Sub-Supplier Portal (Admin)

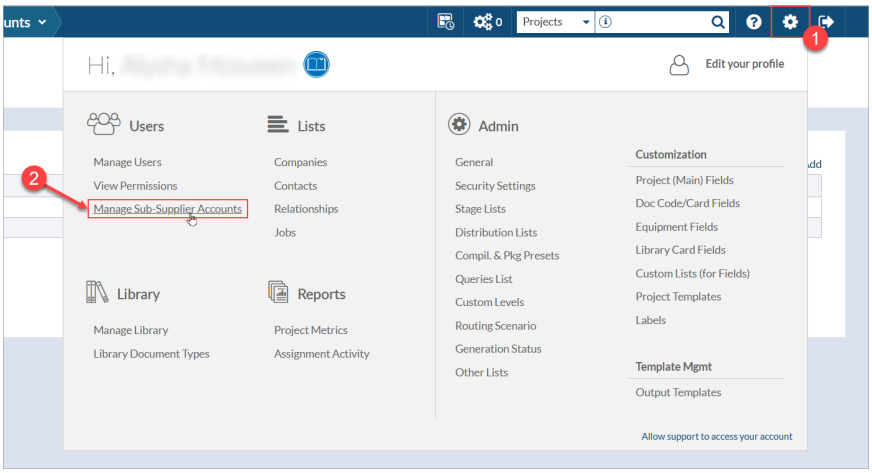
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The sub-supplier portal provides a secure location for your vendors to upload (and download) documents directly into your DocBoss projects. To allow sub-suppliers to view the portal, the sub-supplier will need to be:

1. Added to your system
2. Granted access to the project

1. Add sub-supplier account

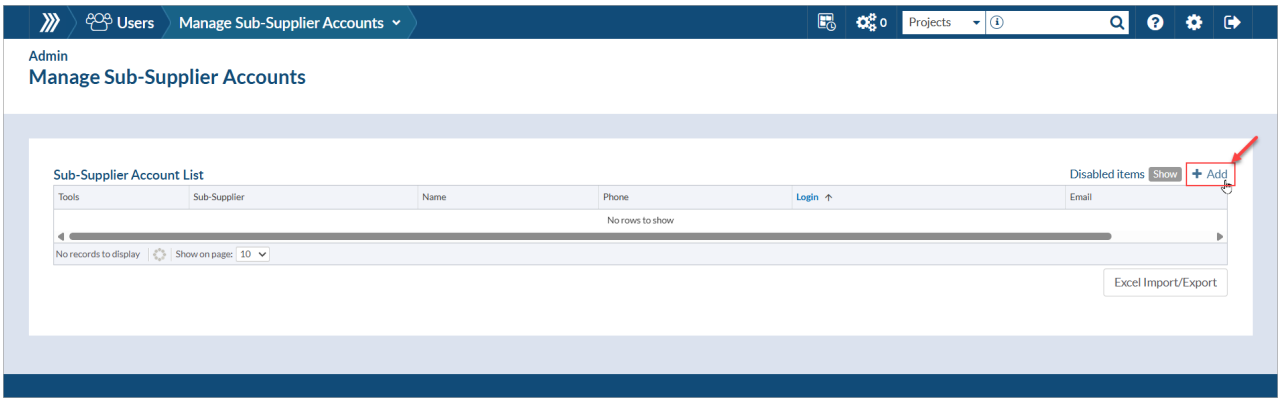
To add a sub-supplier account, navigate to **System Menu > Users > Manage Sub-Supplier Accounts**.



