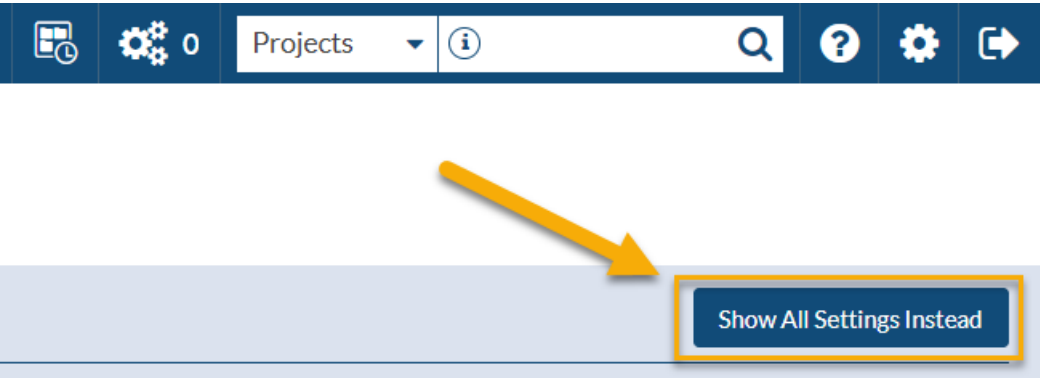# Project Main

09/24/2025 2:40 pm MDT

The "Main" tab of the Project Configuration page is where many of the project options are configured. This article explains the various options available on this page.

The first time a project is started, this screen defaults to the Quick Start form. Selecting **Show All Settings Instead** will display the full list of settings.

Any time a user returns to the "Main" tab of the Project Configuration page on an existing project, the full list of settings will appear.
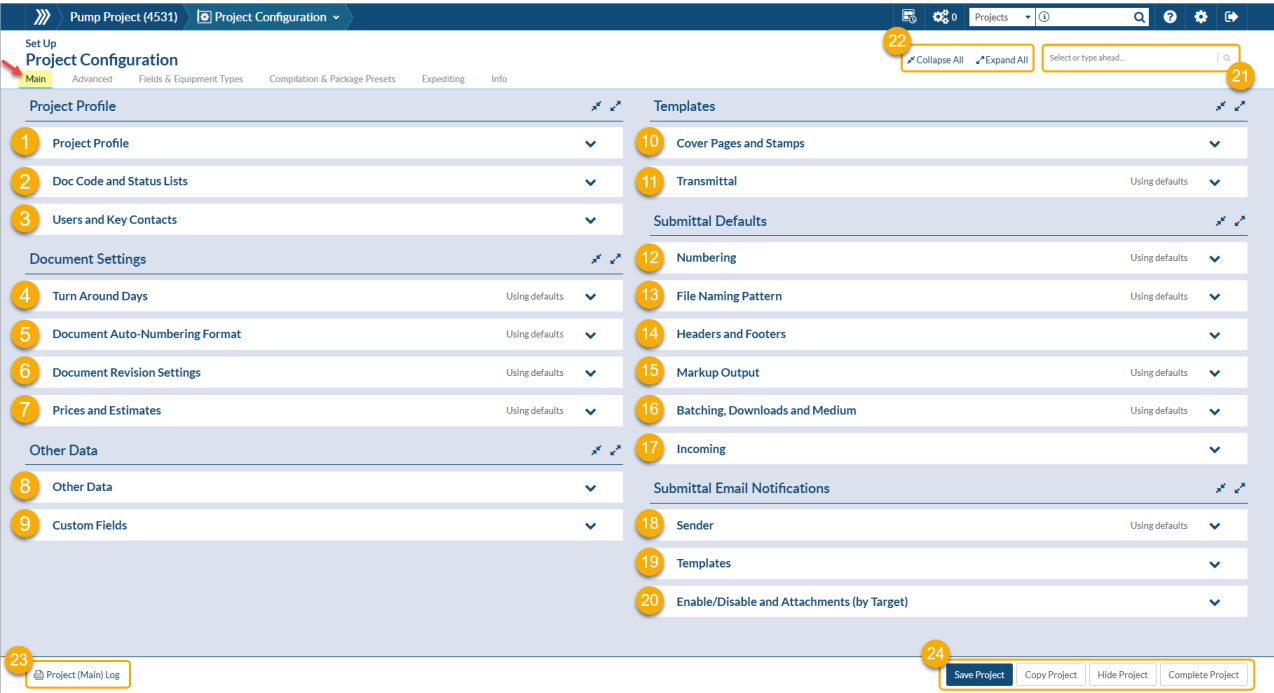
An explanation of each section in the image follows:

