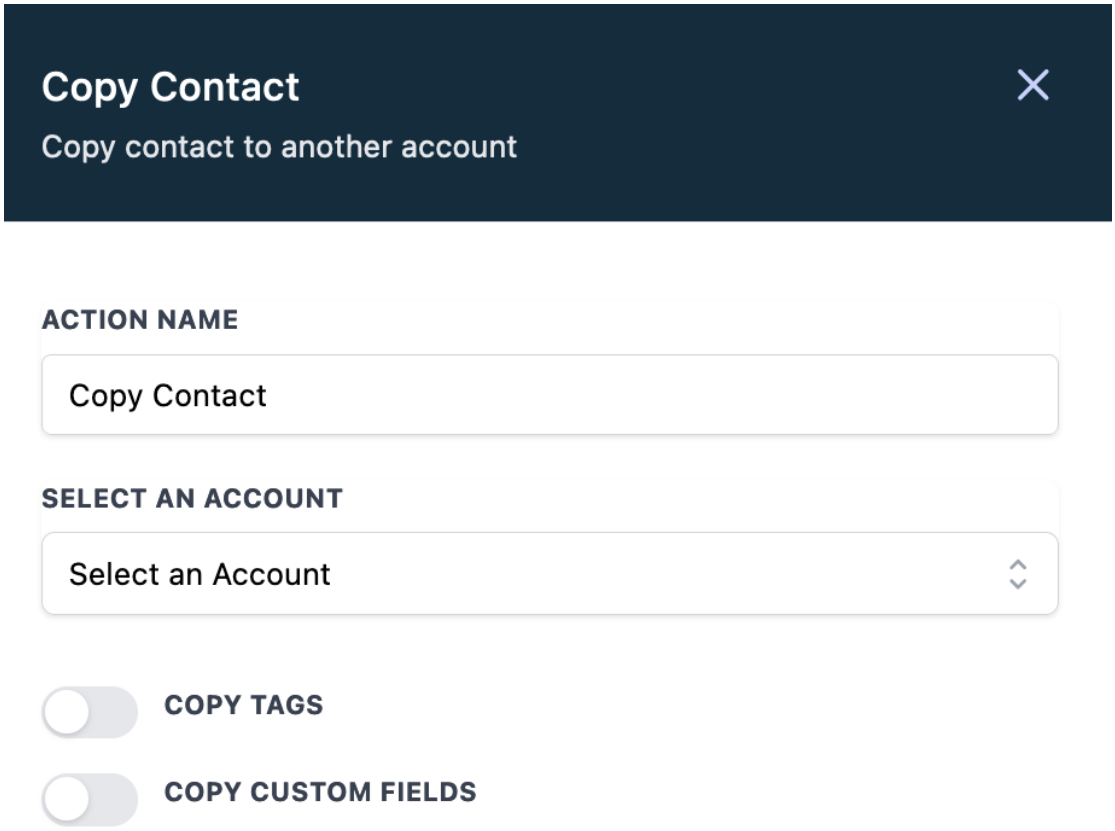
Copy Contact Action

Mavilyn Carlos - 2026-11-06 - Premium Workflow Actions (

> If you've opted to have the Premium Feature Upgrade, you now have access to additional Premium and AI features within your account. If you do not have the Premium and AI features and would like to consider an upgrade, please email hello@usekilo.com

Copy Contact enables copying contact to another account.

