Add Company Doc Code Lists

12/15/2025 3:50 pm MST

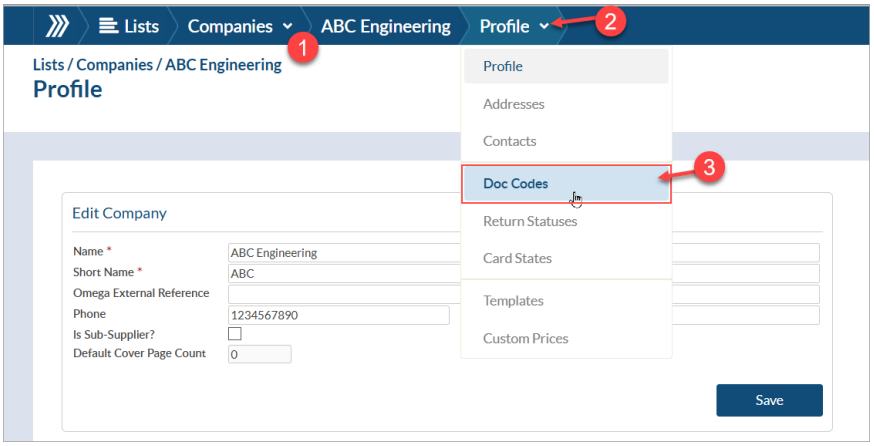
In DocBoss, a Doc Code is a specific customer code or project code used to create project document groups. The following are examples of common Doc Codes:

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

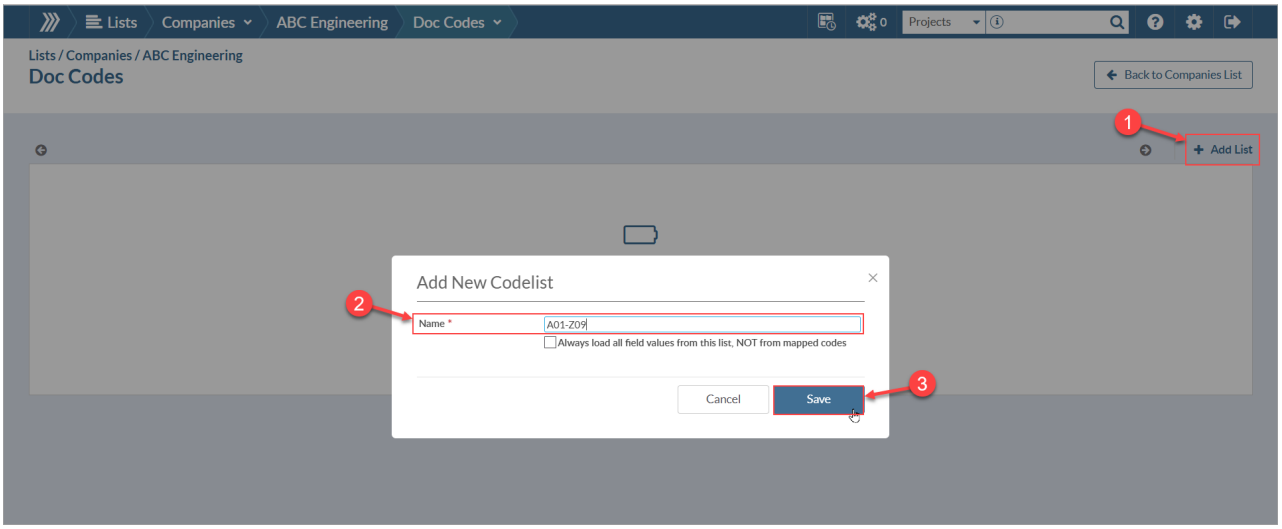
Adding Doc Codes to your customers allows you to re-use them in any of their Projects and the easiest way to automatically build the Card List (i.e., Vendor Document List) is by configuring each Code settings.

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.

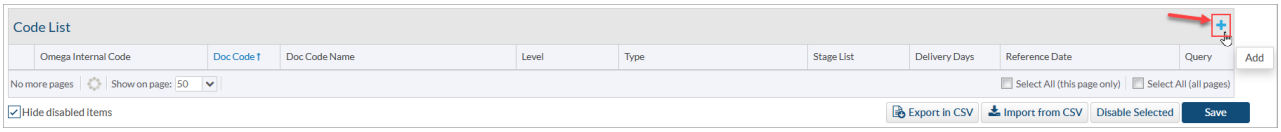


Once the code list has been created, doc codes and the descriptions can be entered either one at a time or via in

bulk (via CSV):

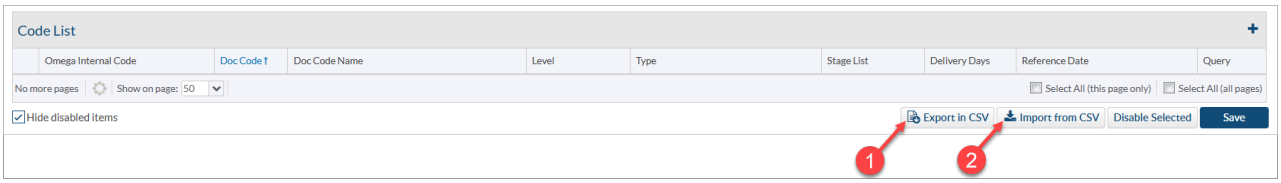
Individually

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

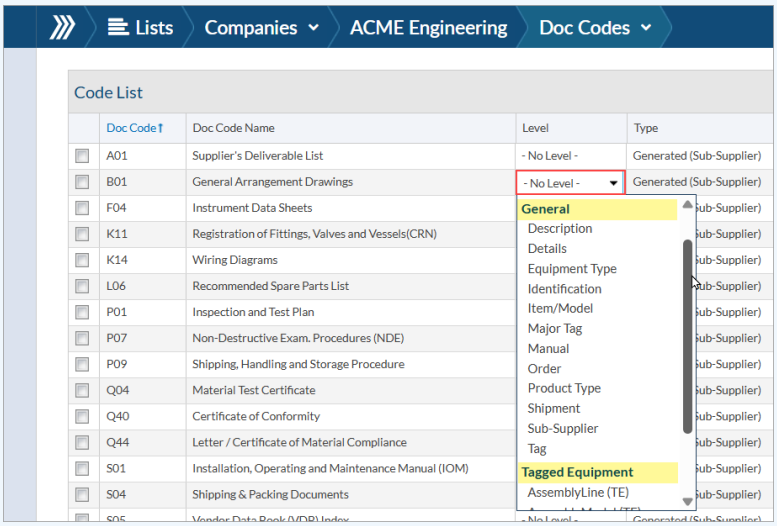


In Bulk (via CSV)

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)



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.



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