From Data to Direction: Mastering Reports in Sugar

Sugar Sell Foundations Webinar Series

February 2026

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Housekeeping & What to Expect

- Session timing and Q&A
- Recording and slides
- How to submit questions

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Why Reporting Feel Hard?

- Too much data, not enough clarity
- Not sure which report type to use
- Reports don’t always get used or shared

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Poll Question

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What You'll Learn Today

- Build reports step-by-step
- Choose the right report type
- Group, filter, and summarize data
- Use forecasting & advanced reports
- Save, schedule, and share

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Choose the Right Landscape in Sugar

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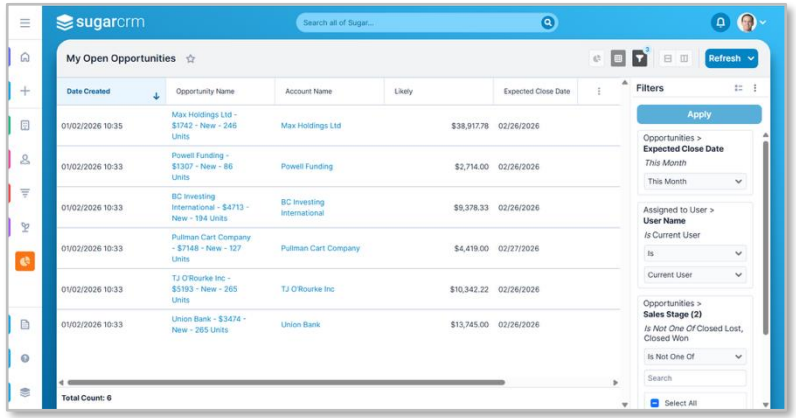
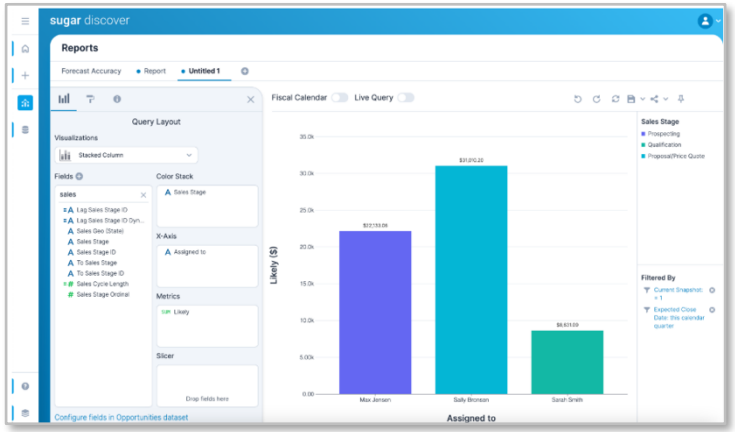
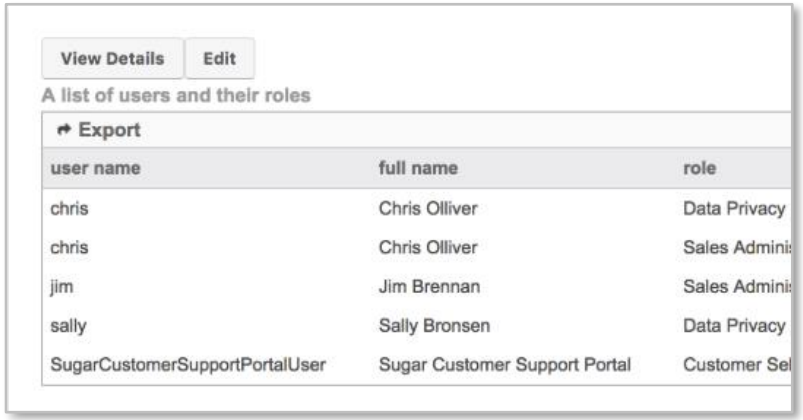
The Reporting Landscape in Sugar



Standard Reports



Enhanced Forecasting Reports



Advanced Reports

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Build Reports Step-by-Step

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Questions You Should Ask Yourself When Creating a Report

1. **Why** am I building this report?

   Example: “I am building this report to understand which opportunities are most likely to close this quarter.”

   Reports start with a *business question*, not a feature.

2. **Who** is my Audience for this report?

   Example: “This report is primarily for my sales reps managing their own pipeline.”

   Audience determines report type, level of detail, and visualization.

3. **What** decision does this report support?

   Example: “This report will help someone decide which deals need attention this week.”

   If a report doesn’t support a decision, it’s just data.

