



Seeing Success: Building Actionable Dashboards in Sugar

Sugar Sell Foundations Webinar Series

Andrea Ayers, Sr. Product Trainer & Instructional Designer

February 2026

1

Andrea Ayers

Sr. Product Trainer & Instructional Designer

Certified Sugar Admin Specialist (CSAS)

SugarUniversity

Austin, TX



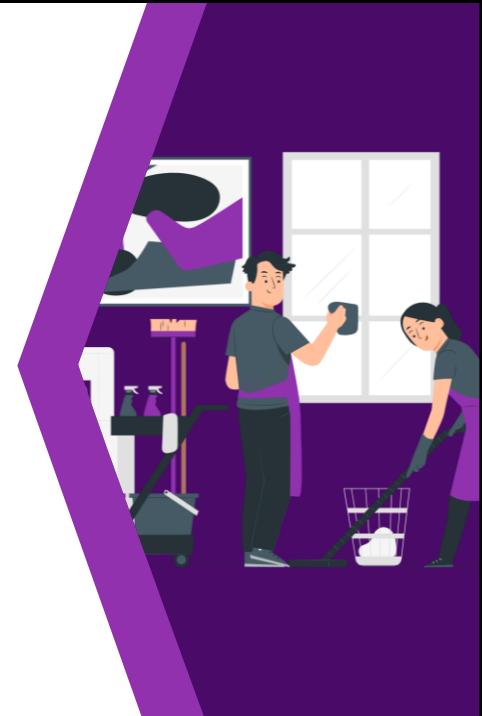
© 2026 SugarCRM Inc. All rights reserved.



2

Housekeeping & What to Expect

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



3

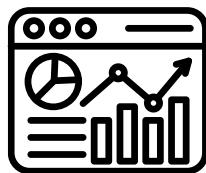
Why Dashboards Matter?

- Visibility drives better decisions
- Dashboards connect strategy to execution



4

What You'll Learn Today



Build Dashboards Using Templates



Create Standard, Sharable Views



Run Meetings from dashboards



Best practices and examples

© 2026 SugarCRM Inc. All rights reserved.

 sugarcrm

5

Out-Of-The-Box Dashboard Templates

© 2026 SugarCRM Inc. All rights reserved.

 sugarcrm

6

What Is a Dashboards & Dashlets in Sugar?

Dashboards

- Collection of dashlets
- Available across Sugar views

Dashlets

- Individual data components
- Charts, lists, metrics

The screenshot shows the SugarCRM interface with the title 'My To-Do Dashboard'. It features several dashlets:

- Active Tasks:** Shows 10 Due Now, 10+ Upcoming, and 1 To Do. Examples include 'Arrange reference call' (Overdue), 'Setup evaluation' (Overdue), 'Identify potential blockers' (Overdue), and 'Send local user group information' (Overdue).
- Planned Activities:** Shows 10+ Meetings and 10+ Calls. Examples include 'Discuss pricing' (Overdue), 'Demo' (Overdue), and 'Workshop with a Sales Engin...' (Overdue).
- My New & Assigned Leads:** A table listing leads with columns for Name, Status, and Account Name. Examples include Todd Johnston (New, Fireworks LLC), Daniel Morgan (New), Sofia Alvarez (New), Don James (New, TK Pickers), and Richard Elliott (New, Spend Thrift Inc).
- My Open Opportunities with NO Next Steps:** A table showing opportunities with columns for Name, Account Name, and Expected Close Date.

7

Dashboard Types & Visibility



Personal dashboards



Shared dashboards



Default dashboards

Why Start with Templates?

The screenshot shows the SugarCRM Sales Rep Dashboard. It includes a 'My Calendar' section with a weekly view from Monday, February 02, 2026, to Friday, February 06, 2026. A list of tasks is overlaid on the calendar, such as 'Identify champions', 'Validate demo story with Sales Engineer', and 'Send follow-up e-mail'. Below the calendar is a 'Sales Pipeline Chart' and a 'My Active Opportunities' table. To the right is a 'My Leads for Follow Up' list.

Prebuilt layouts



Faster setup



Consistency



9

Demo: Create Dashboard from Template

Select template

Duplicate and rename

© 2026 SugarCRM Inc. All rights reserved.



