Release Notes - September 2026

09/28/2026 3:32 am MDT

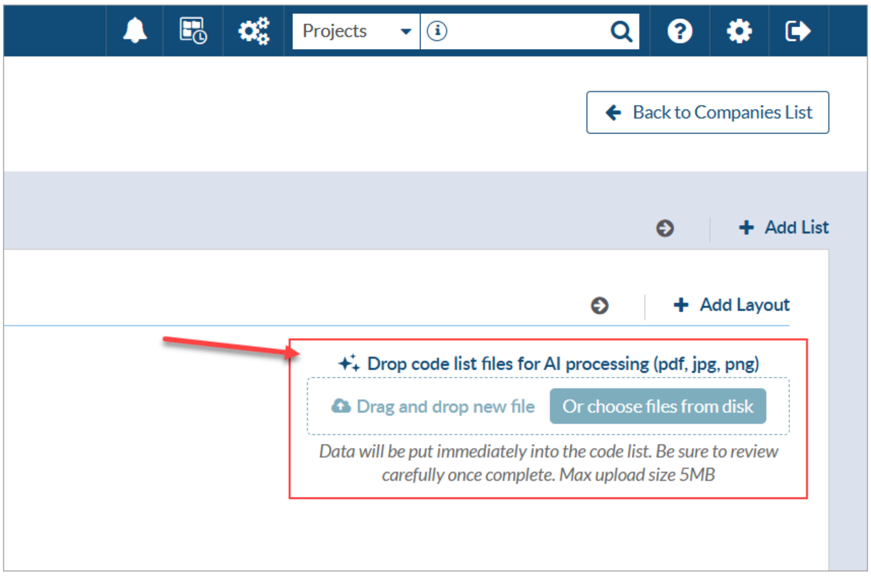
Here's a list of updates found in our September 2026 release, including AI Document Classification, Automatic Expediting Emails, and Packages.

Highlights

In this release, we are introducing artificial intelligence (AI)! For details, see this article: What are AI suggestions?

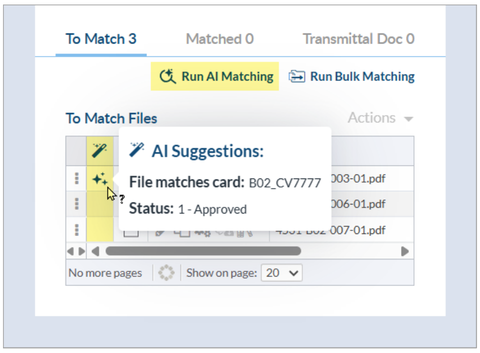
The two AI features being launched are:

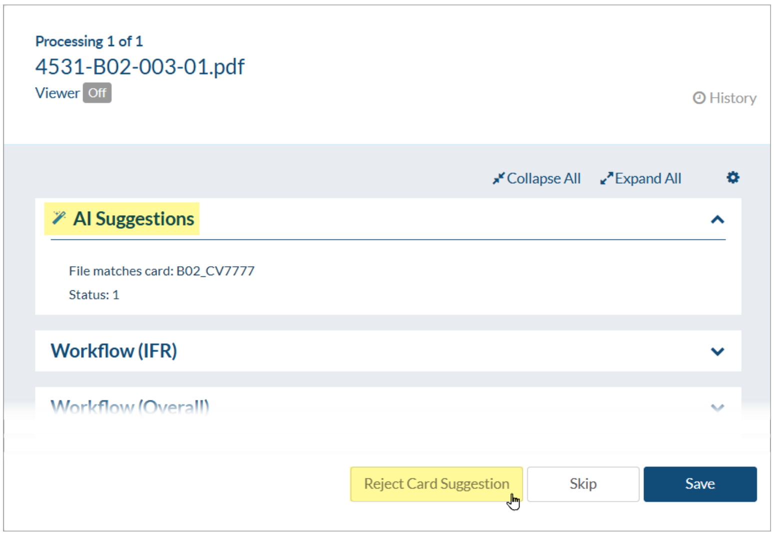
AI doc code extraction: Received a new list of requirements? You can now upload the list/table directly and DocBoss will extract the doc codes and doc code names from it. See this article to learn more: Add Company Doc Code Lists.



AI incoming document assignment: DocBoss now reviews the document's data (title, document number, revision, return status, etc.) and provides a suggested card match for you to accept or reject. See this article for more details: Assigning Files with AI.

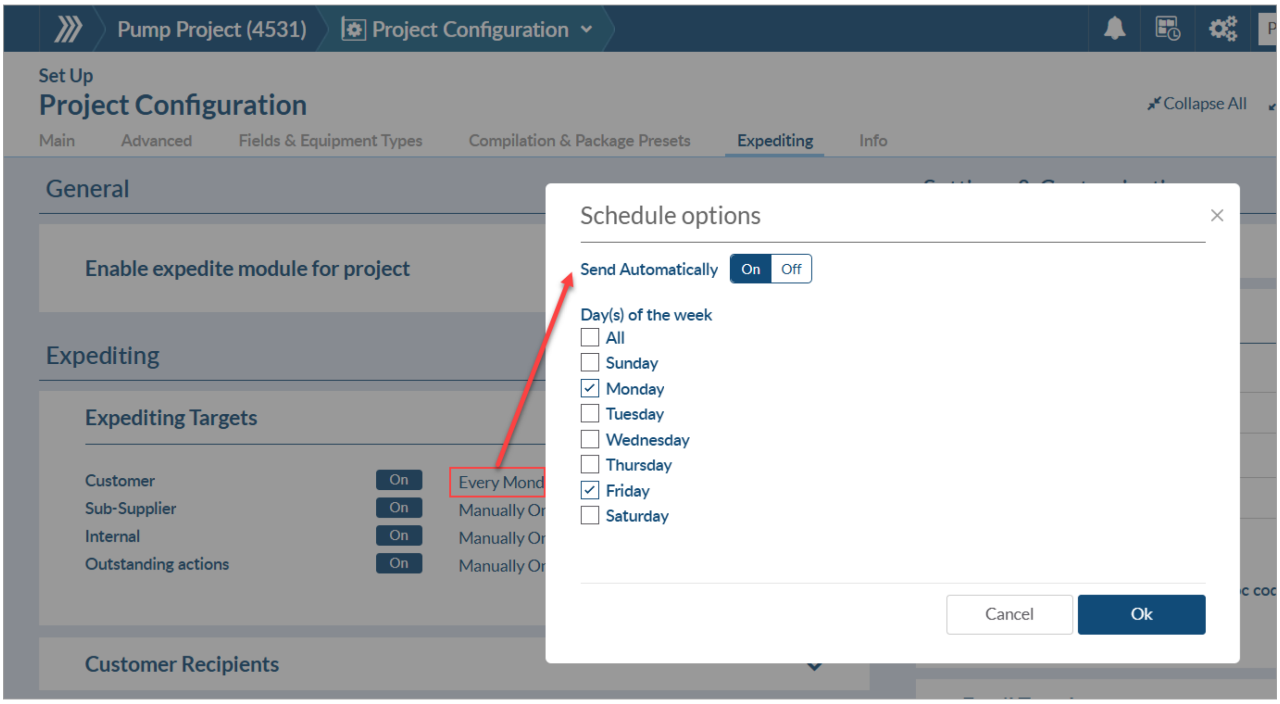
This feature will be introduced a **few weeks after the initial release.*



