Sugar Serve 12.1 (Q3 2022) Release Notes

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Overview

This document describes the changes and functionality available in Sugar Serve 12.1.0 (Q3 2022). Sugar 12.1.0 is only available for SugarCloud (Sugar-hosted SaaS) deployments.

For information about any changes to existing functionality in this release, you can also refer to the [What to Expect When Upgrading to 12.1](#) article.

Feature Enhancements

The following feature enhancements are included in Sugar Serve 12.1.0 (Q3 2022):

Look and Feel Enhancements

- [Report-viewing](#) **user experience improvements**
  - **Updated user interface**: The Reports viewer has a new, modern look and feel.
  - **Customizable view**: Chart, data table, and filter panels can be rearranged, resized, and collapsed for a personalized visualization experience.
  - [Visual representation of all filters](#): All filters on the report are displayed as a visual diagram instead of text to make understanding the applied filters more natural and intuitive.
- **Improved readability of emails in the Emails focus drawer**: The Email Record View dashlet has been expanded to allow users to see the full content of long emails in the Emails focus drawer.

Integration Enhancements

- [Dropbox cloud-drive integration](#): You can now interact with your Dropbox files via the Cloud Drive dashlet from any dashboard in Sugar.
- [DocuSign status notifications](#): Users receive a notification in the [Notifications](#) module whenever the status of a DocuSign envelope record assigned to them changes.
- [DocuSign Envelopes fields auditable](#): All fields in the DocuSign Envelopes module may now be enabled or disabled for auditing in [Studio](#).

Administration Enhancements

- **More columns available for sorting in Module Loader**: The Type, Version, Date Installed, and Date Published field columns can now be sorted in Admin > Module Loader.
- **More modules enabled by default for the mobile app**: The Document Templates, Documents, Escalations, Messages, and Purchases modules are now enabled by default in Admin > Mobile.

Reports

- **Exported CSV reports named after the report**: Like PDF report exports, CSV report files now use the report title as the file name instead of a generic name for all exports.

Fixed Issues

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

- 89821: In certain circumstances, editing and saving a record containing a large number of fields in the layout may fail to save with an error.
- 89642: Attempting to schedule advanced reports for email delivery does not work as expected.
- 89551: Attempting to download the Sugar Plug-in for Outlook from the Downloads tab in user preferences results in an error.
- 89308: When logged in to Sugar with the Spanish language, certain labels in the Calendar module are not translated to the default language.
- 89300: When logged in to Sugar with the French or Spanish language, renaming a module improperly causes the accent marks to be removed from the module names.
- 89290: Users assigned a role with the "Admin & Developer" access cannot access the Administration page as expected.
- 89259: The More option does not appear in the Case Timeline dashlet as expected to allow users to expand and see the full content.
- 89243: Users may improperly receive assignment notification emails for the MobileDevices module when the mobile app's push notification is enabled.
- 89170: In certain circumstances, changes to user roles may not get applied until a Quick Repair & Rebuild is performed in Sugar.
- 89121: Using dropdown-conditional record view layouts may cause calculated fields to break in the record.
- 89114: Funnel charts may not display properly when viewed in reports and dashlets.

- [89024](#): In certain circumstances, adding custom text fields to the Users module's edit and detail view layouts incorrectly displays the user's last name in the field.
- [88869](#): Mass record creation causes SugarBPM processes to overload and return errors resulting in missing processes.
- [88798](#): Creating reports using the "After" date range filter for Date fields may generate the report data incorrectly.
- [88725](#): The README text when installing a package Module Loder is difficult to read.
- [88720](#): When two users modify the same quote record and save, the second record save overwrites the first change instead of displaying the conflict resolution screen.
- [88695](#): The Advanced Search functionaity in the Users module is broken and does not work as expected.
- [88600](#): Using "email1" in a related() formula does not return the email address as expected in the calculated field.
- **[88550](#)**: In certain circumstances, having calculated fields based on the Project Tasks module may cause 500 errors in Sugar.
- [88532](#): When sending emails using an email template containing an attachment, the attachment does not get included in the email as expected.
- [88358](#): Installing packages via Module Loader may fail with a PHP fatal error.
- [88229](#): Triggering a SugarBPM Relationship Change event when creating a new record and relating it to another record may cause a 500 error that prevents the process from advancing.
- [88191](#): Active Subscriptions and Purchase History dashlets may behave differently in Record View dashboards and in the Renewals console.
- [87870](#): AutoIncrement fields are not available to define as a search filter in Admin > Studio.
- [87539](#): Sugar fails to import inbound emails that only contain recipients in the BCC field and in turn fails to import all subsequent emails in the same batch.
- [87318](#): In certain circumstances, web logic hooks may not pass the same arguments as standard logic hooks.
- [87306](#): The Date Installed column in Module Loader incorrectly displays the published date instead of the actual date the package was installed.
- [86849](#): In certain circumstances, refreshing the browser may improperly change the order of dashlets on the dashboard.
- [85880](#): Users cannot authorize their default outgoing email account when the "Allow users to use this account for outgoing email" option is disabled in Admin > Email Settings.
- [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.
- [85320](#): In certain circumstances, the SugarBPM process approval form may