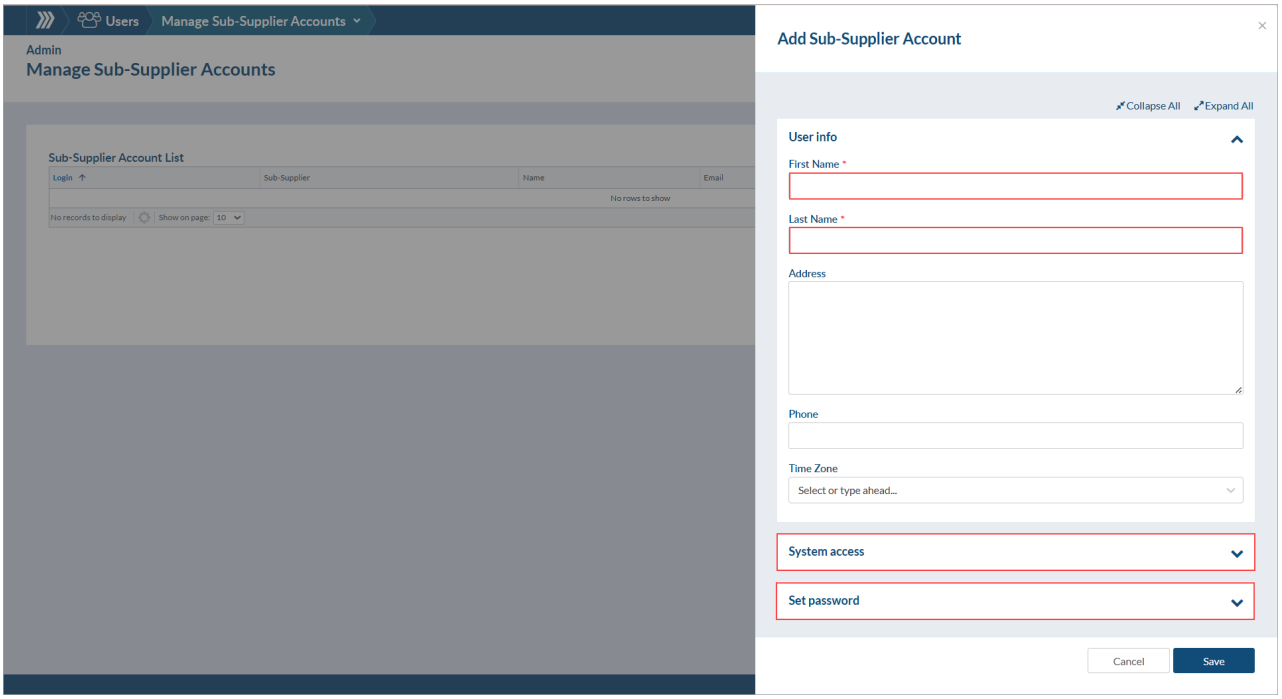
Once on the page, you can add sub-supplier account individually, or in bulk.

Individual account setup

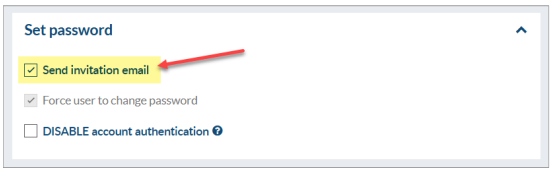
To individually set up a sub-supplier account, click the "+ Add" button above the grid.

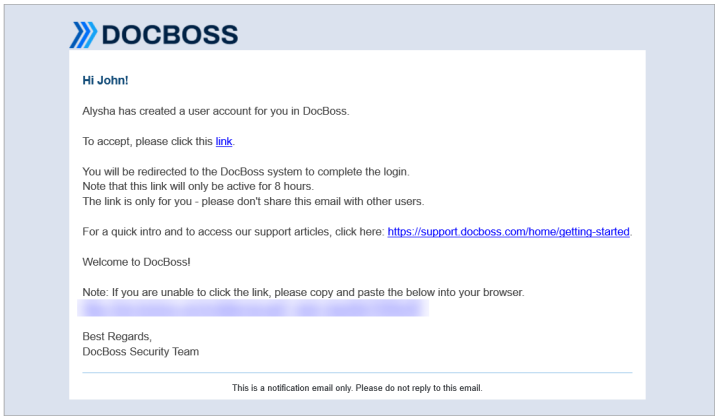


In the form, fill in the details for the specific user account. The users' first and last name are required, along with the system access and password information.

