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.

										Remove from Ad-Ho	c Queue Start Submittal
Submittals			Submittal T-021					×	1		
Grid Rows Co	olors		-								
Submittals						activity on the card) ings. If you proceed you will overwrite thos	e values, and reset back	to pre			
Tools	1 mber ♥	Created I	submittal values							First Accessed	Downloaded by Target
B B C	<u>T-021</u>	11/09/20	To void Card Name(Auto) 1	Level	Reference	Doc Code	Doc No. (Acme)	Revi			
	<u>T-020</u>	11/09/20	AC Ball Valves	Item/Model (TE)	Ball Valves	AC General Arrangement Drawings	1234 0-AC-0654-1	0			
	<u>T-019</u>	11/30/20	4					Þ			
BBB	<u>T-018</u>	11/30/20	No more pages 🛛 🛟 🛛 Show on Page	: 20 🗸		Select All (this page	only) 📗 Select All (all	pages)			
BBD	<u>T-017</u>	11/30/20						-0			
BBD	<u>T(S)-005</u>	11/30/20					Cancel Vo	oid 🧡			
	<u>T-016</u>	11/30/2020	14:12:11 11/30/2020 14:12:01	1		0 Cus	tomer 12/07/20	20 😴			

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

Big F	Project 45	29 (123) 🗸	🜔 Card List 👻)							E. 4	280 P	rojects	• (i)		Q ?	٥
s																	
d List																	
ard	Query																
Card List																	
Acme Doc C	ode IN (AC Ge	eneral Arrangement D	rawings ×)														
Acme Doc Co	ode: - Sele	ct or type ahead -	 Reference: 	- Select Reference -	~ I	evel: - Sel	ect Level - 🔹	 Tagge 	ed Units:	- Select Unit	t- 🗸	Sub-Supplie	er: - Select	Sub-Supplier -	~	Clear	Sear
tage:	Calar	ct Stage -	✓ Acme Status:	- Select Status -	× 9	itate: - Sel	ect State -		- here it to be	- Select Sub	mittal to		The C	NLY Sub-Supplier			
tage:	- Selec	ct Stage -		- Select Status -			ect State -		ubmittai:	- Select Sub	mittai - 🗸						
Due to Ac	me:		Eocation.	- Select Education -	* Rot	iung sei	eer Kouting -										
	Return to Wolf	fe A															
ays since las	st request:		Keyword: 😢														
Grid Rows	Colors 🔞 H	low to use outo-gen	erated values for Doc No.	(Acme) and Doc No. (Wo	lfe AB09)				Add	to Ad-Hoc C	Queue 🛗 S	et Date 🗸	Gene	rate Request	Bulk Doc Do	wnload	Save
Card List																	E
Tools		Doc Code	Reference †	Title			Status (Co	mbined)	Locat	ion	Rev # (Demo		Tag No. List	Å			
• ¢¢	e 🖉 🕑	AC	Ball Valves	General Arrangement Dr	awings		×(+)		Pend	ing to Cust	0		LT-101, LT-1	02, LT-120, LT-12	1, LT-122, LT-123,	LT-124, LT-12	5, LT-120
• ¢¢	e 🖉 🕑	AC	Butterfly Valves	General Arrangement Dr	awings		X(+)		Pend	ing to Cust	0		LT-105, LT-1	.06, LT-107, LT-10	8, LT-109, LT-110		
• ¢¢	e 🖉 🕑	AC	Gate Valves	General Arrangement Dr	awings		1				0		LT-103, LT-1	04, LT-111, LT-11	2, LT-113, LT-114,	LT-115, LT-11	6, LT-117
<	Late L.								-					1.000			
No more page	s 🎲 Show	on Page: 30 🗸	Items on page: 3						Set Re	quired (this pa	ige only) 📃 :	Set Required (a	I filtered rov	vs) 📃 Select Al	I (this page only)	Select A	il (all page

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

Big Project 4529 (123) / Card History 4529KR-AC-654-01 (AC_Ball Valves)

Viewer On View file Compare files

) Ent	ries displayed on cov	er pages Sh	ow 🛛 😧 Grid Row C	olors			G e	Move ad	tive file to a different card 🛛 📝 Edit 🤇
liew1	Recorded L	Tools	Active 51 AD record	Active RETURN record	System Comments	Stage	Status	State	Original Doc Link
۲	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
0	11/09/2021 13:40:14	lig lig 🥢	N		Document was submitted in T-021	IFA	X+	A	12340-AC-0654-1 Rev0 Sub005.pdf
0	11/09/2021 13:39:40	10				IFA	X(+)	A	1234 0-AC-0654-1 Rev0 Sub004.pdf
0	11/09/2021 13:39:25			0		IFA	1	A	12340-AC-0654-1 Rev0 Sub004.pdf
0	11/09/2021 13:35:39	là 🖓 🖉	O		Document was submitted in T-020	IFA	X+	A	12340-AC-0654-1 Rev0 Sub004.pdf
0	11/09/2021 13:35:05	lig lig 🥒		0		IFA	X(+)	А	1234-AC-0001-1 Rev000 Sub003.pdf
0	11/09/2021 13:35:01	lig lig 🥒			Stage list was changed from edit popup.	IFA	X(+)	A	1234-AC-0001-1 Rev000 Sub003.pdf
0	11/09/2021 13:31:37	lig lig 🥒				AB	X(+)	A	1234-AC-0001-1 Rev000 Sub003.pdf
0	06/23/2021 09:09:12	là là 🖉			Updated from card list	AB	1	A	1234-AC-0001-1 Rev000 Sub003.pdf
0	11/25/2020 07:47:28	l 👌 l 🍓 🥒			Updated from card list	AB	1	A	1234-AC-0001-1 Rev000 Sub003.pdf
elect P.	ge: 11/09/2021 13:41:57	7 - 11/25/2020 (07:47:28 🗸 🔇 Sh	ow on Page: 10 🗸					

