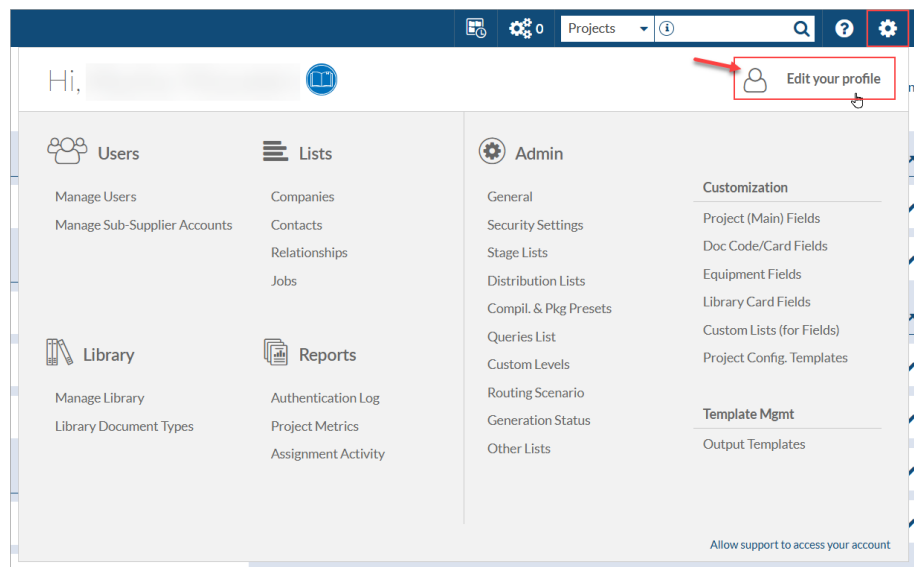


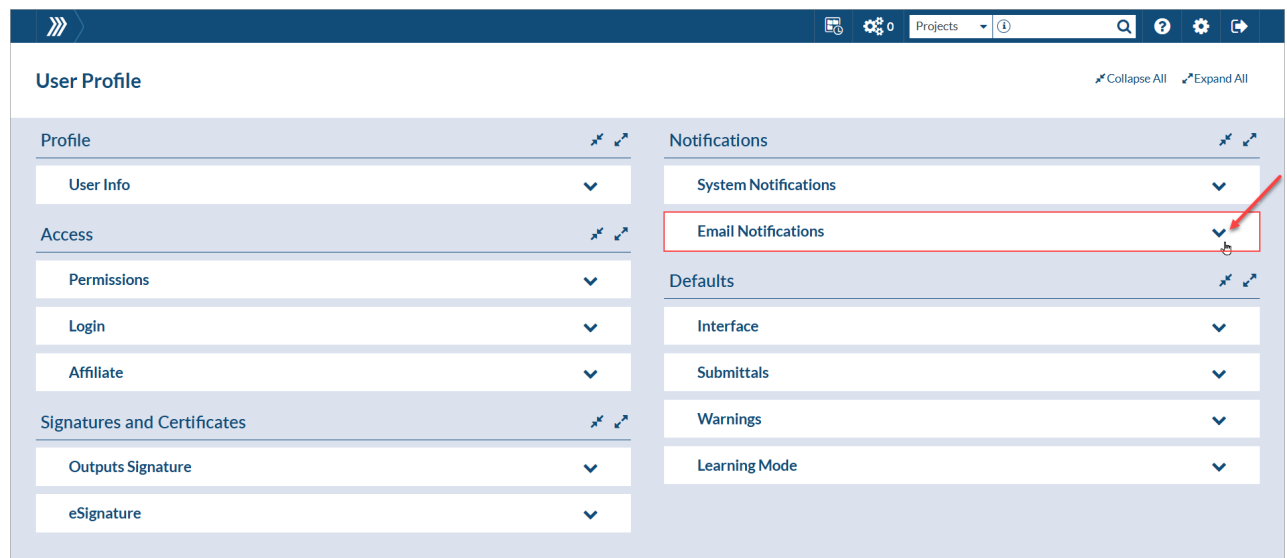
Automated email reports from user profile

10/03/2025 10:16 am MDT

To view and enable automated email reports, first navigate to your User Profile (System Menu > Edit your profile)



Scroll down to the Email Notifications area where several reports can be enabled and sent to you by email.



