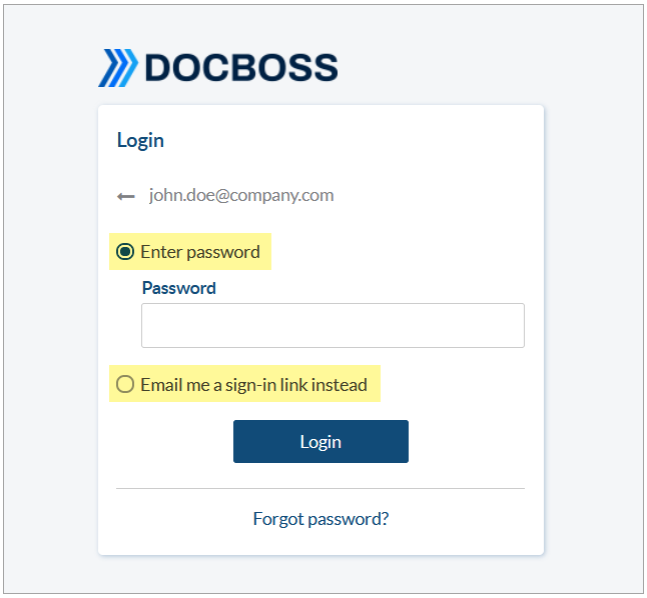
Customer Portal (Customer View)

09/28/2026 11:36 am MDT

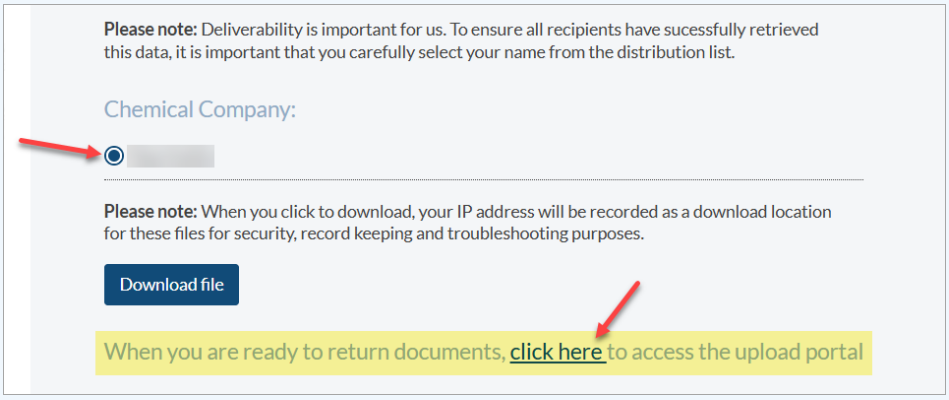
The portal provides a secure location for customers to upload documents directly into the supplier's document control system (DocBoss). The customer can also download received documents.

To access to the customer portal, click on the URL provided by your supplier (*same login link they use*).

Enter your login details (the email and password associated with your account). You may also choose to login using an email sign-in link (instead of entering your password).

