

Sub-Supplier Portal (Admin)

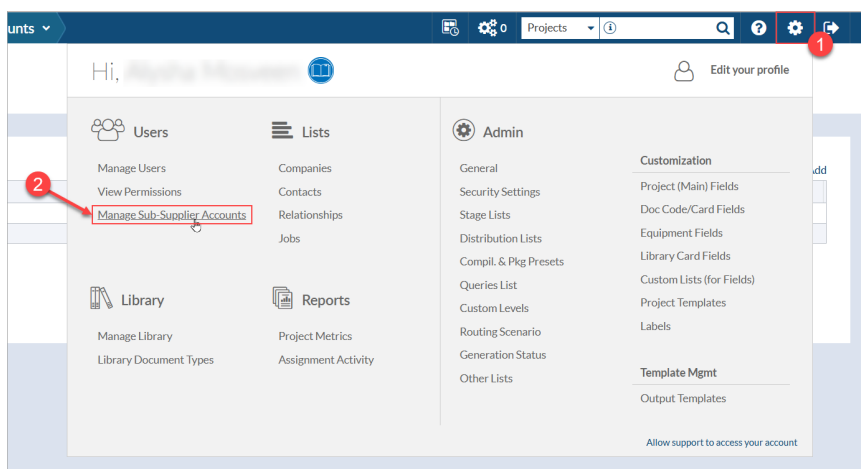
07/14/2025 9:42 am MDT

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:

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

1. Add sub-supplier account

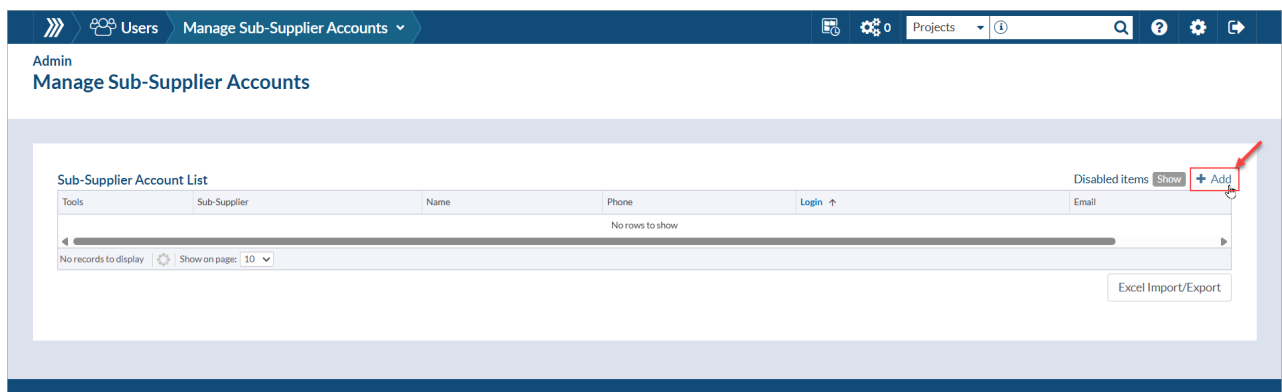
To add a sub-supplier account, navigate to **System Menu > Users > Manage Sub-Supplier Accounts**.



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.

Manage Sub-Supplier Accounts

Sub-Supplier Account List

Login	Sub-Supplier	Name	Email
No records to display			

Buttons: Collapse All, Expand All

Add Sub-Supplier Account

User Info

First Name *

Last Name *

Address

Phone

Time Zone

Select or type ahead...

System access

Set password

Buttons: Cancel, Save

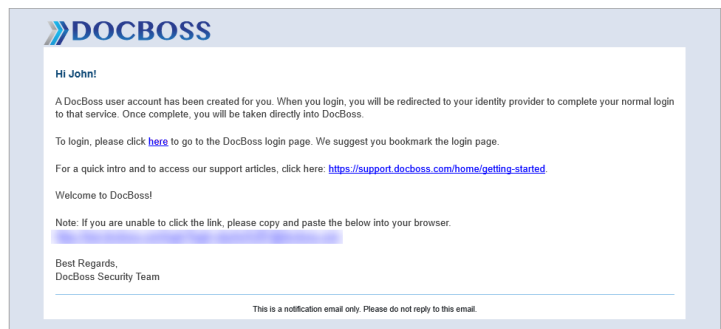
If desired, an invitation email can be sent to the user associated with the sub-supplier account.

