

Add Company Doc Code Lists

04/08/2026 4:24 pm MDT

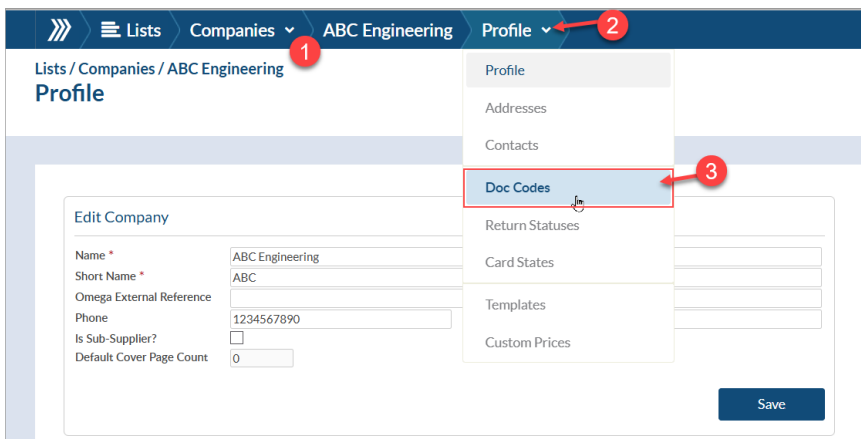
In DocBoss, a Doc Code is a specific customer code or project code used to create project document groups. The following are examples of common Doc Codes:

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

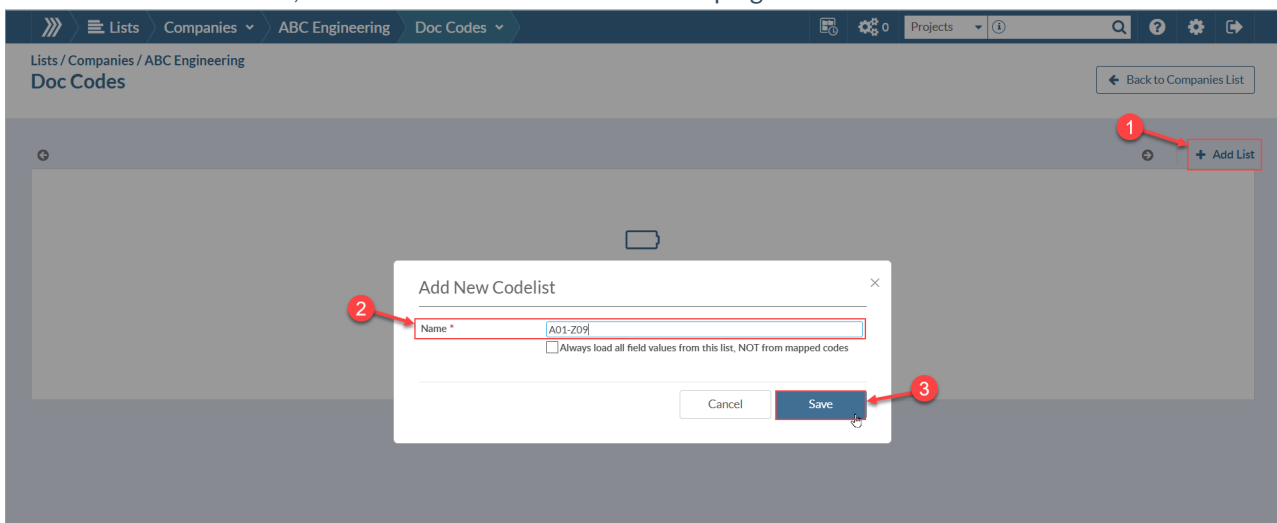
Adding Doc Codes to your customers allows you to re-use them in any of their Projects and the easiest way to automatically build the Card List (i.e., Vendor Document List) is by [configuring each Code settings](#).

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.

