

A large, light blue geometric shape, resembling a stylized arrow or a mountain peak, is positioned in the upper half of the page. It is composed of several triangular and quadrilateral sections meeting at various angles.

Industrial CRM
Customer Hierarchy

USER GUIDE
Updated June 12, 2019

UPTAKE

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DISCLAIMER

We update Inventory frequently. This user guide will be updated on an ongoing basis and may have slightly outdated content due to the frequency of software updates. Please review the most current version of this guide regularly and with care.

TRADEMARKS

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CUSTOMIZATION

This user guide will show you how to use the Customer Hierarchy application with the assumption that your dealership has made the migration to CloudLink and your Customer Hierarchy application has been set up in a standard configuration. However, it should be noted that depending on your dealership's level of customization, or if your dealership hasn't migrated to CloudLink yet, your screens may look slightly different than those shown here.

Introduction

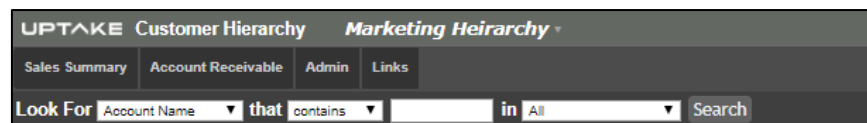
Welcome to Customer Hierarchy. This application allows you to capture, access, and share customer information, which over time will build an information base that becomes a significant asset to managing larger accounts.

NOTE: Customer Hierarchy currently only supports the Google Chrome browser.

Customer Hierarchy

Log in to CloudLink with your Username and Password, then click the **[ENTER]** button under **Customer Hierarchy**. You will be taken to the Sales Summary page.

Navigation Bar



At the top of the screen is a navigation bar that can be accessed from anywhere in the application. Access the four major views and search for a customer using the Navigation Bar.

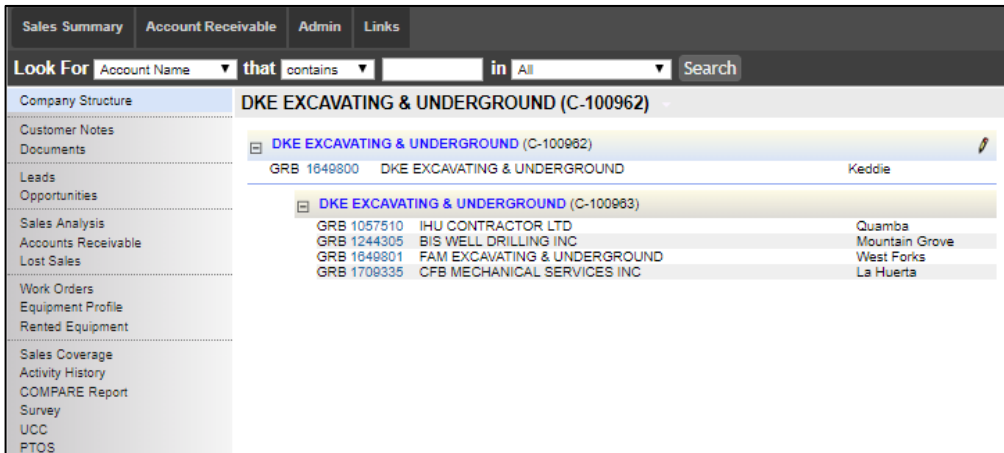
Search

For a basic search of customers by Account Name, Account Number, Company Name, and Company Number with the ability to filter by Hierarchy, use the Search Bar located in the Navigation Bar.

Company Information

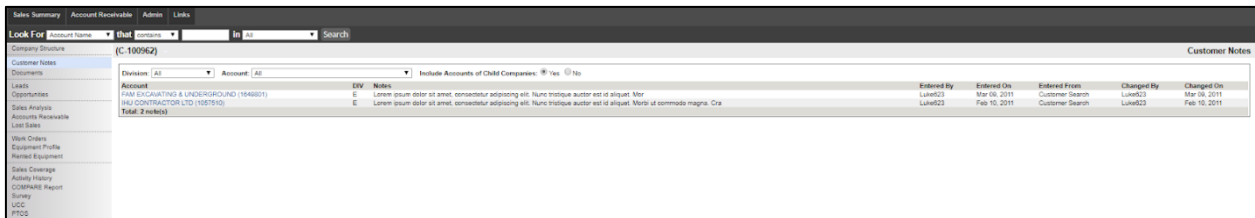
View more detailed customer information including company structure. Customer Hierarchy allows the user to view customer information at a high level or a detailed level.

