

Affiliate Companies

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Topics

1. [Overview](#)
2. [Add affiliate companies](#)
3. [Assign project to affiliate](#)
4. [Affiliate user access](#)
 - [Assign licenses per affiliate](#)
 - [Update user access](#)
5. [Customization per affiliate](#)
 - [Project Templates](#)
 - [Affiliate admin settings](#)

Overview

Affiliate companies can be created in DocBoss if users need to set different outputs based on internal companies.

>>>

Lists

Companies

Lists

Companies

Name	Short Name	Is Internal?	Is Customer?	Is Sub-Supplier?	Tools
Wolfe PA Valves	W\Valves	✓			
Wolfe PA	Wolfe PA	✓			
Wolfe CA	Wolfe CA	✓			
Wartsilla	Wartsilla		✓		
Supplier1	Supplier1			✓	
Stator	Stator			✓	
Shell	Shell		✓		
Rotork	Rotork			✓	

Affiliate companies allow for:

- Sorting projects by affiliate
- Limiting user access to projects and library documents by affiliate
- Using different Code List/Names on output documents per affiliate
- Configuring various general default settings per affiliate
- Different outbound generic email per affiliate

- Designate licensing per affiliate

Important!

All instances have at least one affiliate (the first internal company). If additional affiliates are added, these are NOT sub-companies of the original internal company. They are separate internal companies.

Add affiliate companies



This feature is typically used to allow separate organizations to share one DocBoss account. Depending on your company's DocBoss license agreement, the option to add new affiliates may be available through the user interface. If you have [Security permissions](#) and do not see this option, please contact DocBoss support about adding an additional affiliate.

Admin Users with the Security Permission can add additional affiliate companies as needed. From **Lists > Companies**, select the **Add Affiliate** option on the top right of the grid. Complete the required information and save.

Note that after adding an affiliate, user permissions will need to be updated to allow access for any users who require it.

Assign project to affiliate

When starting the project, users can select the Affiliate in the **Main** set up.

Set Up Main

Profile

Project Type

Affiliate

Affiliate Address

Customer

Customer Address

Project Name

Project Description

Job

Alpha Sales Order

Order ☒ Quote ☐

* Alpha Supply

* Select Affiliate -

* Alpha Supply

* Alpha Supply CA

* Alpha Supply PA

* - Select Job -

Affiliate user access

Assign licenses per affiliate

User licenses can be distributed per affiliate to make managing access between divisions easier for DocBoss administrators.

Admin users can view license allotment and use from the **Manage Users** screen (1). For a detailed breakdown, select the arrow on to the right of the list to expand the license deployment panel (2).

Users

Manage Users

Send outstanding actions reports

User accounts

Extended Support: 1 / 1

License Deployment Total Admin/Full Reviewer View

All accessible affiliates 13 / 60 8 / 17 3 / 27 2 / 16

Filter by affiliate Select or type ahead... where user relationship is ☒ Primary ☐ Project ☐ Library Inactive accounts Show Add user

Colour	Name	Tools	Role	Receive outstanding actions report	Receive outstanding actions alert	Receive internal approval actions alert	Security Permission	Commercial Contact	Extended Support Access	Primary Affiliate
			admin							Alpha Supply
			admin							Alpha Supply
			admin							Alpha Supply

The license deployment panel displays a breakdown of the used and total available licenses per each affiliate.

Extended Support: 1 / 1

License Deployment	Total	Admin/Full	Reviewer	View
All accessible affiliates	13 / 60	8 / 17	3 / 27	2 / 16
Alpha Supply	13 / 40	8 / 10	3 / 20	2 / 10
Alpha Supply CA	0 / 15	0 / 5	0 / 5	0 / 5
Alpha Supply PA	0 / 5	0 / 2	0 / 2	0 / 1

Changes to the license allotments per affiliate can be requested through DocBoss support.

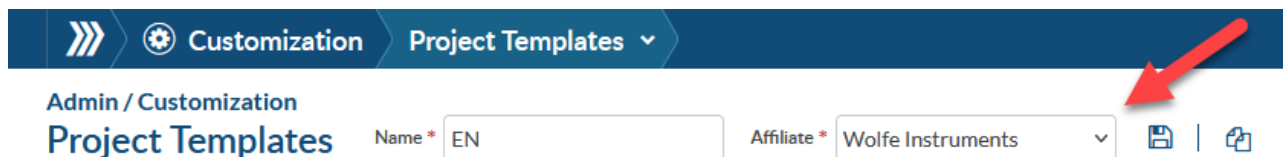
Update user access

For instructions on editing affiliate permissions for individual users, please see [Enable Affiliate Permissions for a User](#).

