



# TrustSphere

Because Relationships Matter

## Relationship Analytics For Sugar v1.2.3 User Guide



# Preference

- Welcome to Relationship Analytics
  - Providing new insights and tools for SugarCRM
  - Your administrator will have installed the package and deployed the relationship information to the required page layouts
  - The following pages provide a quick guide for the user to take advantage of the features available

# Using the features

- Relationship Analytics information is available as easily added dashlets
  - Navigate to the dashboard of the required page
  - Click the down arrow next to the create button on the dashboard and select edit.
  - Then add a row, a column and add a dashlet,
  - Select one of the TrustSphere dashlet(s)
- Add more dashlets as required. Combining multiple dashlets builds powerful insights.
  - Summary charts provide at-a-glance status of the communication activity or relationship
  - Lists detailing message flows or relationship strengths show how persons are interacting
  - Discover existing relationships that can be leveraged and whom is closest to the customer
  - Are there hidden links within the organisation to new contacts or leads
  - Individual dashlets are described in detail on the following pages

# Dashlet – Customer Interaction 360

- Lists latest interactions with a Contact, Lead, Account, Opportunity or Case
  - Details the date and time of the interaction, whom it was between
  - Subject of the interaction may be shown if configured by the administrator

The screenshot shows a dashlet titled "TrustSphere : Customer Interaction 360". It displays a list of three interactions. Each entry includes a calendar icon, a time indicator (e.g., "10 hours ago"), a sender and recipient email address, and a subject line. The first two entries are from "Hotels.com" and the third is a "call" from a phone number. A "2 further interactions" link is at the bottom. Callout boxes with arrows point to specific parts of the entries: "Time and Date of interaction" points to the time indicator, "Sender and recipient" points to the email addresses, "Subject line (display is configurable)" points to the subject line, and "List further interactions" points to the bottom link.

Time and Date of interaction	Sender and recipient	Subject line (display is configurable)
10 hours ago	sheila.johnson@company.com → david.tholt@sarofim.com	Hotels.com
10 hours ago	sheila.johnson@company.com → david.tholt@sarofim.com	Hotels.com
19 days ago	865282311413409 → 719971126169646	call

- Configuration options
  - Number of interactions to display (3 to 30)
  - Auto refresh period (1 to 30 minutes and off)
  - History to display (last 7 to last 120 days)

# Dashlet – Relationship Strengths

- Shows established communication relationships with a Contact, Lead, Account, Opportunity or Case
  - Lists the status (low, medium, high) of the strongest relationships from the local company



Strength is a TrustSphere metric indicating whom has an established and active communication relationship

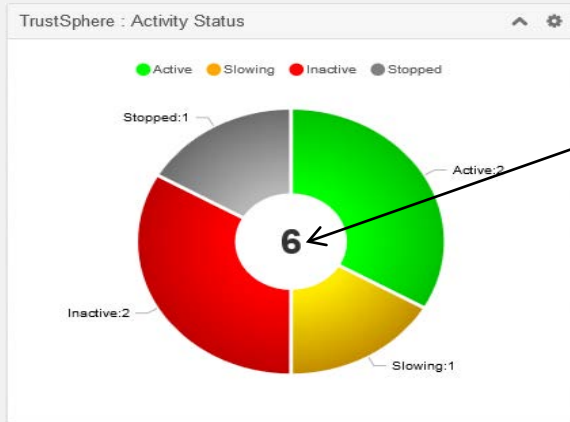
It is dynamically assessed using criteria such as :

- Consistency
- Cadence
- Activity
- Recency

- Configuration options
  - How many of the strongest relationships to display (10 to 50)
  - Allow scrolling or display all data in window

# Dashlet – Activity Status

- When was the last communication with a Contact, Lead, Account, Opportunity or Case
  - All communication is summarised into four activity categories



Number of local persons with a communication relationship

Colour coding if activity within :