Alerts

Action Alerts

Alert
<input checked="" type="checkbox"/> Alert me about pending sign actions assigned to me
<input checked="" type="checkbox"/> Receive an email for each action assigned to me
<input checked="" type="checkbox"/> Receive an email for each internal approval action assigned to me

Action email notifications are sent immediately when an action has been assigned to you.

New action for Project: Pump Project (1234)

DN

DocBoss Notification Email <do-not-reply@docboss.com>
To [redacted]

☺

↩ Reply

↩ Reply All

➡ Forward

📧

⋮

Thu 25-Sep-2025 3:33 PM

Hello [redacted],
You have a new action required in DocBoss, due Oct 2, 2025.

Open card in Actions Dashboard

DOCUMENT

Project name: Pump Project (1234)
Doc title: Misc Drawings/Descriptive Drawings
Doc code: B03-Misc Drawings/Descriptive Drawings
Card name: B03_Pump 4

DOWNLOAD LINKS

Active file: [redacted]

To stop these emails, login to DocBoss, navigate to the "Email Notifications" section of your user profile, uncheck "Receive an email for each action assigned to me" and save.

This is a notification email only. Please do not reply to this email.

Portal Submittal Alerts

Alert

☒ Receive an email for new customer portal submittals

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

☒ Receive an email for new sub-supplier portal submittals

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

Portal submittal email notifications are sent immediately for the project(s) you've selected.

Submittal T-0049 received from Chem C for Pump Project (1234)

DN

DocBoss Notification Email <do-not-reply@docboss.com>
To [redacted]

☺

↩ Reply

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Fri 03-Oct-2025 8:14 AM

DOCBOSS

Hello [redacted],
A submittal has been received from Chemical Company for Project: Pump Project (1234)

Go to Submittal

Submittal info

Project: Pump Project (1234)
Customer: Chemical Company
Submittal number: T-0049
Submittal date: 2025/10/03
Number of files: 4

To stop these emails, login to DocBoss, navigate to the "Email Notifications" section of your user profile, uncheck "Receive email for new customer portal submittals"

This is a notification email only. Please do not reply to this email.

List

Outstanding Action List

List

☒ Receive a list of my open actions

☐ Send Now

Send list...

☒ Every working day

☐ Every Monday

☐ Hide empty cards

Daily or weekly list of of all outstanding actions assigned to you.

Your outstanding actions list for Omega instance

DN

DocBoss Notification Email <do-not-reply@docboss.com>

To

☺

↩ Reply

↩ Reply All

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Fri 03-Oct-2025 8:22 AM

This is a notification email only. Please do not reply to this email.

Outstanding Actions

Project name	Document name	Role	Comment	Doc Code	Level	Reference	Title	Doc No. (Customer)	Doc No. (Omega)	Doc No. (Sub-Supplier)	Doc No. (End User)	Action Due Date	Due to Customer
Valve Project (0001234)	B03_123ABC456DE	Doc Controller		B03 - Cross Section Drawings	Item/Model (TE)	123ABC456DE	Cross Section Drawings		0001234-B03-001-01			2025-09-29	
Valve Project (0001234)	B03_234ABC567DE	Doc Controller		B03 - Cross Section Drawings	Item/Model (TE)	234ABC567DE	Cross Section Drawings		0001234-B03-002-01			2025-09-29	
Valve Project (0001234)	B03_345ABC678DE	Doc Controller		B03 - Cross Section Drawings	Item/Model (TE)	345ABC678DE	Cross Section Drawings		0001234-B03-003-01			2025-09-29	
Valve Project (0001234)	B03_456ABC789DE	Doc Controller		B03 - Cross Section Drawings	Item/Model (TE)	456ABC789DE	Cross Section Drawings		0001234-B03-004-01			2025-09-29	

Report

Changes to Status/Stage Report

Report

☒ Send me a report showing all changes to status/stage

☐ Send Now

Send report...

