

Bulk Match Troubleshooting

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When attempting to bulk match files to their corresponding cards, there are four types of errors that prevent successfully matching: (1) file doesn't match any active (required) cards, (2) file has more than one active (required) card that is a possible match, (3) more than one file matches the same card, or (4) file matches a card that is awaiting processing.

There are multiple possible solutions to each error depending on the cause, and each scenario is discussed below.

1. File doesn't match any active (required) cards

Scenario 1: Card exists, but file name is preventing match

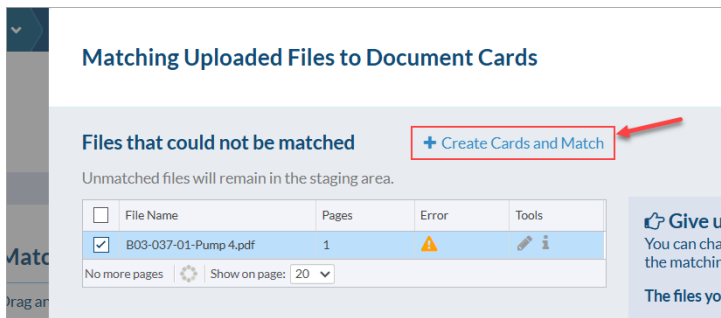
- **Solution A:** Update the split parameter
 - If the file name includes a piece of unique information, adjusting the split parameter will separate the file name in a way that DocBoss can identify. See this article for more information: [Understanding the Split Parameter in Bulk Matching Process](#).
 - Note: There are cases where updating the split parameter will not be sufficient and a regular expression should be used instead. See this article for more information: [Using Regular Expressions](#).
- **Solution B:** Update the file name to work with existing split parameter
 - If the file name needs to be adjusted to function with the existing split parameter (e.g., updating "-" to "_"), click the pencil icon under "Tools" to update the file name. See this article for file naming guidelines: [Bulk Processing for Incoming Documents](#).

The screenshot shows the 'Matching Uploaded Files to Document Cards' interface. It features a table of files that could not be matched, with columns for File Name, Pages, Error, and Tools. A red box highlights the 'Tools' column for the first row, which contains a pencil icon and the word 'Edit'. Below the table, there is a 'Give unmatched files another chance' section with radio buttons for 'Split' (selected) and 'Regular expression'. A 'Re-run matching' button is also visible.

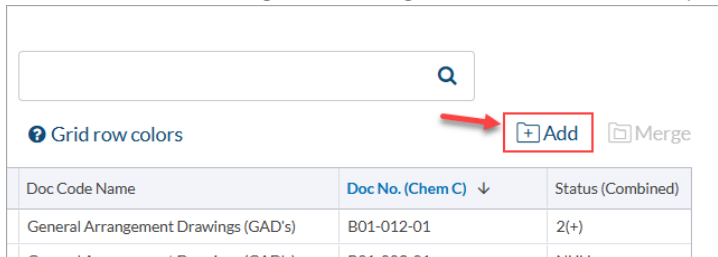
File Name	Pages	Error	Tools
B03-037-01.pdf	1	⚠	Edit
B03-038-01.pdf	1	⚠	

Scenario 2: Card does not exist

- **Solution A:** Create manual card directly from the submittal
 - If a new card is required, a card can be created directly from the bulk match form by selecting the file from the unmatched grid and clicking the "+ Create Cards and Match" button. See this article for more information: [Create Cards and Match](#).



- Note: A new card can also be created from the individual assignment screen by clicking the "Add" button (above card list grid), creating the card, and individually assigning the file to the new card.

