

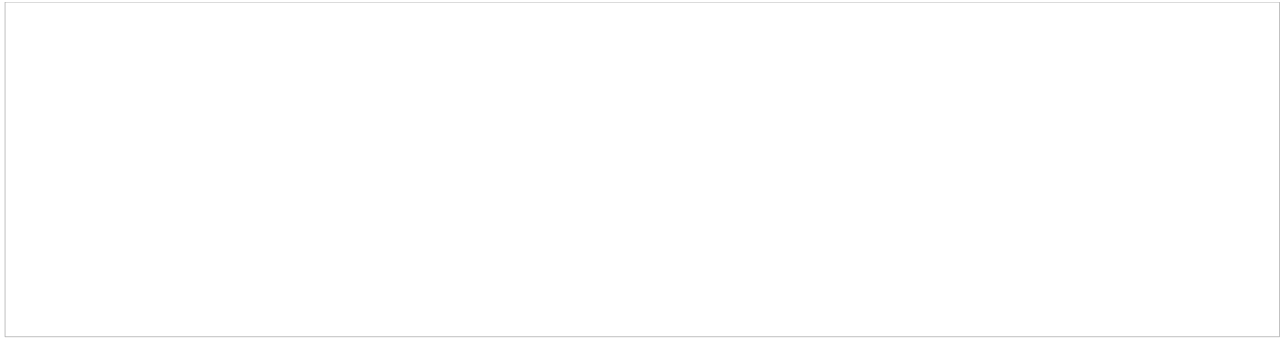
# Release – Jan 2017

07/17/2024 1:54 pm EDT

## Clear warnings for “Not Downloaded by Customer”

On the projects dashboard, DocBoss warns you if customers have not clicked the download link in the transmittal notification. In some cases, these warnings are no longer useful. You can manually clear these warnings.





## **Copy Grid settings from another user**

When adding new users to the system, it may be useful to copy the grid settings from another user, vs having all grid set to the DocBoss standard, You may now choose a user from whom to copy grid settings for new users.

## **Dashboard:**

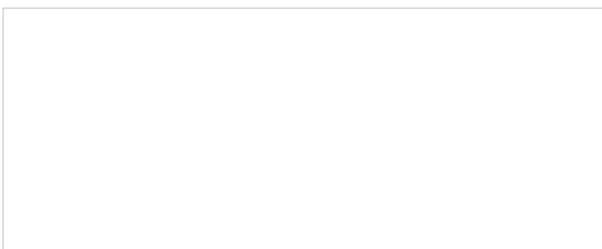
### **Lenses**

We have added Internal Codes as an option to dashboard lenses. Now, if you have set up internal document codes, you can use them to skin the project cards. Looking for data on calculations, but each customer uses a different code? Now you can apply a lens for you internal calculations code, and the data will dance!



## **Edit data on collapsed card view**

Administrators may now edit the data being displayed on all 5 rows of the collapsed project card. The settings are available in the admin / general area.



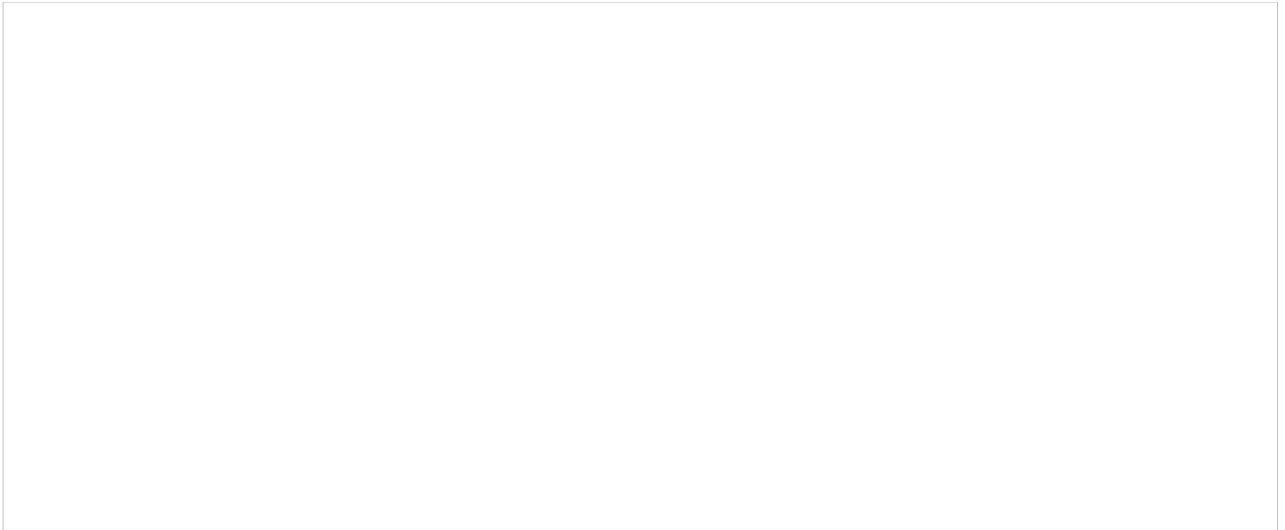
## **Configure groups (screen update)**

We have updated the screen to configure groups on the dashboard and added the ability to have a group for each segment you define (i.e. a group for each customer).



## **Internal Statuses (output text)**

DocBoss maintains an internal status for each register. Sometimes – those statuses should be output to an index report, but our explanation isn't sufficient. Now you can enter your own description for the internal statuses, and use a new index variable to include it in your report.



## **Edit Custom Fields on Obsolete Registers**

Once a register has been moved to the obsolete area, users can now access and edit the customer fields associated with it. This can be helpful if you are including the registers on index reports, and need to change specific pieces of data.

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