



SugarU Live Webinar Series: Dashboard Mastery: Setting Up Powerful Insights in SugarCRM

Turn Data into Decisions

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June 2025

Welcome & Housekeeping

- Introduction
- Agenda overview
- Webinar logistics:
 - Chat
 - Recording





What's your experience level with Sugar's dashboards?

Why Dashboards Matter



Empower data-driven decisions



Improve sales, support,
marketing



Boost visibility and performance

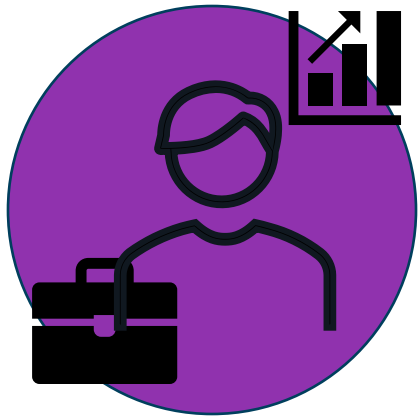
Types of Users & Dashboards



Sales Rep
Lead tracking



Support Agent
SLA tracking



Sales Manager Team
performance



Executive
High-level KPIs

Dashlets

Anatomy of a Dashboard

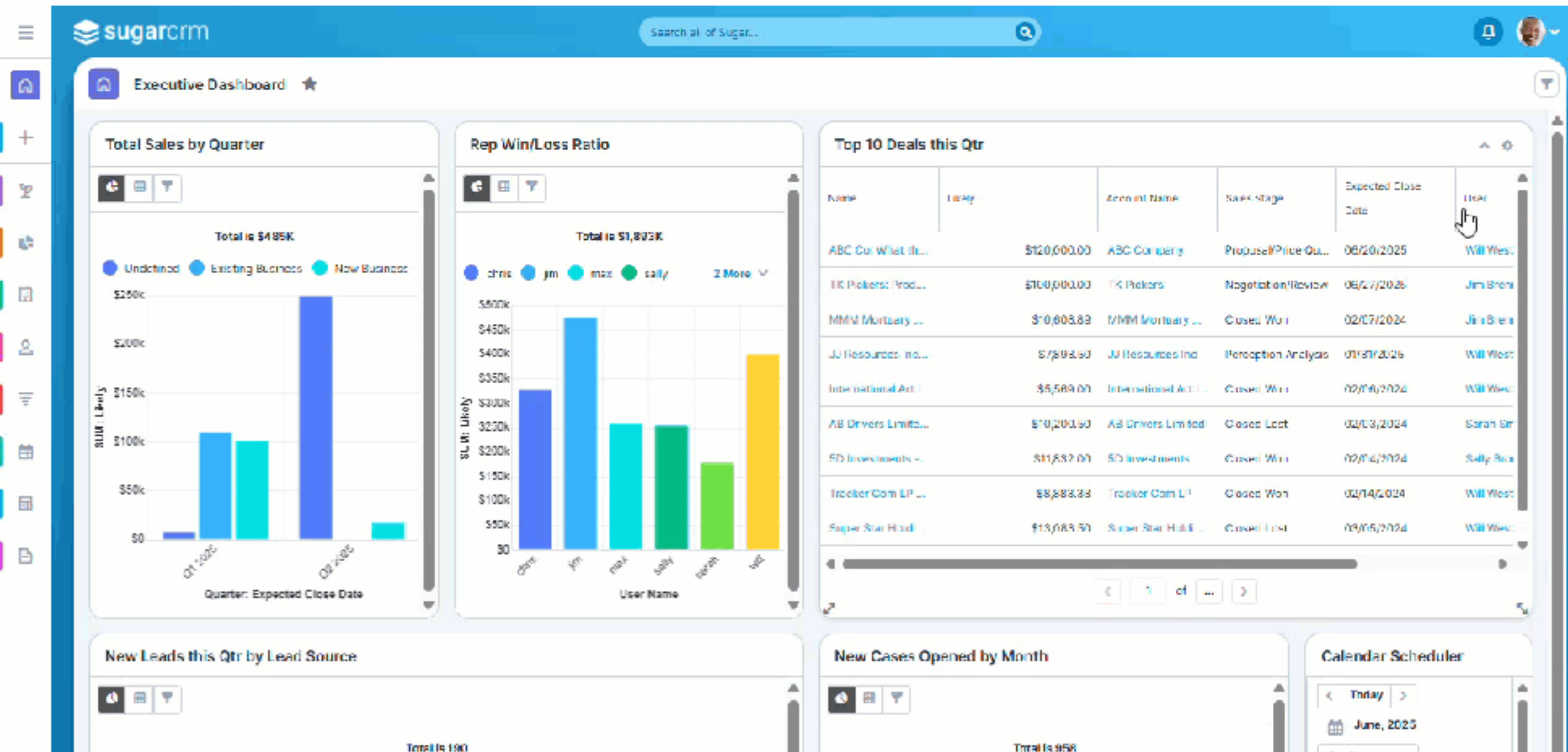
The screenshot displays the SugarCRM Executive Dashboard with several dashlets. The top navigation bar includes the SugarCRM logo, a search bar, and user profile icons. The dashboard is titled "Executive Dashboard" and contains the following dashlets:

- Total Sales by Quarter:** A bar chart showing sales for Q1 2025 and Q2 2025. The total sales are \$485K. The chart is categorized into Undefined, Existing Business, and New Business.
- Rep Win/Loss Ratio:** A bar chart showing the win/loss ratio for sales reps: chris, jim, max, sally, sarah, and will. The total is \$1,893K.
- Top 10 Deals this Qtr:** A table listing the top 10 deals, including details like Name, Likely amount, Account Name, Sales Stage, Expected Close Date, and User.
- New Leads this Qtr by Lead Source:** A partially visible dashlet at the bottom left.

Name	Likely	Account Name	Sales Stage	Expected Close Date	User
ABC Co: What th...	\$120,000.00	ABC Company	Proposal/Price Qu...	06/20/2025	Will West
TK Pickers: Prod...	\$100,000.00	TK Pickers	Negotiation/Review	06/27/2025	Jim Breni
MMM Mortuary ...	\$10,608.89	MMM Mortuary ...	Closed Won	02/07/2024	Jim Breni
JJ Resources Inc...	\$7,893.50	JJ Resources Inc	Perception Analysis	01/31/2025	Will West
International Art I...	\$5,569.00	International Art I...	Closed Won	02/06/2024	Will West
AB Drivers Limite...	\$10,200.50	AB Drivers Limited	Closed Lost	02/03/2024	Sarah Sr
5D Investments - ...	\$11,832.00	5D Investments	Closed Won	02/04/2024	Sally Broi
Tracker Com LP ...	\$8,883.33	Tracker Com LP	Closed Won	02/14/2024	Will West
Super Star Holdi...	\$13,083.50	Super Star Holdi...	Closed Lost	03/05/2024	Will West

Anatomy of a Dashboard

Filters



Anatomy of a Dashboard

Focus Drawers

The screenshot shows the SugarCRM Executive Dashboard with a Focus Drawer open on the right side. The dashboard contains several widgets:

- Total Sales by Quarter:** A bar chart showing sales for Q1 2025 and Q2 2025. Total is \$485K.
- Rep Win/Loss Ratio:** A bar chart showing the ratio for user 'jim'. Total is \$476K.
- Top 10 Deals this Qtr:** A table listing deals with columns: Name, Likely, Account Name, Sales Stage, and Expected Cl Date.
- New Leads this Qtr by Lead Source:** A widget showing lead sources with a total of 190.
- New Cases Opened by Month:** A widget showing cases with a total of 958.
- Calendar Sched:** A calendar view for June 2025.

