Sugar Sell 10.1.0 (Q3 2020) Release Notes

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Overview

This document describes the changes and functionality available in Sugar Sell 10.1.0 (Q3 2020). Sugar 10.1.0 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 10.1](#) article.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in this release:

- **Purchases and Purchased Line Items Features**

    - [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 while supporting post-sale operations.
    - [Automatic purchase generation](#) : Purchases and purchased line items are automatically generated for "Closed Won" opportunities with revenue line items.
    - [Active Subscriptions dashlet](#) : The Active Subscriptions dashlet is now based on purchases and purchased line items.
- **Opportunities and Revenue Line Items Features**
    - [Managing revenue line items at the opportunity level](#): Expected close date, sales stage, and service start date can now be set at the opportunity level and pushed to all open related revenue line items.
    - [Configurable Revenue Line Items fields during opportunity creation](#) : The Revenue Line Items subpanel in the opportunities create view now respects the customizations made in Studio for the Revenue Line Items subpanel layout in the Opportunities module.
    - **Discounting revenue line items in percentage** : Revenue line items now support discounts in percentage (e.g. 20.00%).
- **Negative quantity amounts** : Support for negative "Quantity" values, which can be used for credits or price adjustments, has been added to the Revenue Line Items and Quoted Line Items modules.
- **Workforce Management Features**

- **Shifts and Shift Exceptions** : The Shifts and Shift Exceptions modules have been added to manage employees' regular working hours as well as exceptions to their working hours (e.g. paid time off), which can be used in round robin assignments in SugarBPM.
      - **Round robin by availability** : Round Robin actions can now assign records based on the availability of users according to their shifts, shift exceptions, and holidays.
- **Console Management Features**
      - **Add and remove dashlets in module tab drawers** : The module tab drawers (e.g. Account Detail drawer) in the Renewals Console can now be configured to add or remove dashlets.
      - **Module tab list configuration**: Administrators can now designate which fields to display as columns as well as the left-to-right order of the field columns in the module tab's list view when configuring the module tab lists.
      - **Module tab list preview** : The new preview table in the Console Settings window automatically updates in real-time to reflect your field selections and the designated order of the field columns configured in the Columns list.
- **Record View Dashlet Features**
      - **Additional supported modules**: The Record View dashlet can now be added for additional Sidecar modules (Quotes, Calls, Meetings, Opportunities, Revenue Line Items), including custom modules.
      - **Record View dashlet layout configurable for all supported modules**: The Record View Dashlet layout can now be configured in Studio for all supported Sidecar modules, as well as custom modules.
- **Comment Log Features**
      - **Email notification on mentions in comment log entries**: Users now have the option to be notified via email when they are mentioned in a comment log entry by enabling the Email on Mention checkbox in their profile.
      - **System Comment Log Email Notification template** : Administrators can configure the comment log email notification template via Emails > View Email Templates.
- **Additional configurable system email templates** : Additional system email templates are now available to configure via Emails > View Email Templates: "Assignment Notification Emails", "Call Notifications Emails", "Meeting Notifications Emails", "Scheduled Report Emails".
- **SugarBPM list view refresh** : The Refresh button has been added to the list views of all SugarBPM modules to allow users to quickly refresh the list view results without having to reload the browser.
- **Tile view filter refresh**: The Refresh button has been added to the tile view to allow users to quickly reapply filters after making changes to the displayed records without having to reload the browser.
- **Auto-focus cursor on first field in record view** : When creating or editing records in Sidecar modules, the cursor is now automatically focused

on the first field (e.g. Subject) in the record view layout.

- [Clickable hyperlinks in text area fields](#) : Hyperlinks in text area fields are now clickable and will open the link in a new tab.
- **Managing Employees** : SugarIdentity-enabled instances now support duplicating and [deleting](#) records in the Employees module.

