Add+ Intelligence Reports Configuration Guide

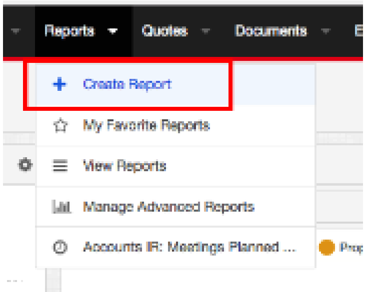
Overview

The Add+ Intelligence Reports Plugin completes Sugar's Intelligence Panel by making it possible to add dynamic reports to the Sugar Report Module.

This guide covers how to configure a report that takes advantage of the features in the Plugin.

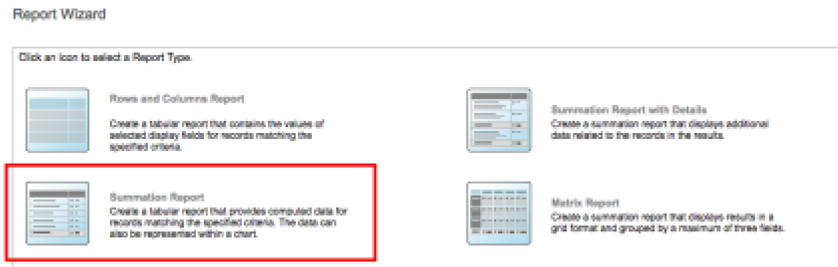
Create Report

Start with creating a new Report in the report module



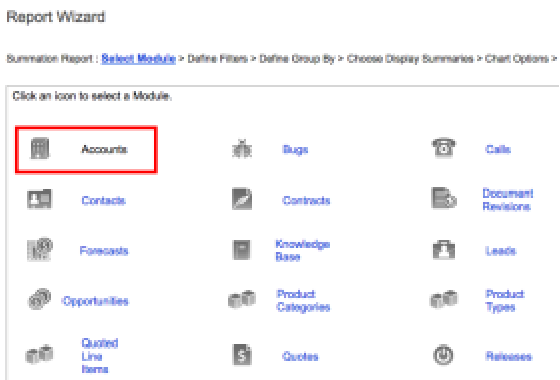
Select Report Type

Select Summation Report.



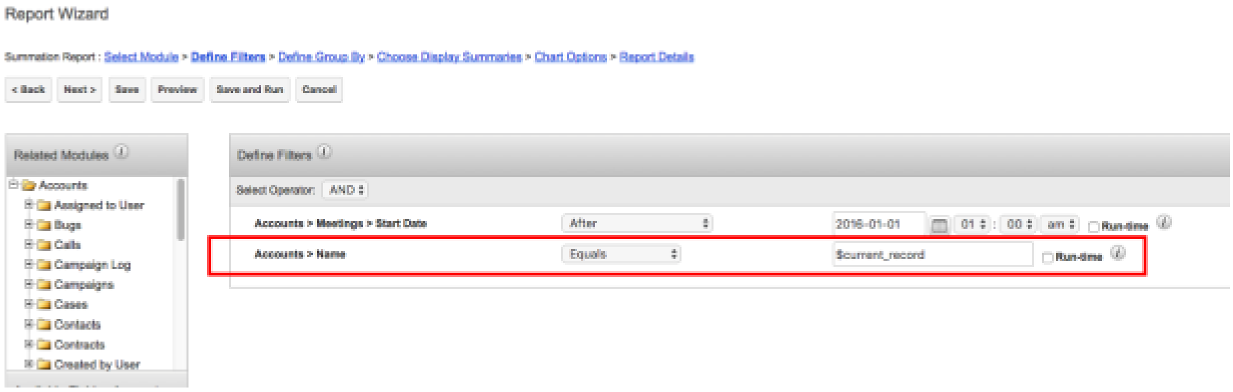
Select Module

In this guide we are going to create a report on Accounts as an example.



Define Filters

Add the Accounts -> Name, then select Equals and enter **"current_record".** This part is **very** important since this is how the report knows what to filter on.