10

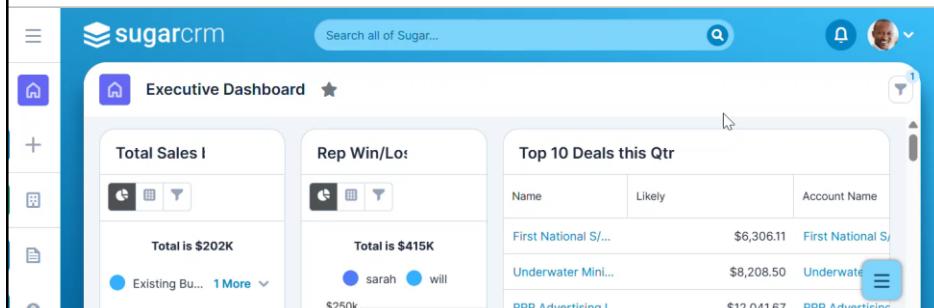
Creating Shareable Dashboards

© 2026 SugarCRM Inc. All rights reserved.



11

Customizing Your Dashboard



The screenshot shows the SugarCRM Executive Dashboard. It features three main cards: 'Total Sales' (Total is \$202K), 'Rep Win/Loss' (Total is \$415K), and 'Top 10 Deals this Qtr'. The 'Top 10 Deals' card includes a table with columns for Name, Likely, and Account Name, listing deals like 'First National S...' and 'Underwater Min...'. The dashboard has a blue header and sidebar, with a search bar and user profile at the top.

Edit filters

Resize & rearrange

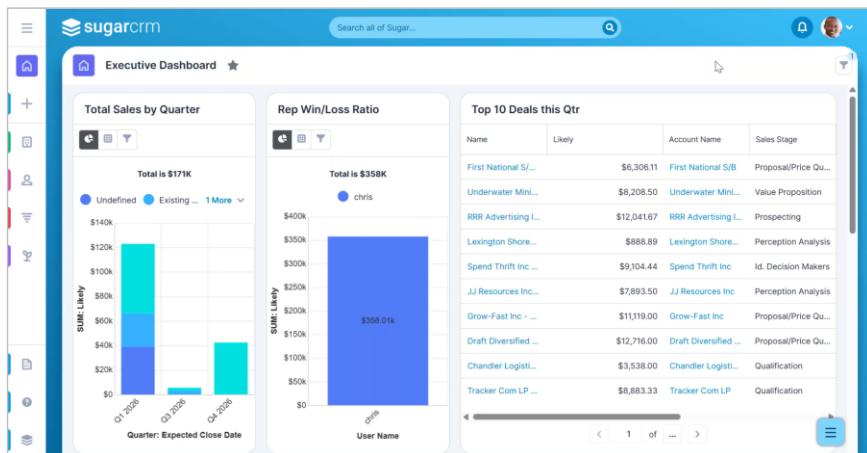
Focus on relevance

© 2026 SugarCRM Inc. All rights reserved.



