

# Datahug Overview

Datahug gives you a single view of all the relationships and sales activity between your organization and a prospect in Dynamics.

This doc will focus on Datahug from the Account perspective.

## Let's Get Started

Scroll down to the Datahug widget on the Account page in Dynamics.

The screenshot shows the Microsoft Dynamics CRM interface. At the top, the navigation bar includes 'Microsoft Dynamics CRM', 'SALES', 'Accounts', and 'Agility Information ...'. The user is identified as 'John Maguire' with a 'Datahug Demo' role. Below the navigation bar, there are action buttons: '+ NEW', 'DEACTIVATE', 'CONNECT', 'ADD TO MARKETING LIST', and 'ASSIGN'. The main content area shows the account 'Agility Information Megacorp' with summary statistics: Annual Revenue (\$500,000.00), No. of Employees (235), and Owner (John Maguire). The 'Datahug' widget is active, showing a filter for 'ALL CONNECTIONS (agilityinformationmegacorp.com)'. Below the filter, there are tabs for 'CONTACTS (10)', 'ANALYTICS', and 'ACTIVITY'. A search bar is present with the placeholder 'Type a name here...'. The table below lists the following contacts:

HugRank	Contact Name	Job Title	Email	Last Interaction	Connected Colleagues
	<a href="#">Joie Kish</a>	CFO	<a href="mailto:joie.kish@agilityinformationmega...">joie.kish@agilityinformationmega...</a>	19 Jan 2014	3
	<a href="#">Diamond Ewen</a>	Analyst	<a href="mailto:diamond.ewen@agilityinformatio...">diamond.ewen@agilityinformatio...</a>	21 Oct 2013	13
	<a href="#">Evelina Korth</a>	Developer	<a href="mailto:evelina.korth@agilityinformati...">evelina.korth@agilityinformati...</a>	19 Jan 2014	3
	<a href="#">Staci Loth</a>	CEO	<a href="mailto:staci.loth@agilityinformationmeg...">staci.loth@agilityinformationmeg...</a>	19 Jan 2014	3
	<a href="#">Shantell Shires</a>	Developer	<a href="mailto:shantell.shires@agilityinformation...">shantell.shires@agilityinformation...</a>	21 Oct 2013	12
	<a href="#">Natalya Odum</a>	VP Marketing	<a href="mailto:natalya.odum@agilityinformation...">natalya.odum@agilityinformation...</a>	21 Oct 2013	12
	<a href="#">Richie Trees</a>	Manager	<a href="mailto:richie.trees@agilityinformationme...">richie.trees@agilityinformationme...</a>	-	1
	<a href="#">Piper Gattison</a>	Administrator	<a href="mailto:piper.gattison@agilityinformation...">piper.gattison@agilityinformation...</a>	-	1

Datahug defaults to show you all the connections that exist between your organization and the Account. Datahug looks at the email and calendar traffic to find all of these people. It matches the people to the Account by looking at the email domain. In this case we're displaying everyone we know from Agility Information Megacorp (agilityinformationmegacorp.com).

This is a zoomed-in view of the Datahug widget. It shows the filter 'ALL CONNECTIONS (agilityinformationmegacorp.com)' and the 'CONTACTS (10)' tab selected. The table displays the following data:

HugRank	Contact Name	Job Title
	<a href="#">Joie Kish</a>	CFO
	<a href="#">Diamond Ewen</a>	Analyst
	<a href="#">Evelina Korth</a>	Developer
	<a href="#">Staci Loth</a>	CEO

Everyone is sorted by the HugRank. This is the relationship score (out of 100) between everyone at our company and the person. The stronger and higher quality the communication is with someone the higher the HugRank will be.

HugRank	Contact Name	Job Title
	<a href="#">Joie Kish</a>	CFO
HugRank: 91	<a href="#">Diamond Ewen</a>	Analyst
	<a href="#">Evangelina Korth</a>	Developer
	<a href="#">Staci Loth</a>	CEO
	<a href="#">Shantell Shires</a>	Developer
	<a href="#">Natalya Odum</a>	VP Marketing

You can hover over any of the people listed to see who the best connected colleague is.

Best Connected Colleagues	Date	HugRank
Benjamin Barnes	21 Oct 2013	<div style="width: 50%;"></div>
Stephen Anders...	21 Oct 2013	<div style="width: 50%;"></div>
Steve Turner	21 Oct 2013	<div style="width: 50%;"></div>

Some of the 10 people that we know at this Account are in Dynamics as Contacts and others are not. Anyone with the green icon does not exist.

Connected Colleagues		+
3	✓	
13	+	
3	✓	
3	✓	
12	✓	
12	✓	
1	✓	
1	✓	
1	+	
1	+	

We can go ahead and add Diamond Ewen as a Contact in Dynamics with one click.