Company Structure



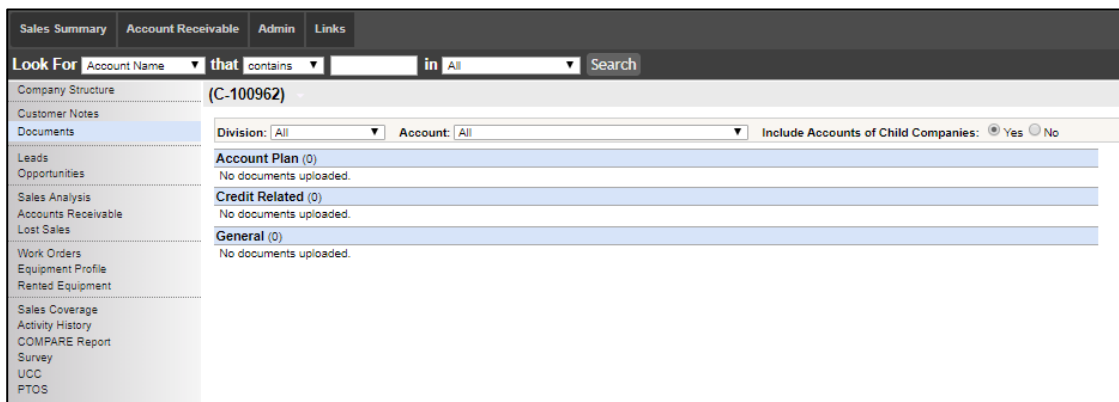
Companies can be organized in a hierarchical structure with other companies that fall under them. The lower level companies are **Child Companies**, while the higher level companies are called **Parent Companies**. View the structure of a company and the associated accounts with the Company Structure view.

Customer Notes



This section allows you and your colleagues to keep track of important information and ongoing discussions with the company.

Documents



The section allows you to file store any documents pertinent to a company or group of customers. This can include anything from pricing structure, discount programs, satisfaction survey results, and more.

Sales Analysis

Category	2015	2016	2017	2018	2019					
Total	7,418	108.8	4,737,354	22.8	2,326,177	24.1	1,174,858	18.2	538,887	35.8
Equipment	3,220,800	12.9	855,000	8.7	523,800	4.5	415,300	8.1	—	—
Parts	1,217,400	27.5	585,000	14.4	81,000	21.5	12,548	7.2	1,500	—
Service	30,400	18.4	81,000	21.5	12,548	7.2	1,500	—	—	—
Lease	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0	100.0
Online	35,520	28.1	378,861	28.7	174,842	29.7	270,695	20.7	159,819	16.4
Direct	38,408	21.3	681,881	21.2	870,870	22.7	588,254	19.0	487,210	21.0
Service	14,802	28.4	832,841	23.7	619,789	28.8	683,171	27.8	382,841	30.3
Total	86,228	24.6	1,571,883	23.3	1,727,681	27.8	1,432,881	23.3	1,219,779	34.8
Lease	1,581	75.8	410,260	75.8	410,260	75.8	447,223	71.1	398,168	75.3
Misc	7,807	45.8	234,704	50.1	88,810	27.7	133,554	34.0	80,311	45.4
Total	94,595	27.8	2,276,153	34.8	2,208,997	34.2	2,048,588	34.5	1,879,889	42.8
Grand Total	102,248	32.4	6,073,307	28.1	4,626,274	35.1	3,179,226	28.4	2,417,278	40.1

View a year over year history of revenue for the company with the Sales Analysis section. Drill down into a specific year to see revenue information in even greater detail.

Accounts Receivable

Category	0-30 days	31-60 days	61-90 days	Over 90 days	Unapplied Cash: (\$85,70)	Total
Parts	2,417.37	15,408.98	1,203.96	1,054.11		19,084.42
Service	4,467.81	6,487.81	1,238.34	(192.50)		12,001.46
Total	6,885.18	21,896.79	2,442.30	861.61		31,085.88

This section displays the current outstanding accounts receivable for the company. This view includes all divisions.