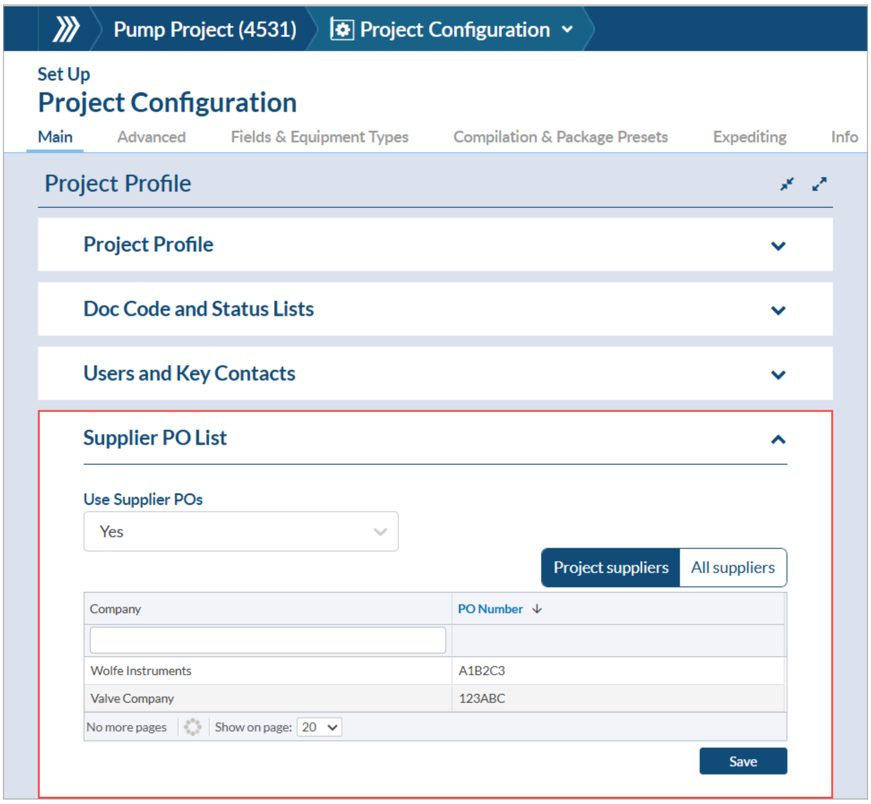


Some other highlights in this release include:

Automatic expediting emails: Expediting emails can now be sent on a schedule rather than manually. Schedules can include multiple days of the week and are set per enabled target (see article for details: Run Automatic Expedite Reports.



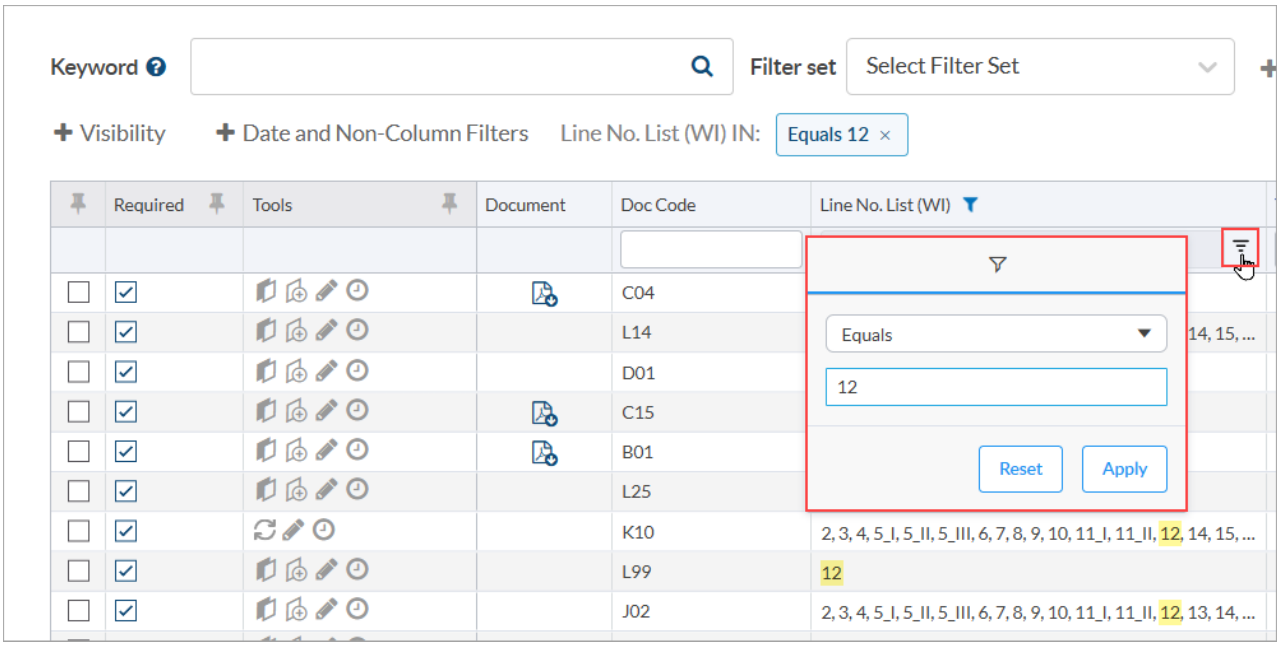
Sub-supplier PO numbers: Working with multiple sub-suppliers? If they each provide their own PO number, record them on the project and include this reference in submittal emails. If they send/receive files through the portal, they can also search by their own PO number (see article: Record Sub-Supplier PO Number(s))



Copy/paste on the card list grid: If you need to update a large number of cards at once, you can now copy data from one field to another directly in the grid (similar to working in Excel). See this article for instructions: Edit Cards in Bulk.

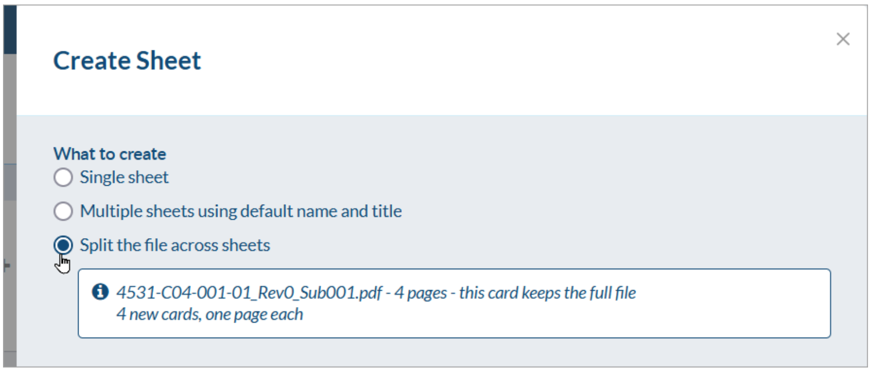
Card List

Filtering additions/updates: filters have been added to the revision # column(s) as well as to the title column. In addition, both the internal and customer line no. list columns have upgraded filtering capabilities, allowing you to choose the filter parameters (e.g., contains, equal to, etc.).