Active : 10 days

Slowing : 20 days

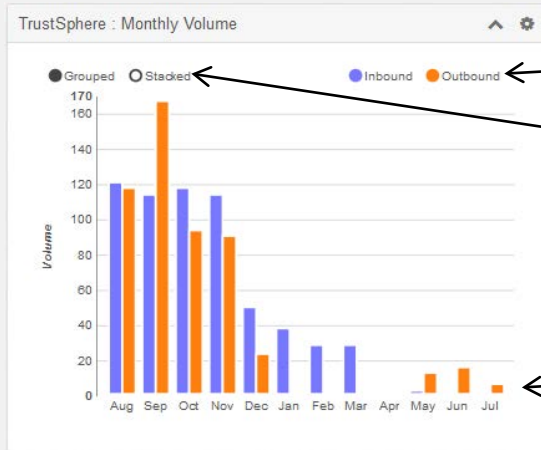
Inactive : 30 days

Stopped : After 90 days

- Configuration options
  - Number of most recently active relationships to consider (10 to 50)

# Dashlet – Monthly Volume

- The volume of messages with a Contact, Lead, Account, Opportunity or Case
  - Shows the total of inbound and outbound communication per month, for the last year



Select Inbound or outbound to show individual directions

Select grouped to show grand monthly totals

Values for the previous twelve months, with the current month shown at right

- Configuration options
  - Select the round graph buttons to configure the bar graph

# Dashlet – Missing Contacts

- List un-identified relationships with an Account
  - Shows connections with the account, not associated with existing contacts
  - These may be potential new contacts or important relationships with other local persons

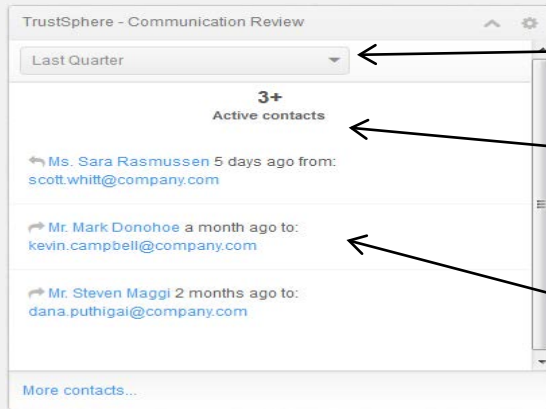
The image displays two screenshots of the TrustSphere 'Missing Contacts' dashlet. The top screenshot shows a list of three missing contacts, each with a plus sign, an information icon, a green bar representing relationship strength, and an email address. Callouts point to the green bar ('Relationship strength'), the information icon ('Show further information'), and the text '27 further communications' ('Number of potential contacts'). The bottom screenshot shows a detailed view of a contact, including a plus sign, information icon, green bar, and email address. Callouts point to the plus sign ('Create new Contact'), the information icon ('Further Information'), and the list of contacts below ('Listing of potential contacts Ordered by relationship strength').

- Configuration options
  - How many of the strongest relationships to display (1 to 30)
  - History to consider (days) when searching for activity (7 to 120)



# Dashlet – Communication Review

- Summarises the latest communication activity for Account and Opportunity
  - Provides at a glance “Aide memoir” of the latest communication status
  - Shows only messages with the configured account or opportunity contacts



Time period to show activity stream information

Number of contacts active in the period (+ indicates more than configured to be listed)

Communication activity shown as :  
Direction as → inbound or ← outbound  
Contact name  
Time since activity  
With whom was the communication

- Configuration options
  - How many activities to display information (1 to 30)

# Dashlet – LinksWithin

- Finds who within the local company already communicates with a person
  - Person of interest is selectable from dropdown

The image shows two screenshots of the TrustSphere LinksWithin dashlet. The left screenshot displays a network graph of contacts, with a 'Refresh search' button and a 'Show list' button highlighted. The right screenshot displays a list of contacts with their activity status and relationship strength, with 'Activity status' and 'Relationship strength' highlighted.

