

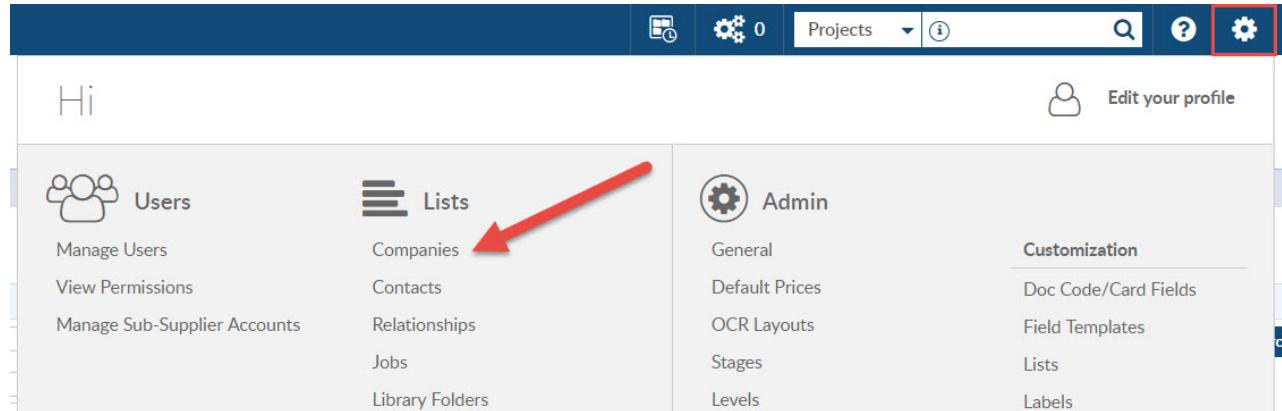
Adding a New Company

01/02/2026 4:49 pm MST

A **Company** in DocBoss is a generic corporate entity. The following are examples of **Companies**:

- Customer (company to whom you submit your documents or an EndUser)
- Sub-Supplier (company which supplies documents)

Settings > (Lists)Companies

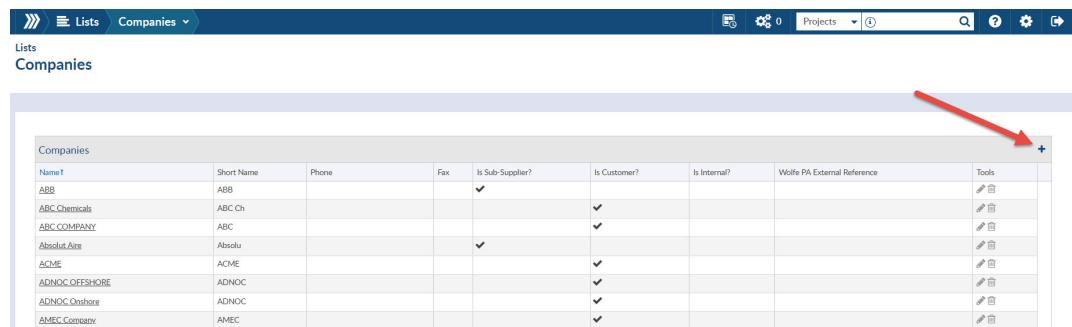


The screenshot shows the DocBoss application interface. At the top, there is a dark blue header bar with various icons and a search bar. Below the header, the main content area is titled 'Lists' with a sub-section 'Companies'. A red arrow points to the 'Companies' link. To the left of the 'Companies' link are 'Manage Users', 'View Permissions', and 'Manage Sub-Supplier Accounts'. To the right are 'General', 'Default Prices', 'OCR Layouts', 'Stages', and 'Levels'. On the far right, there is a 'Customization' section with 'Doc Code/Card Fields', 'Field Templates', 'Lists', and 'Labels'. At the bottom of the content area, there is a 'Hi' greeting and a 'Edit your profile' link.

You will see the Companies grid, this grid displays all companies that are set up in your instance.

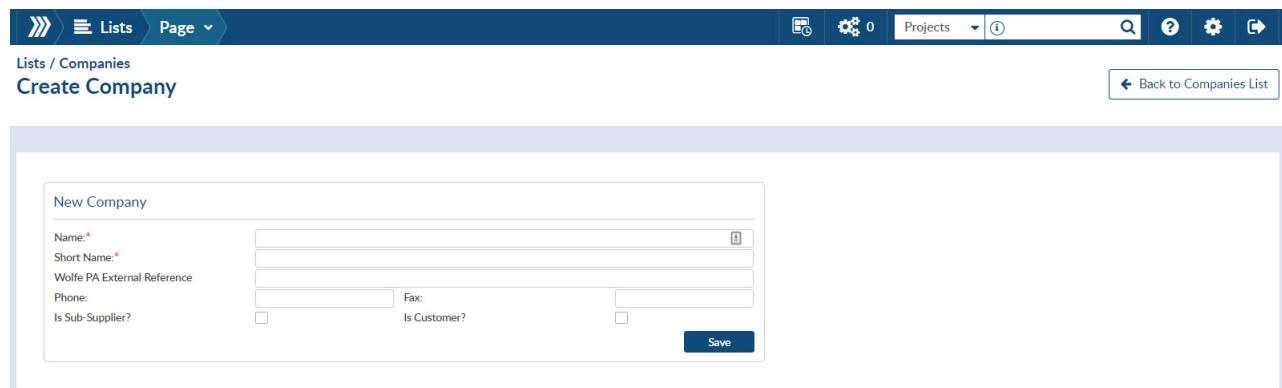
Step 1 Click Add icon in top right-hand corner of grid

- Click "+" in the top right to add a new company



The screenshot shows the 'Companies' grid. The grid header has a '+' icon in the top right corner, which is highlighted with a red arrow. The grid itself displays a list of companies with columns for Name, Short Name, Phone, Fax, Is Sub-Supplier?, Is Customer?, Is Internal?, and Wolfe PA External Reference. Each row has a 'Tools' column with edit icons.

