

# How to Merge Employee Records

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[Merge Employees from TempWorks Software on Vimeo](#) .

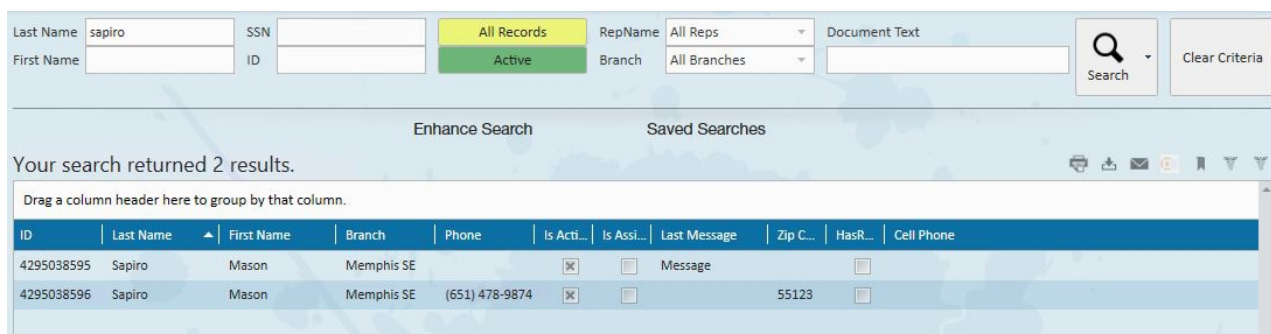
What can be done when there is a duplicate employee record in your database? Merge the two employee records together, effectively combining the two sets of data!

This document will walk through the merge process and its residual effects.

## The Merging Process:

If you find two of the same employees in your database, i.e. a duplicate record, (as we see below, the two employees in the search result have the same first & last name, phone number, zip code, etc. but two separate records) you will want to merge the two records together.

In the example below, both records have the same first and last name - you'll want to check each record individually to ensure you're combining information for the proper person.



The screenshot shows a search interface with the following details:

- Search criteria: Last Name: sapiro, First Name: (empty), SSN: (empty), ID: (empty), RepName: All Reps, Branch: All Branches, Document Text: (empty).
- Buttons: All Records (yellow), Active (green), Search (magnifying glass), Clear Criteria.
- Options: Enhance Search, Saved Searches.
- Results: Your search returned 2 results.
- Table with columns: ID, Last Name, First Name, Branch, Phone, Is Acti..., Is Assi..., Last Message, Zip C..., HasR..., Cell Phone.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone
4295038595	Sapiro	Mason	Memphis SE		<input checked="" type="checkbox"/>	<input type="checkbox"/>	Message		<input type="checkbox"/>	
4295038596	Sapiro	Mason	Memphis SE	(651) 478-9874	<input checked="" type="checkbox"/>	<input type="checkbox"/>		55123	<input type="checkbox"/>	

## Step 1: Locate the Secondary Record

To start the merge process, first navigate to the **Secondary record** - (the duplicate or wrong record). Merging from here will transfer all the data from this record into your preferred record, which is the record you wish to keep.

The screenshot displays a user interface for an employee record. At the top, the user is identified as Mason Sapiro (ID: 4295038595, SSN: [redacted]). The interface is organized into several panels:

- employee snapshot:** Contains fields for Name (Sapiro, Mason), Email Address, Desired Location, Hire Status (Eligible for Hire), and Rate Desired. There are also checkboxes for Resume Received, I9 On File, Active, and Assigned.
- messages:** A table with columns: Date, Action, Message, Rep, Contact, Customer, and Due.
 