not display values as expected for certain calculated fields.
- [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).
- [84691](): Uninstalling a package containing relationships in Admin > Module Loader causes invalid modules to become available for Sugar Portal.
- [83097](): Triggering a web logic hook generates different sets of data between the admin user and regular user who triggered it.
- [82757](): Variables for relate fields in process email templates do not get populated with a value in SugarBPM emails.
- [82657](): Process definitions with an Add Related Record action to create a record in a two-away module related to the target module (e.g., Calls, Meetings) results in an error when validated.
- [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.
- [81235](): Drilling through report charts may not work as expected for reports containing dropdown fields that have multiple dropdown options using the same display label.
- [80681](): Making changes to a report's relationship-based filters may result in an error when running the report.
- [80629](): Decimal fields with a NULL value in the database incorrectly display 0.00 instead of an empty value when included in reports.
- [80624](): Report charts may not display correctly in chronological order when the report is grouped by date fields (e.g., Date: Start Date) using the Year, Month, and Day format in Sugar.
- [80478](): SugarBPM processes may fail to send email notifications as expected to group users.
- [80379](): SugarBPM processes may improperly send multiple assignment notifications to users when records are reassigned to them.
- [78392](): Filtering reports using two DateTime fields may cause unexpected issues for the second DateTime field run-time filter.
- **[74635]()**: A Summation report that displays the SUM of decimal fields incorrectly rounds the total on the chart to a whole number instead of displaying numbers with decimal places.

Known Issues

The following known issues are present in version 12.1.0 (Q3 2022). [Case Portal users]() can use the following links for more details about each issue:

- [89915](): Clicking the Dropbox file name in the Cloud Drive dashlet does not display the preview of the file and opens a blank page instead. As a workaround, select the Copy Link option from the Actions menu to preview

the file in the browser.
- [89878](): The Forecast Bar Chart dashlet in the Forecasts module does not display any data for individual sellers.
- **[89457]()**: The search bar in SugarLive does not work in instances that include Hint (e.g., Sugar Premier instances).
- [89328](): Filtered subpanels in the modules' record view (e.g., Cases) cannot be reverted to show all related record subpanels as expected.
- [89269](): Scheduling Summation With Details reports to be delivered as both a PDF and CSV file causes the scheduled report to become disabled.
- [89167](): In certain circumstances, duplicate numbers may improperly appear in the X and Y-axis of the report chart.
- [89078](): In certain circumstances, the navigation bar may not display correctly after upgrading Sugar. 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.
- [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.
- [88366](): When performing an advanced search in legacy modules (e.g., Users), the Status field may default to "NULL" causing search to not work as expected.
- [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.
- [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.
- [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 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.
- [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 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](): 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.
- [85246](): Errors may get logged in the system after upgrading or installing Sugar when certain license data is missing.
- [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.
- [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 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.
- [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.
- [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 Sugar. 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 12.1.0 (Q3 2022) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 12.1.x Supported Platforms](#).

Upgrade Paths

Sugar Serve and Sugar Sell Upgrade Paths

The following upgrade paths apply to Sugar Serve and Sugar Sell Premier, Advanced, and Essentials:

Package	From Version(s)	MySQL
New Installs		☐
12.0.0-to-12.1.0	12.0.0	☐

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