

Comments (workflow specific)

01/07/2026 5:09 pm MST

There is a distinction in DocBoss between **Comments** and **Markups**.

Comments are not embedded in the document. They are a generic area to add descriptive text about the file. If specific reference to the document is required, markups are a better tool.

After the submittal is finished, the comments are pushed into a historical area. they are not shown directly on the assign screen.

There are 3 comment fields:

CUSTOMER and SUB-SUPPLIER comments are designed to be added to cover pages/transmittals.

INTERNAL comments are NEVER included in submittals (even internal submittals). They are for internal record keeping/communication only.

Processing
147569-E09-0001-001.pdf
Viewer **Off** History

Comments

Comments for NEXT ACME transmittal

Drag and drop new file Or choose files from disk

Comments for NEXT Sub-Supplier transmittal

Drag and drop new file Or choose files from disk

Internal Comments

Drag and drop new file Or choose files from disk

Cancel Save

File Staging Area Viewer **Off**
You can upload multiple files and keep them here while you decide where to place them. Maximum file upload size is 400Mb.
Drag and drop files
Or choose files from disk

Unassigned 1 Assigned 0 Transmittal Doc 0

Unassigned Files
Mark as Transmittal Download Delete
File Name! Pages Tools
147569-E09-0001-001.pdf 28
No more pages Show on Page: 20

Assign to: Document Cards Obsolete Cards
Drag and drop files into document cards
Doc Code Select or type ahead... Search
Out of Workflow Show Merged Show Grid Row Colors

	Doc Code	Wolfe PA Doc #	Doc Code Name
	B06	1234-5678-B06-0001-001	Table Of Contents
	D16	1234-5678-D16-0001-001	Instrument Data Sheet
	D26	1234-5678-D26-0001-001	Hydrostatic Test Procedure
	D27	1234-5678-D27-0001-001	Bill Of Material
	I04	1234-5678-I04-0001-001	Inspection and Test Plan

No more pages Show on Page: 20

Customer and Sub-supplier Comments

If you wish to add additional information (i.e. explain changes made to the document), users can insert their comments into these field and they will be added into the cover page template.

CRPO (1234-5678) Incoming Documents From ABB: 2019-12-26_162030

Cards In/Out / Incoming Documents
From ABB: 2019-12-26_162030

Processing
1234-5678-D16-0001-001.pdf
Viewer Off History

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D26	1234-5678-D26-0001-001	Hydrostatic Test Procedure
D27	1234-5678-D27-0001-001	Bill Of Material

No more pages Show on Page: 10

Unassigned Files
Mark as Transmittal Download Delete

File Name	Pages	Tools
1234-5678-D16-0001-001.pdf	28	

No more pages Show on Page: 20

Comments

Comments for NEXT ACME transmittal
Section 2 - Modified as per comments
Drag and drop new file Or choose files from disk

Comments for NEXT Sub-Supplier transmittal
Drag and drop new file Or choose files from disk

Internal Comments
Drag and drop new file Or choose files from disk

Custom Field(s)
Document Comment

Cancel Save

Client Contract No 2019/1234567	Project Title: CRPO Project	Doc. No. 1234-5678-D16-0001	Rev. 0
End User PO No. 442085	Doc Title: Instrument Data Sheet	Sheet 2 Of 28 Date: 27.12.2019	

REVISION RECORD SHEET

Rev	Date	Description	Brief Description of Change
0	27.12.2019	Issued For Information	Section 2 - Modified as per comments

Variables available for cover page templates are:

- <Document_CustomerComment> for customer field.
- <Document_SubSupplierComment> for sub-supplier field.

When to add comments

Comments can be added during the assign process, directly on the Card through the "Edit" button or while completing an action on the Outstanding Actions grid.

Note that all of these Comment Fields are designed to be cleared after each submittal, so you can add new comments for each revision.

Be assured the comments won't disappear, they are specific to a workflow, so once the submittal is created they are moved to "Saved Comments".

The screenshot shows a software interface for document processing. At the top, it says 'Incoming Documents' and 'From ABB: 2019-12-27_145010'. The main area is titled 'Assign to: Document Cards' and 'Obsolete Cards'. A 'Doc Code' field is set to 'Select or type ahead...'. A table of document cards is visible, with columns for 'Doc Code', 'Wolfe PA Doc #', and 'Doc Code Name'. A modal window titled 'Document Comments 147569-E09-0001-001.pdf' is open, showing a table of comments. A red arrow points from the 'Saved Comments' section to the modal window.

