



## Sugar Home Page



**SUGARCRM**<sup>®</sup>



# SUGARCRM<sup>®</sup>

## Learning Objectives

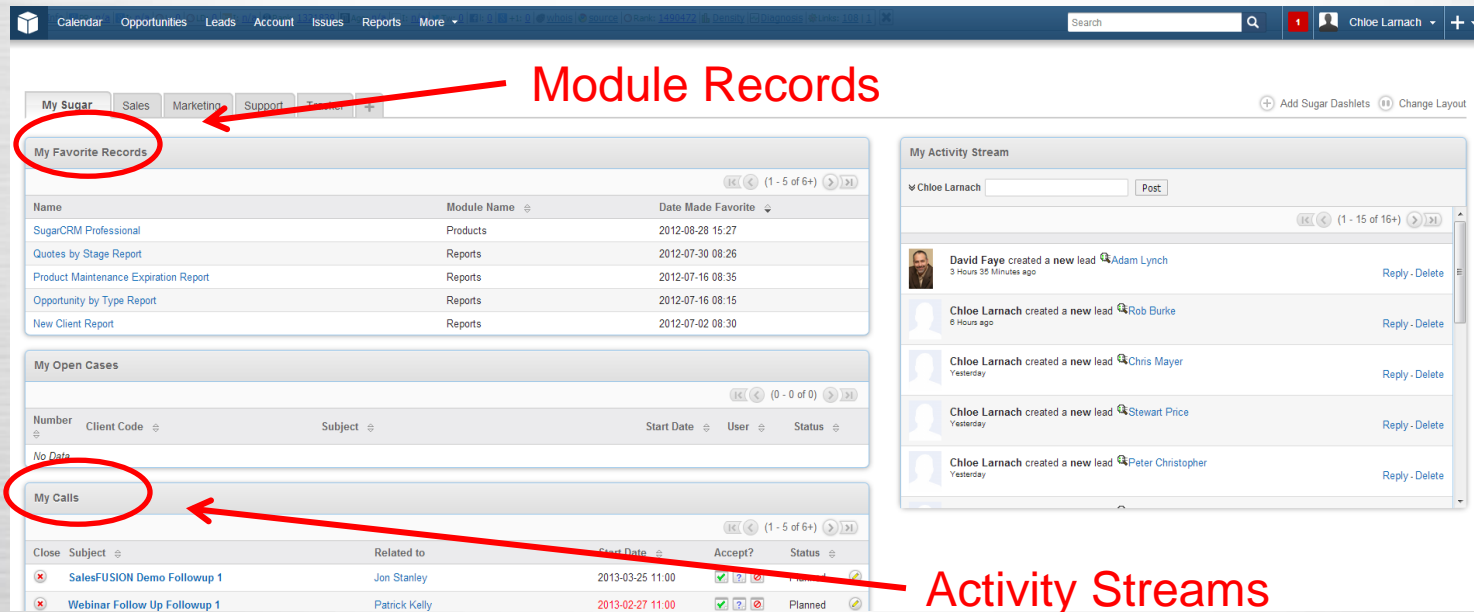
- Sugar Home Page
- My Sugar Page
- Sales Page
- Marketing Page
- Custom Page
- Dashlets



## Home Page

Your home page is designed to provide you with a centralized view of information that is important to you.

The home page allows you to get a quick overview of your customer related records.

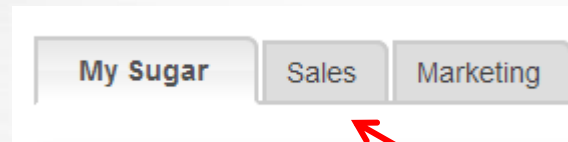


The screenshot shows the SugarCRM home page dashboard. The top navigation bar includes 'Calendar', 'Opportunities', 'Leads', 'Account', 'Issues', 'Reports', and 'More'. A search bar and user profile for 'Chloe Larnach' are on the right. The main content area is divided into several sections:

- Module Records:** A red arrow points to the 'My Sugar' tab in the top left, which is circled in red. Below it is the 'My Favorite Records' section, which is also circled in red. It contains a table with columns for Name, Module Name, and Date Made Favorite.
- My Open Cases:** A section below 'My Favorite Records' showing a table with columns for Number, Client Code, Subject, Start Date, User, and Status. It currently shows 'No Data'.
- My Calls:** A red arrow points to the 'My Calls' tab, which is circled in red. Below it is a table with columns for Close, Subject, Related to, End Date, Accept?, and Status.
- Activity Streams:** A red arrow points to the 'My Activity Stream' section on the right, which is circled in red. It displays a list of recent activities, such as 'David Faye created a new lead' and 'Chloe Larnach created a new lead'.

We group these records and activities into one place known as **dashlets** in a multi column layout.

There are 3 standard **Home Pages** in Sugar.