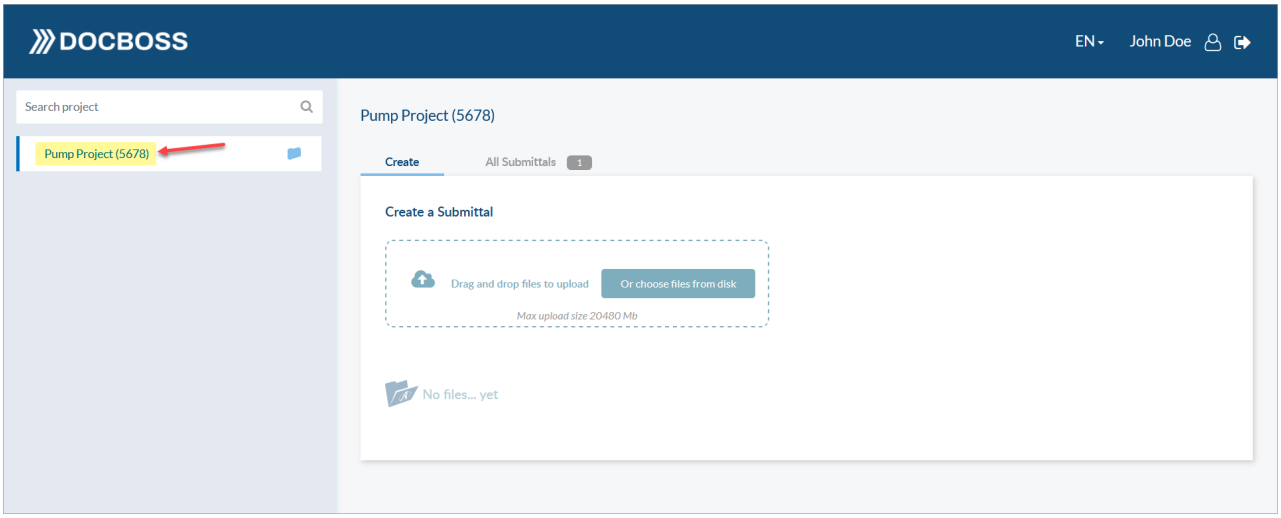


If your supplier provides you with a link to download a submittal, the portal can be accessed from the download page in order for you to submit a return. Note that you must first select your name from the recipient list.

