Internal Doc Code List

09/28/2026 8:54 am MDT

The Internal Doc Code field/column allows users to map customer codes to a common set of internal codes. This provides two benefits:

1. It provides a nice way to search for similar documents, across all projects. Searching for customer codes can be difficult, as they all have different codes for each project.

2. When mapping codes, DocBoss can copy all of the default settings from your internal codes (level, delivery, etc) into the customer codes (see details below), speeding up the creation of default settings for new customer code lists.

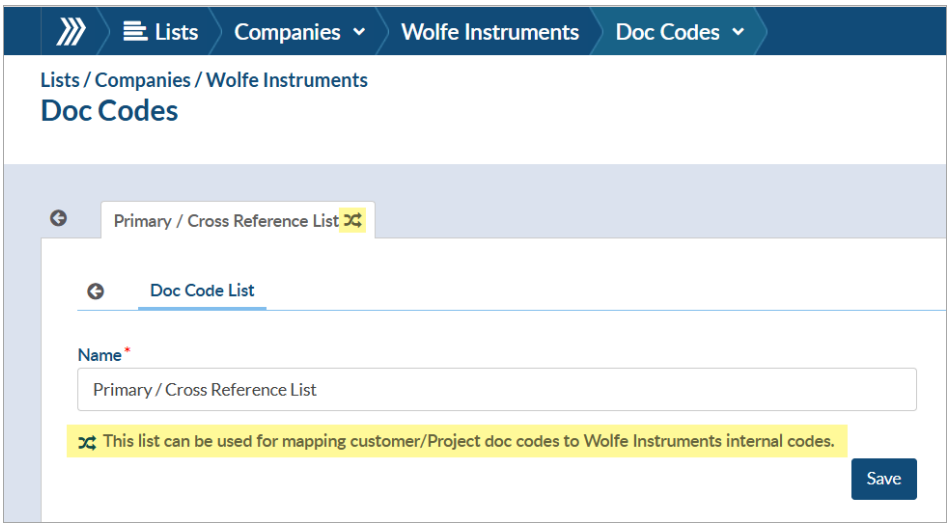
Setup Internal List for Cross Reference

If you don't have an internal set of codes, we suggest you create a few general codes to make use of this function.

A general example:

- C00 - Calculations
- D00 - Drawings
- E00 - Data Sheets
- L00 - Lists
- M00 - Manuals
- P00 - Procedures
- Q00 - Quality Reports

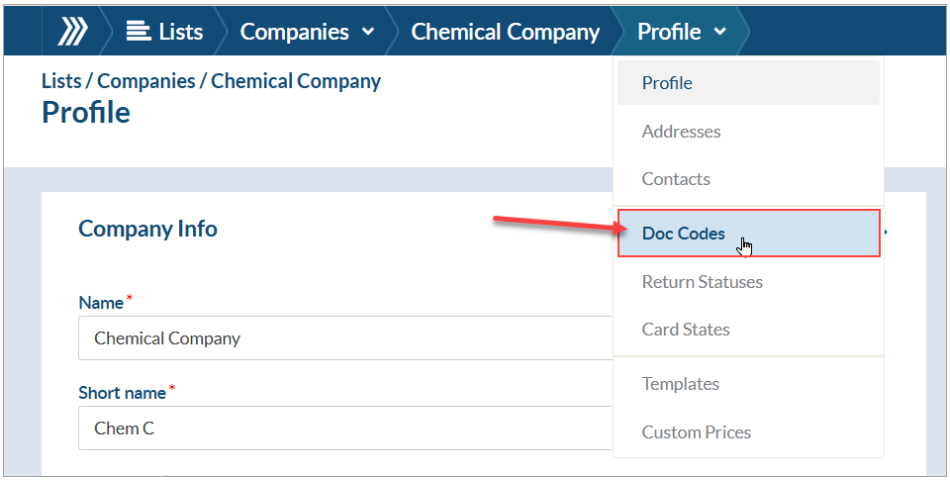
An internal code list will show a crossover icon beside the name, making it distinguishable from other code lists.



