QUICK REFERENCE: MERGING PROJECTS

- PREFACE:

This document has been created to show users how to merge projects together. This is an option when needing to turn a manually created project into an assignment from XactAnalysis. It can also be used if several adjusters have worked on the same project and need to combine them into one.

1. Navigate to the Projects tab and select the project you want to be the main project. Right click on the project and choose Merge Projects.

2. The Merge Wizard will open to guide you through the merging process. Click next to choose which projects to merge together.

3. To finish this process choose the project you want to be the Source Project. Then click the Add Projects button to choose the projects you want to merge with your source project. Click Finish to complete the merging process.