Contact	Activity Status	Relationship Strength
lysa.smith@company.com	LAST CONTACT THIS MONTH	STRONG
ray.portz@company.com	LAST CONTACT THIS MONTH	MEDIUM
alan.goodell@company.com	NO RECENT CONTACT	MEDIUM
dana.puttingai@company.com		WEAK

- Configuration options
  - How many of the most recently active to include in selection from account or opportunity
  - How many display rows to use (5 to 30)

# Dashlet – Search for LinksWithin

- Finds existing communication with unknown or recently introduced people
  - Identifies whom within the local company already knows the person
  - Provides summary and details of previous communication

The screenshot shows a web interface titled "TrustSphere : Search for LinksWithin". At the top, it displays "5+ active connections with cinergy.com". Below this, there is a list of contacts, each with a green profile picture, an information icon, and an email address. The first contact is "chris.hain@company.com", followed by "john.davis@company.com", "ray.portz@company.com", "kim.quenet@company.com", and "dana.puthigai@company.com". Above the list, there is a summary of communication: "Latest received 4 days ago Total received 1365" and "Latest sent 4 days ago Total sent 1362".

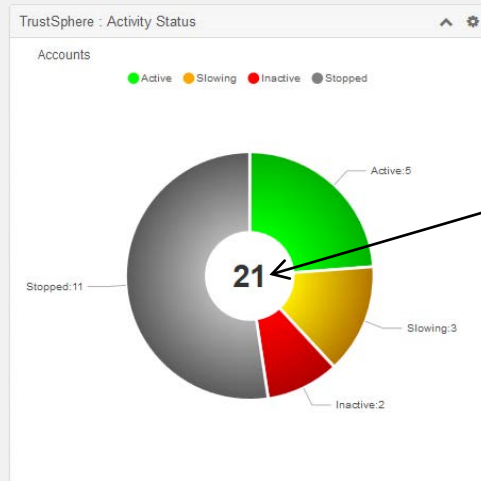
Callouts from the slide:

- "Create new Contact" points to a plus sign icon in the top left of the dashlet.
- "Show information" points to an information icon next to the first contact.
- "Number of local persons in communication (+ indicates more than configured to be listed)" points to the "5+" text.
- "Listing of local persons Ordered by relationship strength" points to the list of contact names and email addresses.

- Configuration options
  - The email address or domain of the unknown person(s)
  - How many of the active relationships to display information (1 to 30)
  - History to consider (days) when searching for activity (7 to 120)

# Dashlet – Activity Status Summary

- Summarises the activity status for the current users' Accounts or Opportunities
  - All communication is summarised into four activity categories



Select Accounts or Opportunities to display

Number of accounts or opportunities with activity

Colour coding if activity within :

Active : 10 days

Slowing : 20 days

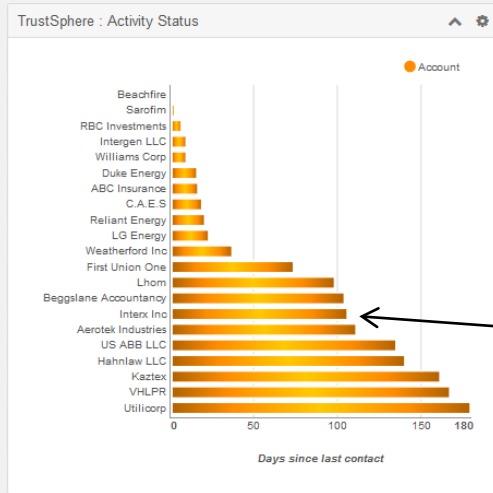
Inactive : 30 days

Stopped : After 90 days

- Configuration options
  - Display accounts or opportunities
  - How many of the strongest relationships to display (10 to 100)
  - Auto refresh period (1 to 30 minutes and off)

# Dashlet – Activity Status Summary

- Summarises the activity status for the current users' Accounts or Opportunities
  - All communication is summarised into four activity categories



Select Accounts or Opportunities to display  
Configure the chart to show all information or to show a scrollable window for greater detail