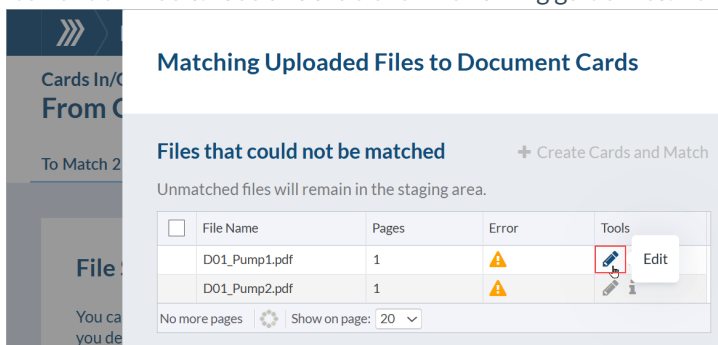


- **Solution B:** Create manual card from the card list
 - If a new card is required and you'd prefer to create them before matching, return to the card list and add the necessary manual card.
 - See these articles for more information:
 - [Create Manual Cards \(Individual\)](#)
 - [Create Manual Cards \(Bulk\)](#)

2. File has more than one active (required) card

Scenario 1: Multiple cards identified as potential matches

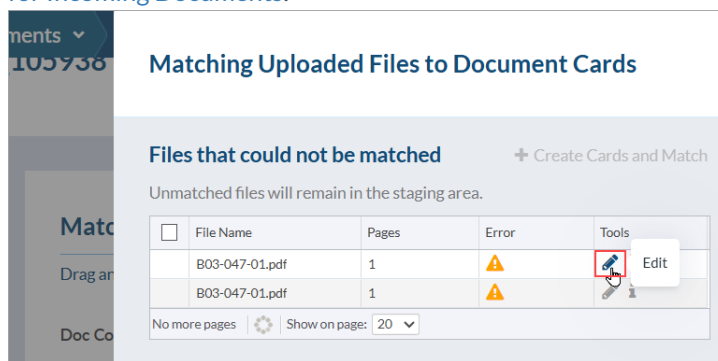
- **Solution A:** Update the split parameter
 - If the file name includes a piece of unique information, adjusting the split parameter will separate the file name in a way that DocBoss can identify. See this article for more information: [Understanding the Split Parameter in Bulk Matching Process](#).
 - Note: There are cases where updating the split parameter will not be sufficient and a regular expression should be used instead. See this article for more information: [Using Regular Expressions](#).
- **Solution B:** Update the file names to include unique identifier
 - If the file names do not include a unique identifier (see [details](#)), update the file name using the pencil icon under "Tools." See this article for file naming guidelines: [Bulk Processing for Incoming Documents](#).



3. More than one file matches the same card

Scenario 1: Multiple files in submittal with the same/similar names

- **Solution A:** Update the split parameter
 - If multiple files have similar names but already include a piece of unique information, adjusting the split parameter will separate the file name in a way that DocBoss can identify. See this article for more information: [Understanding the Split Parameter in Bulk Matching Process](#).
 - Note: There are cases where updating the split parameter will not be sufficient and a regular expression should be used instead. See this article for more information: [Using Regular Expressions](#).
- **Solution B:** Update the file names to make them unique
 - If multiple files have the exact same name (not unique), update the file names using the pencil icon under "Tools" to include a unique identifier. See this article for file naming guidelines: [Bulk Processing for Incoming Documents](#).



- **Solution C:** Process files in "batches"
 - If bulk matching both primary and native files, upload the files in "batches" instead of all together.
 - See this article for more information: [Assign Primary and Native Files in Bulk](#).

4. File matches a card that is awaiting processing

Scenario 1: Files matched but not processed in a different submittal

- **Solution A:** Process files in another submittal
 - If a file was returned, matched, but not processed in a different submittal, review previous incoming submittals to identify where this occurred. Once identified, navigate to the "Apply Status & Routing" tab to complete processing.
 - See this article for more information: [Bulk Processing for Incoming Documents](#).

Scenario 2: Files matched but not processed in the same submittal

- **Solution A:** Process files in same submittal
 - If using the "batching" method to bulk process primary and native files, first complete processing of the primary files **before** uploading and matching the native files.
 - See this article for more information: [Assign Primary and Native Files in Bulk](#).