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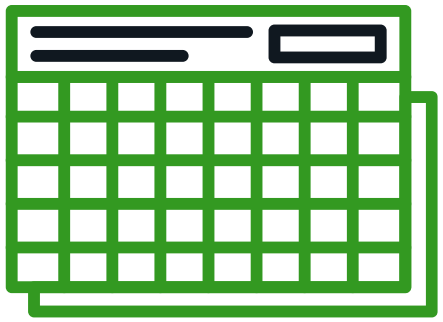
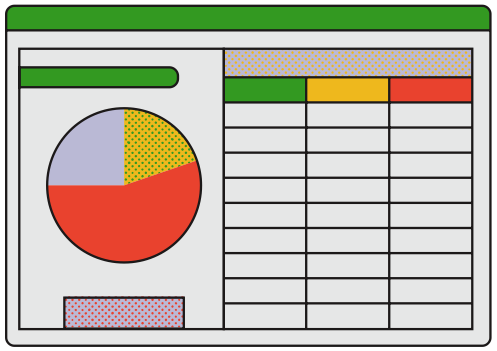
Choosing the Right Standard Report Type

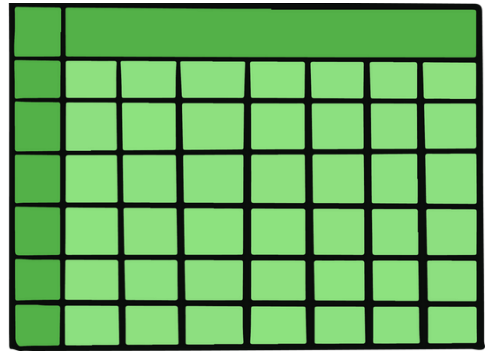


Rows & Columns

Summation



Summation with Details



Matrix

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Demo: Build a Report from Scratch

Build
step-by-step

Focus on clarity,
not complexity

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Making Data Meaningful

Filters answer who/what/when

Grouping shows patterns

Summaries highlight trends

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Group, Filter & Summary Data

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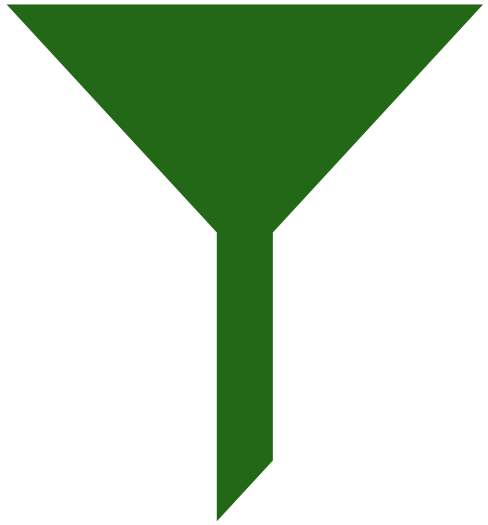
Visualizing Reports with Charts



Filter who/what/when

Grouping shows patterns

Summaries highlight trends

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Save, Schedule & Share

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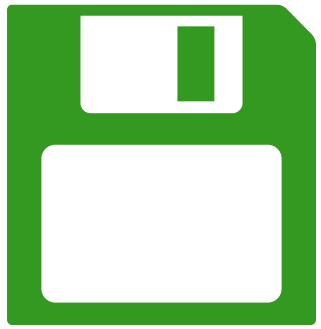
Saving, Scheduling & Sharing Reports



