Affiliate Companies

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Overview

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

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Companies						+
Name I	Short Name	Is Internal?	Is Customer?	Is Sub-Supplier?	Tools	
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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.

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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		
Frome		
Project Type	Order Oquote	
Affiliate	* Alpha Supply	~
Affiliate Address	* - Select Affiliate -	
Customer	* Alpha Supply Alpha Supply CA	
Customer Address	 Alpha Supply CA Alpha Supply PA 	
Project Name	*	
Project Description		
		le
Job	- 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).

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User ac	counts				1						Extended	Support: 1/ :
						_	License Dep All accessible			Reviewer 3/27	Viev 2/1	
Filter by aff	filiate Select or t	ype ahead 🚿	where us	ser relationship is Primary (Project O Library					Inactive account	ts Show	+ Add use
Colour	Name	Tools	Role 个	Receive outstanding actions report	Receive outstanding actions alert	Receive internal approv	al actions alert	Security Permission	Commercial Contact	Extended Support	Access	Primary Affilia
		🚰 🖋 🗇	admin	0	0	0		0	0	8		Alpha Supply
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The license deployment panel displays a breakdown of the used and total available licenses per each affiliate.

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	<mark>3</mark> /20	2/10
	Alpha Supply CA	<mark>0</mark> /15	0/5	0/5	0/5
Receive	Alpha Supply PA	<mark>0</mark> /5	0/2	0/2	0/1
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Extended Support: 1/1

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.

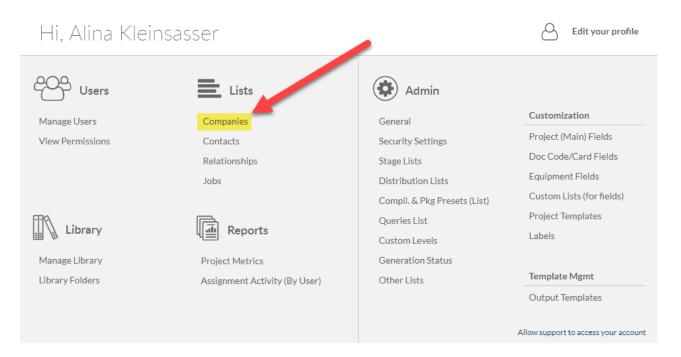
>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>>	Pro	oject Templates 👻				
Admin/Customization Project Templates	Name *	EN	Affiliate *	Wolfe Instruments	~	42

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.



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.

) 🖹 🗎 Lists 🛛 Con	npanies 👻 Alpha Supply CA	Profile ~
Lists / Companies / Alpha S	upply CA	Profile
Profile		Affiliate Admin Settings
		Addresses
		Contacts
Edit Company		Code/Status/State
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:

- 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.