Definitions of the Project Setup

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This is the main **Setup** of your project. You have two options and the selection will vary the fields that are available.
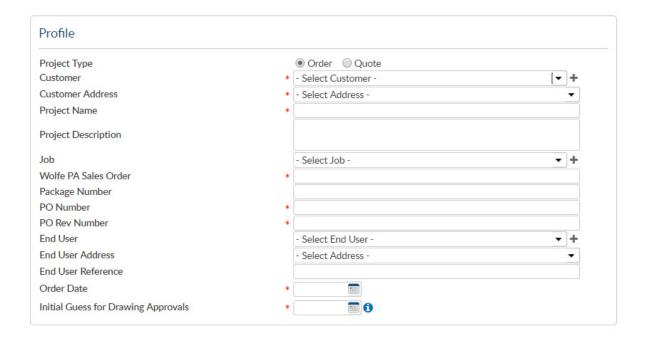
Option 1 - Order

Option 2- Quote

Profile

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.
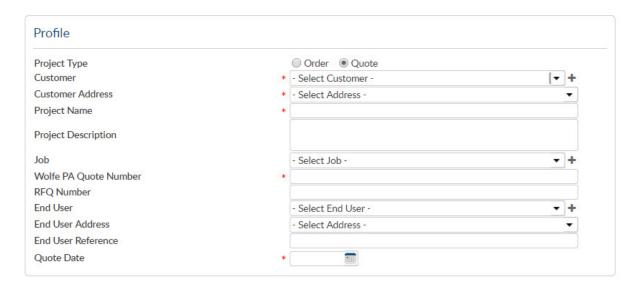
Option 1 Add New Order

Orders are to be selected once you are ready to start managing the documentation for your customer.

Option 2 Add New Quote

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.

Customer: The customer to whom you submit documents.

Customer Address: Customer's document control address.

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.

Project Description: This is a text field for you to add further data describing your project. Can also be used as output on templates.

Job: Group multiple projects together for reporting and searches. For example, if you have two projects for a customer and you want to report across both projects, enter a job number on Project 1 and enter the same job number on Project 2.

Sales Order: Your company's sales order number (your internal reference)

Package Number: A package number for tracking documents.

PO Number: The customer's purchase order number.

PO Rev Number: Customer revision number.

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 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.

Settings

This section allows you to configure a variety of project-specific options.

Enable Grid Search for Large Project: For large projects, this field can be enabled to speed loading of grids

Card Name Suffix: If you intend to use the default naming convention in DocBoss and need to further distinguish the documents from another project.

Delivery Output: Used in the quoting module to enable the prices output column in the output pdf file.

Customer Turn Around: The estimated number of working days it takes your customer to return documents for approval. This field will affect document delivery dates - you can use your default in this area.

Sub-Supplier # Override: Set default Sub-Supplier #Override values for codes.

Instance Turn Around: The estimated number of working days it takes your company to internally review the documents.

Enable Mapping to Internal Codes: Enable mapping of master doc codes to internal codes from Affiliate cross reference list.

Action Turn Around: The estimated number of working days it takes internal actions to take. For example if you

assign a document for internal review or other action, you are giving yourselves 5 days (1 week) to complete the review or action.

Date format: This allows you to choose the date format for how you want to see it in your project and also on output of templates.

For more details about Project Setup have a look at our video: Starting a New Project in DocBoss.