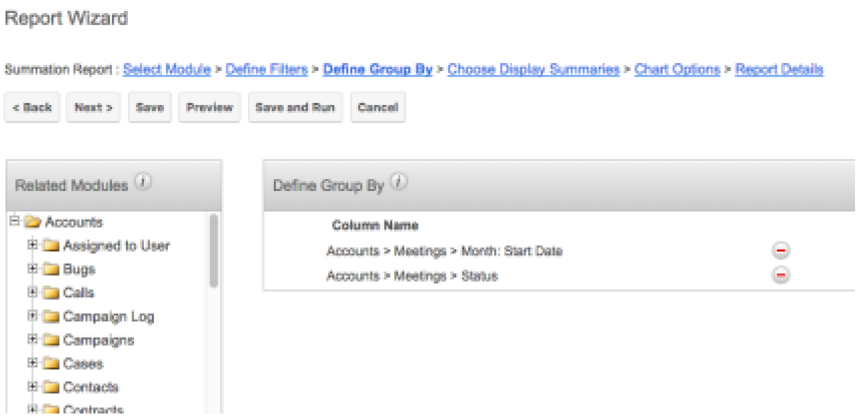
When later adding the report to the Intelligence Panel, the current filters in the list view or the current record ID in the record view will dynamically replace this filter.

The current record filter can be combined with any other filter that the Report Module supports. Multiple filter groups are also supported.

For more information on report filters, please refer to the [Report Filters] section of this documentation.

Define Group By

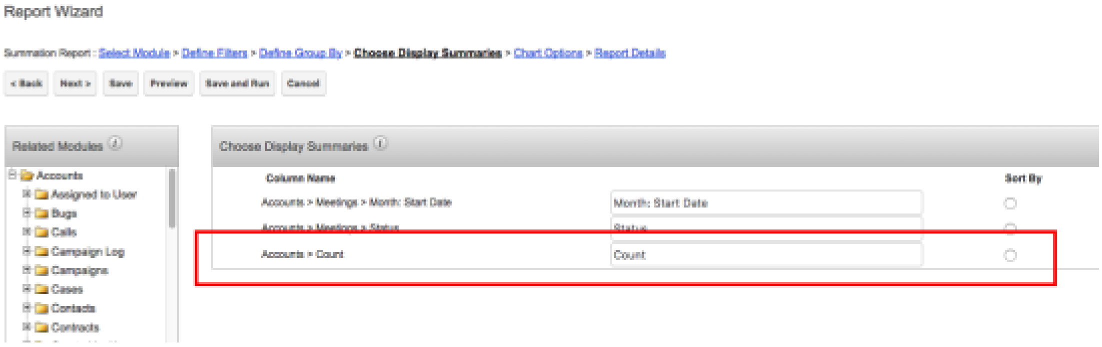
Add what the report should be grouping depending on how you want the report to visualize your data. In this example we are grouping on meeting monthly start date and status to get an overview of how many meetings we've had per month and what the status of the meeting is right now.



For more information about the Group By section of the reports module, please refer to the [Sugar documentation]

Define Display Summaries

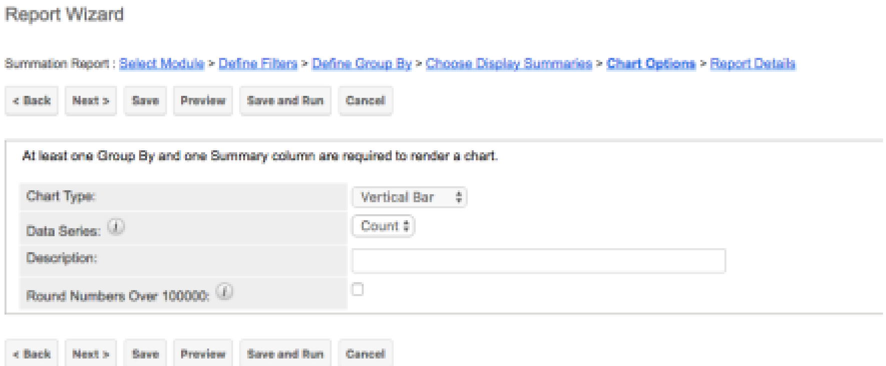
Add what the report should be summarizing. In this example we've chosen to display the number of meetings.