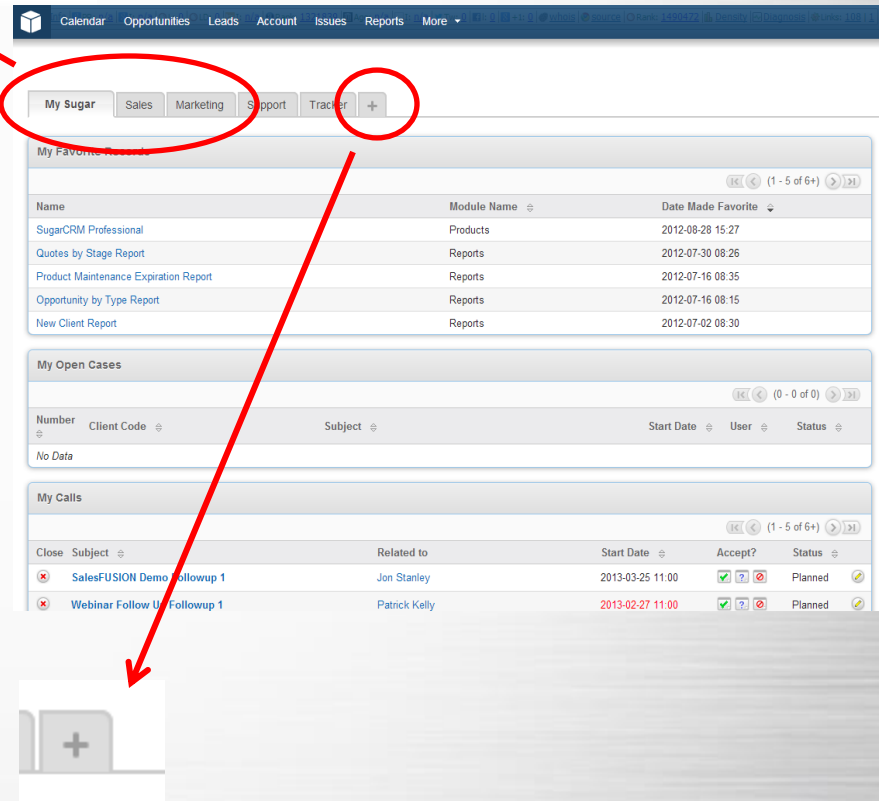


My Sugar – Shows the records assigned to you.

Sales – Shows sales related records and progress.

Marketing - Displays marketing campaign progress and lead generation information.

You can also create your own home page tab by clicking the plus sign.



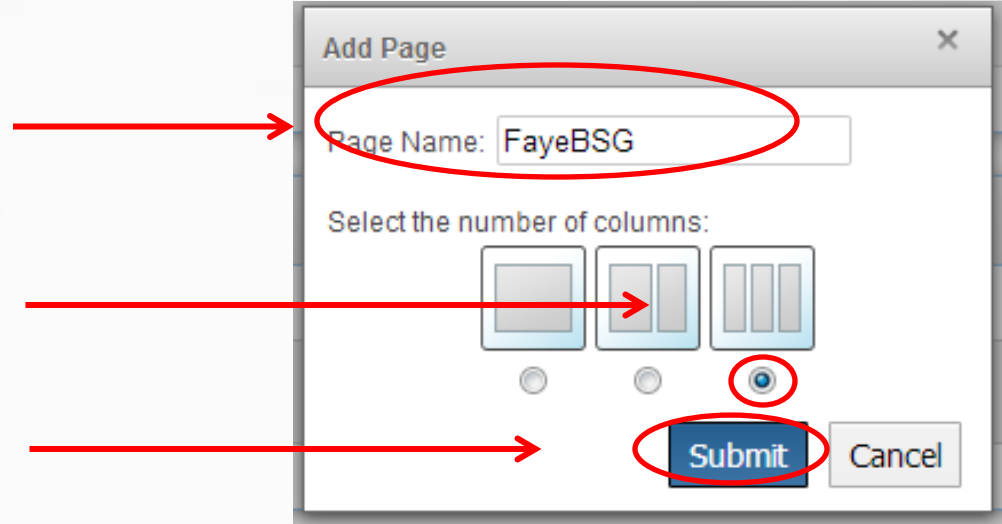
The screenshot shows the SugarCRM interface with a navigation bar at the top containing 'Calendar', 'Opportunities', 'Leads', 'Account', 'Issues', 'Reports', and 'More'. Below the navigation bar, there are tabs for 'My Sugar', 'Sales', 'Marketing', 'Support', and 'Tracker'. A red circle highlights the 'My Sugar' tab and a plus sign to its right. A red arrow points from the plus sign to a separate image of a plus sign in a grey box at the bottom of the page. Below the tabs, there are three sections: 'My Favorite Reports', 'My Open Cases', and 'My Calls'. The 'My Favorite Reports' section contains a table with the following data:

Name	Module Name	Date Made Favorite
SugarCRM Professional	Products	2012-08-28 15:27
Quotes by Stage Report	Reports	2012-07-30 08:26
Product Maintenance Expiration Report	Reports	2012-07-16 08:35
Opportunity by Type Report	Reports	2012-07-16 08:15
New Client Report	Reports	2012-07-02 08:30

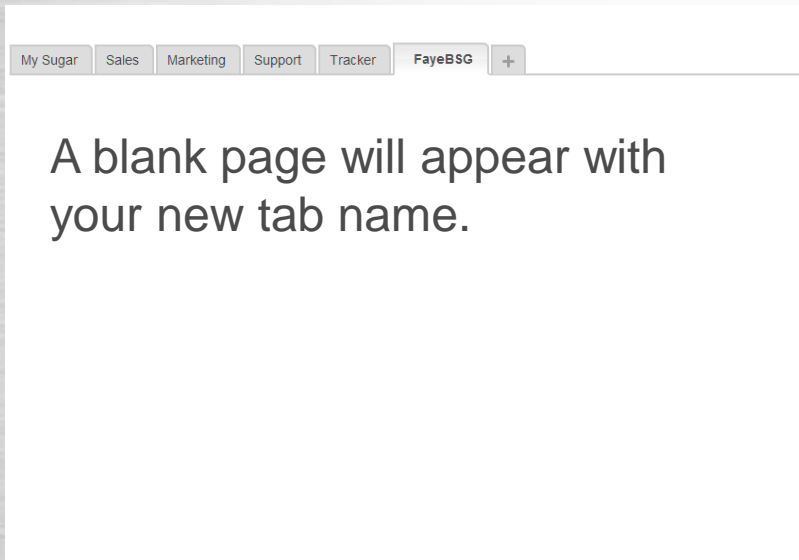
The 'My Open Cases' section shows 'No Data'. The 'My Calls' section shows a table with the following data:

Close	Subject	Related to	Start Date	Accept?	Status
<input checked="" type="checkbox"/>	SalesFUSION Demo Followup 1	Jon Stanley	2013-03-25 11:00	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Planned
<input checked="" type="checkbox"/>	Webinar Follow Up Followup 1	Patrick Kelly	2013-02-27 11:00	<input checked="" type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	Planned

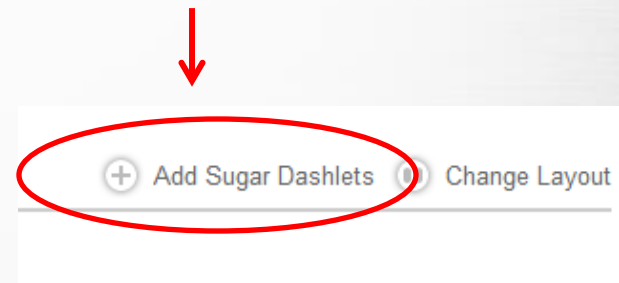
1. Enter the name of the tab.
2. Select the number of columns in which you would like to see your data.
3. Submit.

A screenshot of a software dialog box titled "Add Page". The dialog box has a close button (X) in the top right corner. It contains a text input field labeled "Page Name:" with the text "FayeBSG" entered. Below this is a section titled "Select the number of columns:" with three radio button options. The first option is a square icon, the second is a vertical bar icon, and the third is a vertical bar with a smaller vertical bar inside. The third option is selected. At the bottom right, there are two buttons: "Submit" and "Cancel". Red arrows and circles highlight the "Page Name" field, the second column option, and the "Submit" button.

Once you have created a new tab you can start adding the dashlets.

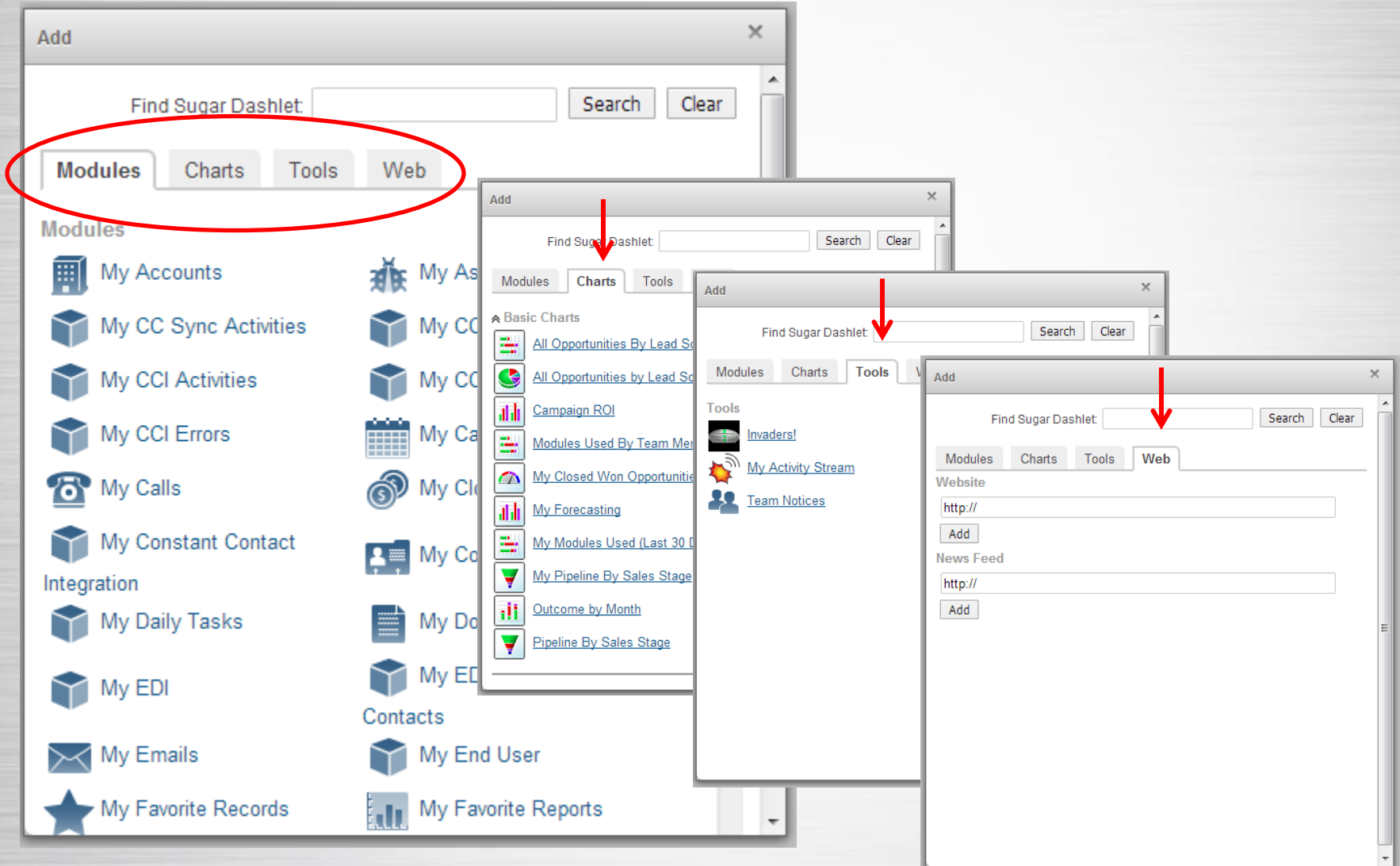


To add dashlets to your tab select **Add Sugar Dashlets** from the top right of the tab page.



