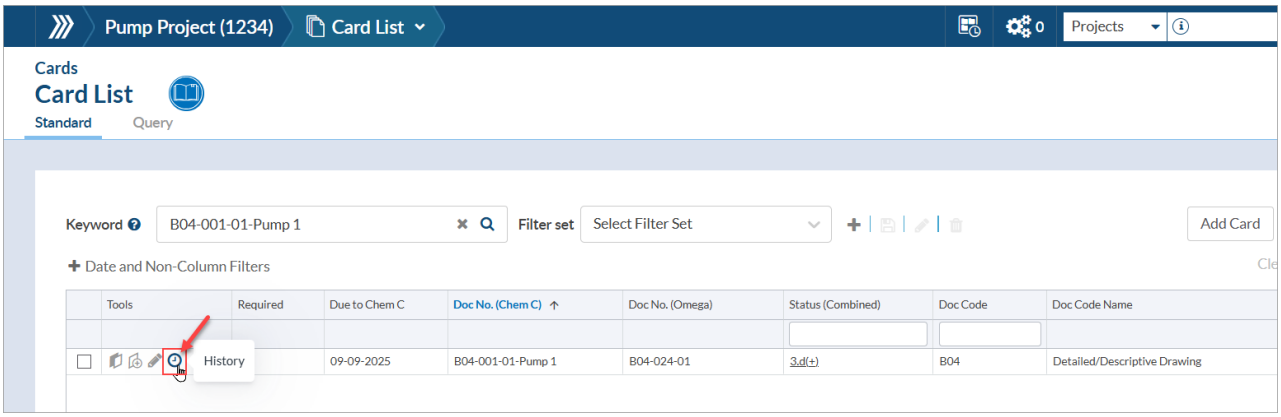
Some files processed

If the auto-reclaim folder has been created and only **some** files have been processed, the unprocessed files can be removed from the auto-reclaim folder. To do this, navigate to **Project Menu > Incoming Documents** and open the auto-reclaim submittal. Under the "Unprocessed" tab, click the "Unmatch" icon under "Tools" for each file.



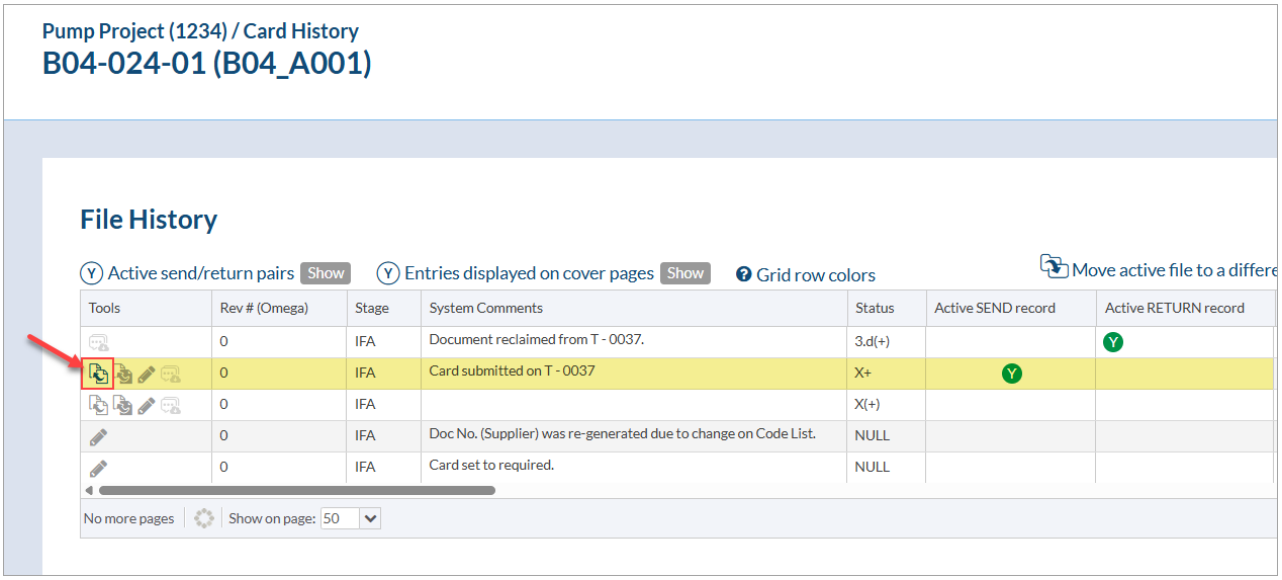
From card history

Files that have already been processed can be reverted by navigating to the card list and opening the card history (via the clock icon under "Tools") for the cards(s) in question.



Once on the card history screen, find the history entry for the **most recent** submittal and click the "Revert file and

meta-data" option under "Tools"



If history is reverted, the option to use auto-reclaim will not be available for this card when a return status is received. In this case, the files will need uploaded via Incoming Documents. If your customer does not return the files, simply download the original submittal and upload those same files to the "Customer" drop box via Incoming Documents.