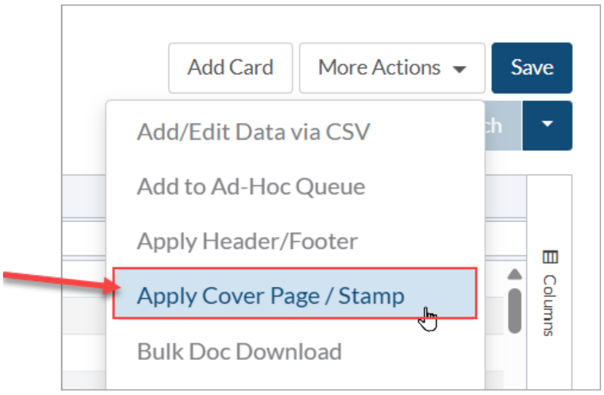
Split file across sheets: received a set of combined files (e.g., drawings) and want to manage each page separately?

DocBoss can now split multi-page files into separate sheets with a single click.



Doc no. override: Overwriting auto-generated document numbers (supplier/customer) and/or primary rev numbers via CSV can now be accomplished with a single checkbox - instead of typing override commands for each card, simply mark the checkbox on the "Add/Edit Data via CSV file" popup.

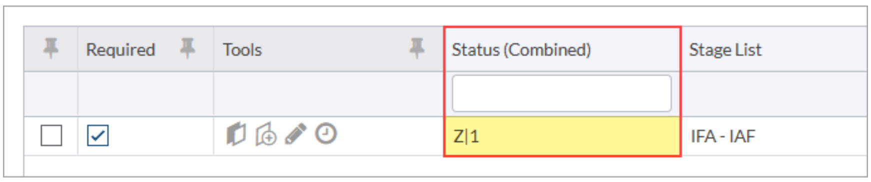
Bulk cover page/stamp update: The "Cover Page / Stamp" setting can now be changed on multiple cards at once by selecting the cards and choosing the option under "More Actions".



Manual card equipment adjustments: Previously, adjusting the tags linked to manual cards (via CSV) could only be accomplished by editing the corresponding line number. Now, the tag list can be edited directly, and the line number list will be updated in response.

Customer status on completed cards: If a system-completed card received a customer return status prior to completion, it will now show both "Z" and the latest customer return status (e.g., "1") in the "Status (Combined)" column (+ filter), as well as in the card's history.

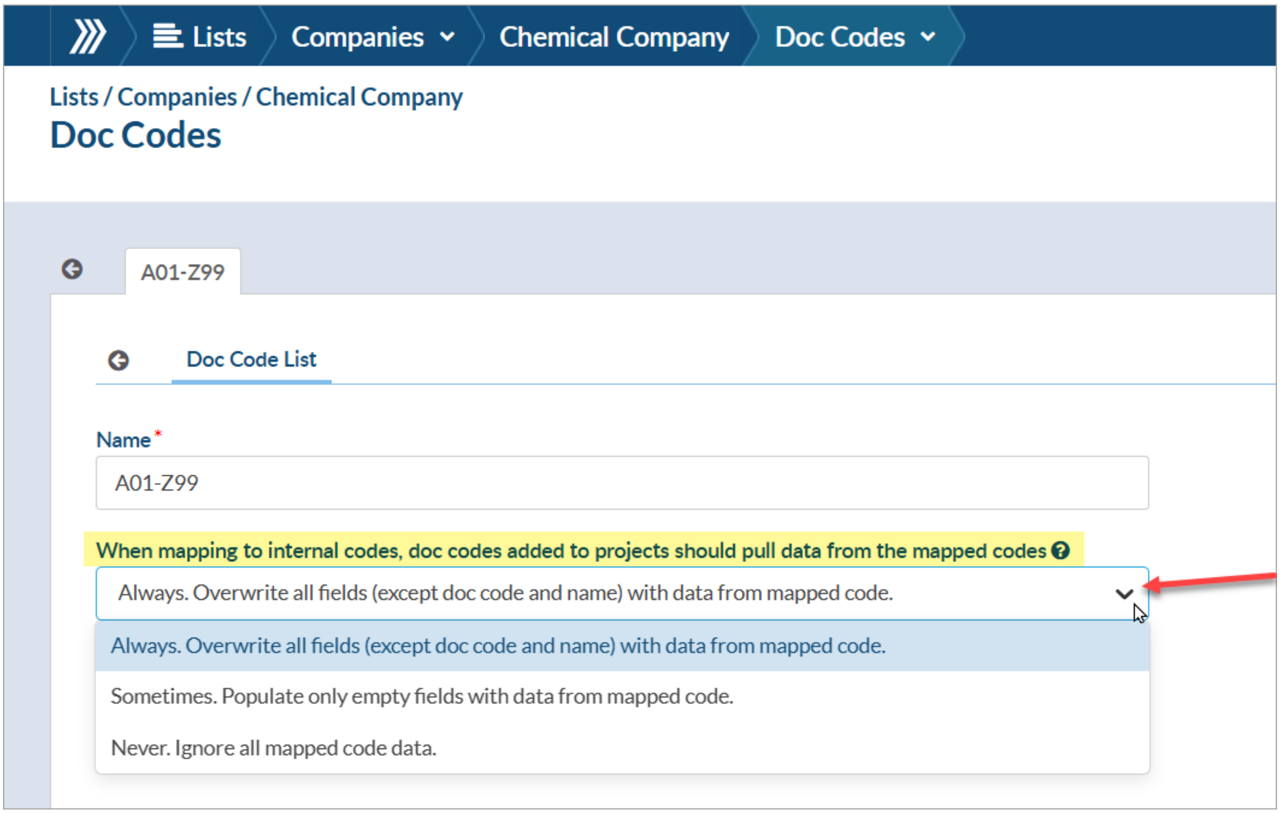
For example: If a card receives an "Approved" status ("1") in an earlier stage (IFA), this status will be shown upon system-completion of the later stage (IAF).



Equipment data for obsolete cards: If you choose to show obsolete cards on the SDI report, the tag list (and major tag list, if applicable) will now remain visible for improved traceability.