Save for reuse

Schedule delivery

Share with teams

Use Enhanced Forecasting & Advanced Reports

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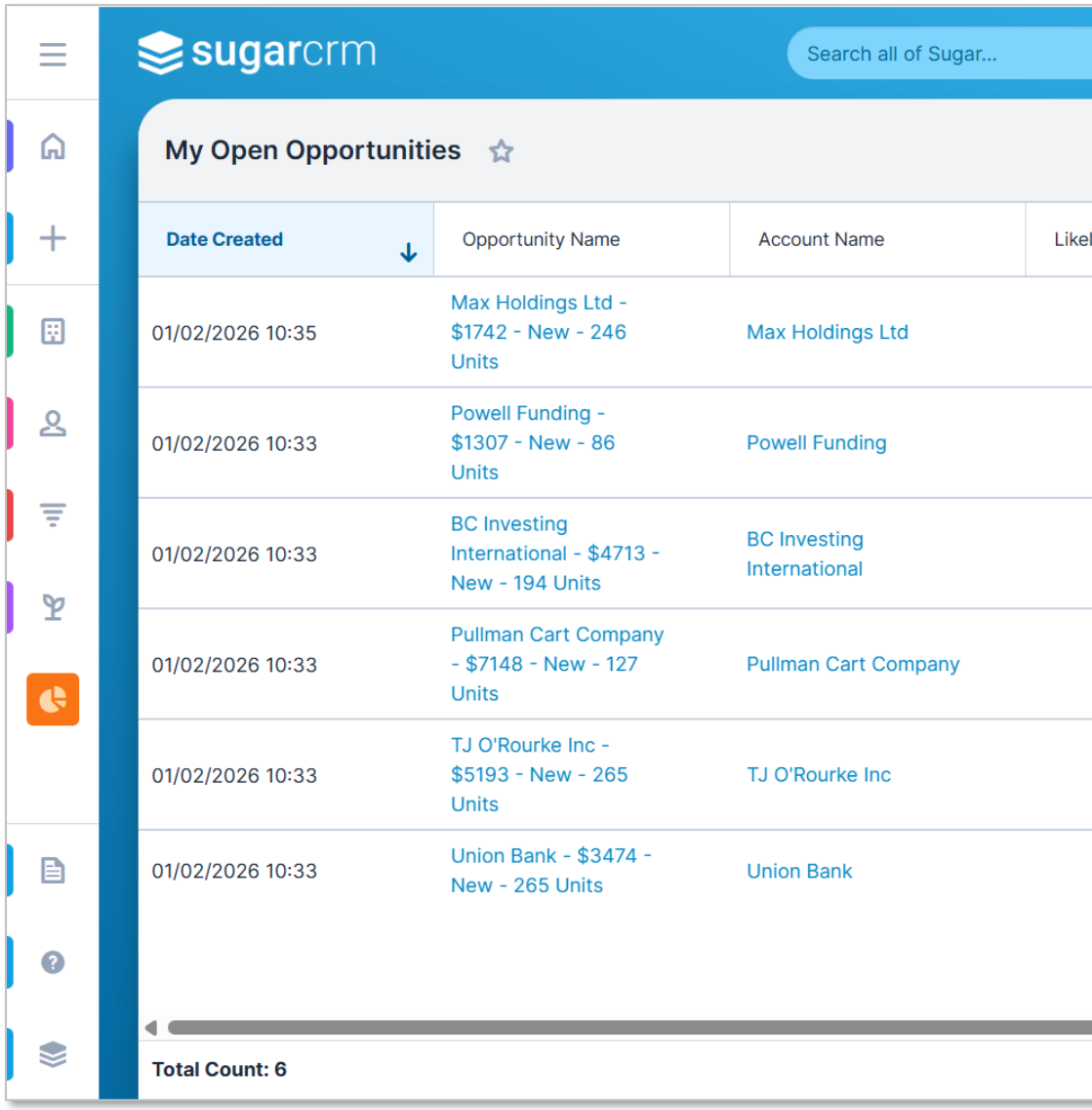
When Standard Reports Aren’t Enough

- Historical Reporting
- Complex joins
- Audit-style reporting
- Highly custom logic



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```
SELECT u.user_name 'User Name'
,CONCAT(IsNULL(u.first_name,''),' ',IsNULL(u.last_name,'')) 'Full Name'
,u.title 'Title'
,u.department 'Department'
,r.name 'Role'

FROM users u
JOIN acl_roles_users ur on ur.user_id = u.ID
JOIN acl_roles r on r.id = ur.role_id

