Add Doc Codes to a Project

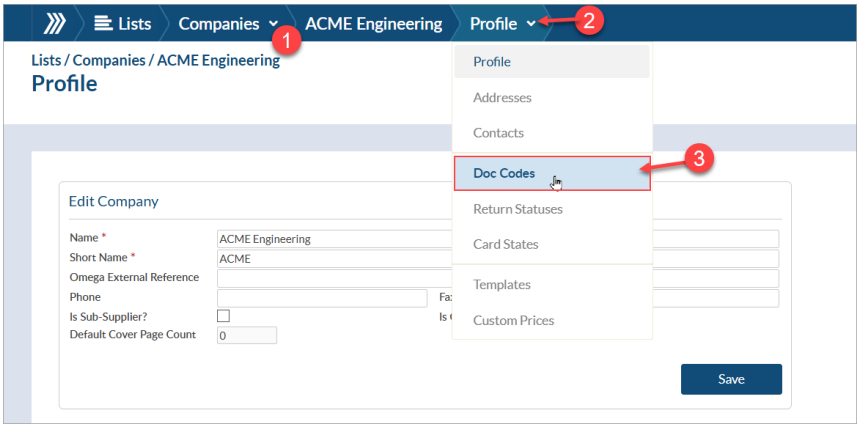
09/28/2026 8:39 am MDT

In DocBoss, the **Code List** is the list of document types/categories that will be managed on the project. This list is typically provided by the customer, but there are alternative options if this list is not provided (see article).

To add doc codes to a project, the customer's doc code list will first need to be added to their company profile. Once added, doc codes can be imported into the project.

Add Doc Codes to Company Profile

To add a new doc code list to a company profile, navigate to **System Menu > Lists > Companies.** Click on the company name in the grid, and from the company profile, open the doc codes section (**Profile > Doc Codes).**



To add a new doc code list, click the **"+ Add List"** button in the top right. Give the list a name (e.g., the first and last doc code: A01-Z09) and click save. Once created, begin adding codes either:
(a) using our AI tool, **or**
(b) manually (individually or in bulk)

Ensure all required (*) fields are filled in, and configure additional settings if desired.

> Because the company doc code list can be reused across multiple projects, it should ideally contain **all** codes provided by the customer. When doc codes are imported into the project, only the required codes (for that specific project) will be selected.

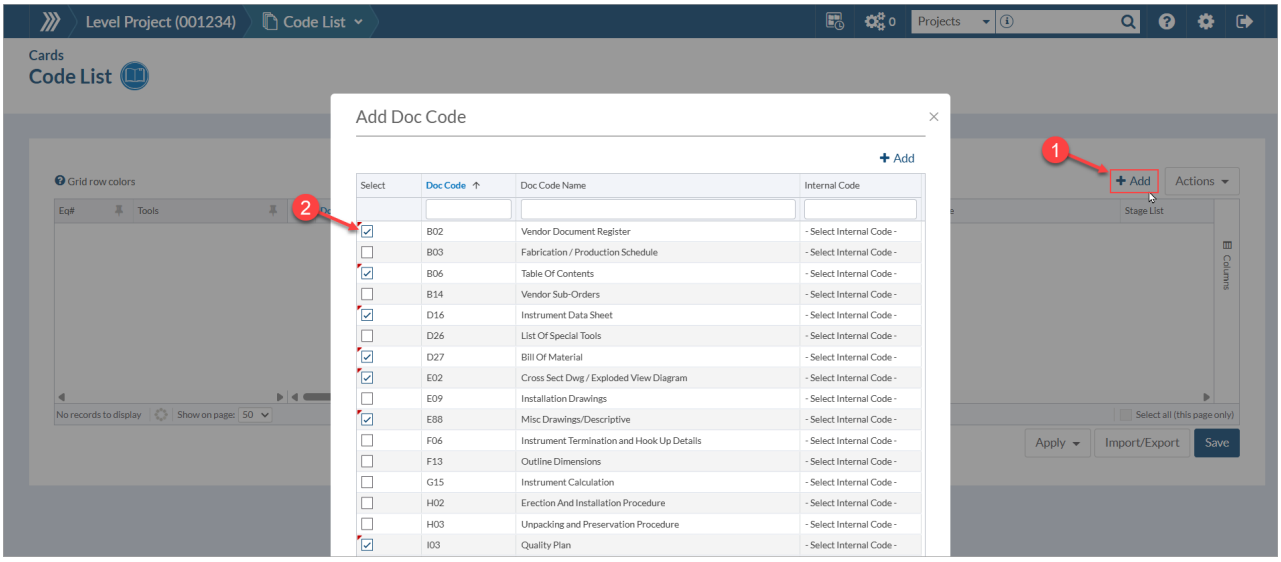
For more information, see this article: Add Company Doc Code Lists.

