



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



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

Poll Question



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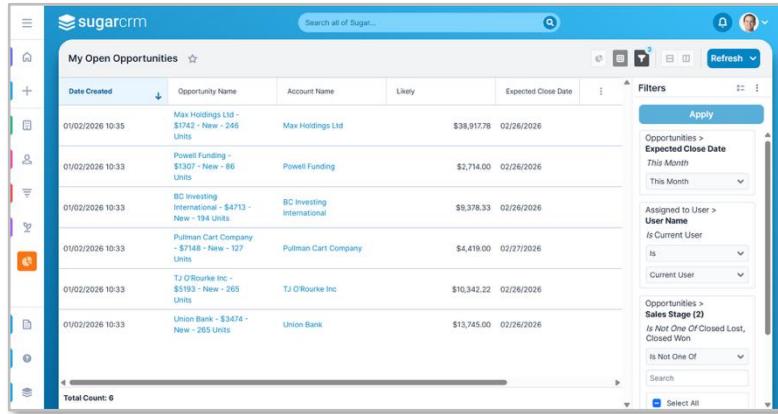


What You'll Learn Today

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

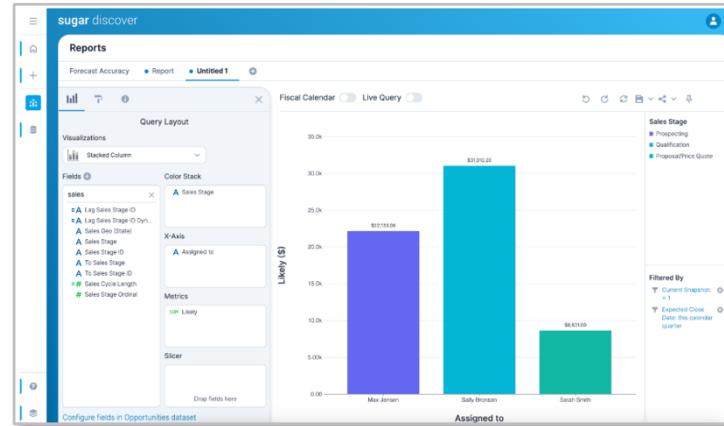
Choose the Right Landscape in Sugar

The Reporting Landscape in Sugar

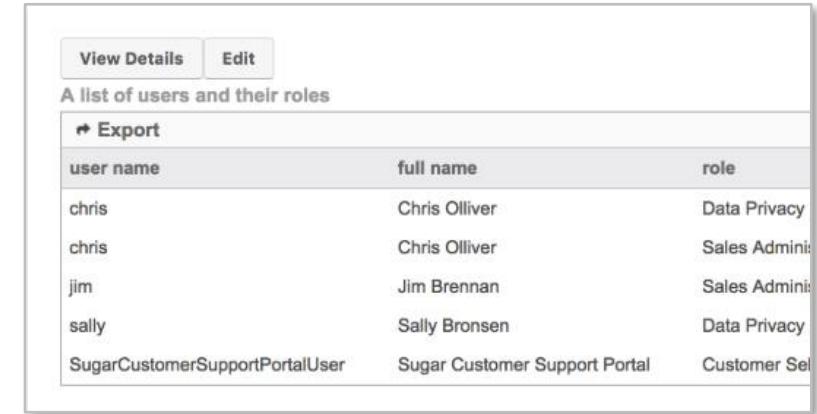


This screenshot shows the SugarCRM standard reports interface. It displays a list of 'My Open Opportunities' with columns for Date Created, Opportunity Name, Account Name, Likely, and Expected Close Date. A sidebar on the left shows a navigation menu with icons for Home, Accounts, Leads, Opportunities, and more. A 'Filters' sidebar on the right is open, showing filters for 'Opportunities > Expected Close Date' (set to 'This Month') and 'Assigned to User > User Name' (set to 'Is Current User'). The total count of opportunities is 6.

Standard Reports



Enhanced Forecasting Reports



This screenshot shows the SugarCRM advanced reports interface. It displays a table titled 'A list of users and their roles' with columns for 'user name', 'full name', and 'role'. The table includes rows for chris (Chris Olliver, Sales Admin), jim (Jim Brennan, Sales Admin), sally (Sally Bronsen, Data Privacy), and SugarCustomerSupportPortalUser (Sugar Customer Support Portal, Customer Sel). A 'View Details' and 'Edit' button are at the top of the table. A 'Export' button is also present.

