Add Company Doc Code Lists

09/28/2026 8:37 am MDT

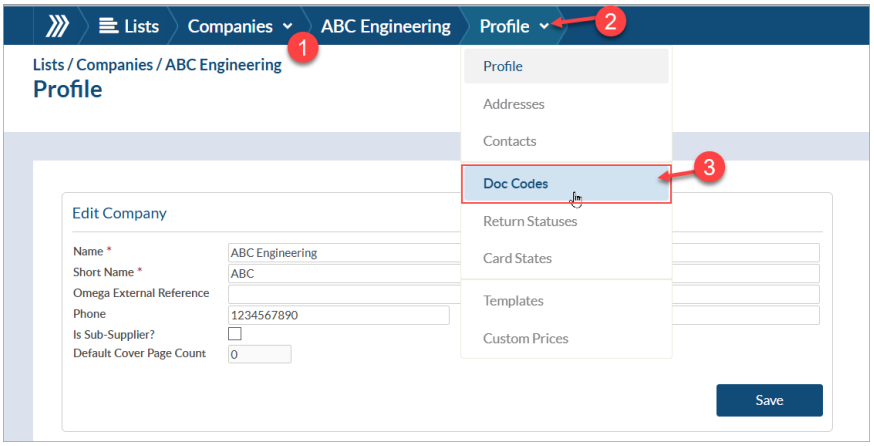
In DocBoss, a Doc Code is a specific customer code or project code used to create project document groups. The following are examples of common Doc Codes:

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

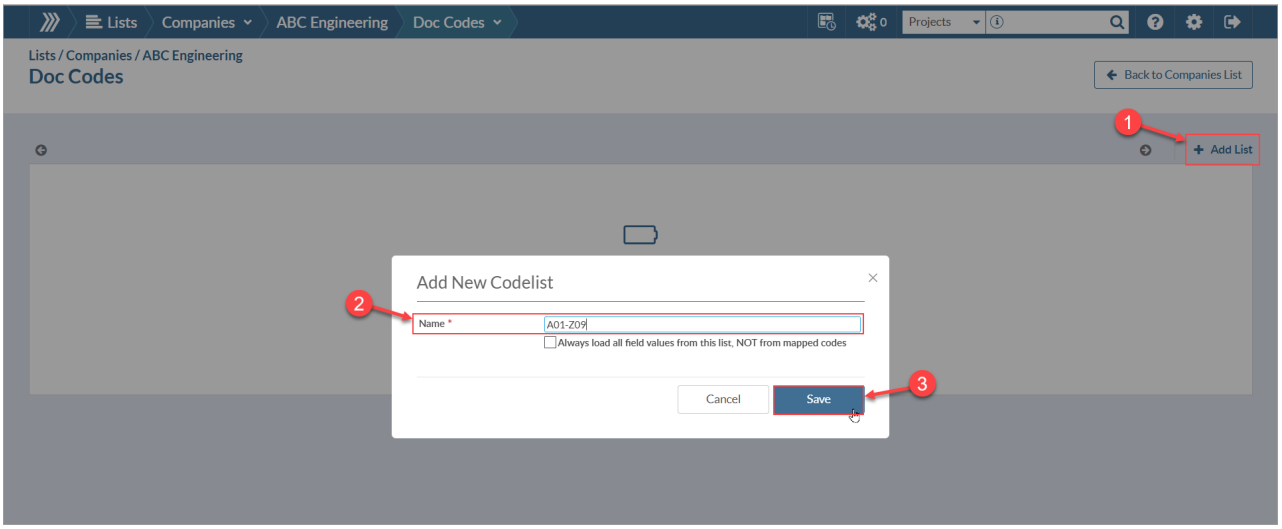
Adding Doc Codes to your customers allows you to re-use them in any of their Projects and the easiest way to automatically build the Card List (i.e., Vendor Document List) is by configuring each Code settings.

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.



