

Faye Business Systems Group

FayeBSG - SugarCRM Dashboard Manager v1.1







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Compatibilities

This software is currently compatible with:

Sugar v7.x – v7.6.1.0

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Table of Contents

Overview4	
Installation5	
Using the Dashboard Manager14	1
Creating a New Dashboard16)
Copying an Existing Dashboard19	1
Deploying Dashboards	,
Technical Notes	2





Overview

Sugar is the fastest growing CRM software package in the world. The FayeBSG Dashboard Manager is software that allows Sugar users to easily manage and deploy dashboards.

The **FayeBSG SugarCRM Dashboard Manager** gives users the ability to share their custom dashboards with other users. It also gives admin users the ability to create custom dashboards and deploy those dashboards to individual users, to a group of users in a team, or to group of users in a role.

Key Benefits

- Any user can copy their dashboard to the Dashboard Manager
- Create and/or edit Dashboards in the Dashboard Manager
- Deploy Dashboards to Users or groups of Users by Teams or Roles





Installation





Procedures – Installation

**Note: All examples and procedures shown were performed in Sugar v7.6

This application synchronizes data between Sugar and JIRA. The installation requires two steps:

A. Installation of the FayeBSG SugarCRM Dashboard Manager module within Sugar B. Configuration of module

You will need the following file from FBSG to complete the installation:

FBSGSugar-FBSG_Dashboard_Manager<version>.zip

- 1. Log in to your Sugar instance using an account with Administrative privileges.
- 2. Go to the Administration page within Sugar (Click "Admin" in the upper right corner).
- 3. Click "Module Loader"

newsletter campaigns.		nu emails. The email settin	gs must	be configured in order to e	enable (
e Email Settings		Configure email settings		A Inbound Email	Set mor mar acc	up group mail accounts for nitoring inbound email and nage personal inbound mail ount information for users	
Related Contacts E	mails	Enable/Disable emails from n (or linked) contacts to show in Subpanel.	elated n Email	Campaign Email Setting	gs Cor can	onfigure email settings for ampaigns	
e Email Queue		Manage the outbound email of	ueue	Email Archiving	Ena	able/disable the Sugar Email	
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Procedures – Installation

4. Click *"Choose File"* and locate the *FBSGSugar-FBSG_Dashboard_Manager<version>.zip* file Press *"Open"* and then click the *"Upload"* button.

👕 🔻 Accounts 👻	Contacts 👻	Opportunities 👻	Leads 👻	Administration	•	Search	•	٩	1	- 💮	+
Module Loader											
The following extensions	are installed on	this system:									
Name	¢	Action			E	Enable/Disable				Туре	
·											
Module Choose File	No file chose	n	Uplo	ad							

5. Click "Install" on the "FBSG Sugar – Dashboard Manager" to proceed.

						is.		
lote: To send record assign	ment notifi	cations, an	SMTP server must b	be configured	in Email Settings.			
Module Loader								
The following extensions are	installed (on this syste	em:					
Name	\$	Action	Enable/Disable	Туре	Versi	on Da	ate Installed	Description
								*
4								
Module Choose File N	lo file cho	sen		Upload				• • • • • • • • • • • • • • • • • • •
Module Choose File N Name	lo file cho: ≑	sen	Delete	Upload	Version	Date Published	Uninstallable	Descrip





6. Click the *"Accept"* radio button to accept the license agreement, and click *"Commit"* to begin the installation.

Ready To	Install									
License	Readme									
Please read th	e following Lic	ense Aaree	ement:							
END USER LI	CENSE AGR	EEMENT								
Offer: Fave B	usiness Syste	ems Group	Inc. ("FBSG") is	willing to grant	vou a license of	the sco	pe described herein o	nlv		
				mining to grant	, ou u noonoo or					
upon the cond	litions that you	u or someo	ne acting on you	direction and b	ehalf, such as th	ne Distri	butor: (a) has provided	1		
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**Note: This process may take a few minutes to complete

