

# Add Company Doc Code Lists

12/15/2025 3:50 pm MST

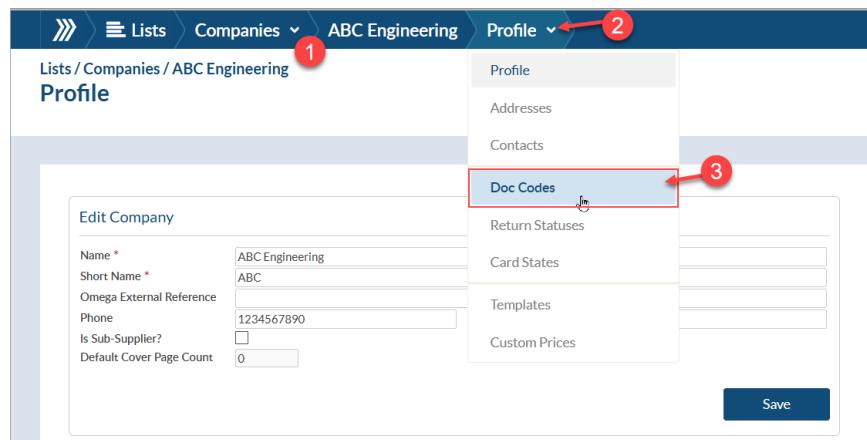
In DocBoss, a Doc Code is a specific customer code or project code used to create project document groups. The following are examples of common Doc Codes:

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](#).

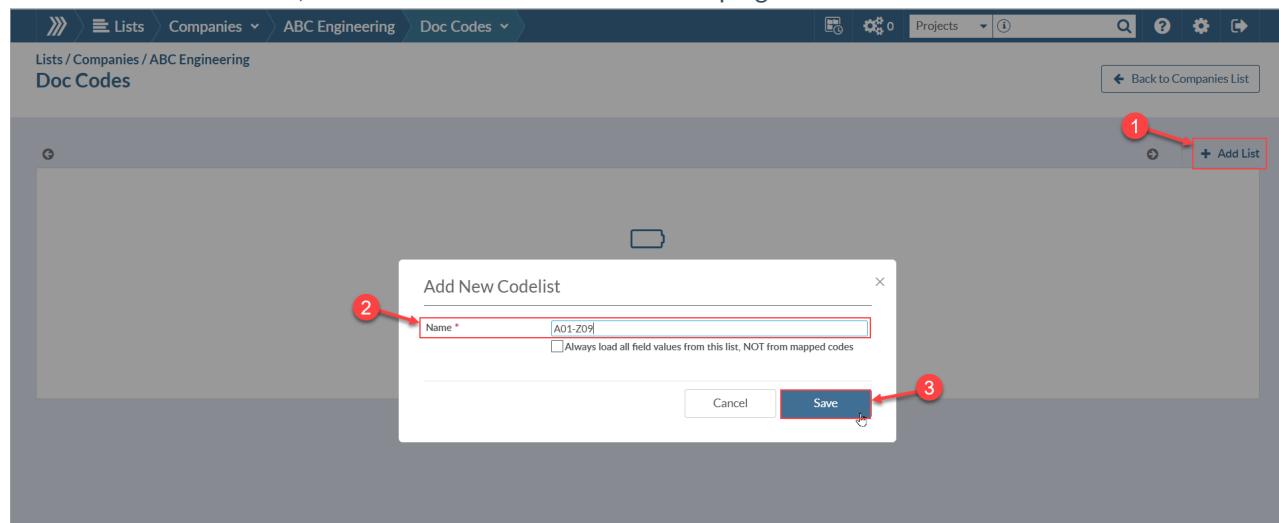
Once a [Customer profile](#) is set up, Doc Code lists can be added.

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



The screenshot shows the DocBoss navigation bar with 'ABC Engineering' selected. A dropdown menu for 'Profile' is open, showing options like 'Profile', 'Addresses', 'Contacts', 'Doc Codes', 'Return Statuses', 'Card States', 'Templates', and 'Custom Prices'. The 'Doc Codes' option is highlighted with a red box and a red arrow labeled '3'.

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



The screenshot shows the 'Doc Codes' list for 'ABC Engineering'. A modal window titled 'Add New Codelist' is open, showing a 'Name' input field with 'A01-Z09' and a 'Save' button. A red box and arrow labeled '1' points to the '+ Add List' button in the top right of the main list area. A red box and arrow labeled '2' points to the 'Name' input field. A red box and arrow labeled '3' points to the 'Save' button.

