Upload Documents

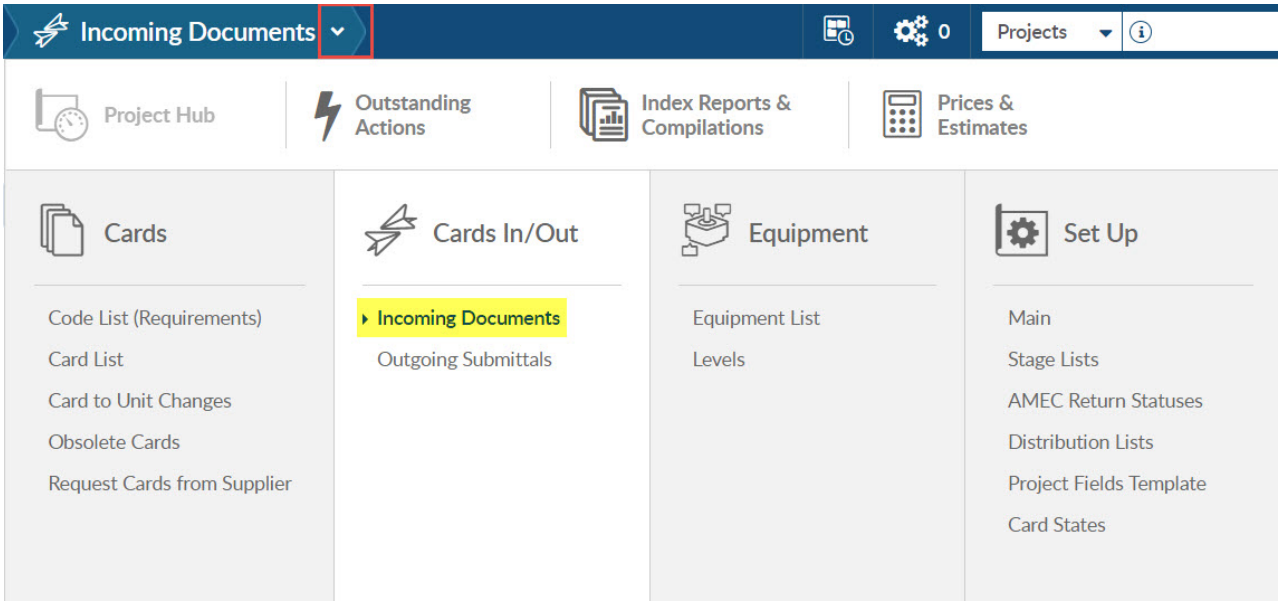
09/10/2026 12:34 pm MDT

Where do I upload files or documents?

You can upload all documents to DocBoss through your Incoming Docs Dashboard.

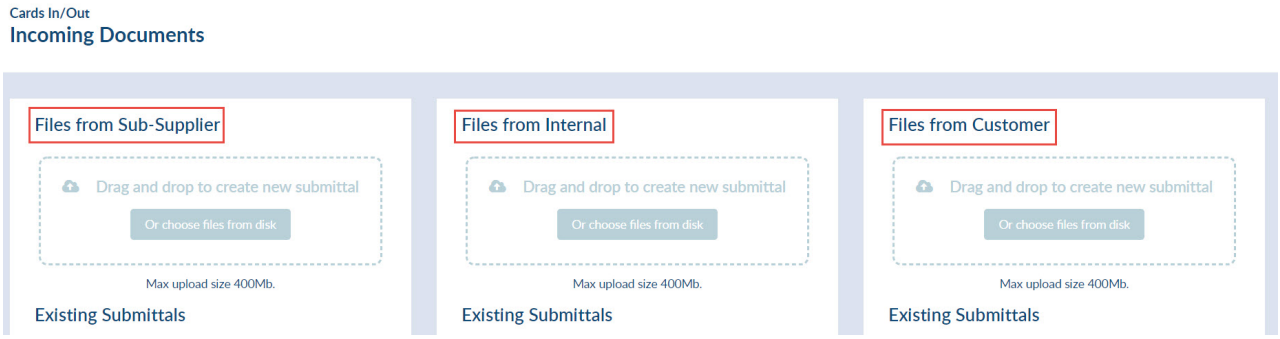
To Get Here:

1. *Incoming Docs Dashboard*



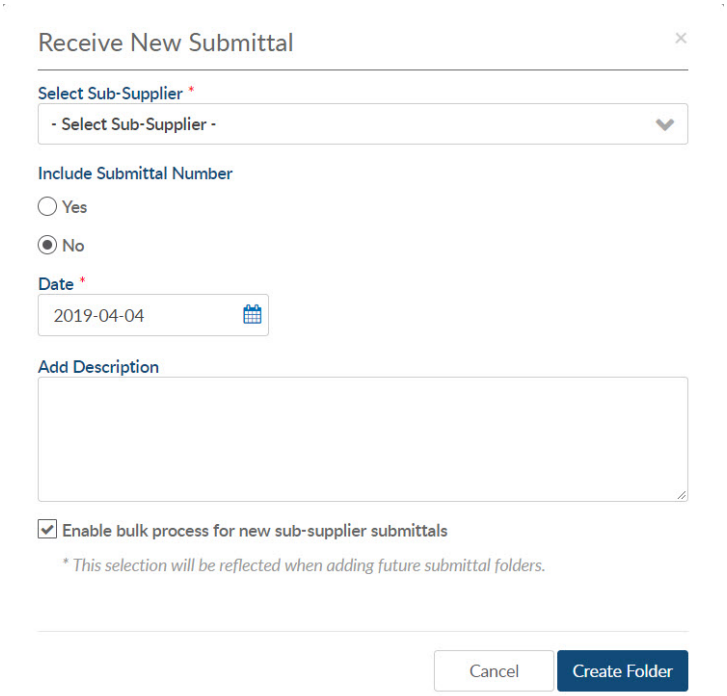
When you first get here let's ask - where did these documents come from?

The answer dictates the appropriate drop zone.



Once dropped you will be required to enter some detail about the Submittal you are receiving. *You can drag an entire zip file into DocBoss, and it will extract individual files. You **can not** drag individual documents from a zip folder. If you want to upload individual files originating in a zip folder, you must save them to your PC first.

Note - if you do not want DocBoss to extract/unpack the zip folder and upload the zip file as-is, you must drag and drop the zip folder directly onto the card in the "File in Secondary File Format" area, via the card list. For more details, see our article here.



- ***If files from Sub-Supplier - Select Sub-supplier**: You will be able to select a the Sub-supplier that submitted those files from this dropdown.
- **Include submittal number**: Select Yes or No
    - If yes - you can add your submittal number here. If the source has provided a transmittal number (when documents were sent to you) it is ideal to use it, if nothing has been provided we suggest using the date.
- **Date**: any date can be used. Typical dates – 1. Date transmittal was provided or 2. If not from a specific transmittal then date that files are uploaded to DocBoss.
- **Description**: Any other relevant information to include in this Submittal folder.

Once complete, a submittal folder is created and the files are uploaded. Now you are ready to assign the documents to the document cards.

** Click here for info on assigning the uploaded documents to cards **

For more information about incoming files have a look at our video: Upload Documents to DocBoss.