Days since last communication in ascending order

- Configuration options
  - Display accounts or opportunities
  - How many of the strongest relationships to display (10 to 50)
  - Allow scrolling or display all data in window
  - Auto refresh period (1 to 30 minutes and off)

# Field – Transition report (Employee detail page)

- Create an employee transition report
  - Provides a hyperlink to the TrustSphere transition report page
  - A listing of the employee relationships and associated relationship metrics

Transition report: [Transition report](#)

Transition report: [Transition report unavailable](#)

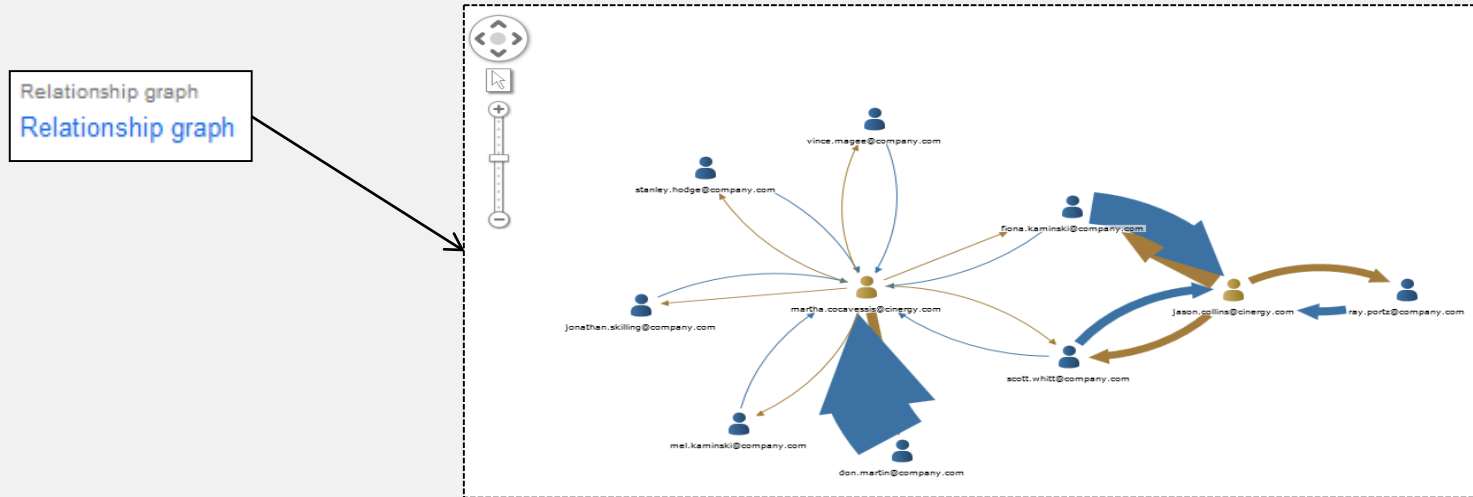
The report requires an email address to be configured for the employee