Customization per affiliate

Project Templates

Project templates, including their assigned Output Templates, can be assigned to specific affiliates under **Admin > Customization > Project Templates > Affiliate**.

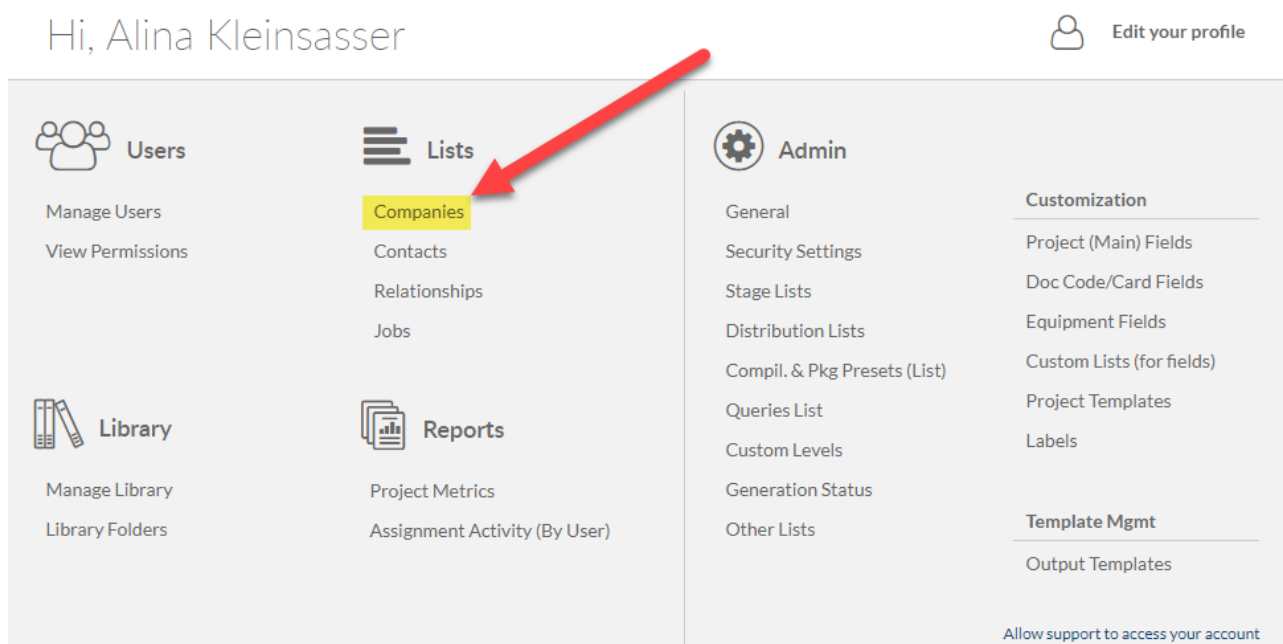


Affiliate admin settings

By default, affiliates use the default admin settings found at **Admin > General**. Some of these settings are available to be customized per affiliate, and more will be added in the future.

Navigation

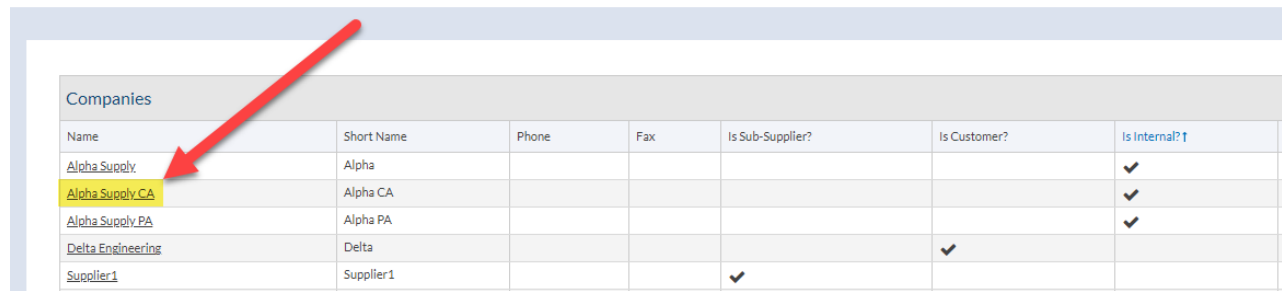
1. From the system menu, select **Lists > Companies**.



