



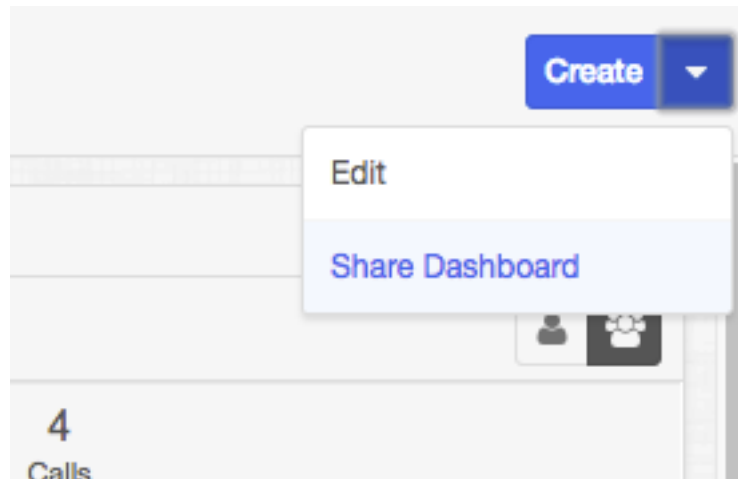
Dashboard Share

Overview

- Download the latest .tgz package here: <https://github.com/sugarcrlabs/DashboardShare/releases/latest>
- Load the package in your target instance using Module Loader
- Navigate to the desired Dashboard
- In the Edit dropdown you will see a new entry for "Share"
- You can select any user, team, or group to send the filter to
- The target user(s) will receive an email allowing them to approve or reject the new dashboard

Share Dashboard

Create or Edit a dashboard. In the action menu there is a button labeled 'Share'.



Select Share Targets

Select which Team, Group, and/or User(s) to share the filter with. The user can also define if they want to allow the target user(s) to be able to edit the dashboard or not.

