



iTools Employment Change Management Quick Start Guide

About This Guide

This Quick Start guide is designed for Admin users who have prior experience installing and configuring products from AppExchange. An abbreviated set of instructions is provided to quickly get you set up with iTools Employment Change Management. A more complete set of step-by-step instructions and supporting information can be found in the iTools Employment Change Management Configuration Guide available on our website or AppExchange listing.

About iTools Employment Change Management

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.

Before You Begin

The iTools Configuration Manager is the prerequisite package used for licensing and settings management of all iTools, including Employment Change Management. The iTools Configuration Manager must be installed and a license assigned to your account in order for you to install and configure iTools Employment Change Management.



Installing iTools Employment Change Management

1. Begin the installation of **iTools Employment Change Management** from AppExchange by using the following link:
<https://sites.secure.force.com/appexchange/apex/listingDetail?listingId=a0N30000001qVZEEA2>
2. Click on **Get It Now**.
3. Follow the standard AppExchange instructions including choosing your environment and verifying the Terms and Conditions of the iTools subscription.
4. When you are prompted to choose the security level, we recommend you select the **Grant access to all users** option, since iTools Employment Change Management is valuable to all users.
5. On Step 3 of the Package Installer, click on **Install** to complete the installation. When you have received confirmation that iTools Employment Change Management has successfully installed, continue with the next section to configure the iTool for your environment.

Configuring iTools Employment Change Management

1. Add the Former Employees Related List to the Account Detail Page
 - Go to **Setup | Customize | Accounts** and click the **Page Layouts** link.
 - In the Account Page Layouts list, click the **Edit** link in the Action column.
 - In the upper left area of the page, select the **Related Lists** item.
 - Find the item labeled **Former Employees** and drag it to the desired location on the layout.
 - After placing the related list on the layout, click on the small "**wrench**" icon to display its properties.
 - In the Related List Properties popup window, make the following changes:
 - Remove **Employment History: History ID** from the **Selected Fields** list.
 - Add the following fields to the **Selected Fields** list in this order:
 - Contact: Last Name
 - Contact: First Name
 - Employment History: Title
 - Employment History: Start Date
 - Employment History: End Date
 - Employment History: Length of Service



- Employment History: Location
 - Set the **Sort By** selection to **Contact Last Name** and select the **Ascending** option.
 - Click the **OK** button.
 - Click the **Save** button.
 - Click **No** in the message prompt so users' personal related list customizations are not overwritten.
2. Add the Former Employers Related List to the Contact Detail Page
- Go to **Setup | Customize | Contacts** and click the **Page Layouts** link.
 - In the Contact Page Layouts list, click the **Edit** link in the Action column.
 - In the upper left area of the page, select the **Related Lists** item.
 - Find the item labeled **Former Employers** and drag it to the desired location on the layout.
 - After placing the related list on the layout, click on the small "**wrench**" icon to display its properties.
 - In the Related List Properties popup window, make the following changes:
 - Remove **Employment History: History ID** from the **Selected Fields** list.
 - Add the following fields to the **Selected Fields** list in this order:
 - Account: Account Name
 - Employment History: Title
 - Employment History: Start Date
 - Employment History: End Date
 - Employment History: Length of Service
 - Employment History: Location
 - Set the **Sort By** selection to **Employment History: End Date** and select the **Descending** option.
 - Click the **OK** button.
 - Click the **Save** button.
 - Click **No** in the message prompt so users' personal related list customizations are not overwritten.



Congratulations!

You have successfully completed the steps required to install and configure iTools Employment Change Management. Keep reading for tips and information for a successful deployment of iTools Employment Change Management.

Tips and Information for a Successful iTools Deployment

iTools Settings

There are several iTools Settings available for you to customize the iTools Employment Change Management features. We encourage you to take some time to understand the purpose of each setting and verify that the current value is right for your organization. We strongly recommend you take particular note of the **SpecialAccountIds** iTools Setting. The **SpecialAccountIds** Setting and associated Special Accounts are used to classify a contact when its associated Account is unknown or not applicable. To take advantage of the Employment Change Management features associated with Special Accounts, you must create the Account(s) and update the SpecialAccountIds setting value accordingly. Refer to the **iTools Settings** section of the Employment Change Management Configuration Guide to learn about this important setting.

Learn More about iTools Employment Change Management

- The iTools Employment Change Management Configuration Guide provides step by step instructions, including screenshots, examples and explanatory text, for a more complete understanding of the features available. Please download and refer to the document to learn how to fully customize the iTool for your organization.
- Additional information can be found on our website at <http://www.insitusoftware.com> and our Get Satisfaction powered Community forum at <http://getsatisfaction.com/insitusoftware>
- Have a comment, suggestion or question? Email us at support@insitusoftware.com.



Explore other iTools in the Collection

- Learn more about each iTool and see how they can make a difference in your organization.
- Visit the AppExchange to install and explore any or all iTools including:
 - ➔ iTools Customizable Account Hierarchy
 - ➔ iTools Delegated Tasks Management
 - ➔ iTools Opportunity Status Monitor
 - ➔ iTools File Cabinet
 - ➔ iTools State/Country Validation
 - ➔ iTools vCard Creator