

Affiliate Management

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Manage business divisions under one account

Allow multiple business divisions to operate within DocBoss via affiliates, and control affiliate access per user.

What are affiliates in DocBoss?



Affiliates are internal companies within DocBoss. They have different default settings, users, internal doc code lists, and more!

Maintain privacy of business or regional groups

DocBoss provides robust access controls, so there's no worry about project ownership between users.



Limit user access

Assign users to one or more affiliates, and enable affiliate permissions only as required for each user.



Access projects

Project access will be automatically limited to users assigned to the applicable affiliate. If you need to limit permissions further, you can assign unique permissions for individual projects.



Share resources

Standardized documents (manuals, procedures, etc.) can be shared with other affiliates, even if you don't share projects with them. Prefer to keep things separate? You can do that, too.

How to set up affiliate companies

It's easy!

Step 1: Open the company list

Step 2: Click the "Add Affiliate" button

Step 3: Give the affiliate company a name, and save!

Balance customization with collaboration

DocBoss provides a number of customization options to meet the unique requirements of each business group while also allowing for collective resource sharing, providing optimal flexibility.

Tailor settings by region

Each affiliate can set unique regional settings, including the time zone and CSV delimiter. If a specific user is located elsewhere, they can update their individual settings to suit their region.

Utilize project templates

Are projects set up the same way across divisions? You can share templates for configuring projects, speeding up the initiation process. If project setup differs across divisions, no problem - each affiliate can have their own template instead.

Set submittal preferences

Business divisions can set their own submittal defaults using the appropriate outbound email address and contact information. These details can then be auto-filled into templated emails, which are available for use across affiliates.

Reuse document templates

If multiple divisions work with the same customer, the customer's templates (cover page, index, transmittal, etc.) can be used across projects, preventing duplication.

Learn more

Book a [personalized demo](#) with one of our Product Specialists today to see how these features can be customized to suit your company's needs.

Or, check out our other features [here](#).
