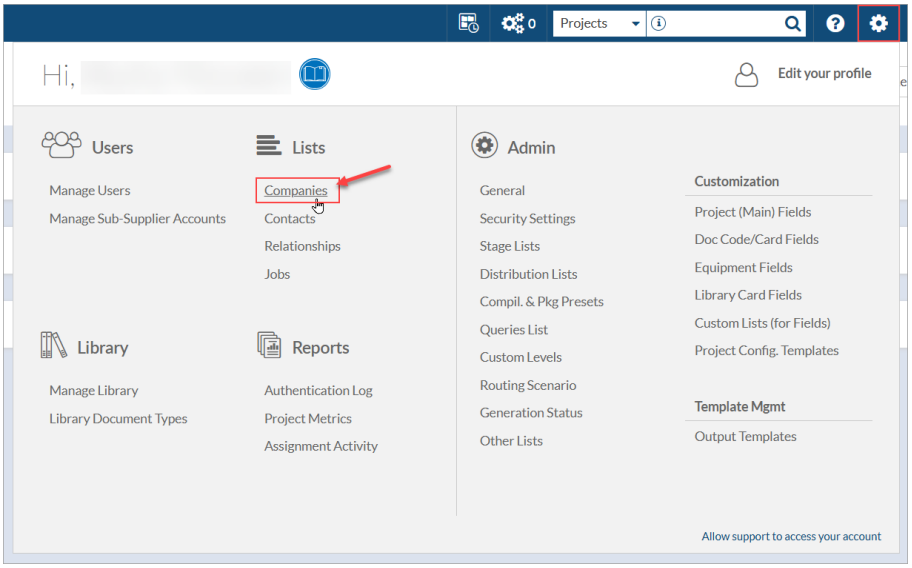
Adding Contacts

10/03/2025 12:03 pm MDT

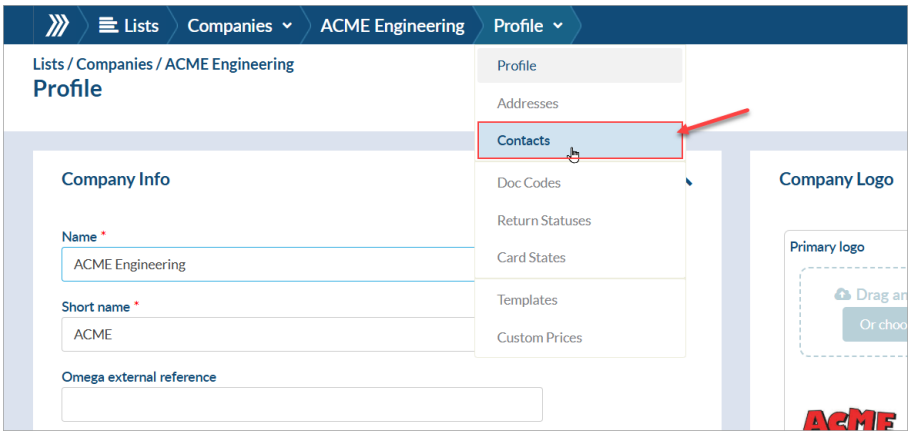
Adding contacts to company profiles allows you to create a relationship between a contact and a company. In doing so, these contacts can be defined on projects involving the company (**Project Menu > Set Up > Project Main > Users and Key Contacts**).

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.).