For more information about the Display Summaries section of the reports module, please refer to the [Sugar documentation]

Configure Chart Options

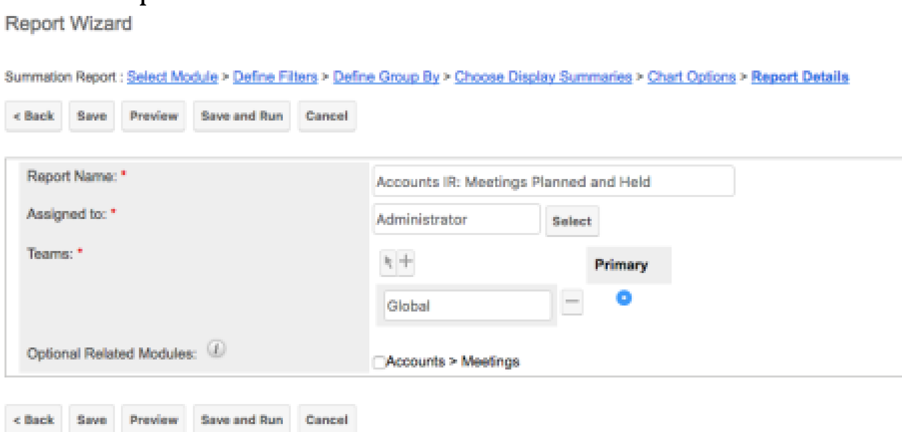
Select the Chart Type and Data Series.



For more information about the Chart Options section of the reports module, please refer to the [Sugar documentation]

Enter Report Details

Give the report a name and click on Save and Run.

