Sweet Hierarchy

User and Admin guide

DATE	VERSION	AUTHOR	CHANGE
22th April 2022	1.0	Oli Nepomiachty SugarCRM Labs	Initial document

OVERVIEW

The Sweet Hierarchy is a Sugar add-on designed by the SugarCRM Labs and sold on SugarOutfitters. It is a productivity tool that helps the user getting a consolidated view of a customer.

Use Case

When selling to a corporate group, it might be difficult to understand the relationship between the accounts, who are the key players, where the business is. The Sweet Hierarchy provides in the blink of an eye a comprehensive view of the account.

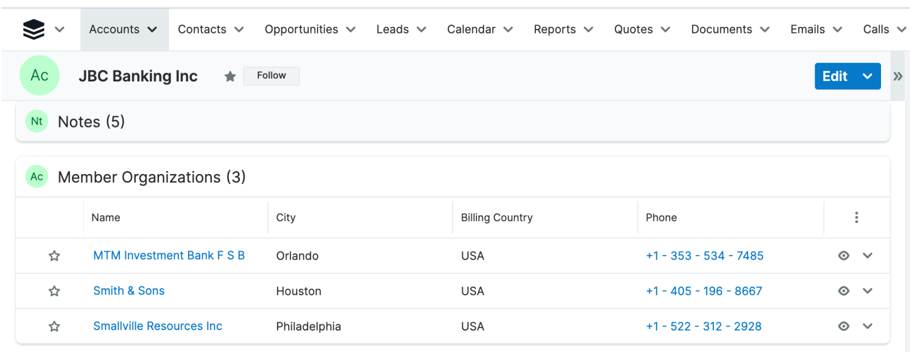
User Guide

Data Requirement

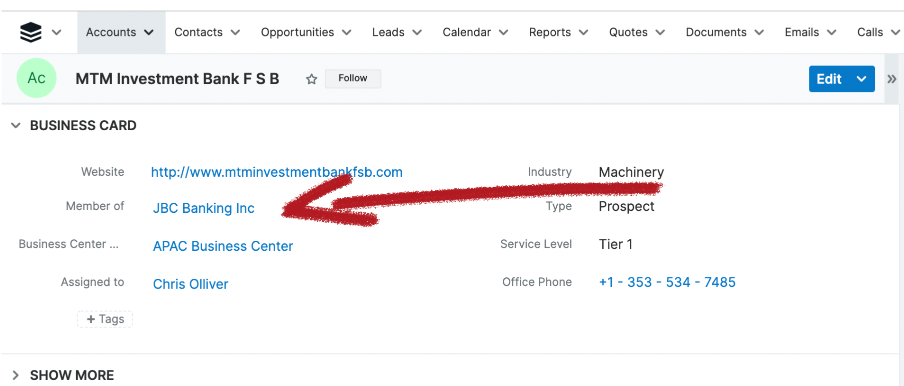
Create a hierarchy between your accounts, contacts.

Accounts

Add sub companies: from the account record view, scroll down to the sub panel "Member Organizations". Link companies from here.



Add a parent account: add the parent account from the field "Member of".



