

Add Company Doc Code Lists

12/15/2025 3:50 pm MST

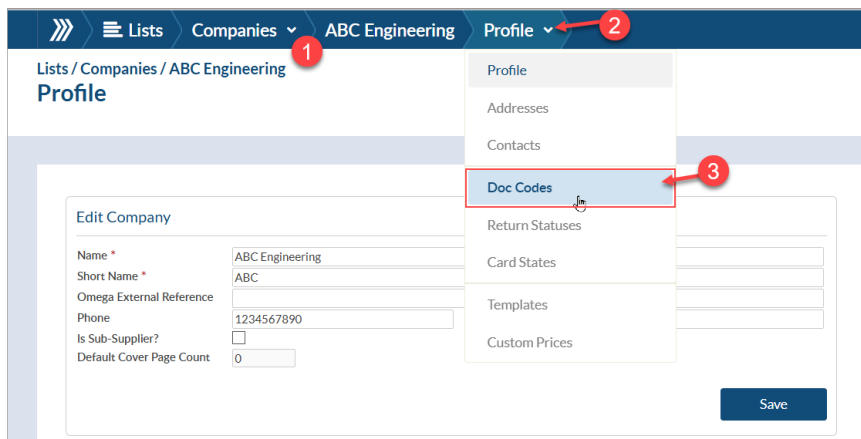
In DocBoss, a Doc Code is a specific customer code or project code used to create project document groups. The following are examples of common Doc Codes:

Document Code	Document Code Description
LST	Lists
ITP	Inspection and Test Plans
DWG	General Arrangement Drawings
CAL	Calculations
PRO	Test Procedures
IOM	Installation, Operation and Maintenance Manual
RPT	Test Reports
CER	Certificates
MDR	Manufacturing Data Record

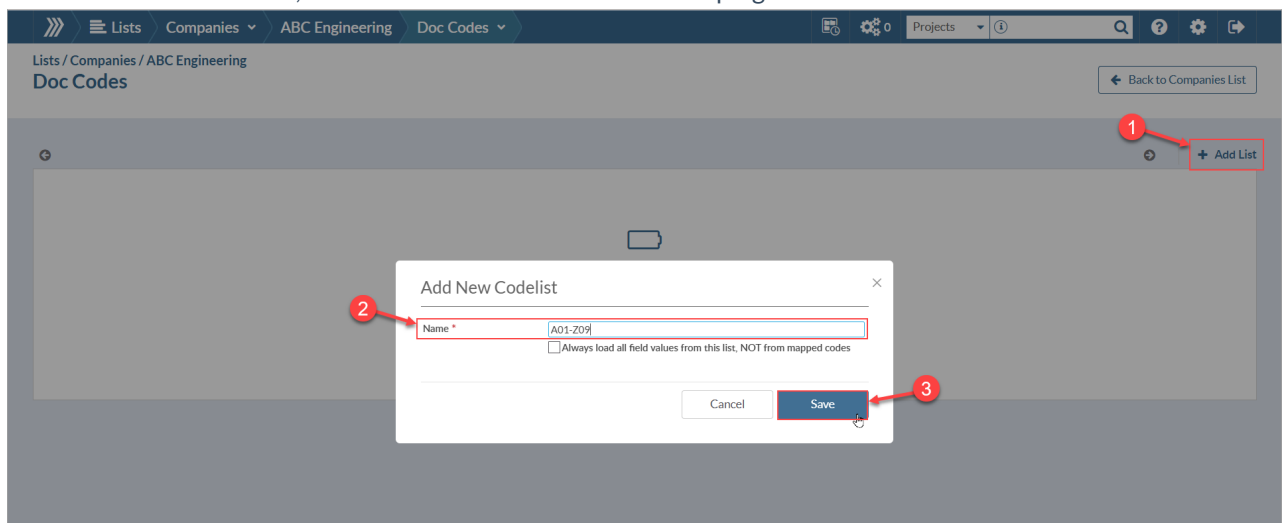
Adding Doc Codes to your customers allows you to re-use them in any of their Projects and the easiest way to automatically build the Card List (i.e., Vendor Document List) is by [configuring each Code settings](#).

Once a [Customer profile](#) is set up, Doc Code lists can be added.

To get to a customer's code list entries, hover over the "Profile" menu and select the doc codes section.



To add a new doc code list, click the "+ Add List" button in the top right.

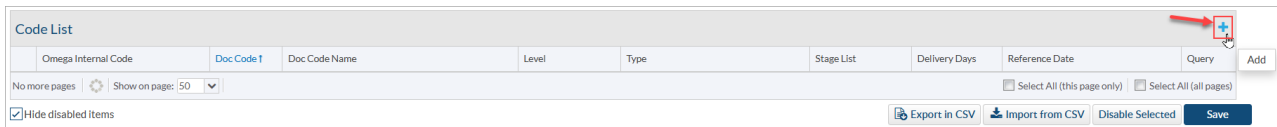


Once the code list has been created, doc codes and the descriptions can be entered either one at a time or via in

bulk (via CSV):

