iTools

Employment Change Management

Configuration Guide

Last Revised: October 25, 2018

Welcome

Thank you for choosing iTools for Salesforce by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce.com tools that will enhance your Salesforce experience. If you are currently evaluating our tools, we hope that you, like a growing number of Salesforce users, find them to be an invaluable addition to Salesforce.com.

This configuration guide assumes that the iTools Configuration Manager has already been installed and will lead you through the installation process and configuration of iTools Employment Change Management.

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.

Changing the account a contact is associated with was never easier with the Change Account wizard. iTools helps you users update employment related information easier and more accurately than ever before.

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.

Lightning Support

The iTools Employment Change Management fully supports the Salesforce.com Lightning user interface as well as the Classic user interface. All the user interface components have been designed to style themselves based on the user interface of the current user. This means you can easily use iTools in an all Classic org, an all Lightning org, or one with some users using Classic and some using Lightning. iTools will even support those users that switch between user interfaces depending on their task.

Installation and Configuration Overview

This guide is designed to lead you through the necessary installation and configuration steps for iTools Employment Change Management. It may look lengthy and complex, but its step-by-step instructions, along with its visual format, will ease you through the process. There are three basic parts to the process. To begin, this guide shows how to install the iTools Employment Change Management into your Salesforce environment. Second, it leads you through the process of deploying and configuring iTools Employment Change Management and each of its' feature sets. You do not have to activate and configure every feature of the tool so some sections in this portion of the guide can be skipped. We do encourage you to at least read the introduction to each feature so you become familiar with what iTools Employment Change Management can do to help your organization better manage the ever changing relationships between the contacts you know and the companies they work for. Finally, this guide explains how to properly apply Employment Change Management licensing. Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using any of the methods described in the *Help and Support* section at the end of this document.

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Version Updates

If you are an existing iTools Employment Change Management customer but haven't kept up with each new release, here is a brief review of the enhancements we have added to the product over the last couple of releases. If you would like to upgrade your current version to the latest release simple follow the installation instructions and install the latest version from AppExchange right over top of your current install. iTools knows when it needs to do an upgrade and will update you to the latest version without impacting your configuration or licensing. It's easy and for current subscribers its free!

New In Version 3.0/3.1

Support for the Salesforce.com Lightning User Interface: All the pages in Employment Change Management now style themselves dynamically depending on the user interface of the current user. iTools has always worked in Lightning but now it supports that fresh look and feel.

New In Version 2.14

Change Account Wizard: Changing the account a contact is associated with was never easier. The new Change Account wizard simplifies the selecting of special purpose accounts (Unknown Employer, Retired, Deceased) and contact information related to a new employer faster and more accurate. Your users will love it and the data will be more accurate!

Before You Begin

iTools are designed for use with Salesforce.com Professional, Developer, Enterprise, Unlimited, and Performance editions and their sandboxes. Installation into any other edition, including Team and Group Editions, is not supported.

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools Employment Change Management into any other supported edition, your user profile must include permission to Download AppExchange Packages and Manage Package Licenses. If your user profile is the standard System Administrator, you will, by default, already have these permissions.

In addition to the proper permissions, the iTools Configuration Manager version 5.0 or higher must be installed and a license assigned to your account.

Periodically Salesforce will change the user interface to improve the usability of the Salesforce application or the AppExchange marketplace. Many times, these changes only take effect when you enable an option in the **User Interface** section of Setup. This guide will attempt to reference navigational steps and screen shots using the latest version of the Salesforce user interface. There will be times, however, when Salesforce releases a new interface before a new version of this guide is released. There will also be cases when this guide references a version of the user interface that you have not enabled in your Salesforce environment. If you encounter a situation where you are unable to translate any of these differences, please contact our support organization and they will be more than happy to assist you.

Installing iTools Configuration Manager

In addition to the proper permissions, the iTools Configuration Manager, version 5.0 or higher, must be installed and a license assigned to your account. The iTools Configuration Manager is a prerequisite package and provides license management and configuration setting functionality for all iTools in the collection. If you have already installed the iTools Configuration Manager you can skip this section and continue with the next section.

To install the iTools Configuration Manager:

1. Go to the AppExchange located at:

   https://appexchange.salesforce.com/

2. Locate the listing for **iTools Configuration Manager** by searching for "iTools Configuration Manager" or direct your browser to:

   https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7eMEAS

3. Click the **Get It Now** button and follow the installation prompts. When asked to choose the initial access to package resources be sure to select **Install for Admin Only**.

If you would like more detailed step-by-step instructions for installing the iTools Configuration Manager, please see the iTools Configuration Manager Configuration Guide available on the tool's AppExchange listing or on our website at https://www.insitusoftware.com/itools-documentation

Installing iTools Employment Change Management

iTools Employment Change Management can be installed from the Salesforce AppExchange into your environment by simply following the instructions below:

1. Go to the AppExchange located at:

   https://appexchange.salesforce.com/

2. Locate the listing for **iTools Employment Change Management** by searching for "iTools Employment Change Management" or direct your browser to:

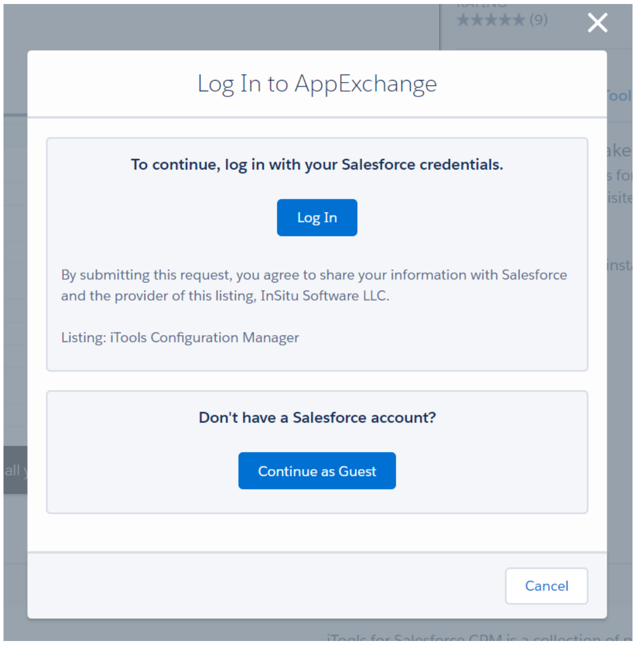
https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001qVZEEA2

Make sure you are on the AppExchange listing for the **iTools Employment Change Management**. iTools for Salesforce is sold as a single subscription but each individual iTool is installed separately and has its own similar looking AppExchange listing. Using separate listings ensures that you can install only the iTools that you need in your environment.

If you accessed the AppExchange from the AppExchange Marketplace link in the Setup section of Salesforce.com and are using the Lightning user interface, the next couple of steps may vary slightly in the details but the basic steps for starting the install will be the same.

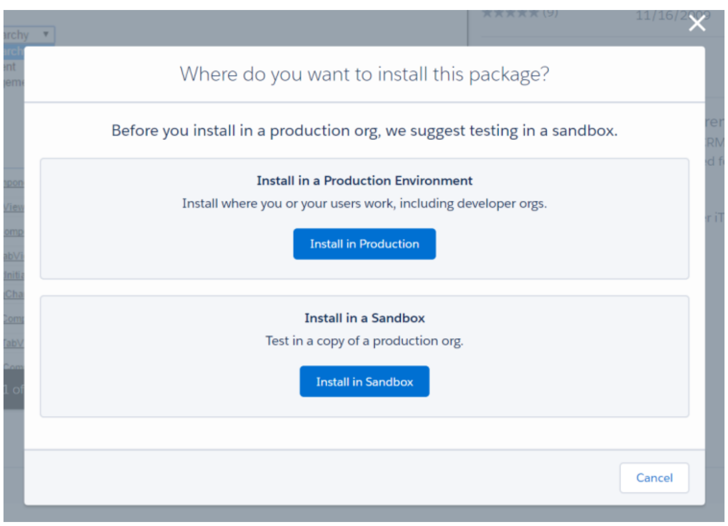
3. Click the **Get It Now** button**.**

4. If you have not already logged into the AppExchange you will be asked to do so before you can continue with the install. If prompted, click the Log In button and provide your Salesforce.com credentials as requested.



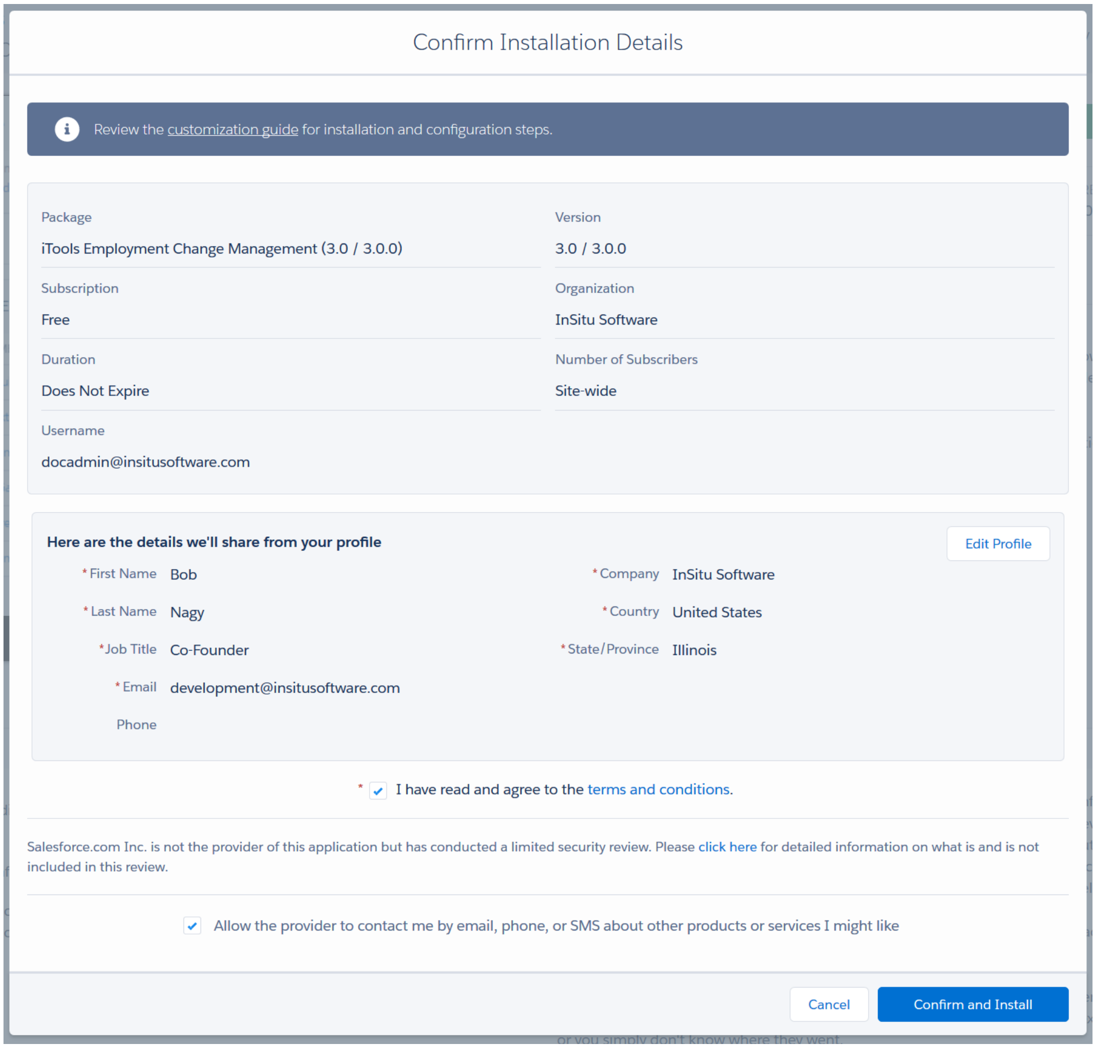
After logging in you may be returned to the iTools Employment Change Management listing page and will need to click the **Get it Now** button again.