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

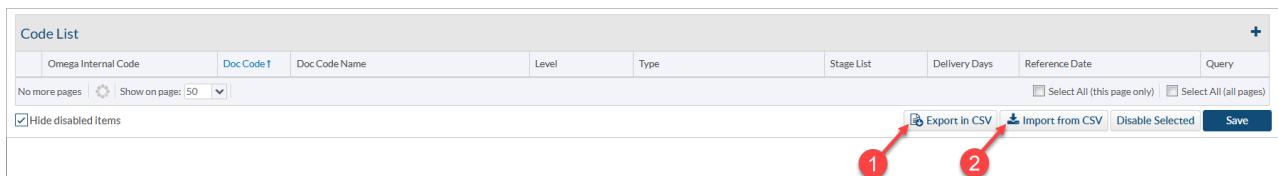
1. Click the "+" button in the top right of the grid
2. Fill in the required (\*) fields (doc code and doc code name), and [configure additional settings](#) if desired
3. Click Save



A screenshot of the 'Code List' grid interface. The top right corner features a blue '+' button with a white outline, which is highlighted with a red box. The grid columns include 'Omega Internal Code', 'Doc Code 1', 'Doc Code Name', 'Level', 'Type', 'Stage List', 'Delivery Days', 'Reference Date', 'Query', and 'Add'. At the bottom of the grid, there are buttons for 'Export in CSV', 'Import from CSV', 'Disable Selected', and 'Save'. A red arrow points to the 'Add' button.

### In Bulk (via CSV)

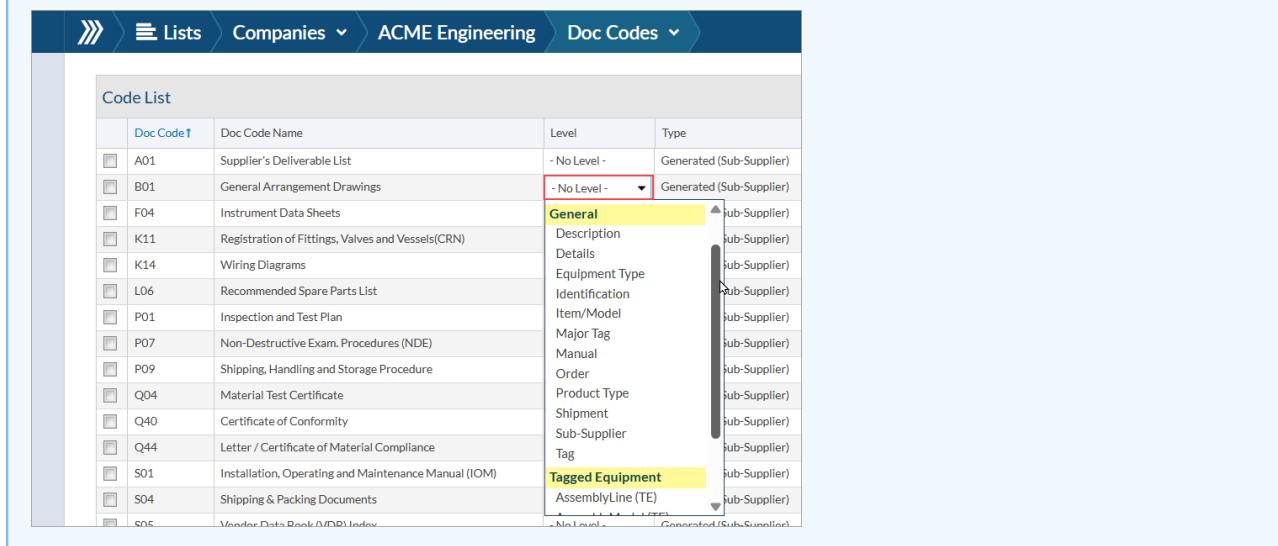
1. Click the "Export in CSV" button below the grid (bottom right)
2. Fill in the required (\*) fields (doc code and doc code name), and [configure additional settings](#) if desired
3. Upload using the "Import from CSV" button below the grid (bottom right)



A screenshot of the 'Code List' grid interface, similar to the previous one but with different button positions. The 'Export in CSV' button (1) and 'Import from CSV' button (2) are highlighted with red circles. The rest of the interface is identical to the first screenshot.



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.



A screenshot of the 'Code List' grid interface. A dropdown menu is open over the 'Level' column for the second row. The menu is divided into two sections: 'General' (highlighted in yellow) and 'Tagged Equipment' (highlighted in yellow). Both sections list various options like 'Description', 'Details', 'Equipment Type', etc., each followed by '(Sub-Supplier)'. The 'General' section includes 'No Level' and 'Generated (Sub-Supplier)'. The 'Tagged Equipment' section includes 'Assembly Line (TE)' and 'Generated (Sub-Supplier)'. The rest of the grid shows rows with doc codes A01, B01, F04, K11, K14, L06, P01, P07, P09, Q04, Q40, Q44, S01, S04, and S05, along with their descriptions and levels.

## 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

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