

Employabl - How-to Guide

About

This guide is designed to support the user navigating through the Employabl application, showcasing how the user can create records.

NB: This guide is tailored towards Salesforce Lightning Experience.

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Support

Please contact us at hello@insightablapps.com for any support questions or issues.

Employment History

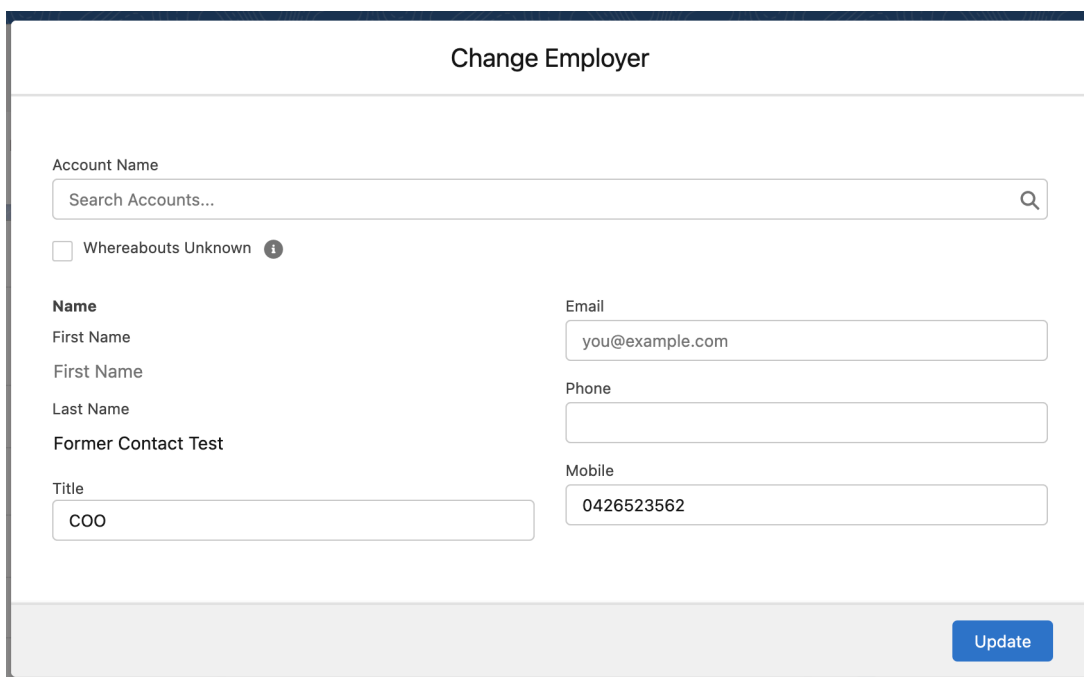
What is Employment History?

Employment history records keep track of a contact's employment history by automatically creating a record when a contact's title or account changes are made through editing the record or utilizing the "Change Employer" button.

How do I create an Employment History record?

Employment history records are created automatically by:

1. Editing the contact's record and making a change to either the standard account or title field
2. Using the "Change Employer" button found on the contact record



The screenshot shows a web form titled "Change Employer". At the top is a search bar labeled "Account Name" with the placeholder text "Search Accounts..." and a magnifying glass icon. Below this is a checkbox labeled "Whereabouts Unknown" with an information icon. The form is divided into two columns. The left column contains fields for "Name" (with sub-fields for "First Name" and "Last Name"), "Former Contact Test", and "Title" (which currently has the value "COO"). The right column contains fields for "Email" (with the value "you@example.com"), "Phone", and "Mobile" (with the value "0426523562"). At the bottom right of the form is a blue "Update" button.

- Selecting "Whereabouts Unknown" on update will change the contact's account record to the designated Whereabouts Unknown account in configuration settings. See installation guide for more details
- The email, phone, mobile and title field will default to the contact's current data but can be overridden
- Upon "Update" the contact record will be updated based on the inputted changes
- If updating to Whereabouts Unknown, the Contact's email, fax and phone standard opt out fields are checked

NB: If Account Engagement is installed, maintaining the Contact's email address is important to maintaining a connection between the Contact record and the Account Engagement Prospect record. This ensures all Account Engagement activities are retained with the Contact record.

3. Using the standard "New" record button on the Employment History related list

Employment History Page

 Employment History
TEST CONTACT2

EditDelete

Title	Employer	Start Date	End Date	Current Employer
CTO	TEST ACCOUNT	10/11/2022	10/11/2022	WHEREABOUTS UNKNOWN

Details

Contact

[TEST CONTACT2](#)

Employer

[TEST ACCOUNT](#)

Title

CTO

Summary

Account changed from TEST ACCOUNT to TEST ACCOUNT2

System Information

Created By

 [User User](#), 10/11/2022, 9:44 am

Last Modified By

 [User User](#), 10/11/2022, 9:44 am

Start Date

10/11/2022

End Date

10/11/2022

Duration (Months)

0

Employment History Number

EH-000012

Current Employer

WHEREABOUTS UNKNOWN

Related

 Employment History History (1)

Date:

10/11/2022, 9:44 am

Field:

Created.

User:

[User User](#)

Original Value:

New Value:

[View All](#)

Other Important Points

- Start date on an employment history record is based on the end date of the previous employment history record
- End date on an employment history record is defined as the current date but can be overwritten