

Comments (workflow specific)

01/07/2026 5:09 pm MST

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

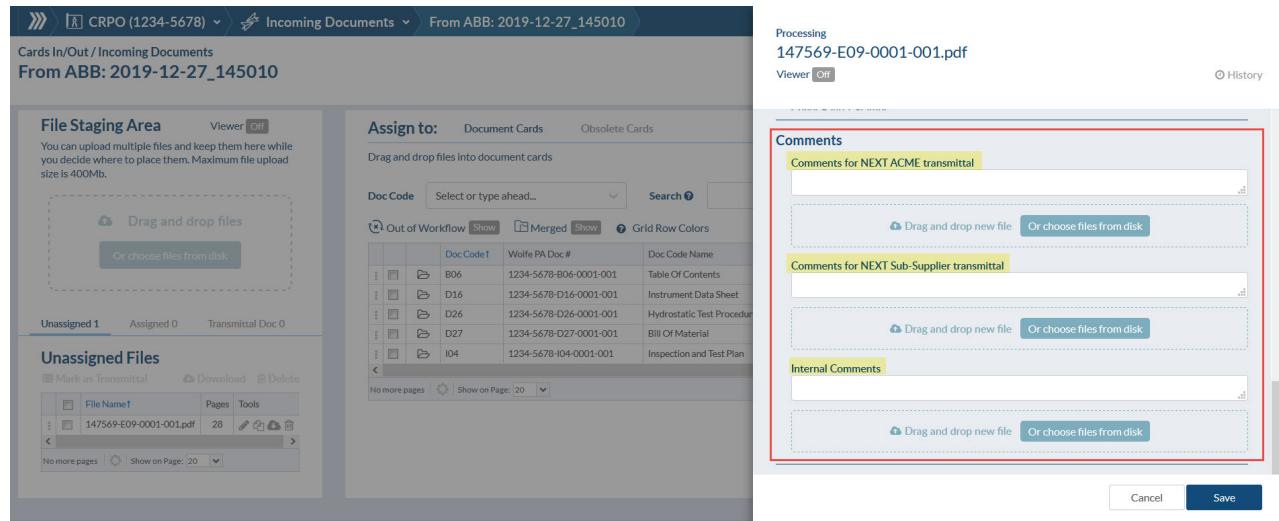
Comments are not embedded in the document. They are a generic area to add descriptive text about the file. If specific reference to the document is required, markups are a better tool.

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.



The screenshot shows the DocBoss software interface. At the top, it displays 'CRPO (1234-5678) > Incoming Documents > From ABB: 2019-12-27_145010'. Below this, the 'File Staging Area' allows users to drag and drop files or choose files from disk. The 'Assign to' section lists 'Document Cards' and 'Obsolete Cards' with a search bar and filters for 'Doc Code', 'Out of Workflow', 'Merged', and 'Grid Row Colors'. The 'Unassigned Files' section shows a table with columns for 'Doc Code', 'Wolfe PA Doc #', 'Doc Code Name', and file details. The right side of the interface is highlighted with a red box, focusing on the 'Comments' section. This section contains three text input fields: 'Comments for NEXT ACME transmittal', 'Comments for NEXT Sub-Supplier transmittal', and 'Internal Comments'. Each field has a 'Drag and drop new file' or 'Or choose files from disk' button. At the bottom right, there are 'Cancel' and 'Save' buttons.

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.

File Staging Area

Assign to: Document Cards Obsolete Cards

Comments

Comments for NEXT ACME transmittal

Section 2 - Modified as per comments

Comments for NEXT Sub-Supplier transmittal

Internal Comments

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".

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

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

See comments from previous workflow

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

Cancel Save



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 1 147569-E09-0001-001.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	Doc Code I	Wolfe PA Doc #	Doc Code Name
A01	1234-5678-A01-0001-001	Document Register	Document Register
B02	1234-5678-B02-0001-001	Vendor Document Register	Vendor Document Register
B06	1234-5678-B06-0001-001	Table Of Contents	Table Of Contents
C02	1234-5678-C02-0001-001	NDE Procedures	NDE Procedures
D26	1234-5678-D26-0001-001	Hydrostatic Test Procedure	Hydrostatic Test Procedure
D27	1234-5678-D27-0001-001	Bill Of Material	Bill Of Material
I03	1234-5678-I03-0001-001	Quality Plan	Quality Plan
I04	1234-5678-I04-0001-001	Inspection and Test Plan	Inspection and Test Plan
K03	1234-5678-K03-0001-001	Recommended Spare Parts	Recommended Spare Parts
K05	1234-5678-K05-0001-001	Operating and Maintenance	Operating and Maintenance

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

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

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 1 1234-5678-D16-0001-001.pdf Pages 28 Tools

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

No more pages Show on Page: 10

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

Custom Field(s)

Document Comment

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

Cancel Save