

# Initiate a Project

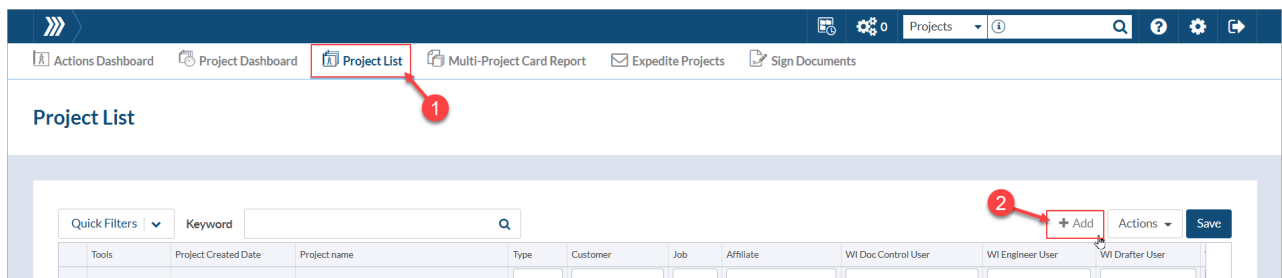
07/04/2025 4:31 pm MDT

A project is the container object in DocBoss. It defines the information required to manage your documentation. It typically reflects the purchase order detail from your customer.

## 1. Create new project

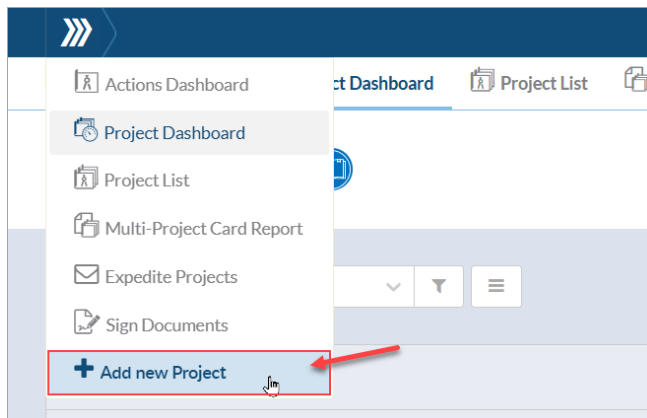
### From Project List (option 1)

Click the "+ Add" button in the top right corner of the grid.



### From Logo Menu (option 2)

From the logo menu, click **Add new Project**.



## 2. Choose project fields template

1. Select template - if there are many templates available, the list can be filtered by affiliate. If you're unsure about which template to use, it is always an option to use the default template and adjust settings on the project if/when required.
2. Click **Continue**.

Create Project

Filter template by affiliate

Select or type ahead...

Choose project template \*

WI: Default Project Fields Template (system)

Cancel

Continue



**Note:** Project Field templates are reusable templates that allow you to start a project in DocBoss knowing that you will be adding all specific data required for that project. If you don't have a template already saved, no problem, you can still add the custom columns at any time throughout a project.

## 3. Complete project quick start

Complete the project Quick Start form.

1. Fill out the required fields
2. To add additional information (optional), select **Show all settings instead**. To read a description of all fields on this screen, see [Project Main Settings](#).
3. Click **Save Project**.

Set Up

Main

Add Project (Quick Start)

1

Project Profile

Project type ☒ Order ☐ Quote

Affiliate \*

Wolfe Instruments

Affiliate address \*

Default

WI sales order \*

Job

Select or type ahead...

Order date \*

Initial guess for drawing approvals \*

Project name \*

Customer \*

Select or type ahead...

Customer address \*

Select or type ahead...

PO number \*

PO rev number

Package number

Project description

Date format \*

dd-MMM-yyyy

End User

Select or type ahead...

End User address

Select or type ahead...

End User reference

2

Show All Settings Instead

Lists, Users and Custom Fields

Code lists

Use code lists from

☒ Customer lists
 ☐ WI lists
 ☐ End User lists

Doc code list \*

Select or type ahead...

Status lists

Use status lists from

☒ Customer lists
 ☐ WI lists
 ☐ End User lists

Customer return status list \*

Create on Project

WI internal approval status list \*

Internal Approval - Default

Users

WI Doc Control user(s) \*

Select or type ahead...

WI Project Engineer user(s)

Select or type ahead...

WI Drafting user(s)

Select or type ahead...

WI Project Manager user(s)

Select or type ahead...

Other Data and Custom Fields

Other data

This project has no custom Project (Main) fields enabled.

3

Save Project

The project is now created. Next, add the [list of equipment](#) and [doc codes](#).

---