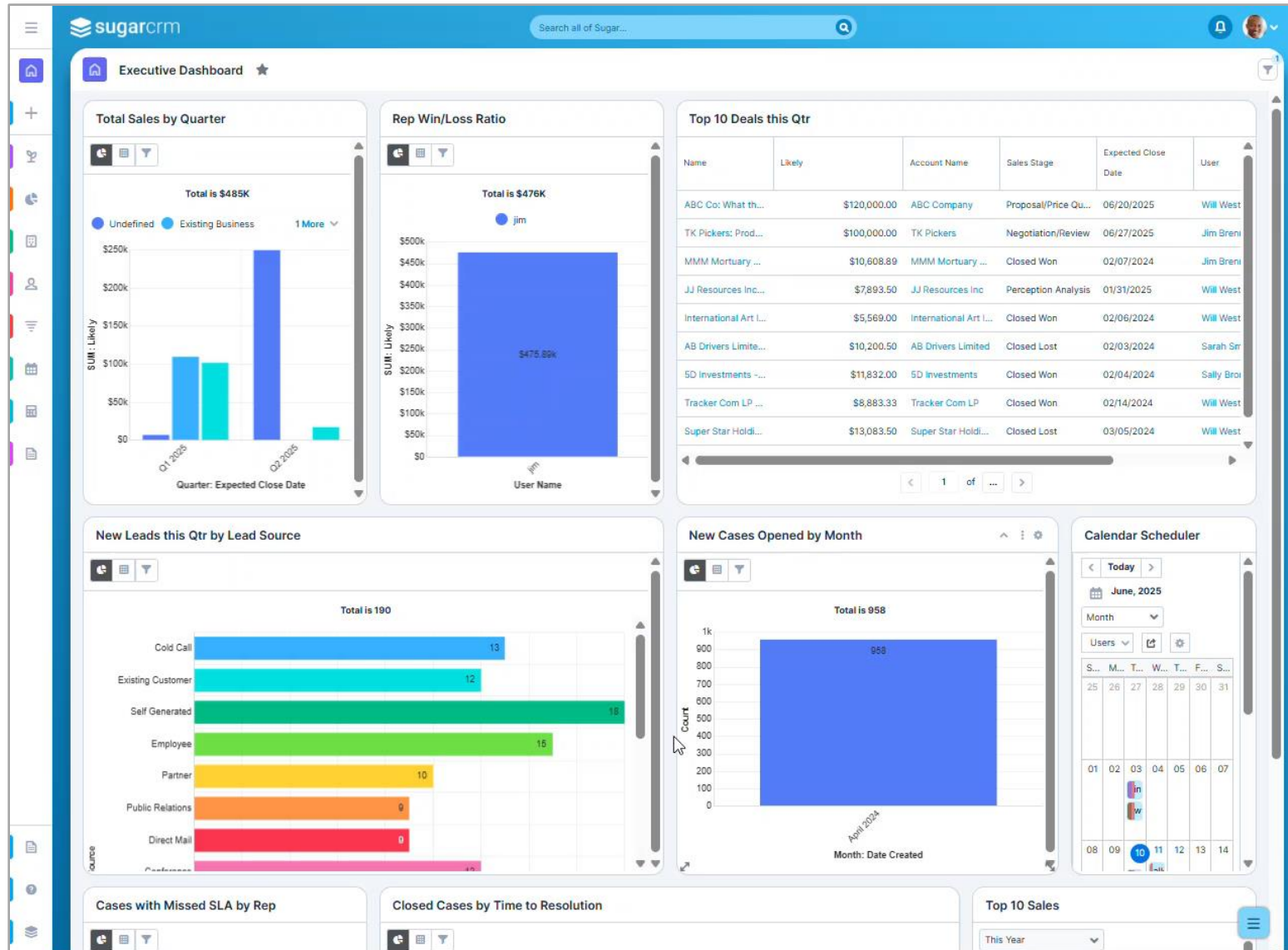
The Focus Drawer on the right is titled "Dashboard Filters" and contains:

- An "Apply" button.
- A "New Filter (1)" section with the filter "Is One Of Current User".
- A dropdown menu set to "Is One Of".
- A "Select All" button.
- A list of users with checkboxes: Jen Smith, Demo Builder, Adam Frank, and Alena Zidek.

