Merge / Split Instance(s) Transition Process

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In situations where companies request to merge or split existing instances, the steps in this article help with getting the new instance set up for use.

This article assumes that the company is:

- Merging two (or more) existing instances into one, OR
- Splitting one existing instance into two (or more) separate instances

Transition into the NEW instance(s)

1. Customize instance **Admin** > **General** settings as required.
2. Set up affiliates if required to create separation between business divisions.
3. Add the appropriate users to the new instance(s) and configure their permissions.
4. Migrate any custom fields still required and/or in use on project or output templates:
    - **Project (Main) Fields**
    - **Doc Code/Card Fields**
    - **Equipment Fields**
    - **Custom Lists (for fields)**
    - **Labels** (found under **Admin** > **General** > **Labels**)
5. Recreate any **Project Templates** that will still be used.
6. Migrate **Output Templates**:
    - Download any customized XLS/CSV templates and upload them to the new instance(s).
        - If the templates use any variables for custom fields, note that the custom field ID may be different in the new instance. After setting up the new custom fields in the new instance(s), it is recommended to use a global find and replace in Excel for each template to update custom field variables before uploading to DocBoss.
    - Migrate (manually copy and paste) any customized email templates to the new instance(s).
7. Migrate **Other Lists** (**Default Prices, Delivery Mediums**, and **Ignored Values**) if required.
8. If the library documents from the old instance will be needed in the new instance, follow the steps in this article to migrate them.

Transition out of the OLD instance(s)

After the agreed upon amount of time, you will lose access to the old instance(s).

Please reach out to DocBoss Support to talk about how long you'll have to complete the transition to the new instance.

We recommend completing any open projects in the old system, and starting new projects in the new system.

For information on archiving old projects, see this article. DocBoss support can also delete projects upon request from admin users.