

# Customer Portal (Customer View)

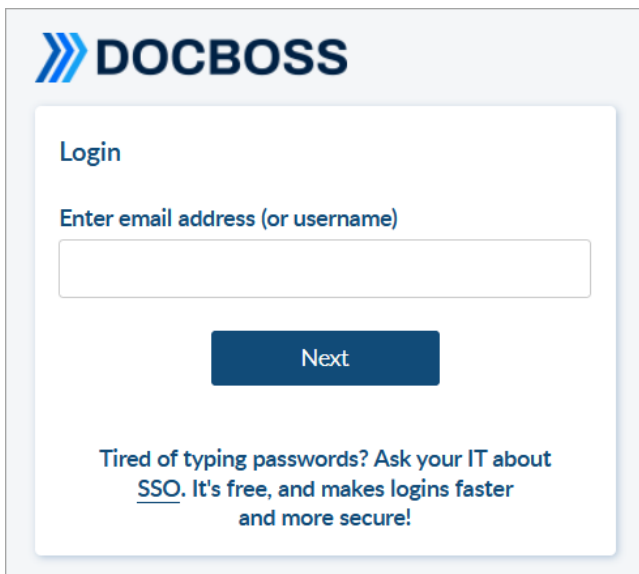
05/01/2026 11:06 am MDT

The customer portal provides a secure location for your customers to upload documents directly into your DocBoss projects. The customer can also download received documents.

The following describes what your customer sees when they access the portal.

To access to the Customer Portal, click on the URL provided by your supplier. (Same login link they use.)

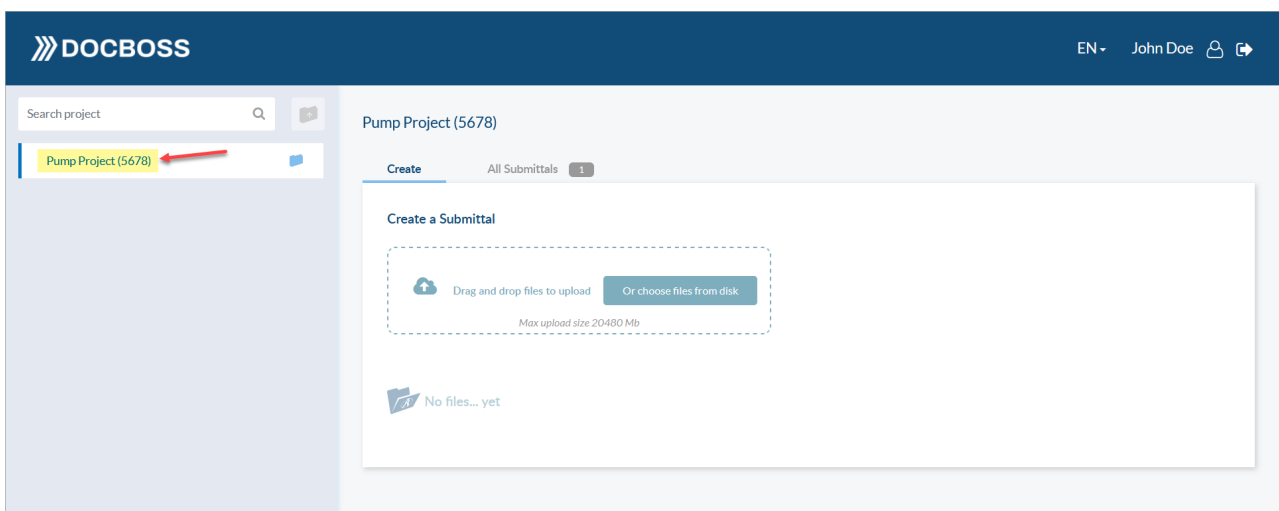
Type the customer login email and password.



The screenshot shows the DocBoss login interface. At the top left is the DocBoss logo. Below it is a 'Login' section with a text input field labeled 'Enter email address (or username)'. A dark blue 'Next' button is positioned below the input field. At the bottom of the login section, there is a promotional message: 'Tired of typing passwords? Ask your IT about SSO. It's free, and makes logins faster and more secure!'.

