

Sub-Supplier Portal (Admin)

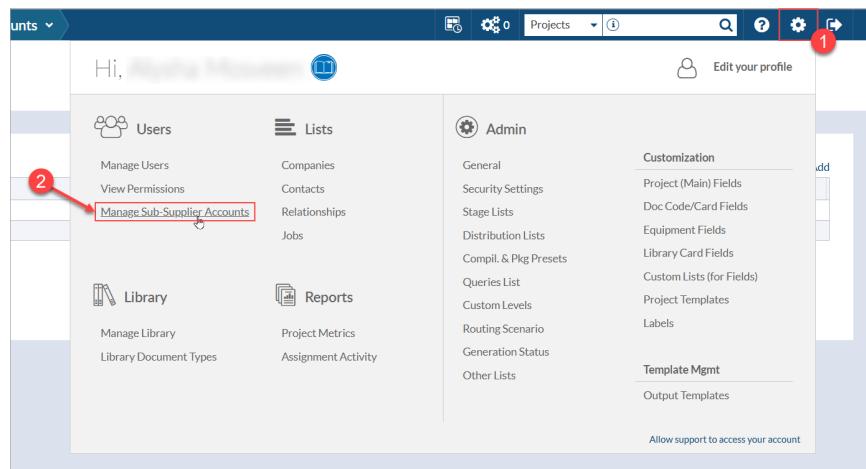
01/19/2026 5:04 pm MST

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.

A screenshot of the 'Manage Sub-Supplier Accounts' page. The top navigation bar shows 'Users > Manage Sub-Supplier Accounts'. The main content area is titled 'Sub-Supplier Account List' and contains a table with columns for 'Tools', 'Sub-Supplier', 'Name', 'Phone', 'Login', and 'Email'. A red box highlights the '+ Add' button in the top right corner of the table header. The table shows 'No rows to show'.

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.

The screenshot shows the 'Manage Sub-Supplier Accounts' page. A modal window titled 'Add Sub-Supplier Account' is open, prompting for user information. The fields for 'First Name' and 'Last Name' are required and highlighted with red boxes. Other fields like 'Address', 'Phone', 'Time Zone', 'System access', and 'Set password' are also present but not highlighted.

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

The screenshot shows the 'Set password' step of account creation. A red arrow points to the 'Send invitation email' checkbox. To the right, a sample invitation email is shown, addressed to 'Hi John!', with a link to the DocBoss login page.

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.

The screenshot shows the 'Manage Sub-Supplier Accounts' page with the 'Import/Export' modal open. The modal has two sections: 'Export File' (with a 'Download Excel file' button) and 'Upload File' (with a 'Drag and drop new file' area and a 'Or choose files from disk' button). Numbered arrows point to: 1) the 'Excel Import/Export' button in the bottom right of the modal, 2) the 'Download Excel file' button in the 'Export File' section, and 3) the 'Or choose files from disk' button in the 'Upload File' section.



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 Configuration**. From the "Advanced" tab, choose "Yes" for the "Allow Sub-Supplier Access" option.

The screenshot shows the 'Project Configuration' screen for 'Pump Project (1234)'. The 'Advanced' tab is selected. In the 'Workflow' section, under 'Submittals', there is a dropdown menu for 'Allow sub-supplier access' with three options: 'No', 'Yes', and 'No'. The 'Yes' option is highlighted with a red box and a red arrow points to it, indicating it should be selected. Other settings shown include 'Exceptional handling default (for file uploads)' set to 'Off' and 'Require recipient to authenticate when accessing submittals' set to 'Yes'.

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 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.

Profile

User Info

Access

Permissions

Login

Affiliate

Signatures and Certificates

Outputs Signature

eSignature

Notifications

System Notifications

Notify me about received sub-supplier submittals

My projects only

All projects

My projects only

Email Notifications

Defaults

Interface

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) > Incoming Documents

Cards In/Out

Incoming Documents

Files from Sub-Supplier

Drag and drop to create new submittal

Or choose files from disk

Max upload size 400Mb.

Existing Submittals

Folder	Name	Submittal Date	Progress	Sub-Supplier	Tools
	T-001	9/25/2020	1/1	Supplier Wolfe CA	
	T-002	9/25/2020	1/1	Supplier Wolfe CA	
	T-003	10/30/2020	0/3	Supplier Wolfe CA	

Files from Internal/3rd Party

Drag and drop to create new submittal

Or choose files from disk

Max upload size 400Mb.

Existing Submittals

Folder	Name	Submittal Date	Progress	From	Tools



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](#)).

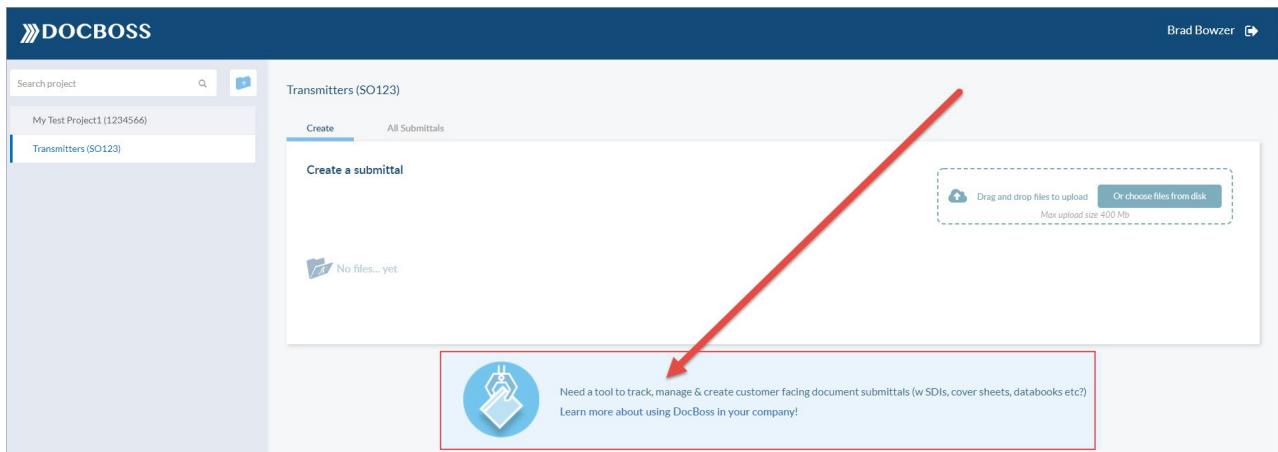
Sub-supplier portal security

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 shows the DocBoss sub-supplier portal interface. At the top, there is a navigation bar with the DocBoss logo, a search bar, and a user profile for Brad Bowzer. Below the navigation bar, the main content area is titled "Transmitters (SO123)". It features a "Create" button and a "Create a submittal" button. A large red arrow points from the "Create a submittal" button area down to a promotional message. The message is enclosed in a red box and includes a circular icon with a keyhole and a lock. The text reads: "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](#).