

# Using "Create Project" call if not all data available in ERP system

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The **Create Project** call can be used to automatically trigger project creation in DocBoss when an order is added to an external system.

When a doc control user creates a new project in DocBoss, they typically have information from the Vendor Document Requirements List (VDRL) that may not be stored in your ERP system. When creating a project automatically via the API, we recommend using some placeholder data for information that is unknown in the ERP system, which the doc control user can update later.

## Field explanations

These fields are commonly used:

Field*	Required?	Details
template_id template	Required	<ul style="list-style-type: none"><li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search the template <b>name</b> field for a match.</li></ul>
type	Required	<ul style="list-style-type: none"><li>Use "<b>order</b>" unless requested otherwise.</li></ul>
affiliate_id affiliate	Required	<ul style="list-style-type: none"><li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search across these fields for a match: <b>full name, short name, and external reference</b>.</li><li>Only applicable if affiliates are enabled in system. This value is important as it cannot be changed after the project is created.</li></ul>
affiliate_address_id affiliate_address	Optional	<ul style="list-style-type: none"><li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search the address <b>label</b> field for a match.</li><li>If field is excluded from the call, the address with the smallest ID will be assigned.</li></ul>
customer_id customer	Required	<ul style="list-style-type: none"><li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search across these fields for a match: <b>full name, short name, and external reference</b>.</li></ul>
customer_address_id customer_address	Optional	<ul style="list-style-type: none"><li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search the address <b>label</b> field for a match.</li><li>If field is excluded from the call, the address with the smallest ID will be assigned.</li></ul>
name	Required	<ul style="list-style-type: none"><li>The customer's name for the project (that they want to show on cover pages, etc.)</li></ul>
quote_or_order_number	Required	<ul style="list-style-type: none"><li>Sales order number - must be unique value.</li></ul>
order_date	Required	<ul style="list-style-type: none"><li>Order date. If unknown, can set placeholder date and doc control can adjust. Format is "<b>YYYY-MM-DD</b>".</li></ul>

\*Where multiple fields are listed, only one should be used (depending on search value).

role_X_user_id[] role_X_user[]	Optional	<ul style="list-style-type: none"> <li>X refers to the user's role on the project. The value is one of 1,2,3,4.</li> <li>Can use either the <b>ID</b> (internal database ID) or name. If generic, we search user profiles for a match using this pattern: "[<b>FirstName</b>] &lt;space&gt;[<b>LastName</b>]". (For example, "John Smith".)</li> <li>Optional: create a placeholder reviewer user and name them "Not Yet Assigned", and set this user as step1_users for this call. Doc control users can then filter the Project List by projects belonging to the placeholder user, and assign themselves to the project instead.</li> </ul>
doc_code_list_type	Required	<ul style="list-style-type: none"> <li>Options are <b>customer</b>, <b>internal</b>, and <b>end user</b>.</li> <li>Typically this information would not be stored in ERP systems, so most companies would set this value to <b>internal</b> when creating the project, and leave to doc control to change it later if required.</li> </ul>
doc_code_list_id doc_code_list	Optional	<ul style="list-style-type: none"> <li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search the code list <b>name</b> field for a match.</li> <li>If field is excluded from the call and the <b>list_type</b> is internal, the primary/cross reference list for the applicable affiliate will be assigned.</li> <li>If field is excluded from the call and the <b>list_type</b> is customer or end user, the list with the smallest ID from the applicable company will be assigned.</li> </ul>
status_list_type	Required	<ul style="list-style-type: none"> <li>Options are <b>customer</b>, <b>internal</b>, and <b>end user</b>.</li> <li>Typically this information would not be stored in ERP systems, so most companies would set this value to <b>internal</b> when creating the project, and leave to doc control to change it later if required.</li> </ul>
status_list_id status_list	Optional	<ul style="list-style-type: none"> <li>Can use either the <b>ID</b> (internal database ID) or the generic name. If generic, we search the status list <b>name</b> field for a match.</li> <li>If field is excluded from the call, will be set as "Create on Project".</li> </ul>
*Where multiple fields are listed, only one should be used (depending on search value).		

## Sample request

Here's an example of how the **required** fields might be filled out:

Field	Example
template	default
type	order
affiliate	Alpha Supply
customer	ACME
name	Skids for New Plant
quote_or_order_number	0001234
order_date	12/18/2024
doc_code_list_type	Internal
status_list_type	Internal

For additional context on what these fields are used for in DocBoss, see [Project Profile Definitions](#) and [Definitions](#)

of the Default Users and Lists section.

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