Doc Codes & Code Lists

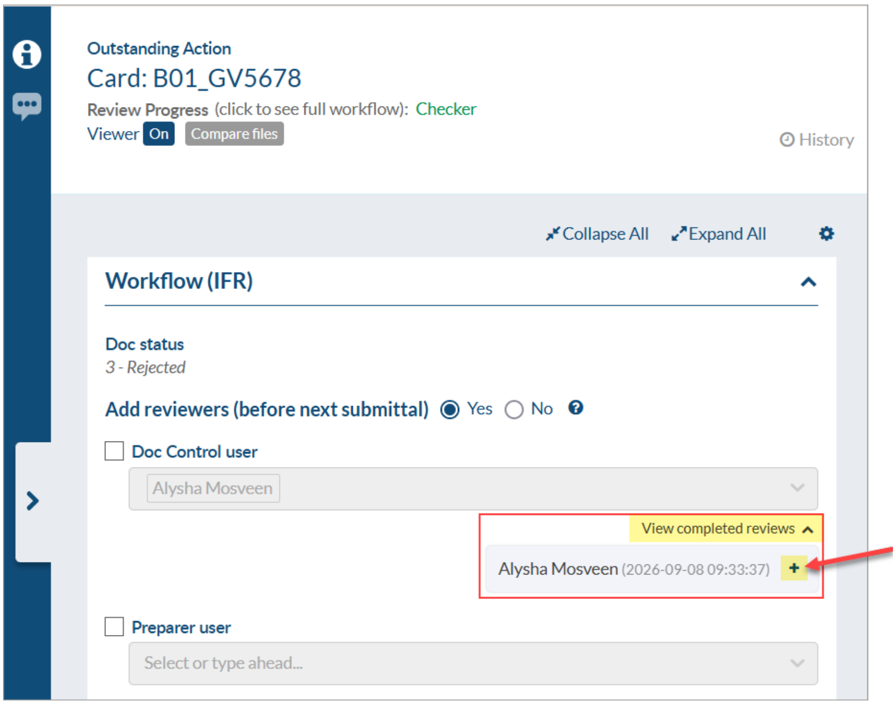
Mapped code field values: There is now a third option for loading values from mapped internal codes. The value from the mapped code can now (a) always overwrite fields from the mapped code, (b) populate only the fields left empty, or (c) be ignored entirely.



Routing scenarios on company code lists: Routing scenarios can now be defined on company and internal code lists so they can be inherited into projects. If the routing scenario defined on the doc code has not yet been added to the project, this will be done automatically at the time of import.

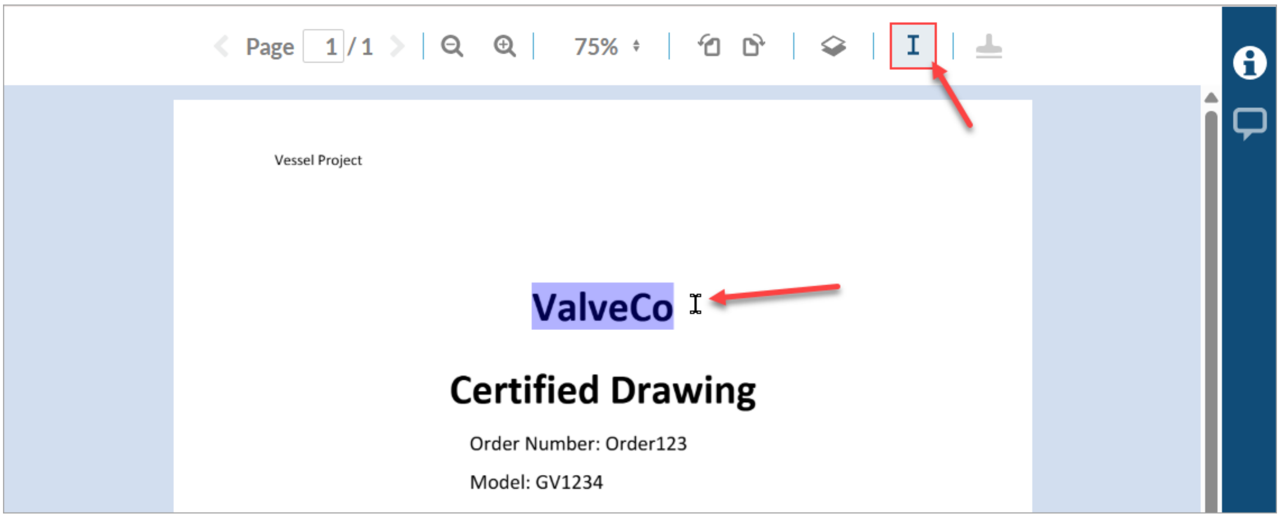
Outstanding Actions

View completed reviews: Users who have already completed their review in the current workflow are now visible from both the outstanding action and card edit forms. If they need to take another look at the document before sending, the card can be quickly routed back to them by clicking the "+".

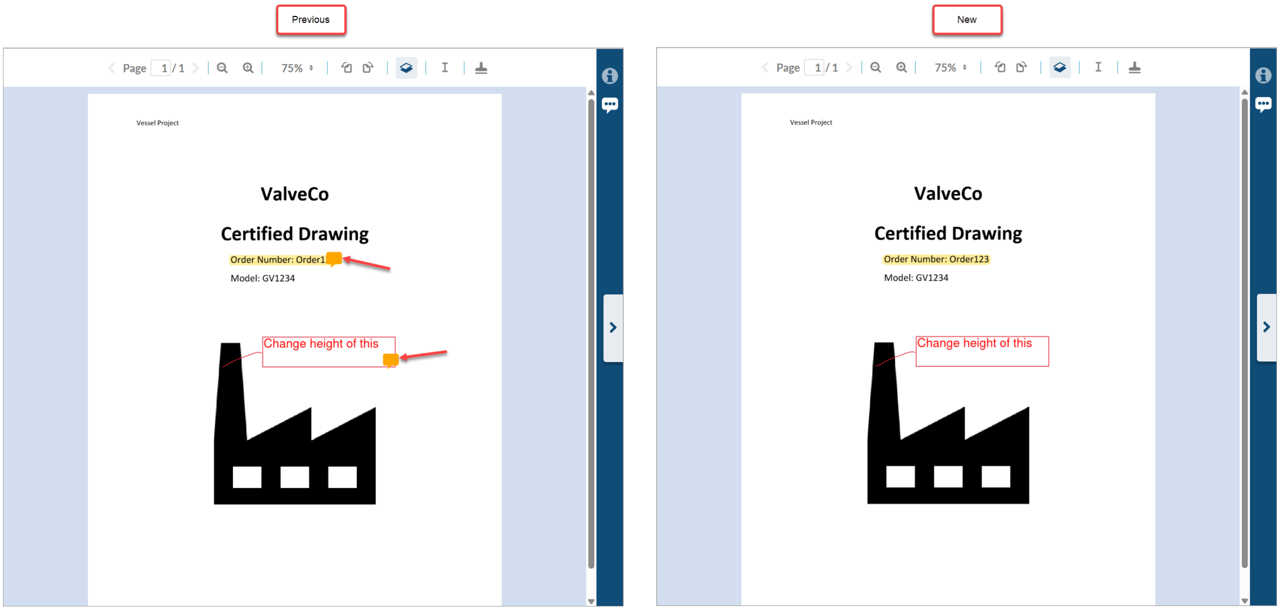


Incoming Documents

Copy text from active file: Text from the uploaded PDF can now be copied directly from the viewer (and pasted into card fields, such as the customer document number). If the Select Text tool is enabled, markups will be temporarily hidden.