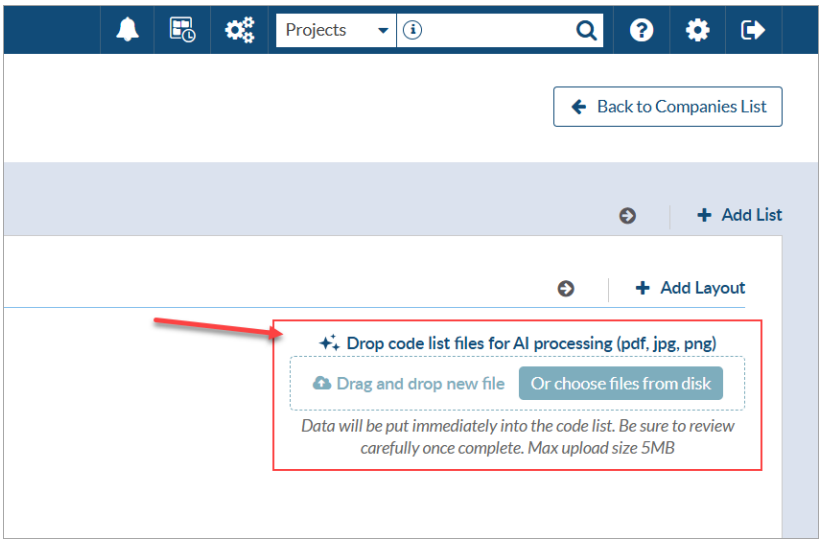
Once the code list has been created, doc codes can be entered using our AI helper, or can be entered manually (one

at a time or via in bulk (via CSV):

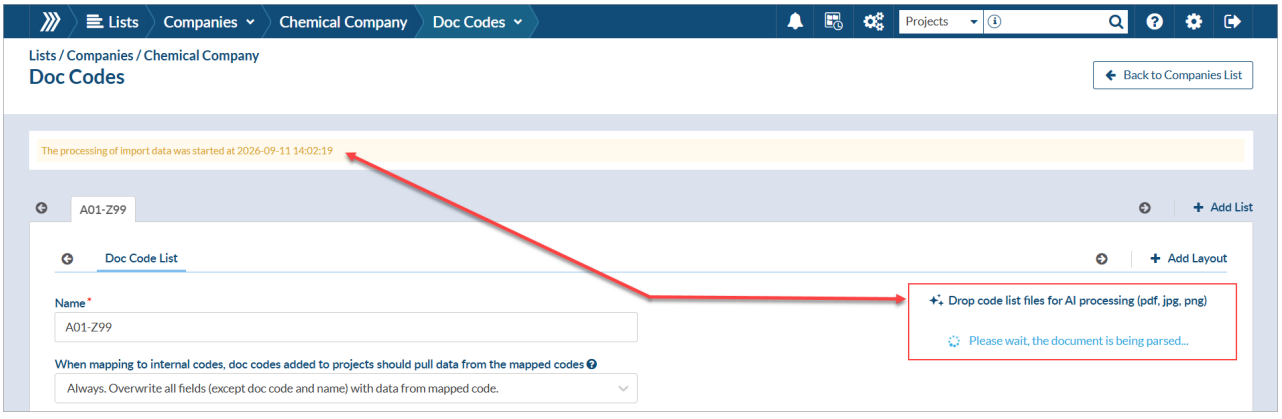
AI upload

Remove the manual step of retyping or reformatting the customer's document requirements table (SDRL, VDRL, etc) and have DocBoss extract the doc codes from the table directly.

To use this feature, simply upload the file you received from your customer. There is no need to convert it or copy it into a template first.



Once the file is uploaded, DocBoss will read and extract the **doc code** and the **doc code name** for each requirement. Other details (issue purposes, delivery-related details, etc.) can be configured after import.