- 7. The module will load the main components of the FayeBSG Dashboard Manager
- 8. Then click "Back to Module Loader" to return to the Module Loader page

👕 🗝 Accounts 👻 Contacts 👻 Opportunities 👻 Leads	Administration 🗸 S	Search 👻 Q	1 🛞 - +
Note: To send record assignment notifications, an SMTP server must be of 100%	onfigured in <u>Email Settings</u> .		
Display Log Installing Language Packs Rebuilding Language Packs Rebuilding Languageen_uis Installing languageen_uis Installing layoutdets extension Rebuilding ActionYiewMap Rebuilding ActionYiewMap Rebuilding ActionYiewMap Rebuilding ActionYiewMap Rebuilding ActionYiewMap Rebuilding ActionYiewMap Rebuilding EntryPointRegistry Rebuilding Extensions Rebuilding Jayoutdets Rebuilding Jayoutdet Tasks Rebuilding ScheduledTasks Rebuilding ScheduledTasks Rebuilding ScheduledTasks Rebuilding Varlefs Rebuilding Jagoutdefs Rebuilding Jagoutdefs Rebuilding Jage Varlefs Rebuilding Jage JabelDictionary Rebuilding Layoutdefs Rebuilding Layoutdefs Rebuilding Layoutdefs Rebuilding Layoutdefs Rebuilding Layoutdefs Rebuilding Layoutdefs Rebuilding Jage ZashboardManager Module Installed Successfully			
Back to Module Loader			





9. From the Module Loader page click on the Admin Icon in the upper right corner and select the Admin link

- Accounts - C	Contacts 👻	Opportu	nities – Le	ads 🔻 Adr	ministration 🗸 Search	ı –	۹ 1)- +
ote: To send record assign	iment notifica	ations, an Sl	MTP server mus	t be configured	<mark>t in <u>Email Settings</u>.</mark>			R	Profile
loquie Loader								**	Employees
he following extensions are Name	e installed on ⇔	this system Action	n: Enable/Disable	e Type	Version	Date Installed		Q ⁰	Admin
-BSG Sugar - Dashboard N	lanager	Uninstall	Disable	module	1.1	10/30/2015 05:18pm	FayeBS	0	About
								۲	Log Out
4									+
Module Choose File	lo file chose	20		Upload					
would Choose File	to me chose	511		opioad					

10. Under the System tools locate and click "Repair"

System			
Configure the system-w	vide settings according to the specification	ns of your organization.	Users can override some of the default
ocale settings within the	eir user settings page.		
System Settings	Configure system-wide settings	Import Wizard	Use the import wizard to easily import records into the system
50 Locale	Set default localization settings for your system	50 <u>Currencies</u>	Set up currencies and conversion rates
Backups	Backup Sugar files	50 Languages	Manage which languages are available for users
🖌 <u>Repair</u>	Check and repair Sugar	Search	Select modules for the Global Search and configure full-text searching.
Se Diagnostic Tool	Capture system configuration for diagnostics and analysis	Connectors	Manage connector settings
😪 <u>Tracker</u>	Enable/Disable tracking	Scheduler	Set up scheduled events
PDF Manager	Manage templates for generated PDF files	Mobile	Select modules to appear in the browser-based mobile view and in the Sugar Mobile application
19 Web Logic Hooks	Manage Sugar Web Logic Hooks	- OAuth Keys	OAuth key management





11. Then select "Quick Repair and Rebuild"

Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
	Creates teams for users
Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
Kebuild .htaccess File	Rebuilds .htaccess to limit access to certain files directly
Kebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly declared
A Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache
Kebuild Relationships	Rebuilds relationship metadata and drops the cache file
Kebuild Schedulers	Rebuilds out-of-the-box Scheduler Jobs
<u>Rebuild Sugar Dashlets</u>	Rebuilds the Sugar Dashlets cache file
Kebuild WorkFlow	Rebuilds the workflow cache & compile plugins after you re-install, drop tables or install a new workfl plugin
<u> Rebuild Javascript Languages</u>	Rebuilds javascript versions of language files
A Dobuild IS Comproseed Files	Copies original Full US Source files and replaces existing compressed US files