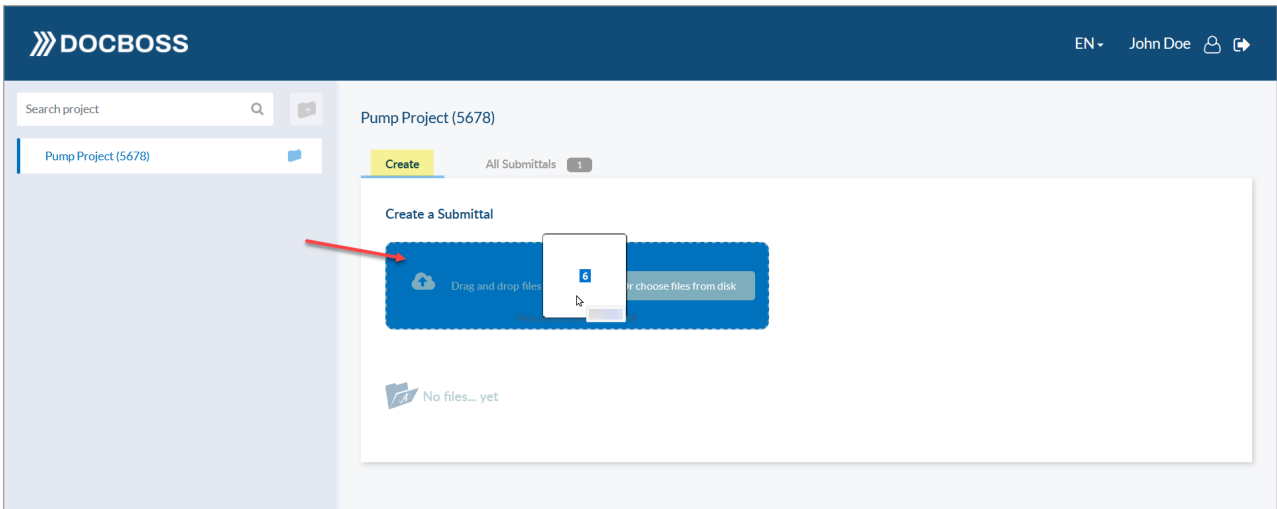
## For customers to upload/send documents

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

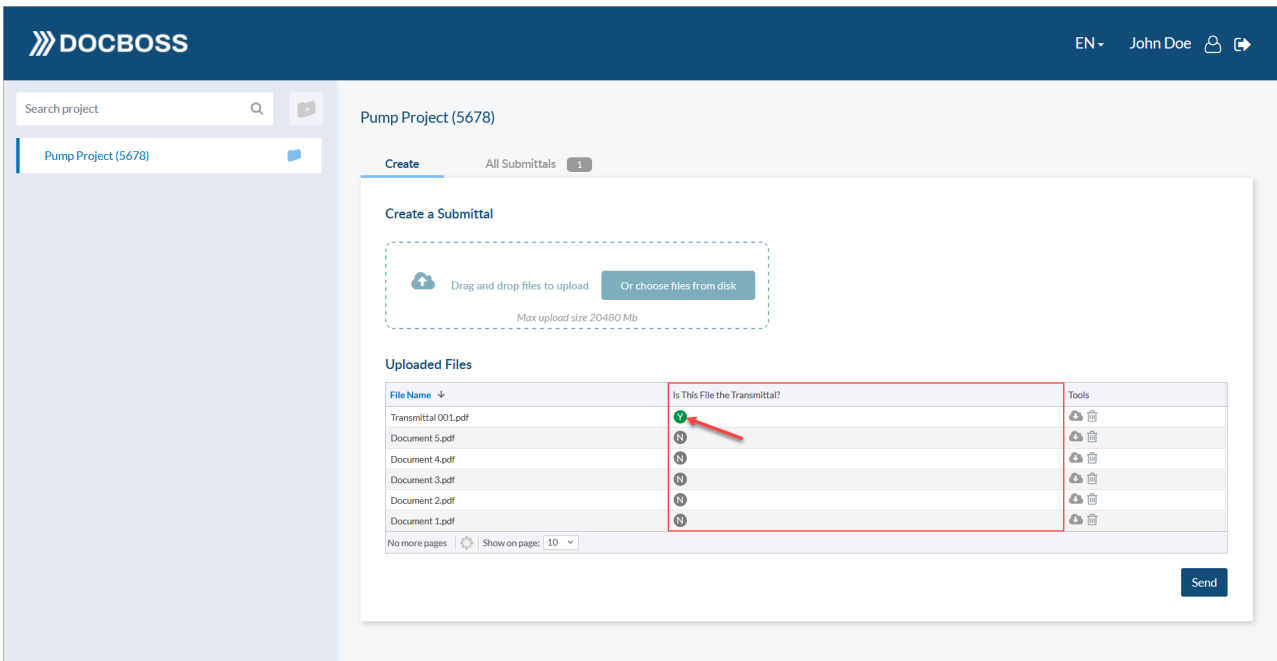


The screenshot displays the DocBoss project page for 'Pump Project (5678)'. The top navigation bar includes the DocBoss logo, language settings (EN), and the user name 'John Doe'. On the left, a search bar and a list of projects are shown, with 'Pump Project (5678)' highlighted and a red arrow pointing to it. The main content area is titled 'Pump Project (5678)' and features a 'Create' tab and 'All Submittals' (1). Below this is a 'Create a Submittal' section with a dashed box containing 'Drag and drop files to upload' and 'Or choose files from disk' buttons. A note indicates 'Max upload size 20480 Mb'. At the bottom, there is a 'No files... yet' message.

