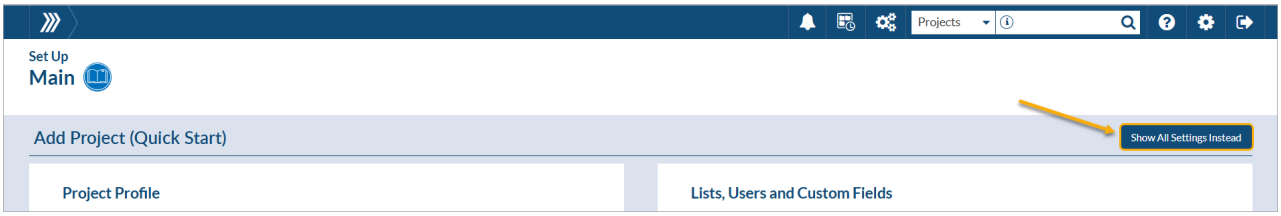
Project Main

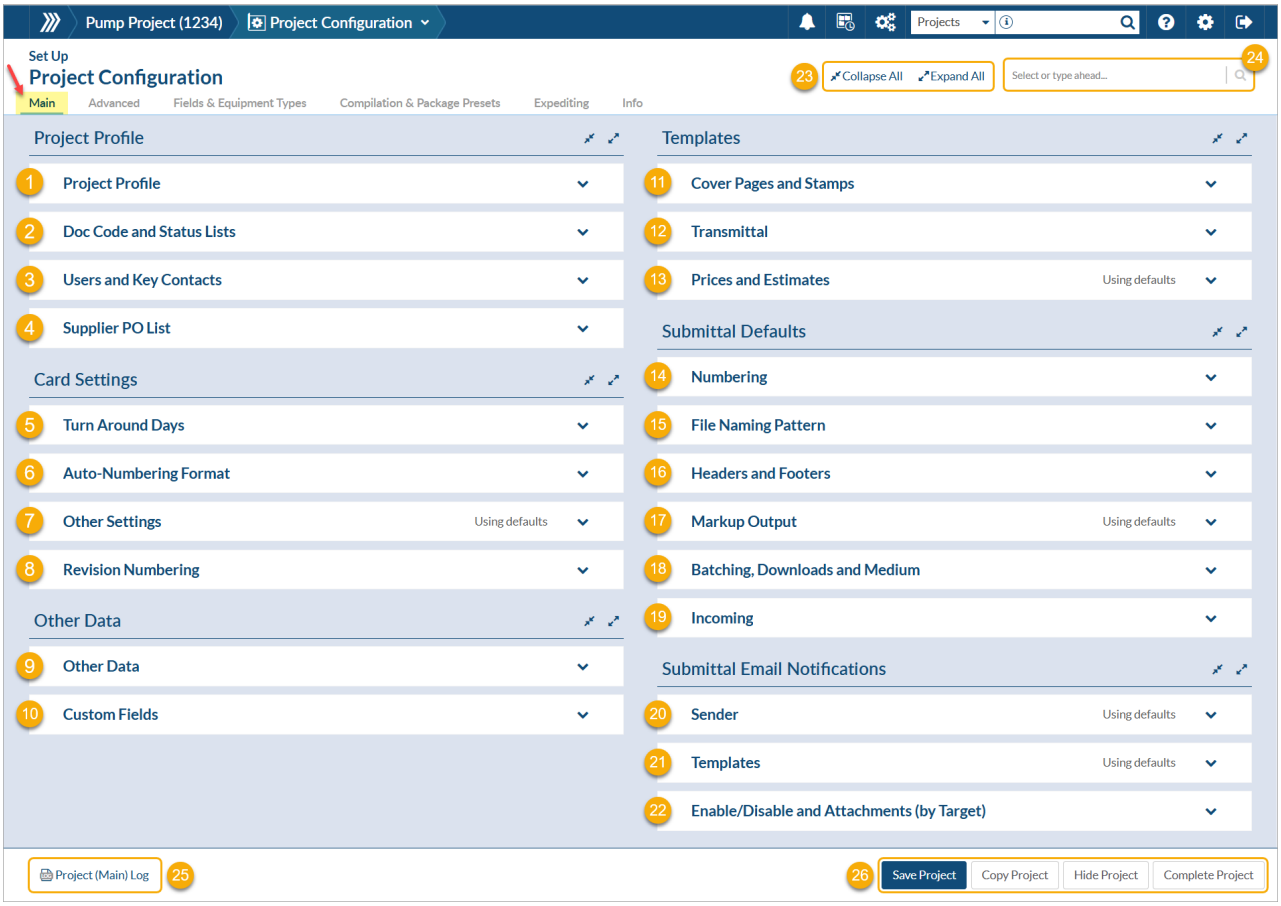
10/20/2026 4:30 pm MDT

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.

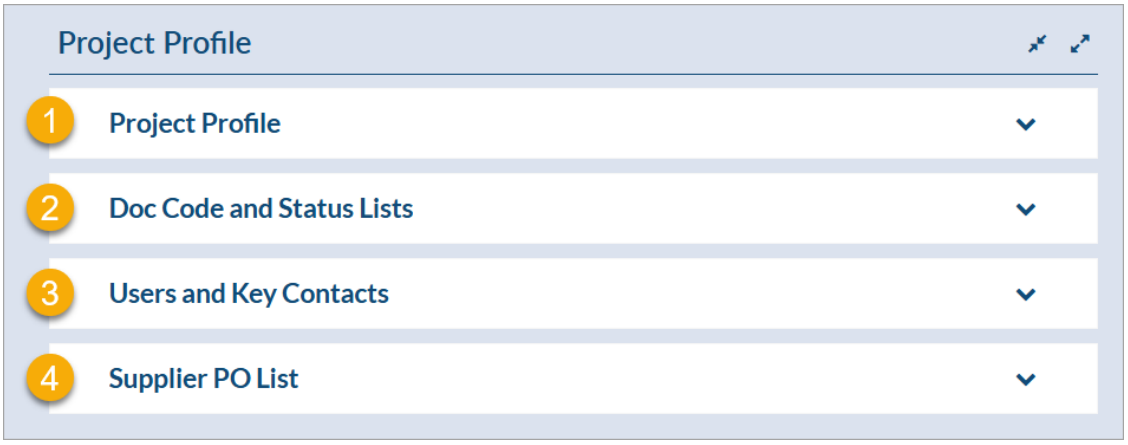


Any time a user returns to the "Main" tab of the Project Configuration page on an existing project, the full list of settings will appear.



