



Copying a project to another sub portal

Ester Andersson - 2024-07-29 - Tips & Tricks

1. Go to the client you wish to copy a project from
2. Go to the project you wish to copy
3. Click on the triangle on the right-hand side of the "Copy" button and click "Copy to another client"
4. If the course has content that is from the local client library you will be asked to confirm that those will be copied to the other client as well.
5. Select which client you wish to copy the template to
6. All done!

The screenshot shows the Learnifier interface for a project titled "Customer Success Playbook". The page includes a navigation bar with options like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below the navigation, there are tabs for Overview, Participants, Waitlist, Course Page, Events, Assignments, Details, Communications, Reports, and Settings. The main content area displays the project title (ADMIN) and course title (LEARNER) as "Customer Success Playbook". It also shows creation and update dates: "Created: Demo Ester Friday, July 1, 2022" and "Updated: Demo Ester Tuesday, June 20, 2023". A "Copy" button is visible, with a green arrow pointing to a dropdown menu that contains "Create template" and "Copy to another client". Below this, there is a "1 participants" section with a progress chart showing 1 participant. The chart includes categories: Not Started (0), In Progress (1), Completed (0), On Track (1), Overdue (0), Not Invited (0), Bounce Backs (0), and Project Errors (0). The status is "Ongoing". To the right, there is an "Awards" section with an "Attach" button and a table with columns for Name, Expires, and Type. The table contains one row: "Introduction to Learnifier", "6 months", and "Certificate". Below the awards, there is a "Next Course" section with an "Add Next Course" button.