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# **Sugar Enterprise 12.0 (Q2 2022) Release Notes**

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# Sugar Enterprise 12.0 (Q2 2022) Release Notes

## Overview

This document describes the changes and functionality available in Sugar® Enterprise 12.0.0 (Q2 2022). While version 12.0 is available for both SugarCloud and on-site deployments, Sugar Enterprise is supported as an on-site deployment only.

For information about any changes to existing functionality in this release, you can also refer to the [What to Expect When Upgrading to 12.0](#) article.

## Feature Enhancements When Upgrading From 11.0.x (Q2 2021)

The following feature enhancements are new in Sugar Enterprise On-Site 12.0.0 (Q2 2022) when upgrading from the 11.0.x (Q2 2021) release:

### 11.0 Enterprise On-Site to 12.0 Enterprise On-Site

#### [Integration Enhancements](#)

- **Improved [Sugar Market](#) and Sugar Enterprise Integration**
  - **Sugar Market fields added to Leads and Contacts:** "Lead Score" and "Interest Prediction Score" have been added to lead and contact records. Customers with an integrated Sugar Market instance can sync these field values from Market to their CRM via the Market-side sync settings.
  - **[Timeline integration for Sugar Market](#):** A unified view of Sugar Market and Sugar Enterprise touchpoints can now be seen in the Timeline dashlet on Account, Lead, and Contact record views. The lead and contact interactions captured through Sugar Market are integrated into the Timeline via Sugar Market sync, providing CRM users visibility into the customers' entire journey and eliminating the manual work of piecing these activities together.
  - **[Smarter lead-conversion handling of Sugar Market activities](#):**

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Sugar customers who are integrated with Sugar Market can set the "Lead Conversion Option" to "Move" in Sugar's System Settings to move related Event, Landing Page, and Web Activity records to the converted contact record along with the lead's related CRM activity records.

- **Sugar Hint built into Sugar:** Customers who use Sugar Hint will no longer need to maintain a module loadable package because the functionality has been built into Sugar's code base and can be enabled via license key.
- [Improved Sugar Hint data in APAC](#): If your instance is hosted in the Asia/Pacific region, your service will connect with data provider services located in that region for more accurate data results.
- [Third-party cloud-drive integrations](#): The new Cloud Drive dashlet lets you access and interact with your Google Drive or Microsoft SharePoint and OneDrive files from any dashboard in Sugar.
- [DocuSign integration](#): Users with a paid account for DocuSign can use the integration to send documents from Sugar to DocuSign for electronic signatures.

## [Look and Feel Enhancements](#)

- **New SugarCRM branding and icons:** The Sugar UI has been updated to reflect the SugarCRM brand with an updated Sugar logo and modernized icons (e.g., preview, import, create) throughout the application.
- **Updated user interface:** We have revamped Sugar for a more modern look and feel! The improvements include a sharper font and updates to UI elements in dashboards, dashlets, list views, record views, and more.
- [Light and dark theme options \(Dark Mode\)](#): Individual users can now opt to view Sugar in dark mode via their user preferences. Administrators should upload a secondary logo to be shown in the dark mode theme via Admin > System Settings.
- [New chart graphics](#): Graphic charts for reports and dashlets are now rendered by a new library for data visualization. Enjoy a more robust color palette, faster loading speeds, slick animations, and two new dynamic chart types: Donut and Area Treemap.

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- [Double-click to edit in list views](#): When viewing records in module list view, in subpanels, and after [drilling through report charts](#), you can now double-click on a row to edit a record.
  - [Send scheduled reports as CSV](#): As an alternative to PDF, you can now schedule a report to be sent as a CSV file - or as both a PDF and a CSV - by changing the File Type(s) field on the Report Schedules record view.
  - **List View updates**
    - [Pagination](#): Most lists in Sugar (e.g., list views, subpanels) are now broken up into pages instead of one large list of records to make navigating the results and getting the record count easier.
    - [Frozen header row](#): The header row on most list views will remain visible when scrolling down a long list of records.
    - [Frozen first column](#): The first column of most list views can now be frozen so that it remains visible when scrolling horizontally to view more columns.
    - [Collapsible filter panel](#): You can now minimize in-progress filters (i.e., unsaved filters or saved filters that have been edited) on list views to increase the screen space available below for returned list results.
    - [Flex relate type shown in list view](#): Flex relate fields (e.g., the Related To field on calls and meetings) now show the module icon of the related module in list views and List View dashlets so you can see at a glance what type of record it is.
    - **Persistent list view column order and subpanel layout**: [Subpanel ordering](#) as well as [list view](#) and [Historical Summary](#) column arrangement and settings are now stored in the database for each user so that they persist even after your browser's cache is cleared or you log in from a different device.
  - [Record View dashlet updates](#)
    - **Convert leads**: Users can now convert a lead from the Leads Record View dashlet.
    - **Switch to full record view**: Users can now navigate to the full-page record view by clicking the arrow icon that appears when hovering over the record's name.
    - **Edit a record's name**: Users can now edit the record's name directly from the Record View dashlet.
  - [Documents module converted to Sidecar](#): The Documents module has been converted from the legacy user interface to the Sidecar user interface.
  - **"Loading" alert can be dismissed**: There is now an "X" you can click on "Loading..." pop-ups to remove persistent alert boxes.
  - **Dropdown display labels included in exports**: Data exported from modules with dropdown and multiselect fields will now include columns for the display labels in the .csv export file.
  - **Custom currency fields display preferred currency**: Custom currency fields will now display your preferred currency if the "Show Preferred Currency" setting is enabled in your user profile.

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- [Enhanced accessibility](#): Sugar has improved the accessibility experience when using screen readers, text-to-speech, and keyboard navigation.
  - [Sugar product and version information in Help pane](#): Users can now quickly find their Sugar instance's version and their assigned CRM product licenses (e.g., Sugar Sell Advanced or Sugar Serve) via the Help link in the footer.

## [Activity Enhancements](#)

- [Timeline](#): The Timeline dashlet shows a filterable, chronological list of a record's related activities along with selected updates made to the current record. Context-aware actions can also be accessed directly within the dashlet, such as replying to or forwarding an email, unlinking activities, and drilling down via Focus drawers.
- [New calendar experience](#): The Calendar module has been converted from the legacy user interface to the Sidecar interface and offers more robust calendaring options.
  - Create calendars that show events from almost any module that has date or datetime fields and then overlay those calendars in a single view.
  - Define unique colors for different types of calendar events.
  - Create new records from the calendar for any module that has a configured calendar – not just activities.
  - View shared calendars in day/week/month views and overlay each person's events instead of viewing them side-by-side as was required in legacy calendar.
  - Export any calendar view as a PDF or iCal.
  - Jump right to the event's full record view by double-clicking on a calendar event if you have configured the calendar to do so.
  - Leverage filters for your displayed calendar events so that, for example, you can see all of the open opportunities for your team by their expected close dates.
  - Configure calendar event tiles and on-hover tooltips to show the fields and info you prefer on a per-calendar and per-view basis.
- [Calendar Scheduler dashlet](#): The new dashlet can be configured to display

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your preferred calendars on dashboards throughout Sugar.