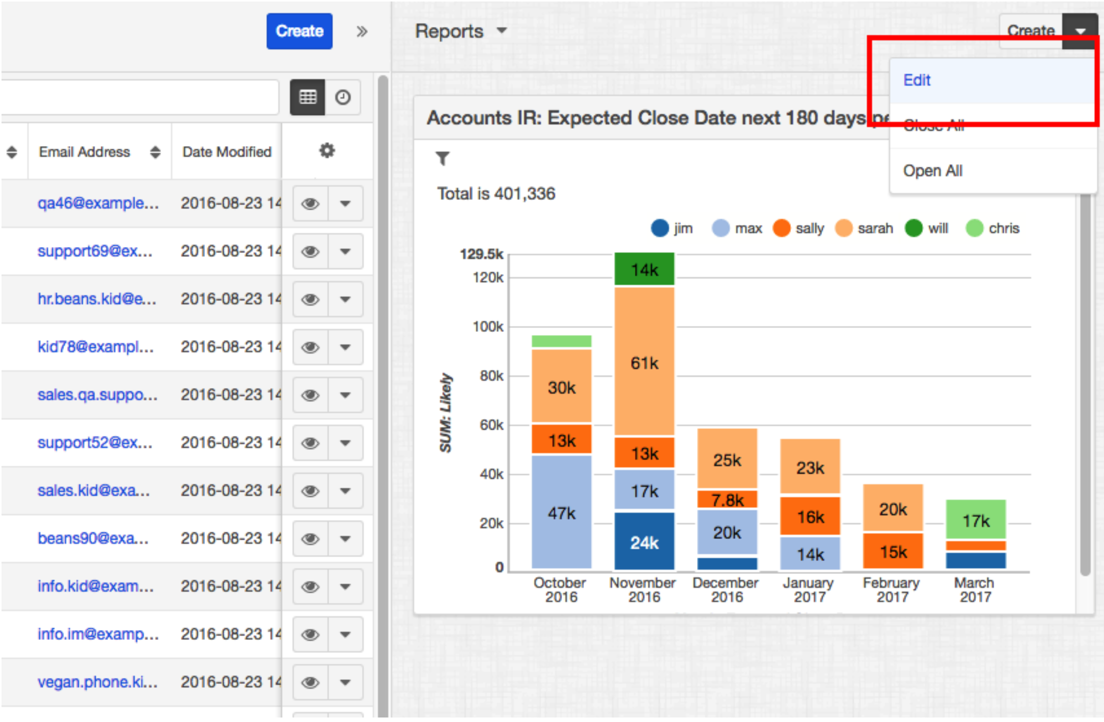


For more information about the Report Details section of the reports module, please refer to the [Sugar documentation]

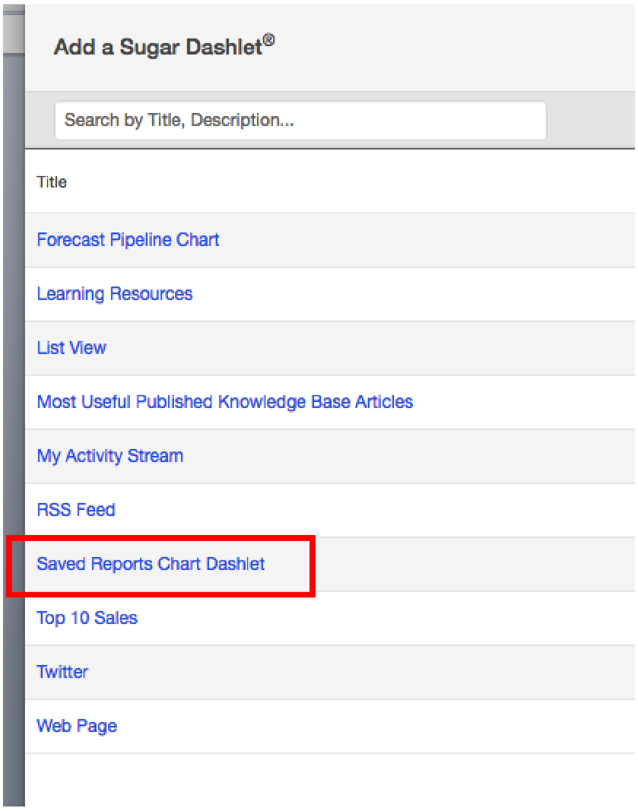
Add Report to the Intelligence Pane

Described below is the steps to add a dynamic Add+ Intelligence Report to the list view, please note that the steps are exactly the same in the record view.

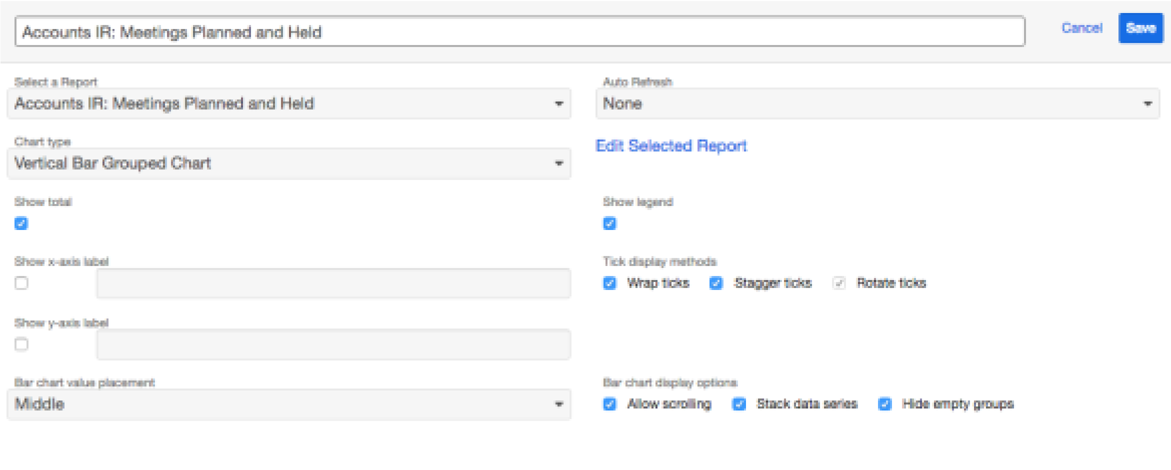
Start by edit an existing dashboard or create a new.