## Dashlets

- Sugar Dashlets are user-configurable panels that allow you to specify the items that you want to view on your Home Page.
- A Sugar Dashlet displays a list of item records. Similar to the list view displayed on a module's home page.
- Sugar displays a collection of Dashlets for items such as meetings, activities, and accounts on your Home page.
- You can configure each Dashlet to display the rows, columns, and filters that you need. For example, you can change a Sugar Dashlet's title or choose to view only your items. You can add and remove Sugar Dashlets as needed.
- You can add multiple Sugar Dashlets of the same kind. For example, you can add multiple activity Sugar Dashlets and configure each one differently.
- You can add a maximum of 10 Sugar Dashlets on your Home page (the administrator can change this setting).



The image shows a sequence of four overlapping 'Add' dashlet windows in SugarCRM, illustrating the navigation path from the main menu to the 'Web' category. Red arrows indicate the sequence of clicks:

- Window 1:** The 'Add' dashlet menu is open. The 'Modules' tab is selected and circled in red. A red arrow points to the 'Modules' tab.
- Window 2:** The 'Add' dashlet menu is open. The 'Charts' tab is selected. A red arrow points to the 'Charts' tab.
- Window 3:** The 'Add' dashlet menu is open. The 'Tools' tab is selected. A red arrow points to the 'Tools' tab.
- Window 4:** The 'Add' dashlet menu is open. The 'Web' tab is selected. A red arrow points to the 'Web' tab.

The main 'Add' dashlet menu (Window 1) contains the following items:

- Find Sugar Dashlet:** Search and Clear buttons.
- Modules:** My Accounts, My CC Sync Activities, My CCI Activities, My CCI Errors, My Calls, My Constant Contact, My Daily Tasks, My EDI, My Emails, My Favorite Records, My As..., My CC..., My CC..., My Ca..., My Cl..., My Co..., My Do..., My ED...
- Integration:** My Daily Tasks, My EDI
- Contacts:** My End User, My Favorite Reports

The 'Charts' dashlet menu (Window 2) contains the following items:

- Find Sugar Dashlet:** Search and Clear buttons.
- Basic Charts:** All Opportunities By Lead Sc..., All Opportunities by Lead Sc..., Campaign ROI, Modules Used By Team Mer..., My Closed Won Opportunite..., My Forecasting, My Modules Used (Last 30 D..., My Pipeline By Sales Stage, Outcome by Month, Pipeline By Sales Stage

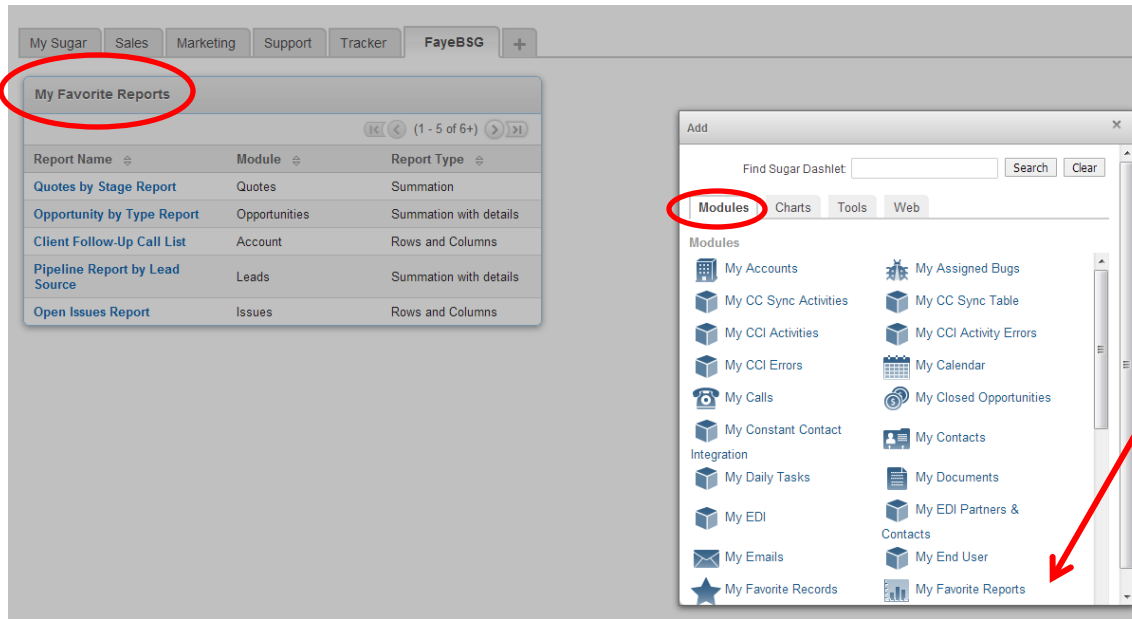
The 'Tools' dashlet menu (Window 3) contains the following items:

- Find Sugar Dashlet:** Search and Clear buttons.
- Tools:** Invaders!, My Activity Stream, Team Notices

The 'Web' dashlet menu (Window 4) contains the following items:

- Find Sugar Dashlet:** Search and Clear buttons.
- Website:** http:// [input field] Add
- News Feed:** http:// [input field] Add





My Sugar Sales Marketing Support Tracker FayeBSG +

**My Favorite Reports** (1 - 5 of 6+)

Report Name	Module	Report Type
Quotes by Stage Report	Quotes	Summation
Opportunity by Type Report	Opportunities	Summation with details
Client Follow-Up Call List	Account	Rows and Columns
Pipeline Report by Lead Source	Leads	Summation with details
Open Issues Report	Issues	Rows and Columns