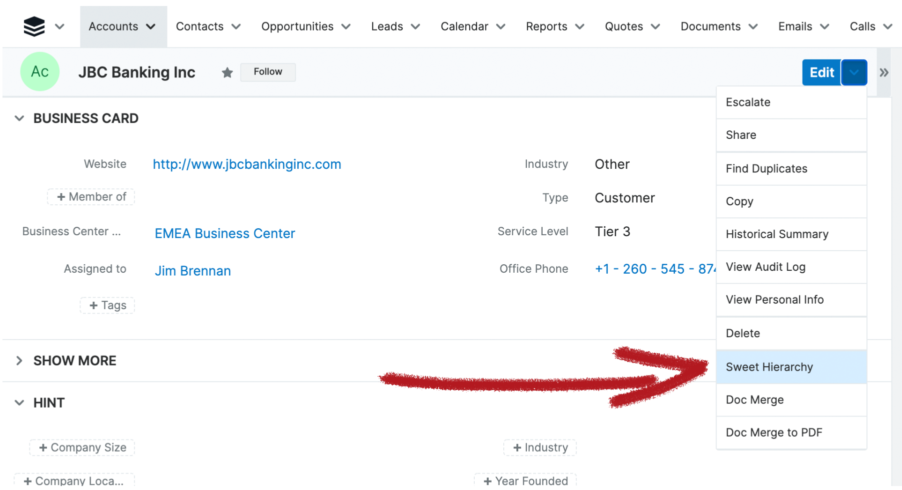
Contacts

The requirements are similar. The contact manager is identified with the field "Reports to".
The contacts who report to the current contact are listed in the sub panel called "Direct Reports".

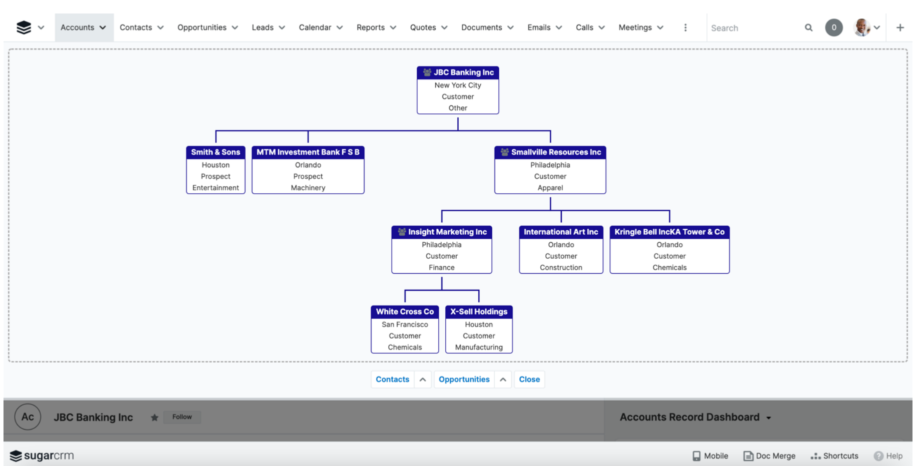
Account record

Getting Access

From the account record view, open the dropdown menu from the “Edit” button and select “Sweet Hierachy”.

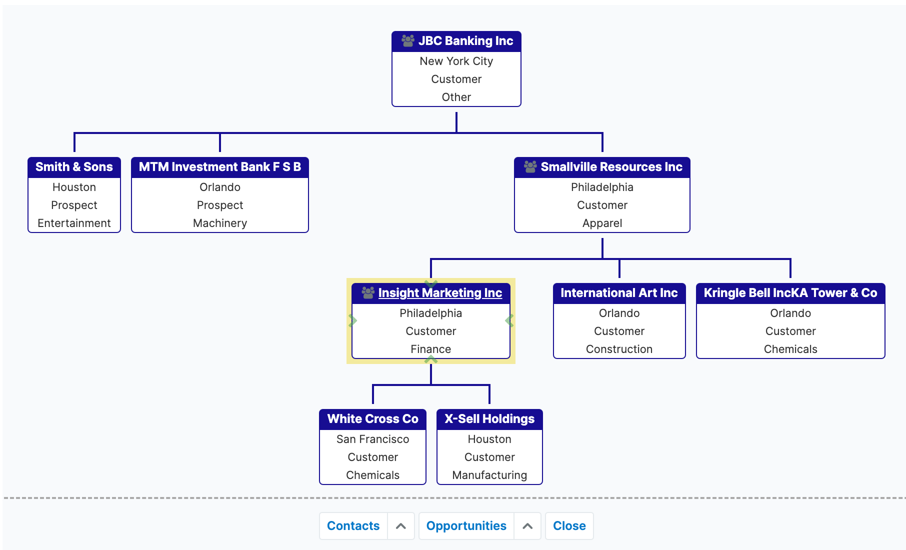


It will open the hierarchical view within a drawer. Be aware that Sweet Hierarchy will always show the full hierarchy from the top account. If the view is larger than your screen, you may scroll within the view, maintening a click and moving your mouse.



