

Employabl - Installation Guide

About

This guide is designed to support the installation of the Employabl application on the Salesforce platform. The following steps are critical to the successful installation of the application and the relevant steps to configure its functionality.

NB: All setup sets are in Lightning Experience.

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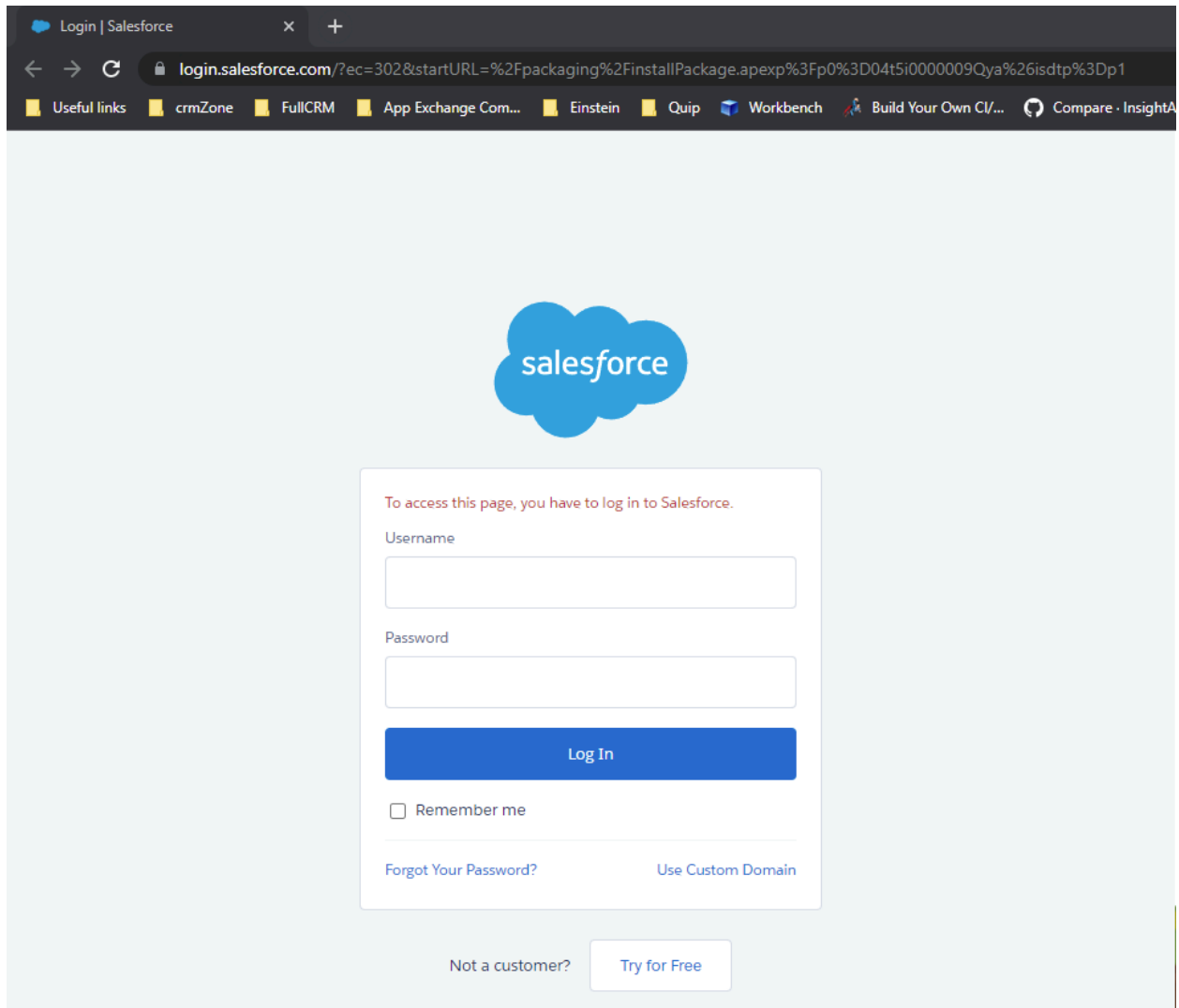
Support

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

Installation Steps

On installation it will ask you to log into Salesforce with your Salesforce credentials.