Use internal codes

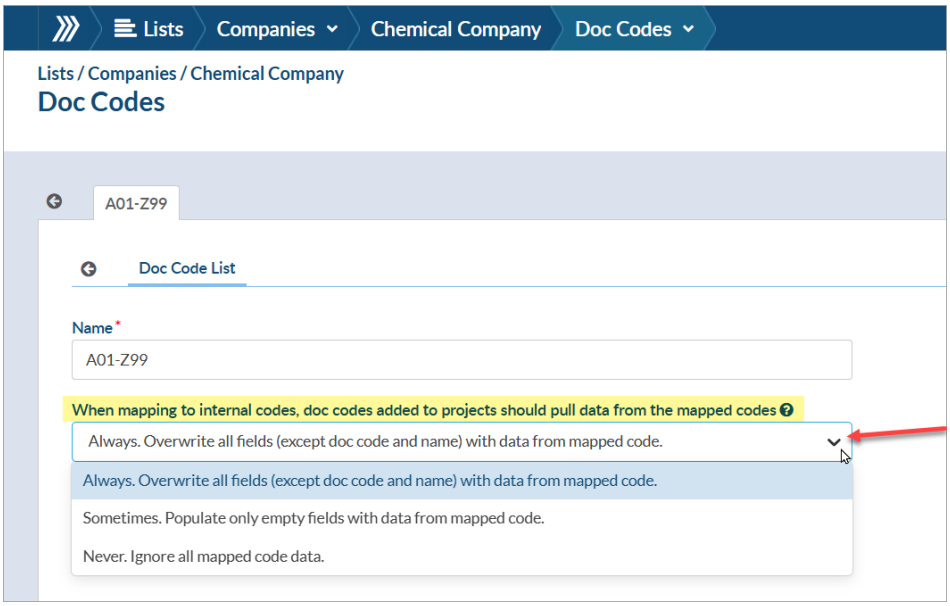
Add to company lists (customer/sub-supplier)

To begin mapping internal codes to customer codes, navigate to **System Menu > Lists > Companies**. Select the desired company, and open their doc code list.



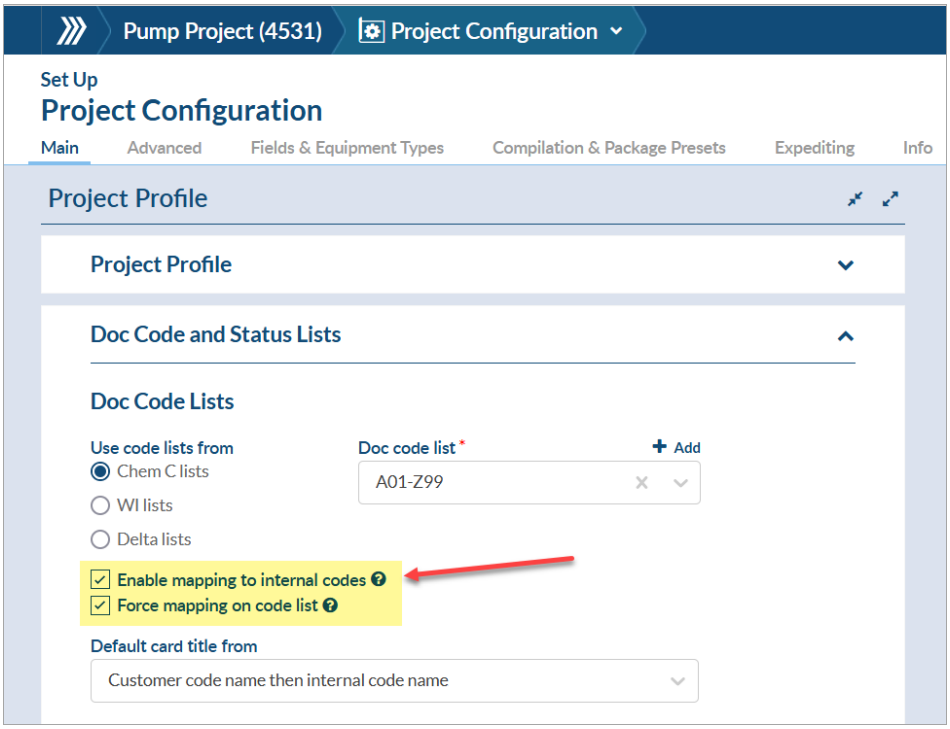
Above the list of codes, choose the desired mapping option:

- **Always** - All fields (except doc code and name) will be overwritten by data from the mapped code
- **Sometimes** - Only fields which are empty on the customer's list will be filled in by data from the mapped code
- **Never** - Field data will always be pulled from the customer's code (data from the mapped code will be ignored)