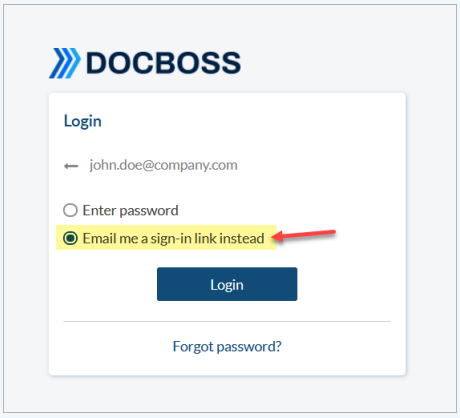


If desired, an invitation email can be sent to the user associated with the sub-supplier account. From this email, they will be re-directed to DocBoss to set their own password.



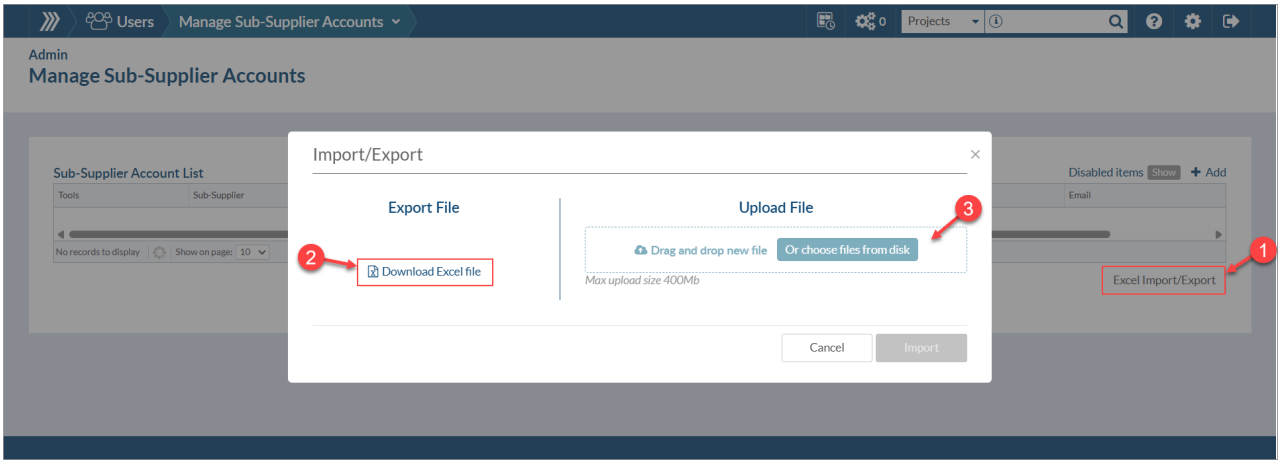


Note: Though a sub-supplier account must be set up with a password, the user can choose to log in using an email sign-in link instead of using the password associated with their account.



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.