NB: If you are installing into a sandbox, replace the “login” part of the URL with “test” and then login with your sandbox credentials.



The screenshot shows a web browser window with the title "Login | Salesforce". The address bar displays the URL: `login.salesforce.com/?ec=302&startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04t5i0000009Qya%26isdtp%3Dp1`. Below the address bar, there are several navigation links: "Useful links", "crmZone", "FullCRM", "App Exchange Com...", "Einstein", "Quip", "Workbench", "Build Your Own CI...", and "Compare · InsightA". The main content area features the Salesforce logo (a blue cloud with the word "salesforce" inside). Below the logo, a message states: "To access this page, you have to log in to Salesforce." This is followed by a login form with two input fields: "Username" and "Password". Below these fields is a blue "Log In" button. Under the button is a checkbox labeled "Remember me". At the bottom of the form are two links: "Forgot Your Password?" and "Use Custom Domain". At the very bottom of the page, there is a link "Not a customer?" and a button labeled "Try for Free".

Once logged in you will be presented with the following screen. Ensure:

1. Install for Admins Only (you will be applying permission sets in the next steps to provide access to other non-admins)

Finally, press the Install button. If there are any errors on installation please get in contact and provide any error information.

Post Installation Steps

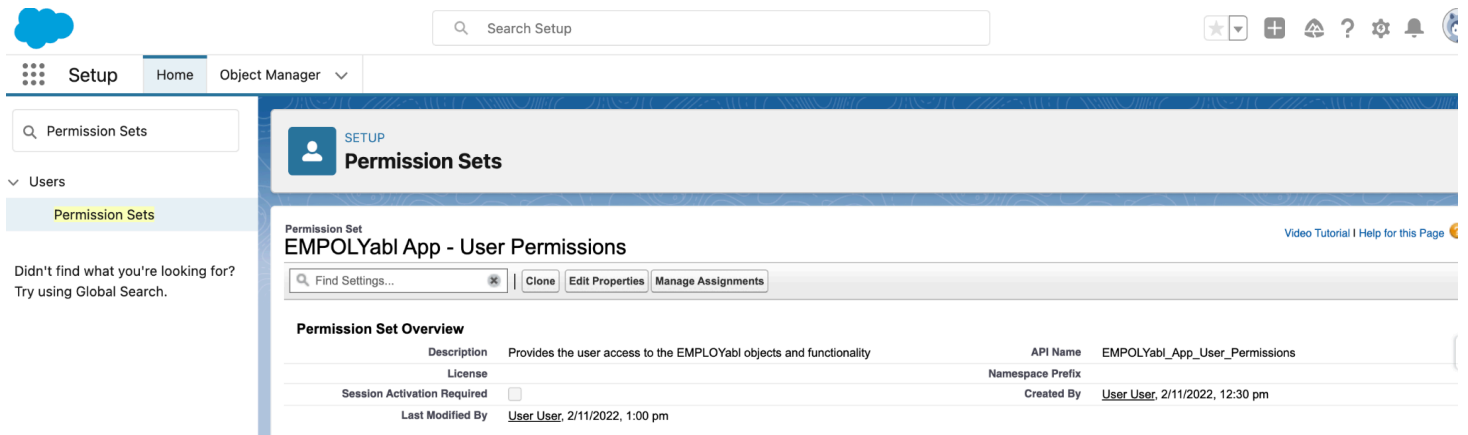
Assign Permission Sets

Permission sets have been created to license a Salesforce user with the Employabl application providing access to the objects, fields and automation. There is one permission set:

1. EMPLOYabl App - User Permission
 - This permission is to be assigned to any user who requires object and field level access to the Employabl data model and functionality

To assign a permission set:

1. Setup > Permission Sets
2. Select the Permission Set and press “Manage Assignments”



The screenshot shows the Salesforce Setup interface. The left sidebar contains the 'Setup' menu with 'Permission Sets' selected. The main content area displays the 'EMPLOYabl App - User Permissions' permission set. The 'Permission Set Overview' section includes the following details:

Field	Value
Description	Provides the user access to the EMPLOYabl objects and functionality
API Name	EMPLOYabl_App_User_Permissions
License	
Namespace Prefix	
Session Activation Required	☐
Created By	User User, 2/11/2022, 12:30 pm
Last Modified By	User User, 2/11/2022, 1:00 pm

