Working with Sub-Suppliers

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When working with sub-suppliers, there are several options that can be enabled for DocBoss to help identify which documents belong to each sub-supplier and to make submittals and expediting easier.

Sub-Supplier List

When using auto-generated cards, each card has a set of equipment linked to it. DocBoss will look up the sub-suppliers on the linked equipment and use it to define the sub-supplier list.

If needed, these values can be changed by selecting the applicable sub-supplier in "Sub-Supplier Override" column. For more information, see this article: Sub-Supplier List and the Sub-Supplier Override.

Sub-Supplier Portal

The sub-supplier portal provides a secure location for your vendors to upload documents directly into your DocBoss projects, reducing email communication and ensuring traceability of sent and received documents. Sub-suppliers can also download submittals from the portal.

To begin using the sub-supplier portal, follow the steps in this article: Sub-Supplier Portal (Admin)

To see the sub-supplier view of the portal, and to read instructions for sub-suppliers, see this article: Sub-Supplier Portal (Supplier View).

> 🔔 To use the sub-supplier portal, the sub-supplier must be (1) added to your system, (2) granted access to the project, and (3) added to **at least** one piece of tagged equipment OR a document must have the sub-supplier set in the override field. See this article for more information: Sub-Supplier Portal (Admin).

Expediting

The Expediting module can be used to send reminders to sub-suppliers about coming due and overdue documents that are expected from them. It can be also used to notify them about documents required to be submitted at the beginning of the Project.

This can be set by enabling the checkbox for "Expedite NULL cards":

If enabled, when expediting emails are sent to the sub-suppliers, the system will include only the applicable documents (as per the sub-suppliers selected in the Card List) in each notification.

The Expediting module can be set up by following the steps from these articles:
- Enable Expediting for a Project
- Configure Expedite Reports
- Run the Expedite Process and Send Emails