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).

_	Requests to Supplie	r					
							🕸 Cover Pag
ile l	listory						
) Ent	ries displayed on cov	er pages SH	ow 😗 Grid Row Co	blors		🔁 Move active f 🥃 to a differen	t card 🛛 🖉 Edit Card
View1	Recorded 4	Tools	Active SEND record	Active RETURN record	System Comments	Doc+CP Link	Stage
0	11/09/2021 13:47:55				Document was reverted to previous revision 2021-11-09 13:39:25 (full reversion)	12340-AC-0654-1 Rev0 Sub004.pdf	IFA
۲	11/09/2021 13:41:57	kg kg 🖉			Document was voided from submittal. Status is reverted back to X	1234 0-AC-0654-1 Rev0 Sub004,pdf	IFA
0	11/09/2021 13:40:14	ka ka 🥒	N		Document was submitted in T-021	1234 0-AC-0654-1 Rev0 Sub005.pdf	IFA
0	11/09/2021 13:39:40	10 10 1				1234 0-AC-0654-1 Rev0 Sub004.pdf	IFA
0	11/09/2021 13:39:25	ka ka 🖋		Ø		1234 0-AC-0654-1 Rev0 Sub004.pdf	IFA
0	11/09/2021 13:35:39	là là 🥒	Ø		Document was submitted in T-020	1234 0-AC-0654-1 Rev0 Sub004.pdf	IFA
0	11/09/2021 13:35:05	lè lè /		Ø		1234-AC-0001-1 Rev000 Sub003.pdf	IFA
0	11/09/2021 13:35:01	là là 🖋			Stage list was changed from edit popup.	1234-AC-0001-1 Rev000 Sub003.pdf	IFA
-	11/09/2021 13:31:37	lè lè /				1234-AC-0001-1 Rev000 Sub003.pdf	AB
0		66			Updated from card list	1234-AC-0001-1 Rev000 Sub003.pdf	AB

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

Cards Card List Stadad Query
Card List Stage List * Select different stage list Acme Doc Code IN (AC General Arrangement Drawings x) IFA Acme Doc Code: Select Stage * Celect stage Stage: Select Stage * Select State Location: Select State Doe to Acme: Select State Due to Acme: Select Return to Wolfe A
Card List IFA IFA Acme Doc Code IN (Ac General Arrangement Drawings ×) IFA IFA Acme Doc Code: Select or type ahead Reference - Select Reference - Level - Select Level - Select State Stage - Level - Select State Stage: Select Stage- Acme Status State: - Select State - Select Routing - Location - Select Location - Routing - Select Routing - Select Routing - Locator - Routing - Select
Acme Doc Code IN (AC General Arrangement Dravings x) Acme Doc Code: - Select Nage Stage: - Select Stage Stage: - Select Stage Location: - Select Status Due to Acme: Expected Return to Wolfe A
Acme Doc Code: - Select Or type ahead - • Reference - • Level: - Select Level - • Stage * Stage * IFA Stage: - Select Stage - • Acme Status: - Select Status - • State - Select State - • IFA Doc Status * Due to Acme: Expected Return to Wolfe A State - Select Routing - • Doc Status * 1- Approved
Stage: - Select Stage - Acme Status: - Select Status - State: - Select State - IFA Due to Acme: Location: - Select Location - Routing: - Select Routing - Doc Status * Due to Acme: I - Approved -
auge - Select States* Autor Sales* Sales* Sales* Doc Status* Due to Acme: Expected Return to Wolfe A Sales* Sales* 1- Approved
Due to Acme: Expected Return to Wolfe A Doc Status *
Due to Acme: Expected Return to Wolfe A
Days since last request: Keyword: •
Grid Rows Colors Daw to use auto-generated values for Doc No. (Acme) and Doc No. (Wolfe AB09) Internal (User) Routing
Tools Doc Code Reference 1 Title Status (Combined Kirstie Reid
Image: Constraint of the second se
Construction of the second secon
No more pages 🔘 Show on Page 30 💌 Items on page 3
🕼 Show Completed Cards 🔹 Show NULL Cards 📄 Hide Unrequired Cards 📄 Hide Merged Cards 👘 Delet - Select User -
Filter Set - Select Filter Set -
Project Manager User
Month Bald
Kiralo Dold

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