

Why Your Sugar Reports Don't Look Right

- Use this checklist before escalating a scheduled report issue to Support
- Validate — don't assume

Start with the business question

What do I want to measure?



Which records should be included?



Which records should be excluded?



What time period am I analyzing?



Am I looking for detail, summary, or comparison?

Date & Filter Checks

Am I using the correct date field?

Fixed vs relative date—did I choose correctly?

Could time zones affect this result?

Are relative filters recalculating?

Am I expecting a filter that doesn't exist?

Relationship Checks

Am I filtering on a related module?

Could a child record be driving this result?

Is a parent record appearing because of related data?

Structure & Totals Checks

What report type am I using?

Is grouping affecting totals?

Could one-to-many relationships increase row count?

Are values being counted multiple times?

Validation Steps

- Build a simple Rows and Columns report first
- Add date fields to confirm results
- Remove grouping to inspect raw data
- Simplify filters and test step-by-step
- Compare reports with an identical structure

Keep the goal in mind

The goal is not only to build a report that runs. The goal is to build a report that is:

- understandable
- repeatable
- reliable
- easy to explain
- trusted by the people using it



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