Once the import is complete, be sure to review the data to ensure accuracy. If modifications are required, you can:

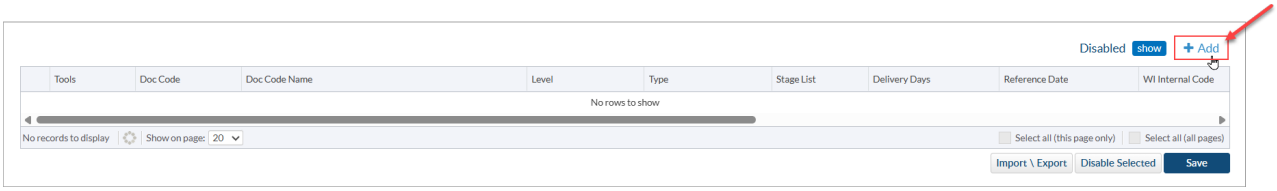
- **Edit** directly in the grid
- **Delete** any unrequired rows
- **Export to CSV/Excel** to make bulk changes, and import the edited file back in

Manual upload

Individually

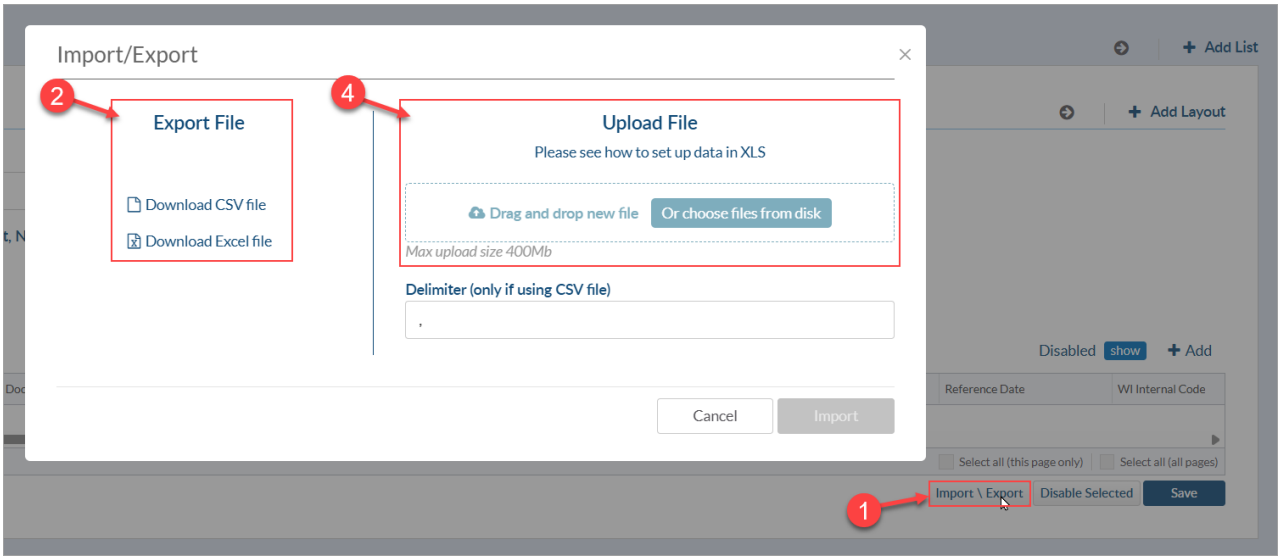
1. Click the "+ Add" button in the top right of the grid
2. Fill in the required (*) fields (doc code and doc code name), and configure additional settings if desired

3. Click Save

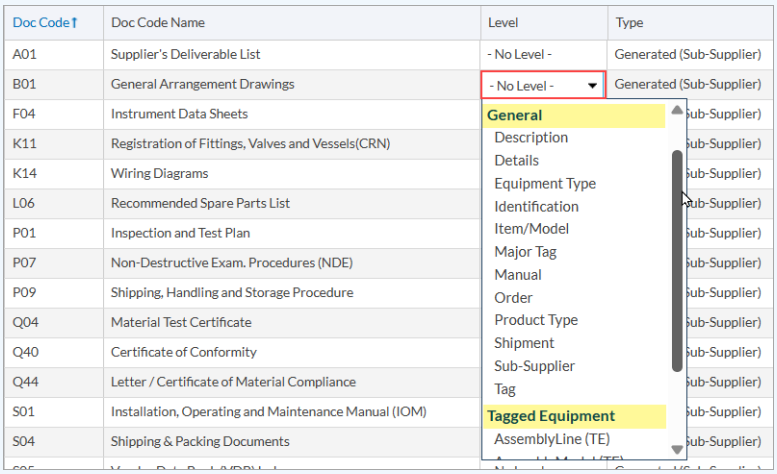


In Bulk

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.



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