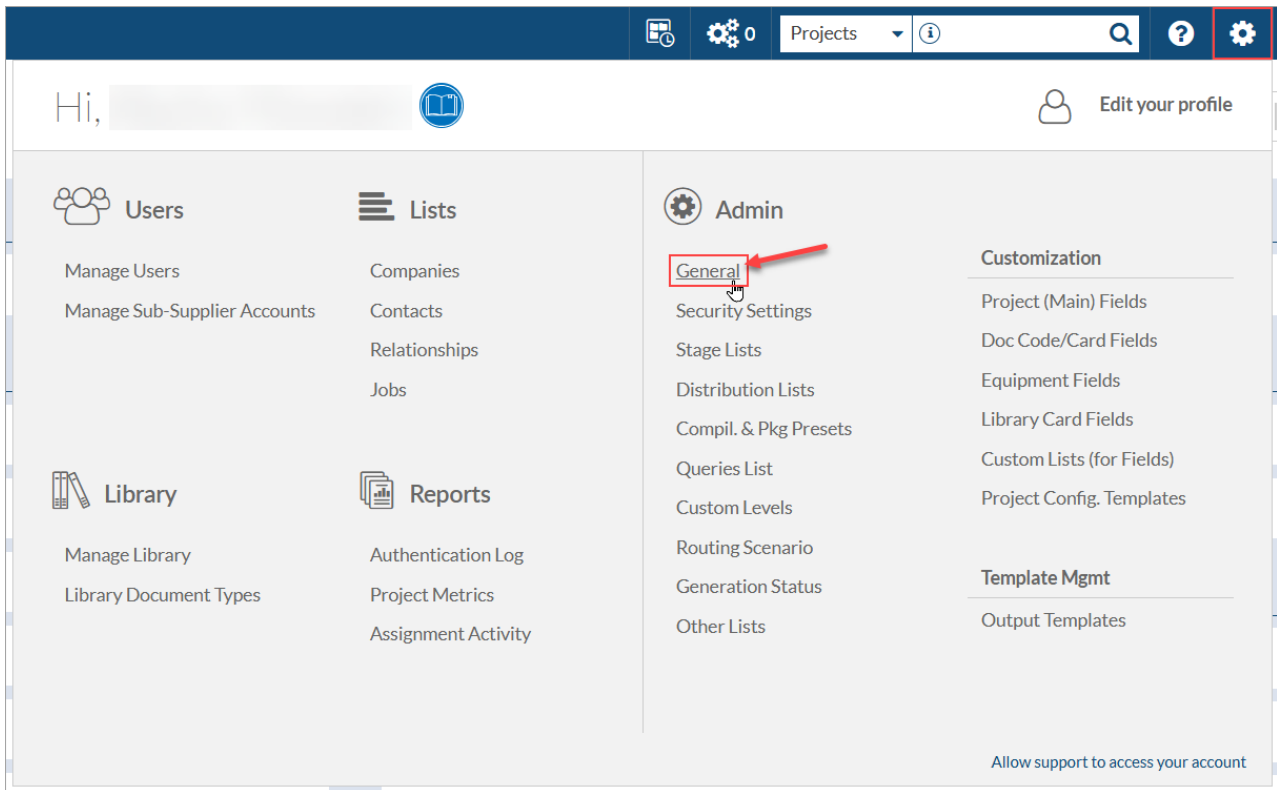


Instance Default Settings General

04/23/2026 3:05 pm MDT

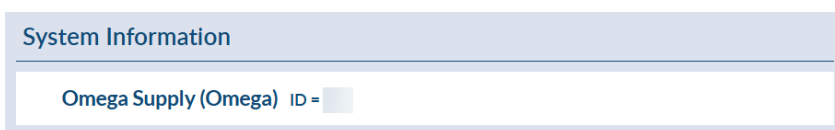
These settings allow you to customize DocBoss to suit your company needs. The default settings will automatically populate your projects accordingly however, changes can be made on individual projects as required.

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.

Feature Management ^

Enable mapping to internal codes Enable internal approval statuses

Enable contact address fields

Companies

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

Companies ^

Doc level

Order

Delivery days (working days) *

10

Doc type

Generated (Sub-Supplier)

Delivery reference

AO: After order

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 * <input type="text" value="Doc Controller"/>	Role 1 suffix * <input type="text" value="d"/>
Role 2 name * <input type="text" value="Preparer"/>	Role 2 suffix * <input type="text" value="p"/>
Role 3 name * <input type="text" value="Checker"/>	Role 3 suffix * <input type="text" value="c"/>
Role 4 name * <input type="text" value="Approver"/>	Role 4 suffix * <input type="text" value="a"/>

Customization

Set the project display pattern and default date format.

Customization

Project display pattern *
 ✕ + Add variable

Date format

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) *
 ✕ + Add variable

Project Dashboard

Tile line 1 pattern *
 ✕ + Add variable

Tile line 2 pattern *
 ✕ + Add variable

Tile line 3 pattern *
 ✕ + Add variable

Tile line 4 pattern *
 ✕ + Add variable

Tile line 5 pattern *
 ✕ + 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).

Customer/Sub-Supplier Portal Logo ^

This logo will be displayed on the customer/sub-supplier portal. For best results, upload a white logo with a transparent background (200x30 pixels).

Drag and drop new image

Or choose files from disk

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.

Labels ^

Project label <input type="text" value="Project"/>	Sales order label <input type="text" value="Sales Order"/>
Job label <input type="text" value="Job"/>	Affiliate label <input type="text" value="Affiliate"/>
Internal label <input type="text" value="Internal/Third-Party"/>	Confidential label <input type="text" value="Confidential"/>

Licensing

License Deployment

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

License Deployment ^

Total	12 / 55	Reviewer	3 / 11
Admin/Full	7 / 30	View	2 / 14

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

CSV delimiter

 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 ^

<p>Admin</p> <input type="text" value="Project hub"/>	<p>Reviewer</p> <input type="text" value="Outstanding actions"/>
<p>Full</p> <input type="text" value="Incoming documents"/>	<p>View</p> <input type="text" value="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

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