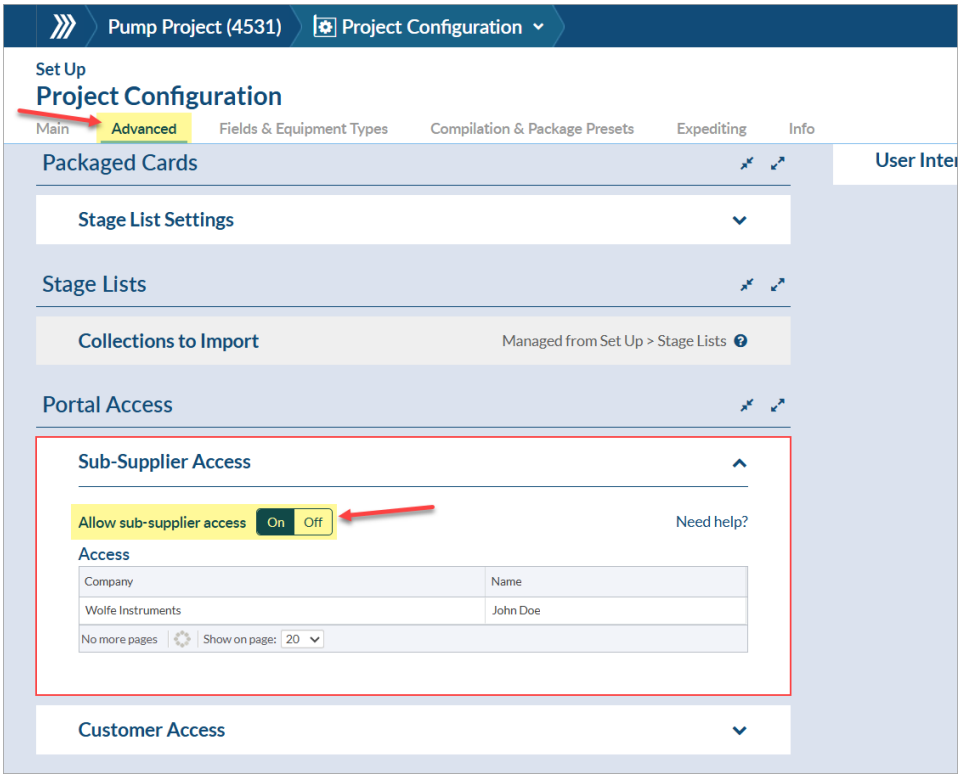


You can have multiple accounts for each sub-supplier, but **each account will have access to all of the same sub-supplier projects** (automatic project lists).

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 Configuration**.

From the "Advanced" tab ("Sub-Supplier Access" section), set the "Allow sub-supplier access" option to "On". Once enabled, a list of contacts with access to this project through the portal will be displayed.



Visibility

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.

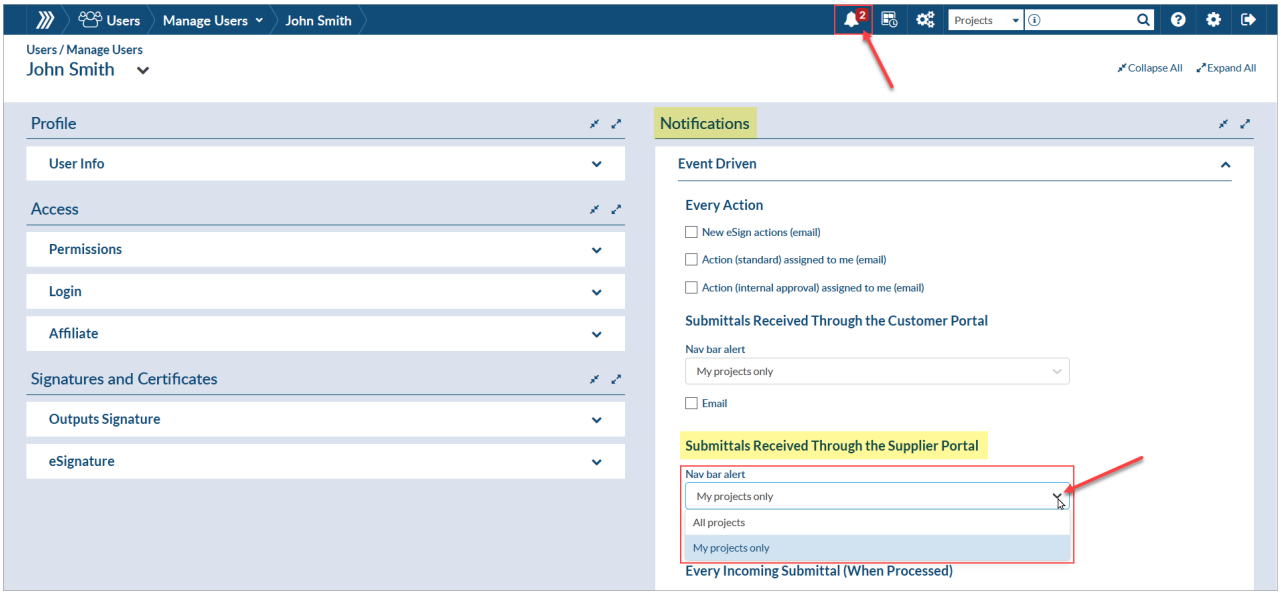
In addition, the project must **not** be hidden OR completed.