2. Select the name of the appropriate affiliate.

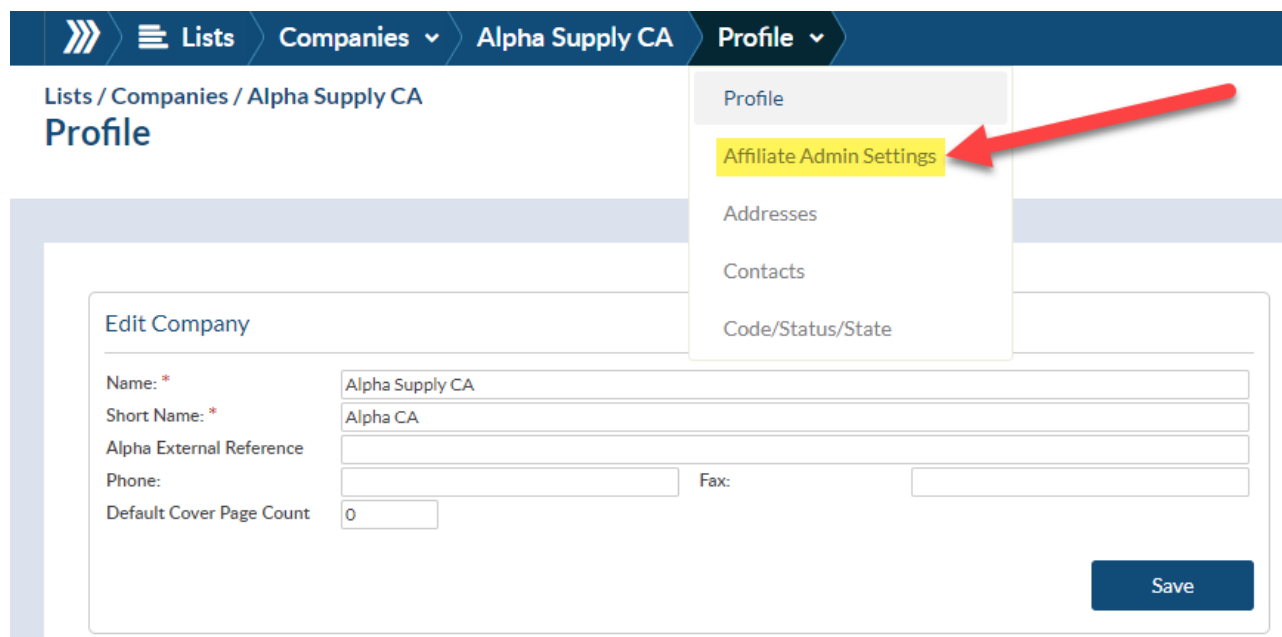
Lists

Companies



Companies						
Name	Short Name	Phone	Fax	Is Sub-Supplier?	Is Customer?	Is Internal? ↑
Alpha Supply	Alpha					✓
Alpha Supply CA	Alpha CA					✓
Alpha Supply PA	Alpha PA					✓
Delta Engineering	Delta				✓	
Supplier1	Supplier1			✓		

3. From the dropdown menu at the top of the screen, select **Affiliate Admin Settings**.



Navigation: >>> Lists Companies ▾ Alpha Supply CA Profile ▾

Lists / Companies / Alpha Supply CA

Profile

- Profile
- Affiliate Admin Settings**
- Addresses
- Contacts
- Code/Status/State

Edit Company

Name: * Alpha Supply CA

Short Name: * Alpha CA

Alpha External Reference

Phone: Fax:

Default Cover Page Count 0

Save

Configure affiliate admin settings

To override the default settings listed in **Admin > General**, select **Build general settings override for Affiliate**.

Just using the defaults right now..

Alpha Supply CA uses the default general admin settings found at Admin > General.

If you wish to establish overrides for these values (for use only on Alpha Supply CA Projects), please click the button below.

Build general settings override for Alpha Supply CA

Settings available to customize in this area are:

- User Defaults
 - Regional Settings
 - Time zone
 - CSV delimiter
- Project Settings

- Submittals
 - Outbound Generic Email Address
 - Outbound Generic Email Name
 - Email FROM Address Settings
 - *Note - this selection will overwrite the value selected on the project template*
 - Contact Info
 - *Note - this selection will overwrite the value selected on the project template*

Any options not available to be customized per affiliate will use the settings configured in **Admin > General**.

To revert to instance settings for a particular affiliate, select **Switch back to instance settings** from the **Affiliate Admin Settings** screen.



The time zone set on Admin > General will be the time zone used when generating submittals (submittal date is based on instance time zone), even if custom affiliate admin settings are being used. However, the submittal **creation** date will always be reflected in the user's selected time zone (set on their user profile).