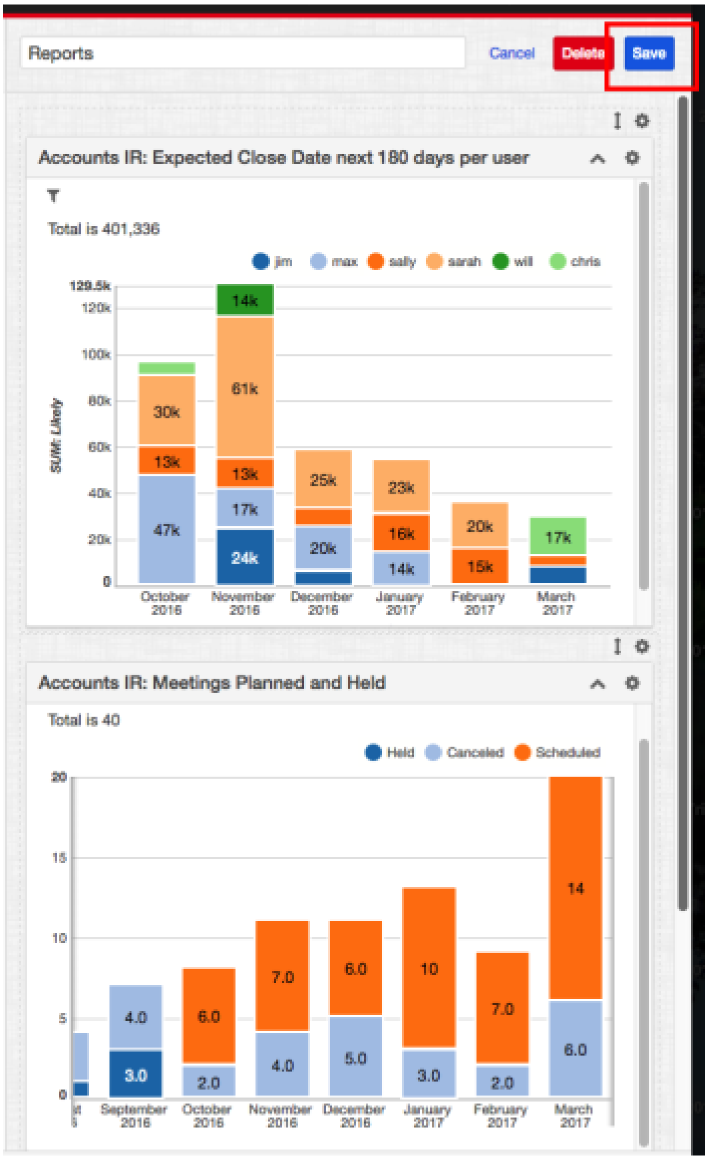
Click on Add Row then Add Sugar Dashlet® then select the "Saved Reports Chart Dashlet".



Select the Report that you have previous created and configure how you want the report to be visualized