5. Next you must choose whether to install iTools Employment Change Management into a Production or Sandbox Environment. iTools will work properly in either environment.



If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.

6. The next step is to confirm the installation details, ensure that all required user profile information is filled in, collect agreement to the package's terms and conditions, and indicate if InSitu Software is permitted to contact you regarding other products and services. When you have provided the required information and agreed to the terms and conditions by checking the check the box at the bottom of the screen labeled **I have read and agree to the above terms & conditions**, click the **Confirm and Install** button.



7. Choose the initial access to package resources.

   For users to be able to use iTools Employment Change Management they must be granted permission to access the tabs, custom objects, custom fields, Apex classes, and Visualforce pages that make up the application. This access can be granted either by updating the user's profile or by creating and assigning the user the appropriate Permission Set. At this step in the installation process you must decide between two approaches to granting users access to the Employment Change Management resources:

Install for All Users

If you chose this option, the installation routine will update all your custom Salesforce account profiles so that all users will have access to all the package's resources. This does not necessarily mean every user will be able to use the Employment Change Management tool, they must still be allocated licenses, but you will not have the additional configuration step of assigning Permission Sets to the proper iTool users.

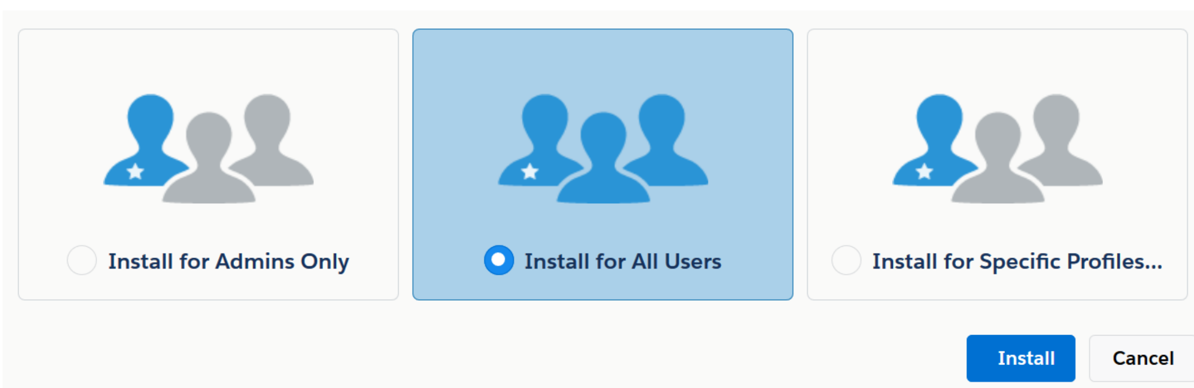
Install for Admins Only

Choose this option if you plan to make iTools Employment Change Management resources visible to the appropriate users through the assignment of Permission Sets.

Install for Specific Profiles…

Choose this option if you plan to make iTools Employment Change Management resources visible only to users you know are assigned to a specific set of User Profiles.

InSitu Software recommends you choose the **Install for All Users**.



If you currently use the Professional Edition of Salesforce, you will not be given the option to which set of users have access to the package's resources. iTools Employment Change Manager is, however, fully functional in the Salesforce Professional Edition.

8. Click **Install** to complete the installation process. The install of the iTools Employment Change Management package generally requires only a minute or two but may take longer if the Salesforce.com services are being heavily utilized. If the install requires more than a minute or so to complete you will be informed on screen of the delay and an email will be sent to you when the install is complete.

If you did not install the iTools Configuration Manager version 5.0 or greater before attempting to install iTools Employment Change Management, you will receive an email from Salesforce indicating the install failed. The problem section of that email will indicate something like:

> (iTools Configuration Manager 5.0) A required package is missing Package "iTools Configuration Manager", Version 5.0 or later must be installed first.

Granting Users Access

The Salesforce package installation routine automatically grants you, the administrator, the privileges and licenses needed to access all the features of the Employment Change Management tool. However, for other users to access the iTools Employment Change Management features, you will need to make sure they 1) have access to the proper package resources and 2) have been allocated licenses to the proper iTools packages. You can grant this access now or wait until you have activated and configured the features of the tool you wish to employ at your organization.

Package Resource Access

Before any user can access the tabs, custom objects, custom fields, code, or pages owned by an installed package they must first be granted the proper access to those resources. This access can be granted either by updating each of the account profiles used by your iTools users or by creating and assigning a Permission Set to the appropriate users. If during the installation wizard you chose the **Install for All Users** or the **Install for Specific Profiles** option or you are using the Professional Edition of Salesforce.com, your editable account profiles were automatically updated to grant full access to all the iTools Employment Change Management resources.

If you chose **Install for Admin Only** during the installation, then you will need to create a Permission Set which grants the appropriate resource access and apply that Permission Set to your iTools users.

InSitu Software is not able to provide the Permission Set needed for proper access to the Employment Change Management resources due to Salesforce.com packaging limitations.

The Permission Set you need to create for Employment Change Management users requires granting access to one object and two Visualforce pages. The object, Employment History, should be configured as follows:

Permission Set
iTools Employment Change Management User

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > Object Settings ▾ **Employment History** ▾

Employment History Save Cancel

Object Permissions

Permission Name	Enabled
Read	☑
Create	☑
Edit	☑
Delete	☑
View All	☐
Modify All	☐

Field Permissions

Field Name	Read Access	Edit Access
Account	☑	☑
Contact	☑	☑
Created By	☑	☐
Department	☑	☑
End Date	☑	☑
History ID	☑	☐
Last Modified By	☑	☐
Length of Service	☑	☐
Location	☑	☑
Notes	☑	☑
Reports To	☑	☑
Start Date	☑	☑
Title	☑	☑

The Visualforce pages that must be included are:

Permission Set
iTools Employment Change Management User

Find Settings... | Clone | Delete | Edit Properties | Manage Assignments

Permission Set Overview > **Visualforce Page Access** ▾

Visualforce Page Access

Visualforce Page Name
InSituEcm.InSitu_Change_Account
InSituEcm.InSitu_Change_Account_Page2

Once the Permission Set is created, you must apply it to all users that will be licensed for iTools. When adding one or a few new users to your Salesforce environment the easiest method of granting the required Permission Set is to use the **Permission Set Assignments** section of the User detail page. This section lists the currently applied Permissions Sets and includes an **Edit Assignments** button for accessing the administrative page for applying (or removing) other Permission Sets.

However, if you are deploying the new permission set to a significant number of users, you will find it easier to mass assign permission using the **Manage Assignments** button on the permission set's detail page.

Standard Profile Custom Object Access

If your Salesforce edition is Enterprise, Unlimited, Performance, or Developer AND you have non-admin users assigned to one of the standard Salesforce.com user profiles (checkbox in the Custom column on the list of Profiles is not checked), those users do not have access to newly created custom objects, even if you selected **Install for All Users** during install. Because the employment history records generated by iTools Employment Change Management are stored in a custom object, you must provide all non-admin users permission to read and edit the **Employment History** object. Without the proper permission, your users will not be able to view or create the Former Employer / Former Employee data.

If you currently use the Professional Edition of Salesforce.com, custom object permission is automatically granted to all users for all custom objects added to the system. Therefore, you can skip the next section in the configuration.

Custom vs. Standard User Profiles

There are standard profiles in every Salesforce.com organization. In Enterprise, Unlimited, Performance, and Developer Edition organizations, you can use standard profiles, or create, edit, and delete custom profiles. For standard profiles, only certain settings can be changed. Unfortunately, custom object permission settings cannot be changed on a standard profile, so custom profiles must be used to provide access to the iTools Employment Change Management custom objects.

Migrating Users from Standard to Custom Profiles

If you have non-admin users assigned to 'standard' profiles, those users should be re-assigned to a custom profile to access the iTools custom objects. This is because object permissions on 'standard' profiles are set to 'off' or no access and cannot be changed.

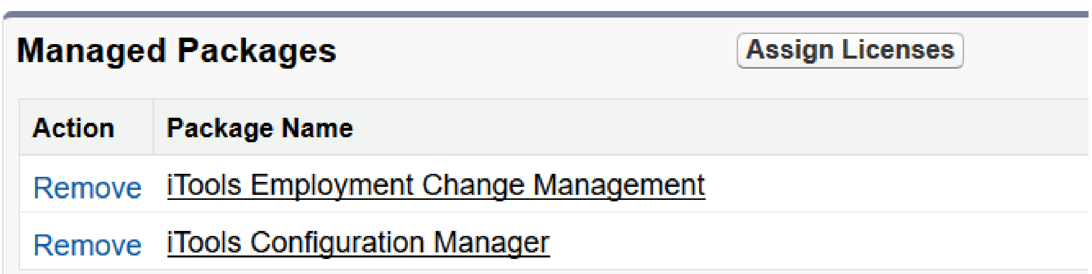
Reassigning users to custom profiles can be as easy as:

- Cloning the standard profiles and turning on access to the iTools custom objects.
- Working through the list of users for each standard profile and re-assigning them to a custom profile.

Package Licenses

Each user of iTools Employment Change Management must be assigned a license to **both** the iTools Configuration Manager and iTools Employment Change Management packages. If you are not intending to license iTools for all your Salesforce users, please refer to the *Licensing* section of this guide for more information regarding the impact of non-licensed users on each feature of the Employment Change Management package.