	View Details	Edit
A list of users and their roles		
user name	full name	role
chris	Chris Olliver	Data Privacy
chris	Chris Olliver	Sales Admin
jim	Jim Brennan	Sales Admin
sally	Sally Bronsen	Data Privacy
SugarCustomerSupportPortalUser	Sugar Customer Support Portal	Customer Sel

Advanced Reports

Build Reports Step-by-Step



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."

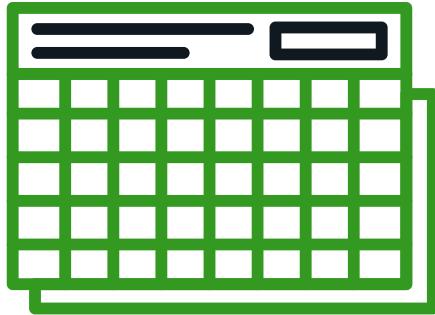
Audience determines report type, level of detail, and visualization.

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

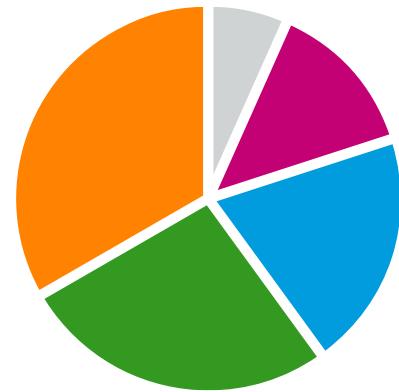
Example: "This report will help someone decide which deals need attention this week."

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

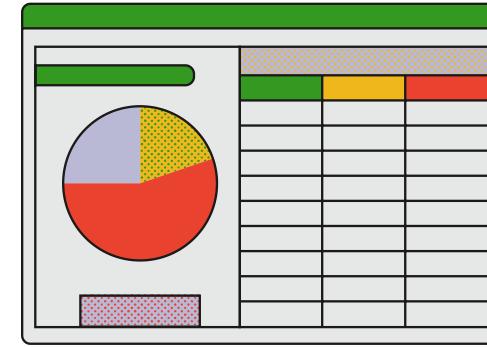
Choosing the Right Standard Report Type



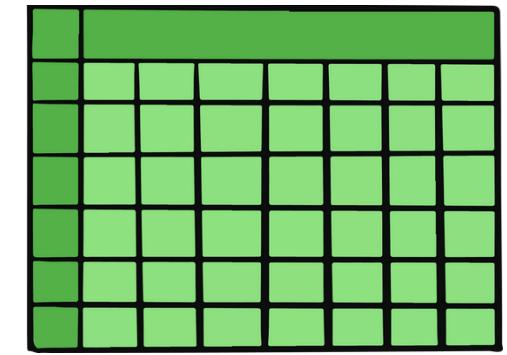
Rows & Columns



Summation



Summation with
Details



Matrix

Poll Question



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Demo: Build a Report from Scratch

Build
step-by-step

Focus on clarity,
not complexity

Poll Question



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Making Data Meaningful



Filters answer
who/what/when



Grouping shows
patterns



Summaries highlight
trends

Poll Question

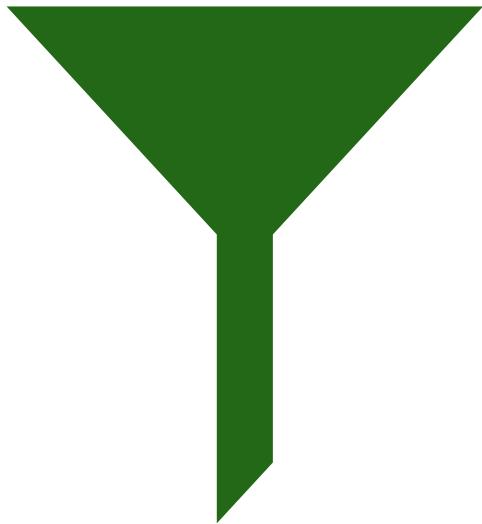


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Group, Filter & Summary Data