12. After the Repair and Rebuild is complete scroll to the bottom of the page and click on the *"Return to Administration Page"* link

Audit table for Quotes already exists, skipping			 			
ProductBundleNote not Audit Enabled						
Audit table for Products already exists. skipping						
ProductBundle not Audit Enabled						
Audit table for RevenueLineItems already exists. skipping						
Shipper not Audit Enabled						
TaxRate not Audit Enabled						
TimePeriod not Audit Enabled						
TimePeriod not Audit Enabled						
TimePeriod not Audit Enabled						
TimePeriod not Audit Enabled						
TimePeriod not Audit Enabled						
TimePeriod not Audit Enabled						
Eorecast not Audit Enabled						
ForecastWorksheet not Audit Enabled						
Audit table for ForecastManagerWorksheets already exists, skipping						
ForecastOpportunities not Audit Enabled						
ForecastDirectReports not Audit Enabled						
Audit table for Quotas already exists. skipping						
WorkFlow not Audit Enabled						
WorkFlowTriggerShell not Audit Enabled						
WorkFlowAlertShell not Audit Enabled						
work-lowAlert not Audit Enabled						
work-lowActionShell not Audit Enabled						
worknowAction not Audit Enabled						
System not Audit Enabled						
KBDocument not Audit Enabled						
KBDocumentRevision not Audit Enabled						
KBTag not Audit Enabled						
KBDocumentKBTag not Audit Enabled						
Audit table for KBContents already exists. skipping						
ContractType not Audit Enabled						
ProjectResource not Audit Enabled						
Holiday not Audit Enabled						
not Audit Enabled						
Styleguide not Audit Enabled						
Augurtable for Notificationss already exists, skipping						
OAuthKov pot Audit Enabled						
OAuthToken not Audit Enabled						
SugarEavorites not Audit Enabled						
WebLogicHook not Audit Enabled.						
Activity not Audit Enabled						
Comment not Audit Enabled						
Subscription not Audit Enabled						
Filters not Audit Enabled						
Dashboard not Audit Enabled						
PdfManager not Audit Enabled						
tbsg_ConstantContactIntegration not Audit Enabled						
Audit table for fbsg_CCIErrorss already exists. skipping						
Augit table for tbsg_CCIntegrationLogs already exists, skipping						
https://www.confouration.not.audit.Enabled						
Audit table for freq. DaebhoardManagers already evicts alreads						
Done						
Database tables are surreed with						
Database tables are synced with vardets						
Return to Administration page						
Change of Contraction of Contractio						





13. After clicking on the Return to Administration Page link go again to the System tools locate and select *"Repair"* and then locate and click on *"Repair Roles"*