- You will be directed to the following page



The screenshot shows the 'Create Company' form. The form is titled 'New Company' and contains fields for 'Name*', 'Short Name*', 'Wolfe PA External Reference', 'Phone', 'Is Sub-Supplier?', 'Fax', and 'Is Customer?'. There is a 'Save' button at the bottom right of the form.

Step 2 Add applicable detail

Name: The Company's name

Short Name: This will default to the first 6 characters of your company's name but you can modify it to any value up

to 16 characters.. This will be used in field names, and some compressed areas of cover pages.

– For example: Canadian Natural Resources Ltd. Short Name = CNRL

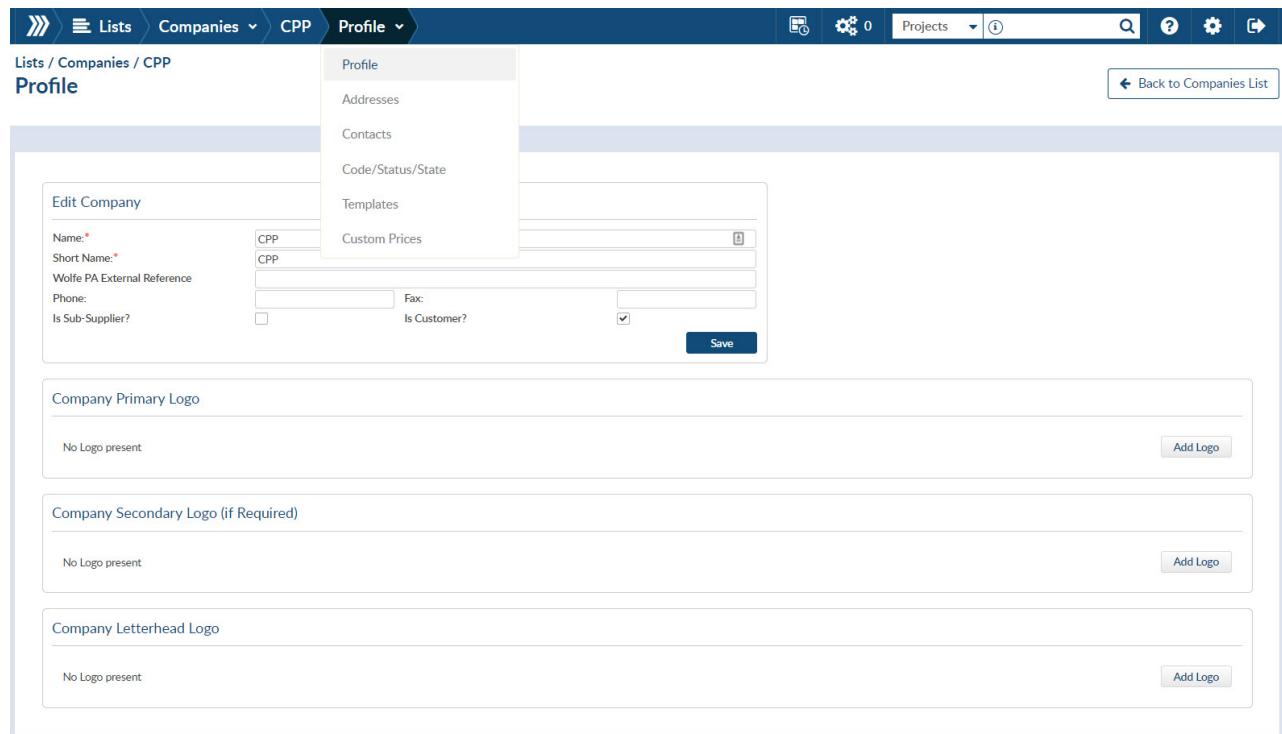
Phone and Fax are optional.

Is Sub-Supplier: This is critical if this company is a sub-supplier. (This enables you to select this company in the sub-supplier field of the order detail.)

Is Customer: You will select customer if it is a company you are submitting the documents to.

It can be set at both **Customer** and **Sub-Supplier**

Once you click save you are then directed into the Company profile. As long as you remain in that company profile all of the tabs (Profile, Addresses, Contacts, Lists, Templates & Formats, and Custom Prices) are specific to that company.



Lists / Companies / CPP
Profile

Edit Company

Name*: Short Name*: Wolfe PA External Reference Phone: Is Sub-Supplier? CPP CPP

Fax: Is Customer?

Save

Company Primary Logo
No Logo present Add Logo

Company Secondary Logo (if Required)
No Logo present Add Logo

Company Letterhead Logo
No Logo present Add Logo

At the bottom of the screen, you can add Logo's for the company you are setting up. These logos can be used on output documents like cover pages, transmittal's and/or a system generated index. Note: if you are going to include the customer's logos on your cover page, this is the place you should upload them.

For more details about adding customers have a look at our video: [Add Customer to DocBoss](#).

Next Steps

- [Adding Addresses](#)
- [Adding Contacts](#)
- [Adding Document Code Lists and Layouts](#)
- [Adding Status Lists](#)