How can I recreate external submittal history?

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There are times when a project has been started outside of DocBoss, and you want all submittal history to be brought into the system. Maybe you just enrolled with DocBoss and have a large project just underway.
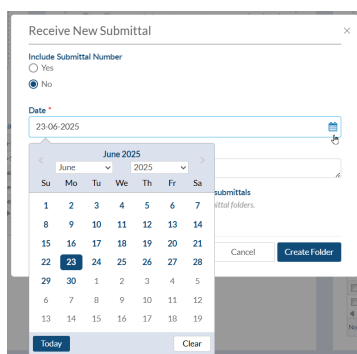
It is possible to recreate your submittal history by back-dating submittals - both incoming and outgoing.

The Best Way to Start

Our suggestion is to recreate each submittal as it happened on your calendar (as if you were re-living the project). You likely received, then sent, then received then sent. Don't execute all of the received's first - it will throw errors on your cards (DocBoss will tell you that you should be getting something back before re-uploading a new file), and it will mess up the send/return pairings. Do do them in date order, keeping the in/outs in the same order that you actual executed the process.

The Process

When you upload files (incoming from internal), you can set a date on the folder. This is used as the incoming submittal date.

This is also possible when you are creating submittals (change the submittal date). By default, the submittal date will reflect the actual date, but this can be manually modified to reflect a different date. After making the submittal, both the created date and submittal date will be displayed in the submittal history, but the **submittal date** will be used on outputs.

You can either use legitimate files, or just placeholder pdfs to assign files into the cards, and make the submittals. These "old" submittals can then be displayed in the cover page history of future submittals.

It also lets the statuses flow correctly

i.e.

2022-07-01 cards a,b,c in from internal

2022-07-01 cards a,b,c out to customer (statuses recorded)

2022-07-02 card c back from customer (statuses recorded)

2022-07-02 card c out to internal (don't need to record the OUT to internal/suppliers unless you want - most just record to/from customer, but you do need to create the incoming submittal from internal to have files to send out).

2022-07-03 cards c,d,e in from internal

2022-07-04 cards c,d,e out to customer (statuses recorded)

2022-07-05 cards a,b,e in from customer (statuses recorded)

2022-07-07 cards a,b in from internal

2022-07-08 cards a,b out to customer

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If you have already created some submittals, you can change the dates (both of incoming and outgoing). Again - we record the ACTUAL, but use the set values.