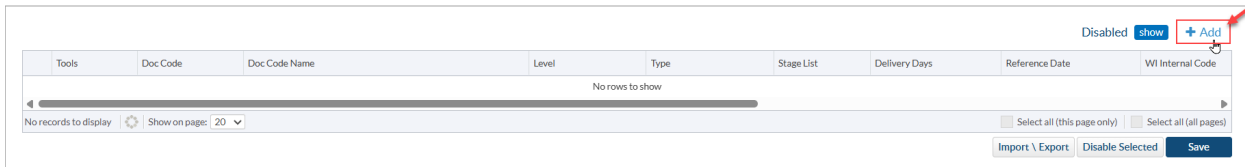


Once the code list has been created, doc codes and the descriptions can be entered either one at a time or via in

bulk (via CSV):

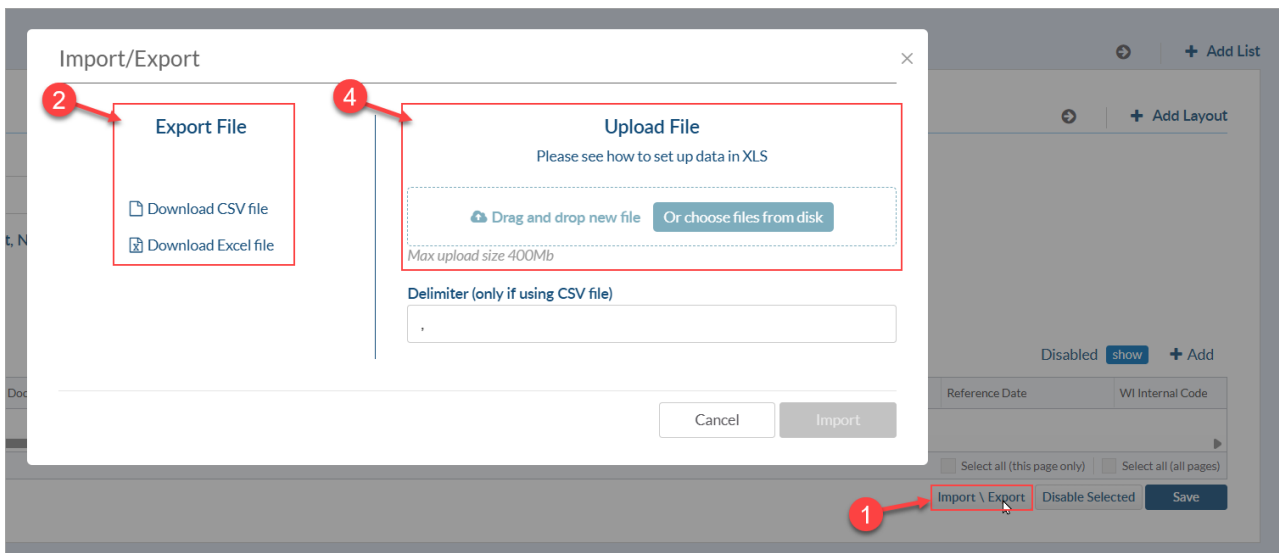
Individually

1. Click the "+ Add" 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

1. Click the "Import/Export" button below the grid (bottom right)
2. Download the export file (CSV or Excel) from the pop-up
3. Fill in the required (*) fields (doc code and doc code name), and [configure additional settings](#) if desired
4. Upload the file from the same "Import/Export" pop-up



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.

Doc Code T	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
P07	Non-Destructive Exam. Procedures (NDE)	Item/Model	Sub-Supplier
P09	Shipping, Handling and Storage Procedure	Major Tag	Sub-Supplier
Q04	Material Test Certificate	Manual	Sub-Supplier
Q40	Certificate of Conformity	Order	Sub-Supplier
Q44	Letter / Certificate of Material Compliance	Product Type	Sub-Supplier
S01	Installation, Operating and Maintenance Manual (IOM)	Shipment	Sub-Supplier
S04	Shipping & Packing Documents	Sub-Supplier	Sub-Supplier
		Tag	Sub-Supplier
		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