Internal Doc Code List

05/22/2025 9:28 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 will copy all of the default settings from your internal codes (level, delivery, etc) into the customer codes. It can speed up the creation of default settings for new customer code lists. (To override this setting, check the box "Always load all field values from this list, NOT from mapped codes.")

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

Of course - the internal list for cross reference supports all of the defaults - so when you do the mapping, the defaults will also cross over.

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

Lists / Companies / Wolfe Systems
Doc Codes

Use internal codes on a project

In the settings area - you can Enable the Mapping to Internal Codes and also have the option to Force mapping (make it mandatory for all doc codes). Note: if you choose to Force Mapping, you must identify an internal code for

every code on your project.

*Note that you can also set both of these options to defaults on project set up. This has to be done by an Admin User under the Admin tab.

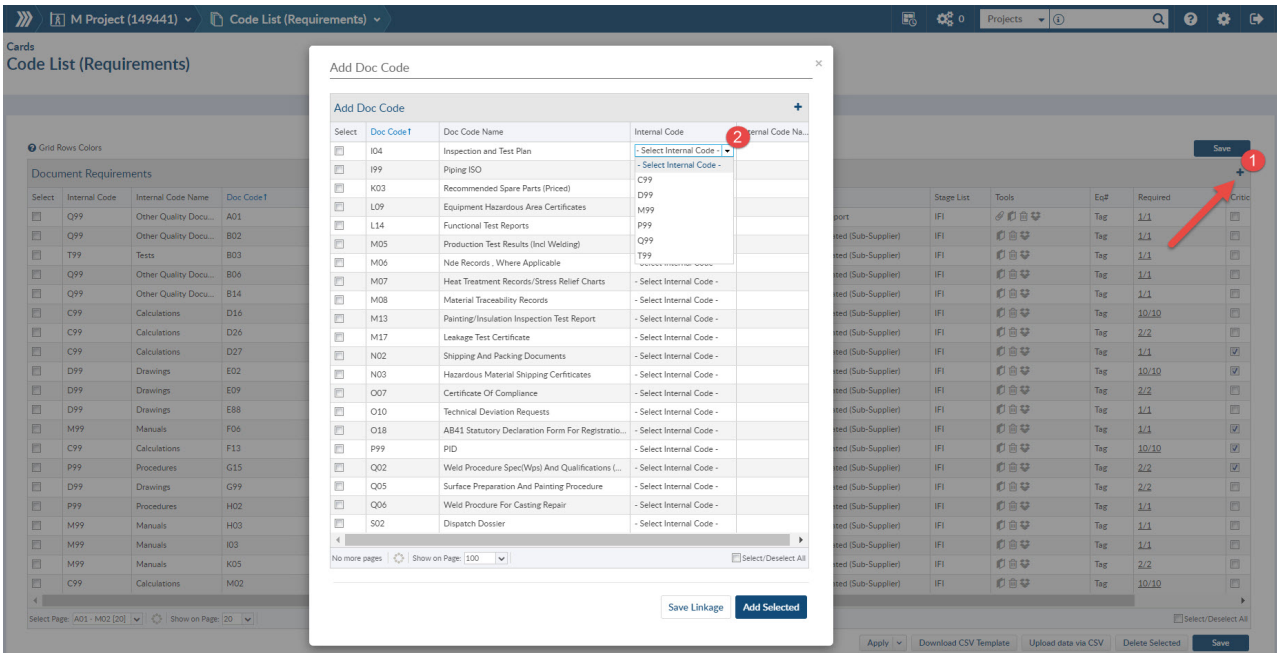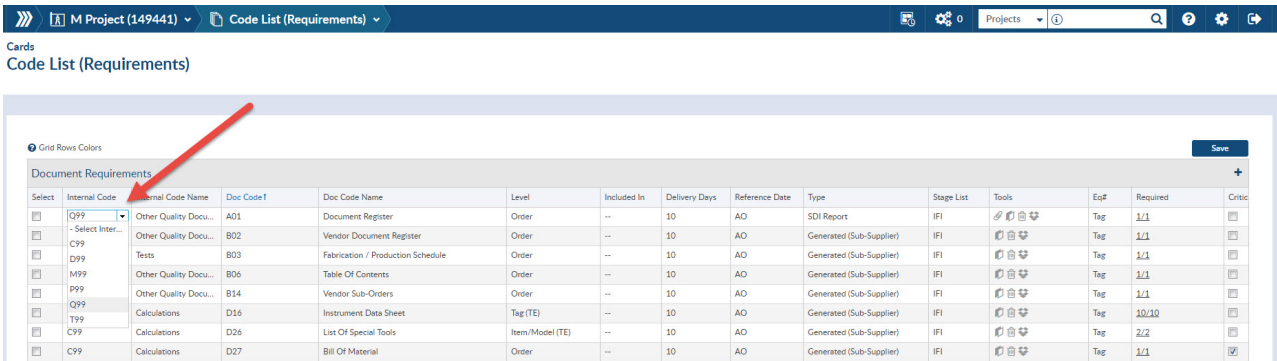# Add mapping while adding codes to a project

The add codes pop up shows you the mapping and allows you to change it (and that setting will be saved to the master list).

Add Mapping AFTER adding codes to a project

If you have already added the code to the project, you must manually set the cross-reference values on the requirements screen. You can add mapping via the internal codes column, or via CSV export/import.

Enjoy Internal Codes!