

Sub-Supplier Portal (supplier view)

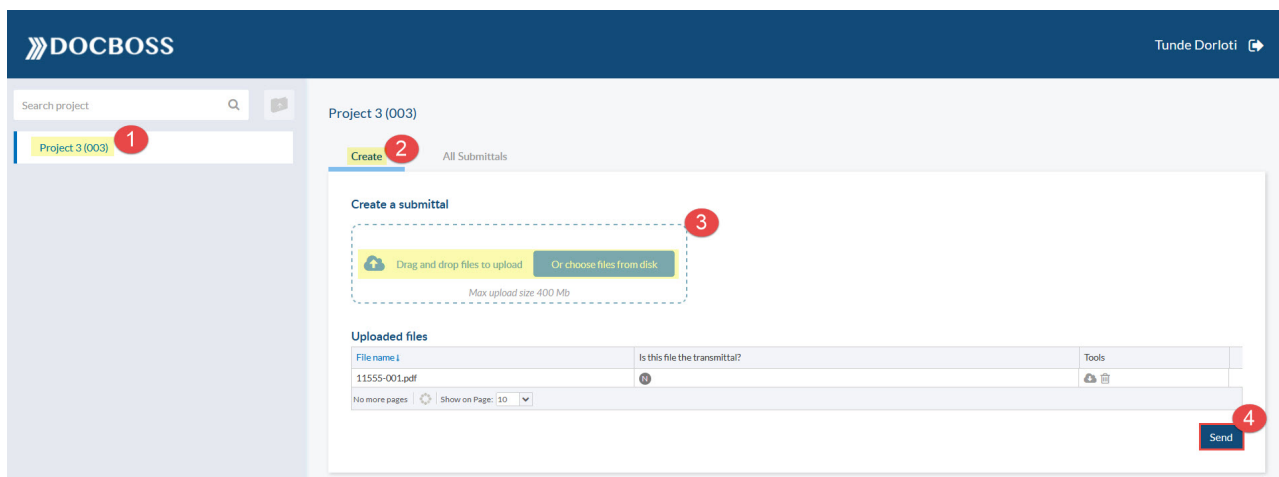
09/16/2024 1:33 pm MDT

The following describes what your suppliers see when they access the portal.

Note the URL you use to login - your suppliers will go to that same URL (i.e. could be system,2,3,4.docboss.com). They will enter their email address and password as you defined for them.

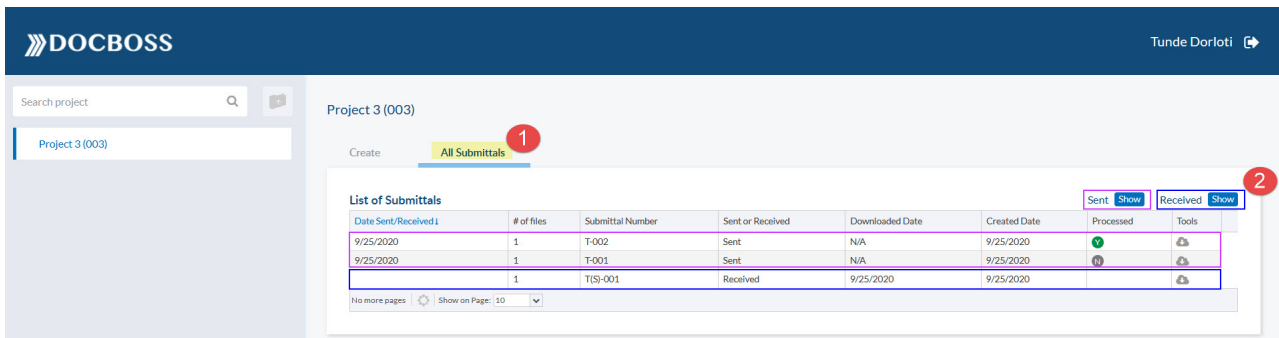
Once in the portal, they will click on the applicable project name displayed on the left. Projects appear in this list *automatically* based on whether the supplier has been assigned to equipment or cards in any project.