- **Multi-select attachments using the Ctrl or Shift key:** You can upload multiple attachments at once to [case](#), [email](#), [knowledge base article](#), or [note](#) records by holding the Ctrl key or the Shift key while selecting the attachments.
- **Default "from" email accounts:** You can now mark your preferred email account as a favorite to make it the default sending account for your emails.
- **Preferred "from" email accounts:** You can now choose which of your email accounts to prioritize in the "From" email dropdown.
- **Embedding images in emails:** Users can now copy and paste the image data or drag and drop the image directly into the body of emails in the email composer.
- **Improved usability for [calls](#) and [meetings](#):** A new field, "Internal Notes", has been added to the record view for calls and meetings. Internal Notes are only visible to internal Sugar users. The Description field has been renamed "Invitation Body" to clarify that its contents are visible to all internal and external invited guests.

## [Administration Enhancements](#)

- **Re-designed Admin page:** To match Sugar's updated look, the Admin page's user interface has been refreshed to give it a clean style, new icons, and easier navigation.
- **Admin page search:** A search bar has been added to the top of the Admin page so you can quickly find utilities (e.g., System Email Settings, Studio) by searching for keywords.
- **Copy user preferences, dashboards, and filters to other users:** Admins can save time setting up new users, teams, and roles by broadcasting the setup of an existing user.
- **Added CSP directives:** The Content Security Policy Settings page has been expanded to include additional basic (e.g., 'frame-ancestors') and advanced (e.g., 'frame-src', 'script-src') CSP directives.
- **Action Buttons:** Admins can now add custom buttons to records so that users can perform quick actions like sending an email, creating or editing a

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related record, or opening an external web page right from a given record view layout. Implemented through a new field type in Studio (ActionButton) and configurable with Sugar Logic, Action Buttons will save users time and clicks by serving up common actions right where they need them.

- [\*\*More Studio options for relationship-based relate fields\*\*](#): The following settings have been made available for relationship-based relate fields in Studio: Mass Update, Dependent, Required Field, Allow Imports, and Duplicate Merge.
- [\*\*User-aware Sugar Logic function\*\*](#): A new Sugar Logic function, `currentUserField`, can evaluate fields in the Users module to drive field visibility, writability, or value according to the person currently viewing or editing a record.
- [\*\*Sales-focused Sugar Logic function\*\*](#): `forecastOnlySalesStages` exclusively returns the values of included sales stages for the Forecast module from the Sales Stage dropdown list (`sales_stage_dom`).
- [\*\*Easier translation of field labels in Studio\*\*](#): When setting localized-language labels in Studio, administrators will now be able to see the display label in their preferred language, too, to facilitate the translation process.
- [\*\*Dropdown Editor comparison language\*\*](#): When editing dropdowns in Admin > Studio > Dropdown Editor, you can now see the labels in a comparison language to quickly identify labels that are not translated or not translated correctly.
- [\*\*Dropdown-conditional record view layouts\*\*](#): Administrators can now define record view layouts that will change based on the value selected from a given dropdown field on the record.
- [\*\*More support for dropdown-conditional and role-based layouts\*\*](#): The Record View Dashlet and Preview View layouts now support dropdown-conditional and role-based layout definitions.
- [\*\*Improved Module Loader error handling\*\*](#): If you install a package that causes the Sugar instance to become unusable, the package installation is automatically rolled back.

## [SugarBPM Enhancements](#)



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- [Trigger on relationship changes](#): Start and Receive Message events can now be influenced by the addition or removal of a related record.
  - **Portal Contact fields in SugarBPM**: The portal fields on contact records are now available for use in process definitions (Portal Active) and process email templates (Portal Active, Portal Application).

## [Sales-Focused Enhancements](#)

- **Revenue line items on the Opportunity Record View dashlet**: By default, related revenue line items are now shown in the Opportunity Record View dashlet on Focus Drawer dashboards.
- [Sales stage classifications](#): Each sales stage (e.g., "Prospecting") can now be classified as "Open", "Closed Won", or "Closed Lost" to better control the intended meaning of stock and custom sales stages for your business processes.
- **Forecast Improvements**
  - **Updated look and feel**: Updates to column names, buttons, and the worksheet header make for a better and more intuitive user experience for sales agents and managers.
  - [Forecasting at the opportunity level](#): A new field in the Opportunities module, "Forecast", lets you cascade the Forecast value to the eligible revenue line item fields while creating or editing an opportunity.
  - **Total the value of likely revenue line items included in forecast**: A new field in the Opportunities module, "Forecasted Likely", totals the value of revenue line items' Likely fields that have been included in the forecast.
  - [Make personal and team forecast commitments](#): Sellers and sales managers can now make individual and team commits without tying those revenue amounts to specific deals or sales agents, allowing them to apply historical context and seller's instinct to the real-time deal data they get from Sugar.
  - [Highlight unsaved changes on seller forecast worksheet](#): When a sales agent updates a value on their forecasting worksheet, the changes are now highlighted until they save their changes.

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- [Cascade opportunity values to RLIs on create](#): A new field in the Opportunities module, "Set Across Revenue Line Items", lets you set the Expected Close Date, Sales Stage, Service Start Date, and Service Duration values for the eligible revenue line item fields while creating the opportunity.
  - [Active and inactive Product Catalog items](#): A new "Status" field in the Product Catalog module allows you to designate which products are currently available to sell to your customers and controls which products can be related to another record by default.
  - [UI Improvements to Product Catalog dashlet](#): A preview icon is now available in the Product Catalog dashlet that allows you to view the record details prior to adding the product as a line item.
  - [Lead Conversion improvements](#)
    - **Add limitless revenue line items**: You can now add as many revenue line items as you would like when creating an opportunity during lead conversion. Previously, you were limited to one.
    - **View and add product catalog records**: The Product Catalog and Product Catalog Quick Picks dashlets are now shown in the Convert Lead layout and can be used to add products to the Revenue Line Items subpanel.
    - **Cascade opportunity values during lead conversion**: The ability to cascade values from the opportunity to revenue line items is now available when creating an opportunity during lead conversion.
  - [Preview products from the Quick Picks dashlet](#): A preview icon has been added to the Product Catalog Quick Picks dashlet that allows users to easily view the product details prior to adding it as a line item.
  - [Web-to-lead form Redirect URL options](#): You can now specify whether to use a GET or POST request for a web-to-lead form Redirect URL and whether to include the form's data in the redirect request.

## [Service-Focused Enhancements](#)

- [Escalations](#): You can now escalate accounts, bugs, cases, and opportunities to bring more attention to them and track the progress of these business issues using the new Escalations module.

