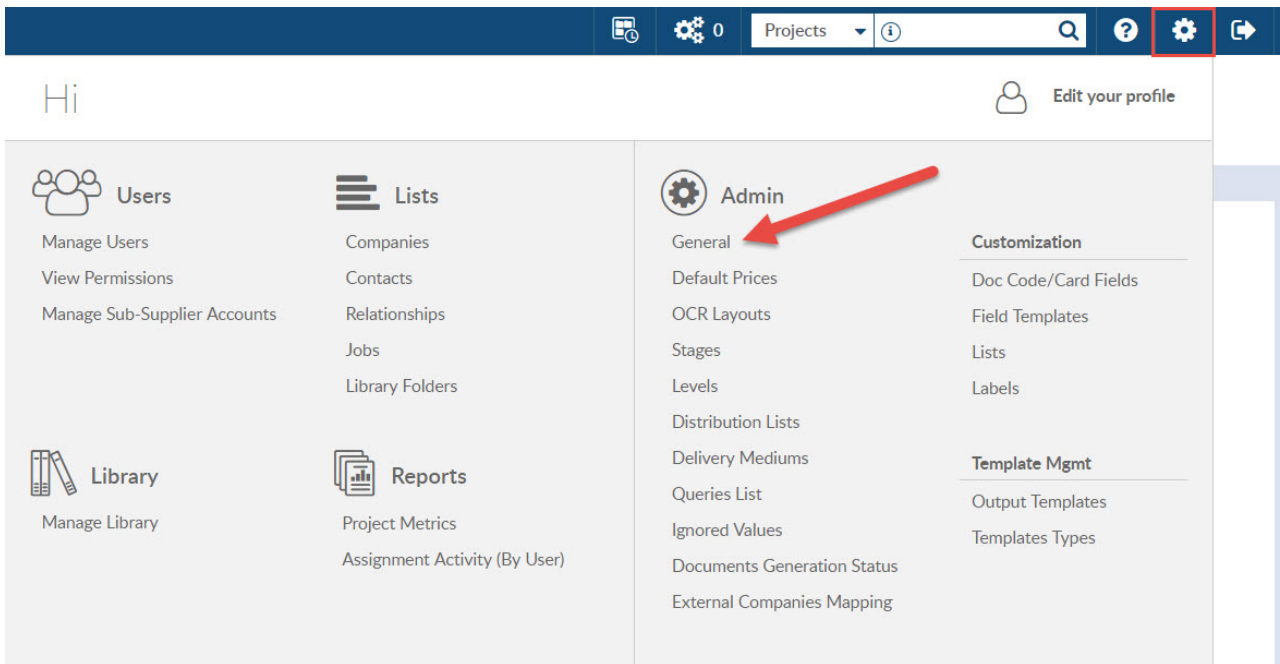# Instance Default Settings General

08/02/2024 11:10 am MDT

These settings allow you to customize DocBoss to suit your company needs. The default settings will automatically populate your projects accordingly however, changes can be made on individual projects as required.

### To get here -

1. Click Settings

2. Click General



## General



## User Licenses

## User Licenses

| | |
|---|---|
| Admin/Full | 2 / 100 |
| Reviewer | 0 / 100 |
| Viewer | 0 / 100 |

# Project Label Default Options

## Project Default Options

| | |
|---|---|
| Last Project Pattern 🖉 | <ProjectName> (<SalesOrderQuote>) |
| Default Stage List 🖉 | IFI |
| Default Project Fields Template 🖉 | Flare and Seal |
| Default Page Size for Output Documents 🖉 | ANSI A |
| Default Instance Turn Around (working days) 🖉 | 10 |
| Default Customer Turn Around (working days) 🖉 | 10 |
| Default Action Turn Around (working days) 🖉 | 5 |
| Default Stage Delivery Days (working days) 🖉 | 10 |
| Default Header Format 🖉 | <ProjectName> |
| Default Footer Format 🖉 | Document: <DocNoWolfePA> Page: <PageNumber> of <TotalPages> |
| Default Submittal Count Format 🖉 | ### |
| Primary Rev# Default Value 🖉 | 000 |
| Default Primary Doc Rev Format 🖉 | ### |
| Default Secondary Doc Rev Format 🖉 | ### |
| Primary Revision Number Warning 🖉 | Warn if not changed |
| Primary Doc Rev Name 🖉 | Wolfe PA Rev # |
| Secondary Doc Rev Name 🖉 | Customer Rev # |
| Handling Duplicates from Card to Units Changes 🖉 | Increase sheet |
| Status for Stage Auto Completion 🖉 | System Final Status(Z) |
| Allow Single Tag for Multi Qty CSV Upload 🖉 | No |
| Default Format of CSV Units Upload 🖉 | Single Quantity |
| Enable Mapping to Internal Codes 🖉 | Yes |
| Force Mapping on Codes List 🖉 | No |
| Copy Units, Default Levels and Stage Lists 🖉 | No |
| Default Delimiter for Bulk Assign 🖉 | "_" |
| Enable Internal Approval Statuses 🖉 | Yes |

