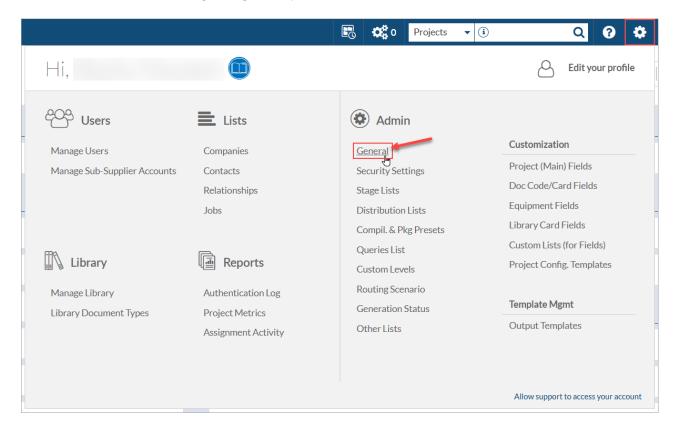
Instance Default Settings General

10/28/2025 4:03 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

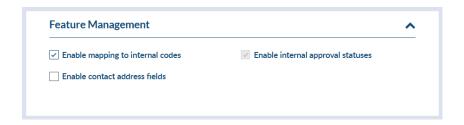
Identifies the ID number of your system.



Global Settings

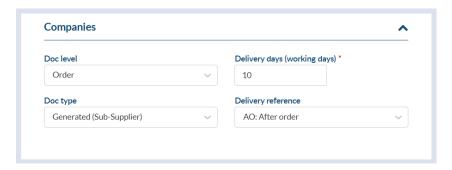
Feature Management

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.



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.



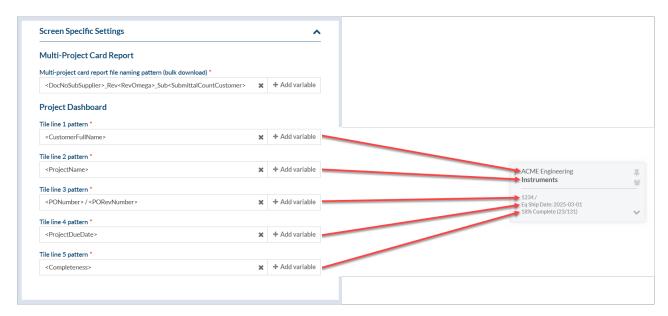
Customization

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.



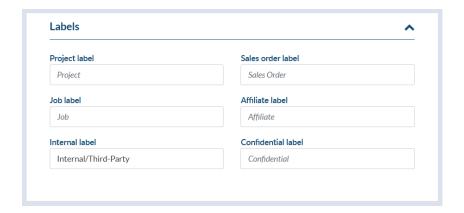
Customer/Sub-Supplier Portal Logo

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.



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

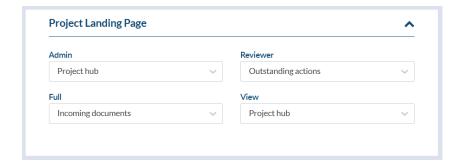
Identifies the time zone set on your system, and the delimiter that appears between values on CSV exports.



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 Settings

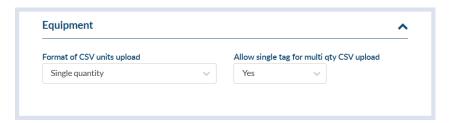
General

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



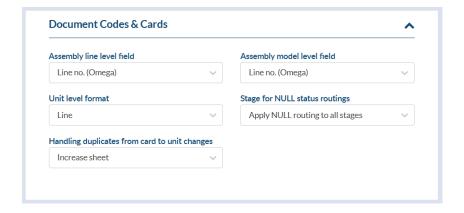
Equipment

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.



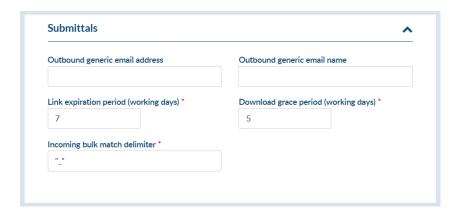
Document Codes & Cards

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



Submittals

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



Stages

Option to update the default delivery days for stages.