An explanation of each section is as follows:

Project Profile



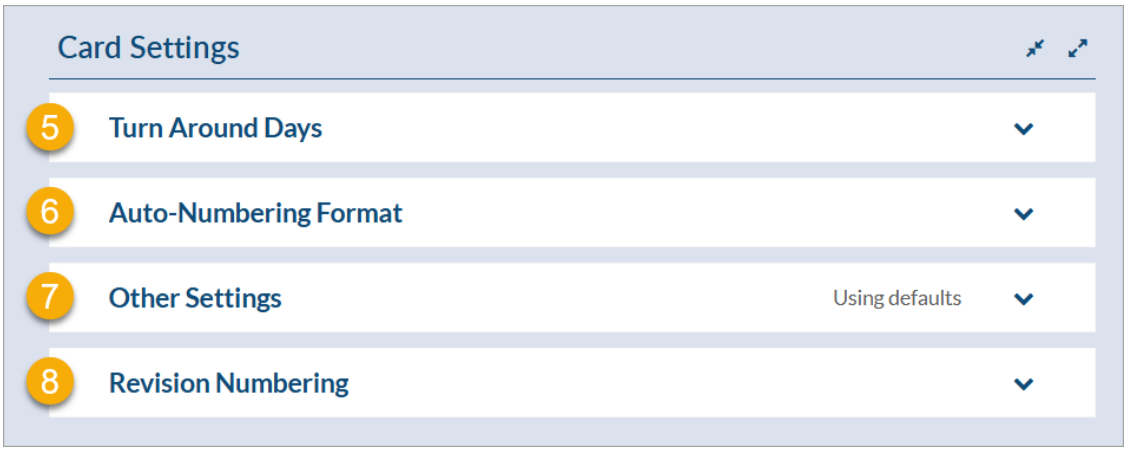
1) Project Profile: Project IDs and information about the companies involved in the project (Supplier, Customer, and End User). For an explanation of each field, see Project Profile Definitions.