Enable on a project

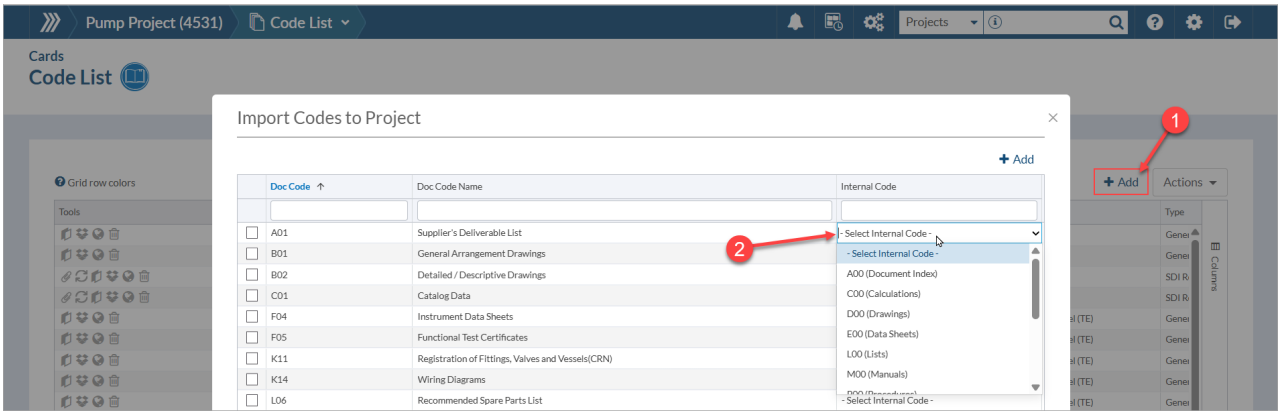
To enable mapping to internal codes on a project, navigate to **Project Menu > Project Configuration > Main**. In the **Doc Code and Status Lists** section, check the box to "Enable mapping to internal codes". If desired, internal code mapping can be made mandatory (requiring that an internal code be defined for every code added to the project).



Note: Internal mapping can be enabled on Project Configuration templates (**System Menu > Admin > Project Config. Templates**) so that the option is pre-selected on future projects.

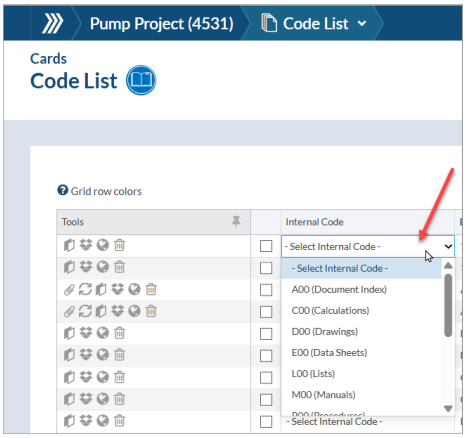
Add mapping while adding codes to a project

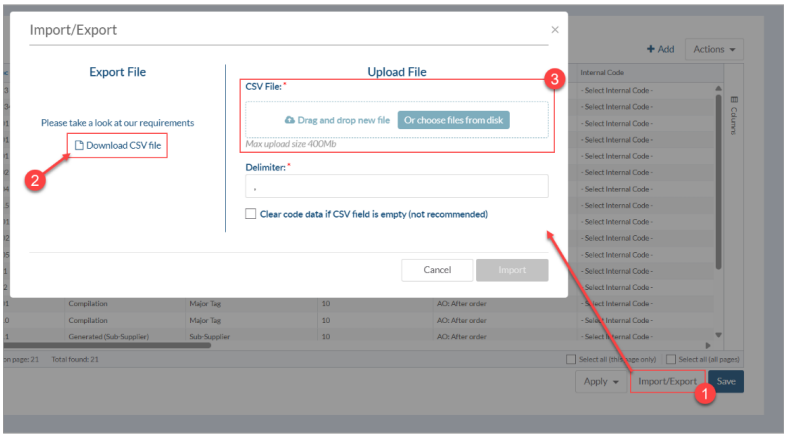
When adding codes to a project, an internal code can be mapped/changed from the pop-up. This mapping will be carried through to the company code list (so it is saved for use on future projects).



Add mapping AFTER adding codes to a project

If you have already imported codes into the project, internal codes can be mapped/changed individually in the grid OR in bulk via CSV import/export.


Pump Project (4531)
Code List
Cards
Code List
Grid row colors
Tools
Internal Code
- Select Internal Code -
- Select Internal Code -
A00 (Document Index)
C00 (Calculations)
D00 (Drawings)
E00 (Data Sheets)
L00 (Lists)
M00 (Manuals)
- Select Internal Code -


Import/Export
Export File
Please take a look at our requirements
Download CSV file
Upload File
CSV File:
Drag and drop new file
Or choose files from disk
Max upload size 400Mb
Delimiter:
Clear code data if CSV field is empty (not recommended)
Cancel
Import
Add
Actions
Apply
Import/Export
Save
1
2
3