

## 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 dashboard for a project titled "Customer Success Playbook". The dashboard includes a navigation bar with options like Dashboard, Projects, Users, Library, Reports, Automations, and Settings. Below the navigation bar, there are tabs for Overview, Participants, Waitlist, Course Page, Events, Assignments, Details, Communications, Reports, and Settings. The main content area displays the project title, course title, creation and update dates, and a "Copy" button with a dropdown menu. A green arrow points to the "Copy to another client" option in the dropdown menu. The dashboard also shows a "1 participants" section with a progress indicator, an "Awards" section with an "Attach" button, and a "Next Course" section with an "Add Next Course" button.

Learnifier Dashboard: Customer Success Playbook

PROJECT TITLE (ADMIN): Customer Success Playbook

COURSE TITLE (LEARNER): Customer Success Playbook

CREATED: Demo Ester Friday, July 1, 2022

UPDATED: Demo Ester Tuesday, June 20, 2023

Buttons: Edit course, Preview, Delete, Copy

Dropdown menu options: Create template, Copy to another client

Participants: 1 participant, STATUS: Ongoing

Awards: Attach

Next Course: Add Next Course