👕 – Accounts – Contacts – C	Opportunities - Leads - Administration - Search - Q 1 🛞
Repair	
Quick Repair and Rebuild	Repairs and rebuilds DB, Extensions, Vardefs, Sugar Dashlets etc.
↑ Upgrade Teams	Creates teams for users
Expand Column Width	Expands certain char, varchar and text columns in database (MSSQL ONLY)
Kebuild .htaccess File	Rebuilds .htaccess to limit access to certain files directly
A Rebuild Config File	Rebuilds config.php by updating version and adding defaults when not explicitly declared
A Rebuild Sugar Logic Functions	Rebuilds Sugar Logic functions cache
A Rebuild Relationships	Rebuilds relationship metadata and drops the cache file
Kebuild Schedulers	Rebuilds out-of-the-box Scheduler Jobs
A Rebuild Sugar Dashlets	Rebuilds the Sugar Dashlets cache file
Kebuild WorkFlow	Rebuilds the workflow cache & compile plugins after you re-install, drop tables or install a new workflow plugin
A Rebuild Javascript Languages	Rebuilds javascript versions of language files
A Rebuild JS Compressed Files	Copies original Full JS Source files and replaces existing compressed JS files
A Rebuild Sidecar Files	Copies original Sidecar Full JS Source files and replaces existing compressed JS files
A Rebuild JS Grouping Files	Re-concatenates and overwrites existing group files with latest versions of group files
A Rebuild Minified JS Files	Copies original Full JS Source Files and minifies them, then replaces existing compressed files
P Repair JS Files	Compresses Existing JS files - includes any changes made, but does not overwrite original JS Source files
P Repair Non-Lowercase Fields	Repair mixed-case custom table(s) and metadata file(s) to fix issues where code expects lowercase field names
🖋 <u>Repair Teams</u>	Rebuilds private team memberships based on user reporting hierarchy
Repair Roles	Repairs Roles by adding all new modules that support Access Controls, and by adding any new Access Controls to existing modules
P Repair Oracle VARCHAR2 Columns	Changes the semantics of VARCHAR2 columns from byte to char, necessary for UTF-8, MBCS support
<u>Rebuild fulltext indices</u>	Triggers a rebuild of fulltext indices. Oracle 9i owners should run this frequently.
Repair Inbound Email Accounts	Repairs Inbound Email accounts and encrypts account passwords





14. Repair Roles does not provide a progress bar of any kind, but it is safe to assume that when the modules most recently installed appear on the screen at the bottom of the list that the Repair Roles has completed.

Note: To send record assignment notifications, an SMTP server must be configured in Email	Settings	
Adding for Leads	Oettings.	
Adding for Cases		
Adding for Burgs		
Adding for Prospect lists		
Adding for Prospects		
Adding for Project		
Adding for ProjectTask		
Adding for Campaigns		
Adding for EmailMarketing		
Adding for Lears		
Adding for Contacts		
Adding for Accounts		
Adding for Opportunities		
Adding for EmpilTemplates		
Adding for Notes		
Adding for Calls		
Adding for Emails		
Adding for Medians		
Adding for Tasks		
Adding for Lears		
Adding for Trackers		
Adding for Trackers		
Adding for Trackers		
Adding for Administration		
Adding for Documents		
Adding for Belationshins		
Adding for Reports		
Adding for Quotes		
Adding for Products		
Adding for ProductCategories		
Adding for Forecasts		
Adding for Contracts		
Adding for KBDocuments		
Adding for Notifications		
Adding for EAPM		
Adding for WebLogicHooks		
Adding for PdfManager		
Adding for fbsg ConstantContactIntegration		
Adding for fbsg_CCIErrors		
Adding for fbsg_CCIntegrationLog		
Adding for fbsg_DropboxAccessManagement		

15. After Repair Roles has finished click on the Admin icon and select the Admin link

👕 🕶 Accounts 👻 Contacts 👻 Opportunities 👻 Leads 👻 Administration 🗸 Search 🗾 🔍	1 🛞 - +
Database tables are synced with vardefs	👷 Profile
	Employees
	😋 Admin <
	About
	🕞 Log Out

T





16. Once in the Admin page scroll to the bottom where you will see the *"FayeBSG Sugar Dashboard Manager"*

** Note: You may have to log out and log back in after you "execute" in order for the "Constant Contact Control Panel" to appear in the Admin screen (see below screen shot).

