

## Job Document Merge

Documents can be merged three (3) ways.

At the bottom of the Add New Lead page within the Document Merge section. Office and Company Documents may display as an option to be merged from this page.

1. Select the Document you would like merged; use your Ctrl key to select multiple packets to be merged.
2. After the lead/job is saved the document(s) within the packet(s) will be merged and stored within the Documents & Pics Tab.

**Document Merge**

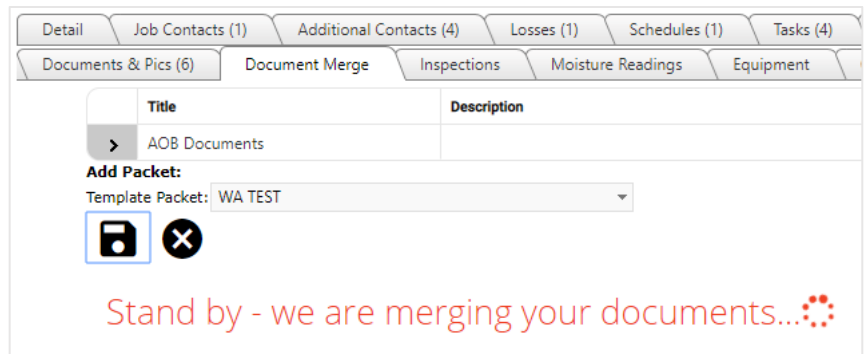
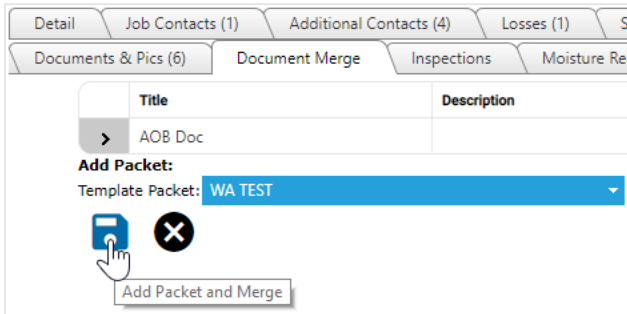
Office: WA TEST Select the packets to add and merge.  
\*Ctrl-Click to select multiple items in the list

Company: State Farm - Work Authorization All packets will be merged.

From the Job → Document Merge Tab

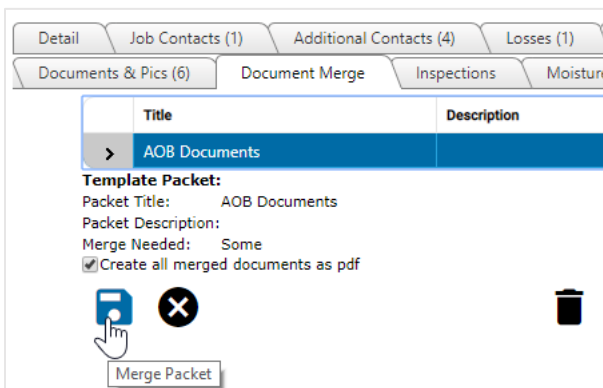
1. Click the **Add Template Packet** icon.
2. Select the **Template Packet** you would like to merge from the drop-down.
3. Click the **Add Packet and Merge** icon.

*Note: To merge additional packets repeat the steps*



From the Job → Document Merge Tab; if the *Assign to All Jobs* option was selected when the template packet(s) were setup by the Administrator. That means all the template packets are applied to all jobs.

1. Single click on the **Title** (Packet) you would like to merge.
2. Click the **Merge Packet** icon to merge the document(s) within the packet.



## Job Document Merge

**Note:** if a packet has more than one document within it and you only need to merge one of the documents click the triangle to expand then single click the document you would like to merge.

Detail | Job Contacts (1) | Additional Contacts (4) | Losses (1) | Schedules (1) | Tasks (4)

Documents & Pics (6) | **Document Merge** | Inspections | Moisture Readings | Equipment

| Title           |             | Description |              |               |
|-----------------|-------------|-------------|--------------|---------------|
| ▼ AOB Documents |             |             |              |               |
| Title           | Description | Viewable    | Merge As Pdf | Template View |
| AOB.docx        |             | No          | Yes          | View          |
| AOB TPA.docx    |             | No          | Yes          | View          |

**Template:**  
 Packet:  
 Template Title: AOB.docx  
 Template Description:  
 Date Merged:  
 Merged Document will be Viewable by Job Contact  
 Create merged document as pdf

Merge Template

After the merge is complete the document(s) are stored and viewable within the Documents & Pics tab.

**Note:** The Description field will auto fill with the merge date and time.

Detail | Job Contacts (1) | Additional Contacts (4) | Losses (1) | Schedules (1) | Tasks (4) | Subs/Techs | Financials\*\* | Correspondence (5)

Documents & Pics (7) | **Document Merge** | Inspections | Moisture Readings | Equipment | Change Log

Documents

Select All Photos (Current Job)

- +
- ▶ **\_Master Documents**
- ▶ 1. Initial Photos
- ▶ 2. Progress Photos
- ▶ 3. Final Photos
- ▶ COS Documents
- ▶ Estimate (CO, SUP, Revisions)
- ▶ Other Job Documents
- ▶ Receipts
- ▶ Work Authorization/Contract Docs
- Services Work Authorization TE

| Title                                 | Description                    | Master | Viewable in Portal | View | Changed                           | Job #      |
|---------------------------------------|--------------------------------|--------|--------------------|------|-----------------------------------|------------|
| Services Work Authorization TEST.docx | Merged [2/9/2019 11:26:23 PM]: | No     | Job                |      | Dawn Bryant - 02/09/2019 10:26 PM | 19-102RCON |