3. Select the users who will be provided access to the application and assign

Assign Users

All Users

View: All Users [Edit](#) | [Create New View](#)

☐ Action	Full Name ↑	Alias	Role
☐ Edit	Chatter Expert	Chatter	
☐ Edit	Dempster, Michael	MDemp	CEO
☒ Edit	Rogers, comm	jroge	
☒ Edit	Rogers, Jack	jroge	Burlington Textiles Corp of America Partner Us
☐ Edit	SVP	sale	SVP, Sales & Marketing
☐ Edit	User, Integration	integ	
☐ Edit	User, Security	sec	

4. No "Expiration" is required

Assign “Run Flows” System Permission

There are a number of Salesforce® flows used in Employabl that require the running user to have the system permission “Run Flows”.

To enable “Run Flows” for a user, create a permission set by navigating to:

1. Setup > Permission Sets
2. Create a New Permission Set and call it “Run Flows Permission”.
3. Session Activation is not required, nor is attributing it to a license type
4. Upon save, click on the “App Permissions” > Edit
5. Select “Run Flows” checkbox under the “Flow and Flow Orchestration section” and then save

▼ Flow and Flow Orchestration		
Permission Name	Enabled	Description
Manage Flow	☐ ⓘ	Create and edit Flows.
Manage Orchestration Runs and Work Items	☐	Cancel and debug orchestration runs and reassign orchestration work items.
Run Flows	☒	In this org, run any active flow. In Experience Builder sites, run any active flow that's distributed with the Flow Lightning component.
View Flow Usage and Flow Event Data	☐ ⓘ	Unsupported. Use the View Setup and Configuration permission to let users access flow usage data and flow standard platform event data.

6. Follow the [Assign Permission Step](#) above to assign the permission set to all Meetabl users

Please see the following article for more details:

https://help.salesforce.com/s/articleView?language=en_US&id=sf.wcc_setup_add_run_flows_perms.htm&r=https%3A%2F%2Fwww.google.com%2F&type=5

Opt Out Field Permissions

Changing a Contact's Account record to "Whereabouts Unknown" via the "Change Employer" button on the Contact record will automatically set the standard Salesforce® opt out marketing fields to TRUE. This includes:

- Email Opt Out
- Do Not Call
- Fax Opt Out

By default, these fields are not visible to standard users. Ensure these fields are visible in order to avoid errors. Navigate to:

1. Setup > Object Manager > Contact > Fields & Relationships
2. "Select the relevant field above" and press the "Set Field-Level Security" button to update.

Contact Field

Email Opt Out

[Back to Contact Fields](#)

[Edit](#) [Set Field-Level Security](#) [View Field Accessibility](#)

Field Information

Field Label	Email Opt Out	Field Name	HasOptedOutOfEmail
Data Type	Checkbox		
Help Text			

Setup

Home

Object Manager

SETUP > OBJECT MANAGER

Contact

Details

Fields & Relationships

Page Layouts

Lightning Record Pages

Buttons, Links, and Actions

Compact Layouts

Field Sets

Object Limits

Record Types

Related Lookup Filters

Search Layouts

List View Button Layout

Hierarchy Columns

Triggers

Flow Triggers

Validation Rules

Set Field-Level Security

Email Opt Out

Save Cancel

Field Label	Email Opt Out
Data Type	Checkbox

Field-Level Security for Profile	☒ Visible	☐ Read-Only
Contract Manager	☒	☐
Marketing User	☒	☐
Minimum Access - Salesforce	☒	☐
Read Only	☒	☐
Salesforce API Only System Integrations	☒	☐
Solution Manager	☒	☐
Standard Platform User	☒	☐
Standard User	☒	☐
Standard User Plus Skip ID	☒	☐
System Administrator	☒	☐
System Admin Plus Skip ID	☒	☐