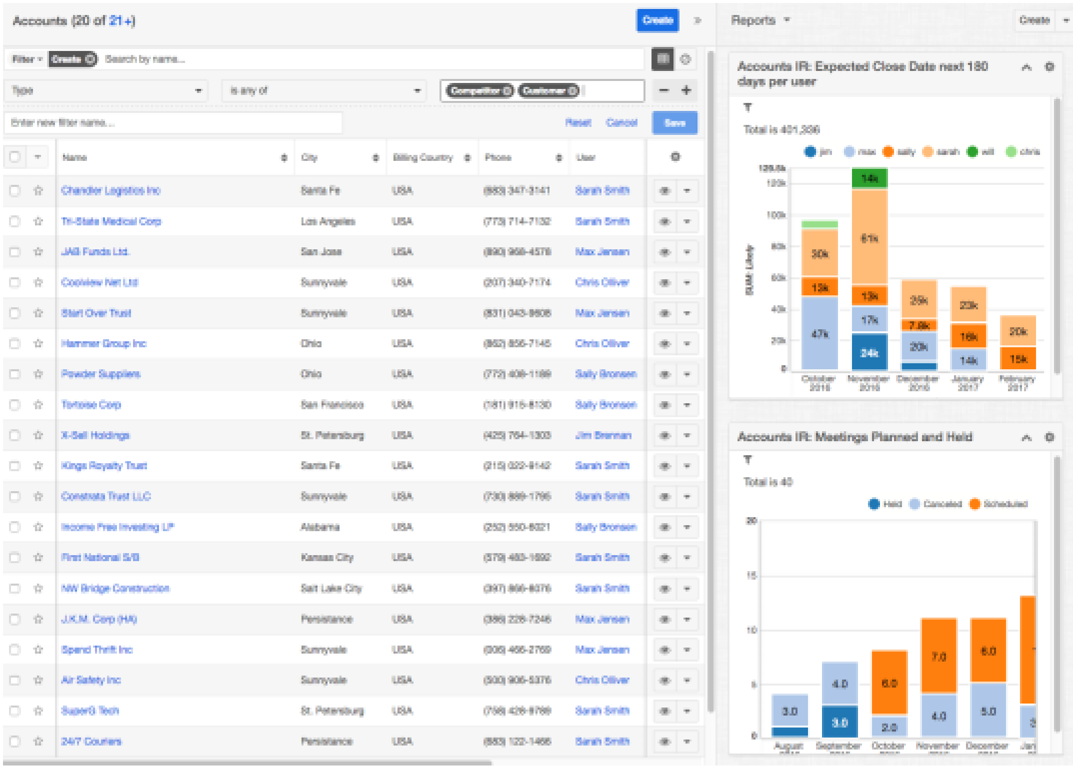
Remember to save the Dashboard.

