

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.

The screenshot shows a software interface with a top navigation bar containing buttons for 'Save Project', 'Copy Project', 'Hide Project', and 'Complete Project'. A red circle with the number '1' is positioned over the 'Copy Project' button. Below this is a 'Profile' sidebar with various project details. A 'Copy Project' dialog box is open in the foreground, featuring a title bar with a red circle and the number '2'. The dialog contains the following fields and values:

Field	Value
Project Name*	Fabrication Project
Sales Order*	147568_copy
Package Number	
PO Number*	E14016
PO Rev Number*	1, 2, 3
Project Description	FLANGES

At the bottom of the dialog, there is an unchecked checkbox labeled 'Copy units, default levels and stage lists' and two buttons: 'Cancel' and 'Copy'.

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.