☒ Every working day

☐ Every Monday

Report the following projects:

☒ All projects

☐ Select projects

☐ Send the email, even if there are no results

Daily or weekly report of all changes in status/stage for the project(s) you've selected. Typically for project managers and/or document controllers. Report sent as a downloadable .html file.

Actions Update Report (2025-09-26 - 2025-10-03)

DN

DocBoss Notification Email <do-not-reply@docboss.com>

To

☺

↩ Reply

↩ Reply All

➡ Forward

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Fri 03-Oct-2025 8:38 AM

📎 report.html

2 KB

Actions Update report for period 2025-09-26 - 2025-10-03 is attached.

This is a notification email only. Please do not reply to this email.

To stop these emails, login to DocBoss, navigate to your user profile, and uncheck "Send me a report showing all changes to status/stage" option.

Instance id =

Overdue Cards Report

Report

☒ Send me a report showing all overdue cards

☒ Send Now

Send report...

☒ Every working day

☐ Every Monday

Report the following projects:

☒ All projects

☐ My projects

☐ Select projects

☐ Send the email, even if there are no results

Daily or weekly report of all overdue cards for the project(s) you've selected. Report sent as a downloadable .xlsx file. Report can be customized using a template - see this article for details: [Edit the Default Overdue Cards Report](#).

Overdue Cards Report

DN DocBoss Notification Email <do-not-reply@docboss.com>
To [redacted]

report.xlsx 105 KB

Reply Reply All Forward

Fri 03-Oct-2025 8:43 AM

Overdue cards report is attached.
This is a notification email only. Please do not reply to this email.
To stop these emails, login to DocBoss, navigate to your user profile, and uncheck "Send me a report showing all overdue cards" option.
Instance Id = [redacted]

Not Downloaded Submittals Report

Report

☒ Send me a report showing all submittals which have not been downloaded by the customer (daily)

☒ Send Now

Report the following projects:

☒ All projects

☐ My projects

☐ Select projects

☐ Send the email, even if there are no results

Daily report of all submittals which have not yet been downloaded by the target for the project(s) you've selected. Report sent as a downloadable .csv file. For more information about not downloaded links, see this article: [List of Completed Submittals](#).

Not-downloaded submittals report

DN DocBoss Notification Email <do-not-reply@docboss.com>
To [redacted]

report.csv 4 KB

Reply Reply All Forward

Fri 03-Oct-2025 8:57 AM

Report with list of not-downloaded submittals is attached.
This is a notification email only. Please do not reply to this email.
To stop these emails, login to DocBoss, navigate to your user profile, and uncheck "Send me a report showing all submittals which have not been downloaded by the customer (daily)" option.
Instance Id = [redacted]

Assigned Incoming Submittals Report

Report

☒ Send me a report for each incoming customer submittal once all docs are assigned

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

Filter cards by

Select or type Filter Set name

☒ Send me a report for each incoming sub-supplier submittal once all docs are assigned

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

Filter cards by

Select or type Filter Set name

☒ Send me a report for each incoming Internal/Third-Party submittal once all docs are assigned

Report the following projects

☒ All projects

☐ My projects

☐ Select projects

Filter cards by

Select or type Filter Set name

Report (per submittal) listing all files that have been assigned to cards for the project(s) you've selected. Report is sent immediately after all files have been assigned. Output can be filtered by a pre-established multi-project card report [filter set](#).

New Submittal from Customer on Pump Project (1234): T-0049

DN

DocBoss Notification Email <do-not-reply@docboss.com>

To

☺

↩ Reply

↩ Reply All

➡ Forward

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If there are problems with how this message is displayed, click here to view it in a web browser.

DOCBOSS

A new incoming submittal has been added to DocBoss.
Project: Pump Project (1234)
Submittal no: T-0049
Submittal link:
Please find below a list of included files, along with their current stage and status.

File name	Doc No. (Omega)	Doc No. (Customer)	Doc No. (End User)	Stage	Status (Customer)
Document 1.pdf	H02-050-01	H02-001-01		IFA	1

To stop receiving this email, go to your user profile in DocBoss and disable the option "Send me a report for each incoming customer submittal once all docs are assigned"

This is a notification email only. Please do not reply to this email.