Release - December 2020

07/17/2024 1:48 pm EDT

Automated Expediting

The core function for this release is our expediting module!

DocBoss now allows users to expedite overdue cards from any project to any of the following groups (targets):

1. Customers

2. Suppliers

3. 3rd Parties

4. Outstanding actions

Once you enable the project for expediting and define the distribution lists for each company, you navigate to the system expediting window. From there, you can customize the layout of reports, and preview/send project specific expediting emails all in one sequence.

To get started, check out the below articles:

How to Enable Expediting for a Project

Expediting - Options and Settings

Run the Expedite Process and Send Emails

Other Items in this release

Various minor items have been includued into this release.
- Bulk disable cross reference code lists.
- Add warning if PDF files use bad fonts (issues flattening)
- Assign distribution lists to targets/companies.
- More functionality added to DocBoss API
- When generating compilations, filter the available list based on tag/custom list.