12

Customizing Your Dashboard



Edit filters

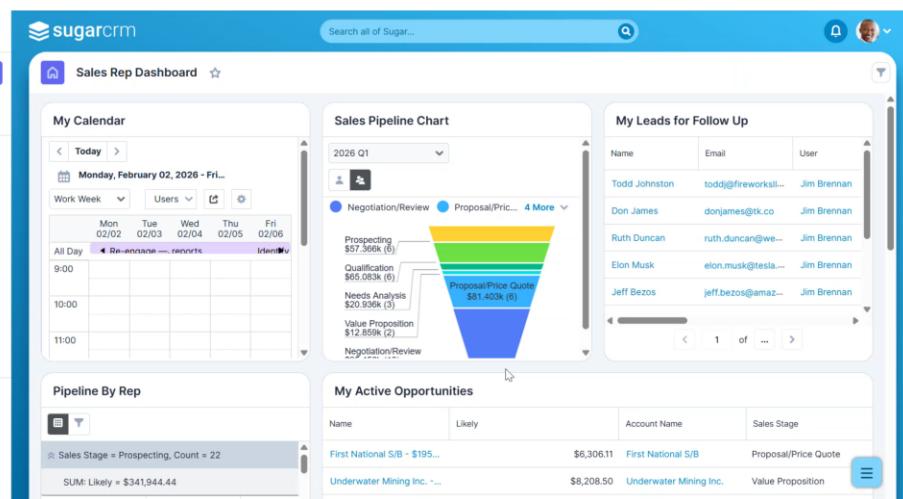
Resize & rearrange

Focus on relevance



13

Customizing Your Dashboard



Edit filters

Resize & rearrange

Focus on relevance



14

Personal vs Shared Dashboards

- Individual productivity
- Team alignment



 sugarcrm

15

Standardizing Team Dashboards

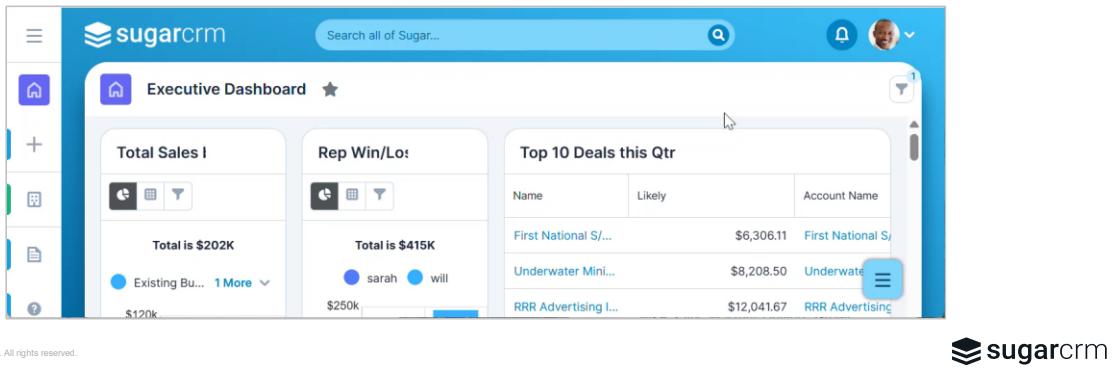
- Role-based views
- Naming conventions
- Reusability



16

Using Dashboard Filters

- Flexible views
- Less duplication



The screenshot shows the SugarCRM interface with the 'Executive Dashboard' selected. The dashboard features three main cards: 'Total Sales', 'Rep Win/Loss', and 'Top 10 Deals this Qtr'. The 'Top 10 Deals this Qtr' card is expanded, showing a table with columns for Name, Likely, and Account Name. The table lists three deals: 'First National S...', 'Underwater Mini...', and 'RRR Advertising I...'. Each deal row includes a small icon and a 'More' button. A filter icon is located in the top right corner of this card. The SugarCRM logo is visible in the top right corner of the dashboard area.

17

Demo: Sharing Dashboards

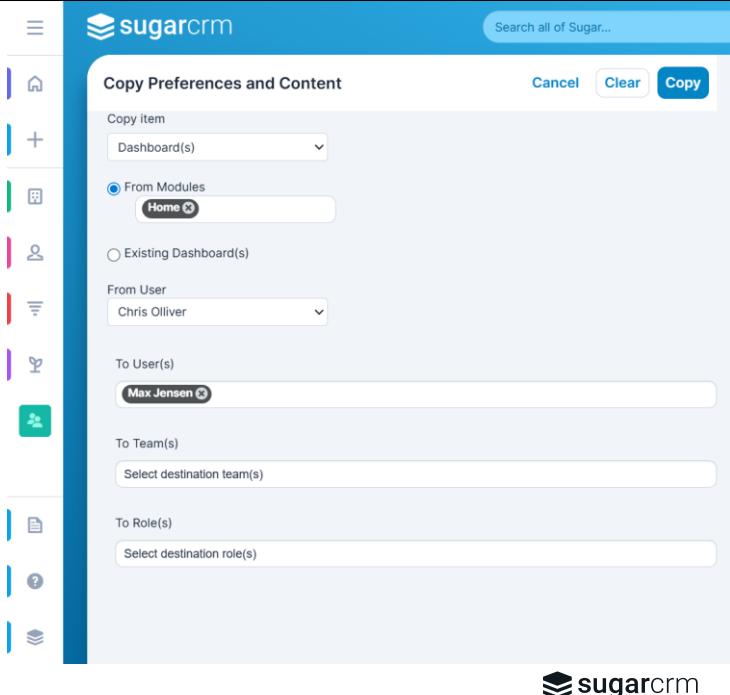
How End-User
Individually Sharing
a Dashboard

Two Ways that
Admin Can Share
Dashboards

Copy Preferences and Content

- **From Modules:** Select this option to copy all of the source user's dashboards from a designated module.
- **Existing Dashboards:** Select this option to locate specific dashboards to copy from the source user.

Note: When a dashboard is selected as a favorite by the source user, it will be identified as a favorite in all user accounts to which the dashboard is copied.



© 2026 SugarCRM Inc. All rights reserved.

19

Running Meetings from Dashboards

© 2026 SugarCRM Inc. All rights reserved.