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- An "Escalate" action is available directly on records that can be escalated to quickly raise a concern.
  - A highly-visible Escalated badge is displayed on records with at least one open escalation in many views throughout Sugar so all users working with the record are aware of its state.
  - The Timeline dashlet has been made available for escalations so you can see an overview of all communications related to the escalation in chronological order.
  - **Primary case contact added to Contacts subpanel**: The contact related via a case's Primary Contact field will automatically be added to the case's Contacts subpanel.
  - **Attachments on case record view**: An Attachments field has been added to the Cases module in the app and in the portal for a more streamlined upload process and easier access to the files.
  - **Improved authoring for Knowledge Base articles**: Several layout changes to the Knowledge Base module's record view and Create drawer have been made to improve the authoring experience.

## Portal Enhancements

- **Enhanced portal customization**: Theme Portal has been expanded to let you change more aspects of the portal for your customers and shows you a live preview of your changes while you make them.
  - Show a New Case button on the Home page, and rename it if desired, so customers can quickly submit new cases.
  - Select a custom color for link text and buttons throughout the portal separately.
- **Timeline in Portal**: A timeline of all notes and emails is now displayed on cases in the portal, showing all relevant information directly within the view so users do not have to open the preview.
- **List view filters**: Portal users can now create custom filters on their portal list views.
- **Disable portal self-service signup**: A setting has been added to let you disable the link on the portal login page that allows customers to create their own portal account.

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- [\*\*Disable notes on the Knowledge Base\*\*](#): You can now configure the portal so that the Notes subpanel and the Add Note button are not displayed to portal users.
  - [\*\*Show the primary contact on cases\*\*](#): You can now add the Primary Contact field as a read-only and not clickable field to portal layouts for the Cases module.
  - [\*\*Read-only case status\*\*](#): When portal users are creating a new case, the status defaults to "New" and is read-only to prevent the user from choosing a different value.
  - [\*\*Easier note viewing in Portal\*\*](#): The full content of notes that are related to bugs and knowledge base articles in the portal will now be displayed directly in the view instead of requiring the user to open the record preview.

### [Sell Capabilities Added to Enterprise](#)

- [\*\*Focus Drawers\*\*](#): A new icon will appear when hovering over links to Sugar records in the application. On click, a targeted Focus Drawer dashboard reveals a 360 view of the linked record through a set of familiar dashlets. Users can create custom Focus Drawer dashboards and switch between them, find their place when drilling through related records via Focus Drawer breadcrumbs, and scroll to the next or previous record's Focus Drawer dashboard in a list view.
- [\*\*Merge Sugar data to DOCX, XLSX, PPTX\*\*](#): Sugar's Doc Merge functionality pulls data from your Sugar records and merges it into document templates without having to leave Sugar, enabling users to quickly export contracts, quotes, NDA agreements, form letters, labels, and more. Administrators can leverage a Doc Merge action in SugarBPM to automatically create merged documents as an integrated part of your business processes.
- [\*\*Renewals Console\*\*](#): This Home page dashboard provides a powerful work environment for Customer Success Managers using Sugar to manage accounts and opportunities in the renewal pipeline.
- [\*\*Pipeline renewal automation\*\*](#): When you close an opportunity containing a renewable service, Sugar will automatically create a renewal opportunity with an expected close date that aligns with the end date of the renewable

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service. Modules that are enhanced by pipeline renewal automation are Accounts, Opportunities, Revenue Line Items, Quoted Line Items, and Product Catalog.

- [Coterminous Add-ons](#): Add additional services or products onto existing business by keeping dates consistent and automatically updating the related renewal opportunity and revenue line items.
- **[Purchases and Purchased Line Items](#)**: Purchases represent each good or service a customer has bought while Purchased Line Items capture each time it was bought, providing a historically accurate record of sales and customer worth. For instances with Revenue Line Items enabled, purchases and purchased line items are automatically created for revenue line items that have a Sales Stage of "Closed Won" and their "Generate Purchase" field is set to "Yes" when the related opportunity's Sales Stage changes to "Closed Won".
- [Active Subscriptions dashlet](#): The Active Subscriptions dashlet can be added to the Account record view dashboard and shows a list of all of the current account's purchased line items that are marked as "Service", have a start date in the past, and have an end date in the future.
- [Business Centers](#): A new module is available for designating distinct time zones, operating hours, and holidays for different business centers in your organization. Distributed organizations can assign their accounts to the appropriate business centers and reference the business center relationship in reports and business processes.
- **Knowledge Base Search dashlet**: This dashlet allows you to search for articles and browse the tree-based article view, eliminating the need to navigate away from where you are working.
- **Messages module**: The Messages module has been added to track online interactions such as instant messaging or social media; Message records are also included in the Case and Contact Timeline dashlets.

## 11.0 Professional On-Site to 12.0 Enterprise On-Site

In addition to [the many Enterprise features](#) listed above, customers upgrading to Sugar Enterprise from Sugar Professional version 11.0.x will have access to the following Enterprise capabilities that were not available in their Professional subscription:

- [SugarBPM](#)
- [Action Buttons](#)
- [Business Centers](#)

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- [Comment Log Dashlet](#)
  - [Escalations](#)
  - [Holidays](#)
  - [Sugar Portal](#)
  - [Advanced Reports](#)
  - [Shifts and Shift Exceptions](#)
  - [Role-Based Dropdown Lists](#)
  - [Role-Based Record Views](#)
  - [Dropdown-Based Views](#)

## Fixed Issues When Upgrading From 11.0.x (Q2 2021)

The following issues are newly resolved in version 12.0.0 (Q2 2022) when upgrading from the 11.0.x (Q2 2021) release. [Case portal users](#) can use the following links for more details about each issue:

- [89327](#): Issues with the SOAP API may cause unexpected behaviors or errors to occur when using certain applications or integrations with Sugar.
- [89189](#): Relate fields incorrectly display as HTML links in Matrix reports.
- [89137](#): Drilling through bar charts in reports may not work as expected in certain circumstances.
- [89116](#): Clicking the Recalculate Values option from the Quoted Line Items list view does not work as expected.
- [89063](#): Recalculating calculated fields for opportunities or revenue line items may take longer than expected.
- [89056](#): When using the Horizontal or Vertical Bar (Grouped) chart type on a report and a secondary grouping exists, the data is incorrectly stacked within the bars instead of being grouped.
- [89018](#): In certain circumstances, a large number of bar charts may not render correctly in report results or in the Saved Reports Chart dashlet.
- [88998](#): Scrolling the report chart in the Saved Reports Chart dashlet may not work as expected if the data exceeds the size of the dashlet width.
- [88959](#): Searching based on last name, first name format in the Users module's Reports To field does not work as expected.
- [88941](#): Funnel charts do not display values as expected in reports.
- [88808](#): The contact record's related tasks may not appear in the Contact Timeline dashlet as expected.
- [88724](#): Clicking "SugarCloud Insights" from the Admin page in version 11.3.0 does not open up the SugarCloud Insights page as expected.
- [88723](#): The Calendar Scheduler dashlet on a shared dashboard does not filter events based on the current user when a transferable filter (e.g., My Calls) is used. Displayed events reflect the user who added the dashlet to

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the shared dashboard.