Zoom in

If you want to start the view from a specific account, bring the mouse cursor over the account card and click on the top highlighted border of the card.

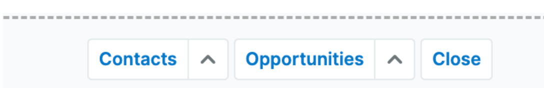


The view will be limited to this branch of the hierarchy.

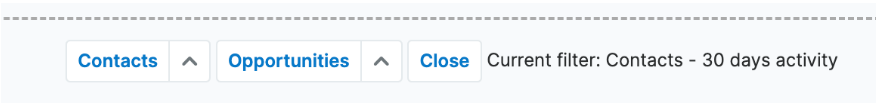
Clicking again on the top highlighted border will restore the full view.

The Filters

There are two buttons at the bottom of the drawer that control the filters. Each button has a dropdown to select a filter.



When clicking on the button itself, the filter “All records” is selected. The filter description is visible next to the buttons:



After applying a filter, clicking on the button will switch to the “All” filter. Clicking a second time will reset the hierarchical view hidding the records (Contacts or opportunities).

Contacts filters

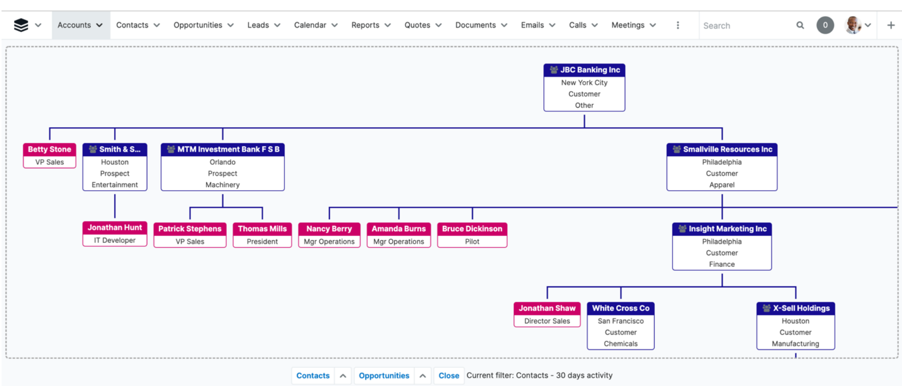
The contacts are shown below each account. The view is flat, it does not reflect the contact hierarchy because it would highly complexified the view. To see the contact hierarchy you must open the Sweet Hierarchy from a contact record.

There are 3 filters:

- All Contacts: all the contacts are shown.
- Activity in the last 30 days: show the contacts with an activity that occurs in the last 30 days
- Activity in the last 90 days: show the contacts with an activity that occurs in the last 90 days

An activity is a CRM event that is connected to the contact. In short, we rely on the “activities” table in the system. This table creates a new record everytime the contact is modified or a related record is added to the contact (like a new call, meeting, email, etc.)

Example: account hierarchy, with the contacts added, using the filter ”activity in the last 30 days”:



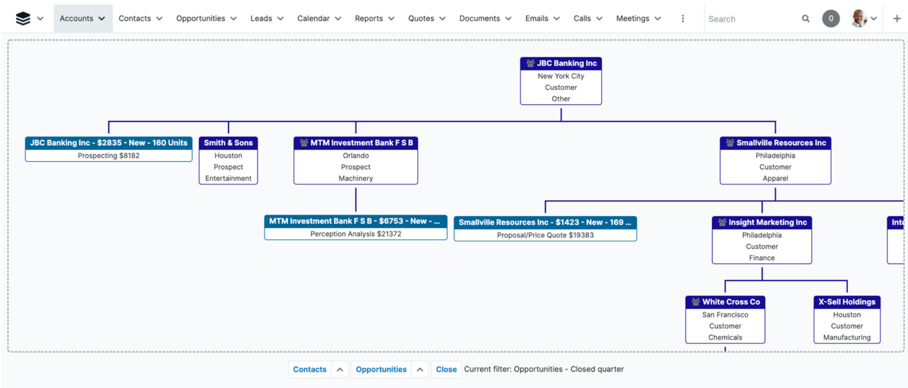
Opportunities filters

The opportunities filters work the same way.