Individually

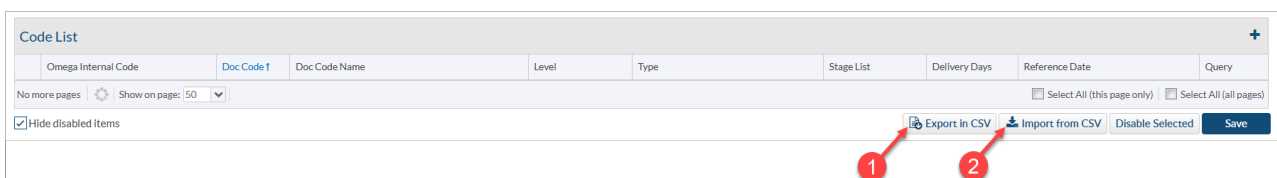
1. Click the "+" button in the top right of the grid
2. Fill in the required (*) fields (doc code and doc code name), and [configure additional settings](#) if desired
3. Click Save



The screenshot shows the top right corner of the 'Code List' interface. A red arrow points to a blue '+' button located next to the 'Add' button. Below the grid, there are buttons for 'Export in CSV', 'Import from CSV', 'Disable Selected', and 'Save'.

In Bulk (via CSV)

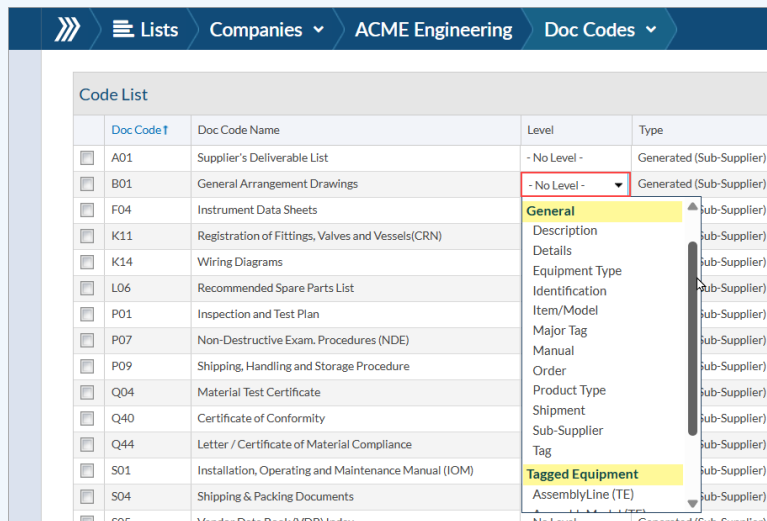
1. Click the "Export in CSV" button below the grid (bottom right)
2. Fill in the required (*) fields (doc code and doc code name), and [configure additional settings](#) if desired
3. Upload using the "Import from CSV" button below the grid (bottom right)



The screenshot shows the bottom right corner of the 'Code List' interface. Two red arrows point to the 'Export in CSV' and 'Import from CSV' buttons. The 'Export in CSV' button is labeled with a red '1' and the 'Import from CSV' button is labeled with a red '2'.



If configuring the doc code level on the company doc code list, it is recommended that **default fields** (e.g., Item/Model, Tag, Sub-Supplier, etc.) are set to an option in the "Tagged Equipment" section, and **custom fields** are set to an option in the "General" section. This is to ensure that the pre-selected levels are correctly applied once the codes are added to a project.



The screenshot shows the 'Code List' interface with a table of doc codes. The 'Level' column has a dropdown menu open, showing options like 'General', 'Tagged Equipment', and 'AssemblyLine (TE)'. The 'Doc Code' column is highlighted in blue.

Doc Code	Doc Code Name	Level	Type
A01	Supplier's Deliverable List	- No Level -	Generated (Sub-Supplier)
B01	General Arrangement Drawings	- No Level -	Generated (Sub-Supplier)
F04	Instrument Data Sheets	General	Sub-Supplier
K11	Registration of Fittings, Valves and Vessels(CRN)	Description	Sub-Supplier
K14	Wiring Diagrams	Details	Sub-Supplier
L06	Recommended Spare Parts List	Equipment Type	Sub-Supplier
P01	Inspection and Test Plan	Identification	Sub-Supplier
P01	Inspection and Test Plan	Item/Model	Sub-Supplier
P07	Non-Destructive Exam. Procedures (NDE)	Major Tag	Sub-Supplier
P09	Shipping, Handling and Storage Procedure	Manual	Sub-Supplier
Q04	Material Test Certificate	Order	Sub-Supplier
Q40	Certificate of Conformity	Product Type	Sub-Supplier
Q44	Letter / Certificate of Material Compliance	Shipment	Sub-Supplier
S01	Installation, Operating and Maintenance Manual (IOM)	Sub-Supplier	Sub-Supplier
S04	Shipping & Packing Documents	Tag	Sub-Supplier
S05	Vendor Data Book (VDB) Index	Tagged Equipment	Sub-Supplier
		AssemblyLine (TE)	Sub-Supplier

Next steps:

Add Doc Codes to a Project

Configure Code List (Requirements)

Learn more about Doc Codes:

Mapping customer codes to internal codes

Differences between Codes and Cards