Equipment Profile

Manufacturer	1-3	4-6	7-10	10+	Unknown	Total
CATERPILLAR (AN)	12	20	10	220	10	262
INTEGRAL (MAN) (B)				10		10
JONAS (DEAR) (LS)		1				1
CM (CO)				2		2
MIL EQUIP (BND)				2		2
ROMAN (LTD) (BND)				2		2
LULL (CN)				1		1
UNKNOWN (B)				1		1
TRINCA CORPORATION (TX)				1		1
DEWB				1		1
EQUIPMENTAL	12	27	16	281	12	338

Each Company will have a view of their complete equipment list with all the details on each serial number. This view starts out with an aged view of equipment units categorized by the manufacturer. Each of these numbers represents the number of units in that category. Click into the numbers for more detailed information.

Activity History

Date	Time	Contact	Notes
From: Apr 24, 2017	To: Apr 24, 2018	All Dates	
Paul	Jun 07, 2016	Telephone	155710 CONTRACTOR LTD
Walker	Aug 19, 2017	Appointment	155710 CONTRACTOR LTD
Kemp	May 24, 2017	Telephone	124400 BSE BELL DRILLING INC
Tate	May 27, 2017	Telephone	124400 BSE BELL DRILLING INC
Kemp	Jun 12, 2017	Telephone	124400 BSE BELL DRILLING INC
Kemp	Jun 17, 2017	Telephone	124400 BSE BELL DRILLING INC
Walker	Jul 02, 2017	Appointment	124400 BSE BELL DRILLING INC
Jensen	May 28, 2017	Meeting	124400 BSE BELL DRILLING INC
Havens	May 24, 2016	Telephone	194800 EXCAVATING & UNDERGROUND
Blackwell	May 16, 2017	Meeting	124400 BSE BELL DRILLING INC
Blackwell	May 15, 2017	Telephone	124400 BSE BELL DRILLING INC
Blackwell	May 23, 2017	Telephone	124400 BSE BELL DRILLING INC
Wickhamer	Apr 26, 2017	Telephone	124400 BSE BELL DRILLING INC

View details of the latest dealer contact with a customer in the Activity History section. This section displays reports on any of the accounts included in the customer structure.

Sales Summary

Company No	Company Name	2015	2016	2017	2018	2019	Subtotal	2015	2016	2017	Subtotal	Total
C-40348	JMA PAVING	9,779,703	5,148,777	2,811,832	6,888,845	181,215	24,595,522	308,200	284,825	276,388	879,243	13,174,129,551
C-348073	TEKA ROADING & UNDERGROUND	5,074,285	1,111,818	1,430,281	4,882,184	16,388	12,504,946	537,239	413,862	240,389	1,191,490	14,697,727,156
C-464225	DVE PAVING	117,788	1,287,828	1,694,527	2,186,844	20,347	8,719,233	335,145	487,710	615,480	1,438,335	22,842,188,462
C-403070	ZON EXCAVATING & UNDERGROUND	954,985	1,583,443	1,587,439	647,820	5,963,867	105,743	647,878	300,000	89,830	1,037,706	6,327,325
C-403066	UBR CONSTRUCTION INC	347,835	486,287	1,704,878	1,851,337	11,881	4,385,149	100,834	446,779	276,415	258,059	65,491,128,279
C-403076	FFB CONSTRUCTION INC	149,195	1,038,800	895,916	1,586,470	0	3,160,371	122,663	106,409	108,892	338,964	3,713,788
C-403034	KOR CONSTRUCTION LTD	291,784	684,750	833,784	1,732,875	11,878	3,289,166	32,889	32,887	27,879	93,655	1,661,519
C-403082	DAL EXCAVATING & UNDERGROUND	2,888	129,245	387,849	1,638,875	40,759	2,289,587	270,831	162,466	117,611	426,867	8,274,832,549
C-403780	ZNA WELLS DRILLING INC	433,895	911,120	438,898	1,326,425	37,528	2,747,873	74,532	112,813	91,240	148,285	1,100,023
C-404151	BET MACHINERY SERVICES INC	200,000	5,141,109	140,887	0	0	2,814,022	0	0	0	0	2,814,022
C-403622	TBL CONTRACTOR LTD	554,676	46,180	440,449	1,336,194	140,728	2,567,146	30,887	85,708	10,938	33,188	1,178,218,130
C-403991	EEZ EXCAVATING & UNDERGROUND	1,147,342	314,347	582,895	277,300	0	2,321,884	66,338	69,887	170,328	141,852	3,171,495,956
C-404800	BSE EXCAVATING & UNDERGROUND	551,454	688,972	181,918	51,188	1,968	1,383,483	324,840	332,833	274,196	931,869	8,687,138,866
C-403038	TTY CONTRACTOR LTD	46,479	686,894	492,784	1,481,490	16,911	3,668,654	881	7,000	33,561	28,342	73,517
C-403022	YVA CONTRACTOR LTD	327,874	684,914	674,582	629,263	20,853	2,488,083	11,141	18,248	29,342	12,030	0
C-403889	KCH CONSTRUCTION INC	0	0	107,488	2,193,475	15,482	2,489,538	0	0	0	0	2,489,538
C-403987	891 CONSTRUCTION INC	323,328	0	0	1,284,244	0	2,329,252	7,884	15,167	25,809	38,859	2,344,070
C-403604	LEW CONTRACTOR LTD	0	2,209,211	0	15,860	0	2,224,271	0	0	0	0	2,224,271
C-403078	WVA CONTRACTOR LTD	0	0	0	0	0	0	511,880	482,850	638,180	1,632,910	20,169,179,723
C-403841	WNU CONSTRUCTION INC	0	0	5,800,852	273,752	2,882,454	8,957	0	0	0	0	4,616
C-403907	ZOB CONSTRUCTION INC	372,319	477,864	205,159	116,244	2,582	1,273,467	335,564	189,403	100,789	197,714	7,231,895,861
C-403985	NAF EXCAVATING & UNDERGROUND	389,283	539,740	894,874	521,585	182	2,064,565	1,852	2,355	2,856	0	9,930,281,655

