
Sugar Professional 11.2.0 (Q4 2021) Release Notes

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Sugar Professional 11.2.0 (Q4 2021) Release Notes

Overview

This document describes the changes and functionality available in Sugar Professional 11.2.0 (Q4 2021). Sugar 11.2.0 is only available for SugarCloud (Sugar-hosted SaaS) deployments.

For information about this release's changes to existing functionality, please refer to the [What to Expect When Upgrading to 11.2](#) article.

Feature Enhancements

The following feature enhancements are included in Sugar Professional 11.2.0 (Q4 2021):

UI/UX Enhancements

- [Light and dark theme options](#): 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.
- [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.
- [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.

Calendar Enhancements

- [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.

Product Catalog Enhancements

- **[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.

Activities, Notes, and Attachments

- **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.
- **[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.
- **[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.
- **[Attachments on case record view](#)**: An Attachments field has been added to the Cases module in the app for a more streamlined upload process and easier access to the files.
- **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.

Fixed Issues

The following issues are resolved in this release. [Case portal users](#) can use the following links for more details about each issue:

- [87823](#): Running the `get_module_fields` SOAP method in Sugar 11.1.0 may fail with an error.
- [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.
- [87623](#): Unexpected behaviors may be experienced when performing actions in certain Admin modules (e.g., Studio, Module Loader) due to unstable OrderMapping files.
- [87371](#): The email body for imported emails may be blank for emails containing certain characters and/or character sets.
- [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.
- [87069](#): Users with a NULL license type may experience unexpected behaviors if the Sugar license type for their organization gets updated.
- [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.
- [86122](#): Summation With Details report shows incorrect currency symbol when the currency field being displayed is from a related module.
- [85795](#): When editing the existing inbound email account, the User Name field does not display a value and appears blank in the layout.
- [85593](#): Multiple entries get added to the Tracker table for Activity Stream records causing the table to grow very large.
- [85536](#): The RT SalesMap integration version 4.6 and higher may not pass the health check 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.
- [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.

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- [82559](#): Certain customizations in Sugar may cause the upgrade to fail.
 - [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.
 - [78580](#): Saving a record without completing the Salutation field which is marked as required in Admin > Studio may result in unexpected behavior.
 - [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.

Known Issues

The following known issues are present in version 11.2.0 (Q4 2021). [Case Portal users](#) can use the following links for more details about each issue:

- [88092](#): If a note has more than five attachments, only the first five are displayed. As a workaround, click "Download All" to download the zip file containing the attachments, which includes those that are not visible on the screen.
- [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.
- [88081](#): The "My Calendars" section of the Sidecar calendar shows items that are not owned by the current user.
- [87972](#): Attempting to integrate an external calendar app with the Sugar calendar using the iCal Subscription URL does 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. As a workaround, navigate away from the Admin page before initiating the impersonation session.
- [87952](#): The import file template for certain modules (e.g., Contacts, Cases, Opportunities) incorrectly displays the Account Name column twice, requiring both fields to be mapped for import.
- [87908](#): For instances that use SugarIdentity, the Reset Multi-Factor Auth option improperly appears during a user impersonation session.
- [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.
- [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.

- [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.
- [87232](#): In certain circumstances, duplicate email campaigns may be sent out multiple times from the system.
- [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.
- [86702](#): Resetting a user's password may not work as expected and display an error for instances that have the System-Generated Passwords feature enabled in Admin > Password Management. As a workaround, disable the System-Generated Passwords feature and manually reset the user's password.
- [86696](#): Attempting to edit a report using the "Edit Report" option in the list view's Actions menu may not work as expected as the report fails to load.
- [86646](#), [86493](#): Note attachments may not display as expected after upgrading to version 10.3 or higher.
- [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.
- [86333](#): Disabling the "Allow users to use this account for outgoing email" option in Admin > System Email Settings may result in unexpected behavior in Email > Email Settings.
- [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.
- [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.
- [85396](#): In certain circumstances, administrators are improperly allowed to edit read-only fields in the Users module for SugarIdentity-enabled instances resulting in unexpected behaviors and errors.

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- [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.
 - [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.
 - [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.
 - [84551](#): Legacy workflows created in Sugar Professional continue to remain active and trigger improperly after the customer migrates to Sugar Sell or Sugar Serve.
 - [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.
 - [83716](#): Attempting to deploy a package via Module Builder or Module Loader may fail with an error.
 - [83510](#): In certain circumstances, PHP warning errors may occur for certain SugarCloud instances.
 - [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.
 - [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.
- [82454](#): Entering duplicate email addresses with different capitalizations (e.g. test@here.com, Test@here.com) into a record (e.g. Contacts) may result in adverse behaviors.
- [82451](#): Removing the currency field from the Quotes record view layout may cause an unexpected error when viewing a quote and the Unit Price field to display blank for the quoted line items.
- [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.
- [82384](#): Deleting note records created from email attachments may not work as expected and continue to persist in the upload directory.
- [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.
- [80884](#): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message.
- [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.
- [79640](#): The Home (Sugar cube) icon shifts position in the navigation bar when "Allow users to select modules to appear in the navigation bar" is enabled.
- [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.
- [78890](#): Updating composer in instances with custom modules deployed from module builder may cause unexpected errors.
- [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.
- [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.
- [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.
- [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).

- [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.
- [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.

Developer

Please refer to the [Developer Blog in the SugarClub community](#) for a summary of the changes in version 11.2.0 (Q4 2021) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 11.2.x Supported Platforms](#).

Upgrade Paths

Sugar Ultimate, Sugar Enterprise, and Sugar Professional Upgrade Paths

Package	From Version(s)	MySQL
New Installs		<input type="checkbox"/>
11.0.2-to-11.2.0	11.0.2	<input type="checkbox"/>
11.1.0-to-11.2.0	11.1.0	<input type="checkbox"/>

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