DataHug

FILTER BY: ALL CONNECTIONS (agilityinformationmegacorp.com) CONTACTS AT ACCOUNT

CONTACTS (10) ANALYTICS ACTIVITY

HugRank	Contact Name	Job Title	Email	Last Interaction	Connected Colleagues	+
	<a href="#">Joie Kish</a>	CFO	<a href="mailto:joie.kish@agilityinformationmegacorp.com">joie.kish@agilityinformationmegacorp.com</a>	19 Jan 2014	3	✓
	<a href="#">Diamond Ewen</a>	Analyst	<a href="mailto:diamond.ewen@agilityinformationmegacorp.com">diamond.ewen@agilityinformationmegacorp.com</a>	21 Oct 2013	13	+
	<a href="#">Evangeline Korth</a>	Developer	<a href="mailto:evangelina.korth@agilityinformationmegacorp.com">evangelina.korth@agilityinformationmegacorp.com</a>	19 Jan 2014	3	✓
	<a href="#">Staci Loth</a>	CEO	<a href="mailto:staci.loth@agilityinformationmegacorp.com">staci.loth@agilityinformationmegacorp.com</a>	19 Jan 2014	3	✓
	<a href="#">Shantell Shires</a>	Developer	<a href="mailto:shantell.shires@agilityinformationmegacorp.com">shantell.shires@agilityinformationmegacorp.com</a>	21 Oct 2013	12	✓
	<a href="#">Natalya Odum</a>	VP Marketing	<a href="mailto:natalya.odum@agilityinformationmegacorp.com">natalya.odum@agilityinformationmegacorp.com</a>	21 Oct 2013	12	✓
	<a href="#">Richie Trees</a>	Manager	<a href="mailto:richie.trees@agilityinformationmegacorp.com">richie.trees@agilityinformationmegacorp.com</a>	-	1	✓
	<a href="#">Piper Gattison</a>	Administrator	<a href="mailto:piper.gattison@agilityinformationmegacorp.com">piper.gattison@agilityinformationmegacorp.com</a>	-	1	✓
	<a href="#">Vonda Dedeaux</a>	Business Development	<a href="mailto:vonda.dedeaux@agilityinformationmegacorp.com">vonda.dedeaux@agilityinformationmegacorp.com</a>	-	1	+

If you want to look at only people that exist as Contacts in Dynamics you can change the toggle to “Contacts at Account”. This will limit the view to just the Contacts that have been added to the Account. In this case there are 8 Contacts.

DataHug

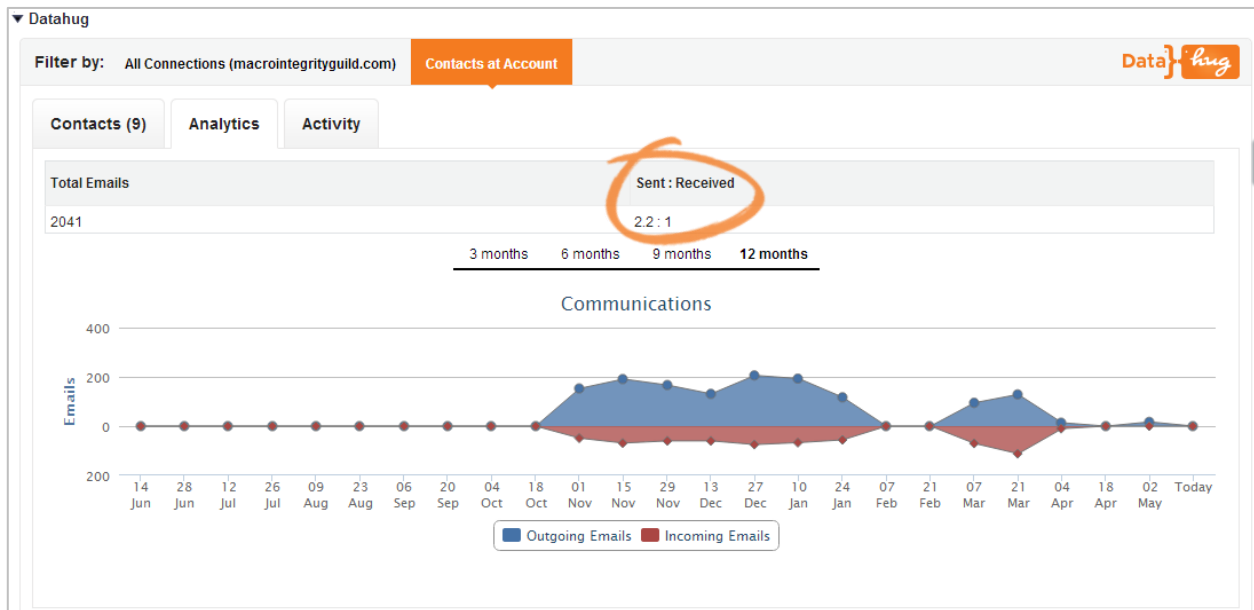
FILTER BY: ALL CONNECTIONS (agilityinformationmegacorp.com) CONTACTS AT ACCOUNT