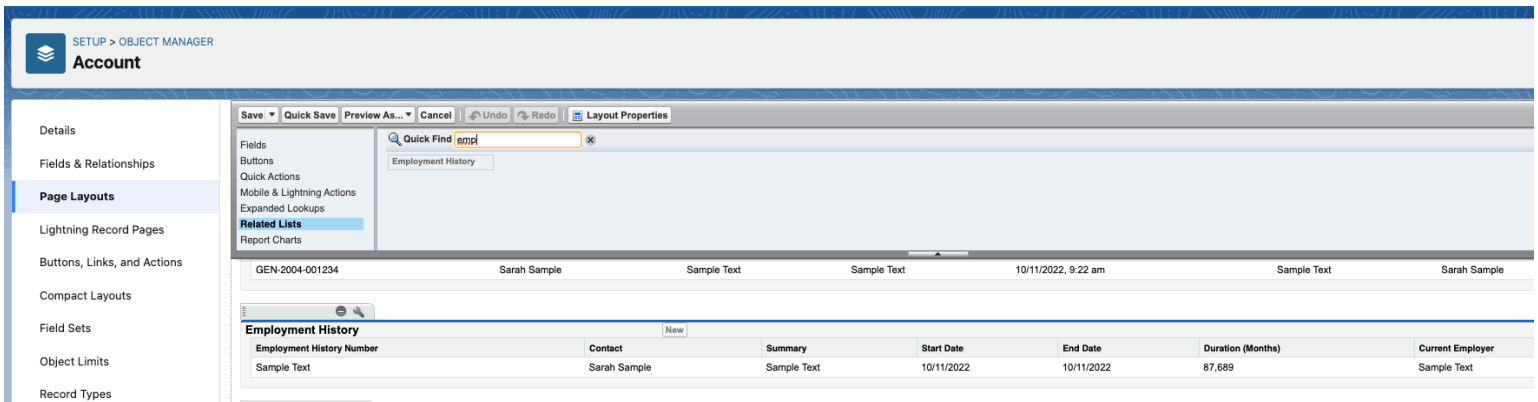
Page Layout Adjustments

Account / Contact Related Lists

The Employment History related list is required to be added to your account and contact layout where you want to record the contact's employment movements.

Navigate to your org's account or contact page layout and include the following related lists. For best results include the fields as displayed below:

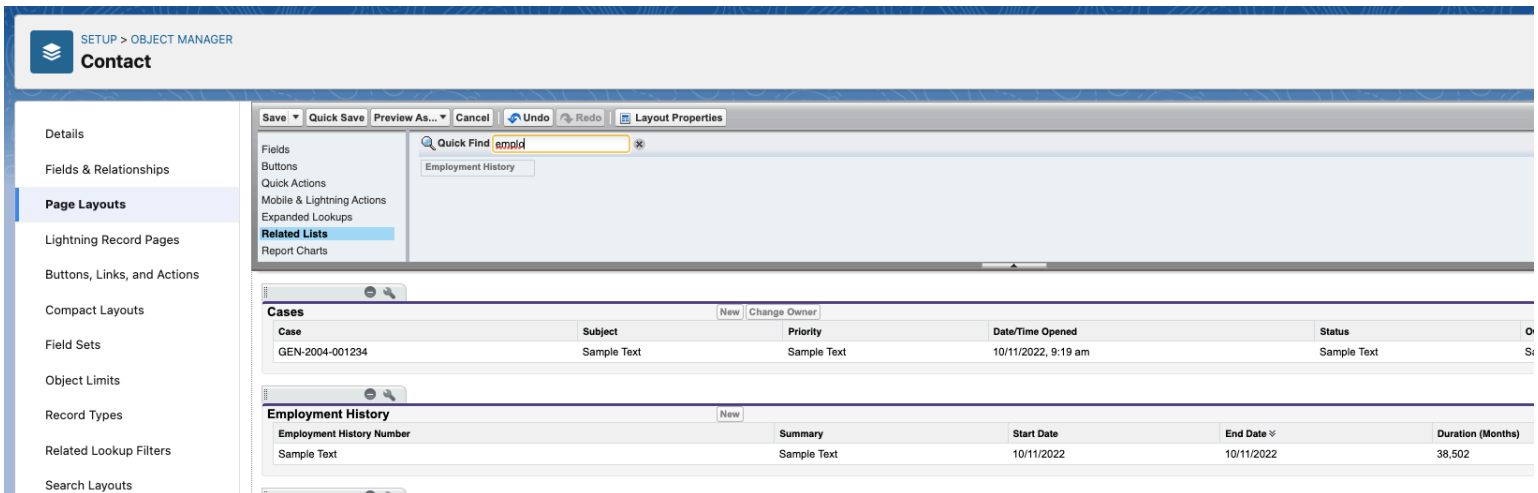
- Account
 - Employment History



The screenshot shows the Salesforce 'Account' page layout in Setup > Object Manager. The left sidebar lists various layout components, with 'Page Layouts' selected. The main area displays a sample record for 'GEN-2004-001234' with fields like 'Sarah Sample', 'Sample Text', and '10/11/2022, 9:22 am'. Below the record, the 'Employment History' related list is visible, containing one entry with the following data:

Employment History Number	Contact	Summary	Start Date	End Date	Duration (Months)	Current Employer
Sample Text	Sarah Sample	Sample Text	10/11/2022	10/11/2022	87.689	Sample Text

- Contact
 - Employment History



The screenshot shows the Salesforce 'Contact' page layout in Setup > Object Manager. The left sidebar lists various layout components, with 'Page Layouts' selected. The main area displays a sample record for 'GEN-2004-001234' with fields like 'Sample Text', 'Sample Text', and '10/11/2022, 9:19 am'. Below the record, the 'Employment History' related list is visible, containing one entry with the following data:

Employment History Number	Summary	Start Date	End Date	Duration (Months)
Sample Text	Sample Text	10/11/2022	10/11/2022	38.502

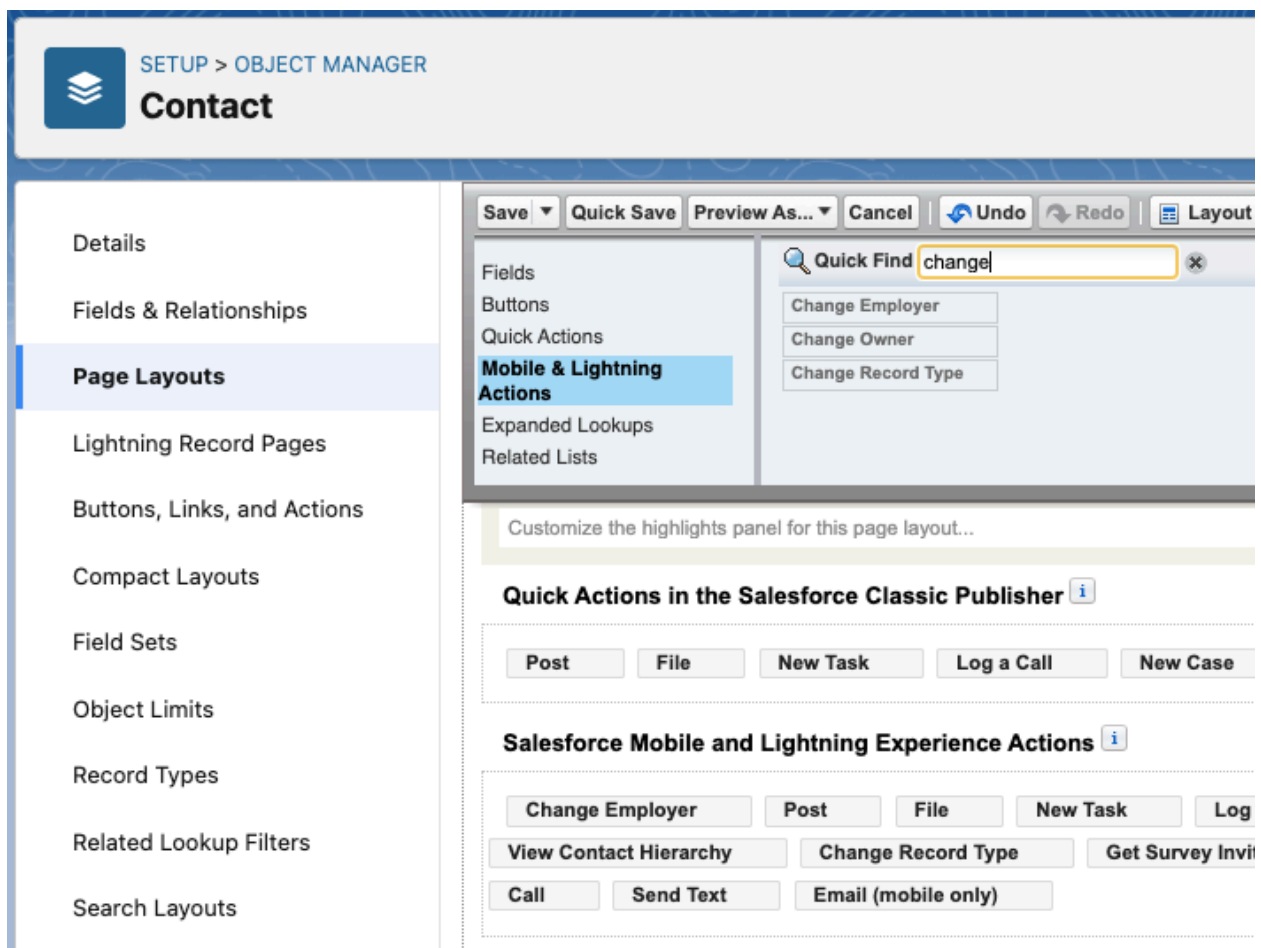
Ensure the following:

