Sub-Supplier Portal (Admin)

07/14/2025 9:42 am MDT

The sub-supplier portal provides a secure location for your vendors to upload (and download) documents directly into your DocBoss projects. To allow sub-suppliers to view the portal, the sub-supplier will need to be:

Added to your system
 Granted access to the project

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1. Add sub-supplier account

To add a sub-supplier account, navigate to System Menu > Users > Manage Sub-Supplier Accounts.

1.18			C Edit your profile	1
Hi,	•			
Users	Lists	(Admin	Customization	
Manage Users	Companies	General		dd
View Permissions	Contacts	Security Settings	Project (Main) Fields	
Manage Sub-Supplier Accounts	Relationships	Stage Lists	Doc Code/Card Fields	
0	Jobs	Distribution Lists	Equipment Fields	
		Compil. & Pkg Presets	Library Card Fields	
FTR	R.	Queries List	Custom Lists (for Fields)	
Library 🗐 Reports	Custom Levels	Project Templates		
Manage Library	Project Metrics	Routing Scenario	Labels	
Library Document Types	Assignment Activity	Generation Status		
,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,	0	Other Lists	Template Mgmt	
			Output Templates	
			Allow support to access your account	

Once on the page, you can add sub-supplier account individually, or in bulk.

Individual account setup

To individually set up a sub-supplier account, click the "+ Add" button above the grid.

Phone Login ↑ Email		
Phone Login \uparrow Email	oplier Account List	ub-Supplier Ac
	Sub-Supplier Name	ools
No rows to show		
No rows to show	s to display 🖉 Show on page: 10 💌	o records to display

In the form, fill in the details for the specific user account. The users' first and last name are required, along with the system access and password information.

Admin Mana	은 Users Manage Sub-Su				Add Sub-Supplier Account			×
				-		🖋 Collapse All	Expand Al	
	o-Supplier Account List	Sub-Supplier	Name	Email	User info First Name *		^	
LOB		Sub-supplier	No rows to show	Email				
Nor	records to display 🛛 🎼 Show on page: 10 🗸				Last Name *			
					Address			
				_				
					Phone		h	
					Time Zone			
					Select or type ahead		~	
								5
					System access		~]
					Set password		~	1
								1
						Cancel	Save	

If desired, an invitation email can be sent to the user associated with the sub-supplier account.

	DOCBOSS	
Set password Send Invitation email Force user to change password DISABLE account authentication	Hi John! A DocBoss user account has been created for you. When you login, you will be redirected to your identity provider to c to that service. Once complete, you will be taken directly into DocBoss. To login, please click <u>here</u> to go to the DocBoss login page. We suggest you bookmark the login page. For a quick intro and to access our support articles, click here: <u>https://support.docboss.com/home/getling-started</u> . Welcome to DocBoss! Note: If you are unable to click the link, please copy and paste the below into your browser.	.omplete your normal login
	Best Regards, DocBoss Security Team	
	This is a notification email only. Please do not reply to this email.	

Bulk account setup

To add multiple sub-supplier accounts at once, click the "Excel Import/Export" button below the grid. From the pop-up, download the Excel file and fill out any of the required (*) fields. Once filled out, upload the file to the same pop-up using the upload drop-box.





You can have multiple accounts for each sub-supplier, but **each account will have access to all of the same sub-supplier projects** (automatic project lists).

2. Enable sub-supplier access on project

One the sub-supplier(s) have been added to the system, access for sub-suppliers will need to be granted on individual projects. To allow sub-suppliers access to a project, navigate to **Project Menu > Set Up > Project Template**. In the "Project Settings" section, choose "Yes" for the "Allow Sub-Supplier Access" option.