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.

4) Supplier PO List: Record the unique PO number(s) for your sub-supplier(s) on the project.

Card Settings



5) Turn Around Days: Set the number of days for document turn around after initial submission (* see note).

6) Auto-Numbering Format: Set patterns for Customer and Supplier document numbering.

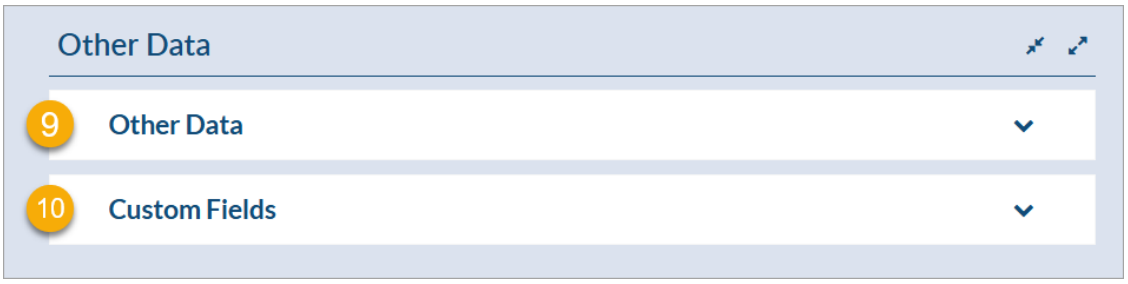
7) Other Settings: Set a card name suffix, a pattern for sheets, etc.

8) Revision Numbering: Set revision options and formats.

Note: Initial due dates are set on the doc code list using the Delivery Days and Reference Date values. These can be changed on the project, but are inherited from the master doc code list under the company profile. In turn, the default used for Delivery Days on master doc code lists is set under Admin > General.

For more information, see this article: Initial Submission Dates.

Other Data



9) Other Data: Paragraph-style notes field. These notes can be made available on the incoming documents page, the incoming documents assignment page and/or the outgoing submittals page. (see article: Where can I see project notes?)

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

Templates

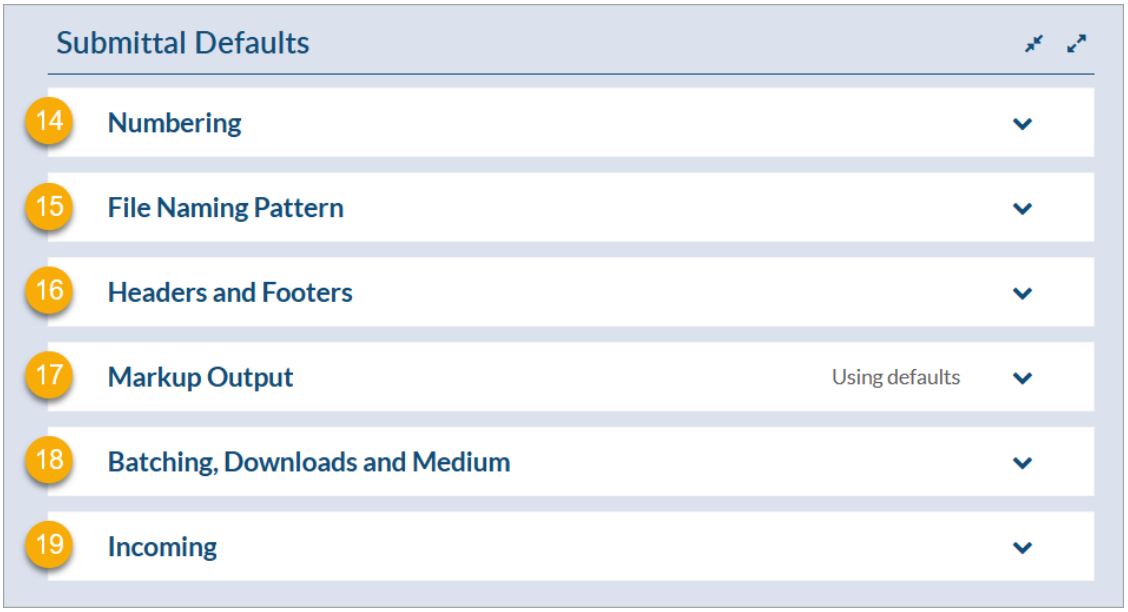


11) Cover Pages and Stamps: Choose the cover page and stamps templates and formats.