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

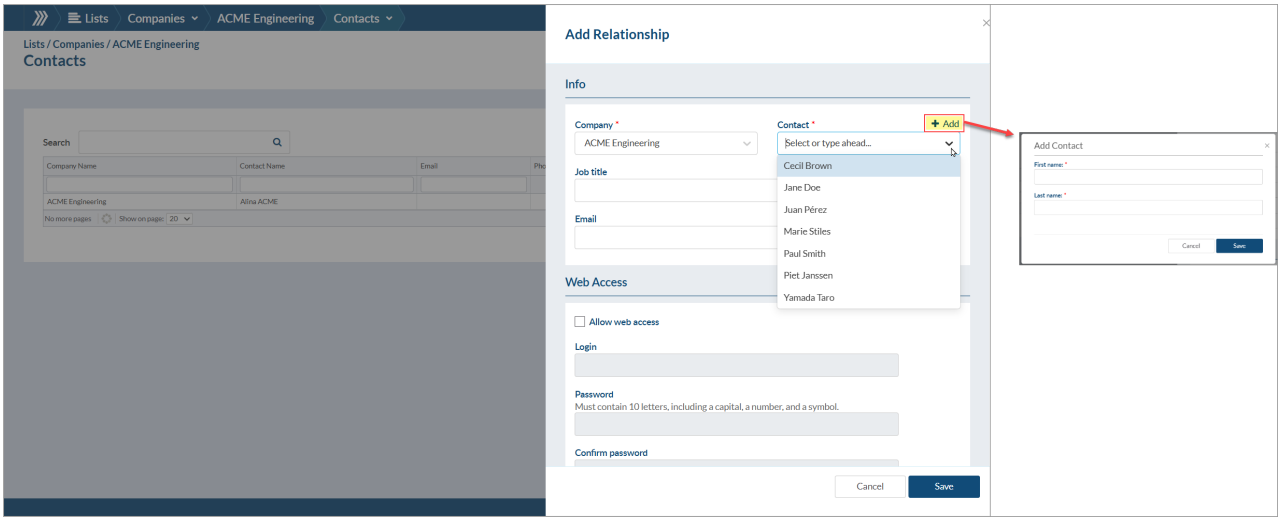


From the companies screen, select the company you wish to add a contact(s) to. Once in the company profile, navigate to **Company Menu > Contacts**.



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**).



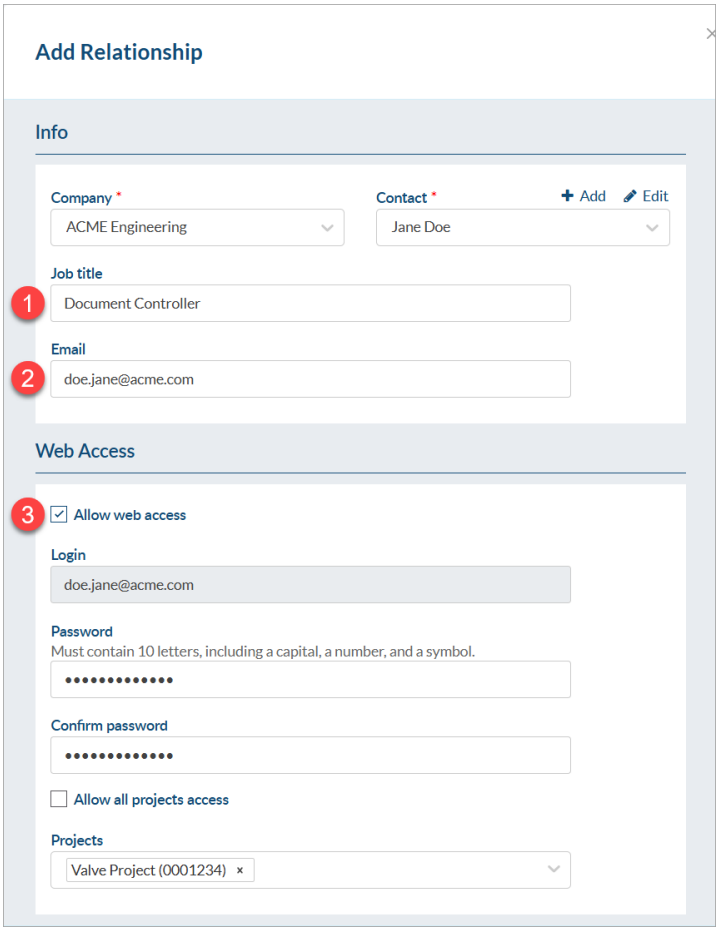
By adding a contact to a company profile, a relationship is being created between the contact and the company.
If the contact already exists, they likely already have a relationship with a company in your system. DocBoss allows the same contact name to be connected to multiple customers, if required.

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

1. **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.

2. **Email:** Enter customers email address if you want the ability to select them for distribution lists (this is not mandatory).

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.



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**)