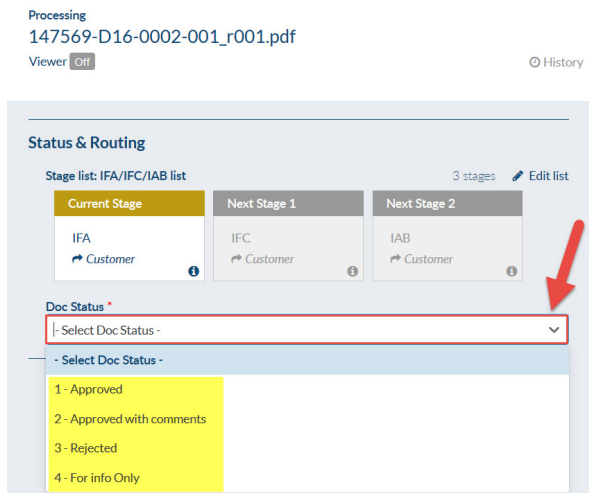


Processing Returned Files from Customer

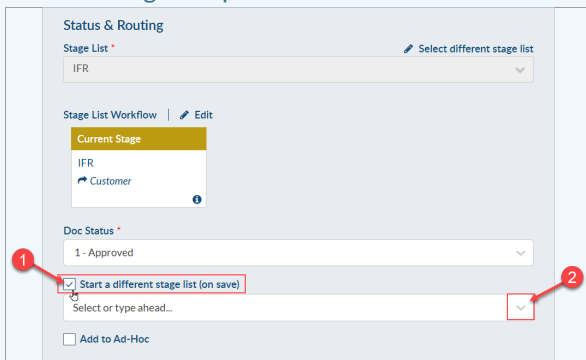
11/10/2025 1:36 pm MST

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.

Doc Status *

2 - Approved with comments

Complete Current Stage

Queue for Submittal

Queue for submittal to Sub-Supplier Internal

Send the original document + cover page

Add to Ad-Hoc

Outgoing Submittals

Pending Submittal to Sub-Supplier

Select Sub-Supplier to Begin Submittal: All Sub-Suppliers

Next Submittal Sequence: 1

Sub-Supplier Submittal

Select	Sub-Supplier	Card Name(Auto)	Level	Reference	Doc Code	Customer Doc #	Stage	Link	Sub-Supplier Comments	Internal/3rd Party Comments	Wolfe PA Rev #	Status	Is Drawing	Send the original document + cover page	Expected File Name
<input type="checkbox"/>	ASCO	D16.8202	Tag (TE)	8202	D16 Instrument Data Sheet		IFA	147569-D16-0002-001_r001.pdf			1	2	No	<input checked="" type="checkbox"/>	147569-D16-00

No more pages | Show on Page: 20 | Items on page: 1

Select All (this page only) Select All (all pages)

[Add to Ad-Hoc Queue](#) [Start Sub-Supplier Submittal](#)

i 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 a routing is selected, 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.

Internal (User) Routing

Doc Control User
Tunde Dorloti

Engineer User
Brad Bowyer x Tunde Dorloti x

Drafter User
Tunde Dorloti x

Project Manager User
Tunde Dorloti

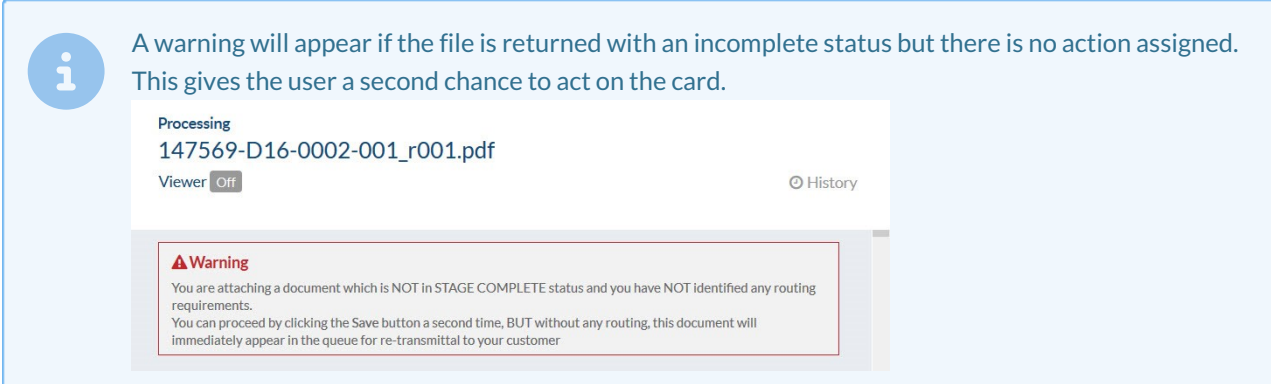
Due to Engineer Date
23/11/2022

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 project manager(s)). 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.



The screenshot shows a document card with the following details:

- Processing**
- 147569-D16-0002-001_r001.pdf
- Viewer Off
- [History](#)

A warning message is displayed in a red-bordered box at the bottom of the card:

Warning
You are attaching a document which is NOT in STAGE COMPLETE status and you have NOT identified any routing requirements.
You can proceed by clicking the Save button a second time, BUT without any routing, this document will immediately appear in the queue for re-transmittal to your customer

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

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