iTools

Configuration Manager

Configuration Guide

Last Revised: October 25, 2018

Welcome

Thank you for choosing iTools for Salesforce CRM by InSitu Software. If you recently purchased iTools, welcome to a robust collection of Salesforce CRM tools that will enhance your Salesforce CRM 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 CRM.

The iTools toolbox currently includes the following tools: Customizable Account Hierarchy, Delegated Tasks Management, Employment Change Management, Opportunity Status Monitor, State/Country Validation, and vCard Creator. The key to all of these tools is the iTools Configuration Manager. This configuration guide will lead you through the installation process and usage of this fundamental component.

About iTools Configuration Manager

The Configuration Manager is a prerequisite package and must be installed before any other iTool. All iTools share a common configuration setting mechanism called iTools Settings. From a single tab, the Configuration Manager allows the Salesforce Administrator to manage these iTools Settings for all tools in the iTools for Salesforce CRM collection. The iTools Configuration Manager provides support for organization and user specific settings and can be customized to manage only the iTools you have installed.

The iTools Configuration Manager also serves an important role in the licensing of iTools for your organization. While only the System Administrator should have access to the iTools Settings tab from the Configuration Manager, every iTools user will be assigned a license to this managed package. Details regarding managing iTools licenses can be found in the *Licensing* section of this guide.

Once iTools Configuration Manager is installed and licensed, you are free to install additional iTools from current, as well as future, releases of iTools for Salesforce CRM.

Lightning Support

The iTools Configuration Manager 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.

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Installation and Configuration Overview

This configuration guide is designed to lead you through the necessary installation and configuration steps. The tool itself requires no configuration but we recommend you review the *Licensing iTools* section to gain an understanding of how to properly license your iTools users. Although every effort has been made to provide complete instructions, if at any time, you encounter issues or have questions, please contact us using the methods described in the *Help and Support* section at the end of this document.

We try and keep this document as up to date with the current user interfaces and behaviors of the AppExchange and the Salesforce.com but with the relative newness of the Lightning User Experience and with three major Salesforce.com releases per year we sometimes fall a bit behind. If you find any inaccuracies in the installation or configuration instructions, please feel free to let us know so we can get them corrected. If the changes leave you in a situation you can't figure out, please contact us and we will be happy to walk you through the steps that were impacted by a change.

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Before You Begin

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

If you are installing into a Professional Edition, your account Profile must be System Administrator. To install the iTools Configuration Manager 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.

Installing iTools Configuration Manager

The iTools Configuration Manager 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 Configuration Manager** by searching for "iTools Configuration Manager" or direct your browser to:

    https://appexchange.salesforce.com/appxListingDetail?listingId=a0N30000001O7e MEAS

> Make sure you are on the AppExchange listing for the **iTools Configuration Manager**. iTools for Salesforce CRM 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 are able to 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 and are using the Lightning user interface the next couple of steps may vary slightly in the details but the basic steps for staring the install will be the same.

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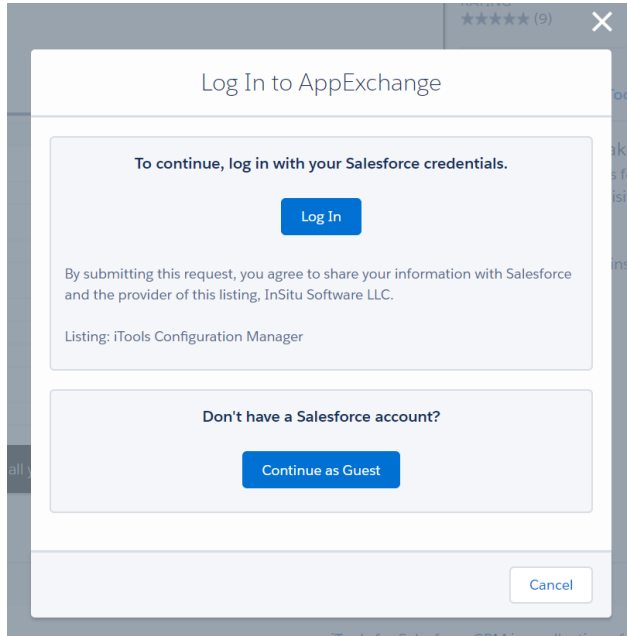
After logging in you may be returned to the iTools Configuration Manager listing page and will need to click the **Get it Now** button again.

