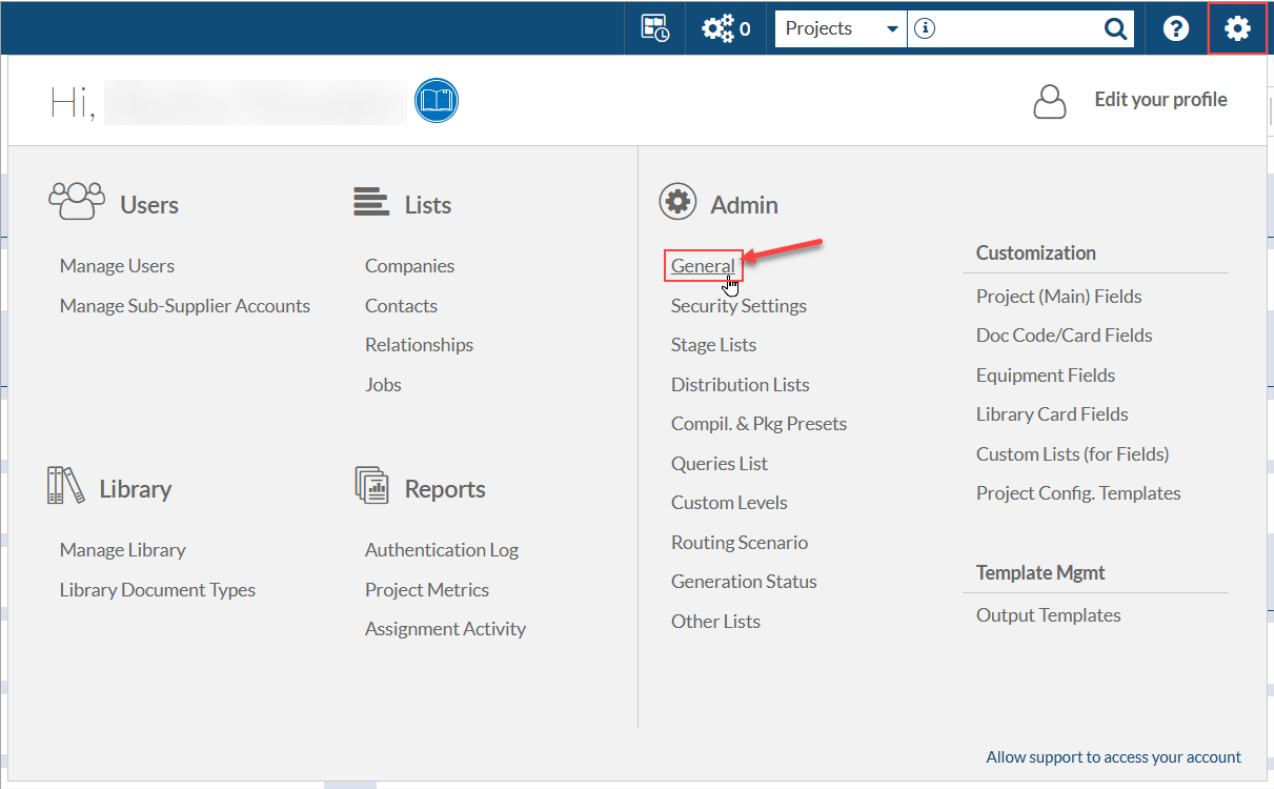# Instance Default Settings General

10/02/2025 1:05 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

Doc type

Generated (Sub-Supplier)

Delivery days (working days) *

10

Delivery reference

AO: After order

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 *

Doc Controller

Role 2 name *

Preparer

Role 3 name *

Checker

Role 4 name *

Approver

Role 1 suffix *

d

Role 2 suffix *

p

Role 3 suffix *

c

Role 4 suffix *

a

Customization

Set the project display pattern and default 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.

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.

Labels

Project label

Project

Sales order label

Sales Order

Job label

Job

Affiliate label

Affiliate

Internal label

Internal/Third-Party

Confidential label

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

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

CSV delimiter

,

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	Reviewer
Project hub	Outstanding actions

Full	View
Incoming documents	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	Allow single tag for multi qty CSV upload
Single quantity	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

Handling duplicates from card to unit changes

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