Markup icon visibility: If an incoming file includes markups, the markup symbol is now hidden in the viewer (making it easier to read the text underneath). The symbol for Sticky Note-style markups will remain visible.

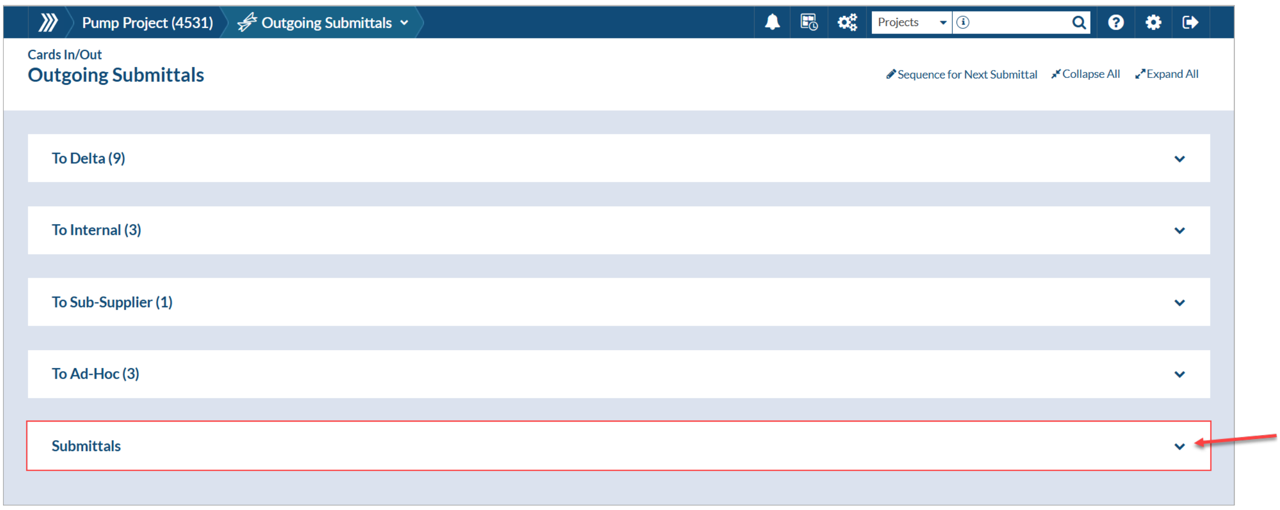


Files kept on complete-on-upload: Switching the current stage to a complete-on-upload stage now maintains the file and sets the card status to system complete (Z) instead of clearing the status. A confirmation notice is displayed before the change is applied.

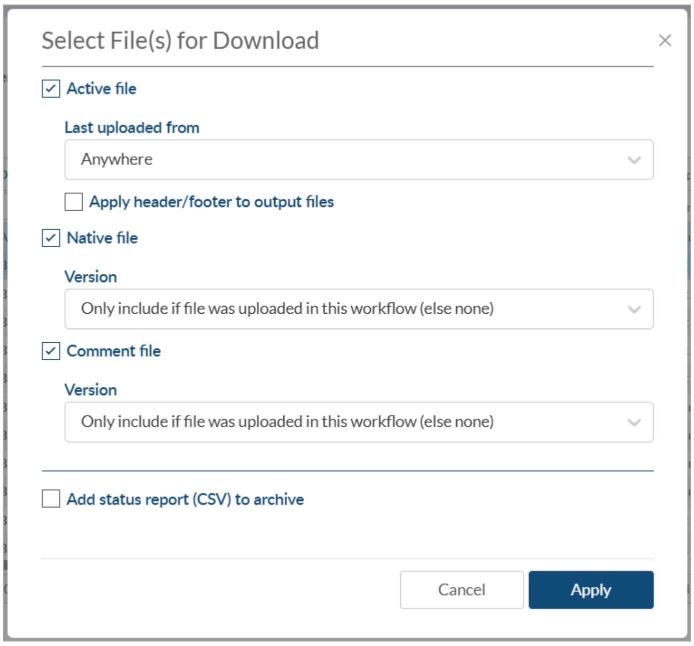
Reset status on completed cards: If you receive a new file for a card which has already been completed, the status can now be reset to "X" and the card can be queued for re-submittal via bulk processing <u>and</u> via outstanding actions (see article: How to re-submit documents that have been previously completed (approved)).

Submittals

Outgoing submittals on one page: After hearing your feedback on the separate "Sent Submittals" tab (introduced in the last release), the list of sent submittals has returned to the bottom of the Outgoing Submittals page.



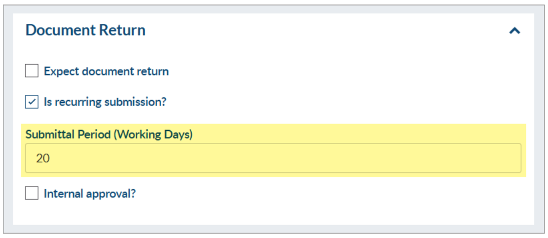
Bulk download by source: When downloading files in bulk, you can now choose which source the active file comes from (customer, sub-supplier, etc.), and which version of the native and/or comment file should be downloaded.

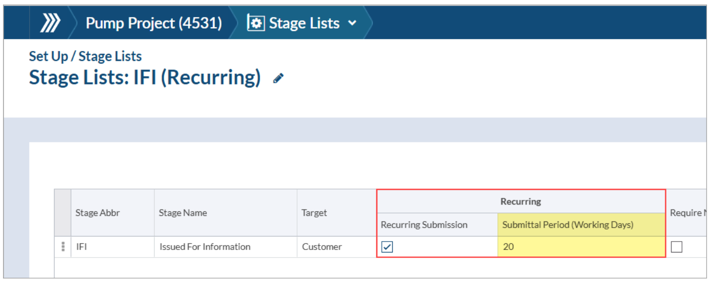


Submittal email document list: Previously available for customer submittal emails only, a list of documents included in the submittal can now be embedded into sub-supplier and internal submittal emails, too.

Preview cover page in Excel: Cover page previews can now be generated in both PDF and XLS format - both options are available from the card history screen.

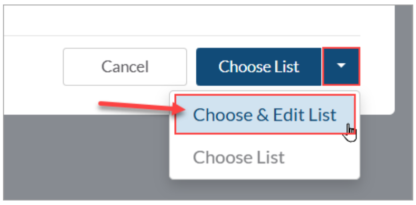
Recurring submittal due dates: Stages set to be recurring can now have a defined submittal period - set the number of (working) days, and after being submitted for the first time, the "Due to [*Customer*]" date will be updated automatically to match the submittal period.





Submittal date: To improve clarity, the time zone of the submittal date (i.e., the system time zone) will now be displayed in the column header. The submittal creation date will continue to be displayed in the user's time zone (see article: Sending Documents (Outgoing Submittals)).

Choosing a distribution list: When selecting a pre-existing distribution list, you will no longer be automatically re-directed to edit the list. If edits are required, you can select the "Choose & Edit List" option from the pop-up, or can click on the list name after the selection has been made.



Only users distribution list filter: When creating a new distribution list, the contacts list can now be filtered to only show DocBoss users. This filter can be used independently or in combination with the "Only project contacts" filter.

