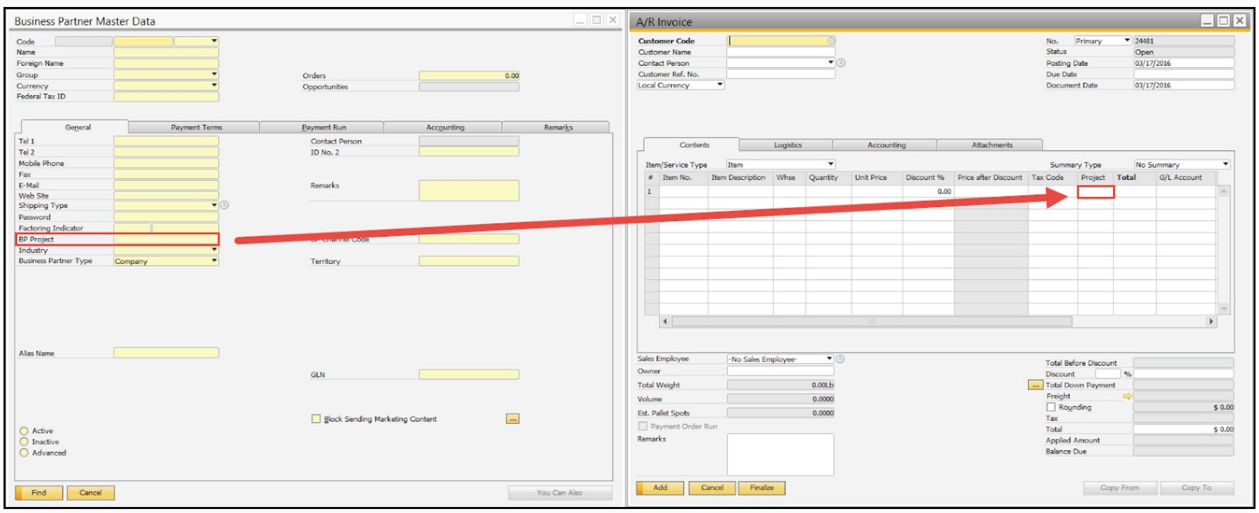
How To: Disable Projects From Automatically Populating In Marketing Document Line-Items

Summary

After assigning Projects to Business Partners, those Projects will automatically populate in the Project field for all associated marketing documents for that BP. This means that each line-item on the Invoice will be associated with the Project assigned in this field. (Please note: If you do not see the ‘Project’ field on a marketing document, you may need to adjust your Form Settings to bring it into view: Form Settings Help Page



Even when Projects are assigned to Business Partners, they might only be needed for specific items and purposes and it might not be helpful for the project to be automatically assigned to each line item.

If this is the case, you can disable the query for the user-defined value that automatically populates the ‘Project’ field on marketing documents.

