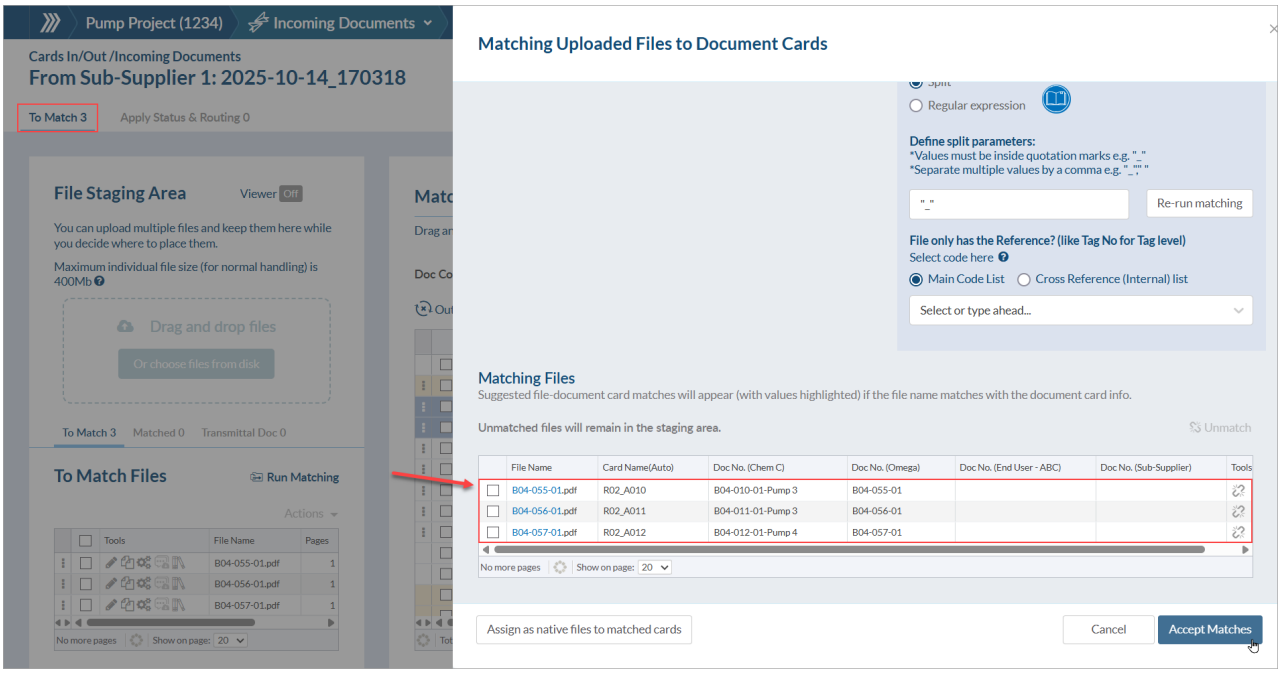
Assign Primary and Native Files in Bulk

10/14/2025 3:28 pm MDT

If receiving both primary and native files, the files can be assigned and processed in bulk using a "batching" method. Follow the steps below to get started:

