

ACCOUNT EXPLORER

Know the details. Act on the big picture.

For sales, service, and channel teams managing complex, multi-location accounts, Account Explorer gives SugarAI a visual, reportable, and actionable view of the whole customer hierarchy — not one record at a time.

Native SugarAI module · installs in minutes

Signal Textile Foundry Group

Acct Profile

Edit

HIERARCHY

- Foundry Group
 - East · Montreal
 - East · Hamilton
 - Services
 - Central · Billings

ROLLED UP

- Contacts **24**
- Opportunities **8**
- Cases **3**
- Meetings **12**

across 4 locations

ACTIVITY

- Discovery meeting
 - Group Scheduled
- Product demo
 - Central Held
- Proposal review
 - East Held

See the whole hierarchy, not just one record

Search a big customer in a flat CRM and you get a wall of near-identical names. Account Explorer turns that into one clear, living picture.

01 Visual hierarchy mapping

See the entire account structure as a tree — parent HQ, business units, and the locations underneath. Toggle it open for the full picture; click any branch and the whole screen scopes to it.

“Stop guessing how a customer’s organization fits together. See it.”

HIERARCHY

Signal Textile Foundry Group

L1

Foundry East · Montreal

Foundry East · Hamilton

Foundry Central · Billings

HIERARCHY ROLLUP

Contacts

Opportunities

Cases

Rolled up: Contacts (24)

Finley Mack

Foundry Central

Marie Campbell

Foundry East

Denise Owens

Foundry Group

+ 21 more, across 4 locations

02 Roll-up of related records

Pull contacts, opportunities, cases, and meetings up from every location into one place, at the level of the tree you choose. No account-hopping. No relying on memory.

“Everything about a customer’s hierarchy, in one place, at the same time.”

ACTIVITY TIMELINE

Search...

Discovery meeting

Foundry Group

Scheduled

in 2 days

Product demo

Foundry Central

Held

7 days ago

Proposal review

Foundry East

Held

20 days ago

03 Searchable engagement timeline

A chronological feed of every meeting and touchpoint across the hierarchy or any branch, from what’s next back through history — with full-text search to find the demo or the person in seconds.

“Tell the story of a relationship at a glance, not a folder at a time.”

Reporting across the hierarchy

Run existing Sugar reports against a whole hierarchy — and see where nothing’s happening.

Automated building & maintenance

Matches on domain, address, phone, or any custom field, and keeps the tree accurate as the customer grows.

Metadata for forecasting

Level, role, group, and rolled-up revenue on every account power account-based forecasting.

WHY IT MATTERS

One customer, a dozen records — until now

Every CRM stores accounts the same way — a name, an address, a pile of details. That works fine until a customer isn't one location. Search for a multi-branch account today and you get a wall of near-identical names, with no way to tell what's happening across any of them.

Foundry Service

Foundry Centra

Foundry East

The Foundry Group

— which one do you open?

IN PRACTICE

Where it shows up day to day



Business review prep

Open the top-level account before a QBR and see every deal, case, and meeting across every location at a glance.



Dealer and buying group performance measurement

Roll up sales activity, bookings, and revenue across hierarchies.



Multi-branch support

A call from an unfamiliar branch still opens with full context — every touchpoint the broader account has ever had.



Account-based forecasting

Forecast the true combined value of a complex account, not whichever fragment happens to be tracked on one record.

BUILT FOR

Manufacturers & distributors with multi-location customers

- Customer locations spread across geographic territories
- Franchise or multi-unit chain operations
- Dealer hierarchies or distributor channels
- Buying groups or co-op purchasing structures
- Multi-brand or multi-division product lines
- Regional accounts with several buying locations

WHY THIS, NOT THAT

Point tools do one piece. This does all four.

Standard CRM hierarchies

Shows the structure — no roll-ups, no timeline, no reporting against it.

Standalone hierarchy tools

Leans on Dun & Bradstreet numbers — less flexible for industries that define relationships differently.

Key-account planning tools

Standalone planning, not integrated hierarchy with roll-up, timeline, and reporting inside the CRM.



Account Explorer is the only one that combines visual hierarchy, roll-up analytics, a searchable timeline, and native reporting — natively inside SugarAI.



Part of TCP's Manufacturing CRM Accelerator

FREE TRIAL

Try it free on your own accounts.

Start a free trial — a native SugarAI module that installs in minutes, with no data migration.

Start your free trial →