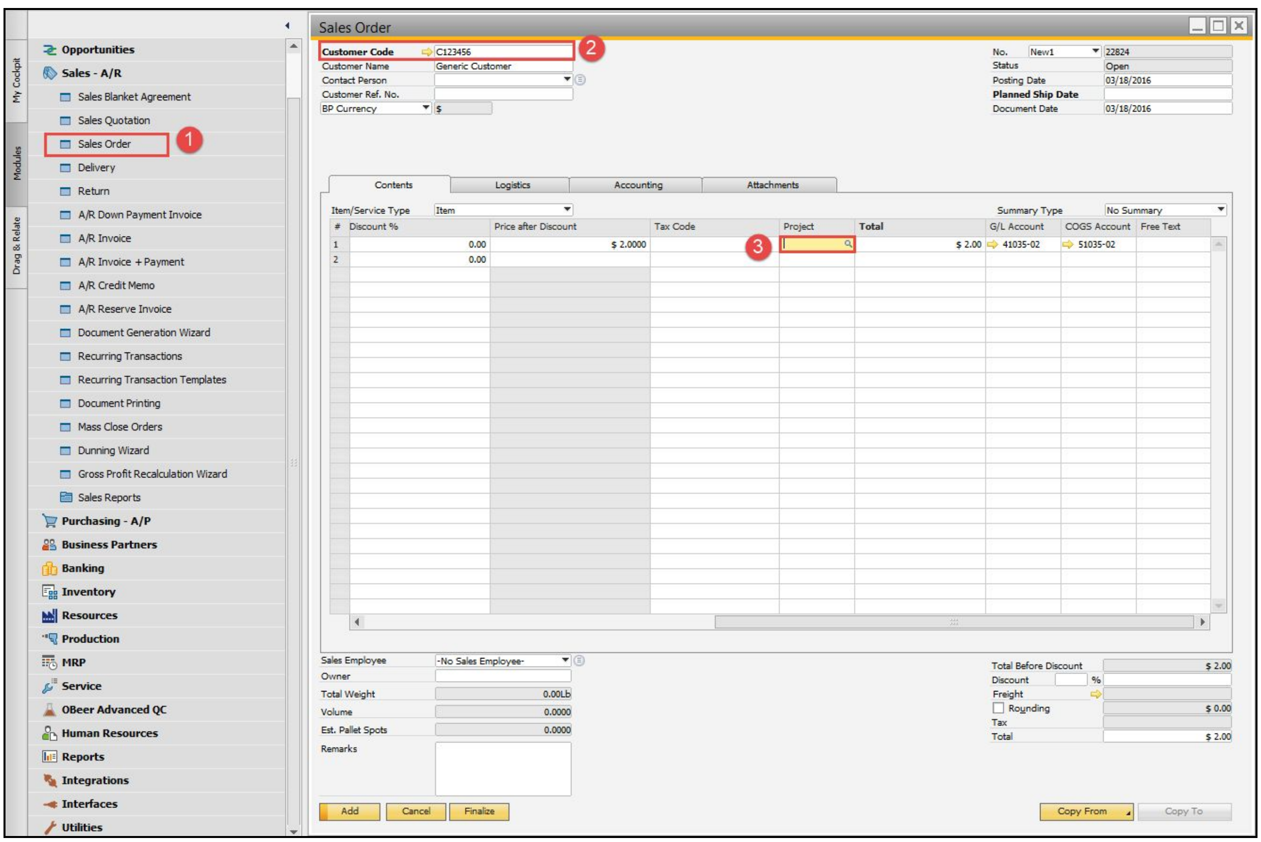
If you disable the query for Sales Orders then none of the subsequent documents that you copy to, i.e. Deliveries, A/R Invoices, from a Sales Order will populate with the project code on the line-items.

However, if you make this change for a Sales Order, but create a Delivery or an A/R Invoice that isn't copied from a Sales Order, then the project will get pulled into the line-items on the Invoice.

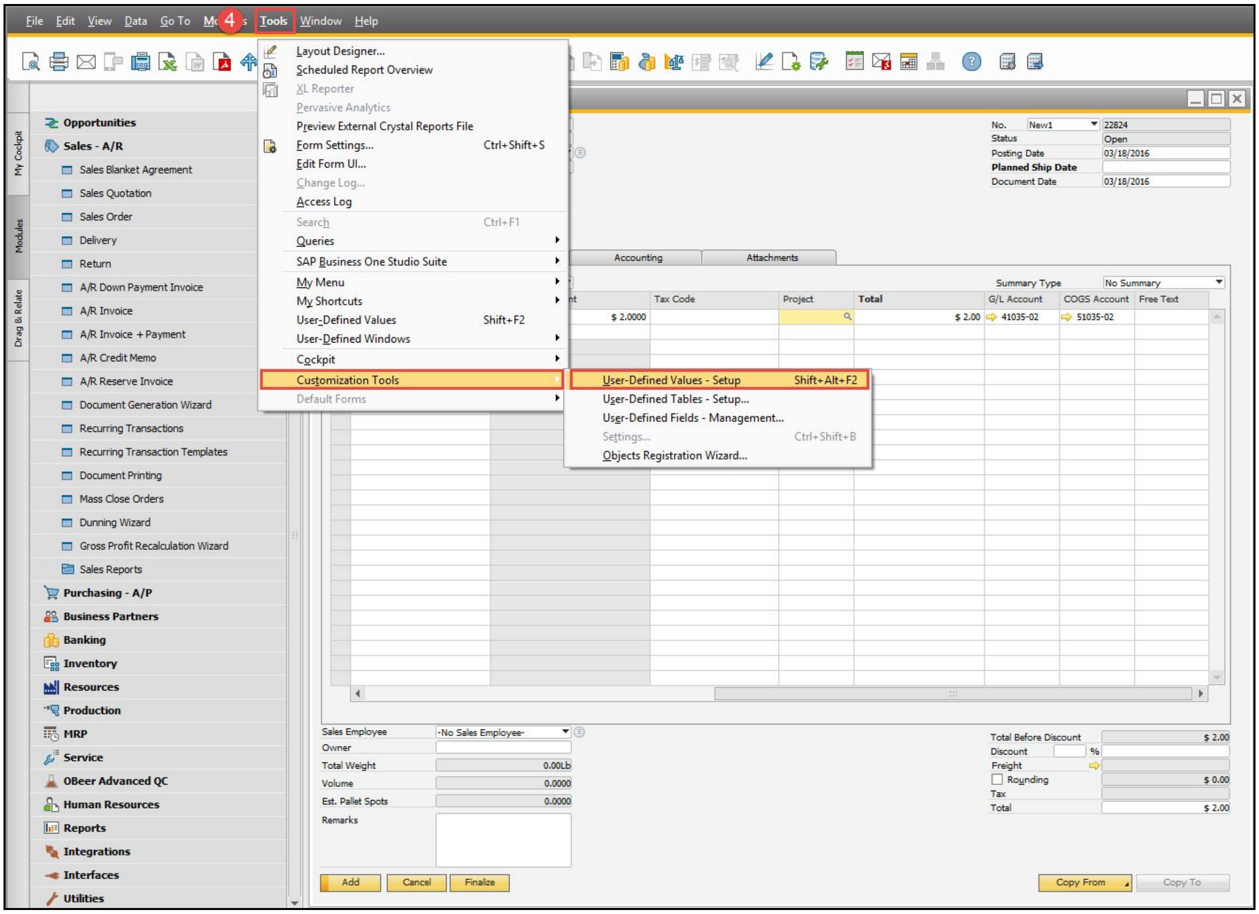
The cleanest way to ensure that the projects don't populate for any of your documents would be to turn off the query, using the steps provided below, for all of the sales and purchasing documents that you don't want the projects to automatically populate in line-item rows for.