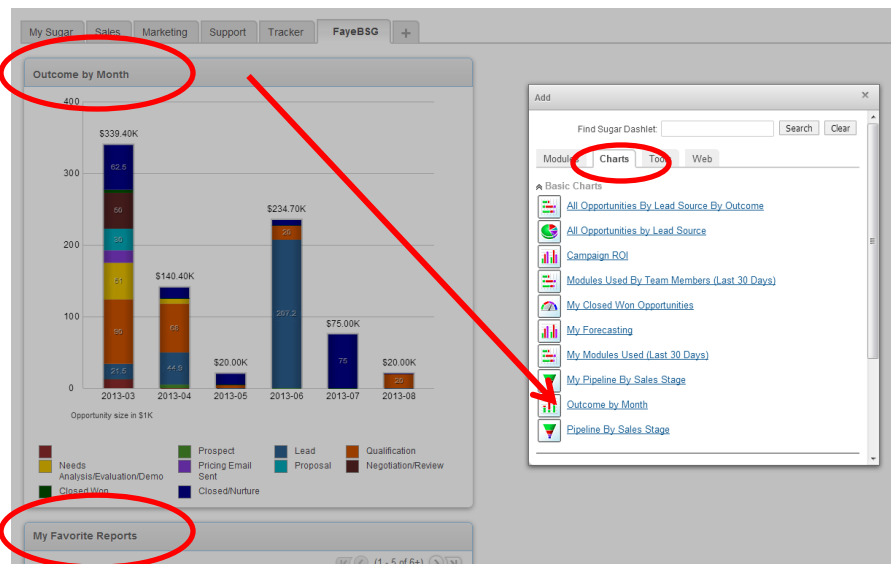
Add Find Sugar Dashlet Search Clear

**Modules** Charts Tools Web

Modules

- My Accounts
- My CC Sync Activities
- My CCI Activities
- My CCI Errors
- My Calls
- My Constant Contact Integration
- My Daily Tasks
- My EDI
- My Emails
- My Favorite Records
- My Assigned Bugs
- My CC Sync Table
- My CCI Activity Errors
- My Calendar
- My Closed Opportunities
- My Contacts
- My Documents
- My EDI Partners & Contacts
- My End User
- My Favorite Reports

From Modules – My Favorite Reports. Once I select it, it appears in my tab.



My Sugar Sales Marketing Support Tracker FayeBSG +

**Outcome by Month**

400

300

200

100

0

2013-03 2013-04 2013-05 2013-06 2013-07 2013-08

Opportunity size in \$1K

\$339.40K \$140.40K \$20.00K \$234.70K \$75.00K \$20.00K

Legend: Prospect, Pricing Email Sent, Lead, Proposal, Negotiation/Review, Needs Analysis/Evaluation/Demo, Closed Won, Closed/Nurture, Qualification

Add Find Sugar Dashlet Search Clear

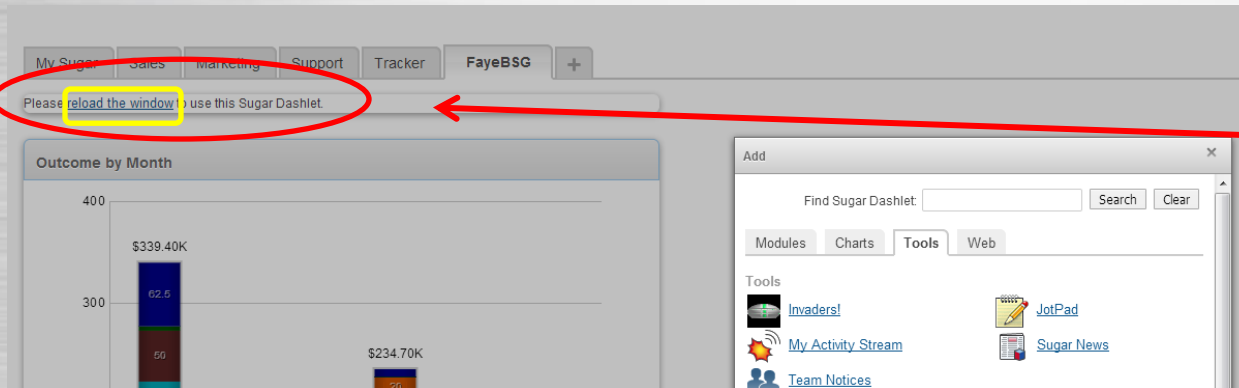
**Charts** Modules Tools Web

Basic Charts

- All Opportunities By Lead Source By Outcome
- All Opportunities by Lead Source
- Campaign ROI
- Modules Used By Team Members (Last 30 Days)
- My Closed Won Opportunities
- My Forecasting
- My Modules Used (Last 30 Days)
- My Pipeline By Sales Stage
- Outcome by Month
- Pipeline By Sales Stage

**My Favorite Reports** (1 - 5 of 6+)

From Charts - Outcome By Month. It will drop the dashlet in the top left, pushing the previous dashlet down the page.



My Sugar | Sales | Marketing | Support | Tracker | FayeBSG | +

Please **reload the window** to use this Sugar Dashlet.