Set password

☒ Send invitation email

☒ Force user to change password

☐ DISABLE account authentication



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.

Manage Sub-Supplier Accounts

Sub-Supplier Account List

Tools

Sub-Supplier

No records to display

Show on page: 10

Import/Export

Export File

Download Excel file

Upload File

Drag and drop new file

Or choose files from disk

Max upload size 400Mb

Buttons: Cancel, Import

Excel Import/Export



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

Once 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.

The screenshot shows the 'Project Template' settings page for 'Valve Project (0005678)'. The 'Project Template' dropdown is set to 'Omega: Default Project Fields Template (system)'. The 'Project Settings' section includes various dropdowns: 'Default EQ Number' (Tag), 'Stage List' (IFA), 'Default Level' (Order), 'Default Cover Page / Stamps' (Cover page only (no stamp)), 'Enforce Sub-Supplier Selection' (Yes), and 'Allow Sub-Supplier Access' (Yes). The 'Allow Sub-Supplier Access' dropdown is open, showing 'Yes' selected. A red arrow points to the 'Yes' option. The right sidebar contains 'Manual Cards Module' (No), 'Major Tags Module' (No), 'Enable Submittal CP Bookmark' (Yes), 'Submittal CP Bookmark Pattern' (<Title>), 'Exceptional handling default (for file uploads)' (Off), and 'Horizontal unit upload; sub-unit lettering' (Dedicated by Column (skip letter if column is empty)).

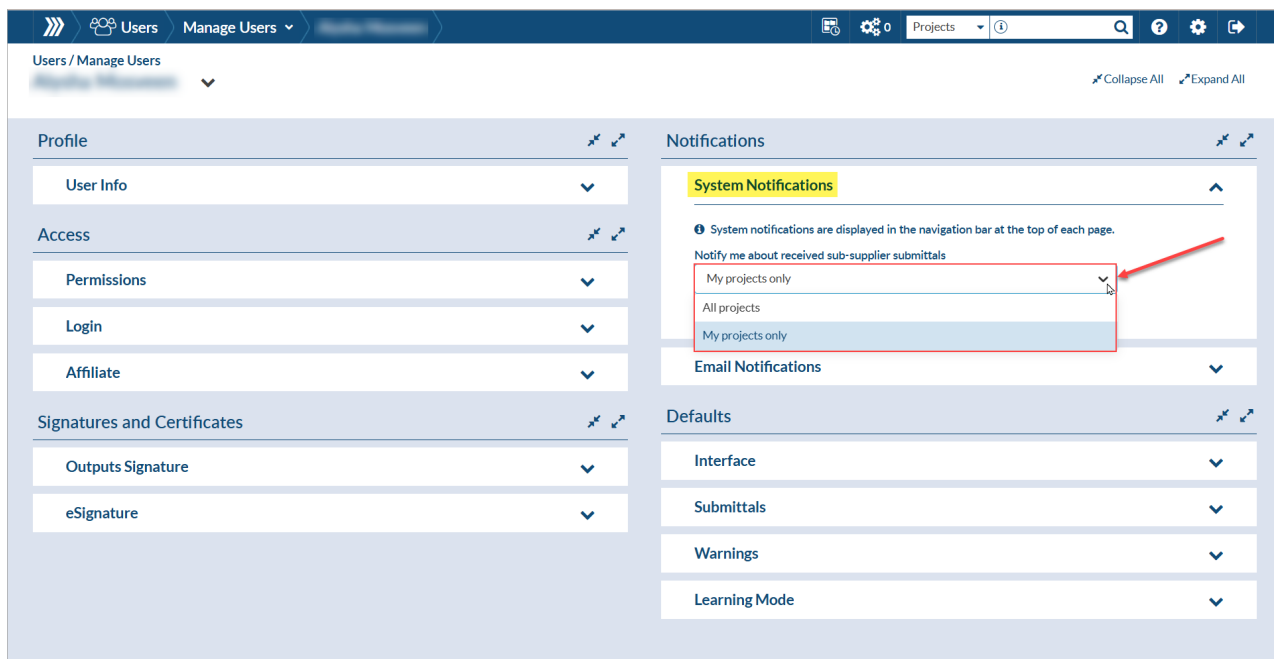


Before a project will display in the sub-supplier portal, the sub-supplier must be listed on **at least one** piece of tagged equipment OR a document must have the sub-supplier set in the override field.