Name	Likely	Account Name	Sales Stage	Expected Cl Date
ABC Co: What th...	\$120,000.00	ABC Company	Proposal/Price Qu...	06/20/2025
TK Pickers: Prod...	\$100,000.00	TK Pickers	Negotiation/Review	06/27/2025
MMM Mortuary ...	\$10,608.89	MMM Mortuary ...	Closed Won	02/07/2024
JJ Resources Inc...	\$7,893.50	JJ Resources Inc	Perception Analysis	01/31/2025
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Anatomy of a Dashboard

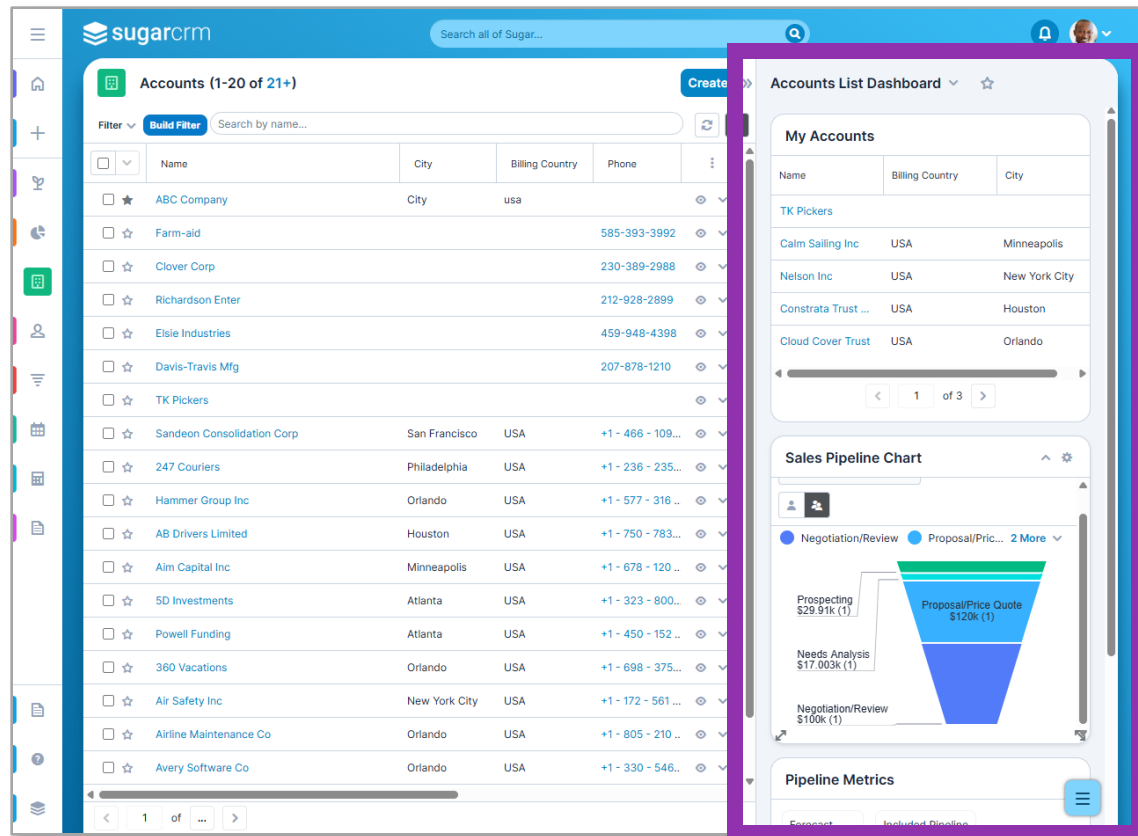
Layout



Anatomy of a Dashboard

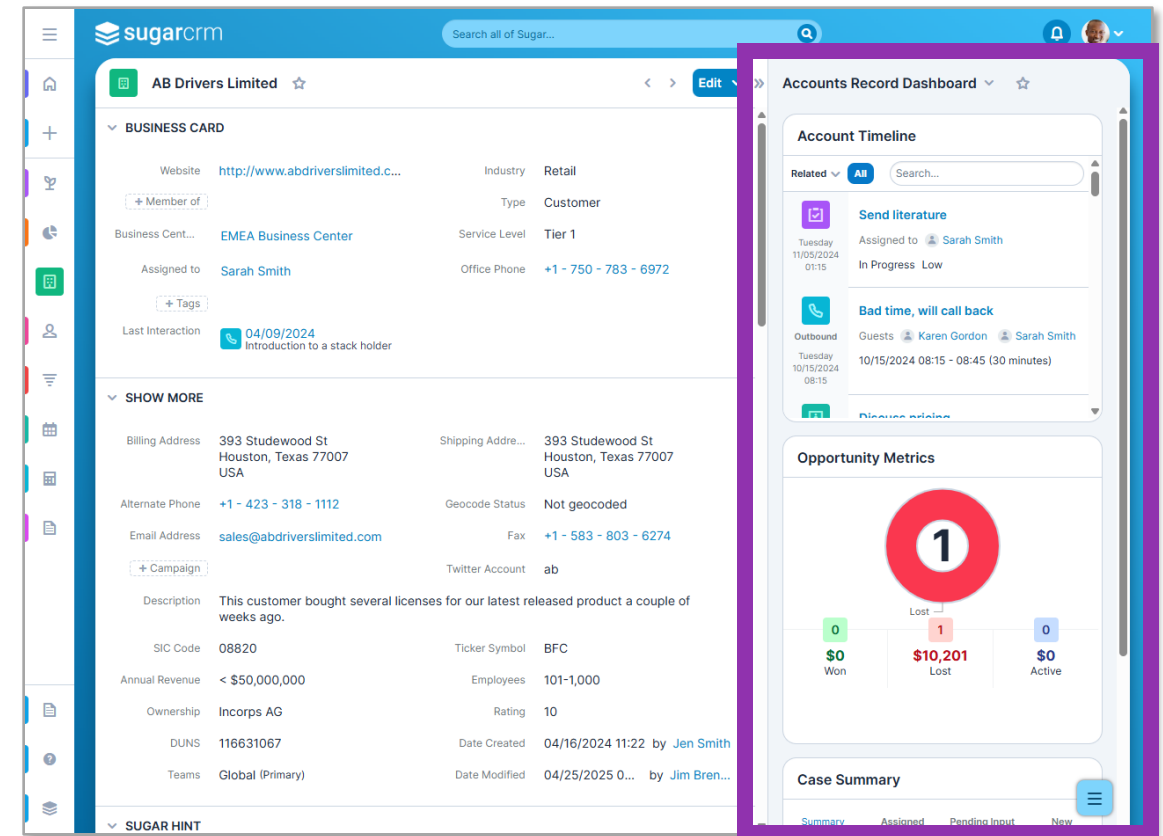
Layout

Intelligence Pane on List View



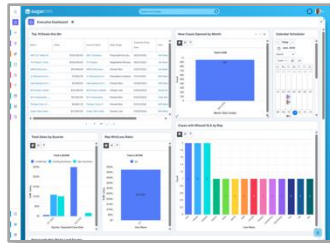
The screenshot shows the SugarCRM interface for the 'Accounts' list view. The main area displays a table of accounts with columns for Name, City, Billing Country, and Phone. A search bar and filter options are at the top. On the right, the 'Intelligence Pane' is highlighted with a purple border. It contains three sections: 'My Accounts' (a table of account details), 'Sales Pipeline Chart' (a funnel chart showing stages like Prospecting, Needs Analysis, and Negotiation/Review), and 'Pipeline Metrics' (a summary of pipeline statistics).

