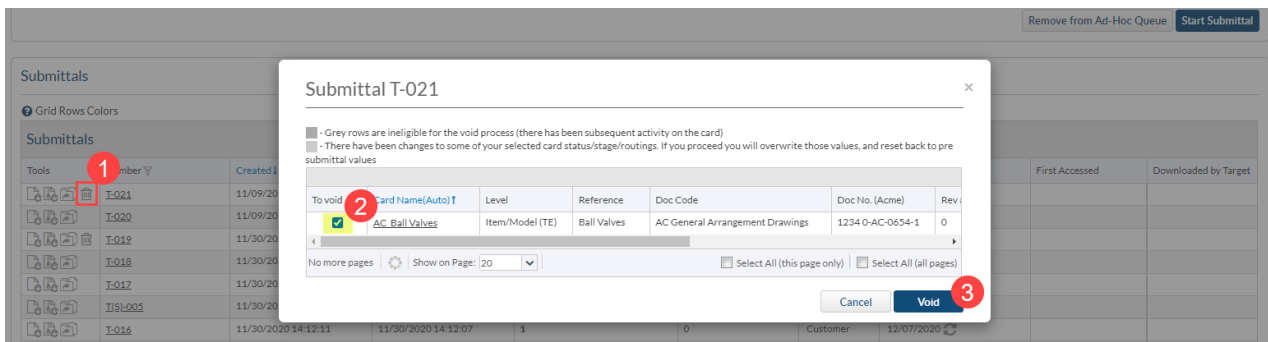# What if my Customer doesn't want the document I just submitted?
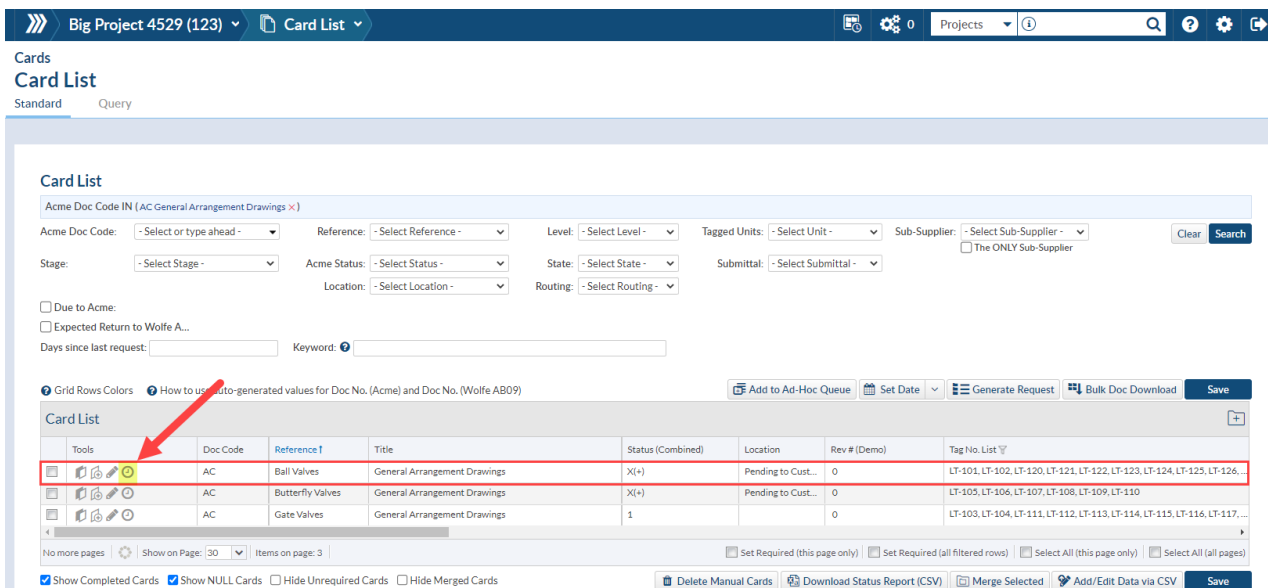
07/23/2024 3:35 pm EDT

If you have resubmitted a document and your customer decides they don't need it and asks you to just use the last approved document instead, how do you handle this in DocBoss?

The first step is to void the outgoing submittal.

Next, navigate to the Card List and click on the History icon.

In the history screen, revert the file and metadata back to the line when the file was returned "approved" from the customer.

4529KR-AC-654-01 (AC_Ball Valves)

Viewer **On** | **View file** | Compare files

Files   Requests to Supplier

⚙ Cover Page Test

File History

(Y) Entries displayed on cover pages [Show]   ❓ Grid Row Colors

🗗 Move active file to a different card   ✏ Edit Card

View1	Recorded ↓	Tools	Active SEND record	Active RETURN record	System Comments	Stage	Status	State	Original Doc Link
⦿	11/09/2021 13:41:57				Document was voided from submittal. Status is reverted back to X	IFA	X(+)	A	1234 0-AC-0654-1_Rev0_Sub004.pdf
○	11/09/2021 13:40:14	🗐🗐✏	Ⓝ		Document was submitted in T-021	IFA	X+	A	1234 0-AC-0654-1_Rev0_Sub005.pdf
○	11/09/2021 13:39:40	🗐🗐✏				IFA	X(+)	A	1234 0-AC-0654-1_Rev0_Sub004.pdf
○	11/09/2021 13:39:25	🗐🗐✏		Ⓨ		IFA	1	A	1234 0-AC-0654-1_Rev0_Sub004.pdf
○	11/09/2021 13:35:39	🗐🗐✏	Ⓨ		Document was submitted in T-020	IFA	X+	A	1234 0-AC-0654-1_Rev0_Sub004.pdf
○	11/09/2021 13:35:05	🗐🗐✏		Ⓨ		IFA	X(+)	A	1234-AC-0001-1_Rev000_Sub003.pdf
○	11/09/2021 13:35:01	🗐🗐✏			Stage list was changed from edit popup.	IFA	X(+)	A	1234-AC-0001-1_Rev000_Sub003.pdf
○	11/09/2021 13:31:37	🗐🗐✏				AB	X(+)	A	1234-AC-0001-1_Rev000_Sub003.pdf
○	06/23/2021 09:09:12	🗐🗐✏			Updated from card list	AB	1	A	1234-AC-0001-1_Rev000_Sub003.pdf
○	11/25/2020 07:47:28	🗐🗐✏			Updated from card list	AB	1	A	1234-AC-0001-1_Rev000_Sub003.pdf

