Copy a project

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Often times a customer may place an order which is very similar to an order from the past. In these circumstances, the ability to copy a project will come in very useful.

To Get Here:

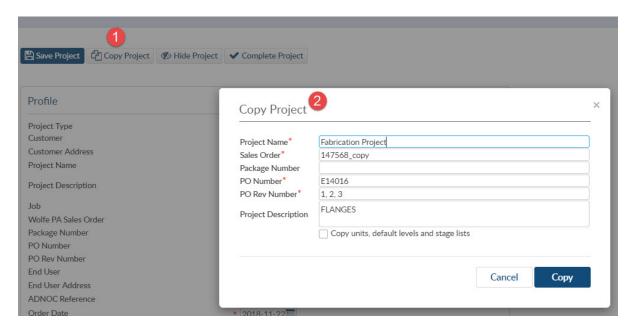
Open the project you wish to copy, navigate to the setup main dashboard.

Let's Do It:

1. Click the copy project button.

2. Complete Details

- Enter a name for the new project.
- Check the copy units option if you want to copy all the units default levels and stages lists into the new project.
- Click the copy button to finalize the action.



Some Things to Notice:

- 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 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.