1. Change Owner button is removed from the related list using the “spanner” icon
2. The correct fields are displayed as per your requirements. For best results use the following fields:
 - a. Account - Employment History Number, Contact, Current Employer, Title, Start Date, End Date, Duration (Months)
 - b. Contact - Employment History Number, Employer, Title, Start Date, End Date, Duration (Months)

Change Employer Action

A custom action has been created to be added to the contact page layout to allow the user to quickly change the employer of a contact record. Upon save, an employment history record is automatically created.

To add the action to the page navigate to the contact page layout under Setup > Object Manager > Contact > Page Layouts > Mobile & Lightning Actions and search for the “Change Employer” action. Drag it down to the Salesforce Mobile and Lightning Experience Actions section.

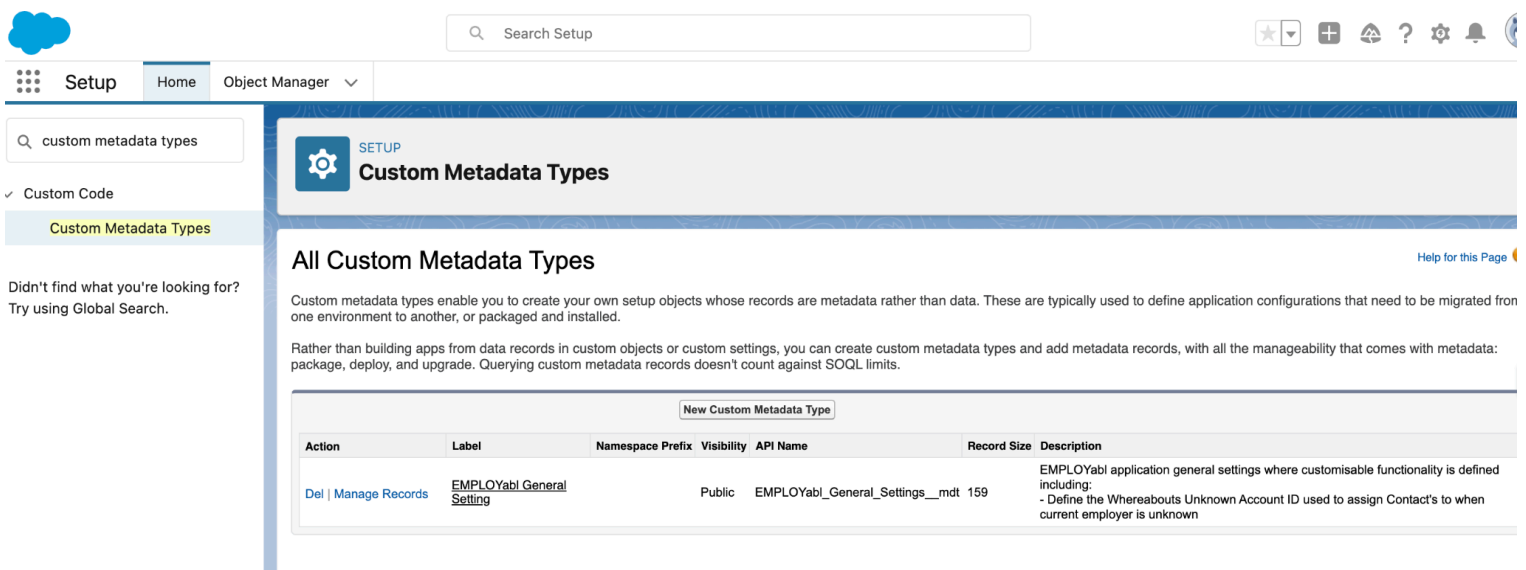


Employabl Configuration

A custom metadata type “EMPLOYabl General Settings” has been created to allow the administrator to define a Salesforce account Id to represent the “Whereabouts Unknown” account. Whereabouts unknown is used when the user does not know where the contact has moved to, but needs to update the contact record to move them off their current Account.