Select Page: [11/09/2021 13:41:57 - 11/25/2020 07:47:28 ▽] ⚙ Show on Page: [10 ▽]

View 1 11/09/2021 13:41:57 (latest) Status: X(+) Rev: 0   ☁

‹ Page 1/3 › | 🔍 🔍   47% ↕   🗐 | ⭳ | ⬛ | ✏0

Once you've finished these steps, make sure that the last history line is the one that contains the file returned from the customer (you can click on Doc+CP Link to view the file that is now attached).

4529KR-AC-654-01 (AC_Ball Valves)

Viewer **On** | **View file** | Compare files

Files   Requests to Supplier

⚙ Cover Page Test

File History

(Y) Entries displayed on cover pages [Show]   ❓ Grid Row Colors

🗗 Move active file to a different card   ✏ Edit Card

View1	Recorded ↓	Tools	Active SEND record	Active RETURN record	System Comments	Doc+CP Link	Stage
○	11/09/2021 13:47:55				Document was reverted to previous revision 2021-11-09 13:39:25 (full reversion)	1234 0-AC-0654-1_Rev0_Sub004.pdf	IFA
⦿	11/09/2021 13:41:57	🗐🗐✏			Document was voided from submittal. Status is reverted back to X	1234 0-AC-0654-1_Rev0_Sub004.pdf	IFA
○	11/09/2021 13:40:14	🗐🗐✏	Ⓝ		Document was submitted in T-021	1234 0-AC-0654-1_Rev0_Sub005.pdf	IFA
○	11/09/2021 13:39:40	🗐🗐✏				1234 0-AC-0654-1_Rev0_Sub004.pdf	IFA
○	11/09/2021 13:39:25	🗐🗐✏		Ⓨ		1234 0-AC-0654-1_Rev0_Sub004.pdf	IFA
○	11/09/2021 13:35:39	🗐🗐✏	Ⓨ		Document was submitted in T-020	1234 0-AC-0654-1_Rev0_Sub004.pdf	IFA
○	11/09/2021 13:35:05	🗐🗐✏		Ⓨ		1234-AC-0001-1_Rev000_Sub003.pdf	IFA
○	11/09/2021 13:35:01	🗐🗐✏			Stage list was changed from edit popup.	1234-AC-0001-1_Rev000_Sub003.pdf	IFA
○	11/09/2021 13:31:37	🗐🗐✏				1234-AC-0001-1_Rev000_Sub003.pdf	AB
○	06/23/2021 09:09:12	🗐🗐✏			Updated from card list	1234-AC-0001-1_Rev000_Sub003.pdf	AB

Select Page: [11/09/2021 13:47:55 - 06/23/2021 09:09:12 ▽] ⚙ Show on Page: [10 ▽]

Also double check that the cards status is now the approved status and that there are no routings set.

Cards
Card List
Standard   Query

Processing
1234 0-AC-0654-1_Rev0_Sub004.pdf
Viewer Off

Card List
Acme Doc Code IN (AC General Arrangement Drawings ✕)

Acme Doc Code:	- Select or type ahead - ⌄	Reference: - Select Reference - ⌄	Level: - Select Level - ⌄

Status & Routing

Stage List *   ✏ Select different stage list
IFA

Stage: - Select Stage - ⌄   Acme Status: - Select Status - ⌄   State: - Select State - ⌄

Stage *   ✏ Edit Stages
IFA

Location: - Select Location - ⌄   Routing: - Select Routing - ⌄

☐ Due to Acme
☐ Expected Return to Wolfe A...

Doc Status *
1 - Approved   ⌄ ②

Days since last request: Keyword: ❓

❓ Grid Rows Colors   ❓ How to use auto-generated values for Doc No. (Acme) and Doc No. (Wolfe AB09)

Card List

Tools	Doc Code	Reference ↕	Title	Status (Combined)
☐ 📄📋✏🕐	AC	Ball Valves	General Arrangement Drawings	X(+)
☐ 📄📋✏🕐	AC	Butterfly Valves	General Arrangement Drawings	X(+)
☐ 📄📋✏🕐	AC	Gate Valves	General Arrangement Drawings	1

No more pages   Show on Page: 30 ⌄   Items on page: 3

☑ Show Completed Cards ☑ Show NULL Cards ☐ Hide Unrequired Cards ☐ Hide Merged Cards   🗑 Delete

Filter Set: - Select Filter Set - ⌄   ➕ Create Filter Set   📋 Update Filter Set   ✏ Edit Filter Set   🗑 Delete Filter Set

Internal (User) Routing ❓

☐ Doc Control User
Kirstie Reid   ⌄

☐ Project Engineer User
Kirstie Reid   ⌄

☐ Drafting User
- Select User -   ⌄

☐ Project Manager User
Kirstie Reid

Cancel   Save ③

This will put the card back to it's state before it was resubmitted.