

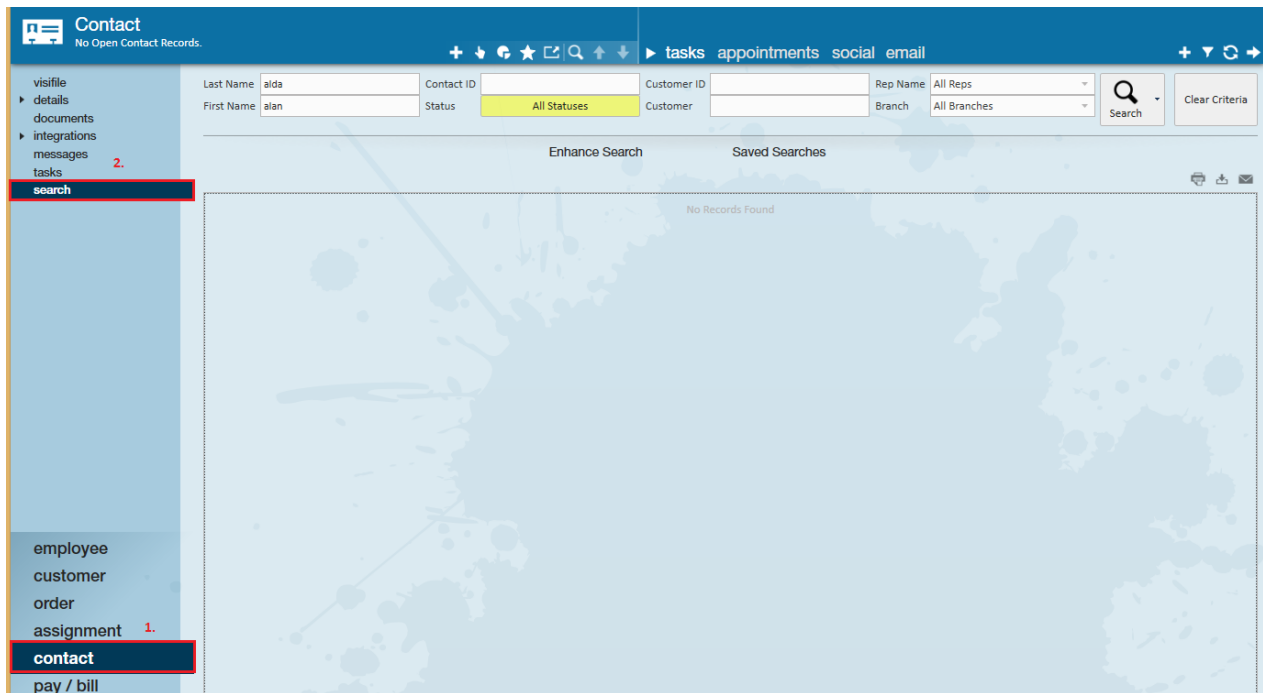
# Enterprise - How to Copy an Employee Record to a Contact Record

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.

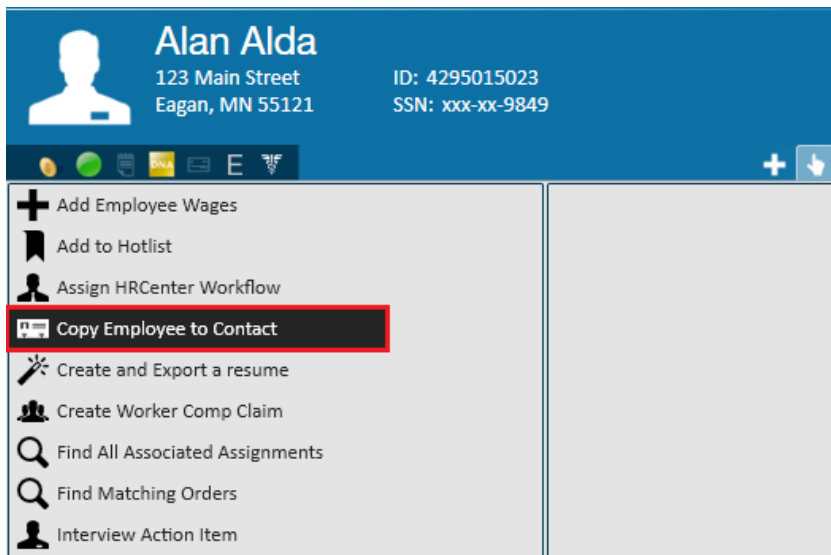
## Step 1: Checking for duplicates

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:

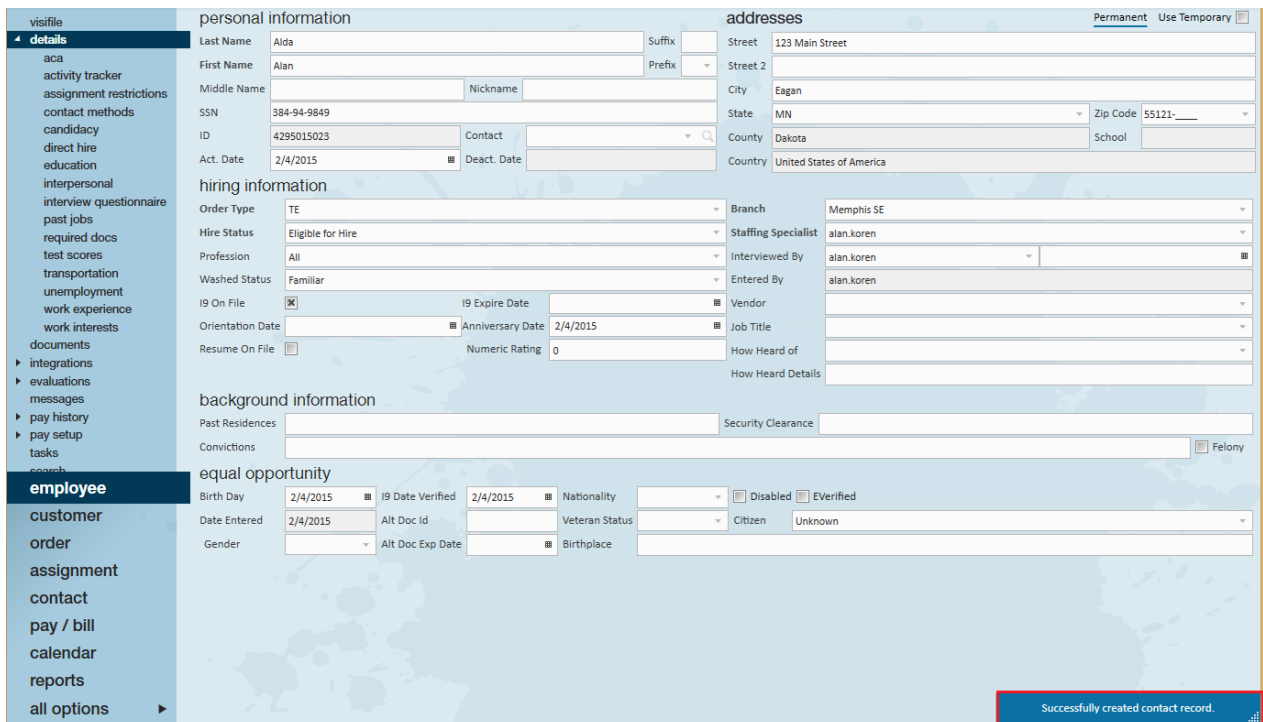


## Step 2: Copying to Contact

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:   
 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 the following fields: First Name (Alan), Last Name (Alda), Title, Nickname, Honoric, Birthday (02/04), and ID (9587). A dropdown menu is open for the ID field, showing 'Employee' and 'Alda, Alan'. The right side of the page shows a 'tasks' section with 'No tasks to display for you' and a 'appointments' section with 'CUST', 'Custor', 'Deapar', and 'Addre'.

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.

## Related Articles