View the revenue details for all of the companies that are set up in Customer Hierarchy with the Sales Summary page. This page displays a five-year historical view for Equipment and rentals as well as Parts and Service. This allows you to easily view trends. To see a company's details, click on the desired Company Number.

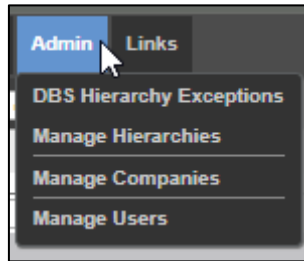
Click the drop-down menu at the upper left to filter for a specific group. Configure this drop-down in the admin menu under **Manage Hierarchies**.

Account Receivable

Company Name	Outstanding	0-30 days	31-60 days	61-90 days	Over 90 days	Total	Unapplied Cash
Sum	1,162,139.00	2,428,096.00	1,096,029.00	1,050,000.00	1,050,000.00	11,010,172.00	(102,814.24)
C 101006 ZIM CONSTRUCTION INC	101,170.00	502,071.00	173,615.00	173,615.00	173,615.00	2,028,096.00	(2,000.00)
C 101017 JDM CONSTRUCTION INC	728,236.00	3,034.00	16,122.00		3,290.00	730,778.00	(2,862.00)
C 101048 BSI MECHANICAL SERVICES INC	800,700.00					800,700.00	0.00
C 101077 PJP CONSTRUCTION INC	372,071.00	223,842.24	7,559.73	5,374.21		588,847.28	(5,084.10)
C 101082 HET WELL DRILLING INC	104,110.00	1,000.00				105,110.00	(100.00)
C 101083 NDR PAVING	441,000.00	86,739.41	104,439.00	104,439.00		736,617.41	(13,700.00)
C 101084 BSI MECHANICAL SERVICES INC	148,000.00					148,000.00	0.00
C 101091 JMS CONTRACTOR LTD	408,200.00	162,195.11	165,100.00		41,600.20	777,195.31	(1,624.60)
C 101092 NRC WELL DRILLING INC	482,176.00	28,891.00	21,789.70	22,867.31		555,724.01	0.00
C 101093 GSE EXCAVATING & UNDERGROUND	145,873.00	528,176.00	23,175.10	18,174.14		715,398.24	(889.70)
C 101094 GSE EXCAVATING & UNDERGROUND	192.00	578.00	6,100.41	60,851.14		67,621.55	(200.00)
C 101095 GSW WELL DRILLING INC	86,233.00	84,400.00	37,071.11	2,377.00		149,081.11	(40.00)
C 101096 GSW WELL DRILLING INC	62,084.11	48,407.11	17.88	69,861.00		120,569.10	(18,400.00)
C 101098 AGS CONTRACTOR INC	91,016.00	38,177.04	3,481.41	38,422.01		170,196.46	0.00
C 101097 GSE CONTRACTOR INC	21,847.40	124,210.00	2,734.40	4,732.01		153,523.81	0.00
C 101074 PJP CONTRACTOR LTD	2,012.26	322,841.41	10,212.00	374.00		335,440.67	(1,450.00)
C 101094 JMS CONTRACTOR LTD	21,847.40	108,139.11	1,142.20	700.00		131,828.71	0.00
C 101094 WJP WELL DRILLING INC	72,200.00	40,700.00	3,913.77			116,813.77	0.00
C 101095 PJS WELL DRILLING INC	117,000.00					117,000.00	0.00
C 101096 BSI MECHANICAL SERVICES INC	148,000.00	4,120.00		8,633.00		160,753.00	0.00
C 101098 GSE EXCAVATING & UNDERGROUND	32,861.11	48,110.00	20,371.00	27.00		81,370.11	(1,476.00)
C 101092 GSE CONTRACTOR LTD	28,891.00	16,100.00	3,011.00	5,711.00		53,713.00	(1,000.00)