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

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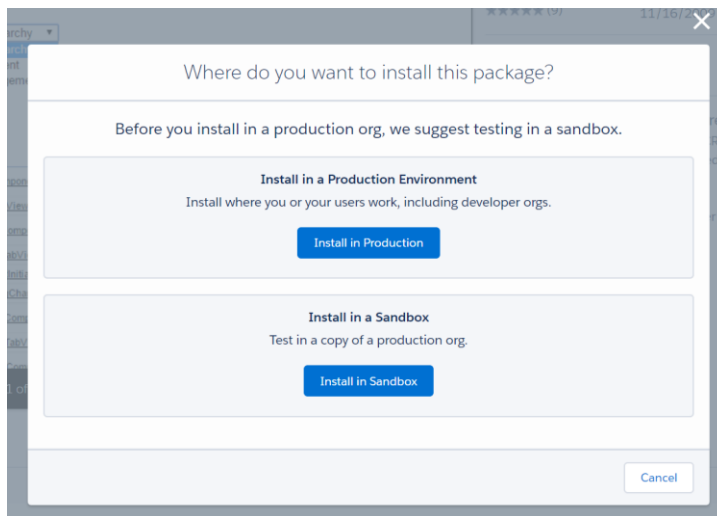
> If you are installing into a sandbox org, Salesforce may request additional login credentials for the specific sandbox org you will be using.

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.

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7. Choose the initial access to package resources.

   For administrators to be able to access iTools Configuration Manager to configure the behavior and user interface of all the packages in the iTools suite they must be granted permission to access the tabs, custom objects, custom fields, Apex classes, and Visualforce pages that make up the application. While each of your iTools users will need to be assigned a license to the iTools Configuration Manager package you should only grant access to its resources to your System Administrators. InSitu Software strongly recommends you choose the **Install for Admin Only** option.

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

8. Click **Install** to complete the installation process. The install of the iTools Configuration Manager 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.

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Licensing iTools

The Configuration Manager is a prerequisite package and must be installed before any other iTool. In addition to managing all the configuration options for each tool in the iTools suite, the Configuration Manager serves as the licensing mechanism for iTools. The number of licenses you have available for the Configuration Manager is based on the number of subscriptions to iTools that your organization has purchased.

There are several things to consider when allocating iTools licenses among your users.

- A single subscription to iTools entitles a single user to use any or all of the tools in the collection. In order for a user to use any of the iTools, you must allocate one of your Configuration Manager licenses to that user. You should never grant license to one of the other iTools packages to a user that has not been granted a license to the Configuration Manager.

- You don't have to purchase a subscription for every Salesforce user but the value of some of the iTools is greatly diminished when not licensed by everyone. Please review the *Licensing* section of each iTools you install to fully understand the impact of using that tool in an environment where not all Salesforce users are iTools users.

- Granting a license to the Configuration Manager does not automatically allow the user to access the iTools Settings tab or to change any of the settings for any of the other iTools. The iTools Settings tab should be accessible only to your Salesforce.com system administrators. Selecting the **Install for Admin Only** option during the package install ensured that only your administrators would be able change the configuration settings of any iTool.

- A package license is NOT automatically returned to the available pool of licenses when a user is deactivated. Please remember to remove a user's license to the iTools Configuration Manager when their account is made inactive.

Salesforce provides two ways to manage allocated licenses, by user or by package:

- To see which packages an individual user is licensed for or to add/remove a package license to/from a user, go to the User Detail page for that user account and scroll to the section labeled **Managed Packages.**

- To see which users have been assigned a license to an iTools package and to add/remove licenses to/from one or more users, go to the **Installed Packages** section in Setup. Find the package in which you are interested and click on the Manage Licenses link next to its name. iTools that do not use the licensing mechanism to control access will not have a Manage Licenses link next to them as they are installed with an unlimited number of user licenses.

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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

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