Share Your "My Activities" Dashboard

Allow changes for this dashboard ☐

Roles

Teams

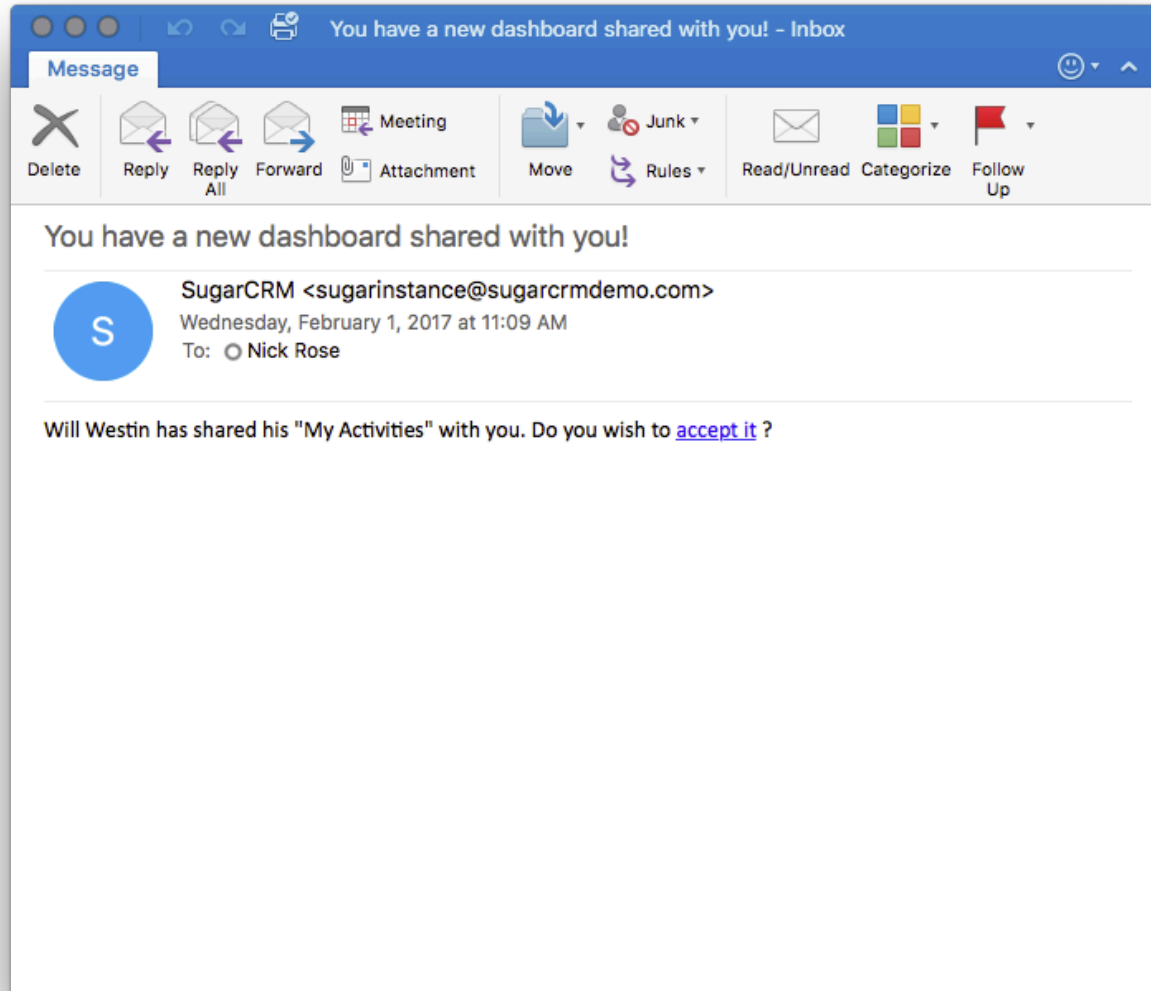
Users

☐ All

- ☐ Email Archiving user
- ☐ Sugar Customer Support Portal
- ☐ admin Administrator
- ☐ Charles James
- ☐ Chris Olliver
- ☒ Genie O'Grady
- ☐ Jane Fitzpatrick
- ☐ Jim Brennan
- ☐ Max Jensen
- ☐ Regina Lazlow
- ☐ Sally Bronsen
- ☐ Sarah Smith
- ☐ Will Westin

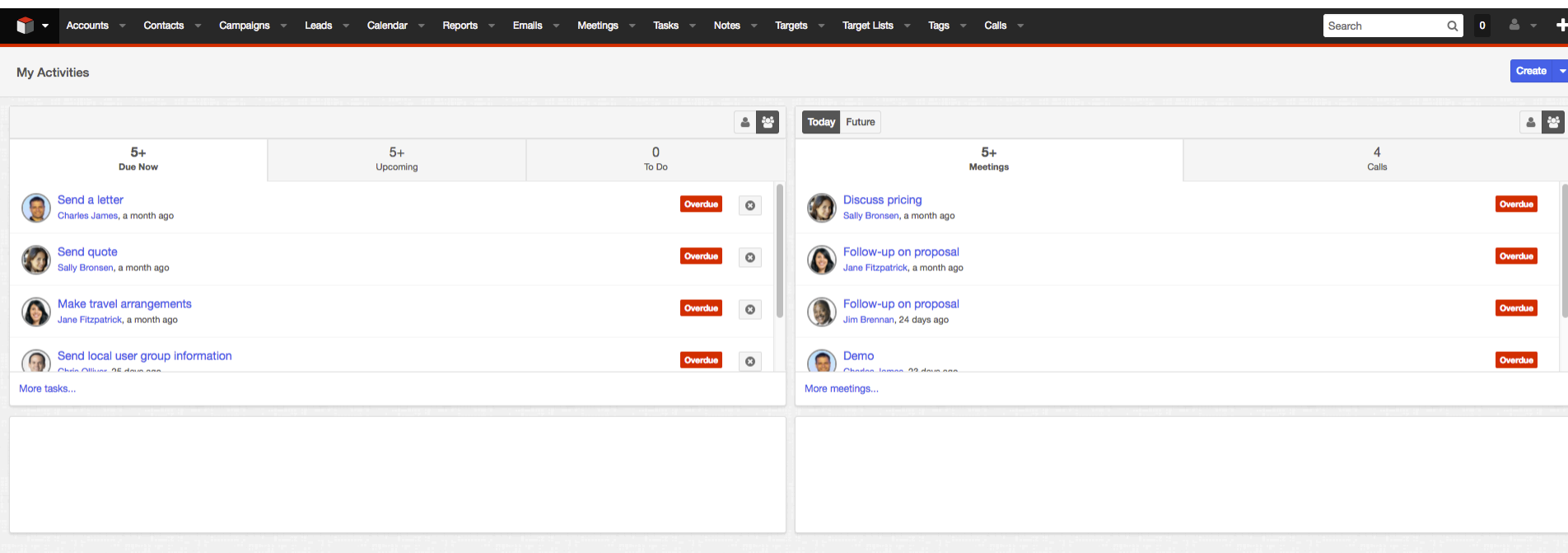
Approval Email

Target User(s) will receive an email where they must approve the incoming dashboard. This helps limit spamming of dashboards.



Shared Dashboard

Target User(s) will then have that dashboard available to them.



The screenshot displays the SugarCRM Shared Dashboard interface. At the top, a navigation bar includes various modules: Accounts, Contacts, Campaigns, Leads, Calendar, Reports, Emails, Meetings, Tasks, Notes, Targets, Target Lists, Tags, and Calls. A search bar and a user profile icon are also present. Below the navigation bar, the 'My Activities' section is visible, featuring a 'Create' button. The main content area is divided into two columns. The left column shows a list of tasks with a 'Due Now' filter, including items like 'Send a letter' by Charles James, 'Send quote' by Sally Bronsen, 'Make travel arrangements' by Jane Fitzpatrick, and 'Send local user group information' by Chad Oliver. The right column shows a list of meetings with a '5+ Meetings' filter, including items like 'Discuss pricing' by Sally Bronsen, 'Follow-up on proposal' by Jane Fitzpatrick, 'Follow-up on proposal' by Jim Brennan, and 'Demo' by Chad Oliver. Both columns have 'Overdue' buttons and a 'More tasks...' or 'More meetings...' link at the bottom.