

Card State

09/16/2024 1:37 pm MDT

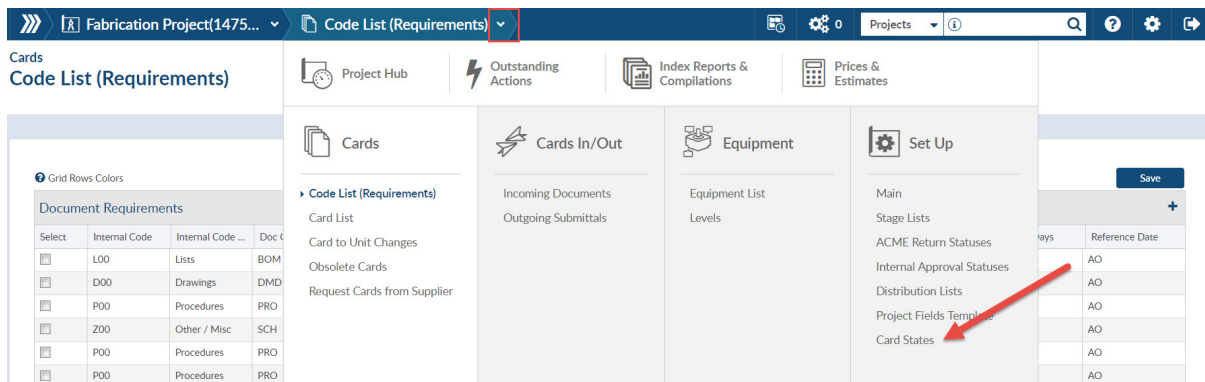
DocBoss maintains a **state** for every **locked** card. Cards become locked if ANY of the following actions have been performed:

- The card has been submitted to the customer (tracked separately also)
- A system generated INDEX has been submitted to the customer
- A user has manually locked the cards by clicking on the lock icon beside the project name

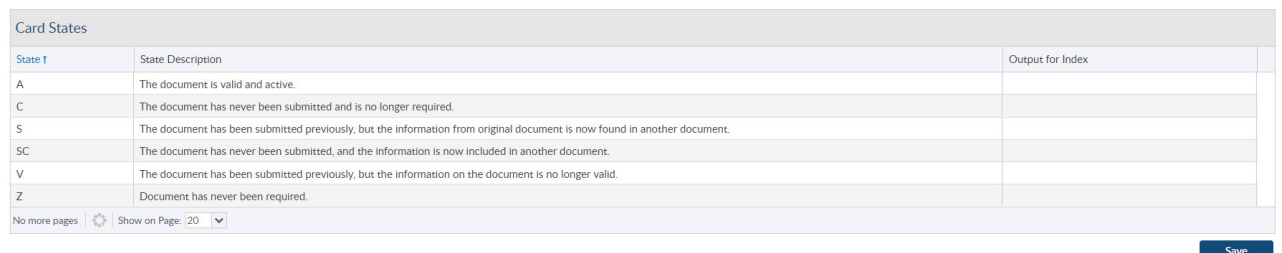
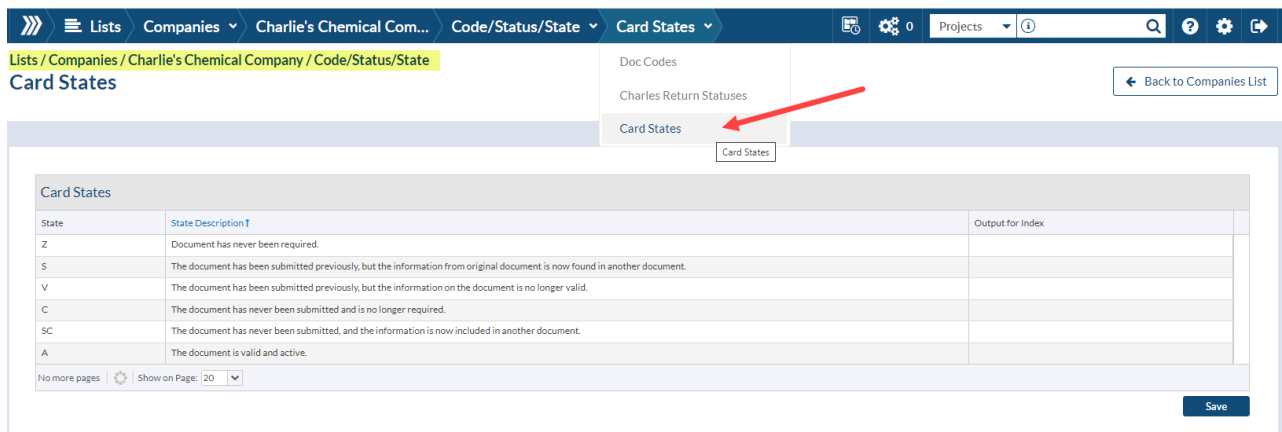
Below is a list of the default values. This list is configurable by going to the setup / card state grid on the project, you can also set state values on the Companies.

NOTE: The description column defines specific system actions/occurrences. They are not editable. The state value column is editable. Also – you MAY use the same state for multiple lines if you do not want to track the distinction.

Within the project:



Within the Companies profile:



Below is a description of the actions required to move a card into any of the states you see above.

Statuses related to VOID:

- Default C (for Cancelled)
 - The card was required.
 - Then card was locked (**but NOT submitted**).
 - Then card changed to not required.
- Default V (for Void)
 - Card was required
 - Card was locked (**AND submitted to customer**)
 - Then card changed to not required

Statuses related to SUPERSEDE or MERGE then VOID:

- Default SC (for Superseded and Cancelled):
 - Document is required
 - Card is locked (**but NOT submitted to customer**)
 - Card was merged into another card
- Default S (for Superseded):
 - Document is required
 - Card is locked (**AND was submitted to customer**)
 - Card was merged into another card

Other:

- Default A (for Active)
 - The card is **required** for the project and does not meet any of the other conditions.
 - Can be locked or unlocked
 - Default Z:
 - Card is **not required**
 - Card is **not locked**
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