For suppliers to upload/send documents



1. Click on the Project Name. (Note: if the supplier chooses the wrong project accidentally, there is an option for users to move the documents to the correct project later so that there is no need to request 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. Send - Click send to create a submittal which will place the uploaded files in *Customers Portal*.

For suppliers to review submittals (sent and received)

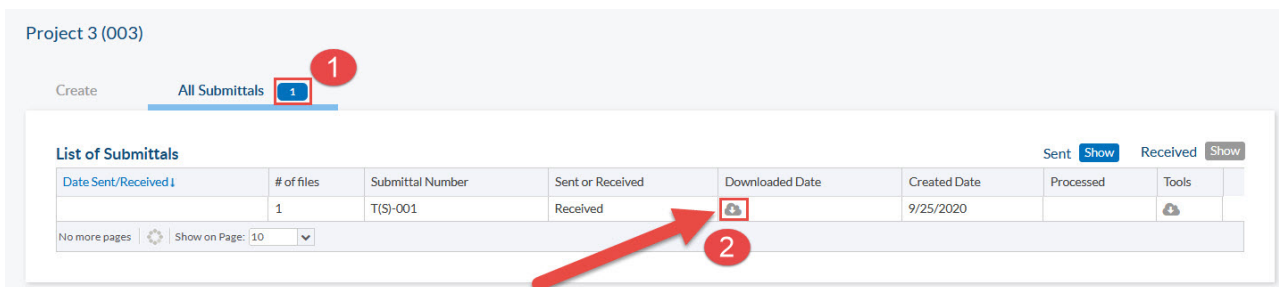


1. All Submittals tab. This page includes all the submittals (Sent or Received) made on this Project through DocBoss
2. Send (Show)/Received (Show) - Gives the option to filter by the sent or received submittals

Notifications

When a submittal has been added to the portal, but has not yet been downloaded by the supplier, a number will appear beside the tab name.

Inside the grid, the submittal will appear, along with the icon to download the received submittal.



The grid includes information related to:

- The date that the submittals were sent or received
- The number of files in the submittal
- The submittal number
- Sent or Received: Whether the submittal was sent or received (based on supplier viewpoint)
- The date that the files were downloaded by the supplier (only on received submittals, sets N/A on sent submittals)
- The date that the submittal was created (on sent submittals).
- A set of actions (icons) which are available to the user (Tools)

NOTE: The **processed** column: This tells the supplier whether the files have been accepted by the customer.

- Y - customer has started their internal workflow for these files
- N - customer has not yet started these files on their internal processing journey

Project 3 (003)

Create **All Submittals**

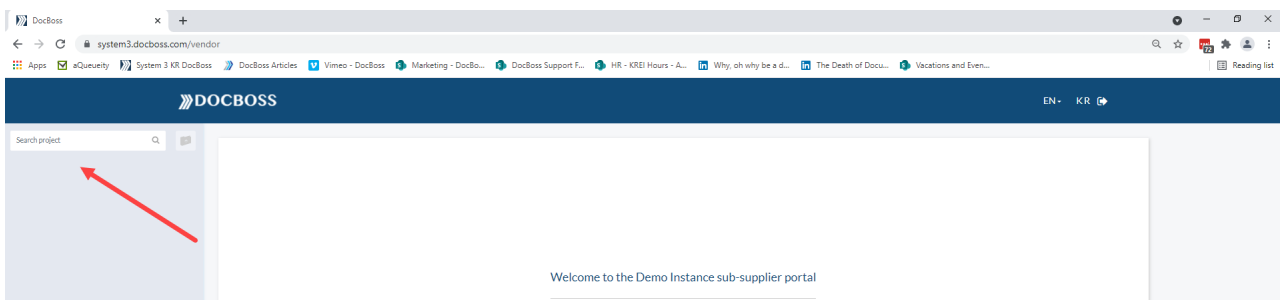
List of Submittals

Date Sent/Received	# of files	Submittal Number	Sent or Received	Downloaded Date	Created Date	Processed	Tools
9/25/2020	1	T-002	Sent	N/A	9/25/2020	✓	🔧
9/25/2020	1	T-001	Sent	N/A	9/25/2020	✗	🔧

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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 docs into.



Check out our video for a short overview of how the portal works: <https://vimeo.com/501744793>