

Core - Merging Employees

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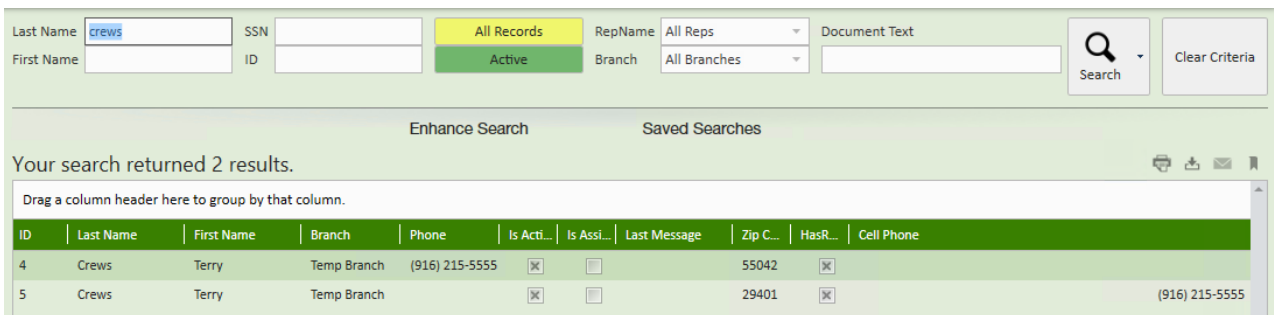
How to Merge Employee Records

While not a desirable situation, it is entirely possible that two records for the same employee may exist in a system. Enterprise allows us to merge records and the data that accompanies those records into a single record.

The Merging Process

If you find two of the same employees in your database, e.g. 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 are combining information for the proper person.



The screenshot shows a search interface with the following fields: Last Name (crews), First Name, SSN, ID, All Records (Active), RepName (All Reps), Branch (All Branches), and Document Text. A search button and Clear Criteria button are also visible. Below the search fields, there are links for Enhance Search and Saved Searches. The search results show 2 results:

Your search returned 2 results.

ID	Last Name	First Name	Branch	Phone	Is Acti...	Is Assi...	Last Message	Zip C...	HasR...	Cell Phone
4	Crews	Terry	Temp Branch	(916) 215-5555	<input checked="" type="checkbox"/>	<input type="checkbox"/>		55042	<input checked="" type="checkbox"/>	
5	Crews	Terry	Temp Branch		<input checked="" type="checkbox"/>	<input type="checkbox"/>		29401	<input checked="" type="checkbox"/>	(916) 215-5555

Step 1: Locate the Secondary Record

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

employee snapshot

Name: Sapiro, Mason

Email Address: [Redacted]

Desired Location: [Redacted]

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

Notes: [Redacted]

