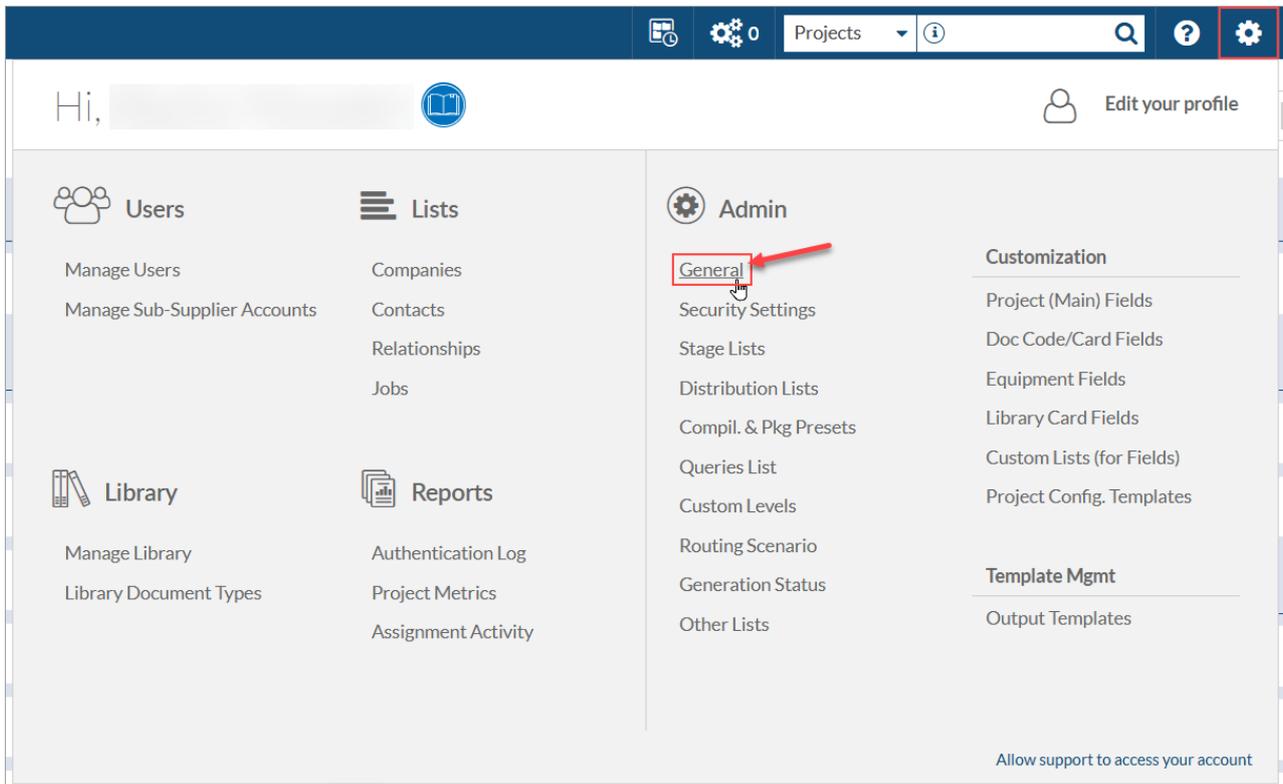# Instance Default Settings General

05/05/2026 1:43 pm 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 review/edit the default settings, navigate to **System Menu > Admin > General.**

System Information

Identifies the ID number of your system.

Global Settings

Feature Management

Option to enable internal codes, internal approval statuses, and contact address fields.

Companies

Set defaults for doc code level, doc type, delivery days, and delivery reference.

These settings will apply to Project Configuration defaults OR become the default settings for new doc codes added to company doc code lists.
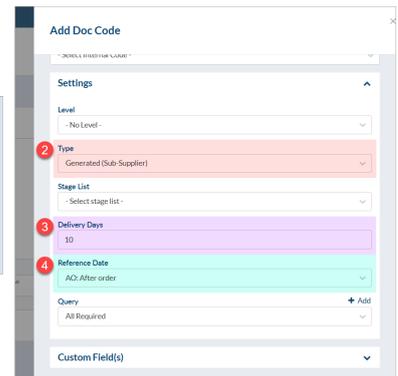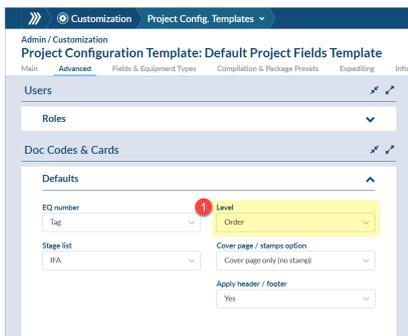
Role Names & Abbreviations

Option to update the name and suffix for each user role. Use these options to have DocBoss adhere to your company's naming standards.

