How to Merge a Workfile with an Open Shop Assignment

Overview   Occasionally, 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 document describes how to merge an existing Workfile with an **Open Shop Assignment**.

Procedure

Step	Action
1	Open the **Workfiles** View.
2	Click once on the appropriate **New Assignment** to select it. **Note:** You may be prompted to create a new Claim Office profile.
3	From the **Action** mini toolbar, select **Merge.**
4	To select the workfile, enter the appropriate search terms or leave the search field blank and click **Search. Note:** Search terms can include vehicle owner, claim number, make, model, and/or VIN information.
5	Select the **Workfile** to merge.
6	Click **Next**.
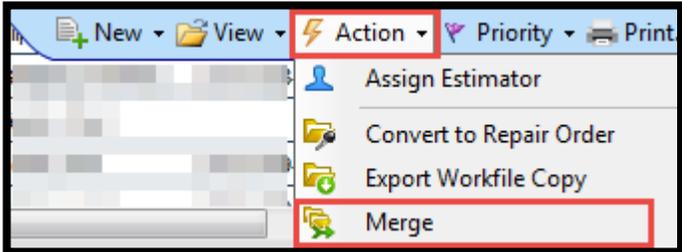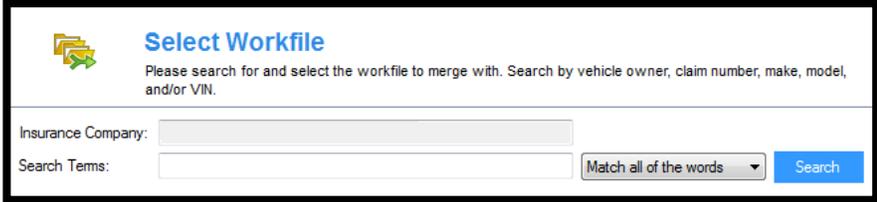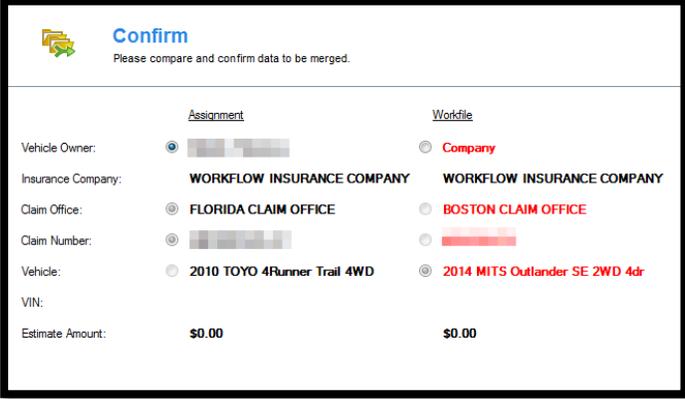
Step	Action
Procedure, continued	
7	Review and confirm the assignment and workfile information to be merged. **Confirm** Please compare and confirm data to be merged. |	Assignment	Workfile | Vehicle Owner: ☑ ░░░ ░░░ ○ Company Insurance Company: WORKFLOW INSURANCE COMPANY / WORKFLOW INSURANCE COMPANY Claim Office: ☑ FLORIDA CLAIM OFFICE ○ BOSTON CLAIM OFFICE Claim Number: ☑ ░░░ ○ ░░░ Vehicle: ○ 2010 TOYO 4Runner Trail 4WD ☑ 2014 MITS Outlander SE 2WD 4dr VIN: Estimate Amount: $0.00 / $0.00
8	Click **Next**.
9	The merge is processed. If you have already added images or attachments, select the ones to merge with the Assignment and send to the Insurer. **Send to Insurance** Please select attachments to send to the insurance company.
10	Click **Finish**.
11	The workfile opens for you to continue working as needed.
12	When finished, click **Save and Close**. FILE WORKFILE VIEW Save Save and Close Print New File