Packages

Packages have had a significant rework this release. The changes are summarized below; the full behavior, including exactly when Each cards sync with the package, is covered in the advanced guide: Working with Packages (Advanced).

Packages reach the outgoing submittal list: A package now becomes available for submittal once every card in it has a file assigned, with no routing and no suffix, in the same way a compilation does. Previously the package never appeared on its own and had to be found manually.

Each cards move with the package: When the package card moves forward to a later stage, the cards sitting in the stage it moved from move with it and take its status, so users no longer step each card through the workflow by hand. Cards with routing in progress, or in a different stage, are left untouched. Synchronisation runs in the background and a banner is shown while it is in progress.

Fewer duplicate stage lists: Where several doc codes share the same stage list, packaging them now reuses one z_ stage list rather than creating a numbered copy for each code.

Clearer choices on return: Choosing not to unpack a returned package now explains what will happen. Where the package is complete, the Each cards will not receive a copy of the returned files and will take the package's status. Where the package is not complete, the user must add themselves as a reviewer before saving, so they are notified of what the team uploads.

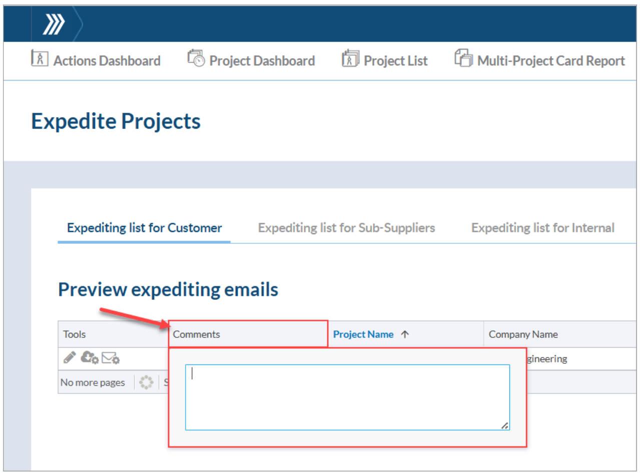
Manual stage changes are confirmed: Changing the stage on a package card by hand now warns that all Each cards will have their stage and status reset to match, and flags how many Each cards are incomplete or carry routing. Bulk and CSV changes apply without the prompt.

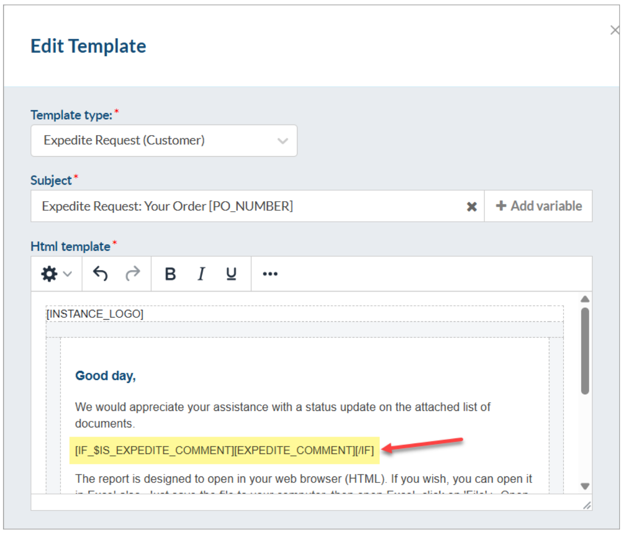
Regeneration locked while routed: The regenerate icon is greyed while a package has routing assigned, with a mouseover explaining that routing must be removed first.

Download the package from a card: Cards in a package now carry a link to download the package PDF, from card info and from the outstanding action popup, so a reviewer looking at one rejected card can see the package it was sent in.

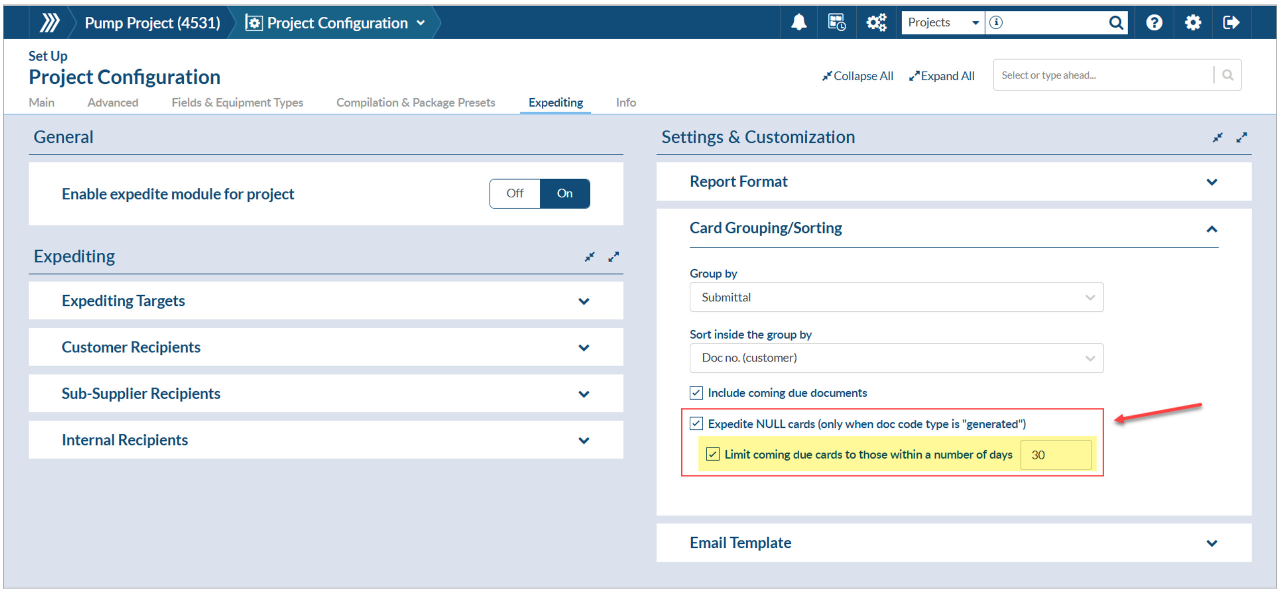
Expediting

Comments on expediting emails: It is now possible to add unique notes to expedite emails using the "Comments" field - if the [EXPEDITE_COMMENT] variable is included in the email template, any notes entered in this field will appear. The field is single-use, meaning that the notes will be cleared after the report is sent.