C 101042 PJP CONTRACTOR LTD	(14,100.00)	45,422.01	40,139.14	20,344.00		91,825.15	(1,224.40)
C 101092 GSE EXCAVATING & UNDERGROUND	1,712.00	31,440.00	30,910.00	4,501.00		68,563.00	0.00
C 101094 JEP EXCAVATING & UNDERGROUND	3,720.00	30,026.00	2,804.00	48,014.13		84,564.13	(1,578.50)
C 101095 BSI MECHANICAL SERVICES INC	28,700.00	81,600.00	1,108.14			111,408.14	0.00
C 101098 DTI MECHANICAL SERVICES INC	17,214.00	38,418.00	28,344.00	0.00		83,976.00	0.00
C 101094 BSI MECHANICAL SERVICES INC	18,142.00	29,247.11	46,272.21	1,038.86		94,690.18	(2,422.00)
C 101092 VGL PAVING	50,200.00	4,302.00	5,739.04	10,302.01		70,543.05	(1,148.00)
C 101092 PJP CONTRACTOR LTD	28,891.00	19,247.11	19,420.00	3,008.90		60,567.01	0.00
C 101072 WOH EXCAVATING & UNDERGROUND	28,176.00	38,400.00	4,414.00			70,990.00	0.00
C 101092 PJP CONTRACTOR LTD	28,891.00	16,200.00	8,600.00			53,691.00	0.00
C 101093 BSI MECHANICAL SERVICES INC	58,004.00	1,000.00	1,100.00	48.00		60,152.00	(780.00)
C 101093 NRC EXCAVATING & UNDERGROUND	32,103.01	1,887.00	21,180.20			55,169.21	0.00
C 101097 PJP PAVING	23,000.00	23,000.00	5,000.00	0.00		51,000.00	0.00
C 101092 PJP CONTRACTOR LTD	1,887.00	(107,611)	16,402.10	20,949.04		40,799.03	(5,174.10)
C 101098 PJP CONTRACTOR LTD	48,411.00	48,411.00				96,822.00	0.00
C 101098 PJP CONTRACTOR LTD	18,206.00	8,200.00	12,816.10	10,861.00		49,893.10	(2,714.00)
C 101098 VOR EXCAVATING & UNDERGROUND	20,862.00	12,440.00				33,302.00	0.00
C 101098 VOR EXCAVATING & UNDERGROUND	39,010.00	3,040.00				42,050.00	0.00
C 101092 GSE EXCAVATING & UNDERGROUND	24,804.11	7,248.00	222.04			27,280.15	(3,088.00)
C 101096 BSI MECHANICAL SERVICES INC	29,007.00	10,780.00		200.00		40,007.00	0.00
C 101092 BSI MECHANICAL SERVICES INC	22,801.00	12,801.00				35,602.00	0.00
C 101091 HET WELL DRILLING INC	20,800.00	18,170.00	7,660.00			46,630.00	0.00
C 101091 PJP CONTRACTOR LTD	20,800.00	2,100.00	1,000.00	874.00		24,774.00	0.00
C 101098 NRC EXCAVATING & UNDERGROUND	18,200.00	1,000.00				19,200.00	0.00
C 101098 BSI MECHANICAL SERVICES INC	7,887.11	3,100.00	12,143.20	12,000.00		35,130.31	(2,751.00)
C 101098 PJP CONTRACTOR LTD	10,102.00	20,000.00	1,000.00			31,102.00	0.00

View accounts receivable information by company and filter by equipment, rentals, parts, service, and miscellaneous by clicking their respective buttons. The numbers include Accounts Receivable for all divisions and exclude unapplied cash.

Admin



The admin menu provides access to a configurable set of Administrative tools including user, hierarchy, and customer management. This menu item is customized during your system implementation.