12) Transmittal: Choose the transmittal file template and format.

13) Prices and Estimates: Choose estimation template output.

Submittal Defaults



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

15) 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.

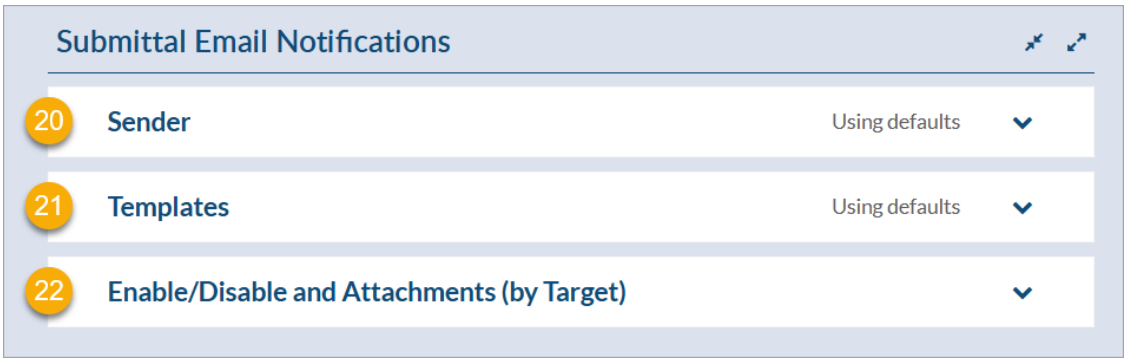
16) Headers and Footers: Set document header and footer text and formatting (applied on submittal)

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

18) Batching, Downloads and Medium: Submittal delivery options.

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

Submittal Email Notifications

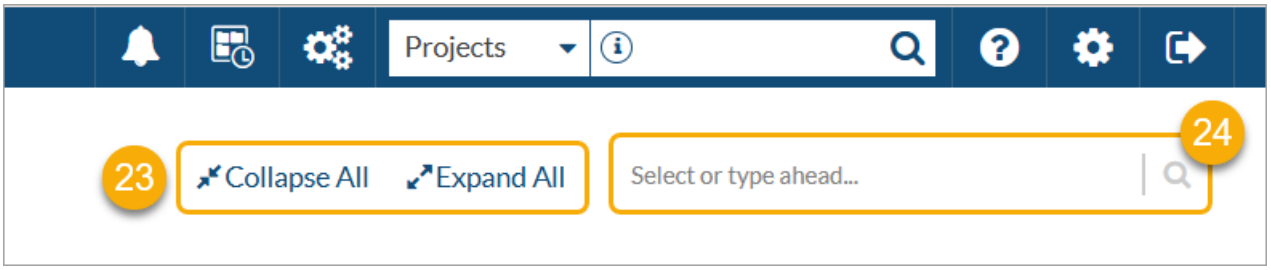


20) Sender: Set the "From" email address and contact info used when DocBoss sends submittal emails

21) Templates: Choose the email templates used for submittal notifications

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

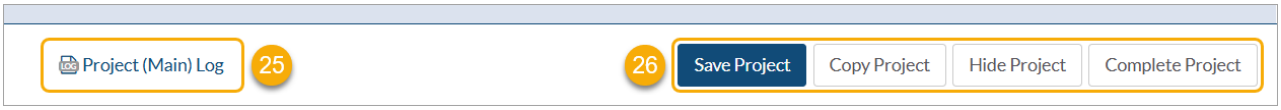
View and Search Options



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

24) Collapse/Expand All: Opens/closes each drop-down on the page

Log and Project Actions



25) Project (Main) Log: View log of changes to Project (Main) settings

26) Project Actions: Save changes, copy projects, and mark projects as hidden or complete

Note: A project can be un-hidden or re-opened from the same **Project Actions** area.