Intelligence pane on the Record View



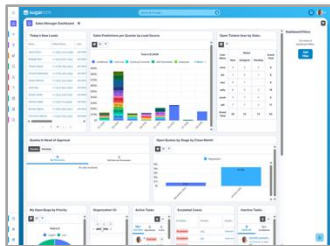
The screenshot shows the SugarCRM interface for the 'AB Drivers Limited' record view. The main area displays a 'BUSINESS CARD' with fields for Website, Industry, Type, Service Level, Office Phone, and Last Interaction. On the right, the 'Intelligence Pane' is highlighted with a purple border. It contains three sections: 'Account Timeline' (a list of recent activities like 'Send literature' and 'Bad time, will call back'), 'Opportunity Metrics' (a large red circle with the number '1' and a bar chart showing 'Won', 'Lost', and 'Active' metrics), and 'Case Summary' (a summary of the account's case history).

Anatomy of a Dashboard



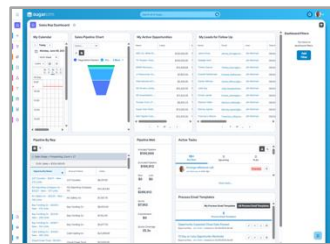
Executive Dashboard

A glimpse of how their entire business is functioning, from sales and win/loss ratio to the trends in time-to-resolution for cases



Sales Manager Dashboard

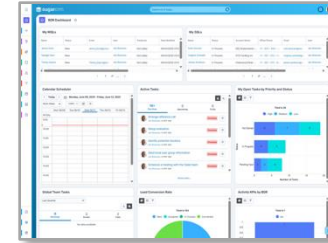
A big-picture view of newly created leads and pipeline, as well as quotes needing approval and escalated cases



Sales Rep Dashboard

Presented leads, open opportunities, and pipeline to sales reps so they can quickly understand the state of their work and how to focus their efforts each day

Templates



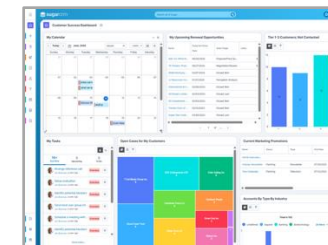
BDR Dashboard

(Business Development Rep)
Tracks marketing and sales qualified leads, lead sources, and lead conversation rates.



Marketing Dashboard

Gives users a sense of new leads coming into the CRM, where they are coming from, and how marketing campaigns are working.



Customer Success Dashboard

Provides insight into customers from sales to an account's open case.

Building a Dashboard

Step-by-Step

1. Define the purpose

2. Choose modules and reports

3. Plan layout

4. Add and configure dashlets

5. Test and refine

6. Share with teams

Example

1. Dashboard for My To-do Items for the Day

2. Opportunities in Pipeline, My Favorite Accounts, New and Assigned Leads, Planned Activities, and Active Tasks.

3. Three Columns with the Activities at the top

4. Dashlets: Reports Dashlet, List View, Planned Activities, and Active Tasks

5. Use and Test how it works

6. Share Dashboard with my team in Dashboard Management

Live Demo: Creating and Sharing Dashboards

Advanced Customization Tips – Navigating Dashboards in the Mobile App

The screenshot displays the SugarCRM mobile app interface. At the top, there is a blue header with the SugarCRM logo, a search bar, and a user profile icon. Below the header, the main dashboard is titled "Home Dashboard" and features three primary sections:

- My Contacts:** A table listing contact information for five individuals.
- Pipeline:** A funnel chart for "2025 Q2" showing the progression of sales opportunities through four stages: Value Proposition, Needs Analysis, Qualification, and Prospecting.
- Top 10 Sales Opportunities:** A bubble chart for "This Quarter" showing the progress of various sales opportunities.