There are 3 filters:

- All Opportunities: all the opportunities are shown.
- Closed Won: show all the closed won opportunities.
- Closed date this quarter: show the opportunities in progress with a closed date this quarter.

Example: account hierarchy, with the contacts added, using the filter ”activity in the last 30 days”:

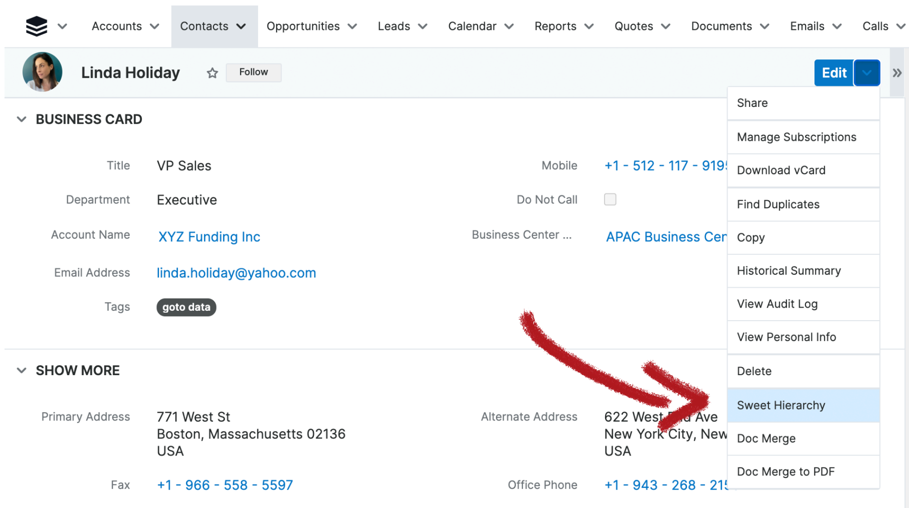


Direct Click

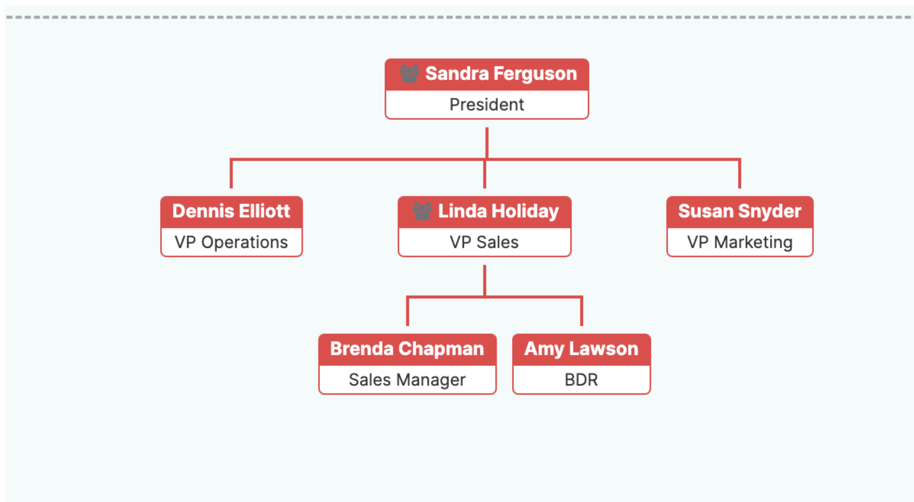
When clicking on a record name (account, contact, opportunity) it opens the record.