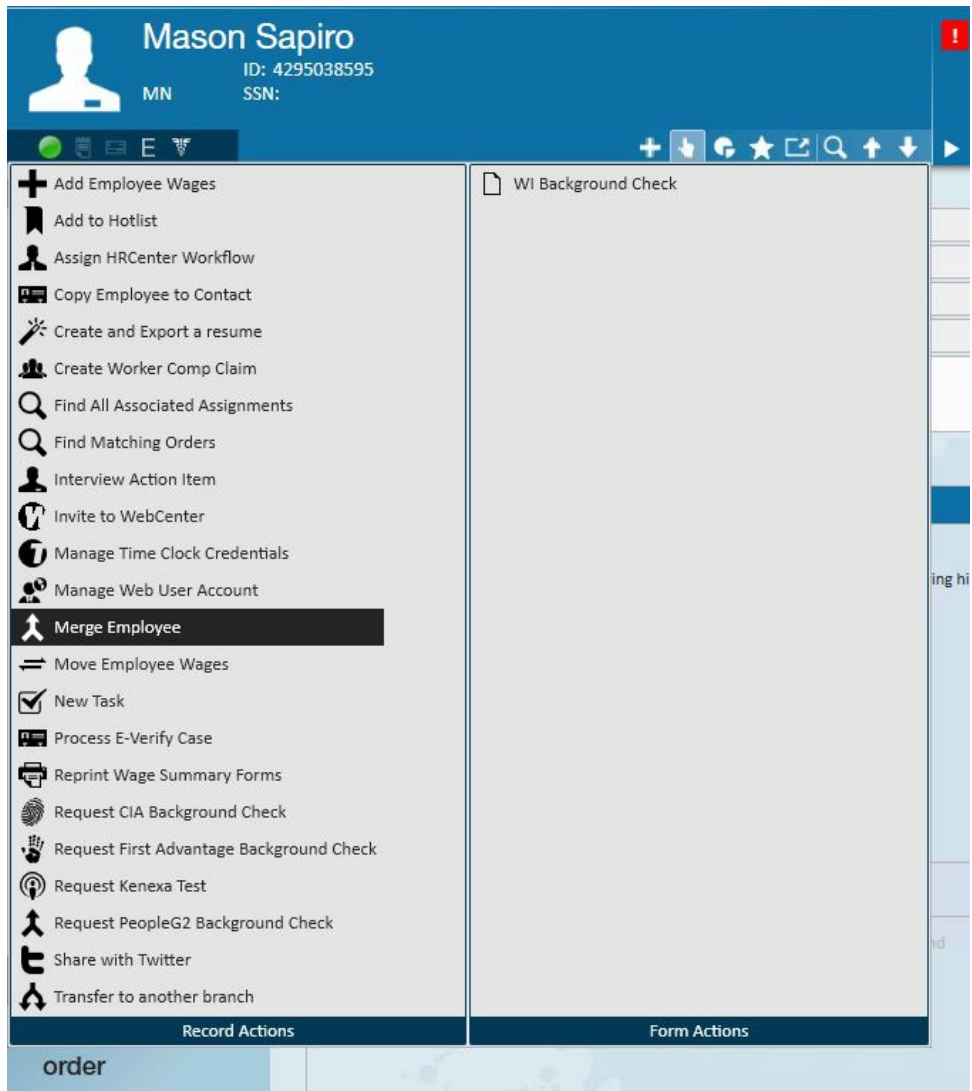
Date	Action	Message	Rep	Contact	Customer	Due
5/2/2017	Message	client would like to interview	sarah.rodgy			
5/2/2017	Phone Screen	after initial conversation would like to bring him in for an in...	sarah.rodgy			
5/2/2017	LVM	lvm re: resume on job board	sarah.rodgy			
- phone/email:** No Records Found.
- assignments:** No Records Found.
- interest codes:** No Records Found.

A left sidebar contains navigation options: visifile, details, documents, integrations, evaluations, messages, pay history, pay setup, tasks, search, employee, customer, order, assignment, contact, pay / bill, reports, and all options.

## Step 2: Start the Merging Process

On the secondary record, select the hand icon to expand the 'Actions Menu', then select 'Merge Employee'.

**\*Note-** If you don't see the 'Merge Employee' option, you likely don't have the security role (permission) to complete this action and will need to contact TempWorks Support for assistance.



Selecting 'Merge Employee' will open this window:

