

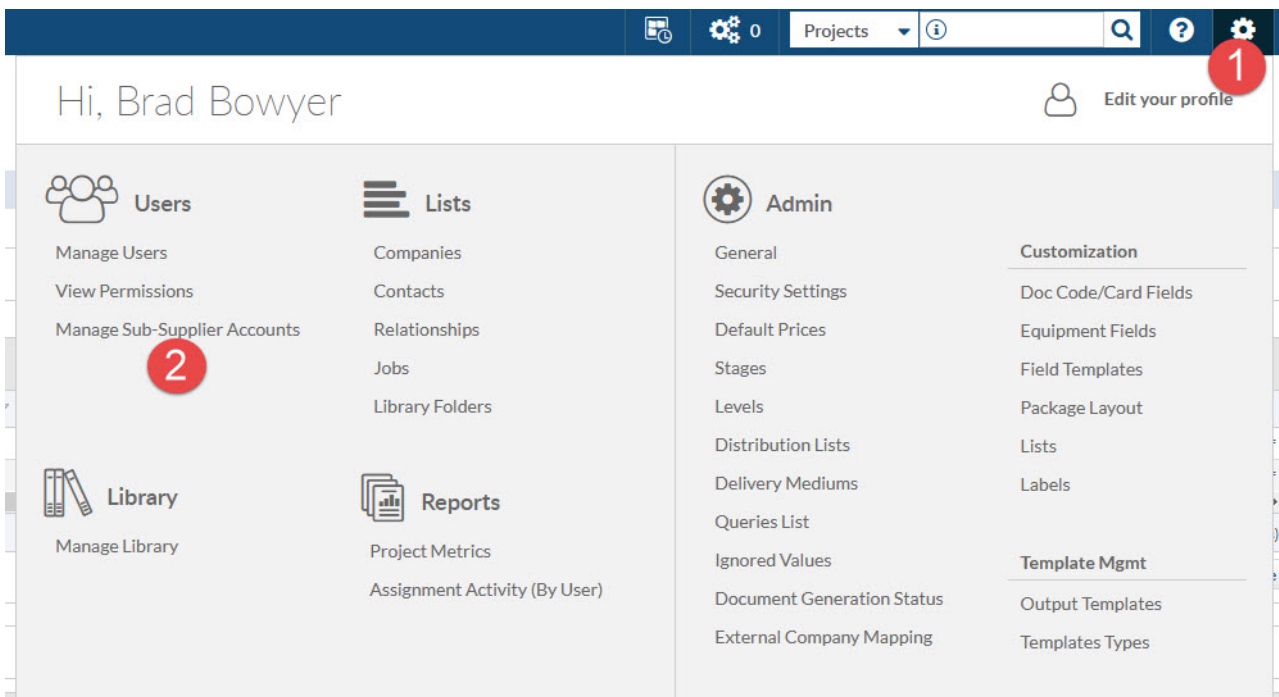
Sub-Supplier Portal (admin)

09/16/2024 1:33 pm MDT

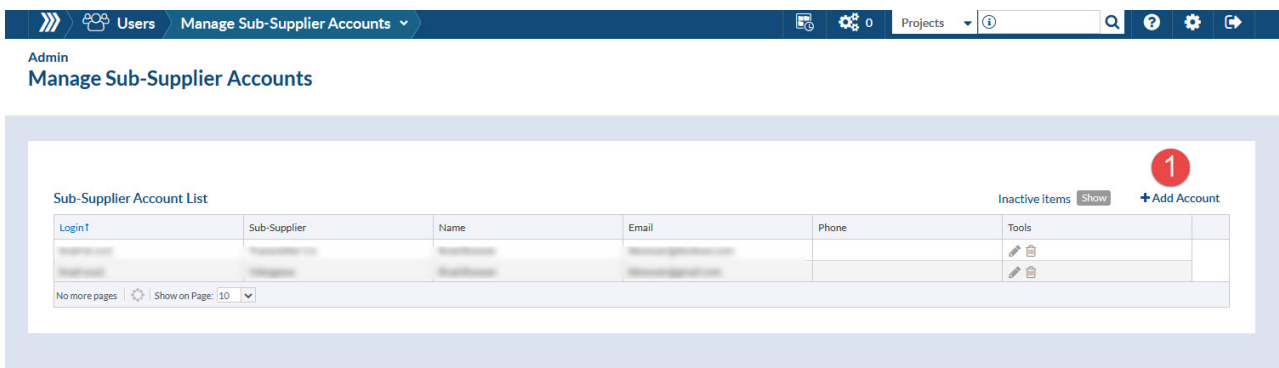
The sub-supplier portal provides a secure location for your vendors to upload (and download) documents directly into your DocBoss projects.

