

# 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.

Processing  
147569-D16-0002-001\_r001.pdf  
Viewer Off History

### Status & Routing

Stage list: IFA/IFC/IAB list 3 stages [Edit list](#)

Current Stage	Next Stage 1	Next Stage 2
IFA Customer	IFC Customer	IAB Customer

**Doc Status \***

Select Doc Status -

Select Doc Status -

- 1 - Approved
- 2 - Approved with comments
- 3 - Rejected
- 4 - For info Only



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.

### Status & Routing

Stage List \* [Select different stage list](#)

IFR

Stage List Workflow | [Edit](#)

Current Stage
IFR Customer

**Doc Status \***

1 - Approved

☒ Start a different stage list (on save)

Select or type ahead...

☐ Add to Ad-Hoc

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.

**Doc Status \***

2 - Approved with comments

☐ Complete Current Stage

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**Queue for Submittal**

☒ Queue for submittal to ☒ Sub-Supplier ☐ Internal

☒ Send the original document + cover page

☐ Add to Ad-Hoc

Cards In/Out

Outgoing Submittals

Pending Submittal to Sub-Supplier

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

Next Submittal Sequence: 1

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 Na
<input type="checkbox"/>	ASCO	D16.B202	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

## 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.



A warning will appear if the file is returned with an incomplete status but there is no action assigned. This gives the user a second chance to act on the card.

Processing

147569-D16-0002-001\_r001.pdf

Viewer ☐ Off

 History

**⚠ 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](#)
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