Contact record

From the contact record view, open the dropdown menu from the "Edit" button and select "Sweet Hierachy".



It will open the hierarchical view within a drawer. Be aware that Sweet Hierarchy will always show the full hierarchy from the top contact. If the view is larger than your screen, you may scroll within the view, maintening a click and moving your mouse.



Zoom in

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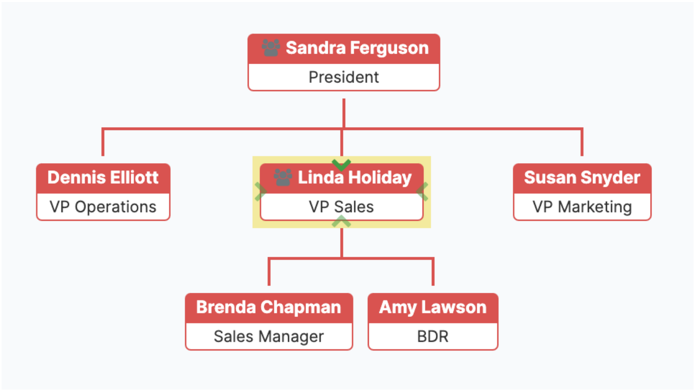
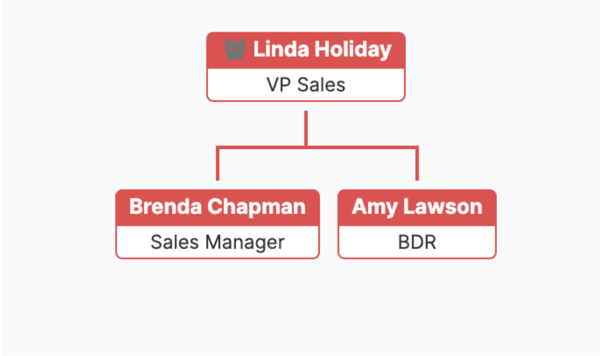


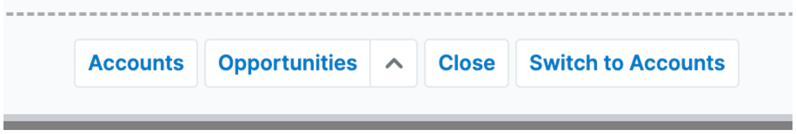
The view will be limited to this branch of the hierarchy.



Clicking again on the top highlighted border will restore the full view.

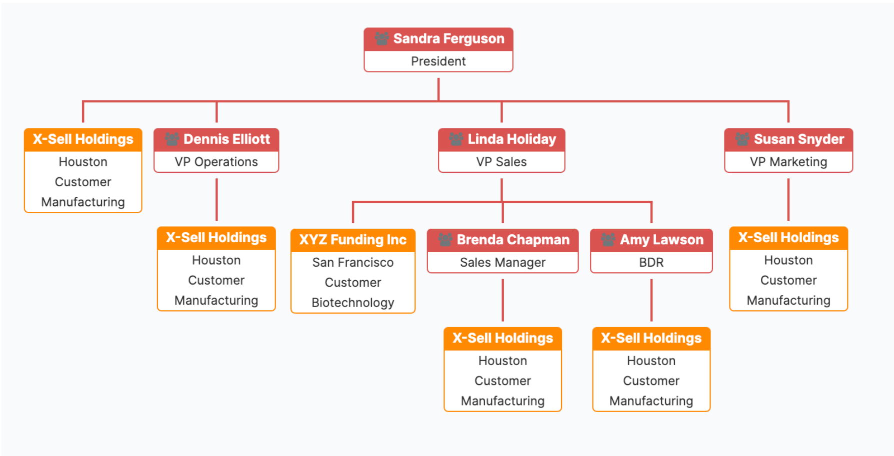
Buttons bar

There are three outstanding buttons that work differently from the account view.



