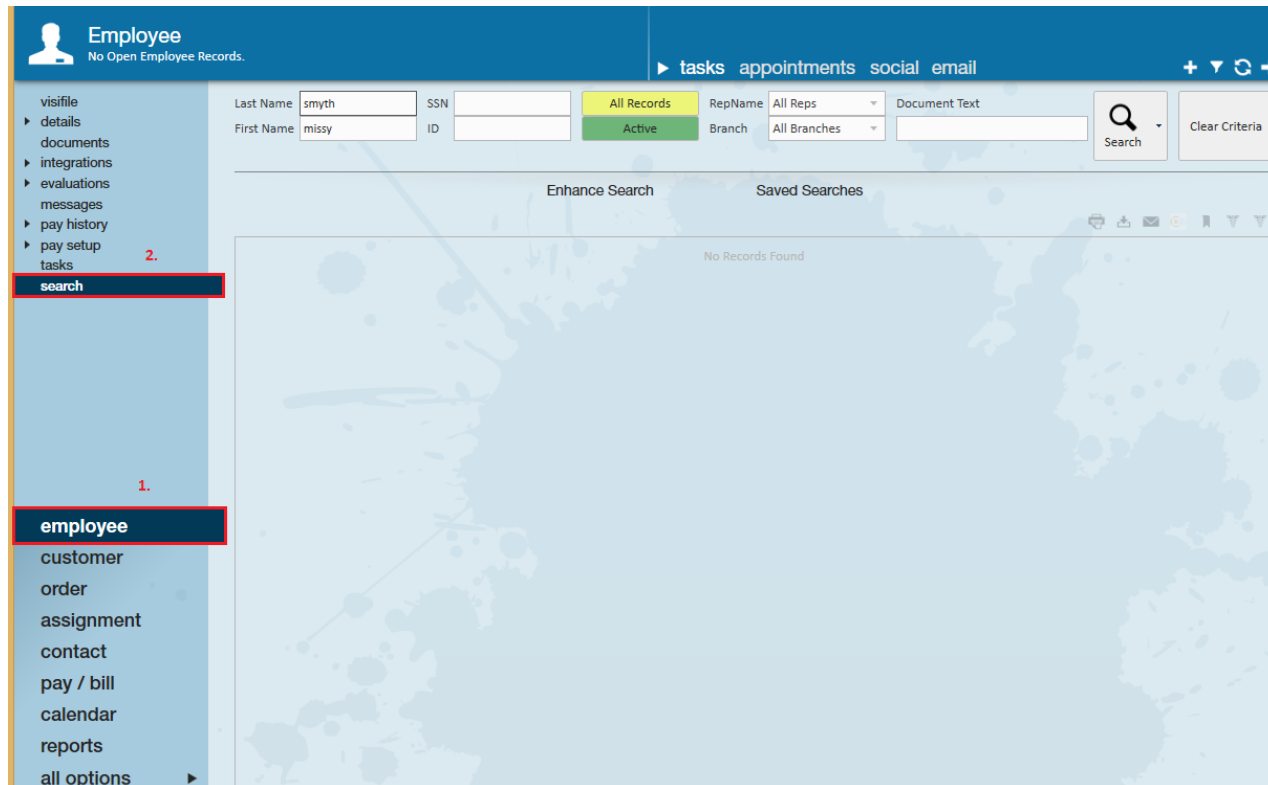


How to Copy a Contact to an Employee Record

Last Modified on 05/04/2018 8:55 am CDT

There may be times when you will need to create an employee record from a contact because the contact is looking for a new job or would like to move industries. This document will walk users through successfully copying a contact and creating an employee record for that contact.

Before creating the employee record from a contact, run an employee search to ensure the contact doesn't already exist as an employee. Navigate to the (1.) employee (2.) search dashboard:



If the contact doesn't exist as an employee, navigate to the contact record, expand the actions menu, and select to "copy contact to employee":

Search for Employees, Customers, Orders, etc.