When adding one or a few new users to your Salesforce environment the easiest method of granting the required package licenses is to use the **Managed Packages** section of the User detail page. This section lists the currently applied licenses and includes an **Assign Licenses** button for accessing the administrative page used to apply (or remove) other managed package licenses.



However, if you are deploying the Employment Change Management tool to a significant number of users, you will find it easier to mass assign licenses from the license management page of each iTools package. To access this page for any managed package, locate the **Installed Packages** section in Setup and click on the Manage Licenses link in the Action column next to the package whose licenses you wish to allocate.

Installed Packages

Action	Package Name	Publisher	Versio
Uninstall | Manage Licenses	iTools Employment Change Management **Description** Automatically create employment history, alert opportunity owners, keep tasks and events fro	InSitu Software LLC	3.0
Uninstall | Manage Licenses	iTools Configuration Manager **Description** Manages the configuration and settings for all of the InSitu Software iTools for Salesforce CR	InSitu Software LLC	5.1

From this page you can see all users already assigned a license to the package as well as add additional users using the **Add Users** button.

If you have installed iTools in a sandbox org, there is no license control and all users are automatically assigned a license to every managed package. If you need to test the impact of iTools on unlicensed users, please contact InSitu Software Technical Support and request that license control be enabled in your sandbox.

iTools Settings

All iTools, including Employment Change Management, include an extensive set of configuration settings used to control the appearance and behavior of the tool. These settings, called iTools Settings, belong to the iTools Configuration Manager package and are viewed and updated via the iTools Settings tab.

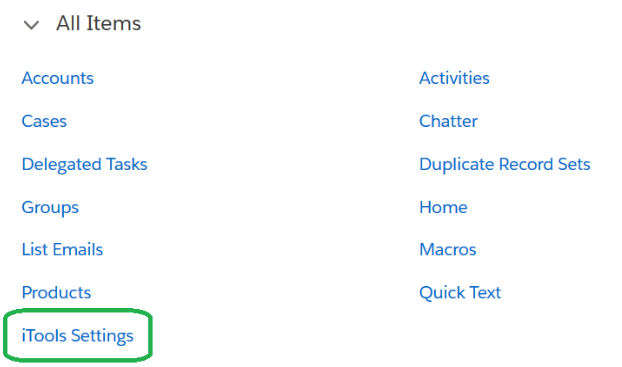
Throughout this guide, specific iTools Settings will be referenced and you may be instructed to set them to a certain value to affect the behavior or appearance of Employment Change Management. All references to individual iTools Settings will appear in this guide as follows:

ExampleSetting

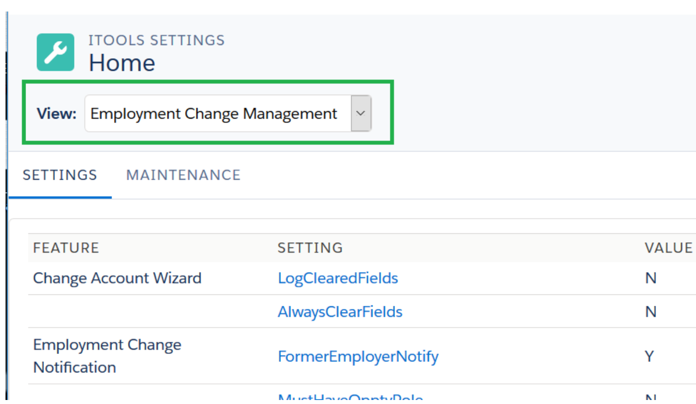
To access a specific setting follow these simple steps:

If you are using the Lightning User Interface

1. Click the “nine dot” icon in the top left of any page.
2. Click the iTools Settings option in the All Items section



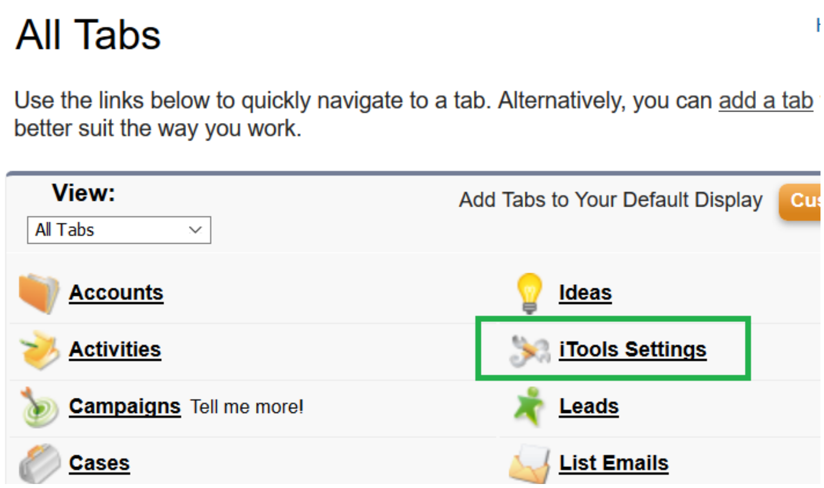
3. Select “Employment Change Management” in the View dropdown list if it is not already selected.



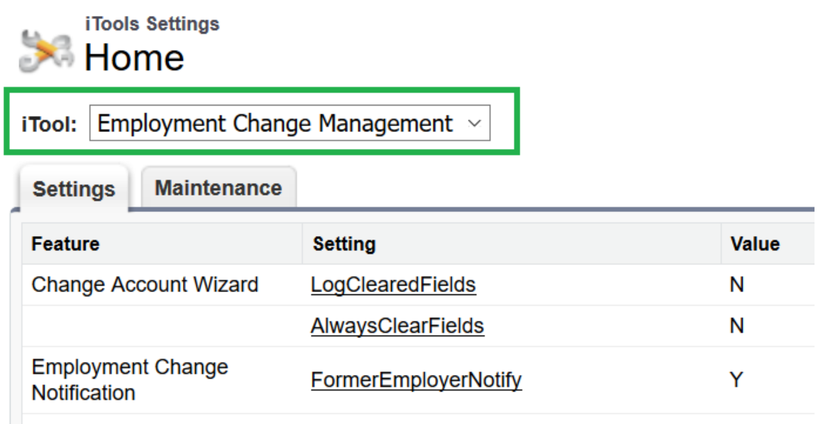
4. Locate the referenced setting in the Setting column and click it.

If you are using the Classic User Interface

1. Click the “plus” tab at the far right of the tab bar.
2. Click the iTools Settings option in the list of All Tabs



3. Select “Employment Change Management” in the iTool dropdown list if it is not already selected.



4. Locate the referenced setting in the Setting column and click it.

Where screen shots are needed in this guide to point out additional options within an iTools Setting, the Lightning UI version of the page will be used. The Classic UI version of the page will contain the same fields and buttons and behave in an identical manner, it will simply look a bit different. Either user interface can be used to manage any of the individual iTools Settings.

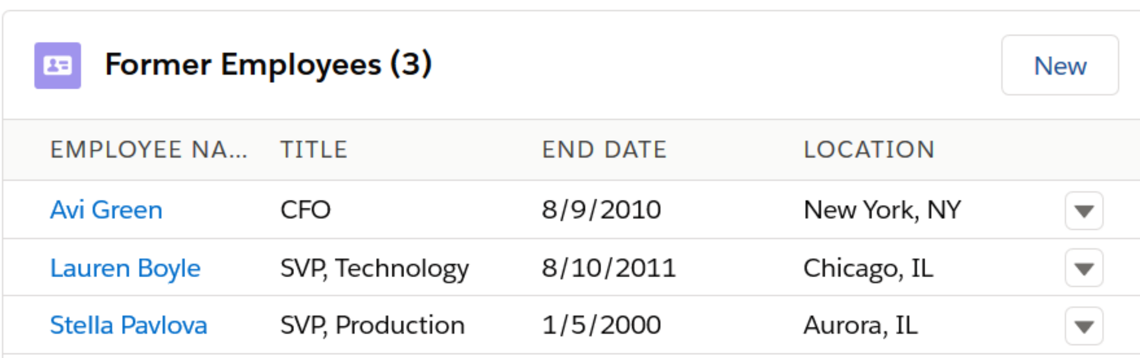
Feature: Employment History

iTools Employment Change Management automatically creates an Employment History record every time the Account information on a Contact record changes not matter the source of that change. Whether it is a user using the native Salesforce user interface, Process Builder processes you set up, integration with other applications / data, or the iTools Change Account Wizard the history of where your contacts have worked will always be captured. The record of where a contact has worked and who your organization knows that has worked for a given account build a vital component of your organization's relationship intelligence.

Simply by installing iTools Employment Change Management and assigning licenses to your users you will automatically be generating Employment History records. To make those records visible, and thus more useful to your users, some additional configuration is required.

Add the Former Employees Related List

iTools Employment Change Management generated Employment History records, when viewed from an Account, represent the list of Contacts you know that used to work at that account. Your Account Detail page should be configured to display these history records in a related list called 'Former Employees'.



Former Employees (3)

New

EMPLOYEE NA...	TITLE	END DATE	LOCATION
Avi Green	CFO	8/9/2010	New York, NY
Lauren Boyle	SVP, Technology	8/10/2011	Chicago, IL
Stella Pavlova	SVP, Production	1/5/2000	Aurora, IL

The Former Employees related list was added to your environment when iTools Employment Change Management was installed. However, before users can take advantage of this feature, the related list must be added to your Account Page Layout(s) and configured to display the employment history field values. Follow these instructions to add the Former Employees related list to your Account detail pages and to configure the display of information in the list.

1. Navigate to the Page Layout editor for the Account page

   Lightning:

   Setup > Objects and Fields > Object Manager >

   Click the **Account** link in the list **> Page Layouts >**

   Click the icon in the last column of the layout to update **>** **Edit**

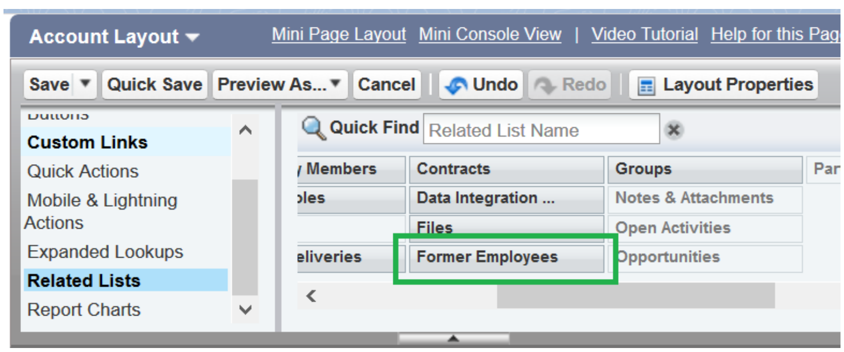
   Classic:

   Setup > Customize > Accounts > Task Page Layouts >

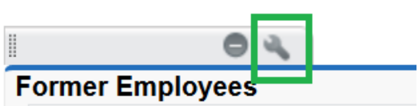
   Click on the **Edit** link next to the layout to update

If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

2. Locate **Former Employees** in the list of Related Lists at the top of the page.



3. Drag the field to the location on the Account Page Layout that suits your layout best. The exact location does not impact the operation of the feature.
4. After placing the related list on the layout, click on the small "**wrench**" icon to display its properties.