Visualizing Reports with Charts



Filter who/what/when



Grouping shows patterns



**Summaries highlight
trends**

Poll Question

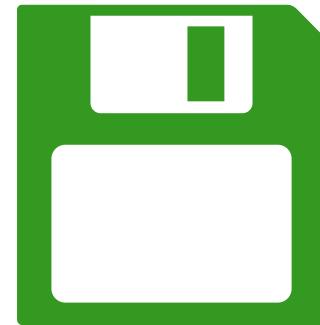


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Save, Schedule & Share

Saving, Scheduling & Sharing Reports



Save for reuse



Schedule delivery

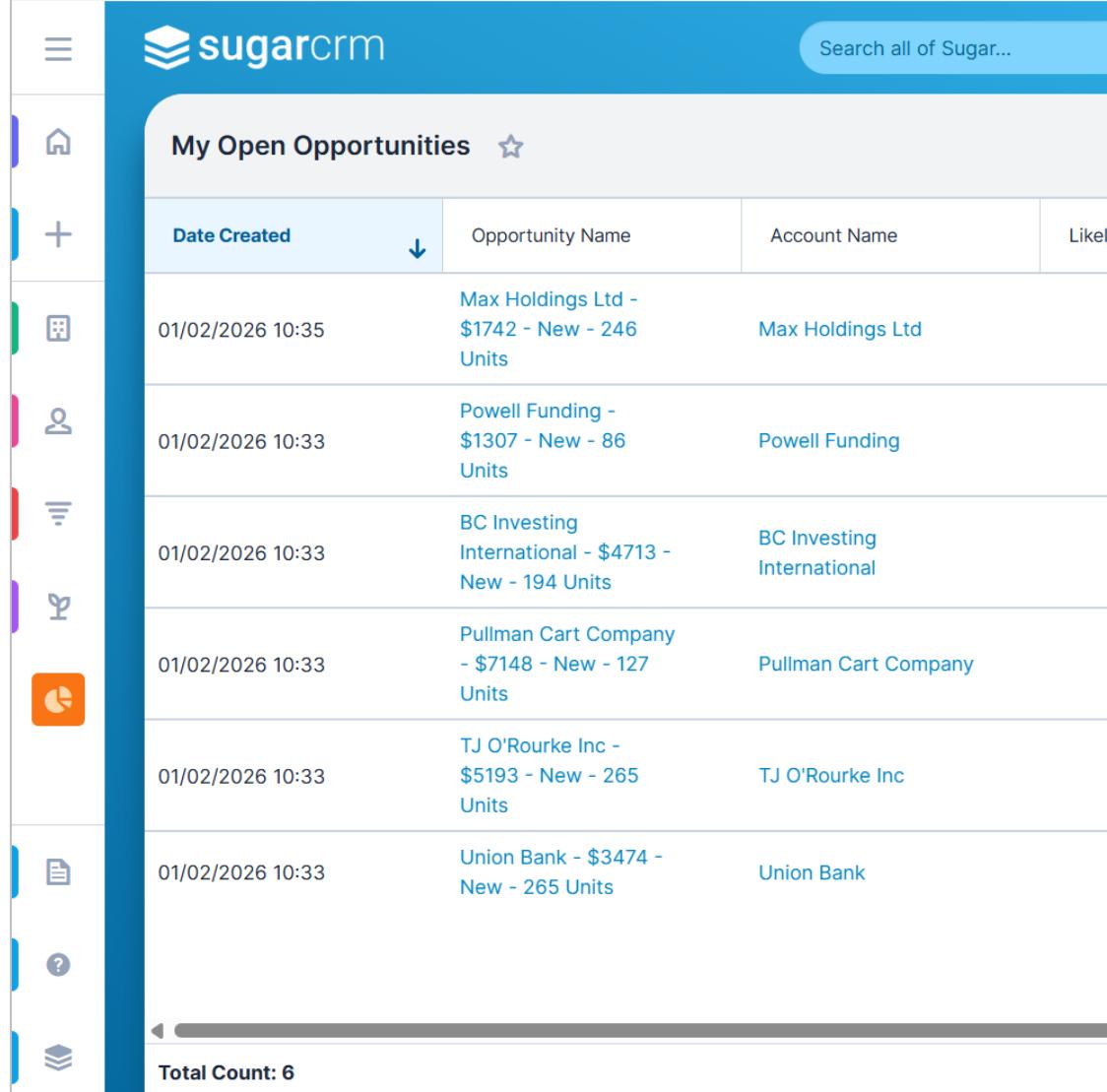


Share with teams

Use Enhanced Forecasting & Advanced Reports

When Standard Reports Aren't Enough

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



The screenshot shows the SugarCRM interface with a sidebar on the left containing various icons for navigation. The main area is titled 'My Open Opportunities' with a star icon. A dropdown menu for sorting is open, showing 'Date Created' with a downward arrow. The list displays six opportunities, each with a creation date, name, and account name. At the bottom, a message indicates a total count of 6.

