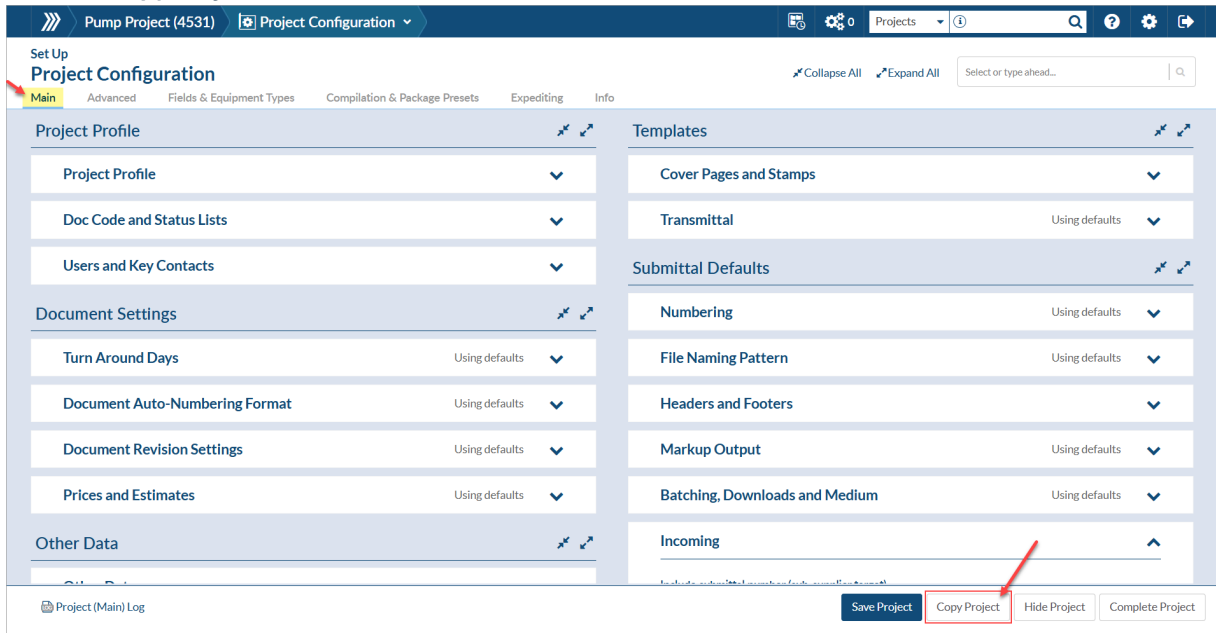


Copy a Project

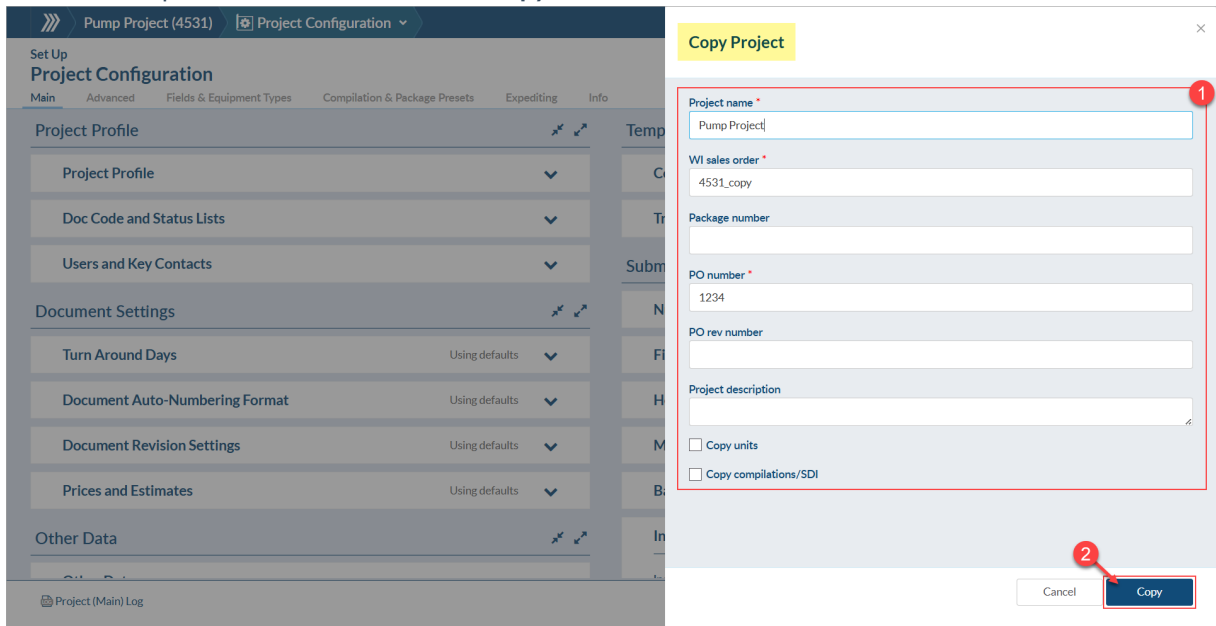
09/24/2025 2:47 pm MDT

Often, a customer may place an order which is very similar to an order from the past. In these circumstances, you may find it saves time to copy an existing project to jumpstart the setup process.

1. Open the project you wish to copy.
2. Navigate to **Project Menu > Set Up > Project Configuration** and open the "Main" tab
3. Click the **Copy Project** button.



4. Fill out the requested information and click **Copy**.



Note:

- In the newly created project, you will need to change the sales order number and the purchase order number (if applicable).

- You must complete the project document list by filling out the delivery days and reference date.
 - If you selected the checkbox to copy the units, the stages and levels on the Code List (Requirements) screen will be filled out for you.
 - Adjust the document ref assign screen as needed.
 - Before you begin attaching documents to the new project ensure that you re-run the document auto numbering format again. If you don't the references will contain the old sales order numbers.
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