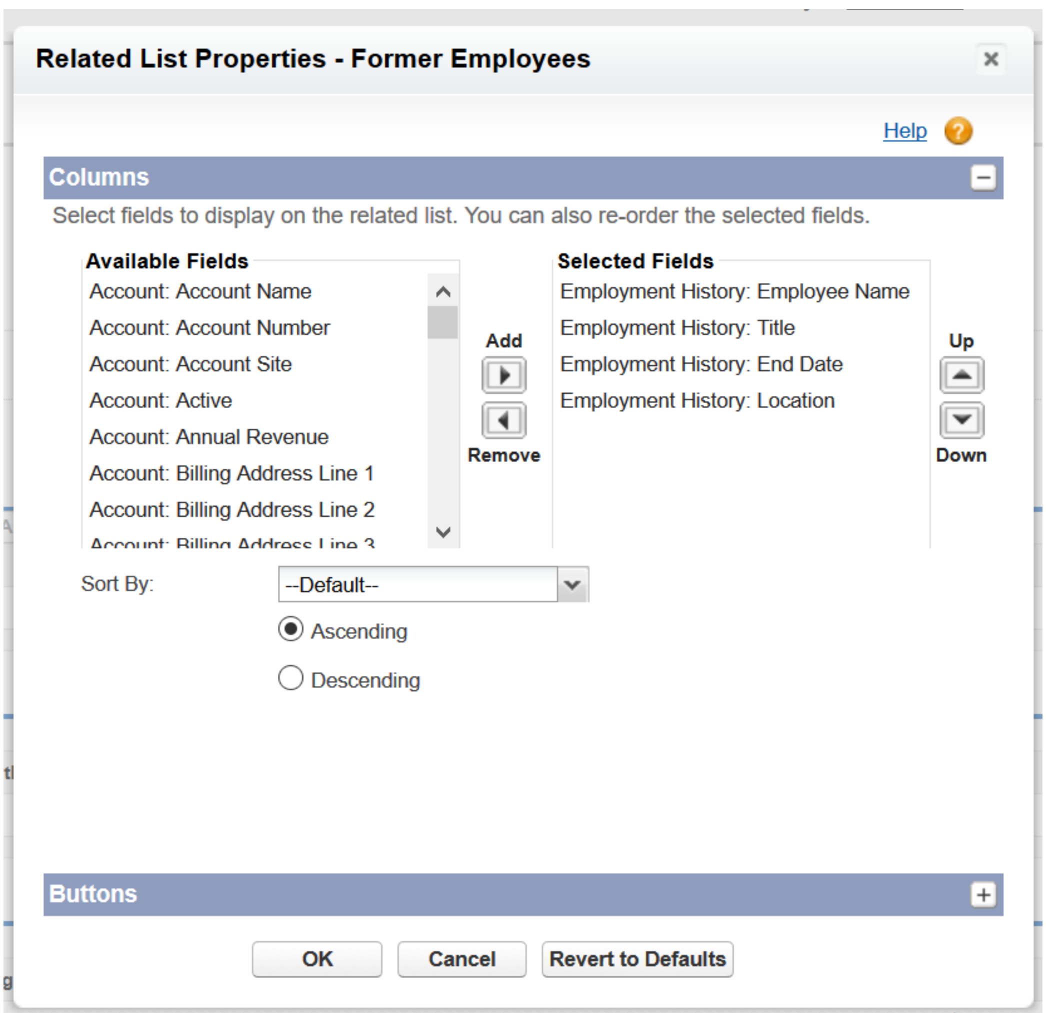


5. In the Related List Properties popup window select the fields you want displayed in the related list and which Colum you want to be used for sorting.

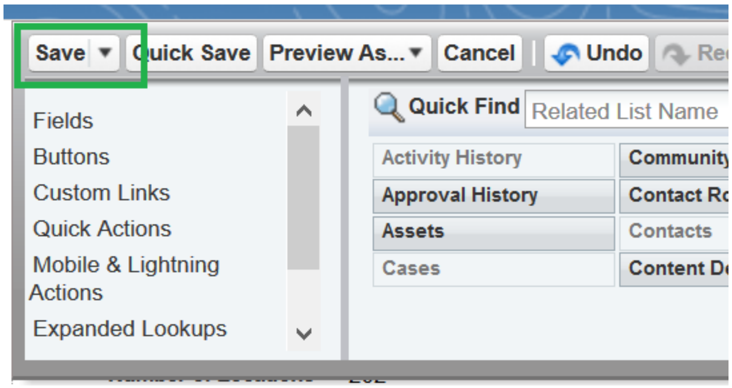
The columns you select for the related list configuration may be affected by which user interface you are using. In Salesforce Classic you can have up to 10 fields displayed and fields from a related object such as Contact: Last Name will be displayed in the list as a hyperlink to that object. In Lightning, as of Winter '19, only the first 4 columns are displayed on a detail page (more are displayed if you select the View All link) and fields from a related object other than the Name field do not display as hyperlinks.

The iTools Employment History record does include a formula field called Employee Name that renders as a hyperlink to the Contact record. Sites using the Lightning user interface mat want to use this field rather than the Contact: First Name and Contact: Last Name fields. This field is a hyperlink so it sorts on the value of the URL and not the display name.

6. Click on the **OK** button.



7. Click on the **Save** button at the top of the page to save your changes.



If you have more than one Account Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Account Page Layout.

The Employment History record also includes fields for Start Date and End Date for recording the timeframe the contact was employed with the associated company. iTools will automatically set the End Date to the date the company association changes but has no way of knowing the Start Date other than asking users to enter it when creating contacts. If this level of detail is valuable to your organization and you expect users will enter this information, you can also include the Start Date, End Date, and Length of Service (a formula field that calculates the time between the Start and End Dates) fields in the related list layout. You will also need to add the Start Date to the Contact page layout and instruct your users to edit that date when creating a new contact.

Add the Former Employers Related List

iTools Employment Change Management generated Employment History records, when viewed from a Contact, represent the list of previous employers. Your Contact Detail page should be configured to display these history records in a related list called 'Former Employers'.

Former Employers (4) New

ACCOUNT NAME	TITLE	END DATE	LOCATION
University of Arizo...	SVP, Administration ...	10/1/2017	Tuscon, AZ
Grand Hotels & Re...	Controller	10/17/2007	Phoenix, AZ
UO&G Financial S...	Director of Finance	10/17/2000	Houston, TX
Arthur Andersen	Manager	10/17/1989	Houston, TX

The Former Employers related list was added to your environment when iTools Employment Change Management was installed. However, before users can take advantage of this feature, the related list must be added to your Contact Page Layout(s) and configured to display the employment history field values. Follow these instructions to add the Former Employers related list to your Contact detail pages and to configure the display of information in the list.

1. Navigate to the Page Layout editor for the Contact page

   Lightning:

   Setup > Objects and Fields > Object Manager >

   Click the **Contact** link in the list **> Page Layouts >**

   Click the icon in the last column of the layout to update **>**

   Edit

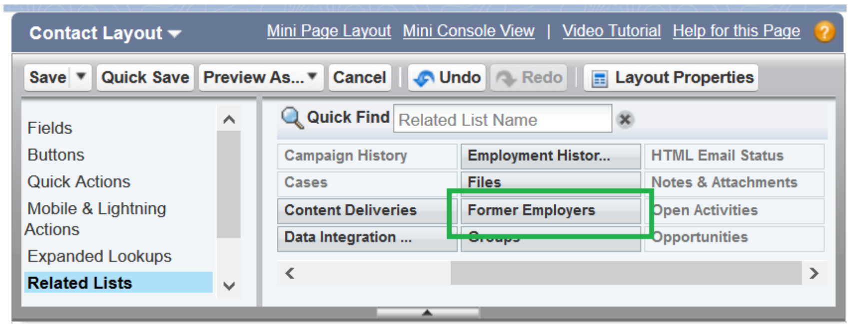
   Classic:

   Setup > Customize > Contacts > Task Page Layouts >

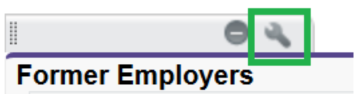
   Click on the **Edit** link next to the layout to update

If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

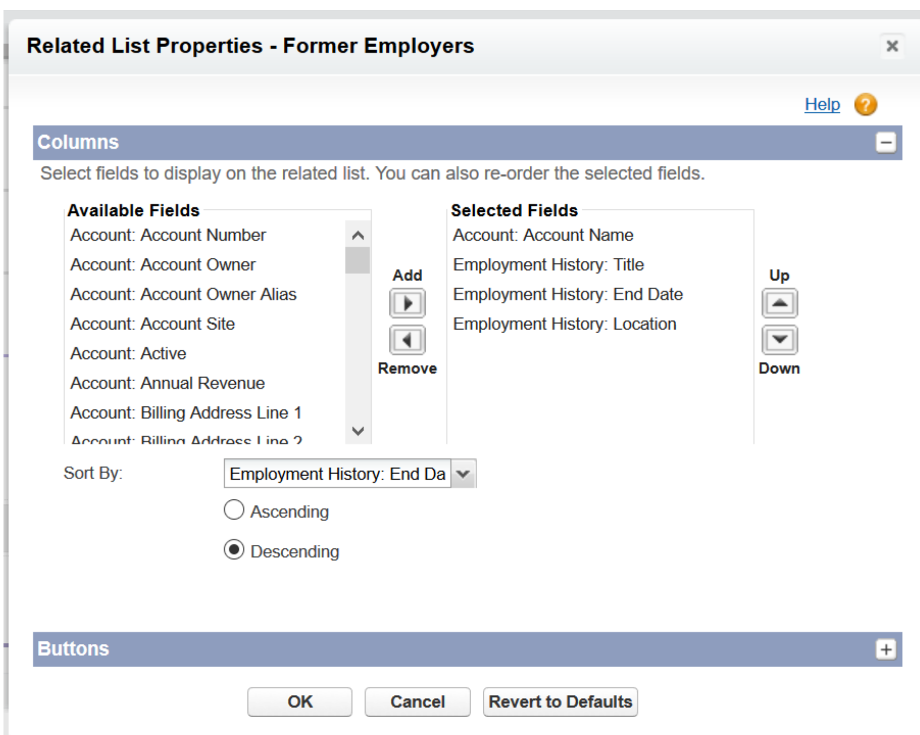
2. Locate **Former Employers** in the list of Related Lists at the top of the page.