Add Doc Codes Into Project

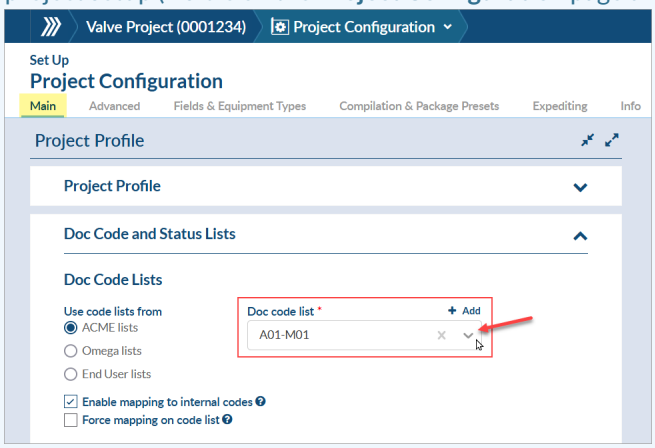
To add doc codes to a project, navigate to **Project Menu > Cards > Code List.**

Import from Company Profile

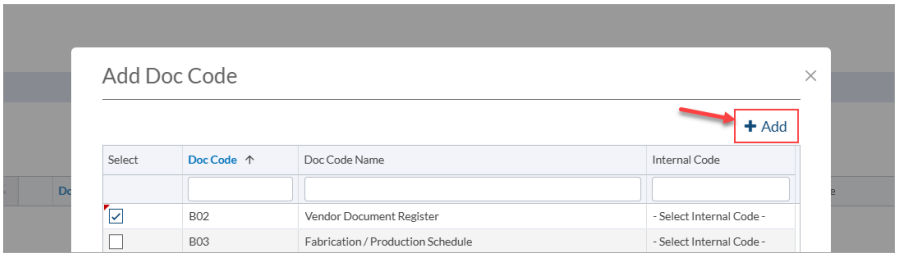
Click the **"+ Add"** button in the top right above the grid, and begin selecting the doc codes required for the project. To see all codes, set the "Show on page" value to a large number.



NOTE: The doc codes that appear in this list come from the doc code list selected during initial project setup (visible on the **Project Configuration** page under the "Main" tab).



If a required code is not listed, select the **"+ Add"** button in the top right above the grid. Adding a new code here will also add it to the company doc code list, making it available for use on other projects.

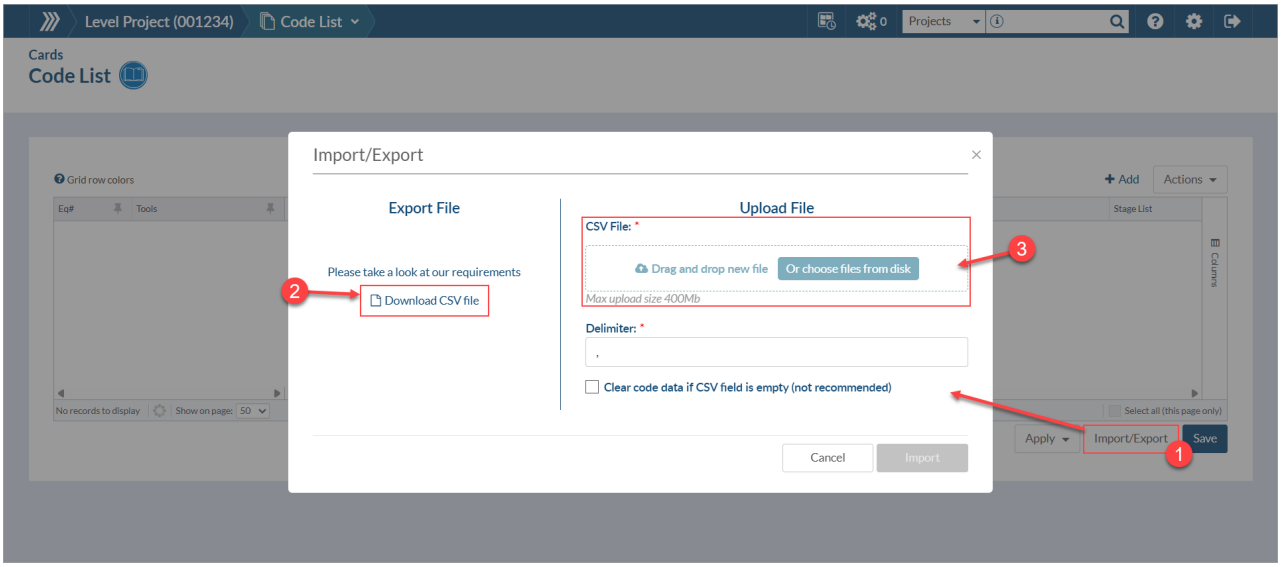


Once all applicable codes are selected, click the **"Add Selected"** button to add the selected codes to the project.

Manually Add via CSV

Doc codes can be added via CSV by clicking the**"Import/Export"** button below the grid. From the pop-up, download the CSV "template," and fill in the required fields ("Doc Code" and "Doc Code Name"). Additional settings can also be configured, if desired.

Once filled out, choose or drag the file into the "CSV File" drop box from the same pop-up and click "Import."



If a new code is added via CSV that is not included in the company doc code list selected on the project, it will also be added to the company list, making it available for use on other projects.

The **"Clear code data if CSV field is empty (not recommended)"** option will clear the custom fields (and the internal code) when the same doc code on the company doc code list has values in those fields. If left unchecked (default), the custom fields (and internal code) for the doc code will be pulled from the company doc code list.

*Note - this option does **not** clear custom checkbox fields.

Once doc codes are added to the project (either by importing or via CSV), doc codes (and their associated data) can be **edited** via CSV using the same steps.