Adding Contacts

04/25/2025 11:50 am MDT

Adding contacts to company profiles allows you to create a relationship between a contact and a company. In doing so, these contacts can be defined on projects involving the company (**Project Menu > Set Up > Project Main > Users and Key Contacts**).

Contacts defined on projects can be easily added to distribution lists (see article: Distribution Lists), and their names can auto-generated on output templates (e.g., cover page, transmittal, SDI, etc.).

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From the companies screen, select the company you wish to add a contact(s) to. Once in the company profile, navigate to **Company Menu > Contacts**.

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				Save

Add a new contact

To add a new contact, click the "+" icon above the grid. In the form, the company name will be pre-filled, and the contact will need to either be (1) created by clicking "+Add," or (2) selected from the pre-existing list of contacts (System Menu > Lists > Contacts).

To add a contact to a company profile, navigate to System Menu > Lists > Companies.

E Lists Companies ACME Engineering Contacts Lists/Companies/ACME Engineering Contacts	Add Relationship	×
	Add Relationship	Add Contact *
	Cancel Save	

By adding a contact to a company profile, a relationship is being created between the contact and the company.

If the contact already exists, they likely already have a relationship with a company in your system. DocBoss allows the same contact name to be connected to multiple customers, if required.

Once a contact is added/selected, fill in the remaining data fields (* signifies that the field is mandatory):

- 1. Email: Enter customers email address if you want the ability to select them for distribution lists (this is not mandatory)
- 2. Job Title: Enter customers job title, this will be required to be entered when creating your distribution list. It is not mandatory but avoids entering in the future.
- 3. Allow web access: Enable this field to allow the access to the Customer Web Access/Portal. See this article for more information: Enable Customer Portal Access.

Add Relationship			
Company *			
ACME Engineering			~
Contact *		+ Add	🖋 Edit
Jane Doe			~
Email			
doe.jane@acme.com			
Job title			
Document Controller			
Allow web access			
Login			
doe.jane@acme.com			
Password Must contain 10 letters, including a capital, a number, and a symbol.			
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Confirm password			
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Allow all projects access			
Projects			
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Note: Contacts can also be added to company profiles from the following pages:

1. Relationships (System Menu > Lists > Relationships)

2. Distribution Lists (System Menu > Admin > Distribution Lists)

3. Project Main (Project Menu > Set Up > Project Main > Users and Key Contacts > Customer/End User Contacts)