Add Stamps

11/13/2024 12:04 pm MST

In some cases, customers require that stamps are placed directly onto the document, rather than, or in addition to a cover page. DocBoss allows users to upload stamp templates, and stamp documents. The same variables as used on cover pages can be used in stamp templates.

Let's Do It!

- 1. Upload stamp template
- 2. Select a stamp on your project
- 3. Define the stamp preference for each doc code
- 4. Apply a stamp

1. Upload stamp template

(*Note on the excel template do not center on page)

Navigate to Output Templates

| | | 0 Projects 🔻 🧿 | Q 😯 🌣 🕞 |
|------------------------------|-------------------------------|----------------------------|--------------------------------------|
| Hi, | | | Edit your profile |
| COS Users | Lists | Admin | 1 |
| - Manage Users | Companies | Customization | |
| View Permissions | Contacts | Security Settings | Project (Main) Fields |
| Manage Sub-Supplier Accounts | Relationships | Default Prices | Doc Code/Card Fields |
| | Jobs | Stages | Equipment Fields |
| | | Levels | Project Templates |
| Library | ē. | Distribution Lists | Package Layout |
| | Reports | Delivery Mediums | Lists |
| B Manage Library | age Library Project Metrics | | Labels |
| Library Folders | Assignment Activity (By User) | Ignored Values | |
| | | Document Generation Status | Template Mgmt |
| | | External Com 2 | Output Templates |
| | | | Templates Types |
| | | | Allow support to access your account |

- 1. Click "+" to add new template
- 2. Name the template
- 3. Select Stamp as Template Type

- 4. Add description
- 5. Select Template File Format (typically Excel)
- 6. Browse to your file
- 7. Click Upload
- 8. Define the default size of the stamp. The values will auto-populate but you can adjust accordingly. (Width cannot be greater than 8in.)
- 9. Select Date Format Use Instance Default or select options from drop down menu
- 10. Select to use this template as Defaults for new projects
- 11. Save

| / Template Mgmt put Templates | | | | | | | |
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| Output Templates | | | | | | | |
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| PDF/CSV/XLS Templat | es | | | | | (1) | |
| Typet∀ | Name | Description | Template Format | Output Format | Owner | Default for Project | Tools |
| Compilation Cover Page | | Rev Index Test | Excel | pdf, xisx | Kirstie Reld | ~ | QÎ |
| Compilation Cover Page | | EEK MD Come CD | Event | and store | Kirstie Reid | ~ | QÎ |
| Compilation Cover Page | | Create Template | | × | Kirstie Reid | ~ | Qâs |
| Compilation Cover Page | | Create Template | | | Kirstie Reid | ~ | QÎ |
| Compilation Cover Page | | | | | Kirstle Reld | ~ | Q 🖻 🖉 |
| Compliation Cover Page | | Max allowed file size is 20Mb | | | Kirstie Reid | ~ | QÎ |
| Compilation Cover Page | | Download Instructions for XLS(x) templates | | | Kirstie Reid | ~ | QÎ |
| Compilation Cover Page | | Template Name:* 2 New Stamp | | | System | ~ | Q.01 |
| Compilation Cover Page | | Template Type:* 3 Stamp | | ~ | Kirstie Reid | ~ | QÎ |
| Compilation DCTP | | Description:* 4 New Stamp | | | Kirstle Reld | ~ | QÎ |
| Compilation DCTP | | Template File Format* | C LaTeX 6 | | System | ~ | Q.Ø / |
| Compilation DCTP | | | | Upload | Kirstie Reid | ~ | QÎ |
| Compilation DCTP | | Stamp size* 8 Widtk* | (in) Height* | (in) | Kirstie Reid | ~ | QÎ |
| Compilation Index | | Default Date Format 9 Use instance defau | | v line | System | | Q.Ø # |
| Compilation SPTP | | Default for Project 10 | | | System | ~ | Q.Ø.Ø |
| Compilation STP | | | | | Kirstie Reid | ~ | Qî |
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| Compilation STP | | Compilation Section Title Page | LaTeX | pdf | System | ~ | 0.00 |

NOTE: On submission, DocBoss will notify the user if the data filled stamp will occupy a larger space than the default size. This can occur if a field has "auto height" to accommodate variable tag lists.

2. Select a stamp on your project

A new option is available in the output settings area of the Main project setup. To use a stamp on a project, you must select the stamp here.

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| t Up lain | | | | | | | | |
| Save Project & Copy Project | 6 Hide Project 🗸 Complete Project | | | | | | | |
| Profile | | | Output Settings | | | | | |
| Project Type Customer Customer Address | Order Quote ACME Calgary, AB | ▼ + ♪ | Stamp ACME Stamp | XLS: Default Stamp Template [XLS] (sy 🕶 | 1 | | | |
| Project Name Project Description Job Wolfe PA Sales Order | M Project Valves - Select Job - 149441 | •+ | Cover Pages ACME Cover Page Sub-Supplier Cover Page Transmittals | PDF: ACME Cover Page [XLS] (system) ▼ PDF: Default Sub-Supplier Cover Page ▼ | | d- • | | |
| Package Number PO Number PO Rev Number End User | • 147743 • 147743 • 1 - Select End User - | v]+ | ACME Transmittal Sub-Supplier Transmittal Internal Transmittal | PDF: Default Transmittal w/ Wolfe PA PDF: Default Sub-Supplier Transmittal Uses the Sub-Supplier transmittal tem | | d - 🗸 | | |

3. Define the stamp preference for each doc code

Click here to read our article about cover page/stamp preferences on each doc code.

4. How to apply a stamp

Click here to check out our article about applying stamps on your documents.