Maintain a list of releases for vo	ur product. Active releases are display	ed in the Releases dro	pp-down menus in bug reco	rds
created within the Bug Tracker	module.			
Releases Man	age releases and versions			
Forecast				
Configure admin setting for the Worksheet Columns, and Scena	Forecasts module. The Forecasts Set arios.	tings will include Time	Period, Forecasts Ranges,	
Forecasts Cont	igure Forecasts Module			
Contracts Define contract types for the Co	ntracts module. When users create a	contract, the Types dro	p-down menu displays the	contract
types for selection.				
Contract Types Man	age contract types			
Contract Types Man Constant Contact Integrati Synchronize contacts, campaig	age contract types on ns, and campaign results from Consta	nt Contact		
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Constant Contact Integration Synchronize contacts, campaig Constant Contact Control Par Sugar Dropbox Integration Sugar Dropbox Integration Con Sugar Dropbox Configuration Setting FayeBSG Sugar Dashboar	age contract types on ns, and campaign results from Constan el figuration and Settings Manage settings, options, and configurable displays for the Sugar Dropbox Integration d Manager	nt Contact		





Using the Dashboard Manager





Using the Dashboard Manager

**Note: You may have to log out and log back in after you "execute" in order for the "Constant Contact control panel" to appear in the admin screen (see below screen shot).

1. Navigate to the "Admin" screen, scroll to the bottom, and click on the "FayeBSG Sugar Dashboard Manager" link

Releases Manage releases and versions Forecast Configure admin setting for the Forecasts module. The Forecasts Settings will include Time Period, Forecasts Ranges, Worksheet Columns, and Scenarios. Image Forecasts Configure Forecasts Module Contracts Define contract types for the Contracts module. When users create a contract, the Types drop-down menu displays the contract types for selection. Image Contract Types Manage contract types Constant Contact Integration Synchronize contacts, campaigns, and campaign results from Constant Contact Image Dropbox Integration Sugar Dropbox Integration Configuration and Settings Image Settings, options, and configuration and Settings Manage settings, options, and configuration and Settings Image Dropbox Configuration Settings Manage settings, options, and configuration for the Sugar Dropbox Integration Sugar Dropbox Configuration Settings Manage settings, options, and configuration and Settings Image Settings Configuration Configuration Settings FaveBSG Sugar Dashboard Manager Configuration Settings		
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Configure admin setting for the Forecasts module. The Forecasts Settings will include Time Period, Forecasts Ranges, Worksheet Columns, and Scenarios. Configure Forecasts Module Contracts Define contract types for the Contracts module. When users create a contract, the Types drop-down menu displays the contract Contracts Manage contract types Manage contract types Manage contract types Constant Contact Integration Synchronize contact, campaigns, and campaign results from Constant Contact Contact Control Panel Sugar Dropbox Integration Sugar Dropbox Integration Manage settings, options, and configurable displays for the Sugar Dropbox Configuration Settings FaveBSG Sugar Dashboard Manager	Forecast	
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· · · · · · · · · · · · · · · · · · ·	Constant Contact Synchronize contacts Constant Contact Sugar Dropbox Integ Dropbox Configura	t Integration s, campaigns, and campaign results from Constant Contact Control Panel Itegration Iration Configuration and Settings Ition Settings Manage settings, options, and configurable displays for the Sugar Dropbox Integration





Using the Dashboard Manager (continued)

2. When you first log in to the Dashboard Manager there will be no data available

👕 – Accounts – Contacts – Opportunities – I	Dashboa	rd Manager 🔻	~	Search		₹ Q	1	- 👰	+
Dashboard Manager								Create	«
Filter • Create Search by name								E	٢
Name	\$	Assigned to		\$	Date Modified				¢
▲									+
		No data available							

- 3. There are two ways to add a Sugar Dashboard to the Dashboard Manager.
 - Create a new Dashboard within the Dashboard Manager
 - Copy an existing Dashboard from the Home page to the Dashboard Manager, please refer to page 19 for this option

Creating a New Dashboard

4. To create a new Dashboard within the Dashboard Manager click on the "Create" button

👕 🔻 Accounts 👻 Contacts 👻 Opportunities	👻 Dashboard Manager 👻 🗸	Search 👻 🔍	1 💮 - +
Dashboard Manager			Create
Filter • Create Search by name			
Name Name	Assigned to	Date Modified	0
	No data available		