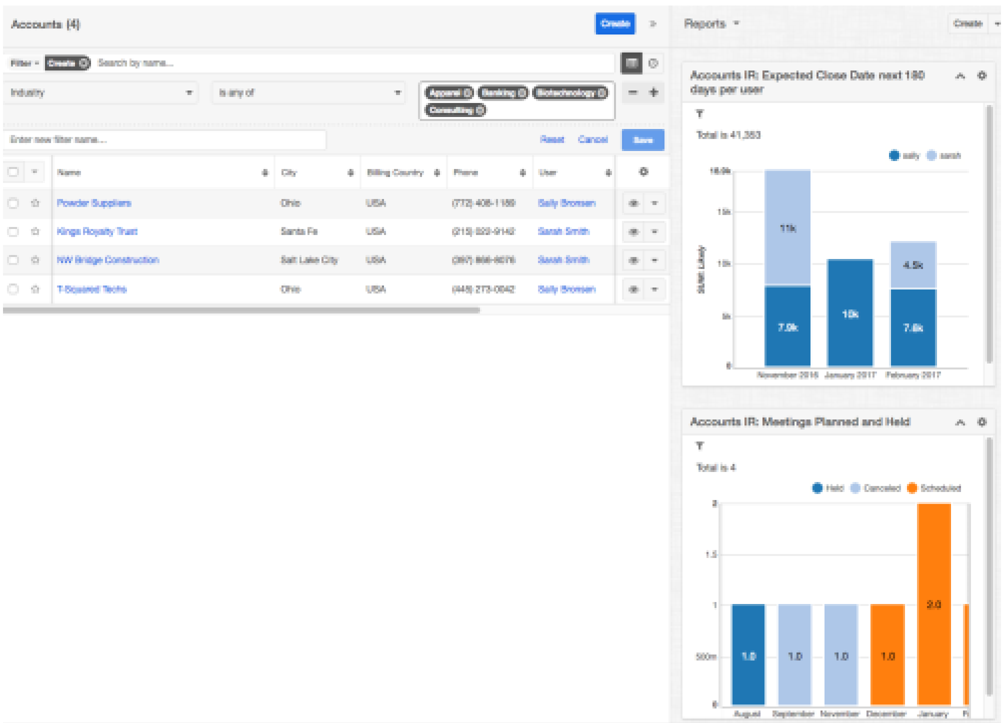


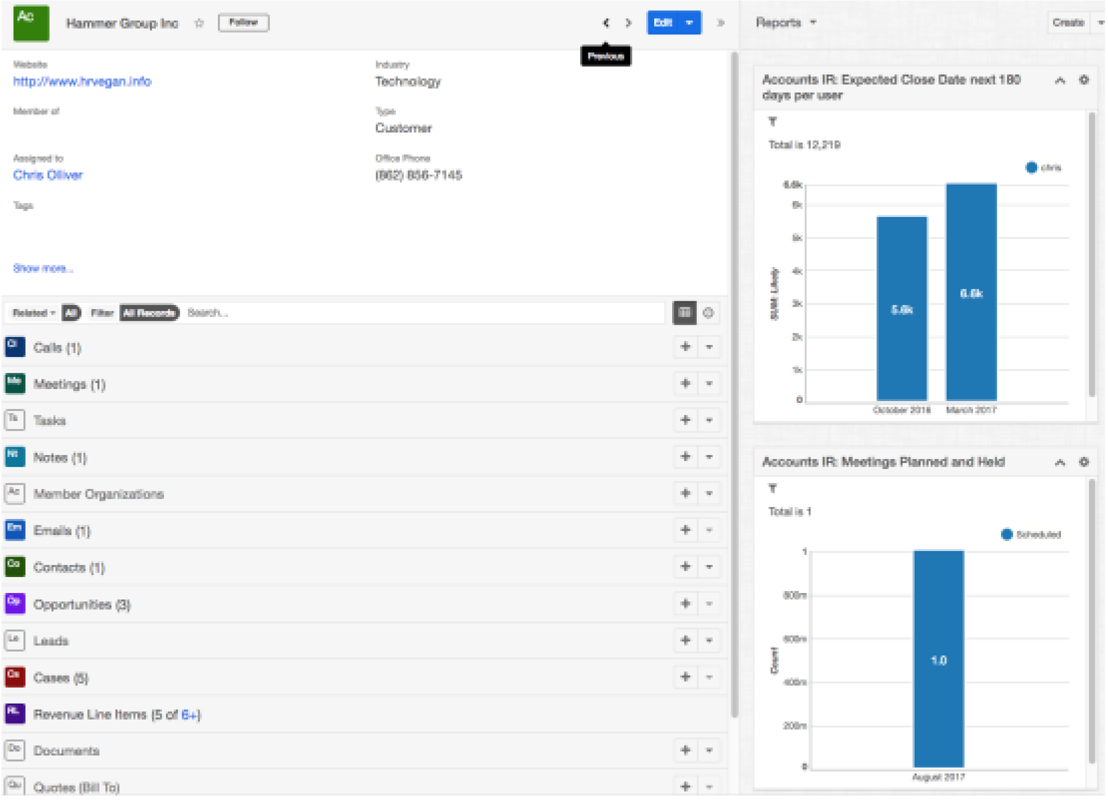
Finished! Now you can enjoy the Add+ Intelligence Reports Plugin!