3. Drag the field to the location on the Contact Page Layout that suits your layout best. The exact location does not impact the operation of the feature.
4. After placing the related list on the layout, click on the small "**wrench**" icon to display its properties.



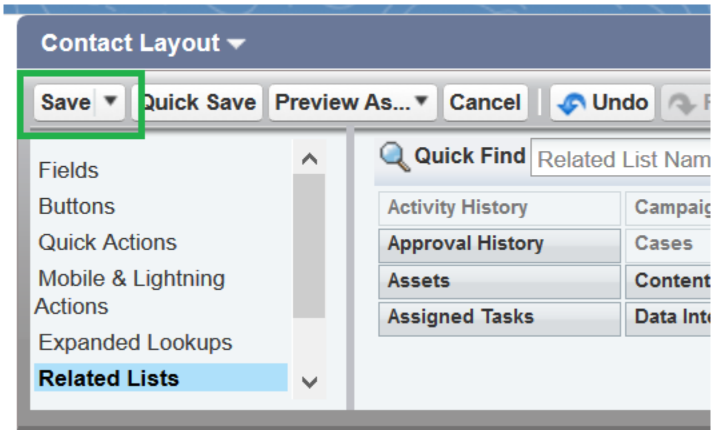
5. In the Related List Properties popup window select the fields you want displayed in the related list and which Colum you want to be used for sorting. You may also want to remove the Change Owner button as it is generally not needed on this object.



6. Click on the **OK** button.

INSITU SOFTWARE

7. Click on the **Save** button at the top of the page to save your changes.



If you have more than one Contact Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Contact Page Layout.

The Employment History record also includes fields for Start Date and End Date for recording the timeframe the contact was employed with the associated company. iTools will automatically set the End Date to the date the company association changes but has no way of knowing the Start Date other than asking users to enter it when creating contacts. If this level of detail is valuable to your organization and you expect users will enter this information, you can also include the Start Date, End Date, and Length of Service (a formula field that calculates the time between the Start and End Dates) fields in the related list layout. You will also need to add the Start Date to the Contact page layout and instruct your users to edit that date when creating a new contact.

Contacts to Multiple Accounts Settings

If you have enabled the new Salesforce.com feature which allows you to associate a contact to multiple accounts, you will want to change one of that feature's configuration settings. By default, when the Contacts to Multiple Accounts feature is enabled and a contact's associated account changes, the previous account is added as an additional relationship. This new additional account relationship has no indication that it is for a former employment relationship and is redundant of the iTools Employment History record. Fortunately, Salesforce allows this behavior to be disabled so that no additional relationship is created. To change this configuration setting:

1. Navigate to the Account Settings

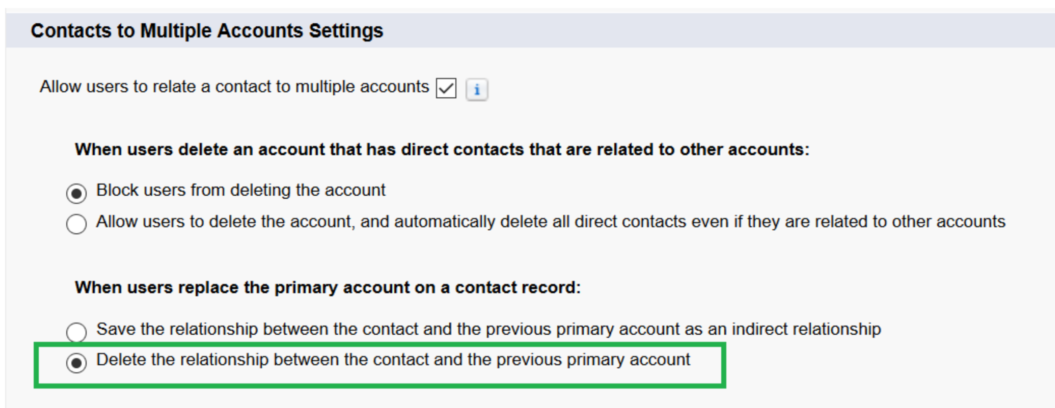
    Lightning:

    Setup > Feature Settings > Sales > Account Settings

    Classic:

    Setup > Customize > Accounts > Account Settings

2. Click **Edit**.
3. Change the setting **When users replace the primary account on a contact record** to the value "Delete the relationship between the contact and the previous primary contact"



4. Click **Save**.

Feature: Unknown Employer

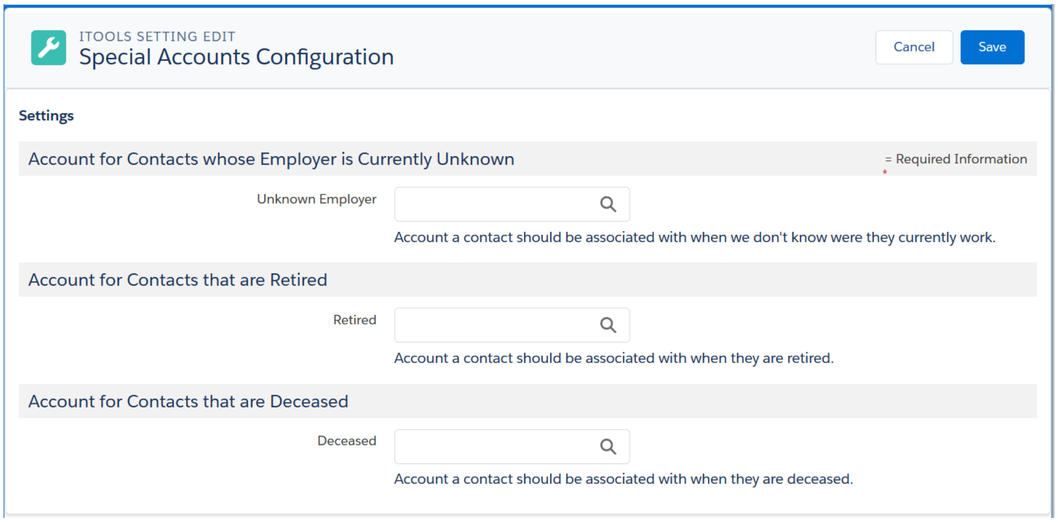
In Salesforce.com, if a contact does not have an associated account specified, then it is not visible and accessible to most users in the system. In fact, without an account value, a contact virtually 'disappears' since it can only be viewed system administrators and the user identified as the record owner. For many organizations, disappearing contacts often result in missed opportunities, perceived loss of valuable relationship and activity information, and duplicate contact records (dup checking can't find what the user can't see). To prevent this, instead of clearing out the contact's account field when the contact is no longer at their current company, but users don't know which company they are associated with, certain organizations will instruct their users to update a value in another contact field with text that indicates the contact is no longer associated with the account. For example, it is not uncommon to see words such as ' inactive ' or 'former' pre-pended or appended to the first or last name of a contact. While this prevents contacts from disappearing, it does cause other types of confusion and interference because these contacts will show up in views, reports and searches in the context of the account even though they are no longer associated with the account.

A better practice followed by a few organizations is to create a faux account with a recognizable name like 'UNKNOWN EMPLOYER'. These organizations instruct their users to change the contact's associated account to this faux account instead of clearing the current account value when the contact is no longer associated with the account, but their new employer is not yet known. By doing so, the contact and its associated relationship information does not disappear and anyone coming across the contact will easily know that as an organization we do not know where this person is currently working. In addition to using a faux account in the situation where a contact's current employer is not known, similar accounts can be set up for when a contact is retired or deceased.

If your organization is not currently using faux accounts, but would like to start, iTools Employment Change Management can help. The tool has several features that help you and your users ensure that contacts no longer associated with any account will no longer "disappear" from Salesforce.com. For iTools Employment Change Management to help, however, you must first let it know which of your Account records should be used in these special circumstances.

If you have not already created special faux accounts for the three special situations that iTools can assist with; Unknown Employer, Retired, and Deceased, please do so now. Be sure that these accounts are visible by all users. Once the accounts have been created follow these simple steps to let iTools know where they are:

1. Access the **SA_Configure** iTools Setting. If you are unfamiliar with accessing iTools Settings, please review the *iTools Settings* section at the beginning of this guide.
2. Click the **Edit** button.



3. Fill in each of the special account fields that you intend to use. Click the **Save** button to save your changes.

Now that iTools knows which of your Accounts are used for special employment situations it can help your users associated contacts to those accounts when necessary. The most helpful of these features is the ability to automatically associate a contact to the Unknow Employer account anytime a contact is saved and there is no value in its Account field. With this feature, users don't have to worry about what to do when they discover a contact is no longer at the company indicated on their Salesforce record. They simply do what they would do in their personal contact list – clear the company name and same the record.

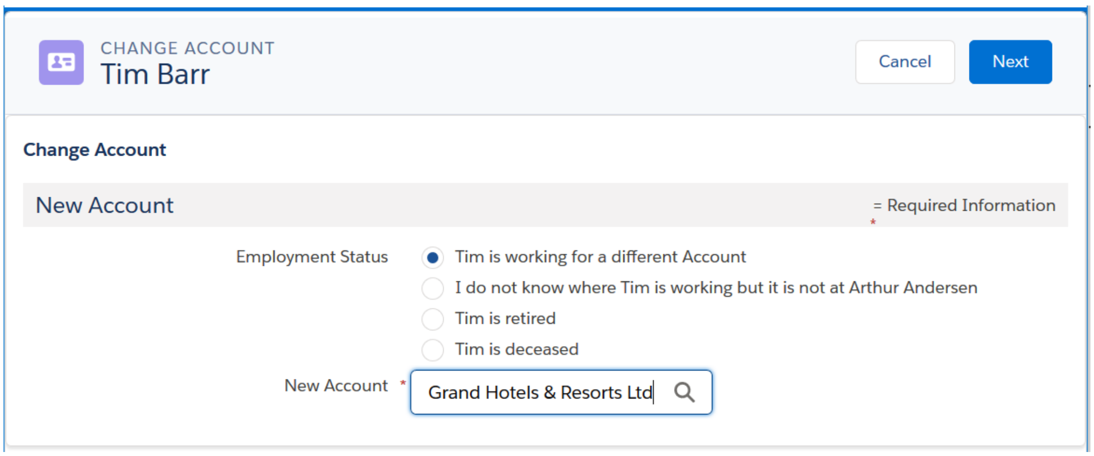
If you do not want iTools to automatically assign the Unknow Employer account to contacts without an account simply change the **AutoUnknow** iTools Setting from Y(es) to N(o).