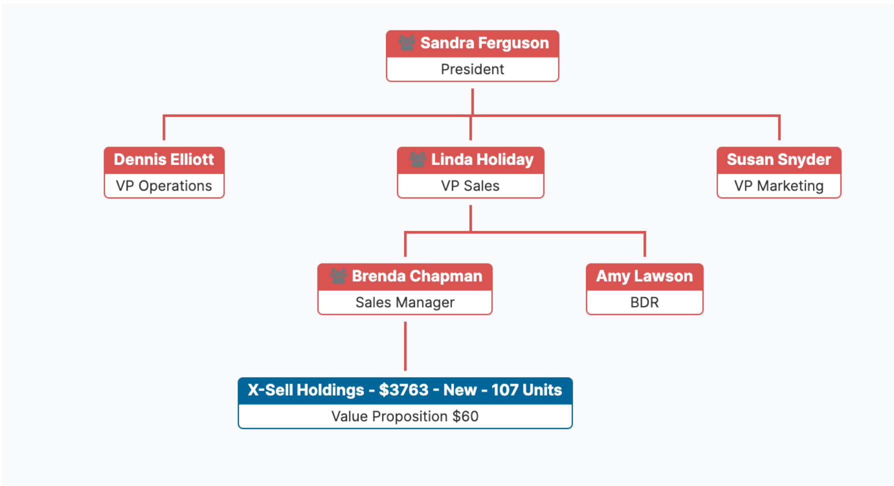
Accounts:

It adds the account for each contact. This view only makes sense if the contacts are not attached to the same account. It might happened with big corporations.

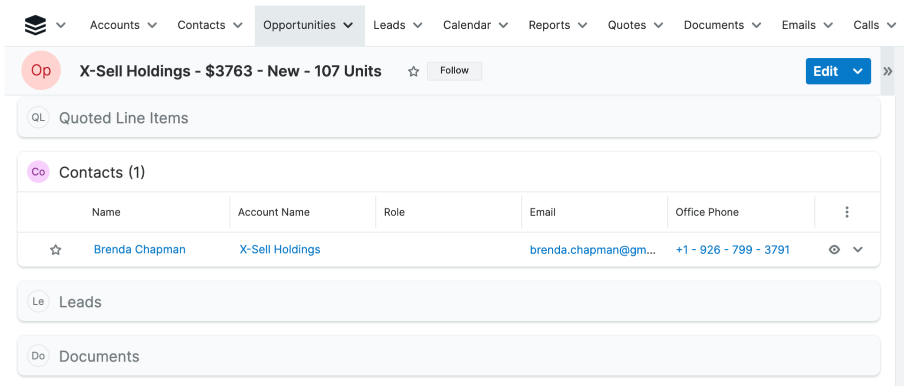


Opportunities:

Add the opportunities below the contacts. It shows only the opportunities where a contact (in this hierarchy) is attached to:

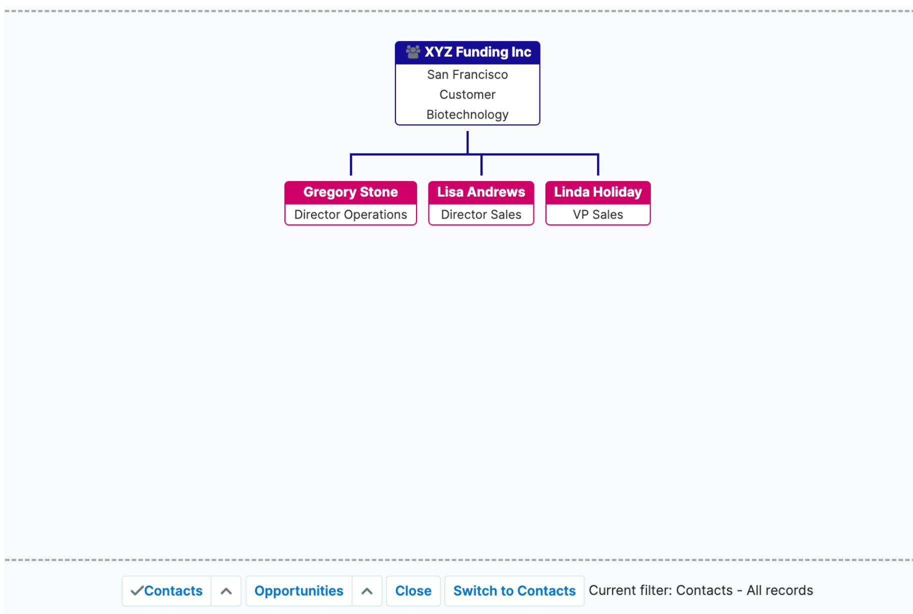


On the opportunity record view, sub panel “Contacts”, we see that Brenda Chapman is a contact for this opportunity:



Switch to Account:

This button toggles to the account view. From that view the contacts filters are still active. E.g. adding the opportunities will only add the ones that are linked to a contact.

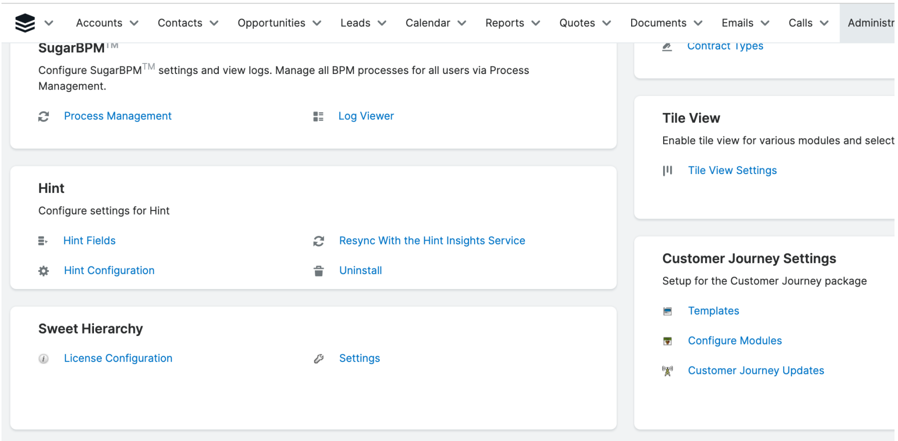


Switch (back) to Contacts:

The button “Switch to Contacts” will bring back to the original view.

Admin Guide

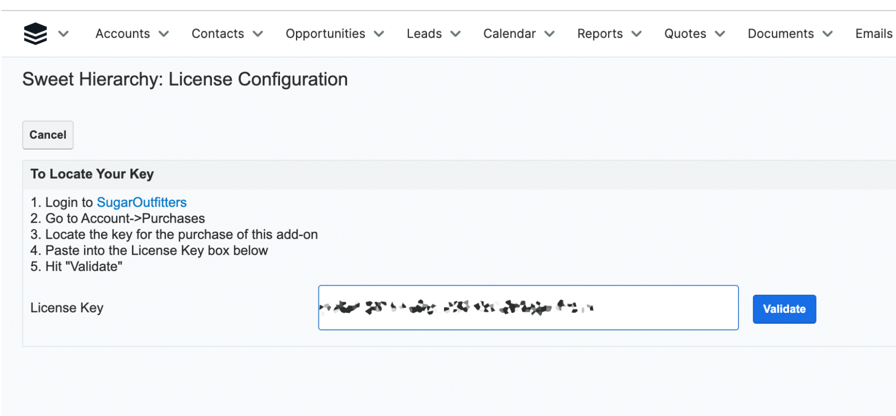
There is a new admin section called “Sweet Hierarchy”:



It will help you to enter the license key and configure the cards layouts in the hierarchical view.