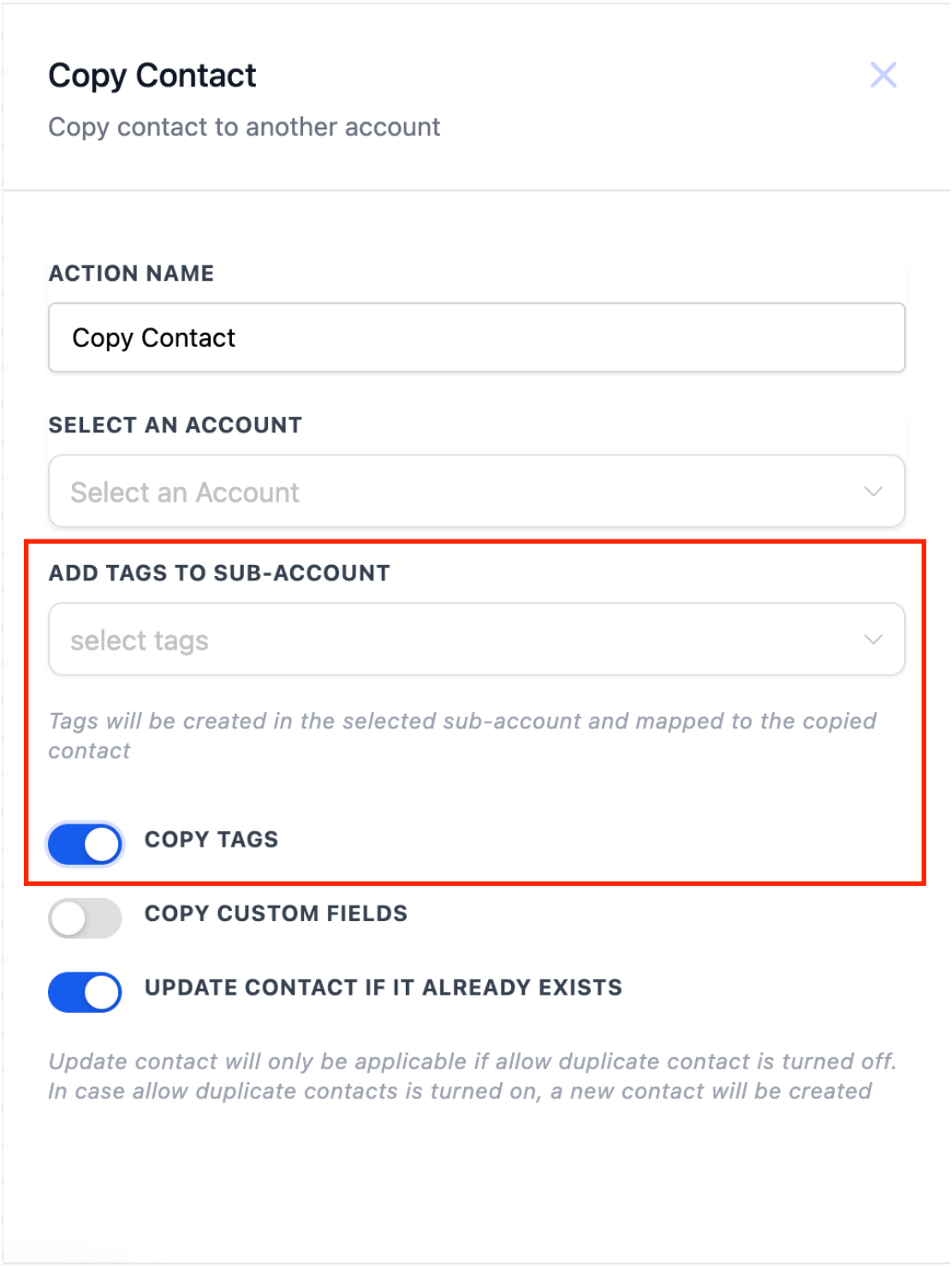


Select an Account

The contact will be copied to the selected account. Only the accounts that the logged in user has access to will be listed here.

Copy Tags

Organize your contacts effectively by adding multiple tags to newly copied contacts in your selected sub-account. You can choose tags from the source contact information or even create new ones manually.

