Creatio Academy

Create an employee

Create a new employee

Version 7.17

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PRODUCTS: ALL CREATIO PRODUCTS

A new record in the [*Employees*] section is created based on an existing contact. The employee's page will pull information such as personal data, contact and address information, significant events, and career changes from their respective contact page. Records can be imported from Excel or added manually.

To create a new record in the [*Employees*] section **manually**:

1. Go to the [*Employees*] section and click the [*New employee*] button.
2. In the opened window, fill in the following fields:
   a. [*Contact*] – a Creatio contact based on which an employee record will be created. The field is required.
   b. [*Job title*] – employee's job title, for example, "Department manager."
   c. [*Full job title*] – exact job title, such as "Sales department manager."
   d. [*Department*] – company's organization structure unit where the employee works, for example, "Sales department."

   > **Note.** A list and hierarchical structure of departments is configured in the [*Organization structure items*] lookup. Read more in the "Getting started with the [*Employees*] section" article.

   e. [*Account*] – the name of the employer.
3. Click [*Save*].
   As a result, the following data will be automatically passed to the new employee page from the contact page, if they were specified:
   a. Communication options.
   b. Addresses.
   c. Noteworthy events.
   d. data about the job experience
   e. data about the user, their organizational and functional roles.
4. Save the page.

   Next time you edit the data on the employee page, the changes will also be reflected on the employee's contact page.

> **Note.** The data displayed on the action panel of the employee page is synchronized with the action panel of the respective contact page. For example, a task scheduled using the action panel on the employee page will also be available on the contact page.

Populate the employee profile

To add or edit the general information about an employee:

1. Go to the [*Employees*] section and open the needed record.
2. Populate the following fields:

Photo	Employee’s photo. Photos are pulled from the corresponding contact pages. Owner photos can only be changed on the corresponding contact page.
Full name	First and last name of the employee. The field displays information from the contact page. If you change the name on the employee page, the data on the contact page will also be updated.
Position	Employee's current position (e.g. “Director” or “Head of Department”). The field is populated with the [*Employee jobs*] lookup values.
Full job title	The field is populated automatically – it duplicates the title selected in the [*Employee jobs*] lookup. If necessary, the title may be edited.
Organizational unit	Company’s organizational unit where the employee works. The field is populated with the [*Organization structure items*] lookup values. If the manager of the organizational unit is specified in the lookup, their data will be automatically displayed in the manager’s profile on the employee's page.
Account	The employer’s account name is specified in this field. You may only select the accounts with the “Our Company” type. If you update this field, the account field of the contact page will also be updated.
Business phone	Employee's business phone number. The field displays the [*Communication options*] detail value of the [*Contact info*] tab of the employee and contact pages.
Email	Employee's email address. The field displays the [*Communication options*] detail value of the [*Contact info*] tab of the employee and contact pages.
Birthdate	Employee's birth date. The field displays the [*Noteworthy events*] detail value of the [*Contact info*] tab of the employee and contact pages.
Gender	Employee’s gender. The field displays the value of the [*Contact info*] tab of the contact page. This field can’t be edited on the employee page.
Owner	The Creatio user who is the author of this record in the [*Employees*] section and maintains the information about this employee. The field is populated automatically once the record is created.

3. Verify the information about the manager of the employee. if the owner of the organizational unit is indicated in the [*Organization structure items*] lookup, their data will be automatically displayed in the owner’s profile on the employee's page. If the owner is not specified in the lookup, you can specify them manually, from the list

of employees.
After the [*Manager*] field is populated, the following fields will be populated automatically.

<table>
<tr><td>Photo</td><td>Photo of the contact owner. Photos are pulled from the corresponding contact pages. Owner photos can only be changed on the corresponding contact page.</td></tr>
<tr><td>Full name</td><td>First and last name of the owner The field group displays the data that is specified on the contact page. This field is non-editable.</td></tr>
<tr><td>Mobile phone</td><td rowspan="2">The field group displays the data from the contact page. This field can not be edited on the employee page.</td></tr>
<tr><td>Business phone</td></tr>
</table>

4. On the [*Attachments and notes*] tab, add more information about the employee, as well as attachments and links to the web resources related to the employee.

Add general employee information

The [*Contact info*] tab contains general contact information about the employee (contact and address data, noteworthy events, etc.). The data on the [*Basic information*] tab is synchronized with the corresponding data on the contact page. If you change the communication options or any other data, enter new information on the employee page, and it will also be displayed on the contact page.

Add a communication option

The [*Communication options*] detail contains the list of employee's communication options, as well as the list of the restricted communication channels. The detail displays the [*Communication options*] detail values of the contact page. If you change the communication options on the employee page, the data on the contact page will also be updated.

To add information on the detail fields, click + and select the needed option:

Business phone	Phone numbers can be used to contact the employee. Communication option types are defined when a record is added (you can change them later).
Mobile phone	
Home phone	
Skype	Skype account of the employee.
Email	Website and email addresses of the employee.
Web	
Facebook	Social network profiles of the employee. This field is populated by searching for the social network profile of the employee on a separate page.
Twitter	
Do not use email	Checkboxes indicate which communication options should not be used to contact the employee. For example, if a contact does not wish to receive SMS, select the [*Do not use SMS*] checkbox.
Do not use phone	
Do not use SMS	
Do not use mail	
Do not use fax	

Add address

The [*Addresses*] detail contains the list of all available addresses of the employee. The detail displays the [*Addresses*] detail value of the [*Contact info*] tab of the contact page.

To add information on the detail fields, click + and select the needed option:

Address type	Type of address of an employee, e.g. “Home” or “Work.” Defined when a record is added. You can change it afterward.
Address	Street, building number, and other details of an employee's address.
City	Employee location. The [*State/province*] and [*City*] fields are connected to the [*Country*] field. For example, the [*Country*] field will be populated automatically when you populate the [*City*] field. Similarly, if you enter a province in the [*State/province*], the [*Country*] field will be populated automatically. When you fill in the [*Country*] field, the [*State/province*] and [*City*] fields will display only those regions and cities, which correspond to the selected country. You can associate a region with a certain country in the [*States/provinces*] lookup, and associate a city with a country – in the [*Cities*] lookup.
Country	
ZIP	Postal code of an employee.

Add noteworthy events

The [*Noteworthy events*] detail contains the list of noteworthy events of an employee. The field displays the [*Noteworthy events*] detail values of the contact page.

To add information on the detail fields, click +, select the type of the noteworthy event and specify the date on the page that opens.

Validate the employee profile and roles

If an employee is a Creatio user, their information and roles are displayed on the [*User Account*] tab. Upon registering a new user account for an employee, all connected data will be displayed on the [*User account*] tab of the employee page automatically.

The user login and the [*Active*] checkbox on the [*User Information*] detail cannot be edited.

Edit the data on the [*Organizational roles*] and [*Functional roles*] details may be edited on the employee page. If edited, the data will be updated on the contact page as well.