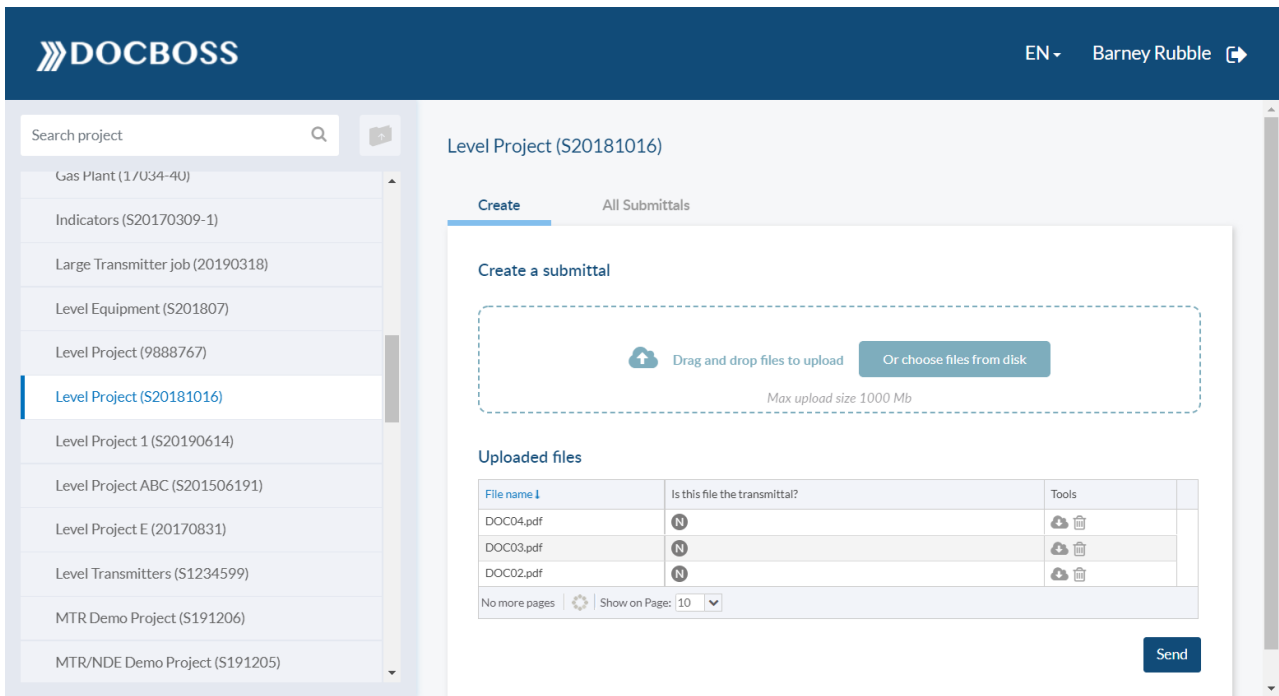


# Release - January 2022

07/17/2024 1:47 pm EDT

## Customer Portal

The customer portal has been changed to allow customers to upload documents directly to projects. It now shares a common format and functionality with the Vendor Portal.



For more details on Customer Portal, see our article [here](#).

## Customization

### Project (Main) Fields

Users may now add an unlimited number of custom fields to the main area of projects. Create new date or text fields, to be followed shortly by drop down lists, and an option to define whether fields are mandatory. Users may apply them to any or all project templates.

Project Field List Disabled items [Show](#) [+ Add field](#)

Key1	Name	Type	Enable field on new project templates	Tools
OtherData1	Other Data1	TEXT	<input checked="" type="checkbox"/>	
OtherData2	Other Data2	TEXT	<input checked="" type="checkbox"/>	
OtherData3	Other Data3	TEXT	<input checked="" type="checkbox"/>	
OtherData4	Other Data4	TEXT	<input checked="" type="checkbox"/>	
OtherData5	Other Data5	DATE	<input checked="" type="checkbox"/>	
OtherData6	Other Data6	DATE	<input checked="" type="checkbox"/>	

No more pages [Show on Page: 20](#) [Save](#)

For detailed information on "Other Data" Project (Main) Fields, see our article [here](#).

# Equipment Upload

DocBoss now allow XLS files to be used to upload equipment data (vs CSV). This helps resolve issues where CSV file formats strip out non-ASCII text (foreign language document titles for example). It also can be useful when CSV files are difficult to manage based on an organizations Excel settings (generally related to localization settings).

For detailed information on editing an equipment list, see our article [here](#).

# Compilation

## Allow sub-packages for each section

There are some databook layouts which require sub-packages to be created for each databook section. This is now offered in DocBoss.

### Compilation Sub-Packages

Allow Sub-Packages per:

Create Sub-Packages by:

# Submittals

Add an option to set a "default" distribution list for each project. This selection is remembered for each subsequent submittal on the project.

# Templates

**Affiliate Variables:** We have updated several the instance general variables to pull data for the assigned affiliate

**XLS option for Sub-supplier cover page:** Users may now use XLS to create sub-supplier cover page templates.

**Manage XLS coverpages (customer):** Add an "settings" icon beside the XLS customer cover page drop down (only if template selected), allowing users to manage how XLS coverpages are managed. Whether they are created for Excel files only, and whether they are embedded into the Excel files as worksheets.

**Add general variables for multi-project SDI:** Users may now add project name, and other project variables to multi project SDI templates.

# Other Updates

**Add split parameter to output formatting:** Split can now be applied to all variable options in the TOC/Bookmark

Card and Outgoing Submittal File Name fields.

**Submittals Not-Yet-Downloaded Report:** Add Y/N columns for hidden and completed project, as well as column for submittal target.

**Support Accounts in user list:** Support accounts will no longer appear in user lists.

**Add doc code name to Included In pattern:** Allow user to display the doc code name when displaying included in codes.

# API

A new version of our API has been published, with online documentation and tests available for each query. More detail [available here](#).

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