

# Format Import Companies in XLS

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This article is a guide for formatting the Excel Import file for bulk adding/editing companies.

To get here, from the system menu, select **Lists > Companies > Excel Import/Export**.

## Steps:

1. Download the template from **Export Excel file > Download file**. Note that this template includes only customer and sub-supplier companies, not affiliate companies.
2. Update the list. Leave the first row (headers) as is. All other existing rows can be removed (this will not disable these companies) or they can be edited.
3. Import back to DocBoss through the **Excel Import/Export** popup by uploading the file and selecting **Import**.

## Fields

- **ID**: The internal database ID for the company. Leave this field blank if adding a new company.
  - **Name\***: Company name. Must be unique. This field is mandatory.
  - **Short Name\***: Company short name (for grids, templates etc.). Must be unique and at least 2 characters long. This field is mandatory.
  - **Phone**: Company phone
  - **Fax**: Company fax
  - **Is Sub-Supplier?**: Enter "Y" if the company is a sub-supplier. Leave blank or enter "N" if not.
  - **Is Customer?**: Enter "Y" if the company is a sub-supplier. Leave blank or enter "N" if not.
    - Companies must be sub-supplier, customer, or both.
  - **[Instance] External Reference**: Internal field for managing company list.
  - **Default Cover Page Count**: Default expected cover pages when files returned from company (customer only).
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