Add accounts for the sub-supplier

Navigate to the settings / sub-supplier area.



Add a new account



Fill in the details for the specific user account. You may have multiple accounts for each sub-supplier, but **each account will have access to all of the same sub-supplier projects** (automatic project lists).

Add Sub-Supplier Account

User info Collapse all Expand all

First Name *

Last Name *

Email *

Address

Phone

System access

Login *

Sub-Supplier *
Select or type ahead...

Set password

New password *

Confirm new password *

Cancel Save

Enable Sub-Supplier Access

Last step in order to make sure that the Projects are included in the sub-supplier account is to Allow Sub-Supplier Access in the Project Field Template.

Project 3 (003) Project Fields Template

Set Up

Project Field Template: Default Project Fields Template (system)

Project Settings

Default EQ Number	Tag	Manual Cards Module	Yes
Default Level	Order	Major Tags Module	No
Enforce Sub-Supplier Selection	Yes	Display Sheet Adder for Manual Cards	No
<u>Allow Sub-Supplier Access</u>	Yes	Sheet Adder Pattern	(Sheet <Sheet>
Enable Internal Approval Statuses	No	Enable Submittal CP Bookmark	No
Doc Contol role is mandatory	Yes	Submittal CP Bookmark Pattern	<Title>
Engineer role is mandatory	Yes		
Drafter role is mandatory	No		
Manager role is mandatory	Yes		
Remove sticky note drawing from PDFs	No		

*Note: Keep in mind that in order to show the Projects in the Sub-Supplier portal the Sub-Supplier needs to be

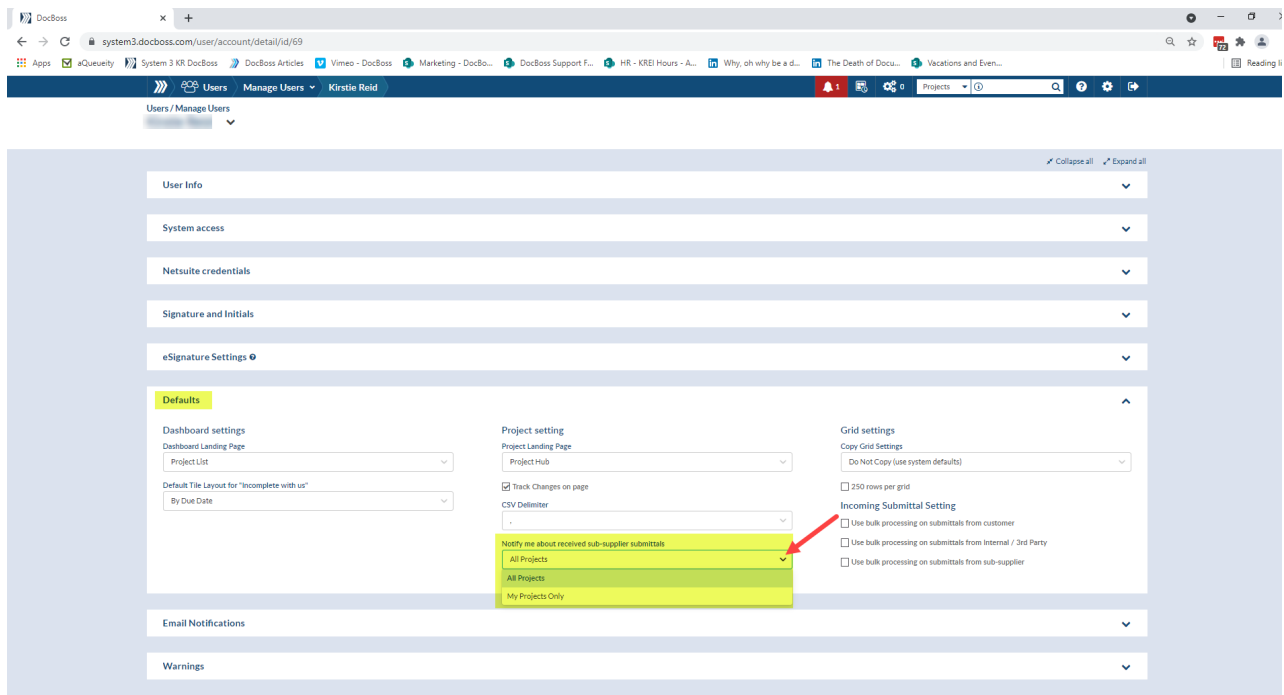
selected in the Equipment List.

