Sugar Enterprise 12.0.2 Release Notes

Sugar Enterprise 12.0.2 Release Notes

Overview

This document describes the changes and functionality available in Sugar® Enterprise 12.0.2. Sugar 12.0.2 is available for customers on the annual upgrade path. For customers upgrading from 11.0.5, please refer to the Sugar 12.0.x release notes for additional features, fixed issues, and developer changes occurring between versions 11.0.5 and 12.0.2.

Note: This release is not available for SugarCloud customers.

Administrator and End User

Fixed Issues

Sugar 12.0.2 is a security update released to address certain security vulnerabilities identified during our routine QA checks.

We strongly recommend that you install this update at the earliest opportunity. While we have not experienced any reported incidents relating to this vulnerability to date, failure to install this update could leave you exposed to malicious third-party attacks. For more information regarding this vulnerability, please refer to the following Security Advisory announcement and our FAQ.

- Security Advisory sugarcrm-sa-2023-001: Any users may cause arbitrary code to be executed.

This vulnerability has been addressed in release 12.0.2, which is available for download from the Download Manager.

Administrators are strongly encouraged to upgrade **their Sugar instances running** 12.0.1 or lower **to version 12.0.2 to prevent potential exploitation of this weakness**.

Known Issues

The following known issues are present in this release. 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 defect'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 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 defect'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.
- 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 expland a subpanel or edit an empty Subpanel layout in Admin > Studio. For information on the workaround, refer to the defect'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](): Installng 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 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 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 defect'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 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).
- [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 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.

Supported Platforms

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

Upgrade Paths

Sugar Enterprise Upgrade Paths

Package	From Version(s)	MySQL	SQLServer	DB2	Oracle
New Installs		☐	☐	☐	☐
11.0.5-to-12.0.2	11.0.5	☐	☐	☐	☐
12.0.x-to-12.0.2	12.0.0 - 12.0.1	☐	☐	☐	☐

integrations

uiux

activity

admin

bpm

sales

service

portal

new_ent