The Unknown Employer account is used by both the auto assignment of Unknown Employer and the Change Account Wizard features of iTools Employment Change Management. The Retired and Deceased accounts are only used by the Change Account Wizard and if left blank will not be offered options in that feature.

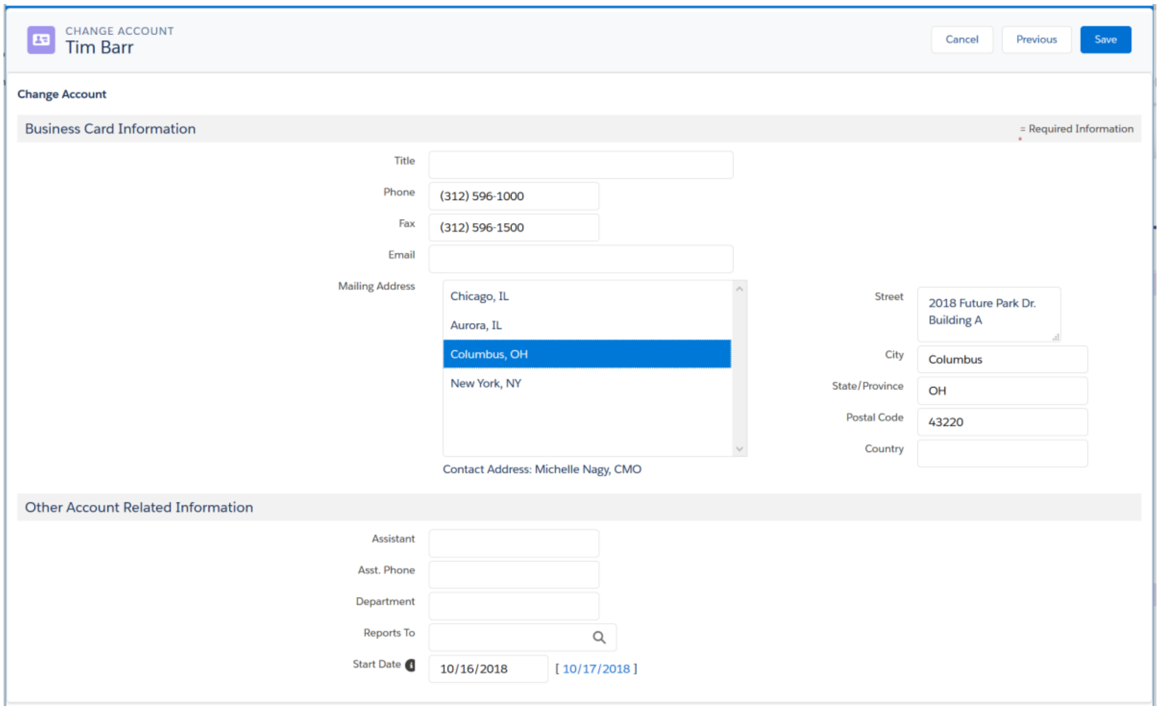
Feature: Change Account Wizard

In Salesforce.com, changing the account a contact is associated with can be a laborious task. Not only do you need to lookup the new account the contact is now associated with, but you also must clear out all the fields whose values were tied to their previous employer for which you do not have new values. You don't even get default values from the newly selected account like you do when creating a new contact.

iTools Employment Change Management's Change Account wizard can help make this process much easier. Using the iTools provided Change Account button can save users time and frustration as well as guiding them to the proper behavior when the contact they are updating should be associated with a special circumstance account such as Unknown Employer, Retired, or Deceased.



Step 1 of wizard helps users select the proper option based on the contact's new employment state. If the contact is not working at another company, or the user does not know what that company is, they simply click the proper option and the contact will automatically be associated with the specially designated account.



Step 2 of the wizard gives makes it easier to enter business card information by defaulting key phone numbers and letting users select from addresses associated with the new account or other contacts at that account. As an administrator you also get to configure which other contact fields appear on the page two as well as which fields get cleared when a contact's associated account changes.

Configure Contact Field Sets

Before you make the Change Account button available to your iTools licensed users you need to review and update a couple of Contact Field Sets. These field sets, added to your Contact record when iTools Employment Change Management was installed, control which fields, whose values are generally based on a contact's current employer, should be cleared when the contact's employment changes and which contact field should be displayed in the Other Account Related Information section of the wizard. To review / update these field sets, follow these simple instructions:

1. Navigate to the list of Contact Field Sets

   Lightning:

   Setup > Objects and Fields > Object Manager >

   Click the **Contact** link in the list **> Field Sets >**

   Click the icon in the last column of the field set to update **>**

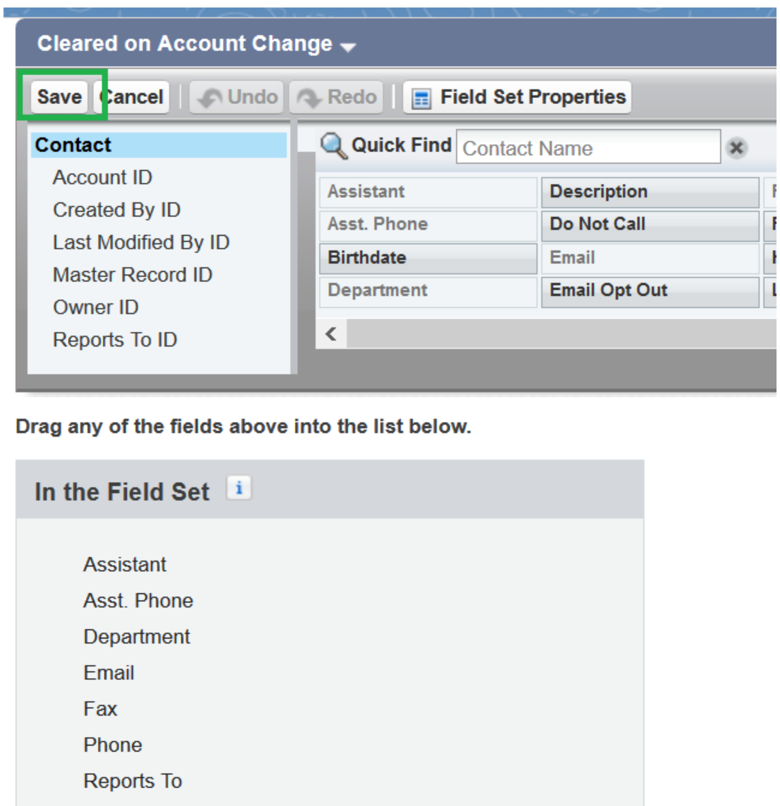
Edit

Classic:

Setup > Customize > Contacts > Field Sets >

Click on the **Edit** link next to the field set to update

2. Drag fields to and from the In the Field Set section of the page to add and remove fields from the set. Which fields you include in the set will depend on the Contact fields in your Salesforce org and your functional requirements. When you have finished updating the set click on the **Save** button and repeat the process for the other iTools field sets.



The purpose of each of the iTools provided Field Sets is as follows:

Cleared on Account Change

The contact fields that will be cleared by the wizard anytime the wizard is used to change the account a contact is associated with. This applies when changing to another account as well as changing to one of the special circumstance accounts like Unknown Employer or Retired. The fields in this list are those whose values are generally specific to the organization a person works for and would no longer be accurate if the person left that organization.

Cleared when Deceased

These fields are the contact fields that should be cleared when a contact is associated with the special account designated for contacts that are deceased. When the user indicates that a contact is deceased, iTools will clear all of the fields identified in the Cleared on Account Change field set as well as the fields in this field set. This field set should include the fields whose values should never be used once a person is no longer living. For example, clearing the contact's mobile phone number and any email addresses will prevent any attempted communications.

Other Account Related Fields

These are the contact fields that should be included in the Other Account Related Fields section of wizard's page 2. This field set should include the fields that you normally include on the contact page layout and whose value commonly changes when the contact changes employers.

Add the Change Account button

For licensed iTools users to access the Change Account Wizard you need to add the Change Account button to the Contact page layout. This is a very simple step and can be accomplished by following these simple steps:

1. Navigate to the Page Layout editor for the Contact page

 Lightning:

 Setup > Objects and Fields > Object Manager >

 Click the **Contact** link in the list **> Page Layouts >**

 Click the ▾ icon in the last column of the layout to update **>**

 Edit

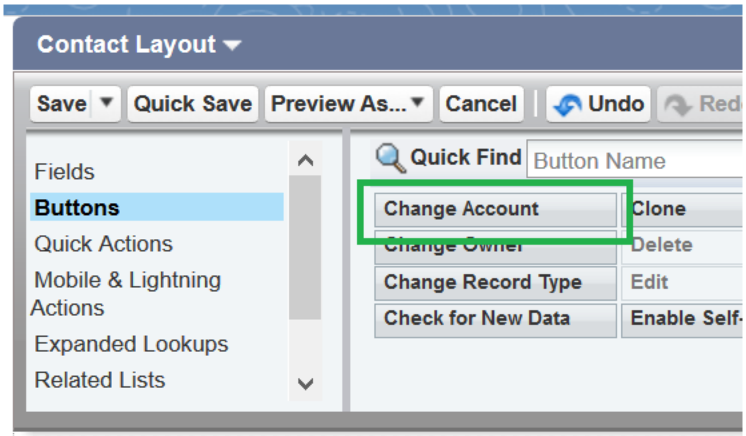
 Classic:

 Setup > Customize > Contacts > Contact Page Layouts >

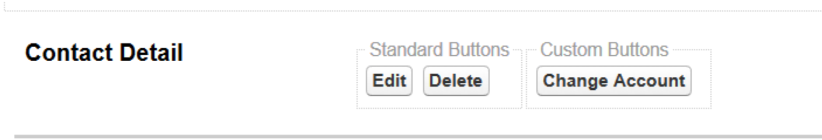
 Click on the **Edit** link next to the layout to update

If you currently use the Professional Edition of Salesforce, you will not see a list of page layouts because the Profession Edition supports only one page layout per object.

