

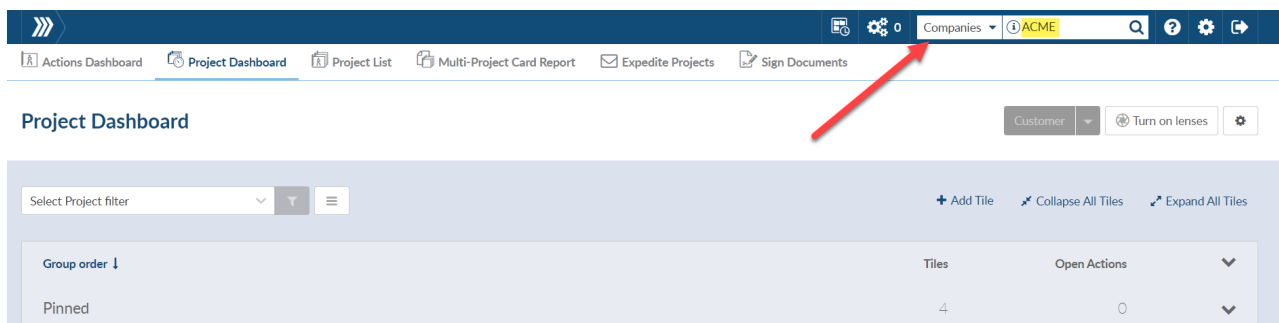
Affiliate Best Practices and Maintenance

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Best Practices

Adding Companies

- Use an external reference ID for new companies from a shared business system. This avoids duplicates being added with alternate spellings. DocBoss will warn you if the name it is exactly the same but if there are any differences the system will consider it as a new Company.
- Before adding a new company check if it has already been created. Use global search when checking.



- If the company has been already, check for the data you need on your project. Don't double enter data that already exists.
 - Addresses
 - Contacts
 - Doc Codes
 - Return Statuses
 - Templates

Administration

Host quarterly meeting of doc control leads.

Project Templates

- Create a Project Template for each affiliate. New templates can be created, but always start from the original affiliate specific template.

Affiliate Defaults

- Enable the affiliate specific defaults on each affiliate company.

General Defaults

- Agree among all members about settings on the "General" admin tab.
- Avoid changing them without approval or all affiliates.

Stage Lists:

- Use the description field to add detailed explanations of created stage lists when added to simplify the selection from pre-existing stage list.
- Stage Lists based on complex/detailed requirements within a project should be created at the project level (vs admin)

Distribution Lists:

- Distribution Lists in Admin should be created only for recurring lists.

Compil. & Pkg Presets (List):

- Create a default, and link it to the affiliate specific project template.

Creating custom fields

- Create all custom fields at the admin level (NOT on project). Import the custom field into projects/templates

Data Management

Monthly review

Templates

- Review newly added templates to ensure they are named appropriately, have description information added.

Stage Lists

- Review newly added stage lists to ensure there are no duplicates/ensure they have explanation about why they are unique.

Companies

- Sort/export company lists and check for duplicates.

Library

- Review library documents to check expiry dates.
- Check for duplicate library documents.

Users

- Review users lists and disable user accounts that are not being used anymore
- Review user access and remove affiliates which are not applicable.

If there are other items which our users review from a maintenance perspective, please let us know and we'll update our article!