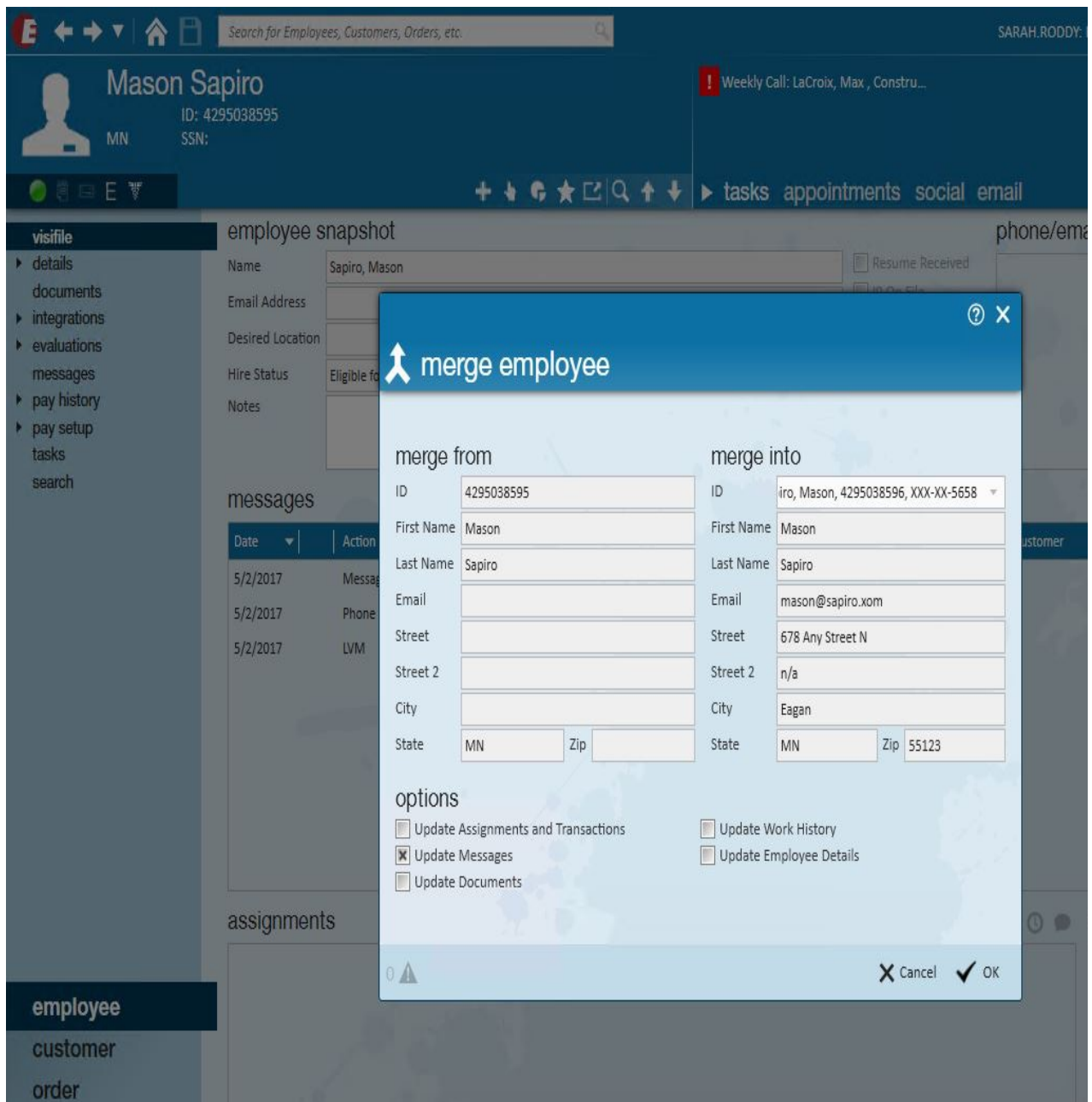
The screenshot shows a user interface for an employee profile. At the top, the user is identified as Mason Sapiro with ID: 4295038595 and SSN: MN. A notification bar indicates a 'Weekly Call: LaCroix, Max, Constru...'. The main content area is titled 'employee snapshot' and contains fields for Name, Email Address, Desired Location, Hire Status (Eligible), and Notes. A 'merge employee' dialog box is overlaid on the page. The dialog box has a title bar with a question mark and a close button. It is divided into two main sections: 'merge from' and 'merge into'. The 'merge from' section contains fields for ID (4295038595), First Name (Mason), Last Name (Sapiro), Email, Street, Street 2, City, State (MN), and Zip. The 'merge into' section contains fields for ID (with a red exclamation mark icon), First Name, Last Name, Email, Street, Street 2, City, State, and Zip. Below these sections are 'options' with checkboxes for 'Update Assignments and Transactions', 'Update Messages', 'Update Documents', 'Update Work History', and 'Update Employee Details'. At the bottom of the dialog box, there is a red warning icon with the number '1', a 'Cancel' button, and an 'OK' button.