Date Created	Opportunity Name	Account Name
01/02/2026 10:35	Max Holdings Ltd - \$1742 - New - 246 Units	Max Holdings Ltd
01/02/2026 10:33	Powell Funding - \$1307 - New - 86 Units	Powell Funding
01/02/2026 10:33	BC Investing International - \$4713 - New - 194 Units	BC Investing International
01/02/2026 10:33	Pullman Cart Company - \$7148 - New - 127 Units	Pullman Cart Company
01/02/2026 10:33	TJ O'Rourke Inc - \$5193 - New - 265 Units	TJ O'Rourke Inc
01/02/2026 10:33	Union Bank - \$3474 - New - 265 Units	Union Bank

Total Count: 6

```
1  SELECT u.user_name 'User Name'  
2  ,CONCAT(IsNULL(u.first_name,''), ' ', IsNULL(u.last_name,'')) 'Full Name'  
3  ,u.title 'Title'  
4  ,u.department 'Department'  
5  ,r.name 'Role'  
6  
7  FROM users u  
8  JOIN acl_roles_users ur on ur.user_id = u.ID  
9  JOIN acl_roles r on r.id = ur.role_id  
10  
11 WHERE r.deleted=0  
12 AND ur.deleted = 0  
13 AND u.deleted=0  
14 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	

Reports

Forecast Accuracy

Enhanced Forecasting Reports

Fiscal Calendar Live Query

Query Layout

Visualizations

Stacked Column

Fields

sales

=A Lag Sales Stage ID

=A Lag Sales Stage ID Dyn...

A Sales Geo (State)

A Sales Stage

A Sales Stage ID

A To Sales Stage

A To Sales Stage ID

=# Sales Cycle Length

=# Sales Stage Ordinal

Color Stack

A Sales Stage

X-Axis

A Assigned to

Metrics

SUM Likely

Slicer

Drop fields here

Likely (\$)



Sales Stage
■ Prospecting
■ Qualification
■ Proposal/Price Quote

Built for sales
forecasting

Quotas, rollups, and
visibility

Designed for managers
and reps

Expected Close
Date: this calendar

Q&A and Next Steps

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

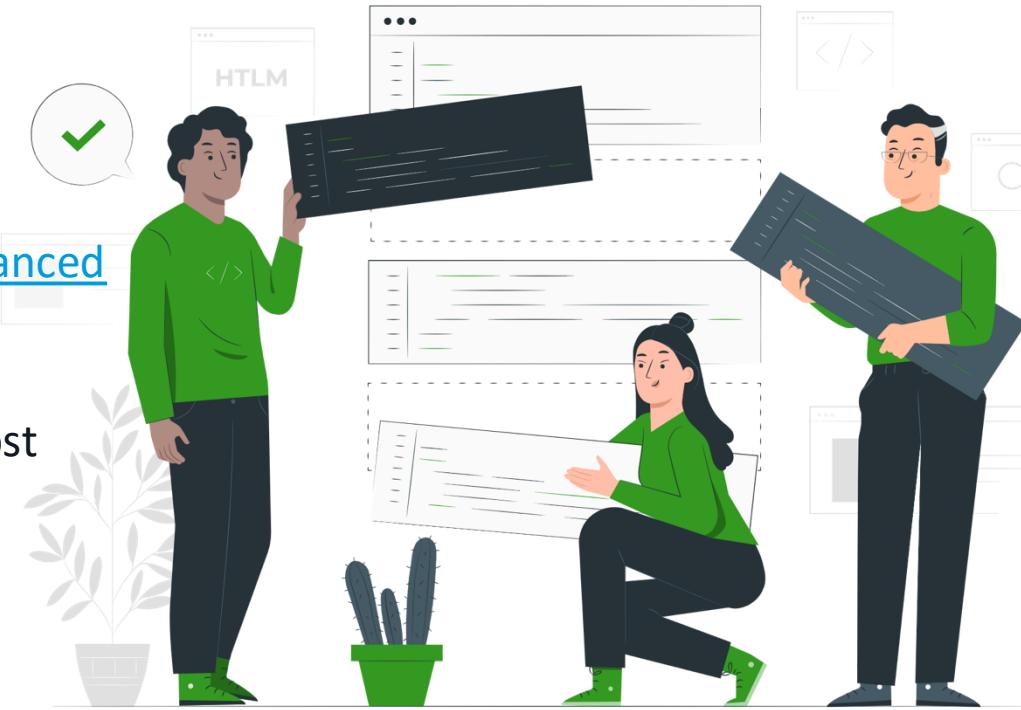
[Standard vs. Enhanced Forecasting in Sugar Sell & Sugar Enterprise](#) post

[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



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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Thank you for attending.