- [88700](#): PHP warning errors unexpectedly appear in PHP error logs across SugarCloud instances.
- [88642](#): Inserting dynamic images into PDF manager templates may not work as expected and result in an error.
- [88565](#): The Save and Cancel buttons are missing in the Project Tasks edit view.
- [88556](#): Generating reports (e.g., Rows and Columns report) with cases and related notes does not return any records in the report result.
- [88514](#): Doc merge fails with an error when using a document template containing currency fields.
- [88480](#): When using the Sugar Plug-in for Microsoft Excel, dragging the Sugar report to a cell on the Excel sheet displays an error message.
- [88252](#), [86138](#): When using Sugar running on an Oracle database, users may run into Oracle database errors in certain circumstances.
- [88464](#): SugarLive does not match the incoming phone number to the related contact or account record as expected.
- [88427](#): After upgrade, editing any previously created note records containing attachments may improperly cause the record to not appear in the related module's (e.g., Contacts) Notes subpanel as expected.
- [88411](#): An assignment notification email is improperly sent when a user adds an attachment to a note record they are assigned to in Sugar.
- [88403](#): Having more than 22 users or teams in Sugar may cause unexpected behavior when attempting to add a user or team calendar in the Calendar module.
- [88363](#): When logged into Sugar with certain languages (e.g., Spanish, French, German), some of the option labels may not display correctly in the Calendar module.
- [88344](#): Attempting to generate a report may fail and result in a 500 error when editing or copying existing reports.
- [88293](#): When viewing Sugar in dark mode, the Module dropdown field when editing a PDF template in Admin > PDF Manager appears grey and cannot be edited.
- [88280](#): Changes made to the bottom border color of the mega menu in Sugar may not display correctly after upgrading to Sugar 11.2.0.
- [88245](#): Creating a custom relationship to "Activities" in Admin > Studio may not work as expected and display an error.
- [88186](#): Copying an escalated record causes the Escalated badge to appear on the copy even though the record has no related escalations.
- [88178](#): Union queries with missing parentheses when using SugarQuery objects may not work as expected and cause a MySQL syntax error.
- [88134](#): In certain circumstances, clicking the "More revenue line items..." link in the Revenue Line Items subpanel may cause the Likely, Worst, and Best amounts to display incorrectly in the related opportunity's record view.
- [88113](#): Adding a new revenue line item from an existing purchased line



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item may incorrectly overwrite the renewal opportunity's revenue line item with the add-on price and quantity.

- [88092](#): If a note or case has more than five attachments, only the first five are displayed.
- [88086](#): Sidecar calendar "Double-click event" options that are intended to redirect user to a related module do not redirect user to the related module.
- [88085](#): Editing the Calendar Templates tab by clicking the pencil "edit" icon does not always retain changes after saving Sidecar calendar records.
- [88035](#): Certain custom language files get altered during the upgrade causing display labels to appear incorrectly in Sugar.
- [87985](#): When the case's Primary Contact Name field is marked as required in Admin > Studio, attempting to delete any cases with a related primary contact fails with an error.
- [87983](#): The "Merge to Doc" and "Merge to PDF" actions for Doc Merge are not available from list view Record Actions menus as expected.
- [87972](#): Attempting to integrate an external calendar app with the Sugar calendar using the iCal Subscription URL does not work as expected.
- [87967](#): Attempting to expand panels when engaging in a SugarBPM approval process may not work as expected.
- [87960](#): For instances that use SugarIdentity, having the Administration page open in Sugar when initiating the impersonation session in SugarCloud Settings may cause the impersonation to fail with an error.
- [87952](#): The import file template for certain modules (e.g., Contacts, Cases, Opportunities, Revenue Line Items) incorrectly displays the Account Name column twice, requiring both fields to be mapped for import.
- [87949](#): Creating contacts via vCard may not work as expected and fail with an error.
- [87899](#): When Sugar is loaded via an iframe, accessing legacy modules may result in an error.
- [87896](#): Sales type modules incorrectly have the base\_rate field defined as a TextArea data type field instead of a Decimal field causing unexpected issues when generating reports in certain circumstances.
- [87823](#): Running the get\_module\_fields SOAP method in Sugar 11.1.0 may fail with an error.
- [87802](#): Enabling the Proxy settings without populating the required "Proxy Host" and "Port" fields incorrectly saves, causing loss of access to Sugar.
- [87791](#): When email templates with attachments are created in the legacy user interface, the attachments do not display in the template as expected when viewed in the Sidecar user interface.
- [87755](#): When the package scanner runs the health check scan against module loadable packages, the generated log files get improperly added to the root directory.
- [87632](#): Sugar Portal does not load as expected in an iframe on a different domain.
- [87623](#): Unexpected behaviors may be experienced when performing



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actions in certain Admin modules (e.g., Studio, Module Loader) due to unstable OrderMapping files.

- [87603](#): The Customer Sentiment field does not appear on the Call card in the Timeline dashlet for the call's related account and contact records.
- [87600](#): Replying to or forwarding an email via the Timeline dashlet on a case does not link the new email record to the case.
- [87589](#): In certain circumstances, if the parent opportunity's sales stage value changes, it may incorrectly cascade the value to the open revenue line items even though the "Update Open Revenue Line Items" option is not checked.
- [87529](#): In certain circumstances, the Prediction dashlets (e.g. Leads Conversion Prediction dashlet) and Discover dashlets may fail to load in Sugar and display a CAT-404 error.
- [87442](#): Calculated date fields may not work as expected between 23:45 and 00:00 when using UTC timezone.
- [87441](#): Filtering the Address Book in the Emails module may result in a 500 error for users assigned to certain role restrictions.
- [87387](#): In certain circumstances, updating the currency conversion rate may cause unexpected performance issues with schedulers.
- [87375](#): In certain circumstances, there may be unexpected issues when performing certain actions in Sugar such as editing dropdown lists via Admin > Dropdown Editor.
- [87371](#): The email body for imported emails may be blank for emails containing certain characters and/or character sets.
- [87331](#): When more than one quote is generated from a single revenue line item, the quoted line items may incorrectly be related to the first quote that was generated instead of the parent quote.
- [87312](#): In certain circumstances, customers using the SugarChimp integration may experience unexpected performance degradations in Sugar.
- [87301](#): Attempting to import emails that contain non-traditional formatting in the From field or recipient fields (e.g., To, Cc, Bcc) will cause the import to fail and prevent subsequent emails from being imported to Sugar.
- [87244](#): Clicking the Focus icon for a custom quoted line item on a quote record opens up a blank Focus Drawer dashboard.
- [87232](#): In certain circumstances, duplicate email campaigns may be sent out multiple times from the system.
- [87225](#): Creating coterminous add-ons for a closed opportunity improperly creates multiple revenue line items causing renewals to be off.
- [87216](#): In certain circumstances, generating quotes/orders via the Revenue Line Items subpanel in an opportunity record may incorrectly set the Quantity field to "1" on the quote worksheet.
- [87189](#), [87145](#): When linking existing records via the related record subpanel, clicking the "More <module name>" link (e.g. More Contacts) in the Search and Select drawer does not load the next set of records as expected.

