Affiliate Companies

08/02/2024 3:38 pm MDT

Topics

Overview

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

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
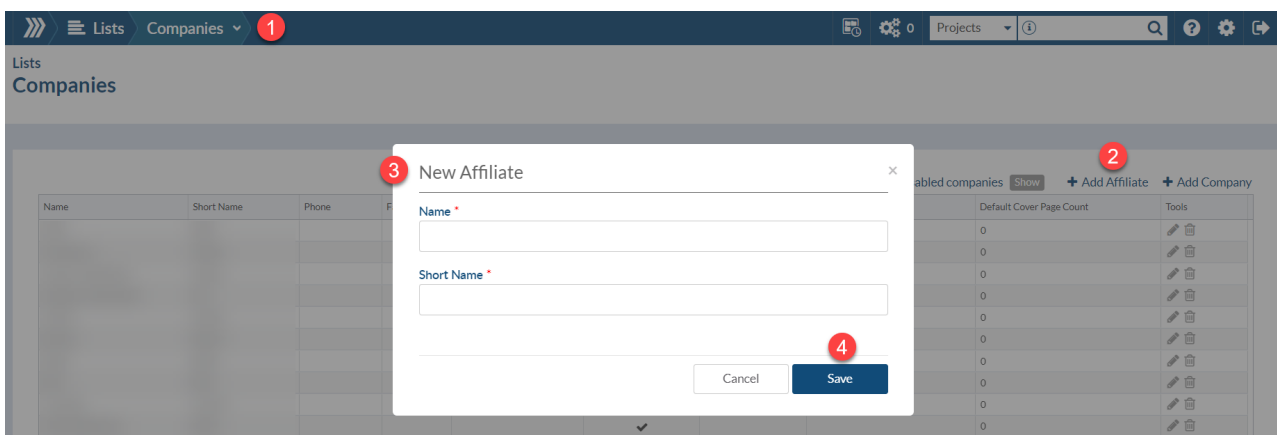
- Designate licensing per affiliate

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.

