HOW WE CREATED A MULTI-TAB CUSTOM QUERY DASHLET WITH RECORD SUMMARY FOR SUGARCRM

This Case Study details the construction of a Sugar Dashboard, comprising diverse Dashlets that enable users to access specific data, insights, and valuable visualizations.

KEY METRIC

The purpose of a CRM is better data visibility and segregation, which was made easier with this customization.

More control over data views customization

SUMMARY

SugarCRM serves as an effective tool for streamlining business processes and automating workflows. Users can create dynamic dashboards tailored to their Information management and Business Intelligence preferences.

A Sugar Dashboard consists of Dashlets, allowing users to access specific data, insights, and visualizations. Among these, the ListView dashlet is commonly used to retrieve records from a specific module. Recognizing the need for users to quickly access records from multiple sources, Nablasol developed a Custom Query Dashlet. This dynamic feature aggregates data from various modules into a single list, offering a record summary preview before users decide to open the lead.

BUSINESS CHALLENGES

While SugarCRM's default List View dashlet efficiently displays data from a single module, numerous scenarios require data retrieval from multiple modules. Although a Report Chart dashlet is available, it primarily generates graphical reports and cannot present columns from various modules within a single list.

To address these issues, organizations often construct custom query Dashboards for multi-module data presentation. However, this approach poses its own set of challenges:

- Dependency on developers for dashlet additions or modifications, resulting in extended turnaround times.
- Management of a multitude of Custom Dashlets, leading to clutter and organizational difficulties within the dashlet list.
- Repetitive creation of similar dashlets due to the limitations in making on-the-fly changes to inflexible custom dashlets.

**A better organised
data view**

Added on features

**More control over data
views customization**

SOLUTION PROVIDED

We examined the challenges faced by these organizations in managing their team workflows and developed a Custom Query Dashlet to provide users with dynamic functionality. Here are some of the key features we incorporated into the dashlet:

- **Tab View organization:** Allows for the creation of multiple tabs within a dashlet, enabling easy access to all available data in a single view.
- **Tab categorization:** Tabs can be grouped into multiple categories, enhancing organization and accessibility.
- **Tab creation:** Users can add new tabs by creating records within the Custom Dashlet module and defining the SQL query.
- **Filters and restrictions:** Users can apply specific filters, including user, role, and team restrictions, to each tab within the dashlet.
- **Color-coded data:** Data within the dashlet can be color-coded based on record-specific color codes included in the SQL query.
- **Record previews:** Users can preview related notes, calls, and appointments before deciding to open the record.
- **Note and appointment creation:** Users can add notes and schedule appointments directly from the dashlet without the need to access the actual record.

IMPACT ON BUSINESS

The introduction of this dashlet significantly streamlined workflow processes while enhancing the overall user experience. Key advantages of this dashlet encompassed:

- Expedited dashlet development and modification for data extraction from multiple SugarCRM modules.
- User-friendly features such as data color-coding and tab organization, simplifying data access and recognition through visual cues.
- Enhanced user productivity through the ability to preview pertinent record data without the necessity of opening them.

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