WHERE r.deleted=0
AND ur.deleted = 0
AND u.deleted=0
ORDER BY u.user_name
```

Advanced Reports Overview

- SQL-based custom reports
- Built from:
  - Custom Queries
  - Data Formats
  - Advanced Report records

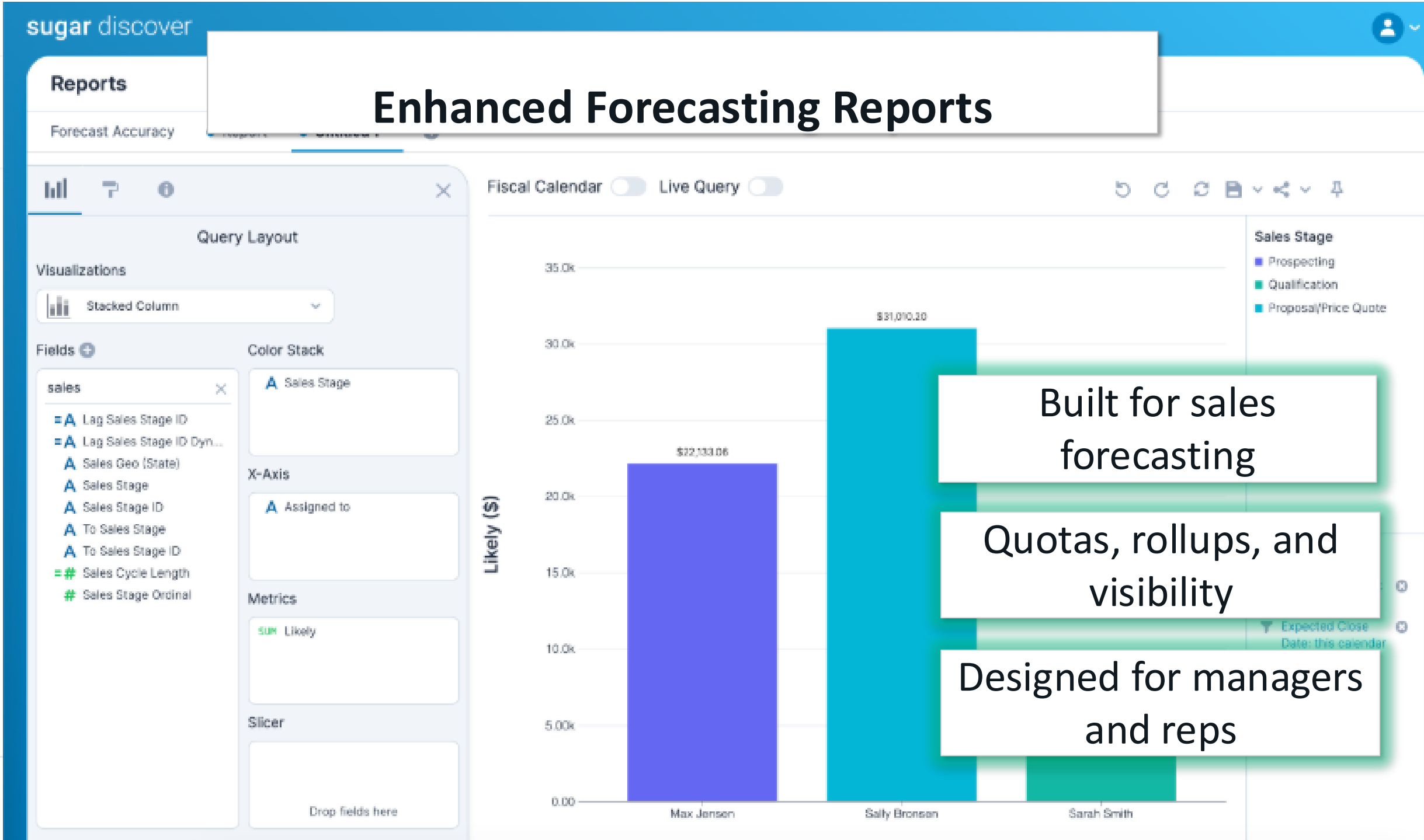
View Details | Edit

A list of users and their roles

Export

user name	full name	role	title	department
chris	Chris Olliver	Data Privacy Manager	Senior Account Rep	
chris	Chris Olliver	Sales Administrator	Senior Account Rep	
jim	Jim Brennan	Sales Administrator	VP Sales	
sally	Sally Bronsen	Data Privacy Manager	Senior Account Rep	
SugarCustomerSupportPortalUser	Sugar Customer Support Portal	Customer Self-Service Portal Role	Sugar Customer Support Portal User	

Enhanced Forecasting Reports



Q&A and Next Steps

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Key Takeaways

- Start simple
- Match report type to goal
- Visualize when it helps
- Use advanced tools when needed

Additional Resources

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
- 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

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Admin Fundamentals Class

February 17-19 from 10 am 1 pm CDT

Use code **AdminFun50** for 50% off!

You'll learn how to:

- Get Started as a Sugar Administrator
- Implement Users, Teams, Roles, and Team-based Permissions
- Perform basic configurations using Studio
- Create new modules
- Import and Export your data
- Configure Outbound Email
- Configure Forecasting
- Troubleshoot issues and work with Sugar Support

Questions?

Afterward this Webinar

- Start Simple with Reports
- If you have Sell Premier, try using Enhanced Forecasting.
- If you know how to use SQL Queries, check out Advanced Reports.
- Watch any previous webinars in this series.p

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sugarU | Unlock sales potential

Thank you for attending.

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