5. A drawer will appear where you can enter a name for the new Dashboard

-	Accounts 👻	Contacts 🤝	Opportunities 👻	Dashboard Manager 🔻	~	 I 	Sear	ch	-	٩	1	@ -	+
	Name New Dashb	board		Cancel	Save	• •	*						
Assigned	to												
Adminis	strator					×	-						
Show mo	pre												





Using the Dashboard Manager - Creating a New Dashboard

6. This will create a new blank Dashboard. Click on the name of the Dashboard to edit it.

👕 🔻 Accounts 👻 Contacts 👻	Opportunities 👻 Dashboa	ard Manager 🔻	✓ Search	- Q	1 👰 - 🕂	
	Success You successfully crea	ated the dashboard	manager <u>New Dashboa</u>	<u>rd</u> . ×		
Dashboard Manager					Create «	
Filter - Create Search by name						
Name	\$	Assigned to	\$	Date Modified	٥	
> New Dashboard		Administrator		10/30/2015 05:42pm	۰ -	
<						۶.

7. From within the edit view click on the "Edit" button to begin editing the Dashboard

👕 👻 Accounts 👻	Contacts 👻	Opportunities 🤟	Dashboard Manager 🔻	*	Search	~ Q	1	@ - +	
New Dashboard								Edit 👻	←

8. From the edit view you can choose between a 1, 2, or 3 column Dashboard layout by using the column toggle highlighted below

**Note: The default setting is a two column layout







<u>Using the Dashboard Manager – Creating a New Dashboard (continued)</u>

9. After selecting you can begin to add rows and dashlets.

👕 🗝 Accounts 👻 Contacts 👻 Opportunities 👻	Dashboard Manager 👻 🖣	🗸 Search – 🛛 🔁 🚱 – 🕇
New Dashboard		Cancel Delete Save
Add a Row +1 column		Add a Row +1 column
📬 🔹 Accounts 👻 Contacts 💌 Opportunities 💌 New Dashboard	Dashboard Manager 👻	✓ Search ⊂ Q 1 Q ★ + Cancel Delete Save
Add a Row +1 column		I O
		Add a Row +1 column

10. When you are finished designing the layout click on the "Save" button

New Dashboard					Cancel Delete Save
		1 0			1 0
Active Tasks		+ 0	History		+ 0
		▲ 🛎	Last 7 Days	-	▲ 🛎
0 Due Now	0 Upcoming	0 To Do	0 Meetings	0 Emails	0 Calls
	No data available.			No data available.	
		10			
Fop 10 Sales		• I • •		Add a Row	
Top 10 Sales This Quarter		10		Add a Row +1 column	
Top 10 Sales This Quarter	No data available.	• • • •		Add a Row +1 column	
Top 10 Sales This Quarter	No data available. Add a Row	¢ 1 • •		Add a Row ≁1 column	





Using the Dashboard Manager (continued)

Copying an Existing Dashboard

- 11. To copy an existing Dashboard go the Home page and display the desired Dashboard
- 12. From the Home page click on the Action Menu of the "Create" button and select "Copy to Dashboard Manager"

Accounts Contacts	s – Opportuni	ties 👻 Leads 👻 Calendar 👻 🖌 Search	- a 1 👷
My Dashboard			Create
			Edit
Learning Resources	∧ ¢	Pipeline	Copy to Dashboard Manage
Sugar University Become a Sugar expert w training, videos, classes, w and certification.	vith upgrade webinars,	This Quarter	
Community Forums Join the discussion, probl and share ideas with othe	em solve, er users.	Top 10 Sales Opportunities	~ \$
Documentation & Sup Learn the details of how S and engage with support.	<mark>port</mark> Sugar works	No data available.	

