

Project Main

10/23/2024 1:46 pm MDT

The Project Main screen 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 **Project Main** settings.



Any time a user returns to the **Project Main** screen on an existing project, the full list of settings will appear.



An explanation of each section in the image follows:

Project Settings

Project Settings		
1	Project Profile	▼
2	Doc Code and Status Lists	▼
3	Users and Contacts	▼
4	Turn Around Days	▼
5	Document Auto-Numbering Format	▼
6	Document Revision Settings	▼
7	Prices and Estimates	▼

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.

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 and Custom Fields

Other Data and Custom Fields		
8	Other Data	▼
9	Custom Fields	▼

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	▼
13	File Naming Pattern	▼
14	Headers and Footers	▼
15	Markup Output	▼
16	Batching, Downloads and Medium	▼

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.

Submittal Email Notifications

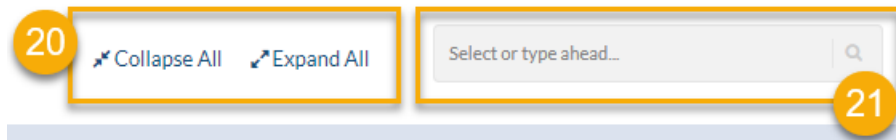
Submittal Email Notifications		✕ ↺
17	Sender	▼
18	Templates	▼
19	Enable/Disable and Attachments (by Target)	▼

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

18) **Templates:** choose the [email templates](#) used for submittal notifications

19) **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



20) Collapse/Expand All

21) Search

Log and Project Actions



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

23) **Project Actions:** save changes, [copy projects](#), and mark projects as hidden or complete