Project Profile

Project Profile

1) Project Profile: project IDs and information about the companies involved in the project (Supplier, Customer, and End User). For an explanation of each field, see Project Profile Definitions.

2) Doc Code and Status Lists: select the applicable doc code and return status lists for the project. Also choose the internal approval status list, if using IA.

3) Users and Key Contacts: select the default project users (for filtering projects and assigning actions) and the key project contacts at the Customer/End User.

Document Settings

4) Turn Around Days: set the number of days for document turn around after initial submission.

5) Document Auto-Numbering Format: set patterns for Customer and Supplier document numbering.

6) Document Revision Settings: set revision options and formats.

7) Prices and Estimates: select settings for Estimation template output.

Other Data

8) Other Data: paragraph-style notes field.

9) Custom Fields: fill out any custom Project (Main) fields enabled on the active project template.

Templates

Templates	
10 Cover Pages and Stamps	⌄
11 Transmittal	⌄

10) Cover Pages and Stamps: choose the cover page and stamps templates and formats.

11) Transmittal: choose the transmittal file template and format.

Submittal Defaults

Submittal Defaults		
12 Numbering	Using defaults	⌄
13 File Naming Pattern	Using defaults	⌄
14 Headers and Footers		⌄
15 Markup Output	Using defaults	⌄
16 Batching, Downloads and Medium	Using defaults	⌄
17 Incoming		⌄

12) Numbering: customize the submittal numbering pattern (T-001, Transmittal 01, etc.).

13) File Naming Pattern: DocBoss renames files according to a specific pattern (typically including doc no and rev no) on submittal. The pattern can be customized here.

14) Headers and Footers: set document header and footer text and formatting (applied on submittal)

15) Markup Output: choose whether to include document markups on submittal, and enable/disable markup summary pages

16) Batching, Downloads and Medium: submittal delivery options.

17) Incoming: default setting for new submittals (specifically whether or not submittal numbers should be included for each target)

Submittal Email Notifications

18) Sender: set the "From" email address and contact info used when DocBoss sends submittal emails

19) Templates: choose the email templates used for submittal notifications

20) Enable/Disable and Attachments (by Target): choose the default for submittal emails (yes/no) per target, and the attachment/hyperlink options

View and Search Options
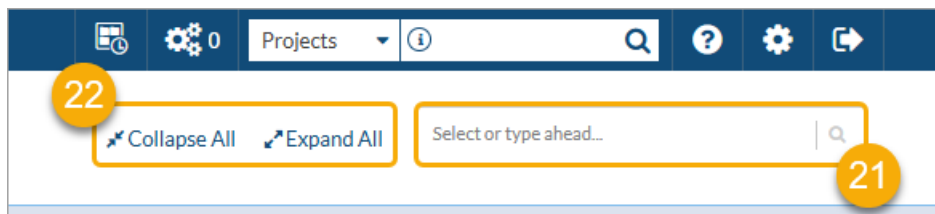
21) Collapse/Expand All: Opens/closes each drop-down on the page

22) Search: Searches for settings/options on the page

Log and Project Actions

23) Project (Main) Log: view log of changes to Project (Main) settings

24) Project Actions: save changes, copy projects, and mark projects as hidden or complete