Name	Account Name	Office Phone
Christopher Hud...	X-Sell Holdings	+1 - 732 - 105 -
Stephanie Henry	X-Sell Holdings	+1 - 879 - 823 -
Susan Holmes	X-Sell Holdings	+1 - 751 - 120 -
Jessica Hunt	South Sea Plumb...	+1 - 685 - 563 -
Kimberly Gordon	South Sea Plumb...	+1 - 443 - 291 -

Pipeline Data:

Stage	Value	Count
Prospecting	\$29.91k	1
Needs Analysis	\$29.397k	2
Value Proposition	\$45k	4
Qualification	\$20.371k	2

Top 10 Sales Opportunities:

Chris Olliver

Advanced Customization Tips – Processes Dashlet

The screenshot displays the SugarCRM Home Dashboard with a focus on the Processes Dashlet. The dashboard includes a navigation sidebar, a search bar, and several data-rich widgets.

My Contacts

Name	Account Name	Office Phone
Don James	TK Pickers	
Catherine Stanley	White Cross Co	+1 - 138 - 123
Jacob Banks	White Cross Co	+1 - 691 - 644
Patricia Castillo	White Cross Co	+1 - 693 - 926
Joseph Andrews	White Cross Co	+1 - 172 - 195

Processes

Current Overdue

2 My Processes 0 Self Service Processes

Pipeline

2025 Q2

Negotiation/Review

Negotiation/Review \$100k (1)

Top 10 Sales Opportunities

This Quarter

80%

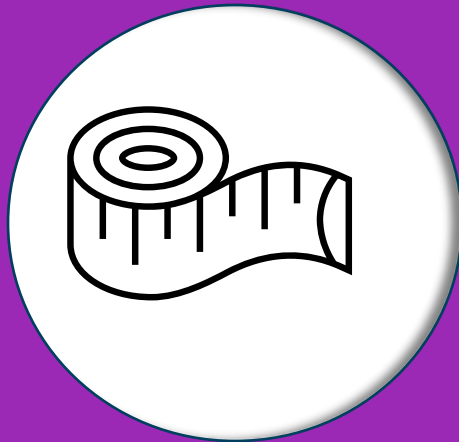
Advanced Customization Tips – Group by...

- KPIs,
- Time periods, or
- Pipelines

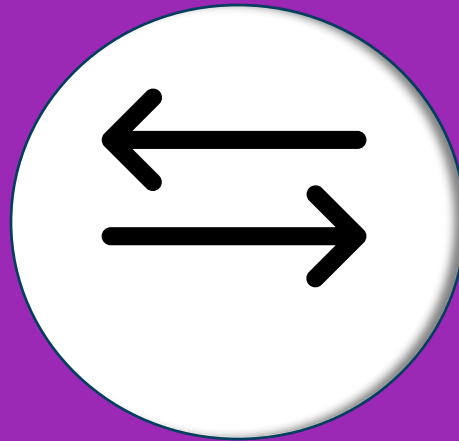
Common Mistakes to Avoid



Info Overload



**One-size-fits-all
dashboards**



**Misalignment
with KPIs**



Poor layout

Resources

- [Sugar Dashboard & Dashlet Documentation](#)
- [SugarCRM Help Article](#)
- [SugarClub Community – Ask Questions](#)

Recap Key Points

Why are Dashboards Matter

Types of Users and Dashboards

Anatomy of a Dashboard

Building a Dashboard

Advanced Customization Tips

Common Mistakes to Avoid

Dashboard Examples

Dashboard Resources

Call to Action

1. Start your dashboard journey today
2. Explore our Sugar Application Guide
3. Share your dashboard Success Story on SugarClub



Questions & Answers





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THANKS FOR ATTENDING

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