

Company Status Lists

08/01/2024 1:38 pm MDT

A **Status List** is the approval statuses that are used by your customer to indicate if a document will be accepted.

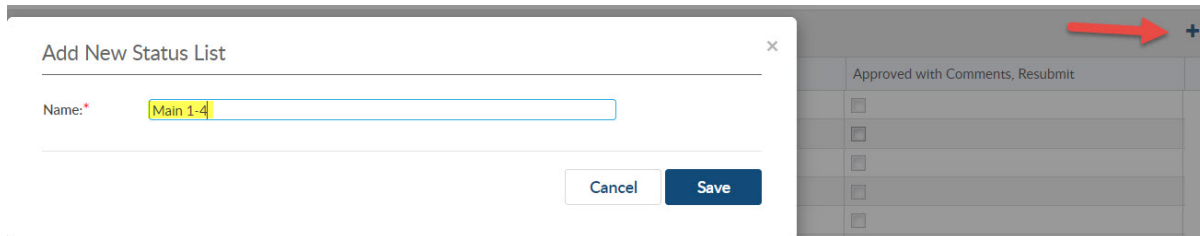
You must enter a status list that will define the designations used by your customer. DocBoss can support multiple lists for each customer. For example, they may have clients which require different lists, you simply create a new list to satisfy each requirement.

Settings - Lists - And while under the applicable company - Code / Status / State - Customer Return Statuses



Step 1 Add New List form

Click the Add Icon in top right corner and provide name for your list. You want your name to be something that will make it easy to select for future projects



You will notice there are some default Statuses that auto-populate into your Status List Grid (you can not delete or modify these):

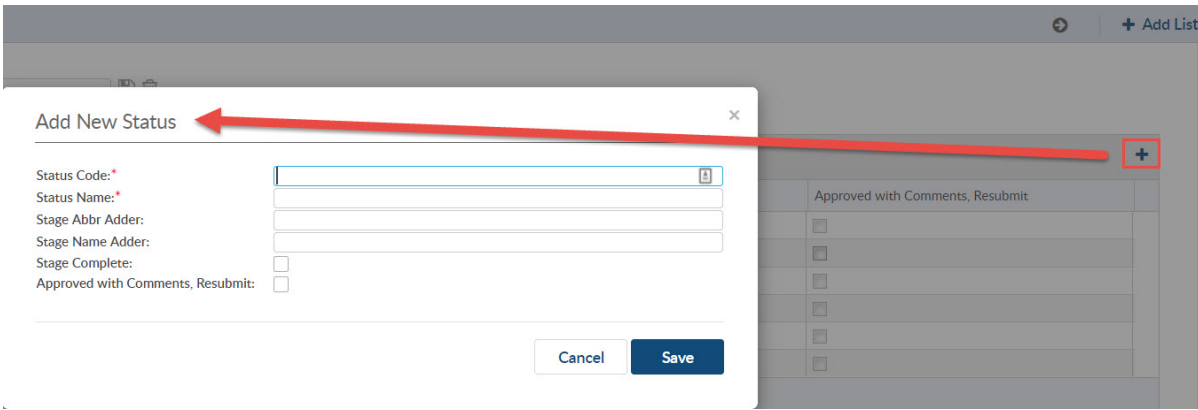
Null: indicates that nothing has been done with this register to date.

X: indicates the document has been added to the system for the first time but initial submission has yet been made.

Z: indicates that the specific register has been manually completed (i.e. by marking an entire project as "Complete".)

Step 2 Add Customers Statuses

Click the Add icon in the top right corner of the Status List Grid



Status Definitions

Status Code: the status code used by your customer

Status Name: the status name used by your customer

Stage Adders - How are these used?

Sometimes customers want to receive the revisions of the documents with status “Approved with comments” or “Rejected” with an “R” or the comment “Customer Comments Incorporated” included on the cover sheets.

For a detailed explanation of how this works more information is added on [Stage Abbreviation Adders](#).

Stage Complete: When a document is assigned this status, no further action is required. It is the trigger for DocBoss to move the document from the transmittal queue to the completed queue. (At least one status in every list must be checked as fully approved.)

Status Code	Status Name	Stage Abbr Adder	Stage Name Ad...	Stage Complete	Tools	Approved with Comments, Resubmit
1	Approved			<input checked="" type="checkbox"/>		<input type="checkbox"/>
2	Approved with comments			<input type="checkbox"/>		<input checked="" type="checkbox"/>
3	Rejected			<input type="checkbox"/>		<input type="checkbox"/>
4	For info Only			<input checked="" type="checkbox"/>		<input type="checkbox"/>
NULL	NULL status			<input type="checkbox"/>		<input type="checkbox"/>
X	Required for Order but Initial Submission not yet made			<input type="checkbox"/>		<input type="checkbox"/>
Z	System Completed document			<input checked="" type="checkbox"/>		<input type="checkbox"/>

Suffixes

You will notice various values being appended to customer statuses. These statuses can be viewed on the Card List inside your project.

Tools	Required	Doc Code	Title	Status (Combined)
	<input checked="" type="checkbox"/>	DMD	Dimensional Drawing	2(*)
	<input checked="" type="checkbox"/>	ITP	Inspection and Test Plan	X+

- + : Document has been submitted to your customer:
- - : Document has been submitted to the Sub-Supplier

- * : Document has been submitted internally
 - () : If any of the above suffixes are in brackets it means that the document is placed in the outgoing queue but not submitted yet
 - a : Document has been routed to "admin" contact, and has not yet been reviewed/completed.
 - t : Document has been routed to the "technical" contact and has not yet been reviewed/completed.
 - d : Document has been routed to the "drafter" contact and has not yet been reviewed/completed.
 - c : Document has been routed to the "construction" contact and has not yet been reviewed/completed.
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