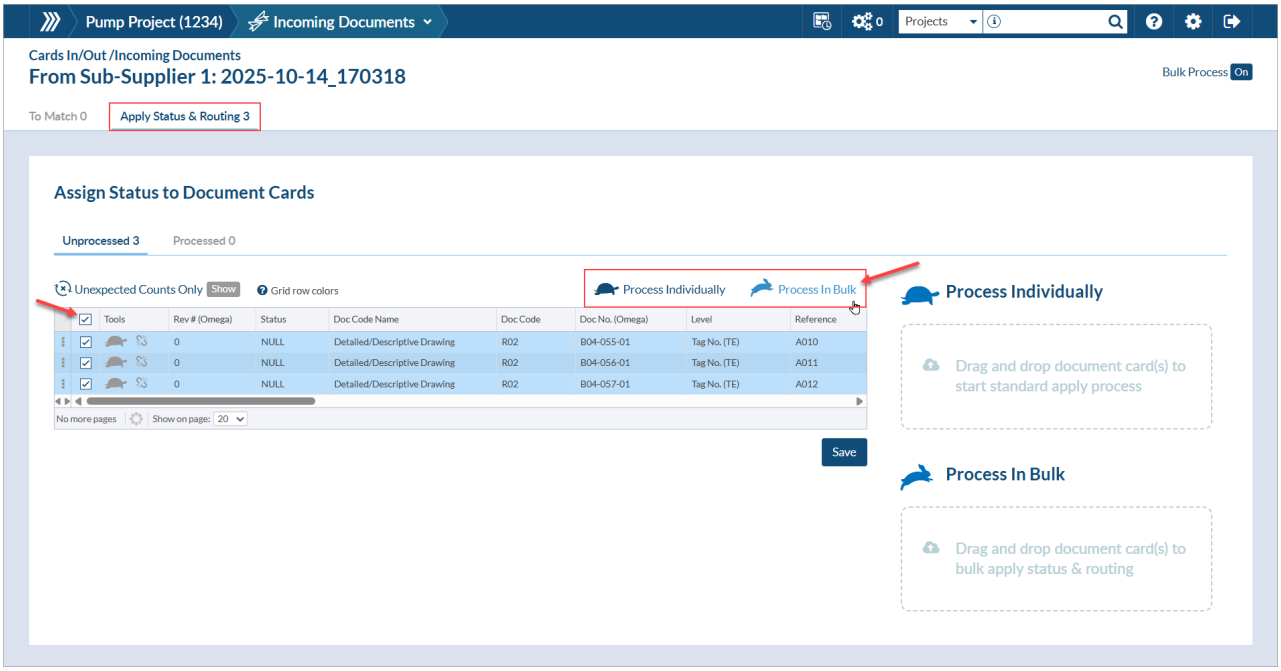
1. Upload and match primary files

To start the process, upload the primary files to the appropriate drop zone (e.g., sub-supplier). Once the files are uploaded, run bulk matching to assign the files to their corresponding cards.

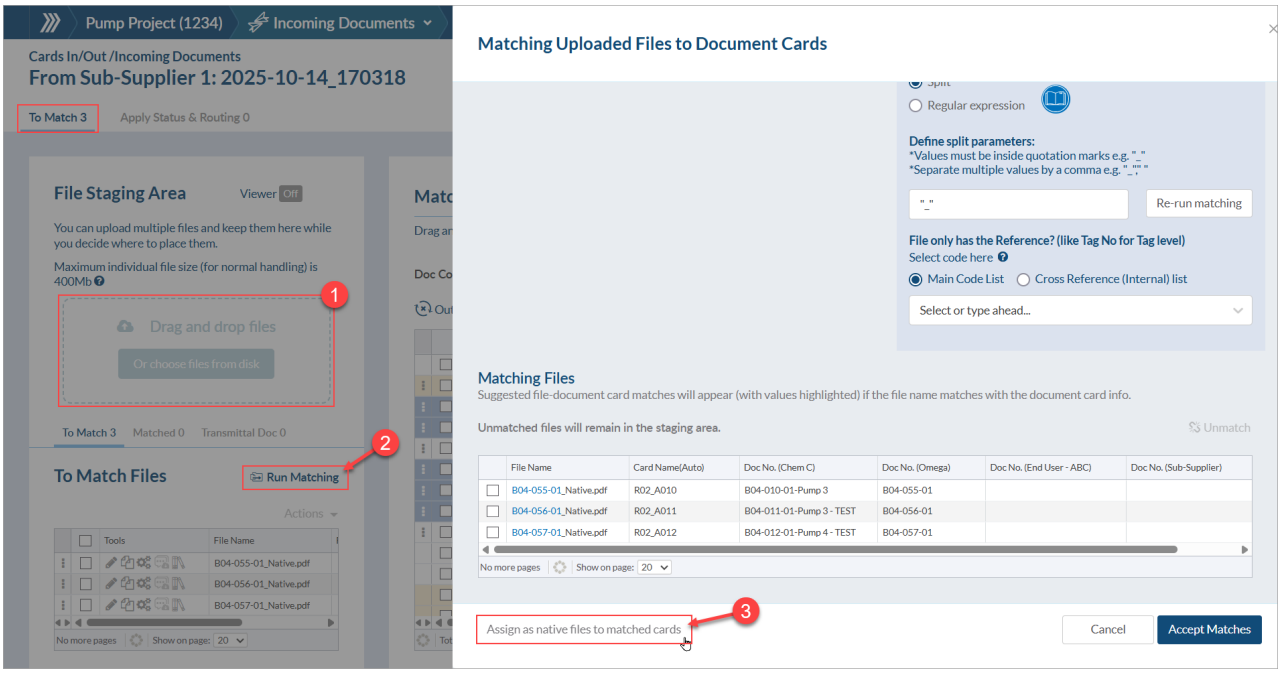


2. Process primary files

Once the files have been matched, accept the matches and navigate to the "Apply Status & Routing" tab to begin processing. Process these files as-needed (either individually or in bulk).



The primary files must first be processed **before** attempting to match the native files. If the primary files are matched but not processed, the native files will not successfully match to cards (due to unprocessed files already being matched to the cards).

3. Upload and match native files

Return to the "To Match" tab and upload the native files to the same submittal (via the File Staging Area). Once the files are uploaded, run bulk matching again by selecting the "Run Matching" button. Once the files have been matched, select the option to "Assign as native files to matched cards".