Project Settings	Project Settings				
Doc Code/Card Fields	Default EQ Number		Manual Cards Module		
Additional Unit Types	Tag	~	No	~	
Combination Fields	Stage List		Major Tags Module 😧		
	IFA	~	No	~	
Equipment Fields	Default Level		Enable Submittal CP Bookmark		
Project (Main) Fields	Order	~	Yes	~	
Doc Code Queries	Default Cover Page / Stamps		Submittal CP Bookmark Pattern		
Compilation / Package Presets	Cover page only (no stamp)	~	III <title></td><td></td><td>8</td></tr><tr><td></td><td>Enforce Sub-Supplier Selection</td><td></td><td>Exceptional handling default (for file uplo</td><td>ads) 😧</td><td></td></tr><tr><td></td><td>Yes</td><td>~</td><td>Off</td><td>~</td><td></td></tr><tr><td></td><td>Allow Sub-Supplier Access</td><td></td><td>Horizontal unit upload; sub-unit lettering</td><td>0</td><td></td></tr><tr><td></td><td>No</td><td></td><td>Dedicated by Column (skip letter if colu</td><td>umn is empty) 🗸</td><td></td></tr></tbody></table></title>		

Before a project will display in the sub-supplier portal, the sub-supplier must be listed on**at least** one piece of tagged equipment OR a document must have the sub-supplier set in the override field.

Sub-supplier notifications

Users can specify if they would like to be notified about sub-supplier submittals (for all projects, or just their own projects).

To update this setting, navigate to **System Menu > Users > Manage Users**. Click the pencil icon (under "Tools") for the user profile in question. In the "System Notifications" section, modify the notification setting to the users' preference.

🧱 😤 Users 🛛 Manage Users 🗸		E C C Projects V C Q	0 ¢
ers / Manage Users		x [∉] Collapse	All 🛃
Profile	8.2	Notifications	
User Info	~	System Notifications	
Access	12	O System notifications are displayed in the navigation bar at the top of each page. Notify me about received sub-supplier submittals	
Permissions	~	My projects only	
Login	~	All projects My projects only	
Affiliate	~	Email Notifications	
ignatures and Certificates	× 2	Defaults	
Outputs Signature	~	Interface	
eSignature	~	Submittals	
		Warnings	
		Learning Mode	

With sub-supplier notifications enabled, the user will receive a notification in their system (displayed as a red bell) when a submittal has been made by a sub-supplier. The red bell will redirect the user to the Project List and where a list of projects with unprocessed submittals will be displayed.

Once the appropriate project is selected, navigate to **Project Menu > Cards In/Out > Incoming Documents** to see the submittal listed in the "Files from Sub-Supplier" grid.

Project 3 (003) ~ # Incomi ds In/Out coming Documents	ing Documents 🔹	
Files from Sub-Supplier		Files from Internal/3rd Party
Drag and drop to create n Or choose files from dist		Drag and drop to create new submittal Or choose files from disk
Max upload size 400Mb		Max upload size 400Mb.
Stolders Delete	+ Add Submittal	Ofolders Delete + Add Submittal
Name Submittal Date Progress	Sub-Supplier Tool	Name Submittal Date Progress From Tools
✓ <u>T-001</u> 9/25/2020 1/1	Supplier Wolfe CA 🕜	No more pages 🔹 Show on Page: 20 🗸
✓ <u>T-002</u> 9/25/2020 1/1	Supplier Wolfe CA 🧳	
	Supplier Wolfe CA 🥒 🛛	

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To see how sub-suppliers view notifications in the portal, see this article: Sub-Supplier Portal (Supplier View).

Note: Email notifications will only be sent to sub-suppliers if the option is selected on submittal (see article: Options for outgoing (submittal) notification emails).

Sub-supplier portal security

Sub-supplier accounts, like DocBoss user accounts, can have multi-factor authentication (MFA) enabled for additional security. For instructions on enabling MFA for the sub-supplier portal, see this article: Multi Factor Authentication (MFA) for Users.

DocBoss messaging on sub-supplier portal

The use of the sub-supplier portal is included in your DocBoss subscription, and simply requires that you provision an account to your vendor. In exchange for this function, a small advertisement is placed below the portal grids that encourages vendors to consider DocBoss for their own use.

Example:

WDOCBOSS		Brad Bowzer 😭
Search project Q 🚺	Transmitters (SO123)	
My Test Project1 (1234566)	Create All Submittals	
Transmitters (\$0123)	Create a submittal	Drag and drop files to upload Or choose files from disk Max upload size 400 Mb
	0	Need a tool to track, manage & create customer facing document submittals (w SDIs, cover sheets, databooks etc?) Learn more about using DocBoss in your company!

If you wish to use the portal but suppress all DocBoss messaging, please reach out to our support team. The vendor focused messaging can be disabled for an additional fee.

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