

Completing a Project

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To complete a project in DocBoss, navigate to **Project Menu > Set Up > Main**. In the bottom right, click the button to "Complete Project".

Valve Project (0005678) Main

Set Up Main

Project Settings

- Project Profile
- Doc Code and Status Lists
- Users and Key Contacts
- Turn Around Days Using defaults
- Document Auto-Numbering Format Using defaults
- Document Revision Settings Using defaults
- Prices and Estimates

Other Data

- Other Data
- Custom Fields

Templates

- Cover Pages and Stamps Using defaults
- Transmittal
- Submittal Defaults
 - Numbering Using defaults
 - File Naming Pattern Using defaults
 - Headers and Footers Using defaults
 - Markup Output Using defaults
 - Batching, Downloads and Medium Using defaults
 - Incoming
- Submittal Email Notifications
 - Sender Using defaults

Project (Main) Log

Save Project Copy Project Hide Project **Complete Project**

If all cards are in a complete status, the project will be completed.

If any cards are not in a complete status (i.e., NULL or not returned coded from the customer), a message will appear indicating the number of cards that are not completed. With this information, the card list can be reviewed and any outstanding cards can be completed. Alternatively, if you would like to move forward (and leave the cards as-is), click "Yes" to confirm project completion.

Confirmation

There are 35 documents which are not in complete status. Are you sure you want perform project completion?

No Yes

The option to re-open a completed project is available if required. To re-open a project, navigate to **Project Menu > Set Up > Main**. In the bottom right, click the button to "Re-Open Project".

Incoming

Submittal Email Notifications

Sender Using defaults

Save Project Copy Project Hide Project **Re-Open Project**