Outcome by Month

Month	Value
Mar	\$339.40K
Apr	\$224.70K

Add

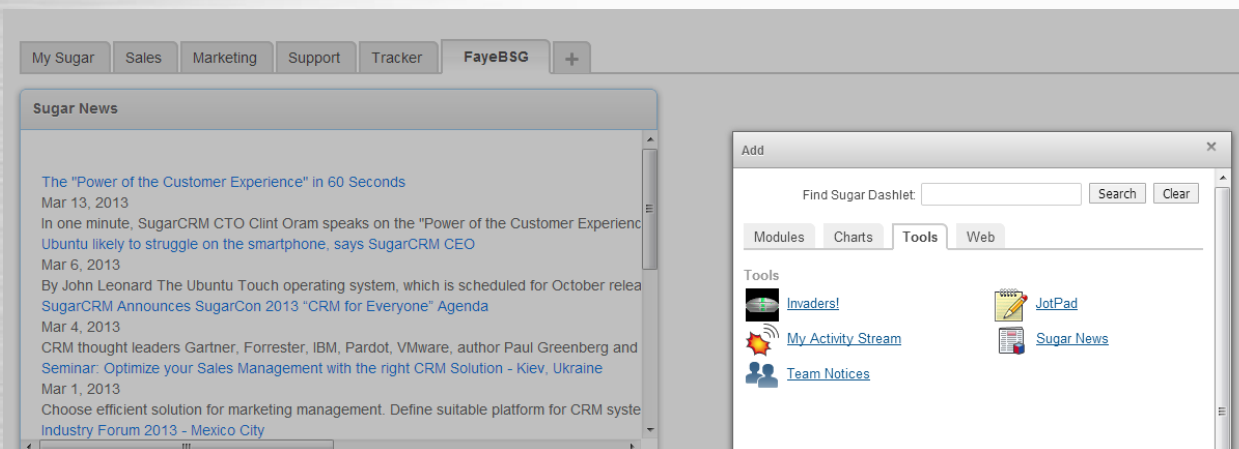
Find Sugar Dashlet:  Search Clear

Modules | Charts | Tools | Web

Tools

- Invaders!
- My Activity Stream
- Team Notices
- JotPad
- Sugar News

Some dashlets will require you to reload the window. You can do this by clicking on the reload link from the dashlet.



My Sugar | Sales | Marketing | Support | Tracker | FayeBSG | +

Sugar News

The "Power of the Customer Experience" in 60 Seconds  
Mar 13, 2013  
In one minute, SugarCRM CTO Clint Oram speaks on the "Power of the Customer Experience" at the Ubuntu Touch operating system, which is scheduled for October release.

SugarCRM Announces SugarCon 2013 "CRM for Everyone" Agenda  
Mar 6, 2013  
By John Leonard The Ubuntu Touch operating system, which is scheduled for October release.

CRM thought leaders Gartner, Forrester, IBM, Pardot, VMware, author Paul Greenberg and Seminar: Optimize your Sales Management with the right CRM Solution - Kiev, Ukraine  
Mar 4, 2013

Choose efficient solution for marketing management. Define suitable platform for CRM system  
Industry Forum 2013 - Mexico City  
Mar 1, 2013

Add

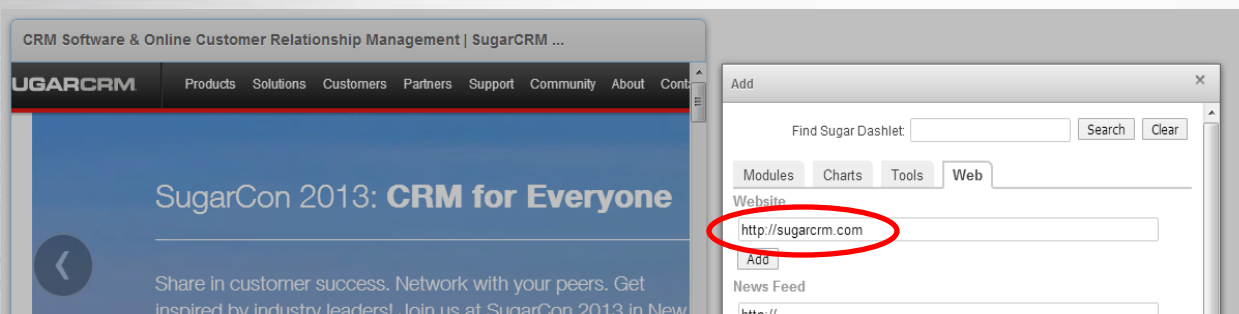
Find Sugar Dashlet:  Search Clear

Modules | Charts | Tools | Web

Tools

- Invaders!
- My Activity Stream
- Team Notices
- JotPad
- Sugar News

Sugar News can be added from the Tools tab.



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SugarCon 2013: CRM for Everyone

Share in customer success. Network with your peers. Get inspired by industry leaders! Join us at SugarCon 2013 in New Orleans.