Notifications

User Profile Notification Settings

Users can specify, on their user profile, if they want to be notified about sub-supplier submittals for all projects, or just their own projects.

Navigate to the User profile > Defaults and make the selection

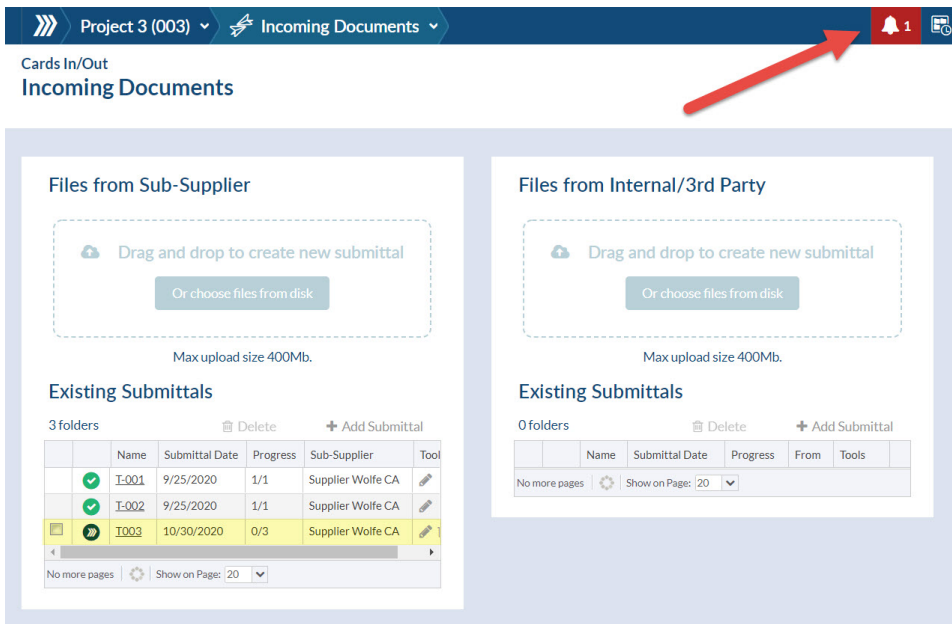


Submittal Notification

When a submittal has been sent by a sub-supplier a new notification icon will appear in red indicating the number of submittals received.

Clicking on the icon will open the Project List that will show a list of the projects that contain any submittal that has not been processed yet.

From there you can Navigate to the Incoming Documents > Files from Sub-Supplier grid where the new submittal will be placed.



Sub-Supplier Notification

Sub-suppliers, in their portal, will be notified in the same way - by new notification icon in red indicating the number of submittals received.

No emails will be sent unless "[Send transmittal email notification](#)" is selected during the submittal.

Security for sub-supplier accounts.

The same multi-factor security can be enabled for vendor accounts as for all accounts. [See this article](#) on how to enable MFA for specific roles (sub-supplier is a role you can add).

DocBoss Messaging on Sub-Supplier Portal

The use of the vendor portal is included in your DocBoss subscription, and simply requires that you provision an account to your vendor.

Note that in exchange for this function, a small advertisement is placed below the portal grids. It encourages vendors to consider DocBoss for their own use.

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

Example:



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!

Location:

The screenshot displays the DocBoss web application. At the top, the DocBoss logo and user name 'Brad Bowzer' are visible. The sidebar on the left shows a search bar 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 a submittal' form. The form includes a dashed box for file uploads with the text 'Drag and drop files to upload' and 'Or choose files from disk', along with a note 'Max upload size 400 Mb'. Below the form, it says 'No files... yet'. At the bottom of the page, there is a promotional banner with the same icon and text as seen in the top banner. A red arrow points from this banner to the 'Create a submittal' form.

For a view of the portal from the supplier perspective, [click here](#).

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