

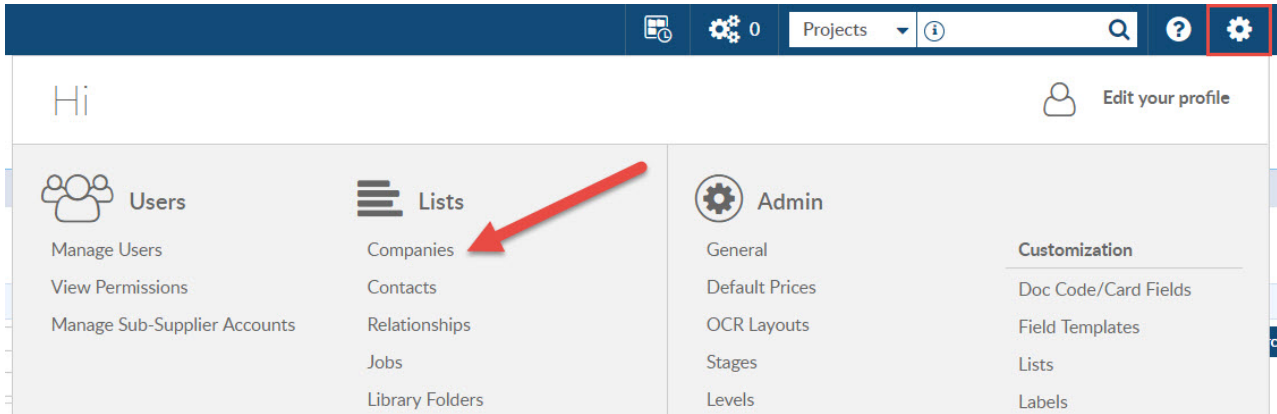
Adding a New Company

08/01/2024 1:31 pm MDT

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

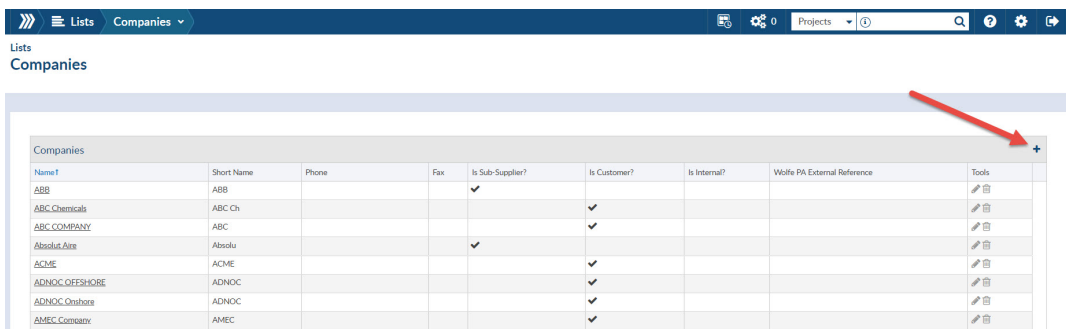


The screenshot shows the DocBoss settings interface. At the top, there is a navigation bar with 'Projects' and a search icon. Below this, the user is greeted with 'Hi' and an 'Edit your profile' link. The main menu is divided into three sections: 'Users', 'Lists', and 'Admin'. The 'Lists' section is highlighted with a red arrow pointing to the 'Companies' option. Other options in the 'Lists' section include 'Contacts', 'Relationships', 'Jobs', and 'Library Folders'. The 'Admin' section includes 'General', 'Default Prices', 'OCR Layouts', 'Stages', and 'Levels'. The 'Customization' section includes 'Doc Code/Card Fields', 'Field Templates', 'Lists', and 'Labels'.

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

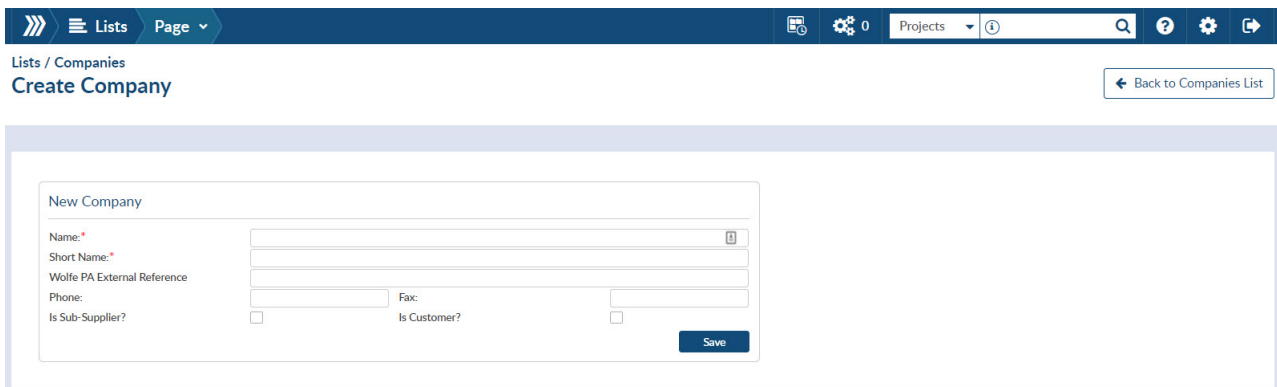
- Click “+” in the top right to add a new company



The screenshot shows the 'Companies' grid in DocBoss. The grid has columns for Name, Short Name, Phone, Fax, Is Sub-Supplier?, Is Customer?, Is Internal?, Wolfe PA External Reference, and Tools. A red arrow points to the '+' icon in the top right corner of the grid, indicating where to click to add a new company.

Name	Short Name	Phone	Fax	Is Sub-Supplier?	Is Customer?	Is Internal?	Wolfe PA External Reference	Tools
ABB	ABB			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
ABC Chemicals	ABC Ch			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
ABC COMPANY	ABC			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
Absolut Aize	Absolu			<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
ACME	ACME			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
ADNOC OFFSHORE	ADNOC			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
ADNOC Onshore	ADNOC			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		
AMEC Company	AMEC			<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>		

- You will be directed to the following page



The screenshot shows the 'Create Company' form in DocBoss. The form has fields for Name, Short Name, Wolfe PA External Reference, Phone, Fax, Is Sub-Supplier?, and Is Customer?. A 'Save' button is located at the bottom right of the form.

Create Company

← Back to Companies List

New Company

Name:

Short Name:

Wolfe PA External Reference:

Phone: Fax:

Is Sub-Supplier? Is Customer?

Save

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 whatever

you want.. 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.

The screenshot shows the 'Edit Company' form in a software application. The form is titled 'Edit Company' and is part of the 'Profile' section for a company named 'CPP'. The form includes fields for 'Name', 'Short Name', 'Wolfe PA External Reference', 'Phone', 'Fax', 'Is Sub-Supplier?', and 'Is Customer?'. There are also sections for 'Company Primary Logo', 'Company Secondary Logo (if Required)', and 'Company Letterhead Logo', each with an 'Add Logo' button. A 'Save' button is located at the bottom right of the form. The navigation bar at the top shows 'Lists / Companies / CPP' and 'Profile'.

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](#)