20

Why Run Meetings from Dashboard

Why Dashboards=Better Meetings

- Replaces slide decks
- Uses real-time data
- Eliminates subjective updates
- Creates a **single source of truth** everyone can see
- Keeps meeting focused on *what to do next, not what happened*
- Makes Meetings shorter and more predictable



21

Meeting Types & Recommended Dashboards

Sales Pipeline / Forecast Meeting

How to run the meeting

Pipeline Review Dashboard

Recommended Dashlets

- Pipeline by Stage (weighted)
- Forecast vs. Quota (bar or gauge)
- Opportunities Closing This Month (list view)
- Deals Slipping This Period
- No-Activity Opportunities (last X days)

1. Start with Forecast vs. Quota
2. Drill into **Closing This Month**
3. Click directly into records for discussion
4. Update close dates or next steps live

Meeting Types & Recommended Dashboards

Sales Team 1:1 or Team Standup

Rep-Level Standup Dashboard

Recommended Dashlets

- My Open Opportunities
- Activities Due Today
- Overdue Activities
- Leads Without Follow-up
- Recently Updated Accounts

Filter dashboard by rep

Reassign or create activities in real time

How to run the meeting – Ask...

1. What's blocked?
2. What needs help today?
3. What can be closed this week?

© 2026 SugarCRM Inc. All rights reserved.



23

Meeting Types & Recommended Dashboards

Executive/Leadership Meeting

Executive Snapshot Dashboard

Recommended Dashlets

- Revenue YTD vs Target
- Pipeline Coverage Ratio
- Win Rate Trend
- Top 10 Deals
- Churn/Renewal Risk

Toggle time filter from month to quarter
Highlight one risk metric and drill down

Executives care about

- Trends, not transactions
- Risks and Opportunities
- Where to intervene

© 2026 SugarCRM Inc. All rights reserved.



24

Meeting Types & Recommended Dashboards

How to Run the Meeting Live in Sugar

Facilitator Playbook

1. Open the dashboard *before* the meeting starts
2. Set Filters (time period, team, region)
3. Share screen (no PowerPoint)
4. Click into records as questions come up
5. Capture decision directly in Sugar

Pro tip

If it doesn't live in Sugar by the end of the meeting, it probably won't happen.



© 2026 SugarCRM Inc. All rights reserved.

25

Common Mistakes (and How to Fix Them)

Mistakes

- ✗ Too many charts
- ✗ Historical-only data
- ✗ No ownership
- ✗ Dashboards no one uses outside meetings

Fix

- Assign an owner to each dashlet
- Review dashboards weekly
- Adjust dashboard as priorities change



© 2026 SugarCRM Inc. All rights reserved.

26

Close: Make Dashboards the Habit From Meeting to Momentum

- Key Takeaways
 - Dashboards turn meetings into working sessions
 - Sugar becomes the place where decisions are made – not just recorded
- Optional Call to Action
 - “Which meeting will you convert to a dashboard first?”

© 2026 SugarCRM Inc. All rights reserved.



27

Dashboard Design Principles for Meetings

- **Decision-first:** Every chart should answer “So what?”
- **Time-bound:** Current Week/Month/Quarter only
- **Role-specific:** leader ≠ rep ≠ exec
- **Actionable:** Clear owners and next steps

Best Practice

- Limit to **6-9 dashlets max**
- Use **List Views** over charts when action is required
- Avoid vanity metrics (e.g., total leads without conversion context)



28

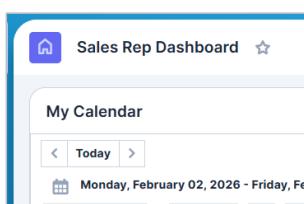
Q&A and Next Steps

© 2026 SugarCRM Inc. All rights reserved.



29

Key Takeaways



Start with
templates

My Leads for Follow Up	
Name	Email
Todd Johnston	toddj@fireworksl...
Don James	donjames@tk.co

Standardize
dashboards



Use dashboards
to run the
business

© 2026 SugarCRM Inc. All rights reserved.



30

Additional Resources

- [Dashboards and Dashlets Application Guide](#)
- [Dashboard Templates](#)
- [Take Advantage of Sugar's New Feature: Dashboard Filtering](#)
- [Using the Role-Based Dashboard Templates](#)
-



 sugarcrm

31

Questions?

32

Next Webinar in Series

Feb 10:
From Data to Direction – Mastering Reports in Sugar



33

sugarU | **Unlock sales potential**

© 2026 SugarCRM Inc. All rights reserved.

34