### Outgoing File Name Format 🖉

| | |
|---|---|
| Type of Format | Single Pattern |
| Pattern | <DocNoWolfePA>_r<WolfePARev>.pdf |
| Customer Pattern | <DocNoCustomer>OR<DocNoWolfePA>_Rev<WolfePARev>_Sub<SubmittalCountCustomer> |
| Sub-Supplier Pattern | <DocNoSubSupplier>OR<DocNoWolfePA>_Rev<WolfePARev>_Sub<SubmittalCountCustomer> |
| Internal/3rd Party Pattern | <DocNoSubSupplier>_Rev<WolfePARev>_Sub<SubmittalCountCustomer> |
| Ad-Hoc Pattern | <DocNoSubSupplier>_Rev<WolfePARev>_Sub<SubmittalCountCustomer> |
| Bulk Doc Pattern | <DocNoSubSupplier>_Rev<WolfePARev>_Sub<SubmittalCountCustomer> |
| Suffix added to all comment files | _Comment |
| Suffix added to all native files | _Native |

# Doc Code Default Options

## Doc Code Default Options

| | |
|---|---|
| Default Doc Level ✏ | Order |
| Default Doc Type ✏ | Generated (Sub-Supplier) |
| Delivery Output ✏ | Yes |
| Default Delivery Days ✏ | 10 |
| Default Delivery Reference ✏ | AO |
| Default Assembly Line Field ✏ | Line |
| Default Assembly Model Field ✏ | Line |
| Stage for NULL Status Routings ✏ | Apply NULL routing to all stages |
| Default Sub-Supplier # Override ✏ | No |

# Project Label Landing Page

## Project Landing Page

| Role | Landing Page |
|---|---|
| admin ✏ | Code List (Requirements) |
| full ✏ | Code List (Requirements) |
| reviewer ✏ | Code List (Requirements) |
| view ✏ | Code List (Requirements) |

# Dashboard Card Settings

## Dashboard Card Settings

| | |
|---|---|
| Card Line 1 Pattern ✏ | <CustomerFullName> |
| Card Line 2 Pattern ✏ | <ProjectName> |
| Card Line 3 Pattern ✏ | <PONumber> / <PORevNumber> |
| Card Line 4 Pattern ✏ | <ProjectDueDate> |
| Card Line 5 Pattern ✏ | <Completeness> |

# Transmittals Default Options

## Transmittals Default Options

| | |
|---|---|
| Outbound Generic Email Address ✏ | |
| Outbound Generic Email Name ✏ | |
| Email FROM Address Settings ✏ | Use DO-NOT-REPLY@docboss.com |
| Contact Info ✏ | Use User Email Address |
| Send Transmittal Email Notification ✏ | Yes |
| Include Transmittal Summary into Email ✏ | PDF |
| Include Hyperlink into Email ✏ | Yes |
| Link Expiration Period (days) ✏ | 7 |
| Require Name for Doc Access ✏ | Yes |
| Download Grace Period (days) ✏ | 5 |
| Show Delivery Medium ✏ | No |
| Default Delivery Medium ✏ | Email |
| Enforce Sub-Supplier Selection ✏ | Yes |
| Add Comments Page to Document on Submittal ✏ | Yes |

### Transmittal Numbering Format ✏

| | |
|---|---|
| Type of Format | Pattern per Target |
| Transmittal Pattern | TRANS-<Sequence###> |
| Customer Transmittal Pattern | T-<Sequence###> |
| Sub-Supplier Transmittal Pattern | T(S)-<Sequence###> |
| Internal Transmittal Pattern | T(I)-<Sequence###> |
| Ad-Hoc Transmittal Pattern | T(A)-<Sequence###> |

# Default Names for Reviewer Roles

## Default Names for Reviewer Roles

| | Name | Suffix |
|---|---|---|
| Role1 ✏ | Admin | a |
| Role2 ✏ | Tech | t |
| Role3 ✏ | Drafter | d |
| Role4 ✏ | Construction | c |

# Default Library Query Settings

## Default Library Query Settings

| | |
|---|---|
| Library Query Match ✏ | Single |
| Library Query Searching Fields ✏ | Any field |

# Document Auto-Numbering Format

## Document Auto-Numbering Format ❓ ✏️

### Customer
☐ Make Customer Doc # Required

| | |
|---|---|
| Convention | |
| Format: Sequence ❓ | |
| Format: Sheet ❓ | |
| ☐ Generate Sequence per field(s) | |
| Start sequence from | 1 |
| Sequence ordering | Sort by Doc Code + Doc Code Name then reference |

### Wolfe PA

| | |
|---|---|
| Convention | \<SalesOrder\>-\<DocCode\>-\<Sequence\>-\<Sheet\> |
| Format: Sequence ❓ | #### |
| Format: Sheet ❓ | ### |
| ☑ Generate Sequence per field(s) | Doc Code |
| Start sequence from | 1 |
| Sequence ordering | Sort by Doc Code + Doc Code Name then reference |

### Common

☐ Use Line Number Order for Generating Sequences ❓