

iTools Customizable Account Hierarchy

Lightning Ready

Pages dynamically style based on the current user interface. Works great in Lightning, Classic, and mixed environments.

100% Native

Built entirely on the Force.com platform. Enhances the native Salesforce records you already use.

Point & Click Admin

Lots of configuration options so the tools work best for your organization - and it's all point & click.

30 Day Free Trial

Try it absolutely free for 30 days with no obligation, no credit card, and no pesky salesperson.



iTools Customizable Account Hierarchy lets you create a comprehensive global view of a company and its subsidiaries. Simply pick and choose what information to display in the Account Hierarchy list to customize the view for your special needs. Standard and custom fields as well as fields from related objects can be displayed. An Account Hierarchy configuration is provided for all your Salesforce users, but can be customized by profile or personalized for individual users as needed. Clickable column headers let you quickly sort on any field.

With its tabbed interface, iTools Customizable Account Hierarchy brings together information from related Contact, Opportunity, Task, Event, Case, Contract and Custom objects in a single view. This makes it super easy to better analyze, manage and coordinate activities for an account and all its associated subsidiaries.

Completely Customizable

Easily configured to show just the most important information

- Choose just the tabs you want to include
- Choose just the fields you want on each tab
- Choose standard and custom objects
- Create configurations for specific profiles and/or individual users
- Expand/Collapse levels to more easily view organizations with large and deep hierarchies
- Quickly sort the view on any field with clickable column headers

Account Name	Type	City	Employees	# Locations	Total All Opp Amt.	Owner
United Oil & Gas Corp.	Customer - Direct	Chicago	145,000	955	\$295,000.00	Adam Adams
↳ UO&G Financial Services	Prospect	New York	2,300	1	\$340,000.00	Bob Roberts
↳ UO&G Oil & Gas US	Customer - Channel	London	24,000	34	\$270,000.00	Adam Adams
↳ UO&G Oil & Gas South America	Customer - Channel	São Paulo	17,500	36	\$670,000.00	Adam Adams
↳ UO&G Venezuela	Customer - Channel	Caracas	18,300	29	\$440,000.00	Adam Adams
↳ UO&G Brazil	Customer - Channel	Brasilia	11,050	16	\$200,000.00	Adam Adams
↳ UO&G Argentina	Prospect	Buenos Aires	35,250	47	\$370,000.00	Adam Adams
↳ UO&G Oil & Gas Singapore	Customer - Direct		3,000	6	\$180,000.00	Adam Adams
↳ UO&G Oil & Gas Exploration Services	Prospect	Houston	6,000	3	\$250,000.00	Adam Adams
↳ UO&G Drilling Institute	Prospect	Chicago	150	1	\$350,000.00	Bob Roberts
↳ UO&G Drilling Equipment	Prospect	New York	30,000	12	\$3.00	Adam Adams
↳ UO&G DE South America	Prospect	Rio de Janeiro	2,500	7	\$235,000.00	Adam Adams
↳ UO&G DE North America	Prospect	Denver	13,000	9	\$545,000.00	Adam Adams
↳ UO&G DE Europe	Customer - Channel	London	6,000	5	\$415,000.00	Adam Adams
↳ UO&G DE Asia	Prospect	Chicago	8,500	4	\$270,000.00	Adam Adams

Robust Filtering

Allow users to quickly narrow the list of accounts and related records

- Apply global filters for situations like inactive contacts or out of business accounts
- Define Tab Views to segment relevant information for specific use case displays
- Add Dynamic Tab Views that allow users to supply search criteria values on the fly
- Filters and Views available at the entire account family and individual tab level

Account View: Search by Region Search: Region equals [] Go!

Accounts Contacts Opportunities Tasks
View: C-Level Contacts

Accounts Contacts Opportunities Tasks Cases Contracts Former Employees Assets Feeds
View: Search by Size Search: Amount greater or equal [] Go!



Flexible Licensing

You only need to license those users that access iTools, not every Salesforce.com user.

Great Support

We pride ourselves on helping you be successful. Just check out our reviews on the AppExchange.

6 Tools, 1 Low Price

One low subscription price gives you access to all 6 tools plus our Configuration Manager. We also offer great discounts for non-profits and NGOs.

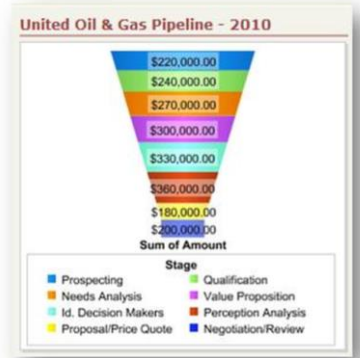
For subscription pricing and more information on any of the tools in the iTools suite, please visit us on the Web at: www.insitusoftware.com



Account Family Roll-ups

Easily create account family-based reports, charts, and dashboards

- Include the entire account-family no matter how complex the structure may be
- Leverage the Ultimate Parent information that is automatically maintained by iTools
- References the native Salesforce Parent Account field so there is no change to how you currently define your account relationships



Account Name	State/Province	Country	Web
ACME - Global HQ	NY	United States of America	
Duke Energy Corp. IHG	NC	United States of America	http://
Phillips Oil Corp.	TX	United States of America	
SIVOX Technologies Inc.	ON	Canada	http://
United Oil & Gas Corp.	IL	United States of America	http://

Account Name	Account Type	City	State	Country
Duke Energy Argentina	Prospect	Buenos Aires		
Duke Energy Brazil	Prospect	Brasilia		
Duke Energy UK	Prospect	London		
Duke Energy Venezuela	Prospect	Caracas		

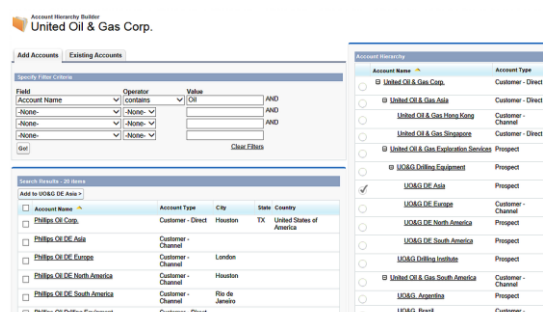
Find Opportunities

Use the Account Explorer to quickly find opportunities, contact, and other important information across account families

Administrator Friendly

Easy for any Salesforce.com administrator to set up and manage

- Configuration is all point-and-click
- Hierarchy Builder helps you easily manage and maintain your hierarchy structures
- Allow users to customize their own view or limit customization to just administrators
- Customize the feature set for individual and organizational needs – control what features your users are able to access
- Extensive installation and configuration documentation with step-by-step instructions



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