Sub-supplier notifications

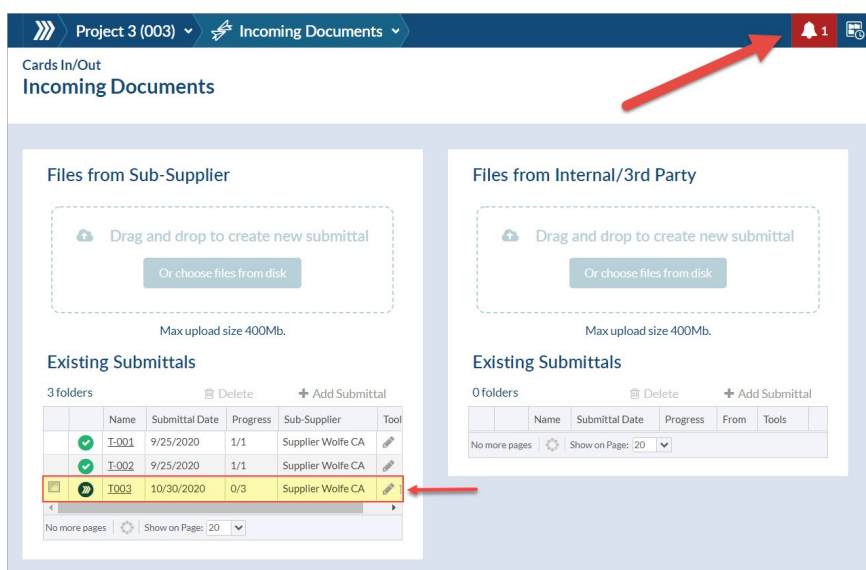
Users can specify if they would like to be notified about sub-supplier submittals (for all projects, or just their own projects).

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.



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.



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](#)).

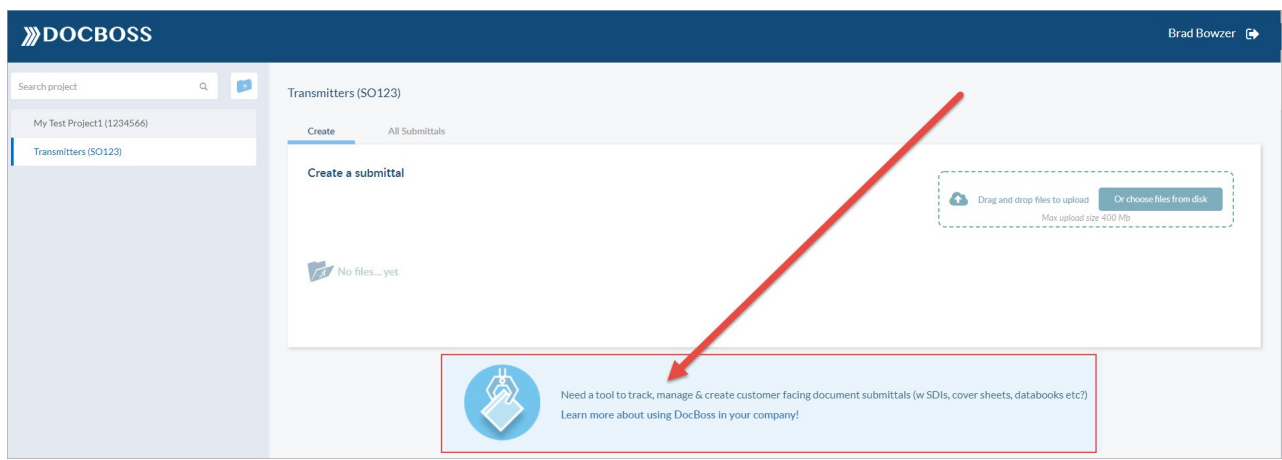
Sub-supplier portal security

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:



The screenshot displays the DocBoss sub-supplier portal. The top navigation bar includes the DocBoss logo and the user name 'Brad Bowzer'. The sidebar on the left shows a search project field and a list of projects, including 'My Test Project1 (1234566)' and 'Transmitters (SO123)'. The main content area is titled 'Transmitters (SO123)' and features a 'Create' tab and an 'All Submittals' tab. The 'Create a submittal' section includes a file upload area with a dashed border and a button 'Or choose files from disk'. A red arrow points to a promotional message box at the bottom of the main content area, which contains an icon of a hand holding a document and the text: '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!'. Below the main content area, there is a light blue banner with an information icon and the text: '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](#).