Add

Find Sugar Dashlet:  Search Clear

Modules | Charts | Tools | Web

Website

Add

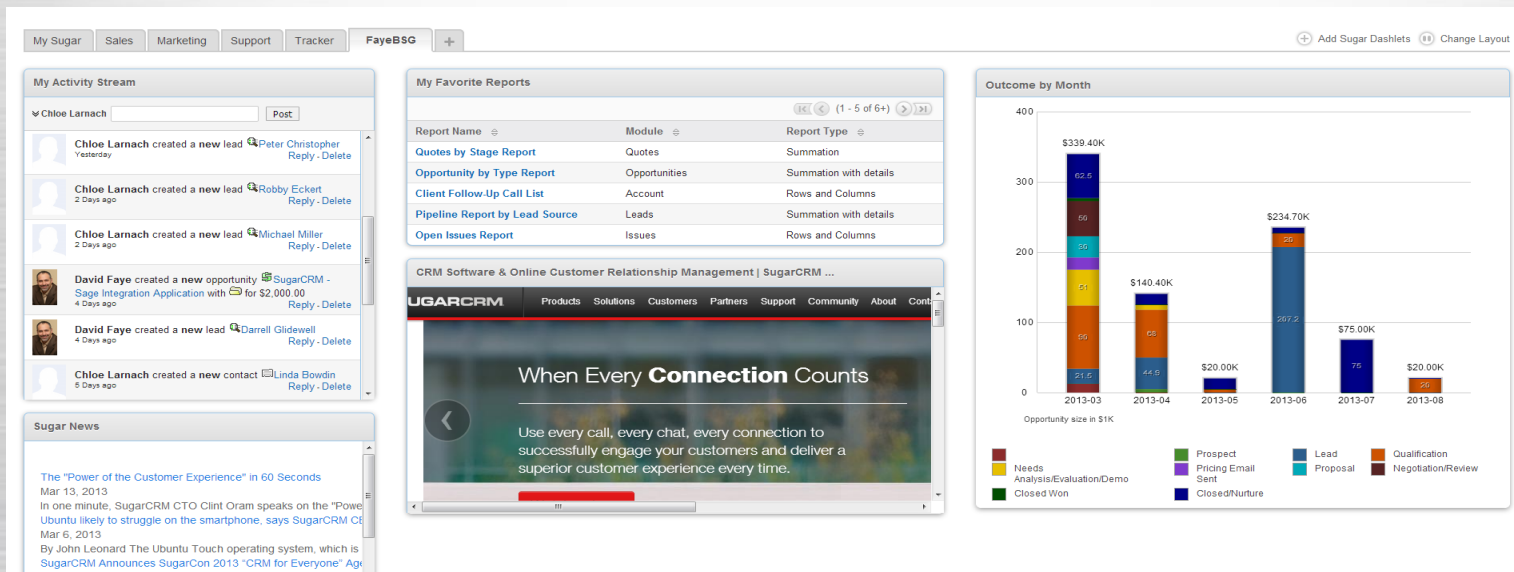
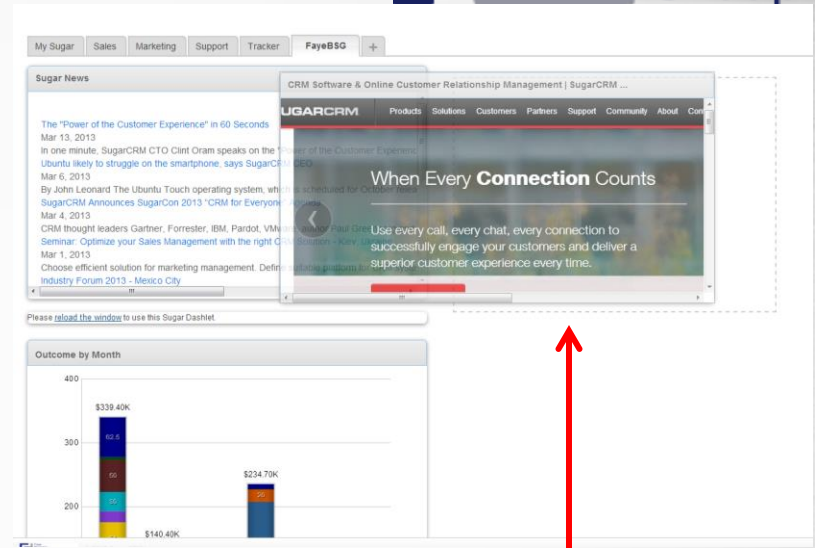
News Feed

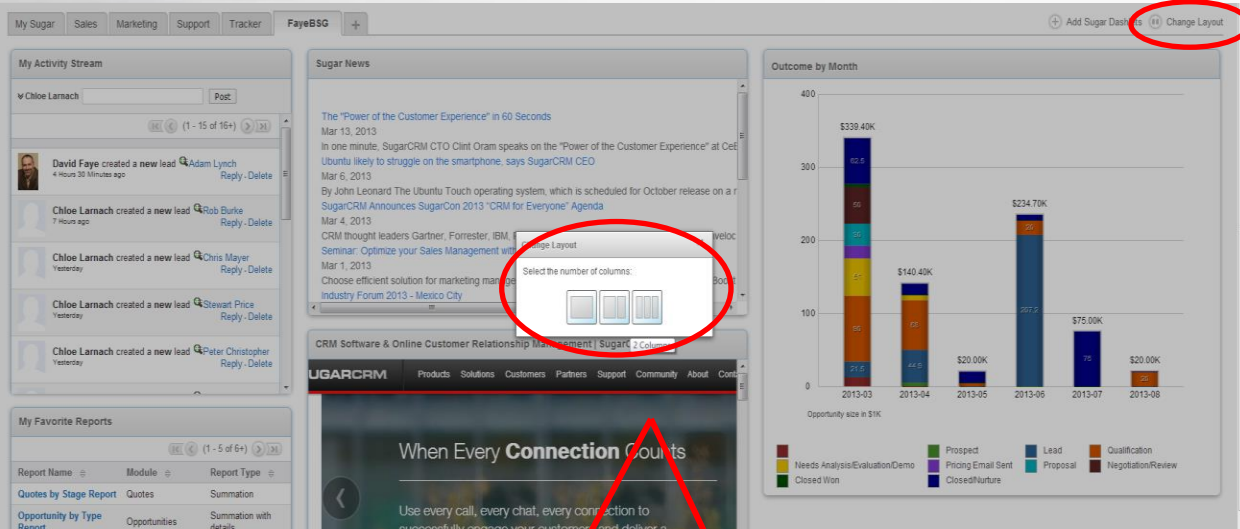
You have the ability to add your own or other websites.

All dashlets appear in one single line even though the number of columns pre selected was three.

We now have the ability to move the dashlet to the location that we wish within the three panels.