Role Names & Abbreviations

Role 1 name *	**Role 1 suffix** *
Doc Controller	d
Role 2 name *	**Role 2 suffix** *
Preparer	p
Role 3 name *	**Role 3 suffix** *
Checker	c
Role 4 name *	**Role 4 suffix** *
Approver	a

Customization

Set the project display pattern and default date format.

Customization

Project display pattern *

<ProjectName> (<SalesOrderQuote>)   ✖   + Add variable

Date format

yyyy-mm-dd

Screen Specific Settings

Option to set the file naming pattern for file downloads from the multi-project card report. Also provides opportunity to set the specific information communicated on Project Dashboard tiles, allowing you to highlight the most useful/important information to your company.

Screen Specific Settings

Multi-Project Card Report

Multi-project card report file naming pattern (bulk download) *

<DocNoSubSupplier>_Rev<RevOmega>_Sub<SubmittalCountCustomer>   ✖   + Add variable

Project Dashboard

Tile line 1 pattern *

<CustomerFullName>   ✖   + Add variable

Tile line 2 pattern *

<ProjectName>   ✖   + Add variable

Tile line 3 pattern *

<PONumber> / <PORevNumber>   ✖   + Add variable

Tile line 4 pattern *

<ProjectDueDate>   ✖   + Add variable

Tile line 5 pattern *

<Completeness>   ✖   + Add variable

ACME Engineering
Instruments

1234 /
Eq Ship Date: 2025-03-01
18% Complete (23/131)

Customer/Sub-Supplier Portal Logo

Option to update the logo that is displayed on the customer/sub-supplier portal (replacing the DocBoss logo with your company logo).

Labels

Option to set labels for display across the system. Value in italics indicates that the default DocBoss is currently used, but can be replaced to reflect your company's naming standards.

Licensing

License Deployment

Provides a snapshot of the number of different DocBoss licenses being used compared to how many licenses are available.

User Defaults

Regional Settings

Identifies the time zone set on your system, and the delimiter that appears between values on CSV exports.

Regional Settings ⌃

Time zone
(GMT-05:00) Eastern Time (US & Canada)

CSV delimiter
,

> ℹ The time zone set on Admin > General will be the time zone used when generating submittals (submittal date is based on instance time zone), even if custom affiliate admin settings are being used. However, the submittal **creation** date will always be reflected in the user's selected time zone (set on their user profile).

Project Landing Page

Identifies the default landing page for each user role. Use these options to change the landing page for different roles and help facilitate the work that each role performs (e.g., Reviewer = Outstanding Actions).

Project Landing Page ⌃

Admin
Project hub

Reviewer
Outstanding actions

Full
Incoming documents

View
Project hub

Project Settings

General

Set the default project template used for new projects, as well as enable options that apply when projects are copied.

General ⌃

Project template
Default Project Fields Template

Copy project
☐ Copy units
☐ Copy compilations/SDI

Equipment

Set the default upload type for when equipment units are added via CSV, and identify whether or not a single tag is allowed for multiple units when uploading a multi-quantity CSV.

Equipment

Format of CSV units upload

[Single quantity ▾]

Allow single tag for multi qty CSV upload

[Yes ▾]

Document Codes & Cards

Set the default fields for pre-established levels, and manage the handling of cards.

Document Codes & Cards

Assembly line level field

[Line no. (Omega) ▾]

Assembly model level field

[Line no. (Omega) ▾]

Unit level format

[Line ▾]

Stage for NULL status routings

[Apply NULL routing to all stages ▾]

Auto-numbering mgmt for duplicate cards (split, card to unit)

[Increase sheet ▾]

Submittals

Option to update the sender information for outgoing submittals, the attachment/link settings, and default bulk match delimiter for incoming submittals.

Submittals

Outbound generic email address

[ ]

Outbound generic email name

[ ]

Link expiration period (working days) *

[7]

Download grace period (working days) *

[5]

Incoming bulk match delimiter *

["_"]

Stages

Option to update the default delivery days for stages.

Stages

Stage delivery days (working days) *

[10]