

Record Sub-Supplier PO Number(s)

09/25/2026 4:38 pm MDT

Sub-suppliers often reference orders by their own PO number, not by the sales order number on the project. DocBoss allows you to record and show the sub-supplier's PO number on submittal emails and in the [sub-supplier portal](#).

Enable sub-supplier PO list

To enable sub-supplier PO tracking, navigate to **Project Menu > Set Up > Project Configuration**. Expand the **Supplier PO List** drop-down. There are three choices:

- **No** - sub-supplier POs are not being recorded (default)
- **Yes. Default default [SO]** - each sub-supplier PO number defaults to the project sales order number (displayed as a grey placeholder ("Use project SO value")) unless overwritten with a unique PO number
- **Yes** - each sub-supplier PO number is blank, and a unique value must be entered



If "Use Supplier POs" = Yes, a submittal to a sub-supplier whose PO has not been recorded will be prevented. The PO number can be entered directly in the pop-up, and the entered value will be recorded under **Project Configuration > Main > Supplier PO List**.

Company	PO Number
Wolfe Instruments	Enter here

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Cancel Save and Proceed

☒ Include hyperlink in email

By default, only the list of sub-suppliers that are "active" on the project will be listed. These are sub-suppliers that are either:

- assigned on the equipment list, and/or
- have been selected when receiving a sub-supplier submittal).

To see the full list of sub-suppliers in your system, switch the toggle to "All suppliers".

Pump Project (4531) **Project Configuration**

Set Up
Project Configuration

Main Advanced Fields & Equipment Types Compilation & Package Presets Expediting Info

Project Profile

Project Profile

Doc Code and Status Lists

Users and Key Contacts

Supplier PO List

Use Supplier POs

Yes

Project suppliers All suppliers

Company	PO Number
Wolfe Instruments	A1B2C3
Valve Company	123ABC

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Save

Where the number appears

- **Submittal emails** - the [SUB_SUPPLIER_PO_NUMBER] variable will output the sub-supplier PO number in either the email subject line or email body. For instructions on adding this variable to the email template, see this article: [Create a New Email Template](#).

Edit Template

Template type: Sub-Supplier Submittal

Subject

[INST_NAME] Submittal Notification - PO: [SUB_SUPPLIER_PO_NUMBER]

Html template

Submitted to: [TARGET]

Project Name: [PROJECT]

PO Number: [SUB_SUPPLIER_PO_NUMBER]

Job: [JOB]

- **Sub-supplier portal** - the project list a supplier sees in the portal now shows their PO number rather than the project name and sales order number.

Search project



123456



D4E5F6



G7H8I9