Automated email reports from user profile
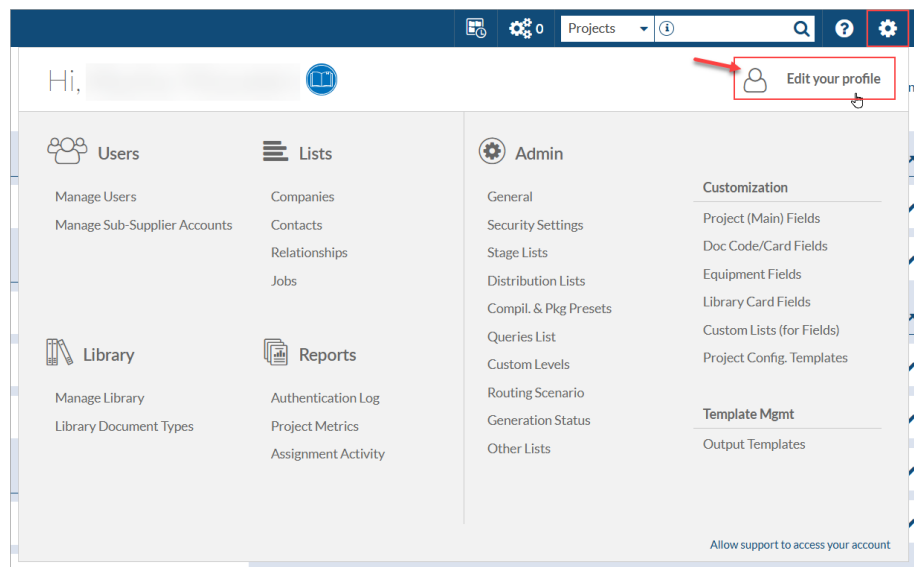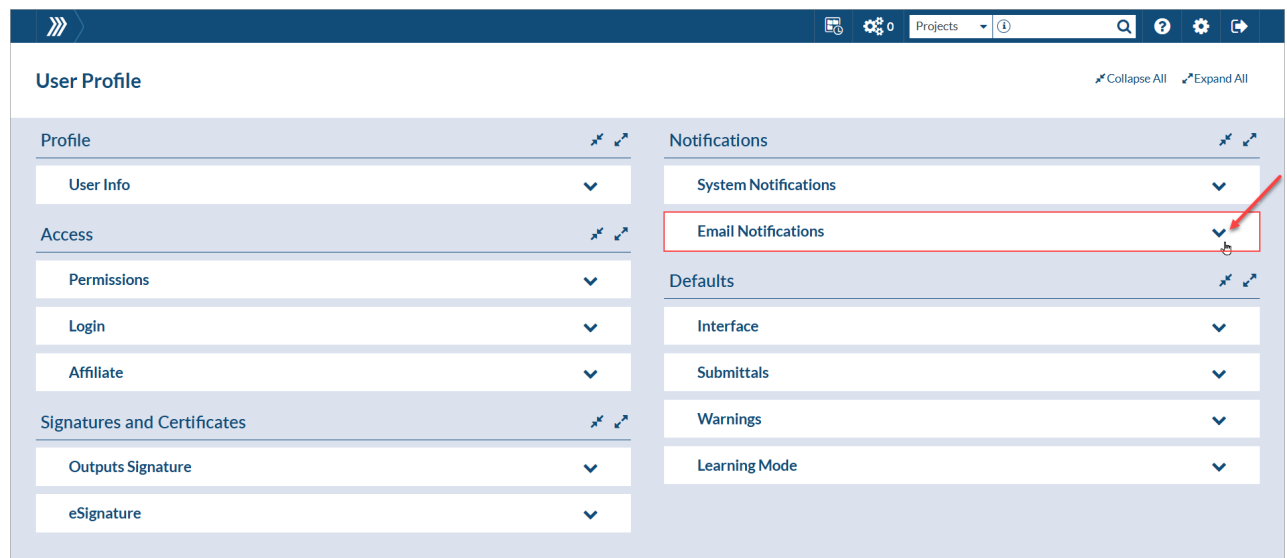
10/03/2025 10:16 am MDT

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

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

Portal Submittal Alerts

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

List

Outstanding Action List

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

Report

Changes to Status/Stage Report

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.

Overdue Cards Report

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.

Not Downloaded Submittals Report

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.

Assigned Incoming Submittals Report

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

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

Fri 03-Oct-2025 8:56 AM

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.