

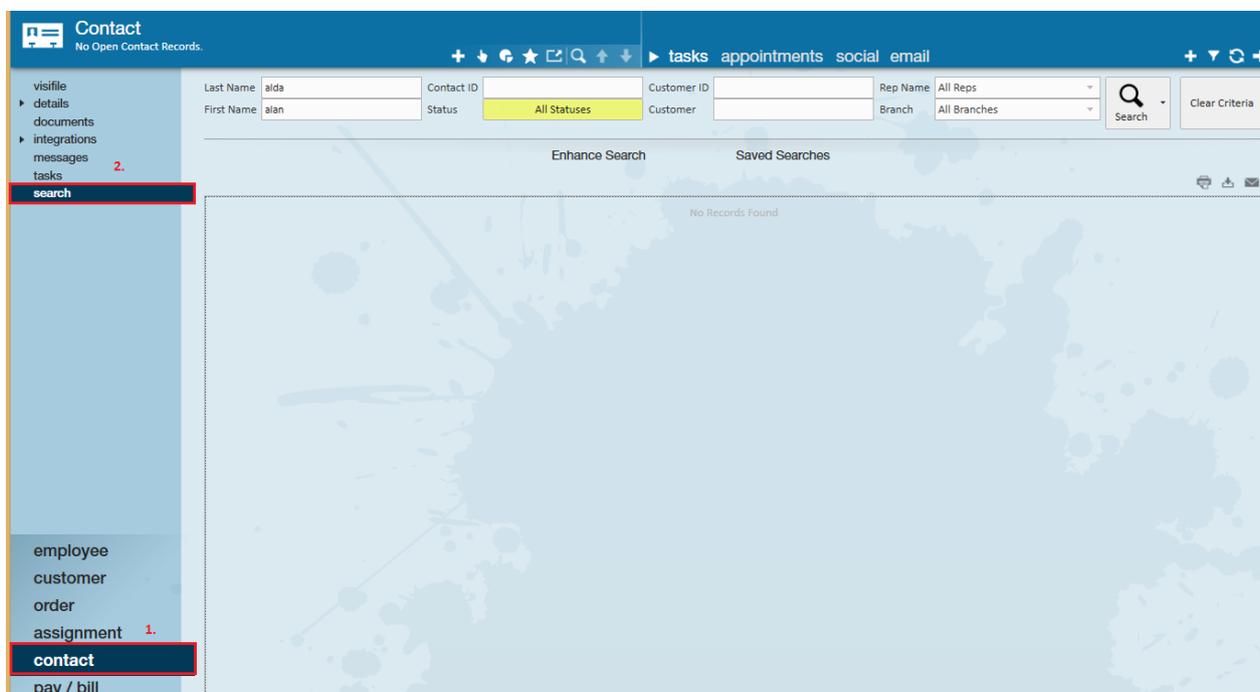
Enterprise - How to Copy an Employee Record to a Contact Record

Last Modified on 02/26/2025 3:25 pm CST

It is possible that temporary employees may be hired on by the client therefore they can possibly become a point of contact for that client. This document will walk users through successfully copying an employee record and creating a new contact record.

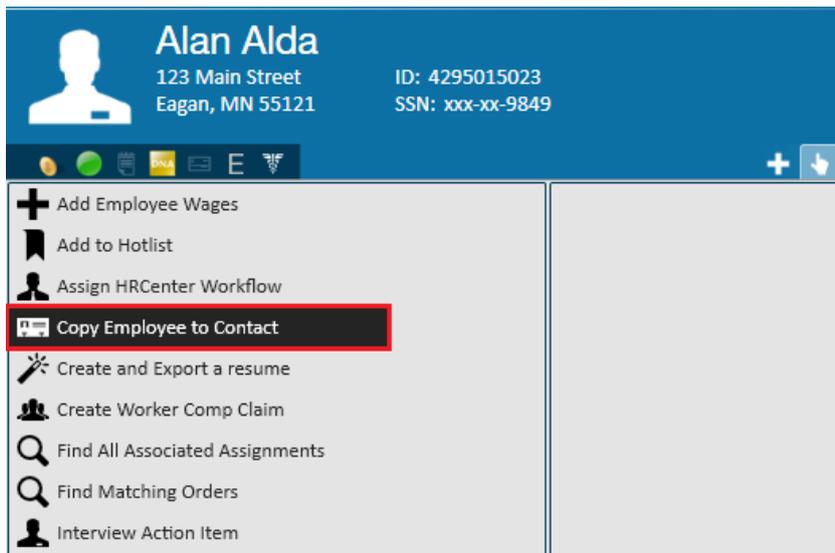
Step 1: Checking for duplicates

Before creating the contact record from an employee, run a contact search to verify there is no existing contact record for the employee you are working with and who has now become a buying influence, supervisor or decision maker. Select (1.) contact, (2) search:

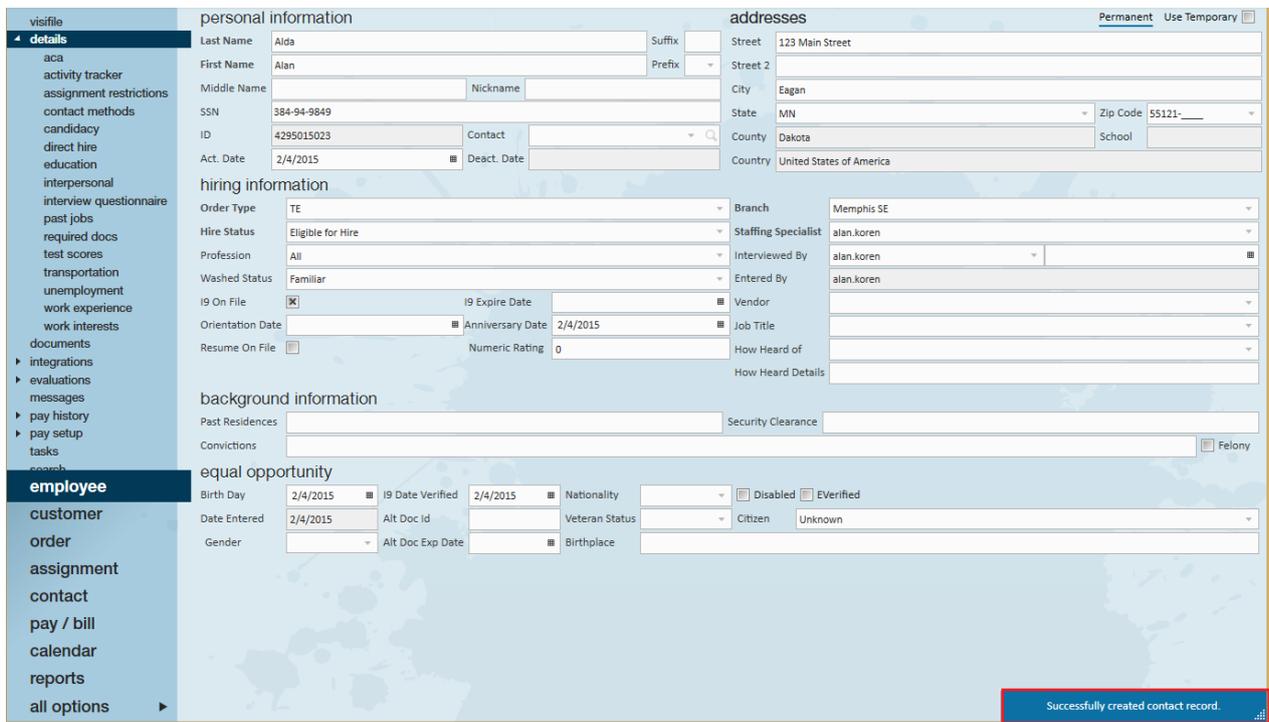


Step 2: Copying to Contact

If the employee doesn't exist as a contact, navigate to the related employee record and select *copy employee to contact* from the actions menu:



Once the copy to employee contact action is completed, the *successfully created contact record* message will appear in the bottom right hand corner of Enterprise:



Step 3: Reviewing information

To locate the newly created contact record, navigate to the details section of the employee record. Within the personal information section you will now see the newly created contact record, select the magnifying glass to jump to the contact profile.

Alan Alda
 123 Main Street
 Eagan, MN 55121
 ID: 4295015023
 SSN: xxx-xx-9849

No tasks to display

visifile
 details
 aca
 activity tracker
 assignment restrictions
 contact methods
 candidacy
 direct hire
 education
 interpersonal
 interview questionnaire
 past jobs
 required docs
 test scores
 transportation
 unemployment
 work experience
 work interests
 documents
 integrations

personal information

Last Name: Alda
 First Name: Alan
 Middle Name:
 Nickname:
 SSN: 384-94-9849
 ID: 4295015023
 Act. Date: 2/4/2015
 Deact. Date:
 Contact: **Alda, Alan** (highlighted with red box)

hiring information

Order Type: TE
 Hire Status: Eligible for Hire
 Profession: All
 Washed Status: Familiar
 I9 On File: I9 Expire Date:
 Orientation Date:
 Anniversary Date: 2/4/2015
 Resume On File: Numeric Rating: 0

Once in the contact record preview the address and contact information that transferred over automatically from the employee record. Within the notes section of the visifile you will see the details of the employee record recently copied.

Note Make any necessary changes needed to the contact record to ensure you have this person's work information on the contact record.

Alan Alda
 123 Main Street
 Eagan, MN 55121
 ID: 9587

No tasks to display for your current filter settings

visifile
 details
 documents
 integrations
 messages
 tasks
 search

contact snapshot

Title:
 Company Name:
 Email:
 Notes: **Record created from Employee Aident: 4295015023** (highlighted with red box)

Status: Active
 Branch: Memphis SE
 Date: 5/2/2016 10:08:00 AM

messages

Within the personal information section of the contact record, users may select the magnifying glass to jump back to the employee profile:

The screenshot displays a CRM profile for Alan Alda. The header includes the name 'Alan Alda', address '123 Main Street Eagan, MN 55121', and ID '9587'. A navigation menu on the left lists 'visifile', 'details', 'contact methods', 'documents', 'integrations', 'messages', 'tasks', and 'search'. The 'personal information' section contains fields for First Name (Alan), Last Name (Alda), Title, Nickname, Honorific, Birthday (02/04), and ID (9587). A dropdown menu is open for the ID field, showing 'Employee' and 'Alda, Alan'.

When working with this person from a customer/contact perspective, that information should now be logged into the person's contact record. When talking with them from an applicant or employee perspective, that information should be logged into the person's employee record.

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