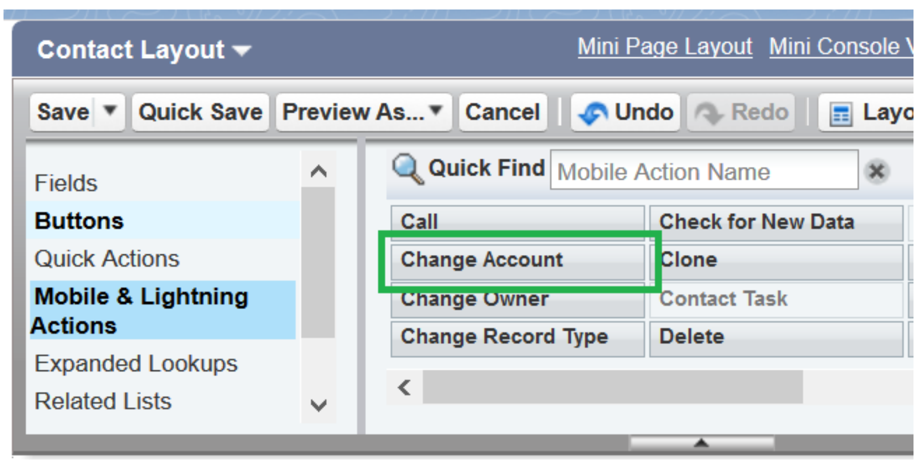
2. Locate **Change Account** button in Buttons list at the top of the page.



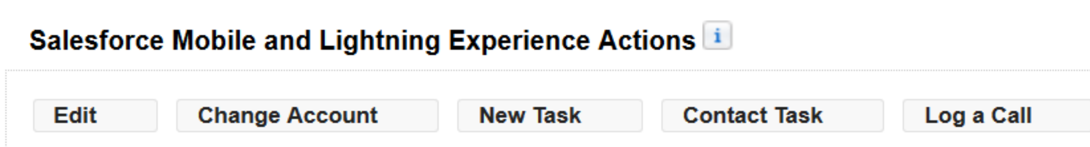
3. Drag the button to the Custom Buttons section of the page layout.



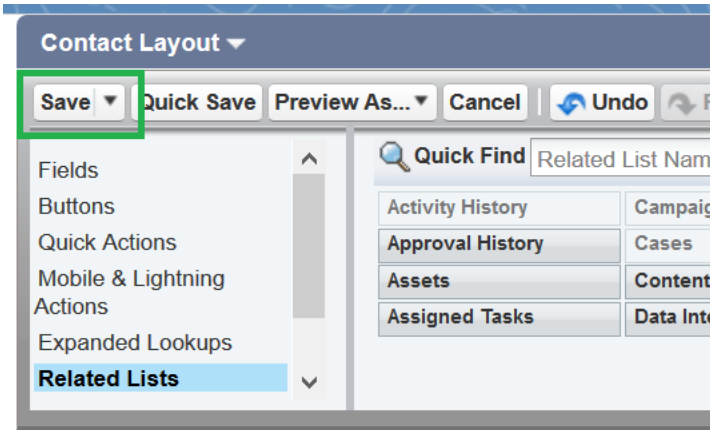
4. Locate the **Change Account** action in the Mobile & Lightning Actions list at the top of the page.



5. Drag the action to the Salesforce Mobile and Lightning Experience Actions section of the page layout.



6. Click on the **Save** button at the top of the page to save your changes.



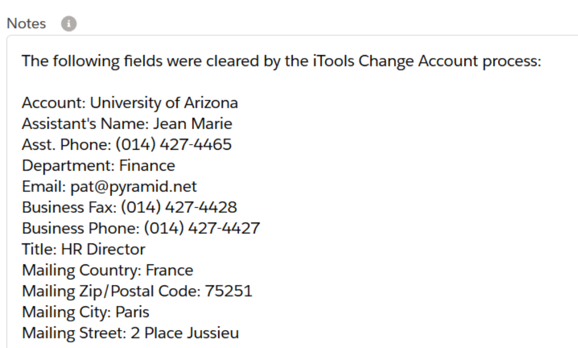
If you have more than one Contact Page Layout in your organization, you will need to repeat this task for each page layout. If you currently use the Professional Edition of Salesforce.com, you will only have a single Contact Page Layout.

Configuration Options

There are several iTools Settings which can be used to modify the behavior of the Change Account Wizard feature. Those settings and their impact on the feature are as follows:

LogClearedFields

Indicates whether iTools should record all the fields it cleared in the Notes field of the Employment Change History record that is created when a contact's account changes.



If you would like this additional auditing added to the wizard behavior change the iTools Setting to **Y**(es).

> The values logged in the Notes field will be visible to anyone with read access to the Employment Change record even if the use does not have Read access to a field on the Contact that was cleared. If you want a log of the cleared values but you do not want users to be able to see all the field values, you must remove field visibility to the Employment History record's Notes field for all users.

AlwaysClearFields

By default, the Change Account Wizard will only clear the Contact fields specified in the special field sets that the current user can see and edit. If the user using the wizard does not have view and edit access to a field that is to be cleared, the field will not be cleared. If you would prefer that all designated fields be cleared regardless of the current user's access rights, you should update this setting to **Y**(es).

> If you set both **AlwaysClearFields** and **LogClearedFields** both to **Y**(es), you will be allowing users to see field values after an employment change that they may not have been permitted to see before the change. This can be prevented by removing all users' rights to see the Employment History record's Notes field.

SA_Configure

This setting identifies the special employment circumstance accounts in your organization. If an account for Unknown Employer, Retired, or Deceased is not specified, that option will not be presented in Step #1 of the Change Account Wizard.

Feature: Employment Change Notification

A change in employment can have a significant impact on users responsible for Accounts or Opportunities at those accounts. For example, a contact from one of your best customers joins a company where you have an open opportunity. That contact could be a champion for your product at their new company and could represent an important relationship gap at their old company. Users associated with either company or the open opportunity would greatly benefit from knowing about the employment change as soon as possible.

iTools Employment Change Management can hep get the word out about key employment changes with a feature we call Employment Change Notification. The feature will automatically send email notices to Account and Opportunity owners of BOTH the company that the contact left and the company they are going to.

iTools is smart enough to not send an employment change email to the user that added or edited the contact as that users obviously knows about the change. This behavior can, however, make testing the feature a bit difficult as changes you make while testing will never be sent to you.

Message Examples

Following are examples of the email notices iTools Employment Change Management will send and the conditions under which they are sent.

New Contact

Subject: **Contact Employment Change - Adam Adams joined Great Northern Oil Co.**

Adam Adams of Great Northern Oil Co. was added to Salesforce.com. This change may impact the account relationship and/or open opportunities with Great Northern Oil Co. that you own.

Adam Adams

Is Now:
Plant Manager
Great Northern Oil Co.
Detroit, MI

- Message is sent to Account Owner of the associated account.
- Messages is sent to the owner of each open opportunity associated with the account.
- Message never sent to the user that added the contact.
- Message is NOT sent if **NewEmployerNotify** is set to **N**(o).

Employment Change – New Account

Subject: **Contact Employment Change - Adam Adams joined United Oil & Gas Corp.**

Adam Adams has joined United Oil & Gas Corp.. This change may impact the account relationship and/or open opportunities with United Oil & Gas Corp. that you own.

Adam Adams

Was:
Plant Manager
Great Northern Oil Co.
Detroit, MI

Is Now:
Operations Manager
United Oil & Gas Corp.
Houston, TX

- Message is sent to Account Owner of the new associated account.
- Messages is sent to the owner of each open opportunity associated with the new account.
- Message never sent to the user that updated the contact.
- Message is NOT sent if **NewEmployerNotify** is set to **N**(o).

Employment Change – Old Account

Subject: **Contact Employment Change - Adam Adams left Great Northern Oil Co.**

> Adam Adams has left Great Northern Oil Co.. This change may impact the account relationship and/or open opportunities with Great Northern Oil Co. that you own.
>
> **Adam Adams**
>
> Was:
> Plant Manager
> Great Northern Oil Co.
> Detroit, MI
>
> Is Now:
> Operations Manager
> United Oil & Gas Corp.
> Houston, TX

- Message is sent to Account Owner of the old associated account.
- Messages is sent to the owner of each open opportunity associated with the old account.
  - If **MustHaveOpptyRole** is set to **Y**(es), opportunity owners are only sent the notice if the contact has a Contact Role on the opportunity.
- Message never sent to the user that updated the contact.
- Message is NOT sent if **FormerEmployerNotify** is set to **N**(o).

Contact Deleted

Subject: **Contact Employment Change - Adam Adams left Great Northern Oil Co..**

> Adam Adams of United Oil & Gas Corp. was deleted from Salesforce.com. This change may impact the account relationship and/or open opportunities with United Oil & Gas Corp. that you own.
>
> **Adam Adams**
>
> Was:
>
> United Oil & Gas Corp.

- Message is sent to Account Owner of the associated account.
- Messages is sent to the owner of each open opportunity associated with the account.
  - If **MustHaveOpptyRole** is set to **Y**(es), opportunity owners are only sent the notice if the contact has a Contact Role on the opportunity.
- Message never sent to the user that deleted the contact.
- Message is NOT sent if **FormerEmployerNotify** is set to **N**(o).

Configuration Options

To help you control when, or even if, employment change notifications are generated by iTools we included several of iTools Settings. These settings and the behavior they control are as follows:

FormerEmployerNotifiy

Indicates if former employment change notices should be sent when a contact is deleted from Salesforce or their associated account is changed. To turn off these notices change the iTools Setting value to **N**(o).

MustHaveOpportunityRole

This setting works in conjunction with the FormerEmployerNotify setting and is only used if that setting value is set to **Y**(es). The MustHaveOpptyRole setting is used to add a *qualifier* to the logic that determines if an employment change email should be set. If set to **Y**(es), then iTools Employment Change Management will first check to see if the contact who changed employment, or was deleted, had a role on the Opportunity. If the contact had a role on the opportunity, then an employment change email notification will be sent to the Opportunity owners. If the contact did not have a role on the Opportunity, then an employment change email notification will not be sent to the opportunity owner.

Typically, a contact with a role on the Opportunity is one that has a specific responsibility and if such a person should leave, it may have an impact on the status of the Opportunity. If it is important for your Opportunity owners to limit the amount of emails and only receive an employment change email when a contact **with a role** has changed employment, then we recommend you set the value to **Y**(es).

If the MustHaveOpptyRole setting is set to **N**(o), then an email notification will be sent to the Opportunity owners when a contact leaves the associated account, regardless of whether that contact had a role on the Opportunity or not. If it is common in your organization to **not** add contact roles for Opportunities, then we recommend you set this value to **N**(o).

FormerEmployerSubject

This setting specifies the subject line of the change employment email notification that is sent when a contact leaves a company. If you use the special **{CONTACT}** token in the setting value, it will be replaced with the name of the contact. If you use the special **{ACCOUNT}** token, it will be replaced with the name of the contact's former Account.

NewEmployerNotify

Indicates if new employment change notices should be sent when a contact is created in Salesforce or their associated account is changed. To turn off these notices change the iTools Setting value to **N**(o).