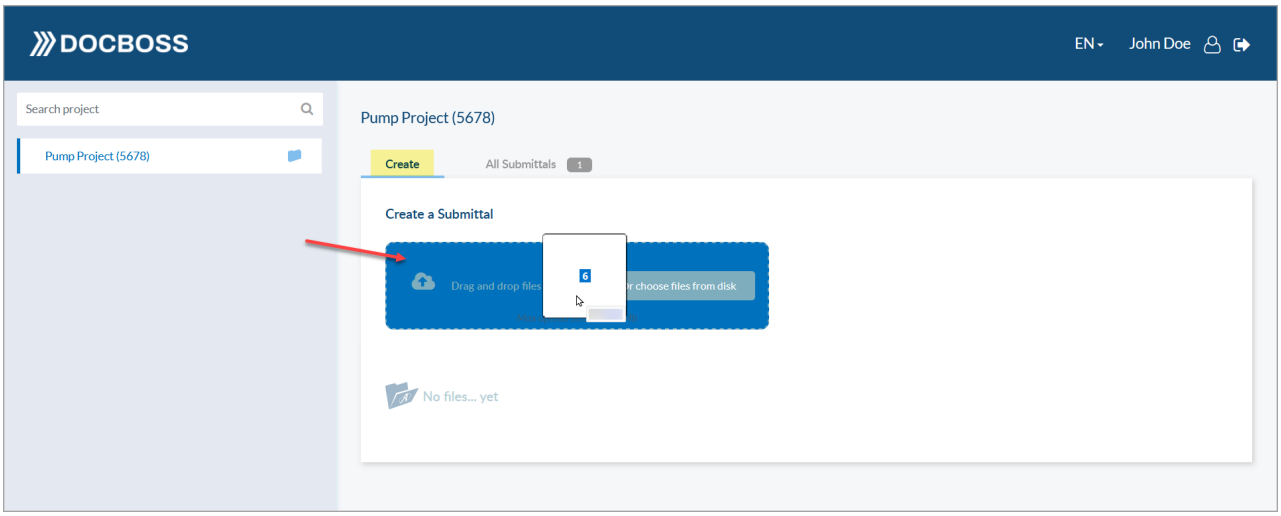


For customers to upload/send documents

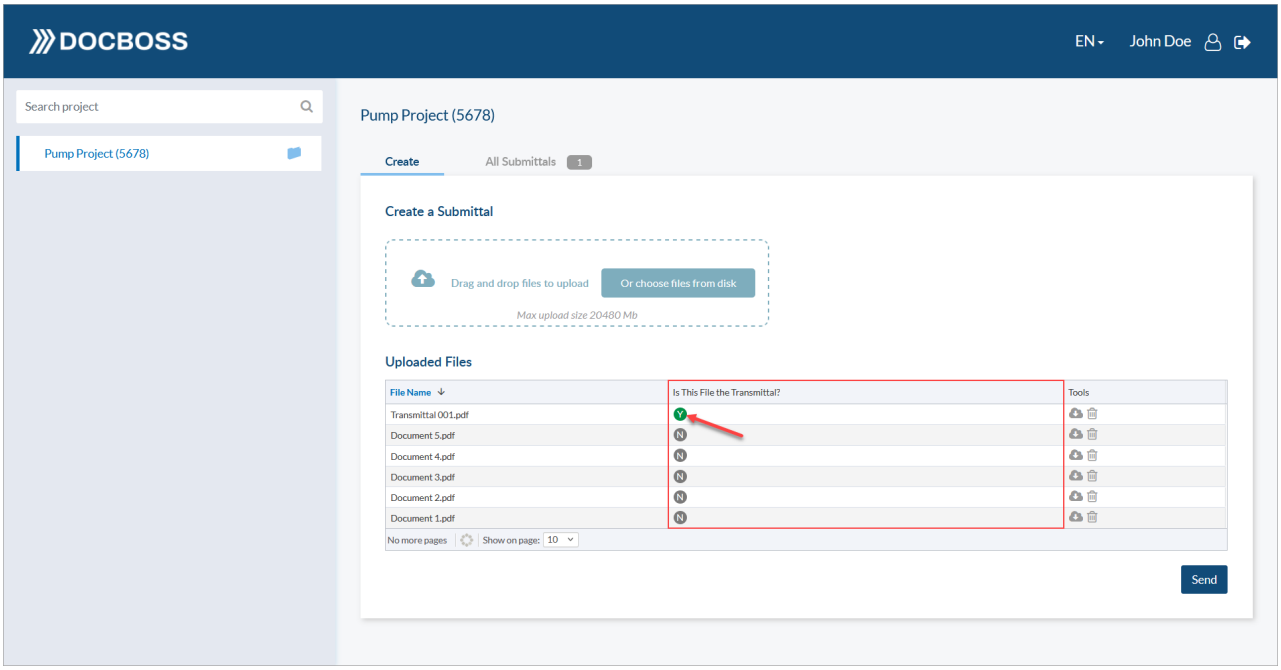
Select the project in which to upload documents to from the left side of the screen.



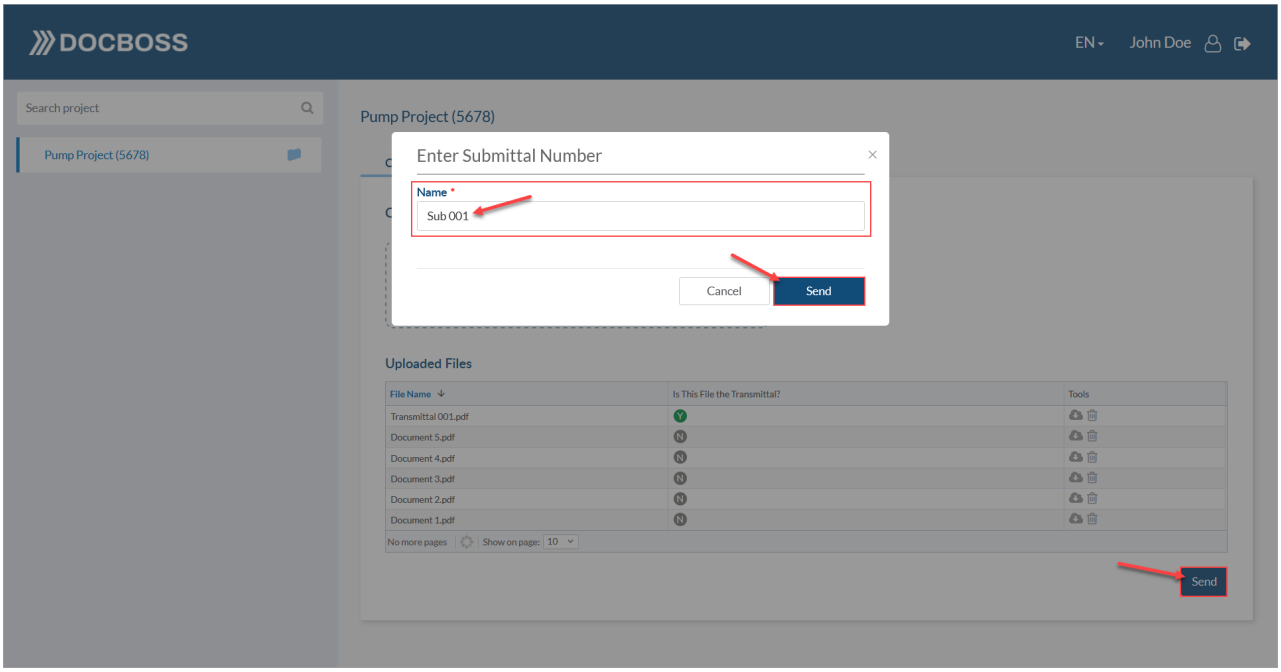
From the "Create" tab, drag and drop documents (or choose them from your disk) to create a submittal. You can upload several files at once.



