

# Accounts and contacts

Manage job experience

Version 8.0



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# Table of Contents

Manage job experience

4

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PRODUCTS: **ALL CREATIO PRODUCTS**

Creatio stores the information about a contact's employment and job experience on the [ *Current employment* ] tab of the contact page.

To add information about a contact's current employment:

1. Go to the [ *Contacts* ] section and open the needed record.
2. Populate the following fields on the [ *Current employment* ] tab:

Position	Position held by the contact, for example, "Department manager."
Full job title	Exact job title, such as "Sales department manager." If you select a value in the [ <i>Job title</i> ] field, this field will be filled in with the selected value.
Department	Department of the company where this contact works, for example, "Sales" or "Marketing."
Role	The contact's influence in the decision-making process, for example, "Decision maker" or "Influencer."

The data on the [ *Current employment* ] tab is automatically synced to the [ *Job experience* ] detail.

This information includes the company name and a day when the contact started working at the company. The [ *Primary* ] and [ *Current* ] checkboxes are also selected. When a new record is added in the [ *Job experience* ] detail, the [ *Primary* ] and [ *Current* ] checkboxes are selected for this record, and the [ *Started on* ] field is filled in with the current date. The [ *Current* ] checkbox will be cleared for the previous place of work and the [ *Worked till* ] field will be filled in with the current date.

If you want to add more information about the current and previous employments of a contact, take the following steps:

1. Open the corresponding contact page and go to the [ *Current employment* ] tab.
2. Click **+** on the [ *Job experience* ] detail to add a new record.  
To change an existing record, select it in the detail list, click **+**, and select [ *Edit* ].  
Populate or edit the following fields on the page that opens:

Contact	Current contact. The field is non-editable.
Account	Employer of the contact.
Job title	Position held by the contact, for example, "Department manager."
Full job title	Exact job title, such as "Sales department manager."
Department	The department of the company where the contact works.
Role	Contact's influence in the decision-making process, for example, "Decision maker" or "Influencer."
Start date	Date when the employee was assigned to work in this position.
Due date	Date when the employee left the job.
Primary	The checkbox indicates that this place of work is the principal one.
Current	The checkbox indicates the company where the contact works at present.
Reason for job change	The reason why the employee decided to accept this position, for example, "Interesting work" or "Promotion."
Notes	Additional information about the contact's employment.

**Note.** A job record with the [ *Primary* ] and [ *Current* ] checkboxes set will display in the [ *Job experience* ] detail.

The data on the [ *Job experience* ] detail is synchronized with the information in the [ *Current employment* ] field group. If either of the [ *Primary* ] and [ *Current* ] checkboxes is cleared for a record in the [ *Job experience* ] detail, the data about the place of work will be automatically cleared in the [ *Current employment* ] field group. When a record with the selected [ *Primary* ] and [ *Current* ] checkboxes is modified, the data in the [ *Current employment* ] field group is updated automatically. If you select the [ *Primary* ] checkbox for another record in the [ *Job experience* ] detail, the checkbox will be cleared automatically.