messages

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

phone/email: No Records Found

assignments: No Records Found

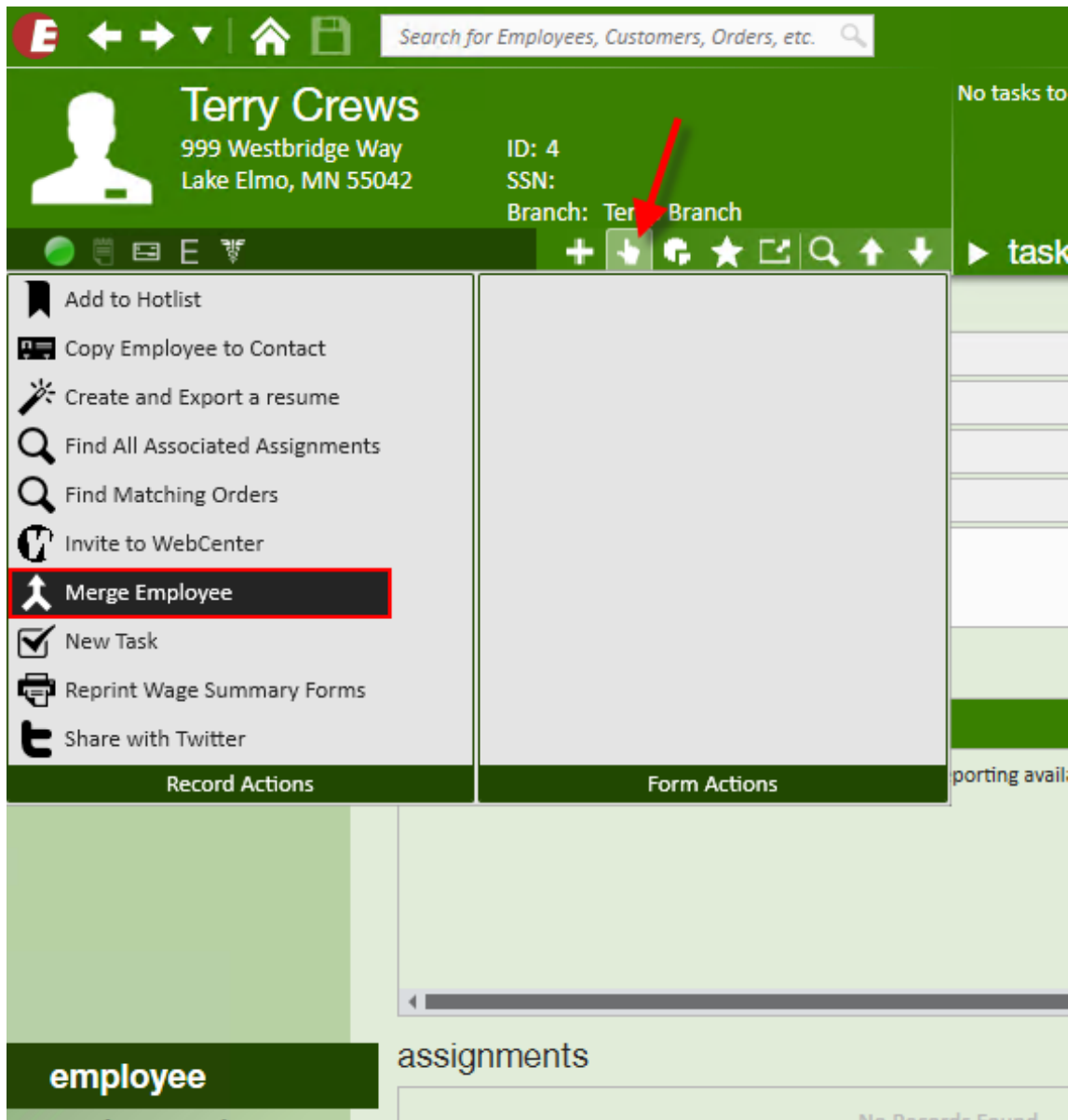
interest codes: No Records Found

employee

- customer
- order
- assignment
- contact
- pay / bill
- reports
- 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':



Selecting 'Merge Employee' will open this window:

merge employee

merge from

ID: 4

First Name: Terry

Last Name: Crews

Email: Terry.crews@gmail.com

Street: 999 Westbridge Way

Street 2:

City: Lake Elmo

State: MN Zip: 55042

merge into

ID: !

First Name:

Last Name:

Email:

Street:

Street 2:

City:

State: Zip:

options

Update Assignments and Transactions

Update Messages

Update Documents

Update Work History

Update Employee Details

1 !

Cancel OK

Notice that the fields on the left already contain some of the information from the record you are 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. You will need to indicate which record to want to transfer the old information to. You can select the desired record by expanding the drop-down or by typing 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 employee

merge from

ID: 4

First Name: Terry

Last Name: Crews

Email: Terry.crews@gmail.com

Street: 999 Westbridge Way

Street 2:

City: Lake Elmo

State: MN Zip: 55042

merge into

ID: Crews, Terry

First Name: Terry

Last Name: Crews

Email: Terry.crews@gmail.com

Street: 123 Westbridge Way

Street 2:

City: Charleston

State: NC Zip: 29401

options

Update Assignments and Transactions

Update Messages

Update Documents

Update Work History

Update Employee Details

Cancel OK

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):
 - 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.
 - Following our example, we did check the 'Update Messages' box to keep track


of all activity associated with this employee.

2. Merging Custom Data:

- 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

IS 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.rodny			

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
 I9 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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