Hidden?	Completed?	Visible from the portal?
No	No	Yes
Yes	No	No
No	Yes	No
Yes	Yes	No

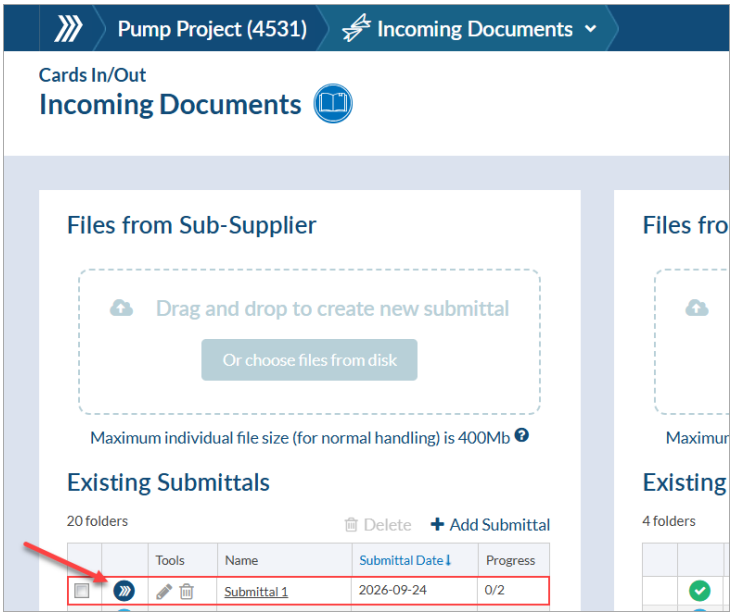
Sub-supplier submittal notifications

Users can specify how they would like to be notified about sub-supplier submittals. For the navigation bar (bell icon), notifications can either be received for all projects, or only the projects they're assigned to. There is also the (optional) option to receive an email notification when a portal submittal is received.

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 "Notifications" section, modify the supplier portal notification settings to the users' preference.



The navigation bar notification will redirect the user to the **Project List** 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.



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).

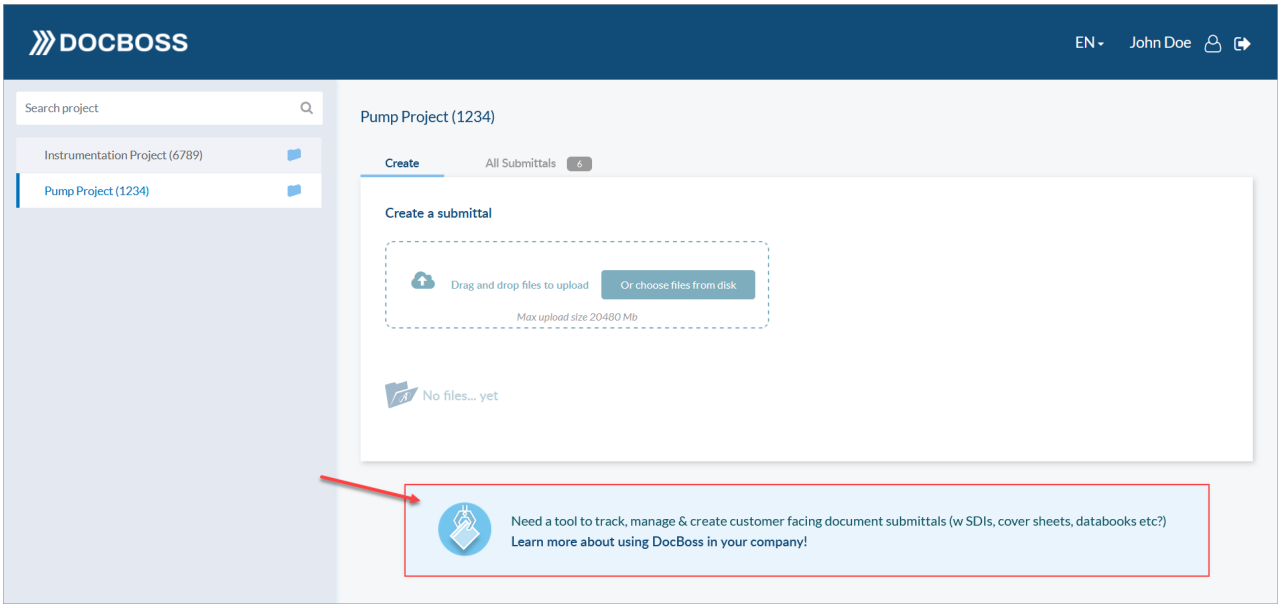
Sub-supplier portal security

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:



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.