

Job Aid: Merge a Workfile with an Open Shop Assignment

Overview

There will be occasions when you will need to merge an existing, manually created workfile with an Insurance Company Assignment, an Open Shop Assignment or an EMS Assignment. You can merge them with a New Assignment if the manually created workfile is not Locked or a Total Loss. This job aid describes how to merge an existing Workfile with an Open Shop Assignment.

Procedure

Use the following steps to merge the manual Workfile with the Open Shop file:

Step	Action
1	To begin, make sure you are on the Workfiles View so that you can see all of your Workfiles and Assignments.
2	Click once on the New Assignment to select it.

Quick Search Results

New Opportunity New Repair Order Refresh Preview Print Print Preview

More than 150 results found. Please narrow your search criteria.

Updates	Linked	Priority	Estimate Version	RO Number	Owner	Primary Phone	Job Nu
★		🔔			Swetha, kumari		
★		⚙️			Conner, Marcos	(444) 444-4444 Cell	
★		⚙️			McCarthy, Alejan...		
★		🔔			as, ...		
★		🔔			Sush, M		
★		🔔			...		

2002 Toyo 4Runner SR5 Automatic 4WD (New)

McCarthy, Alejandro **WORKFLOW**

VIN: JT3HN86R820372914 Estimator: Edwin Bulnes

Color: Estimate \$: --

License: Hours: --

★ OPEN SHOP ASSIGNMENT

This is an Open Shop assignment. To complete, select the "Action" menu and choose an option to accept assignment or merge with another workfile. [Learn more...](#)

[Chat with Tech Support](#)

No general notes exist on this workfile

3	Go to Action on the mini-toolbar and select Merge . The Merge Select Workfile screen opens.
---	---

Continued on next page

Job Aid: Merge a Workfile with an Open Shop Assignment, Continued

Procedure,
continued

Step	Action
4	Enter a Search term and click Search or leave blank and Search .
4	Select the Workfile to merge.
5	Click Next . The Confirm Merge screen displays.

Continued on next page

Job Aid: Merge a Workfile with an Open Shop Assignment, Continued

Procedure,
continued

Step	Action
6	Review and confirm the Assignment and Workfile information to be merged.
7	Click Next .
8	If you have already added images or attachments, select the ones to merge with the Assignment and send to the Insurer.
9	Click Finish .

The workfile opens for you to continue working.

Remember to Save and Close!