Document Comments 147569-E09-0001-001.pdf

Legend: ☐ Internal Comments ☐ ACME Comments ☐ Sub-Supplier Comments

Recorded Date	User	Comment
- TRNSM Number: T-019 - Now		
12-27-2019 16:04:31	tunde@docboss.com	Temperature and Design ratings changed as per comments
- TRNSM Number: From the beginning - T-019 [ACME]Section 2 - Modified as per comments		
12-27-2019 14:20:...	tunde@docboss.com	Section 2 - Modified as per comments

No more pages | Show on Page: 20



If comments are included on the SDI, the comment associated with the **latest** submittal will remain visible until the file is returned. Once returned, the comment will be cleared and a new comment (associated with the next submittal) will be visible (if applicable).

<DocumentsByIndex.Document_Comment> for customer field.

<DocumentsByIndex.Document_SubSupplier_Comment> for sub-supplier field.

Internal Comments

Internal comments can be used to add additional information that your team can see when receiving the document through workflow.

These comments too are moved to “Saved Comments” once the document is sent internally.

CRPO (1234-5678)

Incoming Documents

From ACME Engineering: T009

Cards In/Out / Incoming Documents

From ACME Engineering: T009

To Match 2 Apply Status & Routing 0

File Staging Area

Viewer OFF

You can upload multiple files and keep them here while you decide where to place them. Maximum file upload size is 400Mb.

Drag and drop files

Or choose files from disk

To Match 2

Matched 0

Transmittal Doc 0

To Match Files

Run Matching

Mark as Transmittal

Download

Delete

File Name
147569-E09-0001-001 rev. 0.pdf
147569-E09-0001-001.pdf

No more pages Show on Page: 20

Match Files to:

Document Cards Obsolete Cards

Drag and drop files into document cards

Doc Code

Select or type ahead...

Search

Out of Workflow

Show

Merged

Show

Grid Row Colors

Doc Code	Wolfe PA Doc #	Doc Code Name
A01	1234-5678-A01-0001-001	Document Register
B02	1234-5678-B02-0001-001	Vendor Document Register
B06	1234-5678-B06-0001-001	Table Of Contents
C02	1234-5678-C02-0001-001	NDE Procedures
D26	1234-5678-D26-0001-001	Hydrostatic Test Procedure
D27	1234-5678-D27-0001-001	Bill Of Material
I03	1234-5678-I03-0001-001	Quality Plan
I04	1234-5678-I04-0001-001	Inspection and Test Plan
K03	1234-5678-K03-0001-001	Recommended Spare Parts
K05	1234-5678-K05-0001-001	Operating and Maintenance

Select Page: A01 - K05 [10] Show on Page: 10

Processing

147569-E09-0001-001 rev. 0.pdf

Viewer OFF

History

Comments

Comments for NEXT ACME transmittal

Drag and drop new file

Or choose files from disk

Comments for NEXT Sub-Supplier transmittal

Drag and drop new file

Or choose files from disk

Internal Comments

Check comments and please include NDE Tests - MT & UT

Drag and drop new file

Or choose files from disk

Saved Comments

No comments in current document workflow

See comments from previous workflow

Cancel

Match Only

Match & Apply Status & Routing

NOTE: If you are looking for a "Standing Comment" you should enable a custom field for the card. It will keep whatever comment is added forever (until changed).

A typical use case for this kind of comment would be "This document supersedes document XX". This comment should remain for the entire life of the document.

CRPO (1234-5678)

Incoming Documents

From ABB: 2019-12-26_162030

Cards In/Out / Incoming Documents

From ABB: 2019-12-26_162030

Unassigned 1 Assigned 0 Transmittal Doc 0

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Assigned 0

Transmittal Doc 0

Unassigned Files

Mark as Transmittal

Download

Delete

File Name	Pages	Tools
1234-5678-D16-0001-001.pdf	28	

No more pages Show on Page: 20

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1234-5678-D16-0001-001.pdf

Viewer OFF

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Comments for NEXT Sub-Supplier transmittal

Drag and drop new file

Or choose files from disk

Internal Comments

Drag and drop new file

Or choose files from disk

Custom Field(s)

Document Comment

Revision 2: Modified points 3.5, 3.6 and 3.7 Design and Temperature Calculations

Cancel

Save