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- [87127](#): Attempting to download a plug-in file (e.g. Sugar Plug-in for Outlook) in Sugar may result in an error.
  - [87126](#): When drilling through report charts, the filtered list view may display a different record count than what is shown on the chart depending on the user's timezone.
  - [87101](#): When a case's Resolved Date field gets cleared, the field gets auto-populated with an incorrect date value instead of remaining blank.
  - [87093](#): In certain circumstances, entering a single character (e.g. a) into the Global Search box may result in a 500 error for Sugar instances using Elasticsearch 7.x.
  - [87069](#): Users with a NULL license type may experience unexpected behaviors if the Sugar license type for their organization gets updated.
  - [87024](#): Hidden required dependent fields improperly prevent records from being saved.
  - [86980](#): Record names may not be truncated properly in the record pill when linking existing records or creating filters in the list view.
  - [86831](#): Certain inbound email errors may cause the Check Inbound Mailboxes scheduler to stop working as expected.
  - [86827](#): In certain circumstances, deleting a dashlet may not work as expected for a modified dashboard.
  - [86794](#): Reporting on currency fields in the Purchases module may not generate the report as expected and result in a database failure.
  - [86726](#): Renewal generation does not link the original revenue line item with its renewal when the original revenue line item is an add-on.
  - [86715](#): Attachments added to a note on a case may not appear as expected in the Sugar portal.
  - [86696](#): Selecting the Edit Report option in the Reports list view's Record Actions menu may fail to load the report as expected.
  - [86691](#), [86686](#), [86382](#): In certain circumstances, inbound emails may fail to import to Sugar.
  - [86677](#): When installing packages via Module Loader, the text on the License screen may not be formatted correctly making it hard to read the license agreement.
  - [86676](#): Enabling the Activity Stream Purger scheduler may cause unexpected errors to occur in Sugar for users.
  - [86646](#): Note attachments may not display in the Notes subpanel as expected for any notes created after upgrading to version 10.3 or higher.
  - [86639](#): Clicking the Preview (Eye) icon in the Guests panel for calls and meetings may not work as expected.
  - [86604](#): Attachments added to a note are not assigned to the same team as the related Note record.
  - [86594](#): Users can view and delete files that are attached to unsaved Note records, resulting in unexpected behavior.
  - [86556](#): The minus (-) button to remove the adjacent email address for a record improperly gets shifted below the other buttons that appear to the right of the Email Address field.

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- [86505](#): In certain circumstances, custom relationships that have the module label changed may incorrectly revert to the original label if another relationship using the same modules get created in Admin > Studio.
  - [86478](#): The Data Archiver in Sugar cannot be used to properly delete pmse\_bpm\_flow records from the database.
  - [86470](#): Updating the currency rate in Sugar may improperly cause the sum of the closed won revenue line items to be calculated incorrectly in the Summation With Details report.
  - [86443](#): Downloading email attachments with long file names may incorrectly display the file name as "filename" or may not download as expected.
  - [86431](#): Removing certain fields (e.g., Attachments, Tags) from the Preview layout may cause the field to disappear from Studio for certain modules (e.g., Knowledge Base, Notes).
  - [86385](#): The email body for imported emails may be blank for emails where the character set fails to convert from gb2312 to utf-8.
  - [86362](#): Adding a custom read-only dependency to a module (e.g. Quotes) may cause unexpected issues when attempting to preview a record in the module.
  - [86227](#): The Grand Total column in the Quotes subpanel may not display the correct converted amount for quotes that are created using a currency that differs from the system-defined default currency.
  - [86128](#): The Product Catalog dashlet becomes unusable when there are a large number of product templates and product categories.
  - [86122](#): Summation With Details report shows incorrect currency symbol when the currency field being displayed is from a related module.
  - [86060](#): Adding a Start Event with criteria set to "Assigned to changes" may not trigger the process definition as expected.
  - [86001](#): The "Request to Close" button is not available in the Sugar portal for customers with Sugar Sell and Sugar Serve licenses.
  - [85795](#): When editing the existing inbound email account, the User Name field does not display a value and appears blank in the layout.
  - [85783](#), [79698](#): When merging records, fields that are required under certain conditions are required even if the conditions have not been met.
  - [85593](#): Multiple entries get added to the Tracker table for SugarBPM and Activity Stream records causing the table to grow very large.
  - [85572](#): The Body field in the Knowledge Base module does not display in the intelligence pane when previewing the record.
  - [85550](#): In certain circumstances, the funnel chart in reports may display incorrect values.
  - [85536](#): The RT SalesMap integration version 4.6 and higher may not pass the health check as expected.
  - [85368](#): In certain circumstances, users may run into unexpected errors when trying to access certain modules and/or notice modules missing from the navigation bar.
  - [84925](#): The Restore Default Layout option does not bring the customized

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role-view back to the Default role-view's layout in Studio as expected for the Opportunities module.

- [84670](#): Performing global search may not work as expected and result in a 500 error for instances containing a large number of team sets.
- [84582](#): In certain circumstances, a blank space may appear in place of any dependent dropdown field(s) that are hidden in the record view layout if there is a filler next to the field(s).
- [84524](#): Adding a SetValue dependency to the Quotes module improperly removes the "Cancel" and "Save" buttons from the Quotes Configuration page.
- [84295](#): Regular users may not be able to filter the Emails list view using the Inbound Account field as expected.
- [83557](#): Changes made to the Product Catalog record view layout in Admin > Studio does not affect the layout of the Product Catalog record that appears when clicking the icon to the left of a product's name in the Product Catalog dashlet.
- [83510](#): In certain circumstances, PHP warning errors may occur for certain SugarCloud instances.
- [83426](#): Filtering reports using the Knowledge Base module's External Article field may not work as expected and result in unexpected issues.
- [83226](#): Cases created from inbound emails do not respect the default Priority value set in Admin > Studio.
- [83101](#): Changes made to reports in the Saved Reports Chart dashlet do not get updated automatically causing unexpected issues when users drill through the report chart in the dashlet.
- [82914](#): Running reports in instances with a large number of team sets may fail to generate for non-admin users and result in performance issues.
- [82813](#): Performing full-text search re-indexes from the command line or via Admin > Search may run out of memory when run on very large data sets.
- [82729](#): In certain circumstances, filtering reports using a DateTime-type field causes unexpected issues in the report results including incorrect dates in the report query.
- [82601](#): Sorting the Knowledge Base list view may not work as expected if there is a knowledge base article with multiple revisions.
- [82559](#): Certain customizations in Sugar may cause the upgrade to fail.
- [82502](#): In certain circumstances, reports grouped by "Fiscal Year: Date Created" may display the wrong fiscal year in report results.
- [82493](#): Users may be unable to send outbound emails if the "Allow users to use this account for outgoing email" option is disabled via Admin > System Email Settings.
- [82437](#): Drilling through report charts from the Saved Reports Chart dashlet may not work as expected and return incorrect results if the report has a run-time filter applied.
- [82011](#): Quotation marks in the field's display label cause process definitions with the "Add Related Record" action to not create new records as expected.

