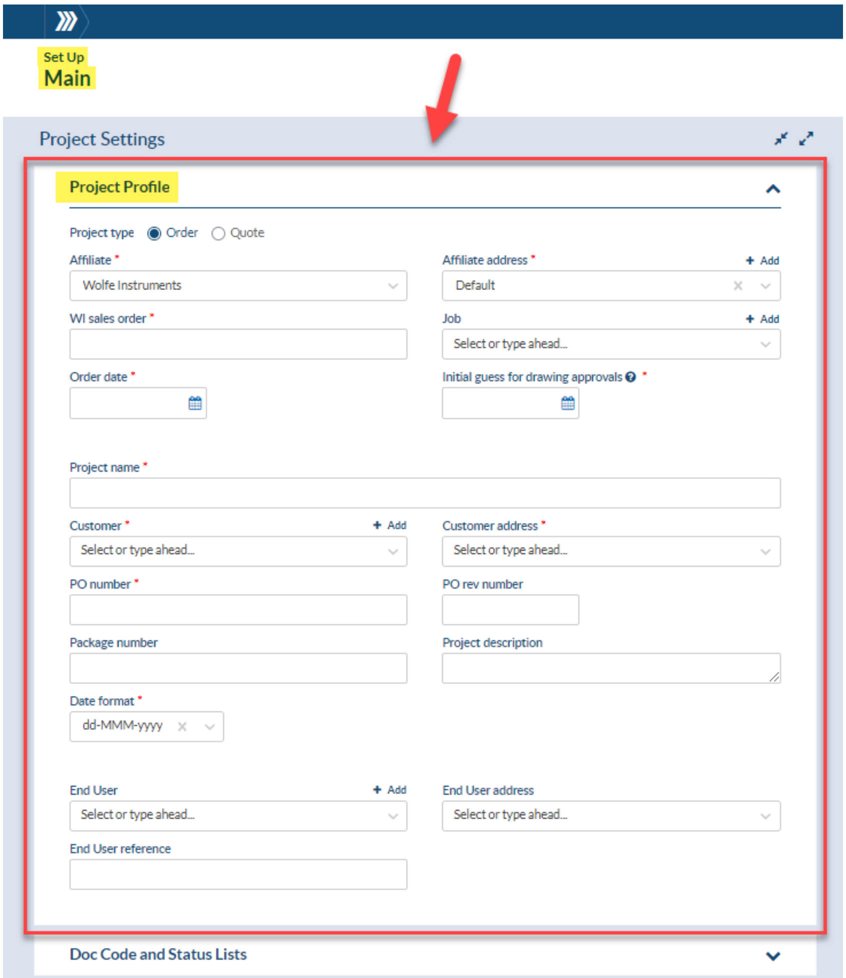
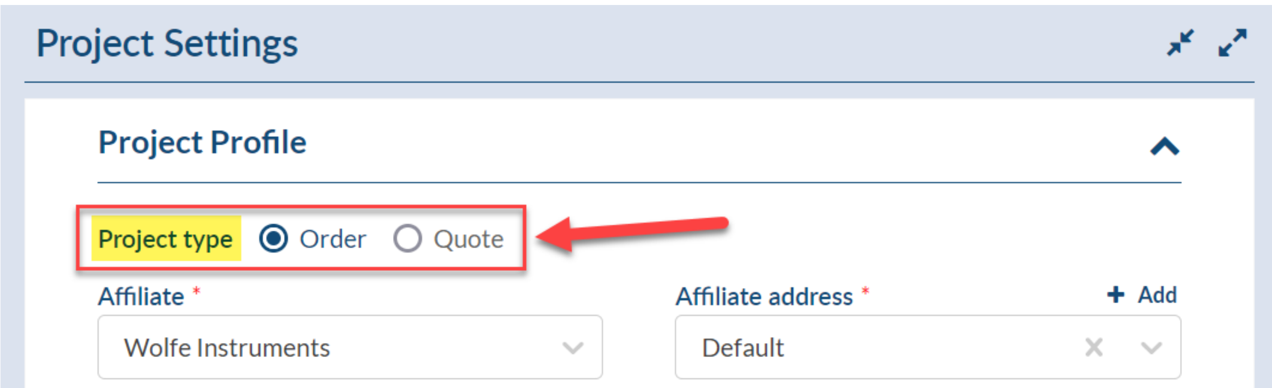
Project Profile Definitions

10/18/2024 12:40 pm MDT

The **Project Profile** is a section of the Project **Set Up > Main** screen. This section is for your customer (the company to whom you are submitting the documentation), all applicable transaction numbers, the End User (if applicable) and the order date and approved drawing date.



The **Project type** (Order or Quote) will vary the the fields that are available. In most cases you will use **Order**.



Field definitions

- **Affiliate:** the Supplier company.
- **Affiliate address:** Supplier's document control address.
- **Sales Order:** Your company's sales order number (your internal reference)
- **Job:** Group multiple projects together for reporting and searches.
- **Order Date:** The date the order was placed. Used for determining due dates.**Initial Guess for Drawing Approvals:** The date you expect to receive approved Drawings. This date is used to determine due dates for "ARAD" references. It will default to 4 weeks from order date if nothing is entered.
- **Project name:** Be descriptive when naming a project because this will appear on lists and document cover pages. Using a descriptive name also eases project reporting and searches.
- **Customer:** The customer to whom you submit documents.
- **Customer address:** Customer's document control address.
- **PO Number:** The customer's purchase order number.**PO Rev Number:** Customer revision number.
- **Package Number:** A package number for tracking documents.
- **Project description:** This is a text field for you to add further data describing your project. Can also be used as output on templates.
- **Date format:** the date format your customer wants to see on templates.
- **End User:** The end user for the equipment you are supplying.
- **End User Address:** The end user's address.
- **End User Reference:** A number the end user refers to.

Order vs Quote

Orders are to be selected once you are ready to start managing the documentation for your customer. **Quotes** can be used to supply documentation costs to your customer prior to them placing an order. Also, note the Quotes do not have dates, Orders have Order date and Approved drawing date fields.
Note the differences in field names when changing from **Order** to **Quote**:

- **Order** - Sales Order, Package Number and PO Number vs
- **Quote** - Quote Number and RFQ Number

You can change the button from **Quote** to **Order** and update with the sales order information when the quote coverts to an order. All documents previously attached to the quote will remain.