

Using "Create Project" API Call

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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



For the table below, if multiple options are allowable (e.g., **template_id** and **template**), include only *one* of the fields in the request body. Leave the other field out entirely (rather than set it as *null*).

These fields are commonly used:

Field*	Required?	Details
template_id template	Required	<ul style="list-style-type: none">Can use either the ID (internal database ID) or the generic name. If generic, we search the template name field for a match.This call ignores template restriction per affiliate.
type	Required	<ul style="list-style-type: none">Use "order" unless requested otherwise.
affiliate_id affiliate	Required	<ul style="list-style-type: none">Can use either the ID (internal database ID) or the generic name. If generic, we search across these fields for a match: full name, short name, and external reference.Only applicable if affiliates are enabled in system. This value is important as it cannot be changed after the project is created.
affiliate_address_id affiliate_address	Optional	<ul style="list-style-type: none">Can use either the ID (internal database ID) or the generic name. If generic, we search the address label field for a match.If field is excluded from the call, the address with the smallest ID will be assigned.If the affiliate has <u>no</u> addresses on their company profile, this will result in an error.
customer_id customer	Required	<ul style="list-style-type: none">Can use either the ID (internal database ID) or the generic name. If generic, we search across these fields for a match: full name, short name, and external reference.
customer_address_id customer_address	Optional	<ul style="list-style-type: none">Can use either the ID (internal database ID) or the generic name. If generic, we search the address label field for a match.If field is excluded from the call, the address with the smallest ID will be assigned.

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

name	Required	<ul style="list-style-type: none"> The customer's name for the project (that they want to show on cover pages, etc.)
quote_or_order_number	Required	<ul style="list-style-type: none"> Sales order number - must be unique value.
order_date	Required	<ul style="list-style-type: none"> Order date. If unknown, can set placeholder date and doc control can adjust. Format is "YYYY-MM-DD".
role_X_user_id[] role_X_user[]	Optional	<ul style="list-style-type: none"> X refers to the user's role on the project. The value is one of 1,2,3,4. Can use either the ID (internal database ID) or name. If generic, we search user profiles for a match using this pattern: "[FirstName <space>[LastName]" (For example, "John Smith".) 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.
doc_code_list_type	Optional	<ul style="list-style-type: none"> Options are customer, internal, and end user. Typically this information would not be stored in ERP systems, so most companies would set this value to internal when creating the project, and leave to doc control to change it later if required. If included, must also include doc_code_list_id or doc_code_list value. If not included, defaults to internal primary doc code list for the project's affiliate.
doc_code_list_id doc_code_list	Optional	<ul style="list-style-type: none"> Can use either the ID (internal database ID) or the generic name. If generic, we search the code list name field for a match. If field is excluded from the call and the list_type is internal, the primary/cross reference list for the applicable affiliate will be assigned. If field is excluded from the call and the list_type is customer or end user, the list with the smallest ID from the applicable company will be assigned. If included, must also include doc_code_list_type.
status_list_type	Required	<ul style="list-style-type: none"> Options are customer, internal, and end user. Typically this information would not be stored in ERP systems, so most companies would set this value to internal when creating the project, and leave to doc control to change it later if required.
status_list_id status_list	Optional	<ul style="list-style-type: none"> Can use either the ID (internal database ID) or the generic name. If generic, we search the status list name field for a match. If field is excluded from the call, will be set as "Create on Project".
*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.