Editing and Deleting Users



Click the pencil icon to edit the user type, add a user as an admin, or to add a comment for that user. Click the red X icon to remove a user.

Company Management

Sales Summary Account Receivable Admin Links			
Look For Account Name that contains in All Search			
Company Number	Company Name	Number of Accounts	Add New
C-100790	AAA Construction	7	
C-100568	Addison Clark	2	
C-100645	Blue Company	3	
C-101156	Brand Inc.	2	
C-100495	Buds and Company	2	
C-100860	Charles County	10	
C-100871	Closed Door Company	4	
C-100875	Cost & Co Construction	4	

Add and edit Companies on the Manage Companies page. In the **Admin** menu, click **Manage Companies**.

Add a New Company

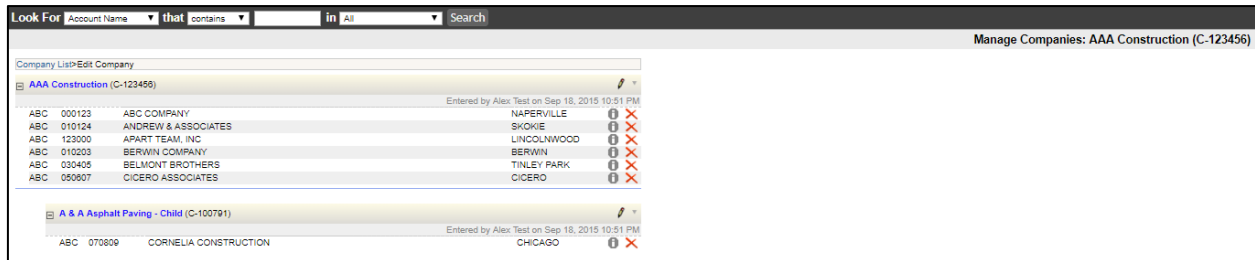
To add a new company:

1. Click **[Add New]** in the Company List header row.
2. Enter the name of the company in the dialog box that appears.
3. Click **[Add]**.

Sales Summary Account Receivable Admin Links			
Look For Account Name that contains in All Search			
Company Number	Company Name	Number of Accounts	Add Cancel
	<input type="text"/>		Add Cancel
C-100790	AAA Construction	7	
C-100568	Addison Clark	2	
C-100645	Blue Company	3	
C-101156	Brand Inc.	2	

Once saved, the new company will appear in the company list.

Editing a Company



Users have the ability to edit the name of a company, manage company accounts, as well as add and manage child companies. Click the pencil icon to the right of the desired company. This will take you to the **Edit Company** page. From there click the pencil icon drop-down and select the desired editing action.

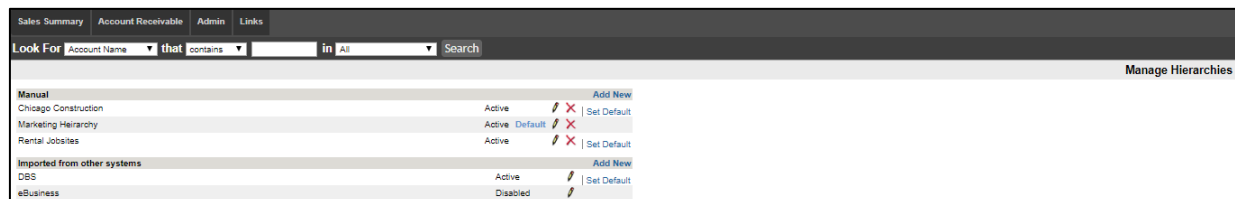


The following editing actions can be taken:

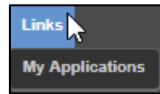
- **Edit** - allows you to edit the name of the company.
- **Delete** - allows you to remove the company.
- **Move** - allows you to relocate the company to another company hierarchy. Please note that the destination company number is required.
- **Add Child Company** - allows you to add a lower-level company under this company.
- **Add Account** - allows you to add company accounts by searching Customer Hierarchy as well as DBS accounts.

Managing Hierarchies

In the Admin menu, click **Manage Hierarchies** to add and edit the company groupings in the Customer Hierarchy drop-down at the top of the application. Click the pencil icon next to a hierarchy to set the Hierarchy as **Active** or **Disabled**, or set that Hierarchy as the default.



Links



Links on the Navigation Bar allows a user to create customized quick links to other applications from within Customer Hierarchy. This menu item is customized during your system implementation, or later when you decide what links you would like to appear here. **My Applications** is listed by default and navigates you back to the CloudLink Application selection page.