Deploying Dashboards

- 13. There are two methods of deploying Dashboards, from the list view or the record view
- 14. To deploy Dashboards from the list view click on the Action menu dropdown of the Dashboard you want to deploy from the Dashboard Manager page

1 -	Accounts - Contacts -	Opportunities 👻	Dashboa	ard Manager 🔻	~	Search	•	Q 1	@ -	+
Dashbo	ard Manager								Create	*
Filter • C	reate Search by name									0
-	Name		\$	Assigned to		¢	Date Modified			¢
□ ☆	Administrator Dashboard			Administrator			10/30/2015 05:57	pm	۲	•
	New Dashboard			Administrator			10/30/2015 05:51	p Edit		
(Delete		
								Copy Das	hboard to Ro	les
								Copy Dasi	hboard to Tea	ams
								Copy Dasi	hboard to Us	ers





Using the Dashboard Manager – Deploying Dashboards (continued)

15. There are three options to choose from

- Copy Dashboard to Roles
- Copy Dashboard to Teams
- Copy Dashboard to Users
- 16. You can choose to add the Dashboard to multiple users or groups (Teams or Roles) by selecting multiple checkboxes

•	Accounts – Contacts – C	Opportunities 👻	Dashboard Mana	ger 🔻	~	Search	- Q	1	@	+
Search	and Select Roles							Cance	Lin	
Filter •	Create Search by name									
	Name	♦ Team	¢	Assigned	d to		\$ Date Modified		-	٥
	Tracker						10/15/2015 09:26am			۲
	Customer Support Administrator						10/15/2015 09:26am			۲
4	Marketing Administrator						10/15/2015 09:26am			۲
	Sales Administrator						10/15/2015 09:26am			۲

- 17. After selecting the users or groups click the link button to Add the Dashboard
- 18. To add a Dashboard from the record view click on the name of the Dashboard that you want to deploy

*	Accounts – Contacts – Opportunities – Da	ishboa	rd Manager 🔻	~	Search	~ Q	1	-	+
Dashboa	ard Manager							Create	«
Filter - C	reate Search by name							■	0
-	Name	\$	Assigned to		\$	Date Modified			¢
□ ☆	Administrator Dashboard		Administrator			10/30/2015 05:57pm		۲	•
>	New Dashboard		Administrator			10/30/2015 05:51pm		۲	•





Using the Dashboard Manager – Deploying Dashboards (continued)

19. Then click on the Action menu of the "Edit" button and select one of the three options

📫 – Accounts –	Contacts - Opportun	ties 👻 Dashboard Mana	ger 🔻 🗸	Search		- Q	1 👰 -	+
New Dashboard							Edit	-
						Сор	y Dashboard to Ro	oles
Active Tasks		+ 0	History			Сор	y Dashboard to Te	ams
		▲ 😤	Last 7 Day	/S		Сор	y Dashboard to Us	sers
0	0	0		D	0	L	0	_

- 20. Then follow steps 16 and 17 to add the Dashboard
- 21. To confirm that a Dashboard has been added click on the Action Menu of the *"Dashboard/Home"* button and you will see all the Dashboards associated with the active user

👕 🗕 Accounts 👻 Co	ontacts – Opportuni	ities 🔻 Leads 👻 Calendar 👻 💙 Search	n 🗸 🖬 🛞 -
+ Create Dashboard			Create
 Activity Stream 			
Help Dashboard	~ ¢	Pipeline	^
New Dashboard		This Quarter 👻	
🚯 Test	h upgrade ebinars,	No data a	available.
Dropbox			
My Dashboard	m solve	Top 10 Sales Opportunities	<u>^</u>

**Note: The active Dashboard is displayed with blue text

****Note:** Only Users with Admin privileges may deploy Dashboards to users or groups, BUT all users can copy their Dashboards to the Dashboard Manager





Technical Notes





Technical Notes

System requirements:

cURL and SimpleXMLElement enabled on web server Sugar v7.x - v7.6.1.0 Professional, Enterprise, or Ultimate Edition