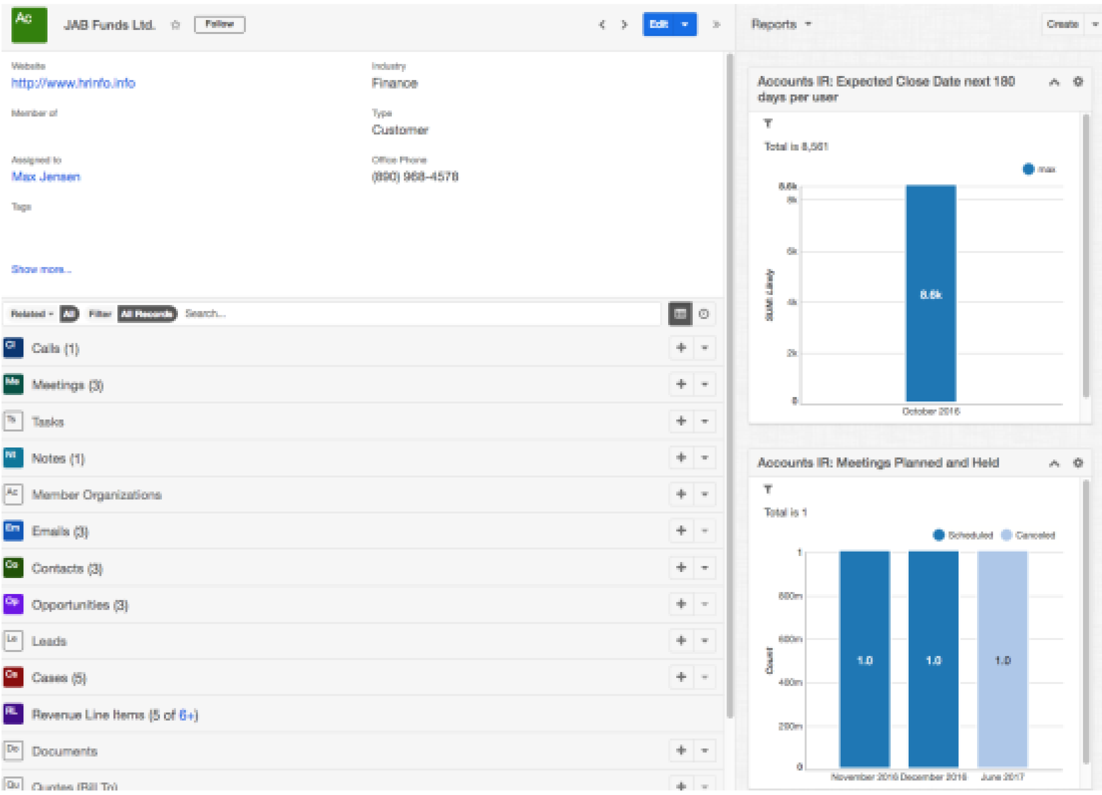
For more information on adding dashlets, please refer to the [Intelligence Pane] documentation.

Below are some examples in the list and record view of the report we just created and added to the Intelligence Pane.






Hammer Group Inc
Follow
Edit
Previous
Website
http://www.hrvegan.info
Industry
Technology
Member of
Type
Customer
Assigned to
Chris Olliver
Office Phone
(862) 856-7145
Tags
Show more...
Calls (1)
Meetings (1)
Tasks
Notes (1)
Member Organizations
Emails (1)
Contacts (1)
Opportunities (3)
Leads
Cases (5)
Revenue Line Items (5 of 6+)
Documents
Quotes (Bill To)
Reports
Create
Accounts IR: Expected Close Date next 180 days per user
Total is 12,219
5.6k
6.6k
October 2016
March 2017
Accounts IR: Meetings Planned and Held
Total is 1
Scheduled
1.0
August 2017


JAB Funds Ltd.
Follow
Edit
Website
http://www.hrinfo.info
Industry
Finance
Member of
Type
Customer
Assigned to
Max Jensen
Office Phone
(890) 968-4578
Tags
Show more...
Calls (1)
Meetings (3)
Tasks
Notes (1)
Member Organizations
Emails (3)
Contacts (3)
Opportunities (3)
Leads
Cases (5)
Revenue Line Items (5 of 6+)
Documents
Reports
Create
Accounts IR: Expected Close Date next 180 days per user
Total is 8,561
8.6k
October 2016
Accounts IR: Meetings Planned and Held
Total is 1
Scheduled
Canceled
1.0
1.0
1.0
June 2017