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:

visifile	personal information a				addre	addresses				t Use Tempo	orary 📃		
 details 	Last Name	lda				Suffix	Street	123 Main S	Street				
aca	First Name	lan				Prefix .	Street 2						
activity tracker assignment restrictions	Middle Name			Nickname			City	Eagan					
contact methods	SSN	84-94-9849					State	MN			Zip Code	55121-	
candidacy	ID 4	295015023		Contact		v (County	Dakata			School		
direct hire	Act Date	4/2015/025		Deact Date			county	Dakota			School		
education	Act. Date	2/4/2015					Country	Country United States of America					
interpersonal	hiring infor	mation											
past jobs	Order Type	TE					- Branch	Branch Memphis SE					
required docs	Hire Status	Eligible for Hire					 Staffing 	Specialist	ecialist alan.koren				~
test scores	Profession	All					 Intervie 	wed By	alan.koren	-			
transportation	Washed Status	Familiar					- Entered	By	alan.koren				
unemployment	19 On File	×	l.	9 Expire Date			Vendor						
work interests	Orientation Date		# /	Anniversary Date	2/4/2015		■ Job Title						
documents	Resume On File			Numeric Rating	0		How He	ard of					
 integrations 							How He	ard Datails					
 evaluations 	How Heard Details												
messages background information													
 pay nistory pay setup 	Past Residences						Security	learance					
tasks	Convictions										Felony		
coarch	equal opportunity												
employee	Birth Day	2/4/2015 #	19 Date Verified	2/4/2015	Nationality		- Disa	bled 📃 EV	Verified				
customer	Date Entered	2/4/2015	Alt Doc Id		Veteran Status		- Citizen	Unkno	own				-
order	Gender	-	Alt Doc Exp Date		Birthplace								
assignment													
assignment													
contact													
pay / bill													
calendar													
roporto													
reports											_		_
all options										Successfi	ully created	contact record	۱. ا

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 55123	l ID: 42950 L SSN: xxx-)15023 xx-9849		N	o tasks to c	lisplay
👂 🥏 🗒 🔤 E 🕷		+	🔸 🗣 ★ 🛛	ב 0, ♦ ♦ ו	tasks	s ap
visifile	personal in	formation				đ
 details 	Last Name A	Ida			Suffix	
aca	First Name A	lan			Prefix	+
activity tracker assignment restrictions	Middle Name		Nickname	,		
contact methods	SSN 3	84-94-9849				
candidacy	ID 4	295015023	Contact Ald	la. Alan	~	a
direct hire	Act. Date 2	/4/2015 #	Deact. Date	-,		
education	biring infor	mation				
interview questionnaire		nation				
past jobs	Order Type	TE				*
required docs	Hire Status	Eligible for Hire				
test scores	Profession	All				
transportation	Washed Status	Familiar				Ŧ
work experience	19 On File	×	19 Expire Date			
work interests	Orientation Date		Anniversary Date	2/4/2015		Ħ
documents	Resume On File		Numeric Rating	0		
 integrations 						

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 Ald	a			No tasks to display for your current filter settings
123 Main Stru Eagan, MN	eet ID: 95 55121	;87 + ♦ G ★ Ľ	Q 🛉	↓ tasks appointments social en
visifile • details documents • integrations messages tasks search	Contact snap Title Company Name Email Notes	pshot Record created from Employee Aident: 4295015023	Status Branch Date	Active Memphis SE 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:

	Alan Ala	la	No tasks to d				
	123 Main St Eagan, MN	reet I 55121	D: 9587				
_			+ + + + + + + + + + + + + + + + + + +	appoir			
	visifile	persona	a information	CUS			
4	details	First Name	Alan	Custor			
	contact methods documents	Last Name	Alda	Custor			
•	integrations	Title		Depar			
	messages	Nickname		Addre			
	tasks	Honorific					
	Search	Birthday	02/04				
		ID	9587 Employee Alda, Alan 👻 🖓	2			

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