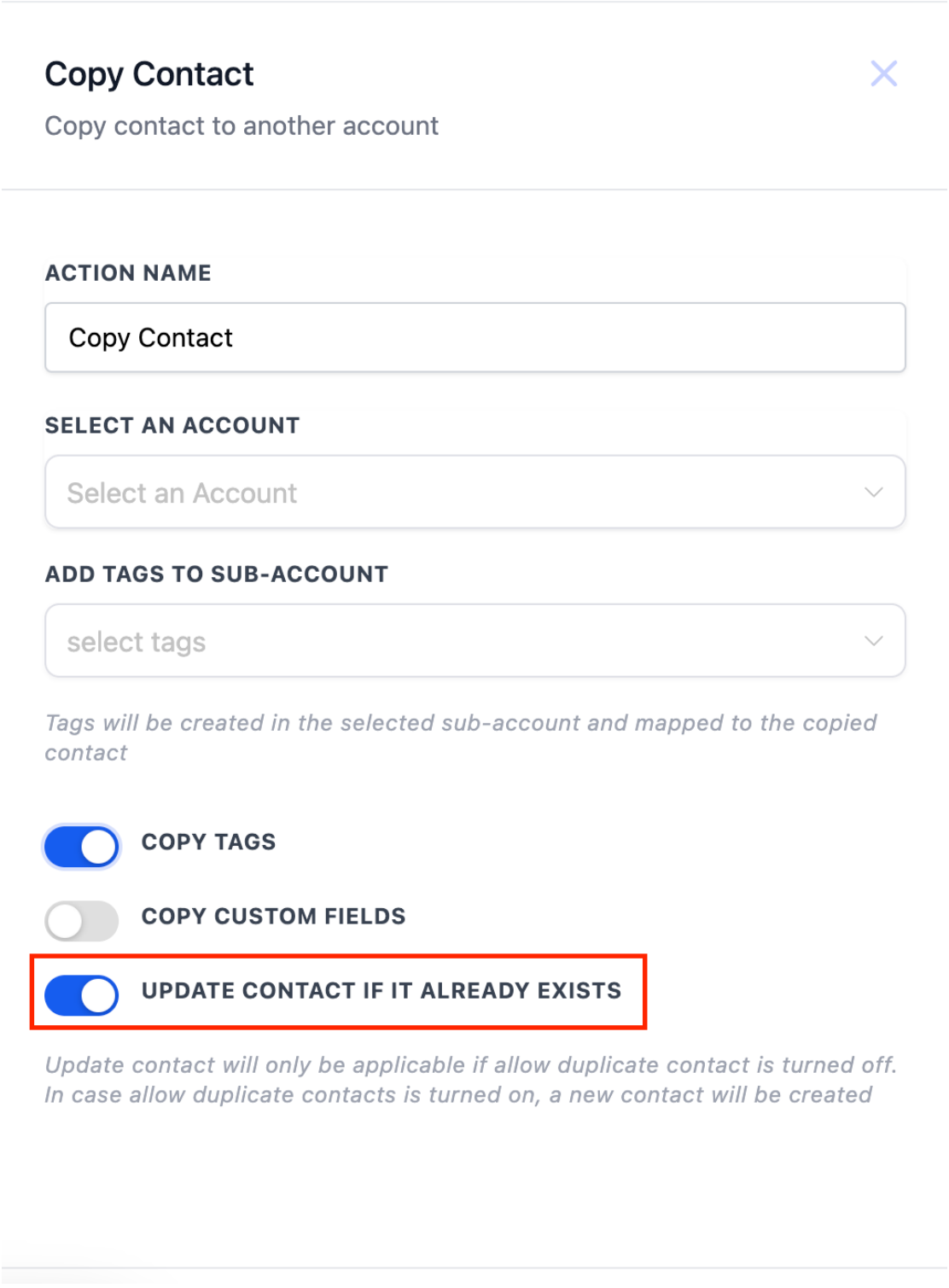


Copy Custom Fields

If enabled, contact custom fields will be copied to the selected account. The custom field value will be copied only if that field exists in the selected account.

Toggle : Update contact if it already exists

- If this is enabled and if the contact already exists in the selected sub-account then the contact will be updated in the sub account.
- If the contact is not existing in the sub account then new contact will be created.



Skip Copy Contact if Contact does not have Email and Name

If a contact does not have an Email or a Name then the contact won’t be copied and will be skipped.

What will be copied?

Below fields will be copied when Copy Contact action is used -

- Contact info
- General info
- Tags (Copy tags toggle must be turned on in the Copy contact action)
- Custom fields

  (Copy Custom fields toggle must be turned on in the Copy contact action and same custom field should be available in the sub account) (The custom field type should be same in both accounts)
- Contact DND info

What will not be copied?

Details such as Conversations, Activity, Notes, Tasks, Appointments, Documents and Payments will not be copied.