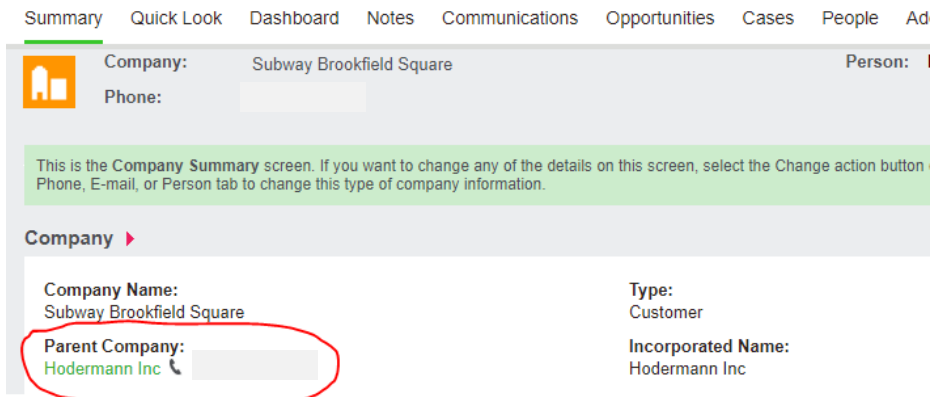


### SageCRM Enhancement: Adding Parent/Child Link functionality to SageCRM

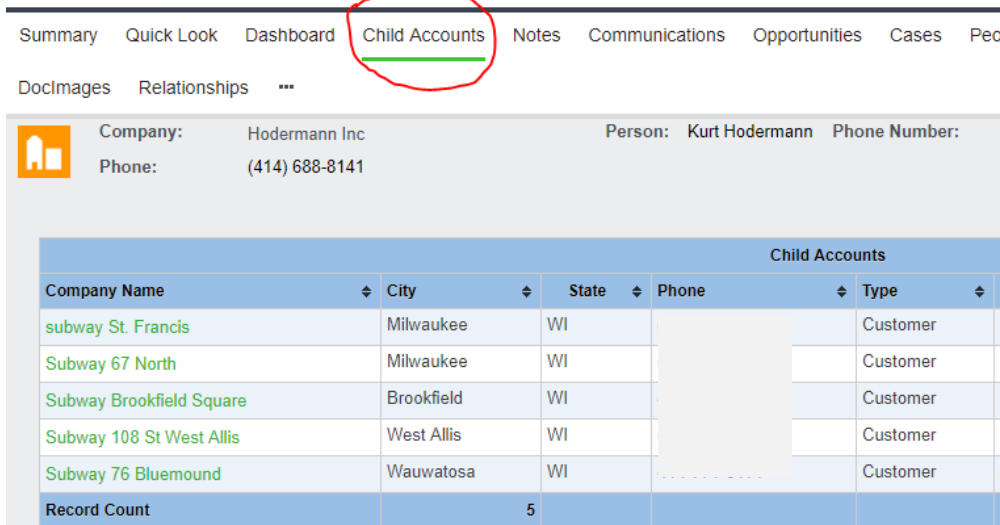
You may have companies in your CRM database that are related to each other in a Parent/Child model. They will have a Parent Company, like for example Home Depot, and then they will have company records for each location that would represent child records. It may make sense to relate the individual locations/branches to the Parent Company to make it easier to navigate between the branch (child) locations and the headquarters (parent) location.

Effective Solutions can implement custom code in your SageCRM system to allow you to designate the Parent/Child relationships on records in CRM. Here is how it works:

First we add a new field to the Company screen called Parent Company. This lets you go to each of the Child Accounts and specify who the Parent Account it. The Parent Company field is a hyperlink in CRM that lets you quickly jump to the Parent Company when you click on it. See the example below.



Then on the Parent Company record we setup a new Child Accounts ASP tab that displays all of the related Child accounts and lets you click on the Company name in the list to quickly jump to a Child account.



The price to implement this enhancement is \$600.