Missy Smyth
 Stanley Inc. (Human Resources), Director of HR-
 765 Circle Pines (523) 236-5562
 Daisy, KY 41731 ID: 6329

Copy Contact to Employee

- Export To Outlook
- Manage Web User Account
- Manage WebCenter Account
- Merge Contact
- New Task
- Share with Facebook
- Share with Twitter
- View Customer

+ Add Message
 + Add Personal Call
 + Add to Contact Group

Date	Action
10/19/2015	Placed
10/19/2015	Placed
10/19/2015	Placed
10/19/2015	Placed
10/19/2015	Placed

Record Actions Form

employee
 customer
 order
 assignment
contact

personal call list

No Reco

When done correctly, users will see the successfully created employee record message in the lower right hand corner of their screen:

Missy Smyth
Stanley Inc. (Human Resources), Director of HR-
765 Circle Pines (523) 236-5562
Daisy, KY 41731 ID: 6329

Weekly Call: Baba, Ayano , Account...

tasks appointments social email

visifile
details
documents
integrations
messages
tasks
search

contact snapshot

Title Director of HR- Status Prospect
Company Name Stanley Inc. Branch Memphis SE
Email msmyth@hrstanley.com Date 5/7/2014 8:42:00 AM
Notes

phone/email
msmyth@hrstanley.com
(523) 236-5562

messages

Date	Action	Message	Rep	Contact
10/19/2015	Order Candidate	Candidate -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc
10/19/2015	Placed	Placed -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc
10/19/2015	Placed	Placed -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc
10/19/2015	Placed	Placed -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc
10/19/2015	Placed	Placed -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc
10/19/2015	Placed	Placed -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc
10/19/2015	Placed	Placed -- Stanley Inc. Comments:	mkramer	Smyth, Missy (Stanley Inc. , Human Resourc

employee
customer
order
assignment
contact
pay / bill
calendar
reports
all options

personal call list
No Records Found

contact groups
Name
Irving Warehouse Managers
AR/AP people

interest codes
Code
2nd Shift
Interpreter

Successfully created employee record.

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

Missy Smyth
Stanley Inc. (Human Resources), Director of HR-
765 Circle Pines (523) 236-5562
Daisy, KY 41731 ID: 6329

Weekly Call:

tasks a

visifile
details
contact methods
documents
integrations
messages
tasks
search

personal information

First Name Missy
Last Name Smyth
Title Director of HR-
Nickname
Honorific
Birthday
ID 6329 Employee Smyth, Missy

Once in the employee record preview the address and contact information that transferred over automatically from the contact record. Any additional information such as ssn, education, past jobs, etc. can be updated accordingly within the employee record.

Missy Smyth
765 Circle Pines
Daisy, KY 41731
ID: 4295026914
SSN:

Weekly Call: Baba, Ayano, Account...

tasks appointments social email

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

employee

customer
order
assignment
contact
pay / bill
calendar

personal information

Last Name Smyth Suffix
First Name Missy Prefix
Middle Name Nickname
SSN 000-00-0000
ID 4295026914 Contact Smyth, Missy
Act. Date Deact. Date

addresses

Permanent Use Temporary

Street 765 Circle Pines
Street 2
City Daisy
State KY Zip Code 41731-____
Country School
Country United States of America

hiring information

Order Type TE Branch Memphis SE
Hire Status Eligible for Hire Staffing Specialist lindsey.schneider
Profession Interviewed By
Washed Status Familiar Entered By lindsey.schneider
I9 On File I9 Expire Date Vendor
Orientation Date Anniversary Date Job Title
Resume On File Numeric Rating 0 How Heard of
How Heard Details

background information

Past Residences Security Clearance
Convictions Felony

equal opportunity

Birth Day I9 Date Verified Nationality Disabled Everified
Date Entered Alt Doc Id Veteran Status Citizen Unknown
Gender Alt Doc Exp Date Birthplace

To toggle back to the contact record associated with the employee click the magnifying glass within the contact field.

Missy Smyth
765 Circle Pines
Daisy, KY 41731
ID: 4295026914
SSN:

Weekly Call: Ba

tasks ap

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details

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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 Smyth Suffix
First Name Missy Prefix
Middle Name Nickname
SSN 000-00-0000
ID 4295026914 Contact Smyth, Missy
Act. Date Deact. Date

hiring information

Order Type TE
Hire Status Eligible for Hire
Profession
Washed Status Familiar
I9 On File I9 Expire Date
Orientation Date Anniversary Date
Resume On File Numeric Rating 0

Moving forward, when interacting with this person from a customer/contact perspective,

that information should be logged into the person's contact record. When talking with them from an applicant or employee perspective, that information should be logged within the person's employee record.

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