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- [81812](#): Greater than and less than symbols do not display correctly in the description for cases created from inbound emails.
  - [81735](#): When required Date fields get validated, the error tooltip does not appear in the field as expected.
  - [81703](#): The Developer Mode option is available to enable in Admin > System Settings for SugarCloud instances.
  - [81547](#): In certain circumstances, installing a package via module loader may not work as expected and cause Sugar to become inaccessible with a 500 error.
  - [81392](#): Resetting the Forecasts module improperly reverts the custom formula applied to the opportunity's Likely field back to the out-of-the-box formula.
  - [81341](#): The currency name and symbol cannot be edited in Sugar when the "ISO 4217 Code" is populated.
  - [81279](#): When creating new opportunities, the Revenue Line Items subpanel may not properly respect the Forecast Range settings and incorrectly display "Exclude" in the Forecast field.
  - [81061](#): In certain circumstances, setting the "Bar chart value placement" for the Saved Reports Chart dashlet may cause large values to be rounded incorrectly.
  - [80884](#): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message that continues to persist.
  - [80729](#): Advanced reports containing a multibyte string appear unreadable on the exported CSV file.
  - [80245](#): Clicking "Search and Select" when creating a quoted line item on a quote may improperly open up duplicate search and select drawers resulting in unexpected behavior.
  - [79970](#): Iframe fields may not render as expected for records created via the API as the ampersand (&) in the URL incorrectly gets translated to "&amp;" for the iframe field.
  - [79125](#): Cases that are automatically created from inbound emails do not get assigned to the group user as expected.
  - [78672](#): Studio incorrectly allows a dropdown list to be created using the same name as an existing dropdown list, causing data issues for records using the original list.
  - [78580](#): Saving a record without completing the Salutation field which is marked as required in Admin > Studio may result in unexpected behavior.
  - [78541](#): Setting a dropdown field to be read-only does not work as expected if the field is a dependent dropdown.
  - [78334](#): Performing certain actions in records containing calculated fields with rollup functions (e.g. rollupSum) and a large number of related records may cause performance issues in Sugar.
  - [77506](#): Attempting to filter reports by Tags ID may not work as expected.
  - [77351](#): Inserting a field variable (e.g. {::Leads::id::}) in the URL for a process email template may cause the URL link in the email to not work as expected.

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- [76114](#): When updating product records via import, the product's selected currency is not respected and the records are imported using the instance's base currency (USD) instead resulting in incorrect data.
  - [72432](#): Creating a report for the Quoted Line Items module using the Discount Amount field as a display column fails to generate with an error.

## Known Issues

The following known issues are present in version 12.0.0 (Q2 2022). [Case Portal users](#) can use the following links for more details about each issue:

- [89457](#): The search bar in SugarLive does not work in instances that include Hint (e.g., Sugar Premier instances).
- [89147](#): When a Summation With Details report is grouped using more than one field, invalid characters may display in the report results.
- [89114](#): Funnel charts may not display properly when viewed in reports and dashlets.
- [89078](#): In certain circumstances, the navigation bar may not display correctly after upgrading to version 11.3. For information on the workaround, refer to the issue's description on the bug portal.
- [88957](#): In certain circumstances, performing a global search in Sugar may result in a 500 error.
- [88587](#): The titles used for left-hand Calendar panels may not properly set users' expectations for the calendars that are available.
- [88532](#): When sending emails using an email template containing an attachment, the attachment does not get included in the email as expected.
- [88436](#): When a user does not have access to the calendar due to teams permissions, the calendar still appears as an option in the Calendar UI under "My Calendars".
- [88374](#): Attempting to reorder the columns in the Worksheet Columns Preview list view in Admin > Quotes Configuration does not work as expected. As a workaround, remove all the fields from the Worksheet Columns section then add the fields again to the section.
- [88358](#): Installing packages via Module Loader may fail with a PHP fatal error.
- [88261](#): Attempting to download a PDF file may fail if the PDF template contains an image that is hosted on a site using "HTTPS" in the URL. As a workaround, use an image that does not contain "HTTPS" in the URL.
- [88206](#): In certain circumstances, installing packages in Module Loader may not work as expected and the package may get uninstalled with errors.
- [88188](#): Drilling through report charts may not work as expected for Summation-type reports filtered or grouped a certain way.
- [88098](#): Sorting certain module list views (e.g., Contacts) by the Account



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Name column may not display the records in the correct alphabetical order as expected.

- [88055](#): Users may experience unexpected behaviors when using Sugar via the Firefox browser. As a workaround, access Sugar using Chrome or Microsoft Edge browsers.
- [87908](#): For instances that use SugarIdentity, the Reset Multi-Factor Auth option improperly appears during a user impersonation session.
- [87880](#): The default system currency incorrectly displays "US Dollars" as the currency name even though the system currency is changed to a non-USD currency (e.g., AU Dollars) in Admin > Locale.
- [87701](#): Naming a custom field "processed" causes web logic hooks to fail to fire because it conflicts with Sugar's internal logic hook handling. As a workaround, use a different, un-reserved string as the field name.
- [87698](#): For instances that use SugarIdentity, if an admin impersonates a user and the access token expires, the admin user improperly begins to impersonate their own user account once the user's impersonation session ends.
- [87602](#): In Sugar Enterprise, portal customization settings for the following features in Admin > Sugar Portal > Theme Portal are available but not applicable to the portal: the search bar, the banner, and the dashboard.
- [87601](#): In Sugar Sell, portal customization settings for the following features in Admin > Sugar Portal > Theme Portal are available but not applicable to the portal: the search bar, the banner, the New Case button, and the dashboard.
- [87477](#): Removing the Discount Amount field then re-enabling the field in Admin > Quotes Configuration may cause the Discount Amount field to not display correctly when creating quoted line items on the quote worksheet. As a workaround, navigate to Admin > Quotes Configuration and click "Restore Defaults" under the Worksheet Columns section and be sure to have the Discount Amount field enabled.
- [87100](#): Creating an email template with an attachment does not save the attachment as expected.
- [87018](#): Hard deleting note records via the Data Archiver module does not delete the record's file attachments in the upload directory as expected.
- [86849](#): In certain circumstances, refreshing the browser may improperly change the order of dashlets on the dashboard.
- [86836](#): When making changes in the Configure Summary Panel drawer of the SugarLive configuration view, opening a module in the navigation bar does not warn you before discarding your changes.
- [86493](#): Modifying the Preview layout for the Notes module prior to upgrading to version 10.3 may cause the Attachments field in the layout to not display multiple note attachments as expected. For information on the workaround, refer to the issue's description on the bug portal.
- [86364](#): In certain circumstances, the report chart in the Saved Reports Chart dashlet may not display using the same sort order as the original report.

