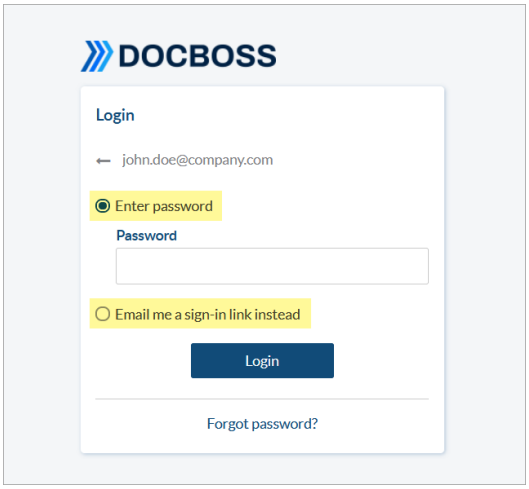
Sub-Supplier Portal (Supplier View)

09/28/2026 11:47 am MDT

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

To access to the sub-supplier portal, click on the URL provided to you (*same login link they use*).

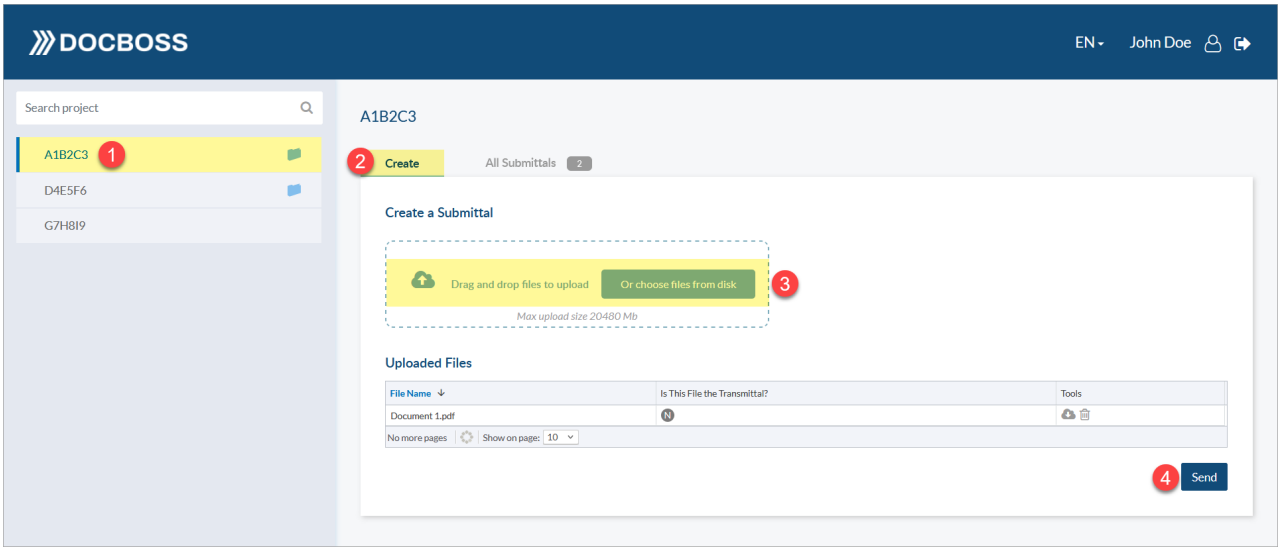
Enter your login details (the email and password associated with your account). You may also choose to login using an email sign-in link (instead of entering your password).



Once in the portal, click on the applicable project name displayed on the left. Projects appear in this list *automatically* based on whether the sub-supplier has been assigned to equipment or cards in any project (see article: Why can't my supplier view the project in the portal?).

For suppliers to upload/send documents

1. Choose the project from the left
    a. Note: If the wrong project is chosen accidentally, the documents can be moved to the correct project later (so there is no need to request that the supplier re-uploads the documents).
2. The "Create" tab is opened by default.
3. Drag and drop the files or choose files from disk. Note that several files can be uploaded at once.
4. Click "Send" to start the submittal, and enter a submittal number before sending.

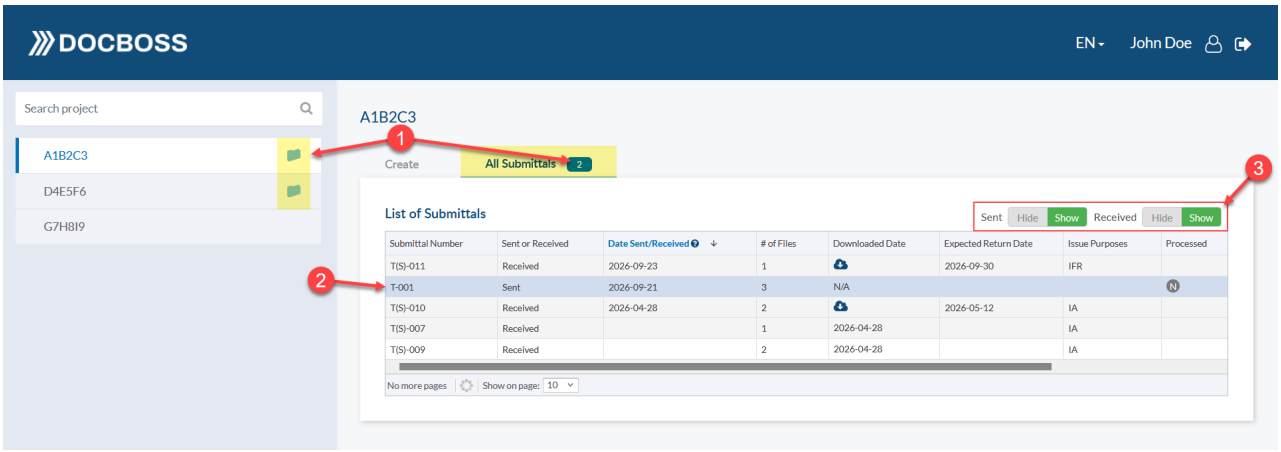


For suppliers to review submittals (sent and received)

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

3. 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 supplier'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 supplier
  - *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 customer
    - 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 suppliers access is removed. The project will no longer be available in the list of projects the supplier can upload files to.

To learn more about the sub-supplier portal, check out this short overview: Vimeo: Supplier Portal.