Once the files have been uploaded, indicate which file is the transmittal (if applicable) by clicking the "N". This will change it to "Y".



To send the submittal, click "Send" in the bottom right. From the pop-up, enter a submittal number and then click "Send" to complete the submittal.



Once the submittal has been sent, a notification will be sent to the DocBoss user informing them that a new submittal is ready to be processed.

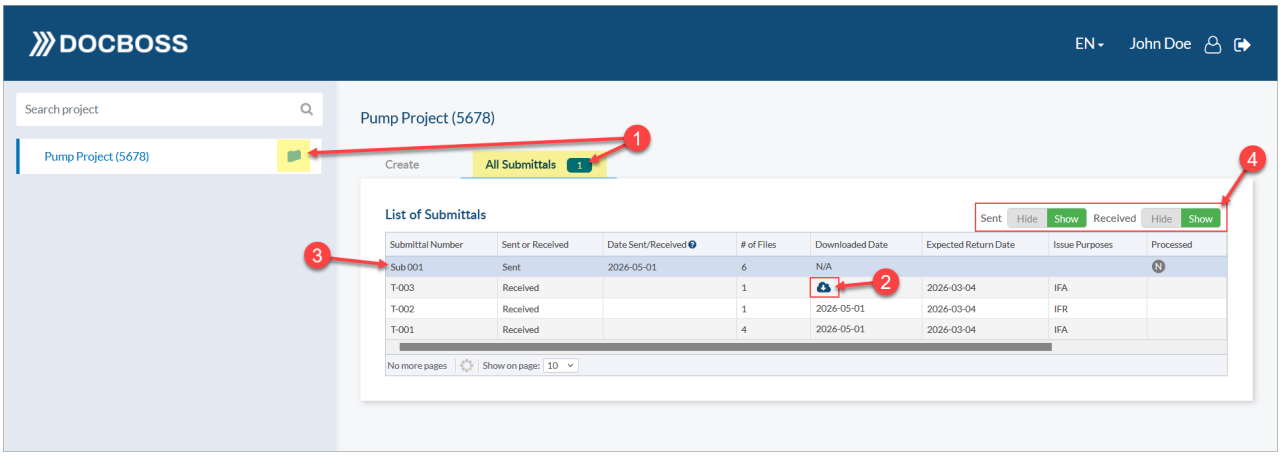
For customers to review submittals (sent and received)

1. The "All Submittals" tab includes all the submittals (sent or received) made on this project through DocBoss. When a new submittal is received (and has not yet been downloaded), a notification will appear beside the tab (and a folder icon will appear beside the project name).

2. Inside the grid, the received submittal will appear with an icon to download it. Once the submittal has been downloaded, the notification will disappear.

3. Submittals you have sent through the portal will appear in blue.

4. Use the show sent/received visibility options to filter the grid by the sent or received submittals.



The grid includes:

- The submittal number
- Whether the submittal was sent or received (from the customer's perspective)
- The date that the submittal was sent or received
  - *Note: Field will be blank if the logged-in user was not included on the recipient list of the email notification*
- The number of files in the submittal
- The date that the submittal was downloaded by the customer
  - *Note: Only on received submittals (shows "N/A" for sent submittals)*
- The expected return date (when received files are due for return)
- The issue purpose(s) of the files included in a received submittal
- Whether a sent submittal has been processed by the supplier
  - Shows "Y" if they have started their internal workflow for these files
  - Shows "N" if they have not yet been accepted
- The date that the submittal was created
- A tools column (to download the submittal)

What happens when a project is marked as complete/closed?

Once a project has been completed, the customer's access is removed. The project will no longer be available in the list of projects the customer can upload files to.

For a short overview of how the portal works, check out our video. The video is shown from a sub-supplier's perspective, but it works the same as the customer portal: Vimeo: Supplier Portal.