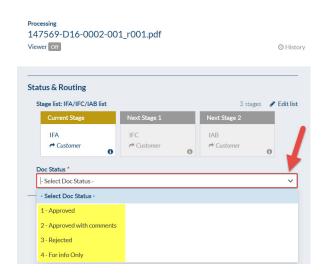
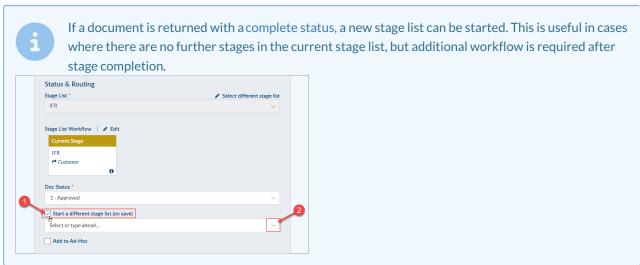
Processing Returned Files from Customer

08/15/2025 10:15 am MDT

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.



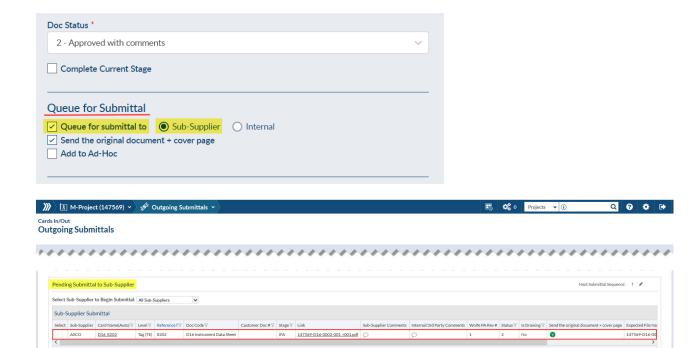


Options to process a file returned with an incomplete status (e.g., with comments, rejected) are to:

- (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.



2. Internal (User) Routing

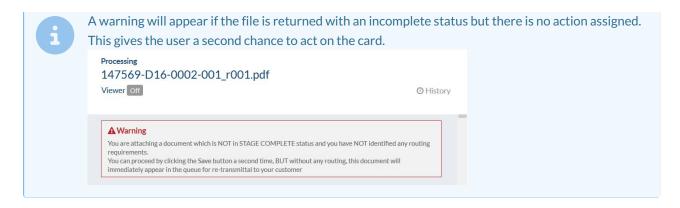
If a routing is selected, the document will be moved to the "Outstanding Actions" area where the selected user(s) can review the file, upload a new revision and include comments.



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.



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