Contact Domain	Contact Address	Type	Trustscore	Latest Contact	Latest In	Latest Out	Received	Sent
company.com	barry.boyd@company.com	00	100	296 days	05 Nov 2015	25 Jul 2016	0	579
company.com	roseann.causholl@company.com	00	100	183 days	13 Oct 2016	15 Nov 2016	0	69,213
company.com	mel.kaminski@company.com	00	100	today	05 Nov 2015	17 May 2017	0	10,942
company.com	alan.goodell@company.com	00	100	today	05 Nov 2015	17 May 2017	0	12,143
company.com	jonathan.skilling@company.com	00	100	today	05 Nov 2015	17 May 2017	0	10,930
company.com	dan.magee@company.com	00	100	today	05 Nov 2015	17 May 2017	0	4,548
company.com	scott.white@company.com	00	100	today	05 Nov 2015	17 May 2017	0	4,535
company.com	lysa.smith@company.com	00	100	26 days	05 Nov 2015	21 Apr 2017	0	3,245
sarofm.com	david.thor@sarofm.com	00	100	today	04 Nov 2016	17 May 2017	0	205
company.com	ray.port@company.com	00	100	today	05 Nov 2015	17 May 2017	0	3,347
company.com	flona.kaminski@company.com	00	100	18 days	10 Mar 2016	28 Apr 2017	0	1,039
company.com	dana.putigali@company.com	00	100	7 days	10 Mar 2016	09 May 2017	0	282
company.com	richard.mchay@company.com	00	100	7 days	05 Nov 2016	09 May 2017	0	16
company.com	dement.beach@company.com	00	100	347 days	10 Mar 2016	03 Jun 2016	0	14
company.com	larry.thomas@company.com	00	100	323 days	05 May 2016	27 Jun 2016	0	4
company.com	don.martin@company.com	00	100	312 days	19 May 2016	08 Jul 2016	0	6
company.com	john.mccormier@company.com	00	100	236 days	22 Sep 2016	22 Sep 2016	0	3
company.com	mick.brown@company.com	00	100	127 days	09 Jan 2017	09 Jan 2017	0	1
company.com	mike.pimenov@company.com	00	100	103 days	10 May 2016	02 Feb 2017	0	25

- Configuration options
  - The SugarCRM administrator grants user access to report by assigning the specific role 'TrustSphere transition report'

# Field – Relationship graph (Account, Opportunity, Contact, Lead)

- Explore relationships within the TrustSphere TrustView graphical tool
  - Provides a hyperlink to the TrustView tool
  - A graphical view that can be navigated and explored in greater detail



# Communication Summaries

- Information available to be deployed by the SugarCRM administrator to Accounts, Opportunities, Contacts and Leads pages

These fields and subpanels summarise all the underlying activity and provide information about the latest communication

The information is also provided in easier to see format via the TrustSphere dashlets

- The SugarCRM administrator will need to add the additional fields to the Record Layout of Account, Opportunity, Contact and Lead pages to make this information visible
- The SugarCRM administrator will need to add the additional fields to the Search Layout of Account, Opportunity, Contact and Lead pages to make this information available in searches or workflows.

The fields of the communication summaries provide details of the latest communication that has occurred.

The additional subpanels on the contact and lead pages provide details of the latest communication with anyone at the local company.



# Fields – Communication Summaries

- Latest communication information for Contact, Lead, Account and Opportunities
  - Identifies whom has been most recently in communication and when
  - Updated as communication occurs, providing information to use in reporting and workflows

**Last in:** Date and time of last inbound communication

**Last out :** Date and time of last outbound communication

**Last Contact :** Date and time last of communication

**Contacted By :** Whom was last in communication

**Sync from Trustvault :** Enable or Disable information update from TrustVault (Contact and Lead)

**TrustView:** Hyperlink to TrustView application for relationship visualisation and exploration

**Converted from TrustVault:** Flag set if a contact is created from TrustVault search (Contact only)

**NOTE :** The information is also available in any contact or Lead subpanel that is added to a page.  
E.g. Accounts, Opportunities

# Subpanels – Relationship Summaries

- Whom has a relationship with a Contact or Lead
  - New subpanel on contact and lead pages is updated as communication occurs

<b>Name:</b> Contact or Lead name
<b>Local :</b> Local person who was last in communication (email address, phone number, etc)
<b>Remote:</b> Contact or Lead (email address, phone number, etc)
<b>Last in:</b> Date and time of last inbound communication
<b>Last out:</b> Date and time of last outbound communication
<b>Received:</b> Grand total of inbound messages
<b>Sent:</b> Grand total of outbound messages
<b>Monthly received :</b> Total of inbound messages by month (1 to 12)
<b>Monthly sent :</b> Total of outbound messages by month (1 to 12)
<b>TrustScore:</b> Status of relationship strength
<b>TrustScore value:</b> Value of relationship strength
<b>Last contact:</b> Date and time of latest communication