



Helping you build a better Salesforce

iTools for Salesforce CRM is a diverse set of powerful productivity, usability and data quality tools designed for real business needs.

iTools Customizable Account Hierarchy

Customize the Account Hierarchy page, including tabs for Contact, Opportunity, Case, Task and other related object data. Robust Filtering, Roll-up Support, Hierarchy Builder, Expand/Collapse, Export, Printable Views, and more.

Account Hierarchy
United Oil & Gas Corp.

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
United Oil & Gas Corp. Financial Services	Prospect	New York	2,300	1	\$340,000.00	Bob Roberts
United Oil & Gas U.S.	Customer - Channel	London	24,000	34	\$270,000.00	Adam Adams
United 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	\$260,000.00	Adam Adams
UO&G Argentina	Prospect	Buenos Aires	35,250	47	\$370,000.00	Adam Adams
United Oil & Gas Simsbury	Customer - Direct	Chicago	3,000	6	\$190,000.00	Adam Adams
United 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	\$0.00	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	\$645,000.00	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

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iTools Delegated Tasks Management

Manage and track the tasks you have delegated to others more efficiently. Assign tasks to Groups or Contacts. Get email notices when tasks are coming due, overdue, and completed.

Delegated Tasks

Due Date	Subject	Assigned To	Status	Name	Related To
9/11/2018	Next Year's Projections	Terry Hamer	In Progress		
9/7/2018	Apologize for Shipping Error	Terry Hamer	Not Started	John Bond	Pyramid Construction Inc.
9/10/2018	Send T-46 Generator Specs	Terry Hamer	In Progress		BTC Plant Generator
9/11/2018	Call Tim	Adam Adams	Not Started	Tim Barr	Grand Hotels & Resorts Ltd
9/18/2018	Send list of references	Adam Adams	Not Started		Grand Hotels Emergency Generators
9/28/2018	Call re iTools	Adam Adams	Not Started	Lauren Boyle	United Oil & Gas Corp.

iTools Employment Change Management

Automatically create employment history, alert opportunity owners, keep tasks and events from being lost, and more when contacts are added, deleted, or change employers.

Contact
Michelle Hamer

Former Employers (3)

ACCOUNT NAME	TITLE	END DATE	LENGTH
Great Northern Oil Co.	CFO	8/1/2006	6 Years
UO&G Financial Services	CFO	2/1/2000	7 Years
Arthur Andersen	Partner	1/1/1993	12 Year

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.



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

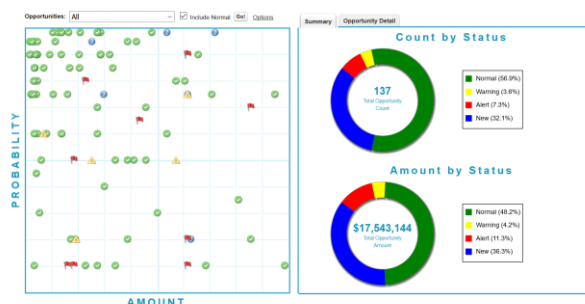
One low subscription price gives you access to all 6 tools plus our Configuration Manager. We also offer great discounts for non-profits and NGOs.

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



iTools Opportunity Status Monitor

Accelerate pipeline velocity, increase forecast accuracy & ensure sales team accountability. Monitors red flag conditions, sends alerts, provides Opportunity Scoreboard and more.



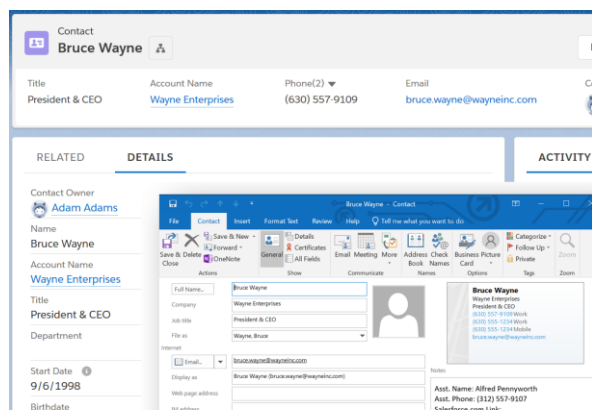
iTools State / Country Validation

Maintain complete, accurate and consistent state/country data for Accounts, Contacts, Leads, Contracts and Users. Provides ISO Code for use in reports, search and 3rd party integration.

iTOOLS STATE/COUNTRY VALIDATION		
Manage Address Content and Status		
View: Account - Billing Address		
ADDRESS STATUS	NUMBER OF ADDRESSES	ACTION
Address Not Validated	0	
Missing State and Country	20	Correct Addresses
Invalid State and Country	0	
Invalid Country	0	
Invalid State	0	Correct Addresses

iTools vCard Creator

Add Salesforce Contacts, Leads, Accounts and Users to Outlook or other contact manager with a single click. Optionally add custom field values and a Salesforce CRM link to the notes field.



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