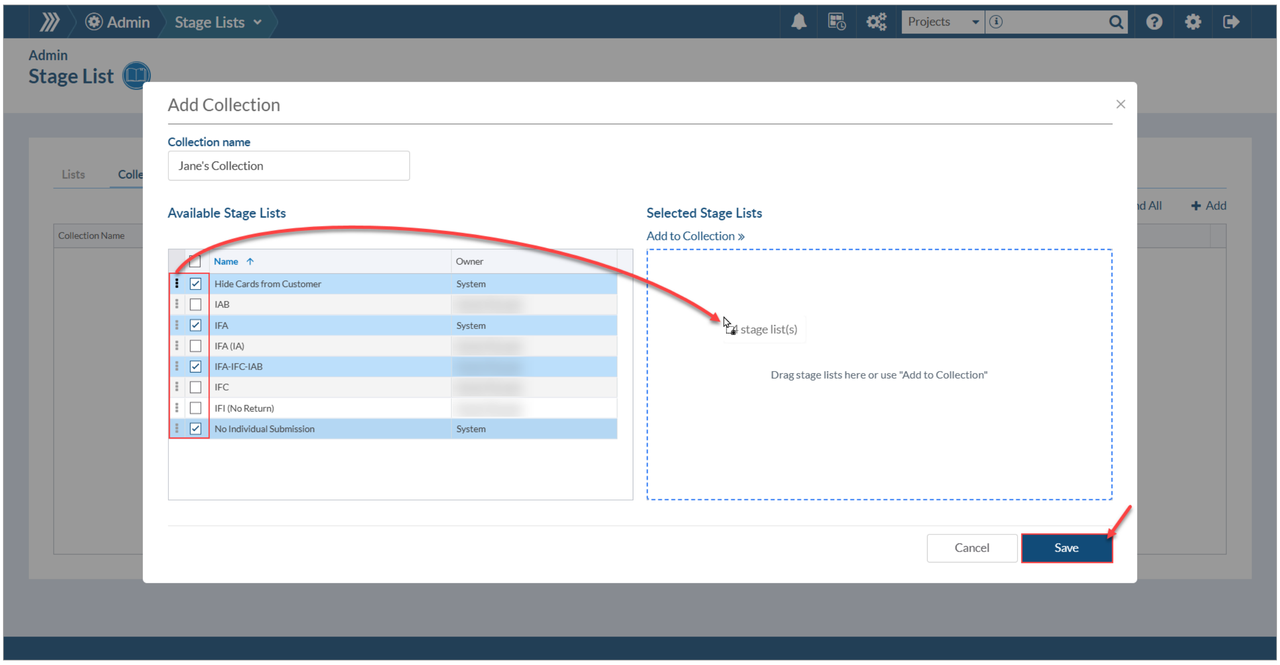


Limit coming due NULL cards: If NULL cards are included in expedite reports, it is now possible to limit the report to only include those which are due within a set number of days. NULL cards which are overdue will always be included, and cards <u>without</u> a due date will be excluded from the report.



Project Set Up & Configuration

Stage list collections: To make importing stage lists into a project easier, stage lists can now be gathered into named collections. You can define which collection(s) to import into new projects by default (by adding the collection(s) to your Project Configuration templates), and can import collections into existing projects if desired. For more details, see this article: Create & Manage Stage List Collections.



Number custom fields: A "Number" type is now available for custom fields - for doc code/card fields, library card fields, and project (main) fields. This update allows you to sort the column numerically (rather than by the first digit of the entered value).

Multiple key contacts: It is now possible to select more than one contact for each customer/end user role on a project. If the full list should be displayed on a template, there are now variables that will generate the full list of contacts.

Cover page templates: To simplify the Project Configuration screen, the options for Excel cover pages will now be hidden if there is no CSV/XLS template selected.

Update projects via API: It is now possible to update existing project details using the new "Update project" endpoint. Only the fields being changed need to be included in the call.

Templates & Variables

New padding variable: To improve Excel sorting, a "padding" parameter can be added to a variable to output numbers with a fixed number of characters.
Example: pad="4" turns "5" into "0005" (4 digits). Any values with 4 (or more) characters (e.g., 1234) are left unchanged.

New variables: There are three new cover page/stamp variables available - two internal approval-related variables outputting user information (job title and signature) and one equipment-related variable outputting a unique list of customer PO rev numbers.

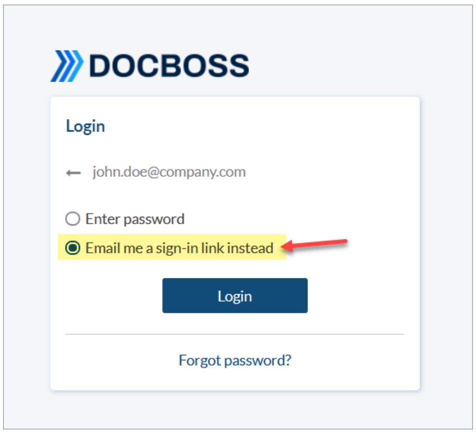
all_values parameters: both the *all_values* and *not_all_values* parameters now work across all list variables.

offset parameter: The output of the <RoleX_Users|outputField=FIELD> variables can now be customized using the offset parameter

Example: If there were two users listed for Role 1 (and you only wanted to generate the second name), you could use offset=1 (<Role1_Users|outputField=Name|offset=1>.

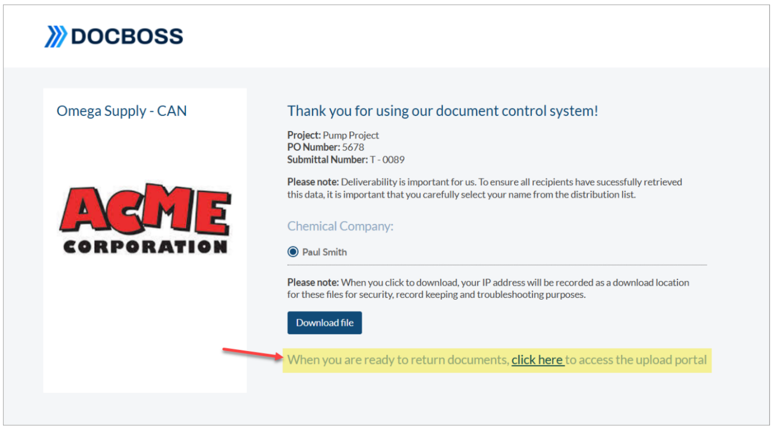
Portal (Customer & Sub-Supplier)

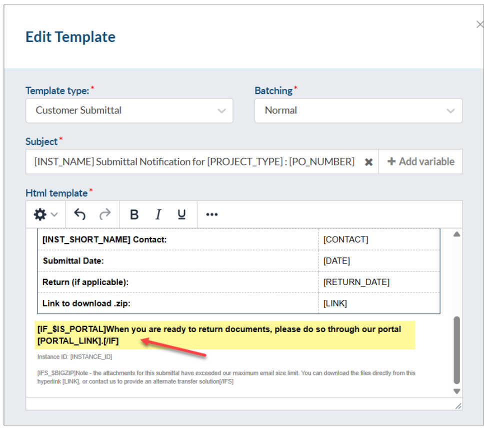
Portal sign-in: Customer and sub-supplier portal users can now sign in with a one-time link sent to their email (instead of logging in with a password). DocBoss users can also use this option (if not already using single-sign on (SSO) authentication).



