

iTools Employment Change Management

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 Employment Change Management lets you change a contact's account information without fear of losing valuable data. With iTools Employment Change Management, not only is critical task and event information retained in the right context, but valuable employment history is also automatically generated. See who has previously worked for an account as well as for what accounts a contact has worked – this is 'must have' information for cultivating business relationships.

iTools Employment Change Management also helps you stay on top of your open opportunities. Configure this iTool to send you an instant email notification whenever someone joins or leaves an associated account.

And, best of all, there are no complicated processes to follow - just update the contact's associated account wherever it is most convenient and let iTools Employment Change Management take care of the rest.

Contact			
Michelle Hamer			
+ Follow Edit Change Account			
Former Employers (3)			
ACCOUNT NAME	TITLE	END DATE	LENGTH OF SERVICE
Great Northern Oil Co.	CFO	8/1/2006	6 Years 5 Months
UO&G Financial Services	CFO	2/1/2000	7 Years 1 Months
Arthur Andersen	Partner	1/1/1993	12 Years 7 Months

Account			
Grand Hotels & Resorts Ltd			
Former Employees (3)			
LAST NAME	FIRST NAME	TITLE	END DATE
Barr	Tim	SVP, Administration and Finance	11/1/2008
Ripley	Tom	Regional General Manager	8/10/2010
Stumuller	Pat	HR Director	8/5/2016

- Leverage knowledge of past employment experience to foster new business relationships and help drive referrals
- With every employment change, automatically capture key professional experience data like job title, location and years of service to create accurate employment snapshots
- Make sure important business activity information is kept in the right context and with the right account when the associated contact changes employment. Use the iTool to eliminate the confusion and prevent certain data loss that would otherwise occur
- View an Account's former employees or a Contact's former employers as related lists, enabling you to quickly uncover connections that would otherwise be difficult to recognize
- Passively grow the employment history knowledgebase as contacts and accounts are updated

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



A Better Way to Change a Contact's Account

Our Change Account wizard lets you update a contact's associated account quicker and more accurately

CHANGE ACCOUNT
Kristen Akin

Change Account

New Account ! = Required Information

Employment Status

- Kristen is working for a different Account
- I do not know where Kristen is working but it is not at Aethna Home Products
- Kristen is retired
- Kristen is deceased

New Account

- Easy for user to deal with special employment situations such as retirement or not knowing where a contact went
- Shows only the “special” employment situations you want to support

- Easily specify a new business address by selecting from the new account's addresses or the address of other contacts at that account
- Automatically clears fields that always change when contacts change employment (e.g. Email)
- Configure which fields are always cleared when there is a change in employment
- Configure which fields are included in the the Other Account Related Information section
- Option to record all cleared / changed information in the Employment History record

CHANGE ACCOUNT
Kristen Akin

Change Account

Business Card Information ! = Required Information

Title

Phone

Fax

Email

Mailing Address

Street

City

State/Province

Postal Code

Country

Contact Address: Arthur Song, CEO

Other Account Related Information

Assistant

Asst. Phone

Department

Reports To

Start Date

Notify Stakeholders

iTools Employment Management can automatically send key stakeholders email notices when employment changes occur that could impact their accounts or deals.

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SOFTWARE

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