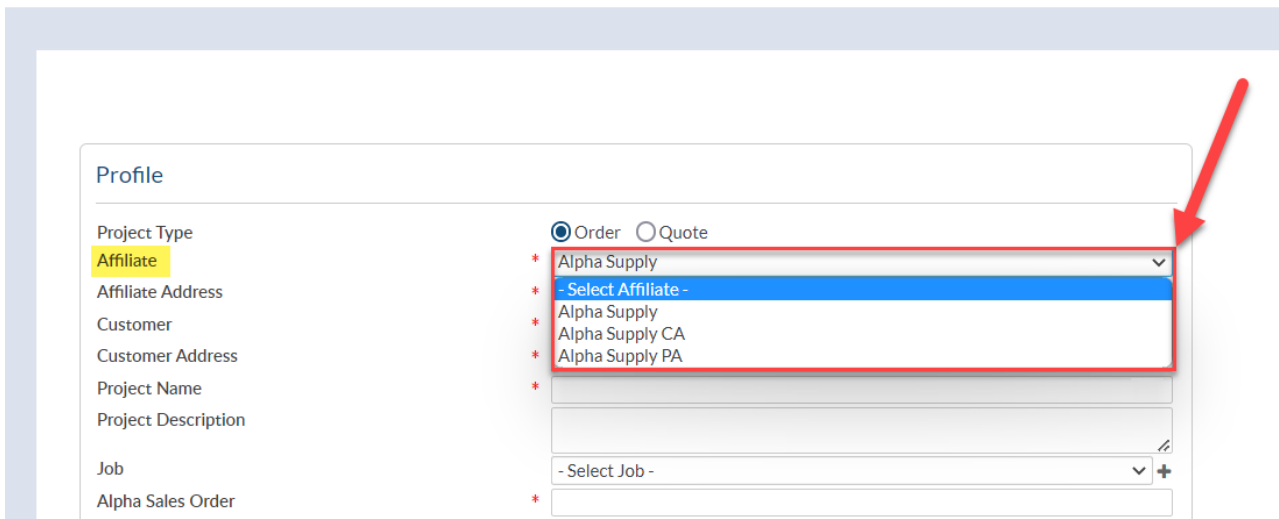# Add affiliate companies

*This feature is license dependent

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.
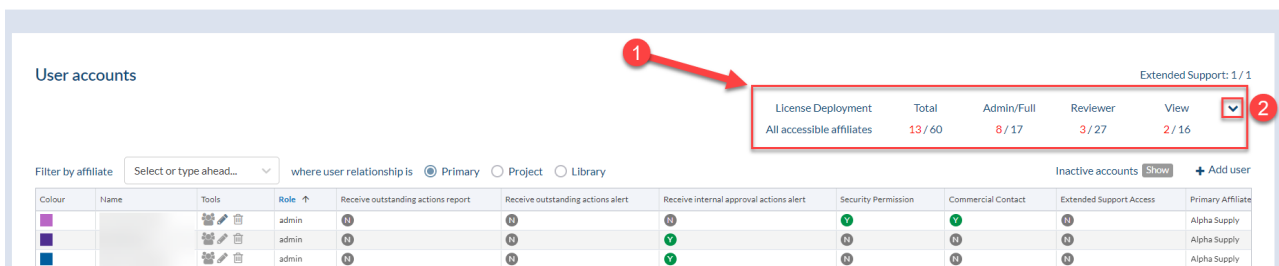
Affiliate user access

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).

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

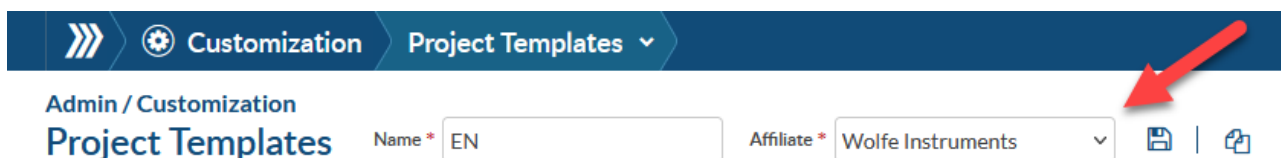Changes to the license allotments per affiliate can be requested through DocBoss support.

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**.
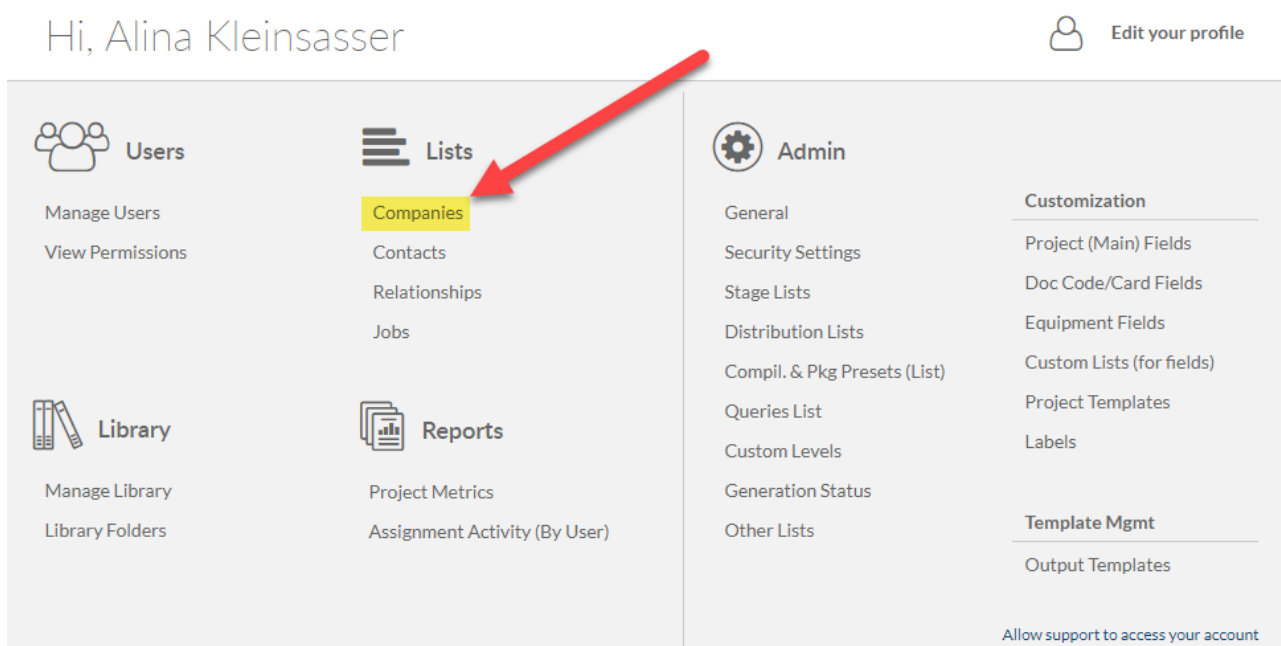

