Approve Supplier Documents Internally

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Conduct internal document review directly in DocBoss

Receive, markup, and review supplier documents before sending them to customers or adding them to your databook.

What is internal approval?

Internal approval provides the option to internally review and status documents directly in the system. When enabled, each document must receive an 'approved' status internally before being sent to the customer.

This feature is particularly useful for companies who do engineering on behalf of their customer, but can prove useful in other scenarios that prompt the internal review of initial documents.

See internal approval in action

This video demonstrates how to set up internal approval, and walks you though an example workflow.

Simplify your internal review process

DocBoss simplifies your internal workflows by providing everything you need to conduct your review.

Get notified

Receive an email notification as soon as you've been assigned to review a document, making sure you don't miss a thing.

Internal statuses

Keep track of documents by applying internal statuses directly in DocBoss. The status options use *your* language, ensuring understanding amongst your team.

Apply markups

Want to apply your feedback directly to the document? We can do that. Open the document viewer and get out the red pen!

How to status a document

Applying an internal status to a document in review is easy!

Step 1: Navigate to your outstanding actions and open the document
Step 2: Analyze the document in the viewer, and assess whether or not the document requires further adjustment
Step 3: Select the appropriate status from the drop-down selector (e.g., approved, rejected, etc.)

Automate your workflow

Internal approval goes beyond the internal review of documents - automate every step of your workflow with DocBoss.

Notify your team

Notify the doc controller, project manager, or anyone else when internal review is complete - no need for external messages or emails.

Inform source of approval

Once a document is approved, you may want to let the source of the file (e.g., sub-supplier) know. You can set up your workflow to queue documents for submittal to the source before going to your customer.

End workflow after internal review

Don't want to send the file to your customer after internal review? The option to complete the workflow after internal review is available to you.

Update source

If the file was uploaded to the wrong drop zone, it's not a problem. The file source can be adjusted, ensuring it gets queued to the right place for further workflow.

Learn how internal approval can work for you

Book a personalized demo with one of our Product Specialists today to see how these features can be customized to suit your company's needs.

Or, check out our other features here.