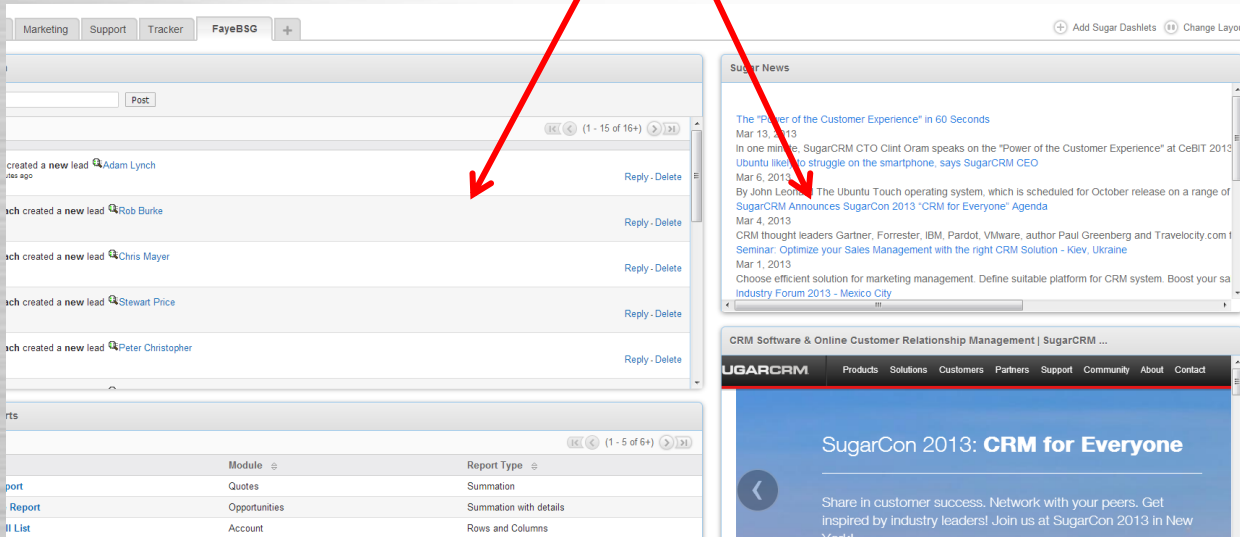
To rearrange simply click and drag each dashlet window in the desired location.



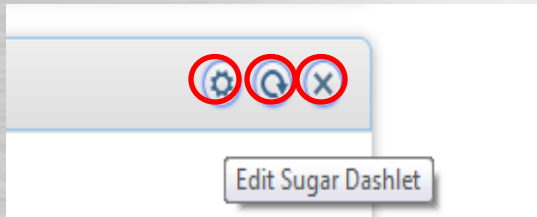


To change the column Layout, click change layout in the top right of your tab page.

Select the amount of columns desired.



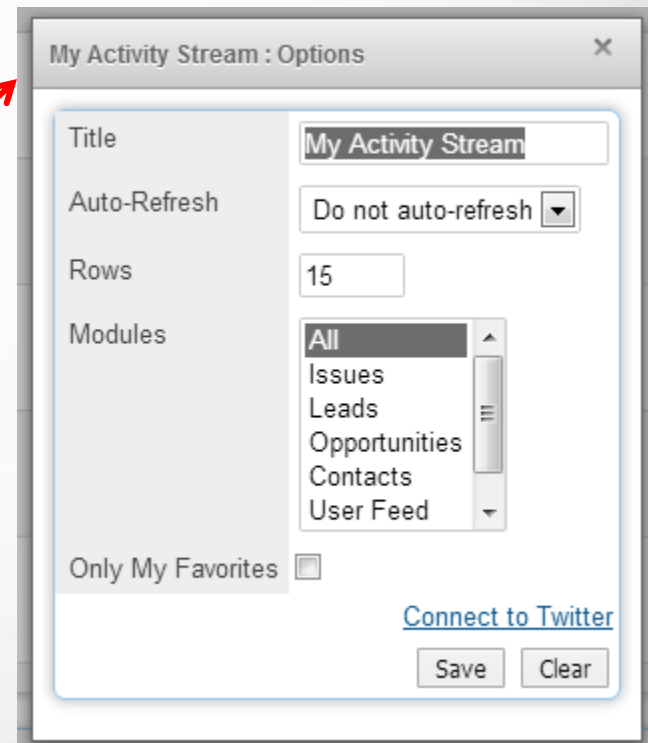
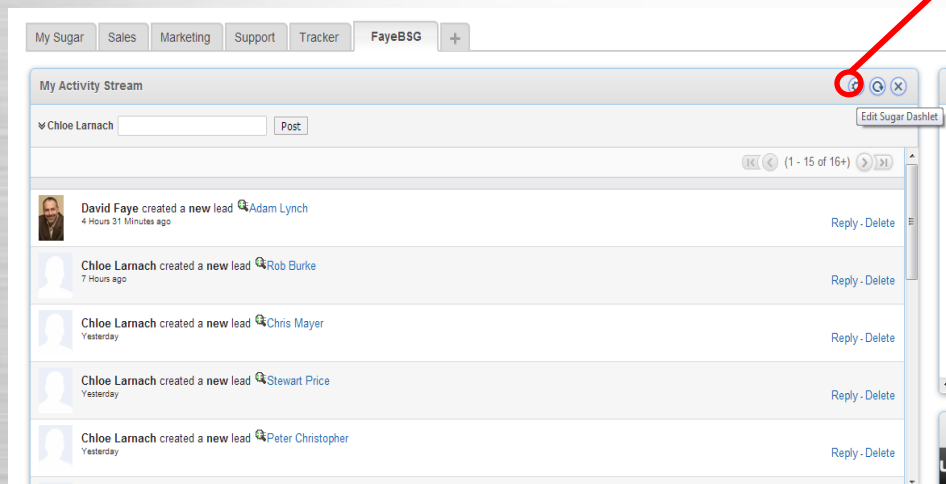
It will arrange your dashlets into the select amount of columns.



If you hover over the dashlet header two or three icons appear depending on the type of dashlet.

You can also edit, refresh and remove them, directly from the dashlet window.

Select Edit to open up the option box, where you can make adjustments depending on the module or activity you are editing.



Deleting a dashlet will not delete any data in sugar.



# **Faye Business Systems Group**

**1.818.227.5130**

[info@fayebsg.com](mailto:info@fayebsg.com)

[www.fayebsg.com](http://www.fayebsg.com)