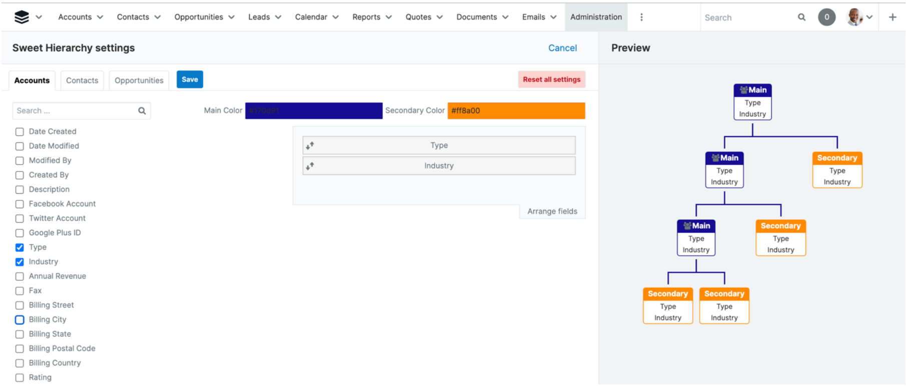
License

You received a trial key or subscription key from SugarOutfitters. This key is compulsory to use the add-on. Copy/paste the key to the box and hit “validate”. There should be a successful message on the screen.



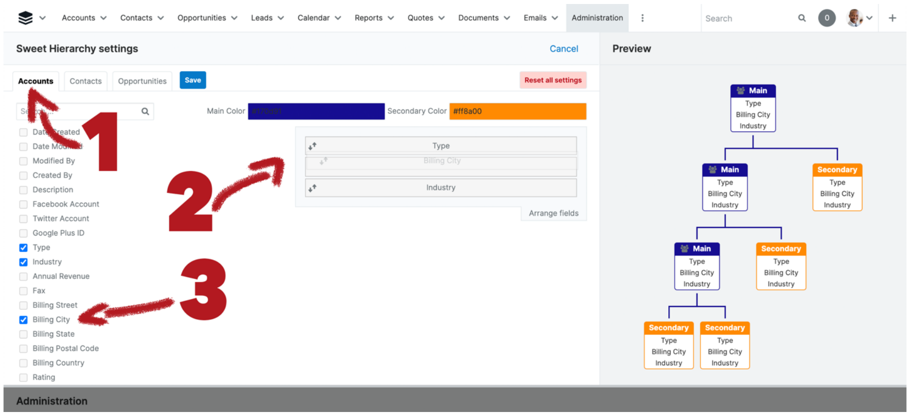
Configuration

Step 1: select a module (account, contact or opportunitiy)



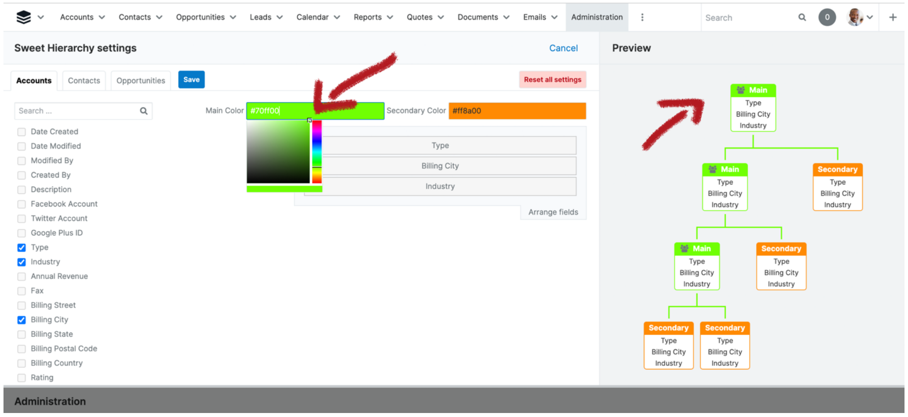
Step 2: select up to 3 fields to be added to the card

Step 3: re order the fields with drag and drop



Step 4: change the colors

Pick up a color, see the preview.



Step 5: Save

You may revert the settings to the defauly configuration with the button “Reset All Settings”.