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- [86335](#): SugarLive does not become available when you populate the Contact Control Panel URL field unless a value is also entered in the Instance Name field. As a workaround, enter a dummy value in the Instance Name field.
  - [86285](#): In certain circumstances, users may experience unexpected behaviors when attempting to expand a subpanel or edit an empty Subpanel layout in Admin > Studio. For information on the workaround, refer to the issue's description on the bug portal.
  - [86256](#): Portal users may be unable to drag and drop files as attachments for Notes in the Sugar Portal.
  - [86255](#): When SugarLive is open, navigating to the Admin page in Sugar may not work as expected. As a workaround, navigate to a modules list view while SugarLive is open then open SugarLive again and navigate to the Admin page.
  - [86010](#): Auditing relate fields connected to 1:1 relationships only audits changes on one side.
  - [85962](#): Dashlets with filters on a shared dashboard may not be accessible to members of the associated team(s) as expected.
  - [85673](#): Installing a custom module that was built and exported from Module Builder may fail to install with an error.
  - [85589](#): Saving the SAML settings may fail with an error "Maximum Length should be positive value" when the maximum length is not set for Sugar password requirements.
  - [85533](#): If you have multiple tabs open when a call or chat ends in SugarLive, the Create drawer for the call or message record opens in every tab, resulting in duplicate records being created.
  - [85458](#): The body of the email does not display as expected when accessing Sugar via Firefox 80. As a workaround, open the Developer Tools console and refresh the page to view the email body.
  - [85435](#): The subpanel column widths may not behave as expected in certain circumstances to display all the columns without having to use the scrollbar.
  - [85409](#): After refreshing the browser, the SugarLive icon in the footer indicates that the user is logged out of SugarLive when they are not.
  - [85342](#): When the Assignment Notification Emails template is customized using new variables (e.g. \$account\_name), the email notification does not pull in the relevant information as expected and display the variables in plain text instead.
  - [85246](#): Errors may get logged in the system after upgrading or installing Sugar when certain license data is missing.
  - [85047](#): Moving fields between the Columns and Available Fields sections of Console Settings may not work on Internet Explorer 11.
  - [85046](#): SugarBPM's Round Robin "Set 'Assigned To' by availability" option is not available in Internet Explorer 11.
  - [84987](#): User assigned to the Service Console and/or Renewals Console cannot configure the module tab drawer as expected to add or remove



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dashlets.

- [84909](#): Hyperlinks are not clickable in text area fields for Legacy modules (e.g. Documents). As a workaround, add "https://" in the URL (e.g. https://www.example.com) for Legacy modules and the hyperlink will then be clickable.
- [84884](#): For SugarIdentity-enabled instances, employee records that are tied to a user record in the Cloud Settings console cannot be duplicated in Sugar.
- [84692](#): Certain reports may not generate as expected if the last group-by field is a date (e.g. Opportunities > Week: Expected Close Date) and the report contains a chart (e.g. Horizontal Bar).
- [84684](#): In certain circumstances, saving the Preview View layout for modules (e.g. Accounts) via Admin > Studio may not work as expected and result in an error.
- [84426](#): The Meeting Type field in the Meetings module does not reflect new values added to the Meeting Type dropdown list in Admin > Dropdown Editor.
- [83997](#): Adding additional panels/tabs or removing the Show More panel in the Record View Layout in Studio may cause the record view layout to display incorrectly. As a workaround, restore the default layout in Admin > Studio.
- [83985](#): When the "Field Name Placement" user preference is set to "Beside Field Value", some labels will remain above the field value for the Calls and Meetings modules.
- [83880](#): Changes made to role-based view layouts are not applied to users assigned to the role. As a workaround, perform a Quick Repair and Rebuild for the change to take effect.
- [83796](#): SugarBPM processes always run after module-level logic hooks and it is not possible to configure them to run before logic hooks.
- [83716](#): Attempting to deploy a package via Module Builder or Module Loader may fail with an error.
- [83715](#): User assigned to the Service Console and/or Renewals Console does not have access to configure the console settings.
- [83574](#): Editing contact records containing a duplicate portal name may result in a number of unexpected errors when saving the record.
- [83461](#): Sugar licenses that are not revalidated after purchasing additional seats or a renewal may result in unexpected behavior with list view filters. As a workaround, re-validate the license via Admin > License Management.
- [83425](#): Custom Date fields in the PDF template may not respect the user's preferred date format.
- [83335](#): Performance issues may occur for instances that have a number of related calculated fields, legacy workflows, and SugarBPM processes that trigger at the same time.
- [83328](#): Generating reports may result in a database error for Sugar instances using MySQL 5.7 if the ONLY\_FULL\_GROUP\_BY setting is

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enabled. As a workaround, disable `sql_mode=only_full_group_by` in the MySQL server configuration.

- [82840](#): Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [82810](#): Fields based on non-existent or improperly defined custom field types may cause upgrades to fail.
- [82756](#): Upgrades fail when a filter exists for a module that has been removed.
- [82742](#): The Forecast Bar Chart Dashlet may not load as expected in shared dashboards.
- [82486](#): Upgrades may fail when a custom field has conflicting field types defined.
- [82468](#): Custom decimal fields may prevent upgrades from completing and result in invalid alter queries being generated. As a workaround, use the queries described in the issue's description on the bug portal to convert the decimal fields.
- [82384](#): Deleting note records created from email attachments may not work as expected and continue to persist in the upload directory.
- [82361](#): Emails sent from SugarBPM's processes may not include the link to new lead records generated from a Web-to-Lead form even though the process email template contains a link variable.
- [82230](#): Exporting a Summation report may fail with an error if the computed derivative (e.g. Count, SUM) is missing in the Choose Display Summaries step.
- [82050](#): Web logic hooks may not trigger as expected after save when new records are created.
- [81722](#): Sorting the fields by the column header (e.g. Name) in Admin > Studio or Module Builder may result in CSRF errors being written to the log file.
- [81382](#): Deleting a target list related to a large number of records may fail with an error.
- [81339](#): Generating a report (e.g. Summation with Details) grouped by "Fiscal Quarter" for a custom date field (e.g. Fiscal Quarter: Booking Date) may result in a database failure error.
- [81297](#): If a web-to-lead form gets submitted using an existing email address in Sugar, the email address may not be marked as "Primary" for the generated lead record.
- [81276](#): When there are multiple group-by fields in a Summation With Details report, generating the report with a chart or trying to view a dashboard containing the saved report chart dashlet may result in performance issues.
- [80968](#): Attempting to disable SAML authentication via Admin > Password Management may not work as expected in certain circumstances.
- [80865](#): It is not possible to search by the Record Name column in Process Management.
- [80759](#): In PDF templates that contain more than one href link, only the first

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link works.