If a Whereabouts Unknown Account does not already exist, first create a new Account record.

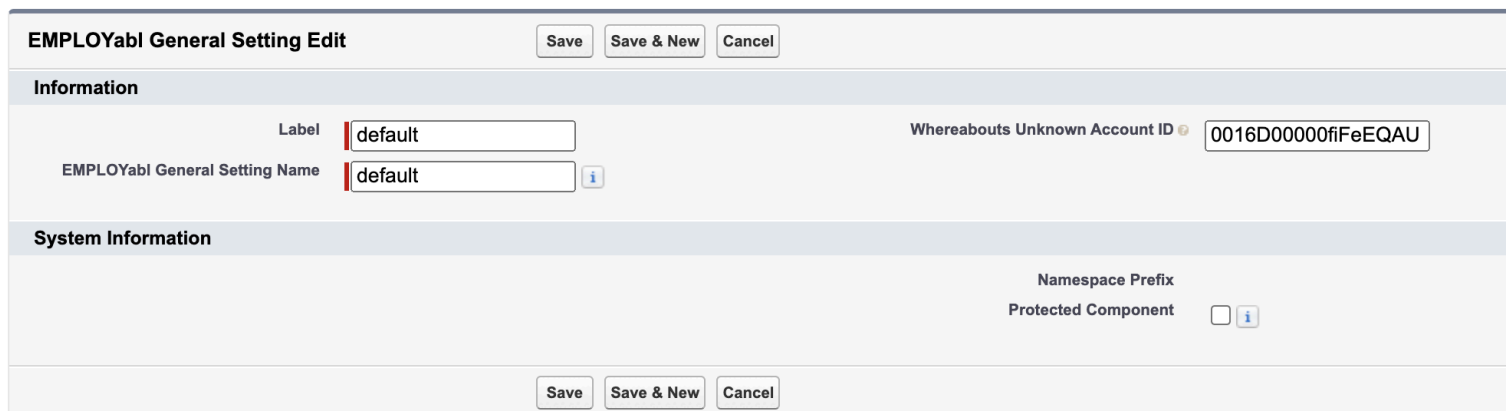
To update, navigate to Setup and in Quick Find, search for “Custom Metadata Types”. Then select “Manage Records” next to “EMPLOYabl General Settings”



The screenshot shows the Salesforce Setup interface. The left sidebar has a search bar with "custom metadata types" and a list of navigation items including "Custom Code" and "Custom Metadata Types". The main content area is titled "Custom Metadata Types" and contains a section "All Custom Metadata Types". Below this, there is a table with columns: Action, Label, Namespace Prefix, Visibility, API Name, Record Size, and Description. The table lists one record: "EMPLOYabl General Setting" with a "Manage Records" action. A "New Custom Metadata Type" button is visible above the table.

Action	Label	Namespace Prefix	Visibility	API Name	Record Size	Description
Del Manage Records	EMPLOYabl General Setting		Public	EMPLOYabl_General_Settings__mdt	159	EMPLOYabl application general settings where customisable functionality is defined including: - Define the Whereabouts Unknown Account ID used to assign Contact's to when current employer is unknown

EMPLOYabl General Setting



The screenshot shows the "EMPLOYabl General Setting Edit" form. It has a header with "Save", "Save & New", and "Cancel" buttons. The form is divided into sections: "Information" and "System Information". In the "Information" section, there are fields for "Label" (default), "Whereabouts Unknown Account ID" (0016D00000fiFeEQUAU), and "EMPLOYabl General Setting Name" (default). In the "System Information" section, there are fields for "Namespace Prefix" and "Protected Component" (checkbox). The form also has "Save", "Save & New", and "Cancel" buttons at the bottom.

NB: The Salesforce account Id can be found in the URL of the account record that represents the Whereabouts Unknown holding account.