NewEmployerSubject

This setting specifies the subject line of the new employee email notification that is sent when a contact is created or joins a company. If you use the special **{CONTACT}** token in the setting value, it will be replaced with the name of the contact. If you use the special **{ACCOUNT}** token, it will be replaced with the name of the contact's new Account.

Feature: Save Tasks/Events

Employment changes and record deletes in Salesforce.com can result in what may customer describe as unexpected results. This behavior is due to the relationship Tasks and Events have to their associated Contact and the way Salesforce displays Tasks and Events with no value in the Related To field in the context of the Contact's current Account. iTools Employment Change Management can change some of these behaviors by monitoring for certain actions and modifying Task and Events prior to the action taking place.

For example, when a Contact is deleted all the Tasks and Events associated with that contact are deleted. Even if the Related To field is filled in the tasks and events will be gone from Salesforce. Also, tasks associated with a contact but have no Related To specified will appear in the list of tasks associated with the contact's current company but when that contact changes employer the tasks will now appear in the context of the new company even though they occurred in the context of the old company.

Some of these behaviors can be changed, or left alone, by updating Employment Change Management iTools Settings:

SaveNoVisibility

This setting indicates whether tasks and events associated with a contact should be retained when the contact is deleted. Without iTools Employment Change Management installed, Salesforce.com will automatically delete all tasks and events associated with a contact when that contact is deleted.

A valuable feature provided by iTools Employment Change Management is its ability to retain tasks and events when the associated contact is deleted. Special processing is performed by the iTool before the contact is deleted to remove the activity's association with the contact. The contact's name will be appended to the activity description so that an association with the contact is maintained for future reference. The iTool will also associate the activity to the contact's account if there is no other association in the **Related To** activity field. Because of these updates, Salesforce.com will not delete the tasks and events when it deletes the contact.

Set the value to **Y**(es) if it is important to your organization to retain tasks and events associated with deleted contacts. Otherwise, set the value to **N**(o).

If the contact that is deleted does not have an associated account, then the tasks and events that have no value in the Related To field will be deleted. Without an account or existing Related To value, there is no context with which to associate the activities. Activities without a context are difficult to locate and have minimal value. Therefore, iTools allows these activities to be deleted when the associated contact is deleted.

SaveLimitedVisibility

This setting indicates whether tasks and events associated with a contact should be modified to retain 'visibility' when the contact's associated account has been cleared or set to a special account such as 'Unknown Employer'. Without iTools Employment Change Management installed, Salesforce.com will automatically restrict the visibility of all tasks and events associated with the contact to just the contact owner.

A valuable feature provided by iTools Employment Change Management is the ability to retain 'visibility' for tasks and events when the account name on the associated Contact is cleared or set as unknown. Special processing is performed by the iTool before the contact updates are saved. This processing updates the activities by placing the contact name in the activity description. The iTool will also associate the activity to the contact's previous account if that association doesn't already exist. Because of these updates, Salesforce.com will retain the current visibility of the activities when the change to the contact's account value is saved.

Set the value to **Y**(es) if it is important to your organization to retain the current visibility for tasks and events associated with contacts whose account name has been cleared or set as unknown. Otherwise, set the value to **N**(o).

SaveContext

This setting indicates whether tasks and events associated with a contact should be modified to retain 'account context' when the contact's associated account has changed.

When tasks and events have a Contact in the Name field and no value in the Related To field, Salesforce.com still shows those activities on the contact's Account Detail page. Because the Related To field is blank, if that contact changes employers, these activities no longer appear on the account page of the former employer but now appear on the new employer's page. These activities, displayed in the context of the wrong account, will not only cause confusion, but may even lead to incorrect actions.

For example,

1. A software company, TechCo, gives a demo of its product to a contact, Bob Michaels, while Bob is working for Company A.
2. Bob leaves Company A and is hired by Company B.
3. A user at TechCo updates Bob Michael's Account value to Company B in Salesforce.
4. When looking at the task and event associations in Salesforce, it appears as if TechCo provided the demo to Bob Michaels while he was at Company B. This would lead you to believe that Company B has been shown a demo of TechCo's product, when in fact, they have not. Conversely, the activity will not appear as associated with Company A and it will appear as if Company A has not been given a demo of TechCo's product, when in fact, they have.

A valuable feature provided by iTools Employment Change Management is the ability to retain 'account context' for tasks and events when the account name on the associated Contact is changed. Special processing is performed by the iTool before the contact updates are saved to associate the activity to the contact's previous account if that association doesn't already exist. Because of these updates, Salesforce.com will retain proper 'account context' for the activities when the change to the contact account value is saved.

Using the example above, since TechCo is using iTools Employment Change Management, the activities related to the demo given to Bob Michaels will appear correctly in the context of Company A, not Company B.

Set the value to **Y**(es) if it is important to your organization to retain the current account context for tasks and events associated with contacts whose account name has changed. Otherwise, set the value to **N**(o).

AutoFillRelatedTo

This setting indicates if iTools should automatically set the Related To field on a new Task or Event to the Contact’s associated Account. If set to **Y**(es), the Related To field on a new Task or Event will be populated with the Contact’s associated Account **IF** the Related To field is blank **AND** the Name field is populated with a Contact. If set to **N**(o), a blank Related To field will be left blank.

Limitations

Salesforce.com places execution limits on custom developed code to help ensure that no application, organization, or user utilizes a disproportionate share of resources. The limits cover everything from the number of records that can be read or updated to the number of email messages that can be sent. These limits are in place to help ensure a stable and scalable system for everyone but sometimes have the unwanted effect of limiting functionality. Due to these system limitations, iTools Employment Change Management has a few limits to the number of actions it can perform on any given employment related change. The limits you should be aware of are:

- A maximum of 10 email notices can be sent because of any given employment change.
    - Employment Change Management will only send one email notification to any given user, even if that user is the owner of multiple opportunities that are impacted by the change.
    - Email notifications based on a contact ***leaving*** an account are sent before email notifications based on a contact ***joining*** an account.
    - Email notifications are sent only when changes are made to a single contact. When updates to multiple contacts are made as part of a single process, such as Import or Mass Delete, no email notifications will be sent.
- The maximum number of database updates = 100 x the number of impacted contacts.
    - Employment Change Management will always create Employment History records before any other operation that requires a database update.
    - Tasks and Events are processed in a special order, giving a higher priority to those tasks and events that cause the greatest impact on a customer or prospect if they are not properly updated.

Licensing

iTools Employment Change Management uses the Salesforce.com package licensing mechanism to control which users have access to its functionality. A user will have proper access to all the Employment Change Management features only if they have been assigned a license to **both** iTools Employment Change Management **and** the iTools Configuration Manager.

Assignment of the Employment Change Management licenses determines which users will see features such as the Former Employer / Employee related lists and the Change Account button. Users who do not have an Employment Change Management license assigned to their account simply do not see most of the features. Your organization was given a large number of Employment Change Management licenses when the package was installed. This number is not necessarily the number of users that can be granted full Employment Change Management functionality because the tool also requires the assignment of an iTools Configuration Manager license.

A license to the iTools Configuration Manager package is required for a user to have access to the iTools Employment Change Management features as well as all other iTools. Your organization receives one Configuration Manager license for every iTools subscription it purchases.   **A user should *never* be assigned a license to the iTools Employment Change Management package without also being assigned a license to the iTools Configuration Manager package.** Without an iTools Configuration Manager license, a user will be able to see many of the features associated with Employment Change Management but accessing them will generate errors and/or result in unexpected system behavior that will only cause confusion.

InSitu Software uses the multiple package license approach to make it possible for customers to purchase iTools subscriptions for many, but not all their users. While we believe an iTools subscription for all Salesforce users is a valuable investment, we understand that such a decision is best left to the organization itself.

It is important for you, the System Administrator, to understand the impact license allocation and management will have on your users and their overall experience with iTools Employment Change Management. The information in the following sections should help with that understanding.

Employment History

Users that do not have a**n Employment Change Management license**

- Will not be able to see the list Former Employers list on the Contact Detail page.
- Will be able to see the list Former Employees list on the Account Detail page.

Users that have a**n Employment Change** ***Management licenses but do not have a Configuration Manager license***

- Will not automatically generate a new Employment History record when they edit a Contact and change its associated Account record. These users could leave "gaps" in the employment history of your contacts.

Unknown Employer

Users that do not have a**n Employment Change Management license**

- Employment Change Management package licensing has no impact on the Unknown Employer feature.

Users that have a**n Employment Change** ***Management licenses but do not have a Configuration Manager license***

- The Account field of a Contact saved with no associated account will not automatically be set to the site designated Unknown Employer account.

Change Account Wizard

Users that do not have a**n Employment Change Management license**

- Will not be able to see the Change Account button on the Contact detail page and thus not be able to use the iTools Change Account Wizard.

Users that have a**n Employment Change** ***Management licenses but do not have a Configuration Manager license***

- Will see the Change Account button but if the click it they will be presented with a message informing them they are not licensed for iTools.

Task/Event Context Preservation

***Users that do not have a*n Employment Change Management license**

- Employment Change Management package licensing has no impact on the context preservations features of iTools.

Users that have a*n Employment Change *Management licenses but do not have a Configuration Manager license

- The Related To field on a new Task or Event will NOT be set to the contact's associated account if that field is left blank and the feature is enabled.
- Tasks and Events will NOT be automatically saved when the contact they are associated with is deleted if the feature is enabled.
- Task and Event Related To fields will not be automatically updated to the contact's pervious employer before the new employer is saved if the Related To field was blank and the feature is enabled.

Employment Change Notifications

***Users that do not have a*n Employment Change Management license**

- Employment Change Management package licensing has no impact on the employment change notification feature of iTools.

Users that have a*n Employment Change *Management licenses but do not have a Configuration Manager license

- Email notices will NOT be set to Account and Opportunity Owners of impacted records if the employment change was made by a user that is not properly licensed.

Help and Support

Customer Focus is not just a phrase we toss around lightly at InSitu Software – it is the cornerstone of everything we do. Your success is vitally important to us. Whether you are a long-standing customer or just trying iTools for the first time with our no obligation free trial, if you are having trouble or just have a simple question we want to hear from you.

Email

This is our preferred method of providing support. It's not that we don't want to talk to you it's just that email is a much more efficient way to route your question/issue to the person who can best respond. We can also respond with more detailed instructions and screenshots.

Support@InSituSoftware.com

We are checking email all the time

Phone

If your question is easier to explain over the phone than in an email or you just want to hear a friendly voice, you can also call technical support at:

+1 (630) 557-9109

Monday thru Friday 9:00AM - 5:00PM CST