- [80681](#): Making changes to a report's relationship-based filters may result in an error when running the report. As a workaround, re-create the report with the desired filter without making any changes to it.
- [80091](#): Creating a dashboard may not work as expected and result in an error for users without private teams. Navigating to Admin > Repair and running "Repair Teams" will help resolve the issue.
- [80002](#): Generating PDFs using previously existing PDF templates may not display data as expected after upgrading to Sugar versions 7.9 or higher.
- [80001](#): Email messages sent via SugarBPM may display HTML formatting when records are created using SOAP/REST v4.1. It is recommended to use the latest version of the API.
- [79510](#): Email addresses are not shown on the import summary screen even though they were properly imported.
- [79173](#): When attempting to navigate away from the module or save the record, the Unsaved changes warning message may unexpectedly appear for modules containing custom dependent fields.
- [79131](#): When the "Listview items per page" setting in Admin > System Settings contains a large value (e.g. 50 or greater), it may cause an issue with rendering the "Download PDF" and "Email PDF" options in the record view's actions menu. Changing the "Listview items per page" setting to "20" may help resolve the issue.
- [79108](#): When editing a record via the list view preview on the intelligence pane, the Resolve Conflict drawer may appear unexpectedly upon save.
- [79009](#): When the targeted module contains a broken field, configuring an Action element in a process definition causes the Process Design canvas to time out.
- [78890](#): Updating composer in instances with custom modules deployed from module builder may cause unexpected errors.
- [78885](#): A SugarBPM process may be prematurely considered complete when part of the process remains unexecuted in job queue.
- [78709](#): Users assigned a role with Delete, Edit, or Export permission set to "Owner" may improperly be restricted from downloading and emailing PDFs.
- [78600](#): Special characters are improperly allowed to be entered in dropdown lists' item names.
- [78582](#): Process definitions do not enforce the requirement that multiple paths must converge before an End event.
- [78527](#): Inline editing a TextArea field via the subpanel may not work as expected. Reloading the web browser will resolve the issue and allow the user to inline edit the field properly.
- [78315](#): The same Process ID may be used for multiple processes if a process definition's Start condition is triggered by simultaneous events.
- [77738](#): Attempting to merge two records (e.g. accounts) may fail with an error if the record that is being merged to the primary record contains a large number of related records (e.g. contacts).

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- [77719](#): If a process definition contains a Wait event that is relative to a date field, the process does not adjust for changes that may occur to the date field after the Wait event's initiation.
  - [77609](#): Generating reports with empty relate fields may not include the associated record in the report result as expected if the related record has been deleted.
  - [77287](#): Performing certain actions (e.g. import, mass update) in Sugar may result in performance issues if there are numerous calculated fields to be updated in related records. As a workaround, add the following line to the config\_override.php file to disable the related calculation field updates: `$sugar_config['disable_related_calc_fields'] = true;`. But keep in mind that the affected calculated values will not be updated and running Recalculate Values on related records.
  - [77249](#): Guests may not get imported to call or meeting records as expected.
  - [77087](#): When a record is assigned to the user's default private team, changing the Teams field from the private team to another team (e.g. Global) may incorrectly display the team name with the user's last name appended to the end (e.g. Global Smith).
  - [77055](#): Attempting to mass update the user's outbound email client via Admin > User Management may not work as expected.
  - [76401](#): The data in the report chart may be inconsistent between the report chart dashlet and the Reports module.
  - [76014](#): Mass-updating a large number of records that trigger the start event on one or more process definitions will result in a PHP timeout error. Additionally, any processes created before PHP timed out may be corrupt.
  - [75254](#): Printing reports (e.g. Summation With Details report) to PDF may not work as expected when logged into Sugar via a mobile browser.
  - [74919](#): Performing certain actions (e.g. Quick Repair and Rebuild) in Sugar that rebuild the cache files may cause unexpected issues in the system if there are multiple users logged in and utilizing Sugar. As a workaround, perform such actions during off-hours where users are not utilizing the system.
  - [74628](#): Certain workflows using a Relate-type field in the condition may fail to load as expected and result in errors after upgrading to 7.6.x.x. As a workaround, run the following query in the instance's expressions table:

```
UPDATE expressions
SET    exp_type = "id"
WHERE  exp_type = "relate"
      AND lhs_field = "assigned_user_id"
```

- [74382](#): The Case Summary dashlet may not work as expected and cause an internal server error if the account record has a large number of related cases.
- [74350](#): An unexpected error may occur when saving a record if there is an

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issue with the user's default team in the database. As a workaround, run the following query in the instance's team sets table. The affected users will then need to edit their profile to configure their default teams again.

```
UPDATE team_sets
SET     deleted = 1
WHERE   id NOT IN ("select team_set_id from team_sets_teams where
                  deleted = 0")
        AND deleted = 0
```

- [73566](#): Calculated or dependent fields containing a related() function may not get calculated until after save for activity-type modules (e.g. Notes).
- [73468](#): Time-elapse workflow may not trigger as expected when a date field (e.g. Expected Close Date) in the condition is set to a date in the future.
- [72810](#): Filtering the list view search using custom checkbox fields may not work as expected.
- [72581](#): Attempting to merge records in modules containing required dependent fields may not work as expected.
- [71848](#): When a large number (e.g. 60) of PDF templates are available in a module, users may not be able to scroll through the full list of templates via the "Download PDF" or "Email PDF" options in the record view. As a workaround, changing the screen resolution or reducing the number of templates may help resolve the issue.
- [71733](#): Printing archived emails via the browser's print option may not display correctly.
- [68985](#): Custom relationships created between a module and the Activities module via Admin > Studio cannot be deleted as expected.
- [68975](#): Changing the order of subpanels via Admin > Display Modules and Subpanels does not preserve the order upon save.
- [68112](#): Matrix-type reports display incorrectly when exported to PDF.

## Developer

Please refer to the [Developer Blog in the SugarClub community](#) for a summary of the changes in version 12.0.0 (Q2 2022) that may affect developers.

## Supported Platforms

For information on supported platform components, see [Sugar 12.0.x Supported Platforms](#).

## Upgrade Paths

### Sugar Enterprise Upgrade Paths

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Package	From Version(s)	MySQL	SQLServer	DB2	Oracle
New Installs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.0.3-to-12.0.0	11.0.3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
11.3.0-to-12.0.0	11.3.0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

**integrations\_panel**

**uiux\_panel**

**activity\_panel**

**admin\_panel**

**bpm\_panel**

**sales\_panel**

**service\_panel**

**portal\_panel**

**new\_ent\_panel**

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