



Sugar Sell Foundations Webinar Series: Week 8

From Data to Direction: Mastering Reports in Sugar

Webinar Handout

1 Report Builder Checklist

Use this checklist anytime you build a report in Sugar.

- ☐ Clearly defined the business question
- ☐ Identified the correct module
- ☐ Selected the right report type
- ☐ Applied filters to answer who / what / when
- ☐ Grouped data to reveal patterns
- ☐ Added summaries to highlight trends
- ☐ Chose table vs chart intentionally
- ☐ Saved, scheduled, and shared the report

Tip: If a report feels confusing, revisit the first three steps.

2 Fill-in-the-Blanks (Guided Notes)

Start With the Question: “I am building this report to understand _____.”

Audience: “This report is primarily for _____.”

Decision Supported: “This report will help someone decide _____.”

3 Key Reporting Principles

- Start simple — complexity can come later
- Match the report type to the goal
- Filters define *what’s included*
- Grouping shows *patterns*
- Summaries reveal *trends*
- Charts clarify stories, not details
- Advanced reports are powerful, but not always necessary

4 Supplementary Resources & Deep Dives - Where to Learn More

[Application Guide>Reports](#)

[Sugar Discovery Guide](#) (Enhanced Forecasting)

[Advanced Reports](#)

Help Article> [Identifying User Roles via Advanced Reports](#)

Sugar Club:

[A simple custom Query like a for quick summary. Great for use in Advanced Reports](#)

Exploring [Enhanced Forecasting](#) video



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[Standard vs. Enhanced Forecasting in Sugar Sell & Sugar Enterprise](#) post
[Sugar Discover: How to Replace a Field](#) video
[Sugar Discover: How to Find a Hidden Field](#) video
[Sugar Discover: How to Create a New Custom Report](#) video
[Sugar Discover: How to Change a Calculated Field Definition](#) video

Recommended Next Step:

Rebuild one report you already use today using the principles from this webinar.

5 Answer True or False:

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1. ☐ ☐ Rows & Columns reports are best for detailed lists
2. ☐ ☐ Charts are always better than tables
3. ☐ ☐ Filters decide which records appear in a report
4. ☐ ☐ Advanced Reports should be the first option for most reporting needs
5. ☐ ☐ Scheduled reports help drive ongoing visibility

Reflection Question:

“One reporting habit I want to change after this webinar is _____.”

6 Clear Call to Action - Your Next Steps

Within the next 7 days:

1. Choose one report you currently use
2. Rebuild it using today’s framework
3. Apply at least one improvement:
 - clearer filters
 - better grouping
 - or a more effective visualization

Write it down:

“The report I will rebuild first is _____.”