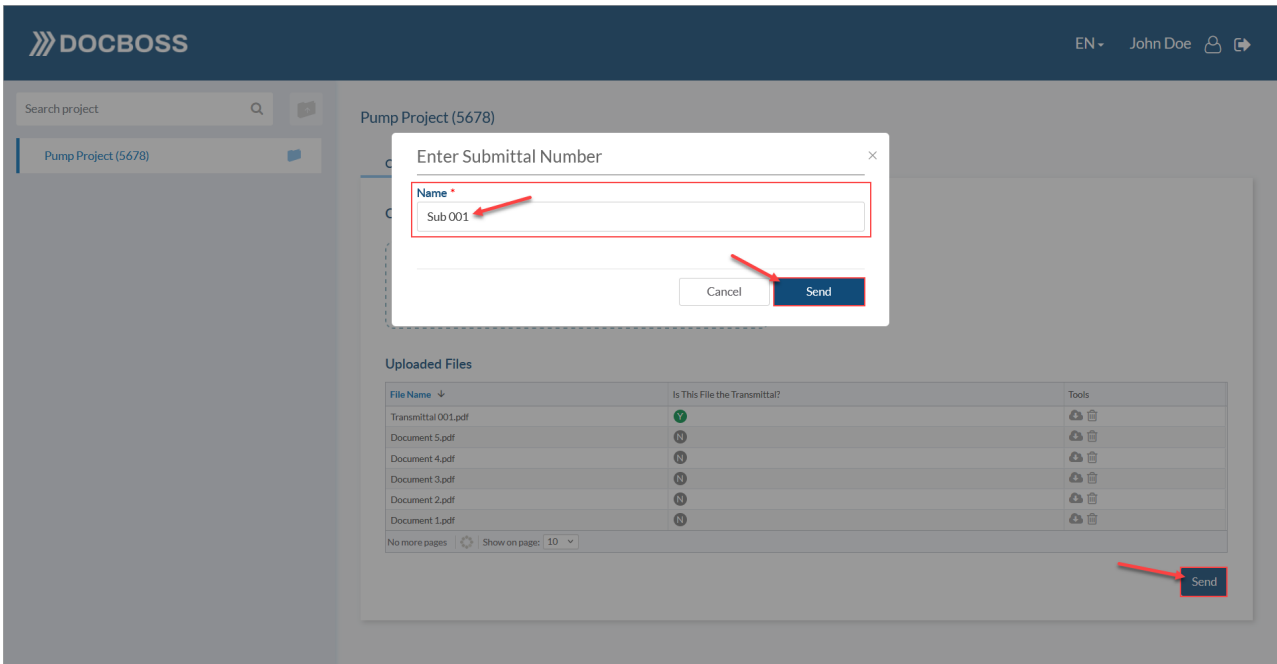
From the "Create" tab, drag and drop documents (or choose them from your disk) to create a submittal. You can upload several files at once.



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.

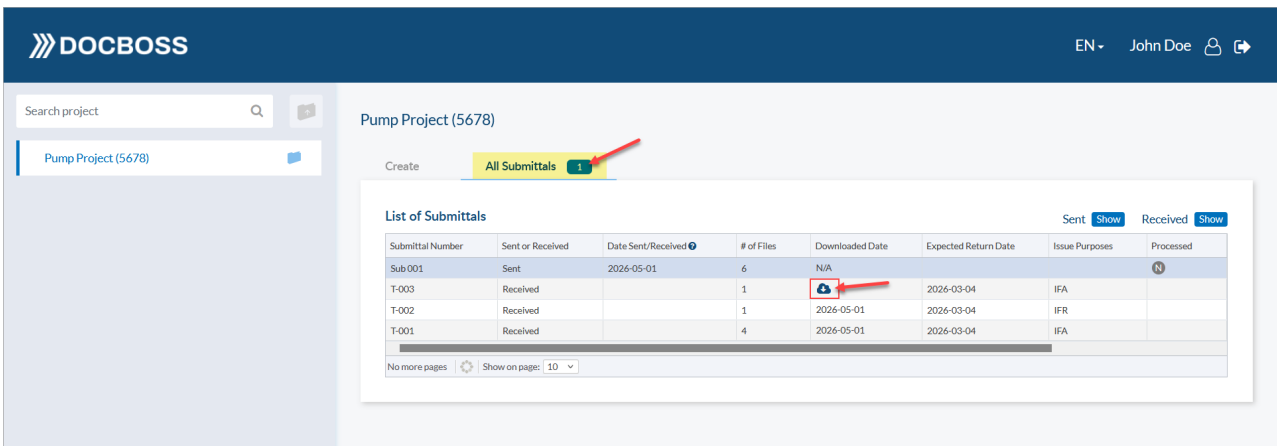


Once the submittal has been sent, a notification will be sent to the DocBoss user informing them that a new submittal is ready to be processed.

## For customers to review submittals (sent and received)

When a submittal has been sent to the customer, it will automatically be placed in the portal. A notification (number in blue beside the "All Submittals" tab) will appear letting the customer know it is available for download.

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



### 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](#).

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