Step-by-Step Guide

1. Open up a new Sales Order, or another marketing document based on the notes above.
2. Enter any BP into the Customer Code field and any item into the first row of the document. You won't actually be adding anything, but you'll be using the document to preserve the change.
3. Click into the cell under 'Project

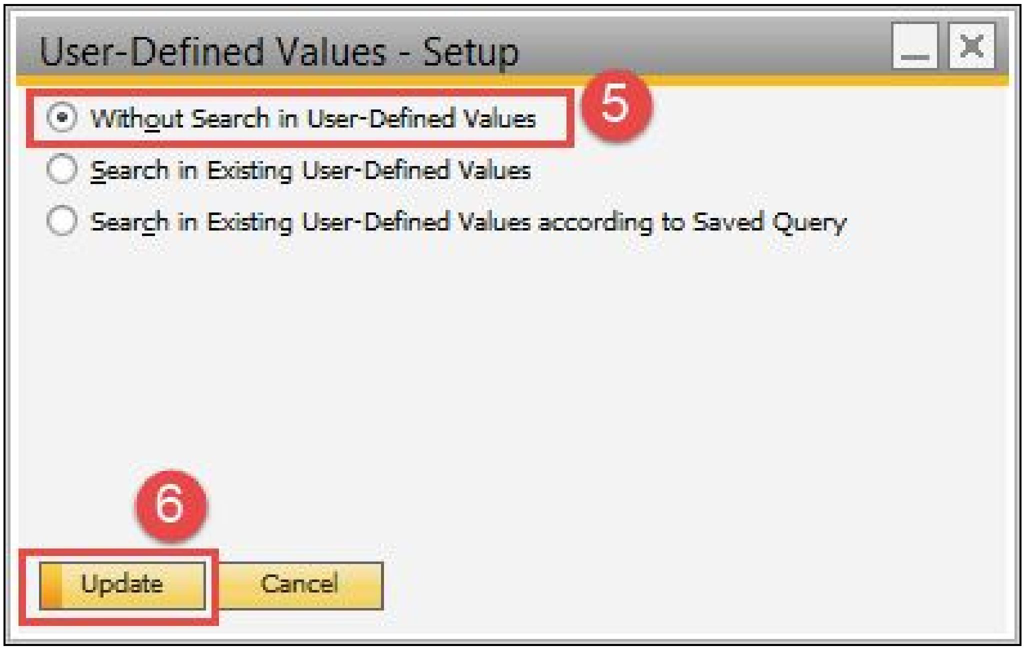


4. Navigate to: Tools > Customization Tools > User-Defined Values – Setup



5. Click on the Radio button next to: ‘Without Search in User-Defined Values’

6. Click ‘Update’ and then ‘Ok’



7. You can now ‘Cancel’ out of the Sales Order or marketing document and your change will be preserved.

Now, projects will no longer automatically populate in the line items, but you can still manually add them as needed.