Affiliate admin settings

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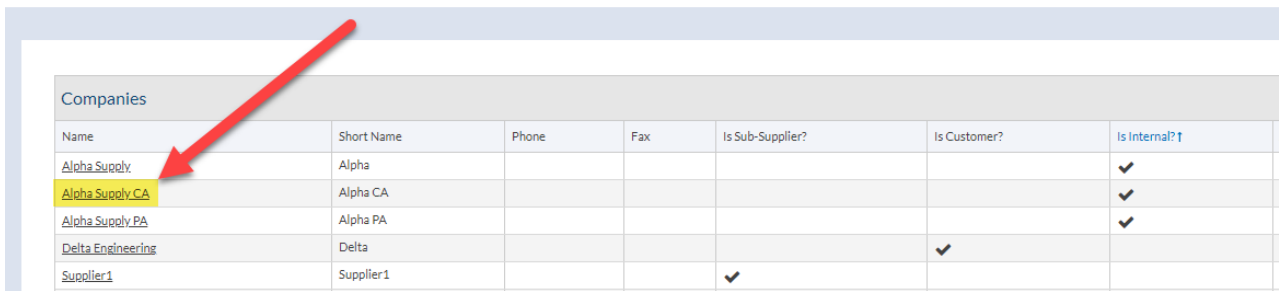
Navigation
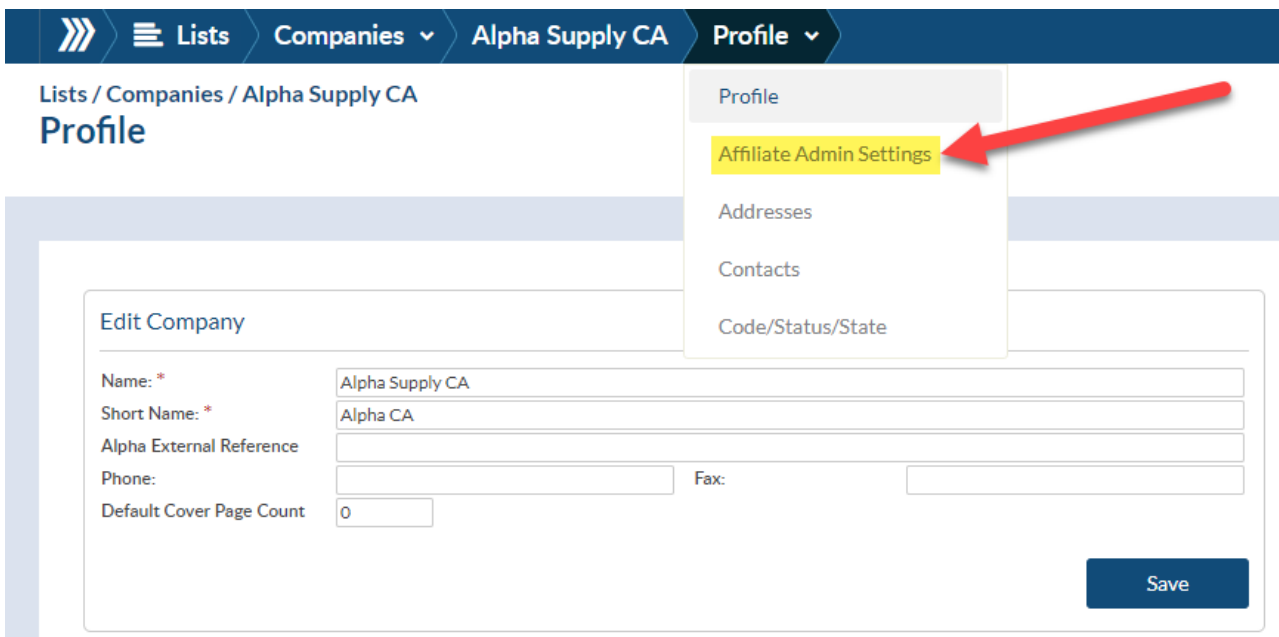
1. From the system menu, select **Lists > Companies**.

2. Select the name of the appropriate affiliate.

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

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:
- Time zone
- Outbound generic email address & name
- Submittal FROM email address settings
- Submittal contact info

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.