CONTACTS (8) ANALYTICS ACTIVITY

HugRank	Contact Name	Job Title	Email	Last Interaction	Connected Colleagues
	<a href="#">Joie Kish</a>	CFO	<a href="mailto:joie.kish@agilityinformationmegacorp.com">joie.kish@agilityinformationmegacorp.com</a>	19 Jan 2014	3
	<a href="#">Diamond Ewen</a>	Analyst	<a href="mailto:diamond.ewen@agilityinformationmegacorp.com">diamond.ewen@agilityinformationmegacorp.com</a>	21 Oct 2013	13
	<a href="#">Evangeline Korth</a>	Developer	<a href="mailto:evangelina.korth@agilityinformationmegacorp.com">evangelina.korth@agilityinformationmegacorp.com</a>	19 Jan 2014	3
	<a href="#">Staci Loth</a>	CEO	<a href="mailto:staci.loth@agilityinformationmegacorp.com">staci.loth@agilityinformationmegacorp.com</a>	19 Jan 2014	3
	<a href="#">Natalya Odum</a>	VP Marketing	<a href="mailto:natalya.odum@agilityinformationmegacorp.com">natalya.odum@agilityinformationmegacorp.com</a>	21 Oct 2013	12
	<a href="#">Shantell Shires</a>	Developer	<a href="mailto:shantell.shires@agilityinformationmegacorp.com">shantell.shires@agilityinformationmegacorp.com</a>	21 Oct 2013	12
	<a href="#">Piper Gattison</a>	Administrator	<a href="mailto:piper.gattison@agilityinformationmegacorp.com">piper.gattison@agilityinformationmegacorp.com</a>	-	1
	<a href="#">Richie Trees</a>	Manager	<a href="mailto:richie.trees@agilityinformationmegacorp.com">richie.trees@agilityinformationmegacorp.com</a>	-	1

## Analytics

The Datahug Analytics tab shows the pulse of communication between us and the Account. This is very useful to visualize the email activity and instantly see if you are properly engaged with the Account or not.



Blue is the emails that have been sent and red is the emails received. You can also see the total number of emails and the Sent : Received ratio which shows the quality of the communication.

Note that the data displayed is contextual to the toggle option so if you have selected “Contacts at Account” you will see the pulse between you and Contacts in Dynamics at the Account. If you switch to “All at xyz.com” you will see the pulse between everyone at the organization and you.

## Activity




The DataHug Activity tab gives you a complete overview of the activity between you and the Account. You can see all the email traffic and any past or upcoming meetings.

Date	Time	Contact 1	Contact 2
11 Sep 2014	15:53	Ruby Butler	Ruby Butler, Allyn Littlepage, Josphine Hayden, Steffanie Buse
26 Aug 2014	17:53	Ruby Butler	Ruby Butler, Allyn Littlepage, Josphine Hayden, Steffanie Buse
19 Apr 2014	23:00	John Maguire	Josphine Hayden, Johnette Mitzel
19 Apr 2014	23:00	Ruby Butler	Josphine Hayden, Johnette Mitzel
19 Apr 2014	22:00	Ruby Butler	Josphine Hayden
19 Apr 2014	21:00	Josphine Hayden	Ruby Butler, Johnette Mitzel
19 Apr 2014	21:00	John Maguire	Josphine Hayden
19 Apr 2014	21:00	Ruby Butler	Josphine Hayden
19 Apr 2014	21:00	Ruby Butler	Josphine Hayden
19 Apr 2014	21:00	Ruby Butler	Josphine Hayden, Johnette Mitzel, Ruth Sellman

You can filter for just the emails or meetings using the checkboxes to show the different items.

Date	Time	Contact 1	Contact 2
19 Apr 2014	23:00	John Maguire	Josphine Hayden
19 Apr 2014	23:00	Ruby Butler	Josphine Hayden
19 Apr 2014	22:00	Ruby Butler	Josphine Hayden
19 Apr 2014	21:00	Josphine Hayden	Ruby Butler
19 Apr 2014	21:00	John Maguire	Josphine Hayden
19 Apr 2014	21:00	Ruby Butler	Josphine Hayden
19 Apr 2014	21:00	Ruby Butler	Josphine Hayden

## Icon Key

	Add person outside of Dynamics as a Contact to the Account
	This person is a Contact in Dynamics and is on the Account
	This person is a Contact on another Account or the person exists as a Lead in Dynamics. Hover over and the tool-tip will tell you the exact details