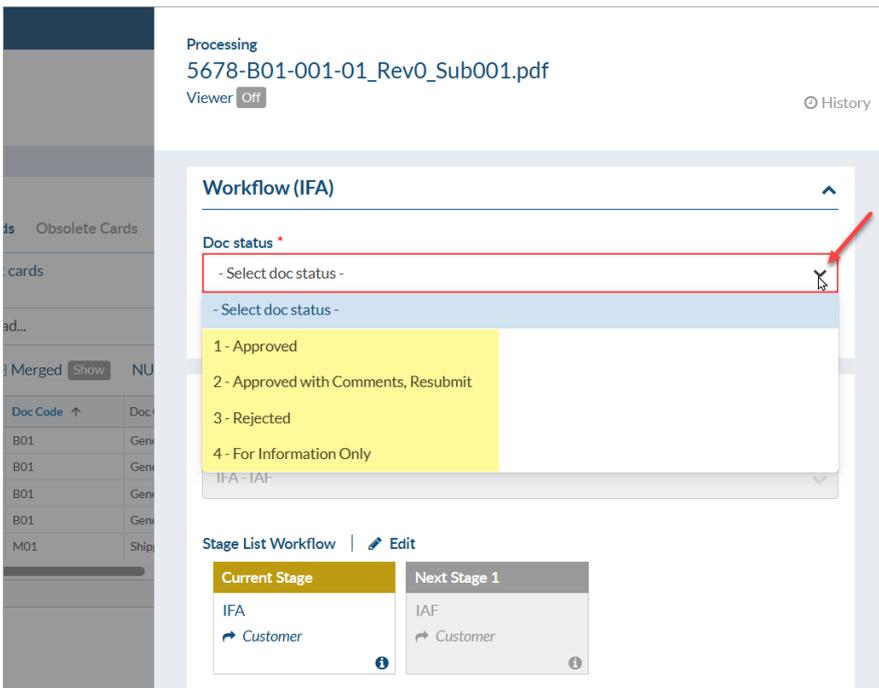


Processing Returned Files from Customer

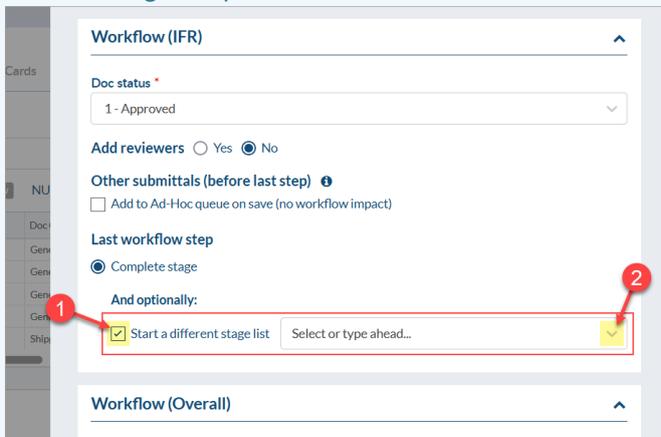
02/18/2026 3:45 pm MST

All returned files from a customer shall be assigned to a card and processed with return status and routing actions.

When a document is returned in a **complete status** (like Code 1 or Code A), there are no further action required. When a document is returned with a different code (e.g., with comments, rejected, etc.), this is considered an incomplete status and further action is expected.



If a document is returned with a complete status, a new stage list can be started. This is useful in cases where there are no further stages in the current stage list, but additional workflow is required after stage completion.



Options to process a file returned with an incomplete status (e.g., with comments, rejected) are to:

- (1) send the file to a sub-supplier or to internal (if they are not DocBoss users), or
- (2) route the card to a DocBoss user to be processed in the system

1. Queue for Submittal Sub-Supplier/Internal

If queue for submittal is selected to "Sub-Supplier" or to "Internal," the document will be moved to > Outgoing Submittals > Sub-Supplier/Internal grid waiting for submittal.

Once submitted, the system will await a return from the sub-supplier/internal source **before** queuing the card for submittal back to the customer.

The screenshot shows a 'Workflow (IFA)' configuration window. The 'Doc status' dropdown is set to '3 - Rejected'. Below it, 'Add reviewers (before next submittal)' has radio buttons for 'Yes' and 'No', with 'No' selected. The 'Other submittals (before last step)' section is highlighted with a red box and contains: a checked checkbox for 'Queue for submittal to', radio buttons for 'Sub-Supplier' (selected) and 'Internal', a checked checkbox for 'Include existing cover page', and an unchecked checkbox for 'Add to Ad-Hoc queue on save (no workflow impact)'. The 'Last workflow step' section has a checked checkbox for 'Customer submittal' and an unchecked checkbox for 'Expect return (editable on stage only)'.



If the "Send the original document + cover page" option is checked, the document returned from the customer (**including** the cover page) will be queued for submittal to the sub-supplier. If unchecked, the document returned from the customer (**excluding** the cover page) will be queued for submittal to the sub-supplier.

2. Internal (User) Routing

If the document should be reviewed prior to resubmittal, it can be routed to a DocBoss user(s) to complete an action. The document will be moved to the "Outstanding Actions" area where the selected user(s) can review the file, upload a new revision and include comments.

Processing
5678-B01-002-01_Rev0_Sub001.pdf
Viewer Off History

Workflow (IFA)

Doc status *
3 - Rejected

Add reviewers (before next submittal) Yes No

Doc Control user
Alysha Mosveen x

Preparer user
Jessica Jones x

Checker user
Lisa Simpson

Approver user
Alysha Mosveen

Doc Control action due date
2026-02-25

Other submittals (before last step)

When selecting the routings, it is possible to assign routing to multiple people for each role. Each user appears in a removable block. To add more users to the routing, click the drop down.

The review of the document will occur sequentially (beginning with the doc controller(s), and ending with the approver(s)). Importantly, **all users** in one role must complete their review before the document will proceed to the next role for review.

If an action is not assigned, we assume there is no action required and that the document should be re-issued to the customer. As such, the document will be placed in the Outgoing Submittals > Pending Submittal to Customer grid waiting for the submittal.

If you would like to learn more about routing options, see the following articles:

- [Internal Approval Cycle](#)
- [Document Workflow](#)
- [Complete an Outstanding Action](#)
- [Assign an Action](#)