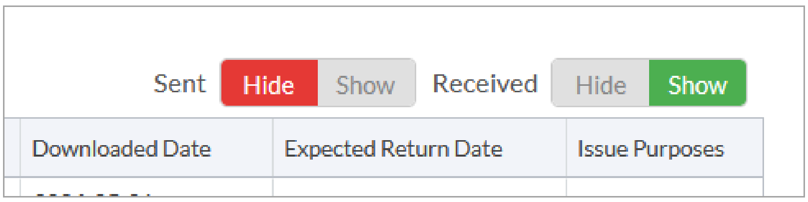
Return files from download link and/or submittal email: When a link to download files is provided the target (customer/sub-supplier), there is now a link provided for them to submit a return (through the portal) from the download screen. In addition, a new [PORTAL_LINK] variable is available for submittal email templates that provides a link to the portal.

Note: The recipient must have access to the portal in order to see these options - see the customer and supplier portal articles for more details.





Show and hide toggles: Portal users can now filter the grid to show/hide sent or received submittals. The toggle setting will be maintained between portal visits.

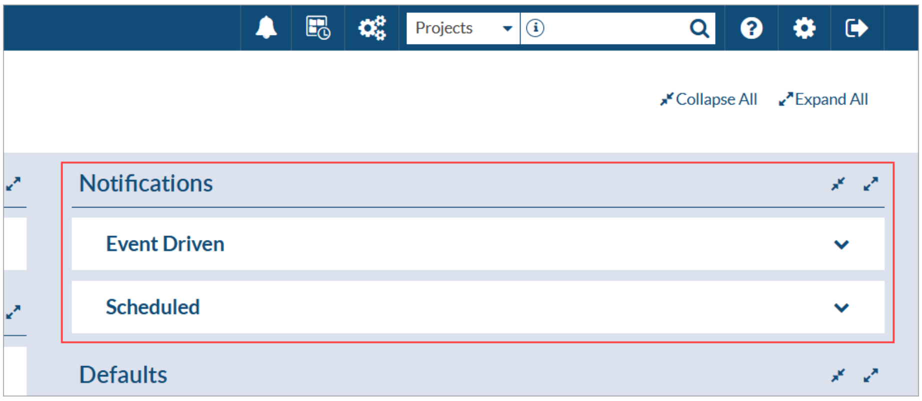


Portal identifiers: When logged into the portal, there will be an identifier in the bottom right corner indicating the company type (customer/sub-supplier), the company name, and the company's DocBoss ID number.

Reporting

More report filters: The assignment activity and project metrics reports can now be filtered by doc code (customer and/or internal) and by custom doc code/card fields. The filters you set will be saved for the next time you need to generate the report.

Notification categories: The notifications/reports in the user profile are now grouped as "Event Driven" and "Scheduled" (replacing the previous "System" and "Email" groupings) so it is clear what triggers each one. Which notifications a user receives is unchanged.

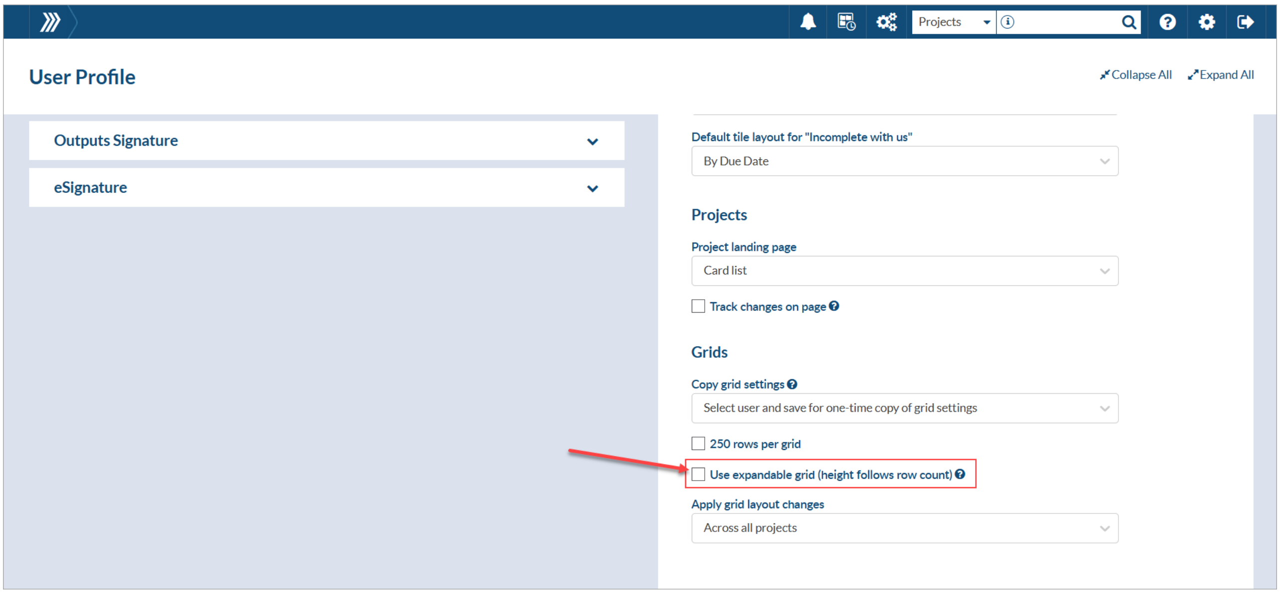


Overdue cards report: The supplier company name will now show the affiliate name (selected on the project) rather than the default instance name.

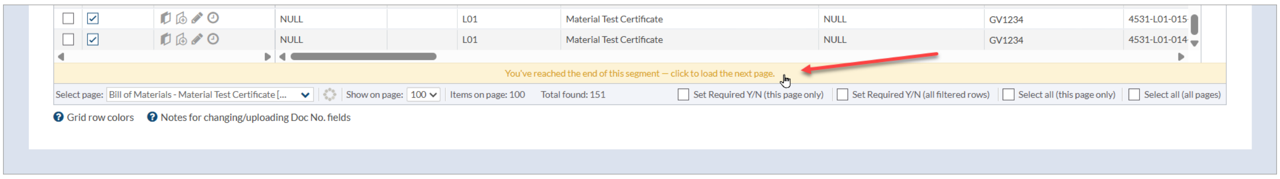
New API endpoints: Reporting-related calls have been added, allowing you to generate and downloaded directly from the API.

User Interface

Revert card list grid layout: Prefer to see a longer card/code list grid? The option to switch back to the original grid configuration is available under the user profile.



End of page marker: If using the new card/code list grid, a yellow note will now appear to mark the end of the loaded data. To move to the next page, you can click the notice



Additional Notes

Package number column: The package number (RFQ number for "Quote" projects) has been added to the Project List. The column is both sortable and filterable.

Equipment sub-supplier: To prevent an import error, the affiliate selected on the project will now be set as the sub-supplier automatically if the sub-supplier field is left blank on the uploaded CSV.

Library permissions: Library access can now be customized for each DocBoss user (from Manage Users > Tools > Permissions). In addition, users with a view/reviewer license type can now access the library. See this article for more details: Library Documents.

If you have any questions or feedback regarding our latest release, please reach out to our Support team and we'll be happy to assist.