Notice that the fields on the left already contain some of the information from the record you're currently viewing, the record we want to 'merge from'.

### Step 3: Complete the Merge into section

The fields on the right under 'merge into' will be blank, as you'll need to indicate which record to want to transfer the old information to - in the 'merge into' fields. You can select the desired record by expanding the dropdown or by starting to type the employee's name into the ID field.

**\*Note\*** Whichever record you select here will become the master record, as it will receive the data you wish to transfer from the wrong record.



**merge from:** The duplicate/secondary record. The employee record from which data will be copied and merged. When merging employees, the 'merge from' data fields will be moved to the 'merge into'.

**merge into:** The original/primary/desired record. The employee record where the data will be merged. 'merge into' data trumps 'merge from' data and thus nothing on the 'merge into' record will be overwritten.

#### Step 4: Things to know when merging employee records:

1. Merging Duplicate Details (Documents, Education, Past Jobs Data):

1. If the two records you are merging share some identical information regarding employee details, work history, or documents, etc., do not select the boxes where the duplicate information exists. If you do, the duplicate information will be copied and brought into the 'merge into' record post merge.
2. Following our example, we did check the 'Update Messages' box, to keep track of all activity associated with this employee.


## 2. Merging Custom Data:

- a. If the 'merge from' record *has* custom data and the 'merge into' record *does not* have custom data, the custom data **will** convert into the final record.

If the 'merge from' record *has* custom data and the 'merge into' record *also* has custom data, the custom data from the 'merge from' record **will not** convert into the 'merge into' record.

**\*Note\*** When merging two records, the old employee's SSN, EEOC information, Pay Set Up, and Electronic Pay information will not copy over to the new employee record.

## Step 5: Complete Merge

After selecting  OK the Employee records are immediately merged (including transaction data and pay history) and updated details can be viewed on both records -- important changes have taken place on both records.

Now, the record we started with will not contain its previous data like messages. Instead, notice the single message logged on the visifile indicating that this record was merged:

**Mason Sapiro**  
 ID: 4295038595  
 SSN: MN

Weekly Call: LaCroix, Max, Constru...

tasks appointments social email

**visifile**

- details
- documents
- integrations
- evaluations
- messages
- pay history
- pay setup
- tasks
- search

**employee snapshot**

Name: Sapiro, Mason

Email Address: [Redacted]

Desired Location: [Redacted]

Hire Status: Eligible for Hire | Rate Desired: [Redacted]

Notes: [Redacted]

Resume Received

On File

Active

Assigned

**phone/email**

No Records Found

**messages**

Date	Action	Message	Rep	Contact	Customer	Due
5/2/2017	Deact	Aident Merged from 4295038595 to 4295038596	sarah.rodgy			

**assignments**

No Records Found

**interest codes**

No Records Found

**employee**

- customer
- order
- assignment
- contact
- pay / bill
- reports
- all options

The messages that previously existed on this record were moved to our new record. The new record will contain the same message logged on the old record, indicating that this record was part of a merge.



Search for Employees, Customers, Orders, etc. SARAH.RODDY: High Tech Staffing

**Mason Sapiro**  
 678 Any Street N ID: 4295038596  
 Eagan, MN 55123 SSN: xxx-xx-5658

Weekly Call: LaCroix, Max, Constru...

tasks appointments social email

**visifile**

- details
- documents
- integrations
- evaluations
- messages
- pay history
- pay setup
- tasks
- search

**employee snapshot**

Name: Sapiro, Mason  
 Email Address: mason@sapiro.xom  
 Desired Location:  
 Hire Status: Web Pending Rate Desired  
 Notes:

Resume Received  
 In On File  
 Active  
 Assigned

**phone/email**

mason@sapiro.xom  
 (651) 478-9874

**messages**

Date	Action	Message	Rep	Contact	Customer	Due
5/2/2017	Message	Aident Merged from 4295038595 to 4295038596	sarah.rodgy			
5/2/2017	Message	client would like to interview	sarah.rodgy			
5/2/2017	Phone Screen	after initial conversation would like to bring him in for an in...	sarah.rodgy			
5/2/2017	LVM	lvm re: resume on job board	sarah.rodgy			

**assignments**

No Records Found

**interest codes**

Code

- Customer Service
- Customer Service Cashier
- Customer Service-Telemarketing

**employee**

- customer
- order
- assignment
- contact
- pay / bill
- reports
- all options

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