

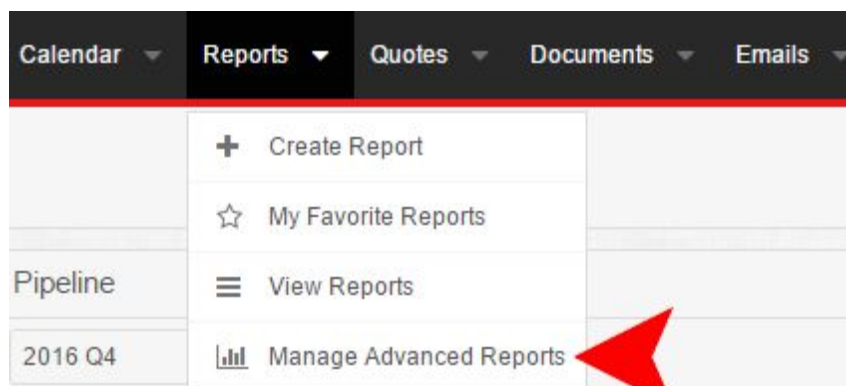
Google Sheets Business Intelligence Custom Queries Guide

Accessing Custom Queries Section

NOTE: Custom Queries are a part of the Advanced Reporting module, which is only available to users that have SugarCRM Enterprise or higher versions.

Step #1:

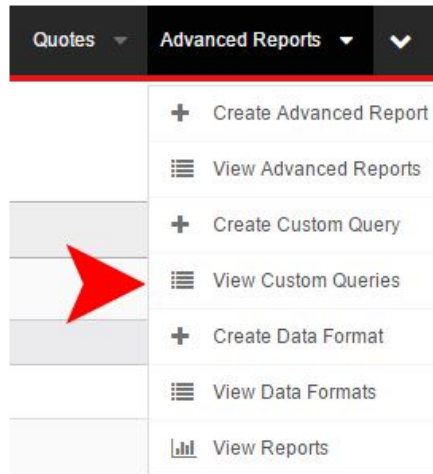
Click on the “Reports” tab, then select “Manage Advanced Reports” from the dropdown.



Step #2:

A new item called “Advanced Reports” will appear in the top navbar. Click this tab, then select “View Custom Queries.”

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Step #3:

You will be presented with a list of “Custom Queries.” From here you can run these existing queries, rename queries, and create new custom queries.

Query Name ↕	Description	Valid Query?		
Opportunity Query 1	Opportunities by Type	Valid	remove	Run Query
Opportunity Query 2	Opportunities by Account	Valid	remove	Run Query

Renaming Existing Queries

Step #1:

Select a “Custom Query” from the list of available queries by clicking on its name.

Query Name ↕	Description	Valid Query?		
Opportunity Query 1	Opportunities by Type	Valid	remove	Run Query
Opportunity Query 2	Opportunities by Account	Valid	remove	Run Query

Step #2:

For these reports to export correctly from SugarCRM, they require a special naming convention. This is accomplished by adding the prefix "EXR2GD" to the report title.

For example, if you have report with name “Opportunity Query 1,” it will need to be renamed “EXR2GD Opportunity Query 1” for the plugin to properly export it.

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Custom Query: Opportunity Query 1

Save

Query Name: * Opportunity Query 1

Lock Query:

It should look like the image below. Click "Save" to keep the changes.

Save

Query Name: * EXR2GD Opportunity Query 1

Creating Custom Queries

Step #1:

Follow steps 1 and 2 from “Accessing Custom Queries Section.”

Step #2:

Click on “Create.”

Create

Delete

(1 - 2 of 2)

Query Name	Description	Valid Query?		
Opportunity Query 1	Opportunities by Type	Valid	remove	Run Query
Opportunity Query 2	Opportunities by Account	Valid	remove	Run Query

Step #3:

Enter query name in a format EXR2GD {query name}. Then select the team (or teams) that will have access to the custom query. Then add a brief description for the query, and the custom query code (either MySql or MSSql). After you have entered this data and checked it, click “Save.”

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Save

Query Name: *

Lock Query:

Team: Primary

Description:

Custom Query:

That's all there is to it! Simply wait for the next export task to run, and your new queries will appear in the Google Drive folder titled "SugarCRM_Reports."