Fixed Issues

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

- [84959](#) : Clicking on a record's direct link from an email may not open up the record in Sugar as expected if the instance is SugarIdentity-enabled.
- [84945](#) : The Active Subscriptions dashlet is improperly available to add in Sugar Enterprise.
- [84693](#) : Sugar may improperly truncate field labels in the record view layout when resizing the browser window.
- [84565](#) : Sugar instances using SugarIdentity cannot access custom API endpoints on custom API platforms and may result in an error.
- [84488](#) : If the number of active users exceeds the license limit for a SugarIdentity-enabled instance, deactivating the additional user(s) in the Cloud Settings console may not sync the change to Sugar as expected.
- [84475](#) : Process definitions with multiple, exclusive Start events that have the same "applies to" conditions only evaluate one Start event, based on the order the Start events were edited.
- [84433](#) : API requests no longer fail due to global search indexing deadlock.
- [84365](#) : In certain circumstances, users may experience performance issues after upgrading to Sugar 10.0.0.
- [84283](#) : Fields that a user does not have access to based on their assigned license type improperly displays in the module's layouts (e.g. record view) in Sugar.
- [84076](#) : In certain circumstances, users may run into unexpected errors when trying to access certain modules and/or notice modules missing from the navigation bar.
- [84014](#) : When an opportunity's expected close date is updated from tile view, the Sales Stage and Expected Close Date fields are improperly updated on related revenue line items that are already closed.
- [83858](#) : The Product Catalog Quick Picks dashlet improperly truncates product names containing more than 25 characters.
- [83843](#) : Quoted line items added to existing quotes using the Product Catalog dashlet may be assigned to the incorrect user.
- [83774](#) : In certain circumstances, users may experience unexpected errors while utilizing Sugar.

- [83350](#) : Saving a record containing tabs with required fields in the layout may result in unexpected behavior when a validation error occurs due to incomplete fields.
- [82581](#) : An unexpected error message may appear when attempting to import in a person-type module (e.g. Contacts, Leads) after upgrading to Sugar 9.0.0.
- [82542](#) : In certain circumstances, calculated fields in the Opportunities module containing rollupConditionalSum() functions for revenue line items may not calculate as expected and result in unexpected behavior.
- [82495](#) : Adding quoted line items to a quote incorrectly sends an assignment notification to the current user who created and is assigned to the record.
- [82484](#) : Attempting to undo an import may not work as expected and fail for modules containing custom fields.
- [82464](#) : When the "Round Numbers Over 100000" option is enabled in the report's chart option, hovering on a segment of the generated report chart may not display the correct value for Integer fields as expected.
- [82041](#) : Report chart values may not render correctly for Integer fields when using a period as the 1000s separator in the user's profile.
- [81922](#) : In certain circumstances, generating a Summation With Details report grouped by "Week: Start Date" may not display the records (e.g. meetings) grouped correctly if the date range spans multiple years.
- [81328](#) : Changes made to custom relate fields that are marked as "Audit" in Admin > Studio do not get recorded in the audit log as expected.
- [80992](#) : The "Loading..." message may improperly appear in the Guests panel for call and meeting records.
- [80936](#): When updating records via import, the "Date Modified" and "Modified By" fields may not update as expected.
- [80672](#) : Renaming modules using a different language (e.g. German) than the language (English (US)) you are currently logged into Sugar with may result in unexpected behavior with the module labels.
- [80376](#): Uninstalling custom modules from Sugar may not delete the associated workflows as expected.
- [80279](#) : A number of fields (e.g. Forecast, Quantity, Expected Close Date) cannot be removed from the Revenue Line Items subpanel layout for Opportunities in Admin > Studio.
- [79938](#) : Calculated fields containing a dependent dropdown list may not be calculated properly and display an incorrect value.
- [79052](#) : A blank space may improperly appear in the module's record view in place of any dependent fields that are hidden in the layout.
- [76271](#) : When creating a call or meeting record with repeat type set to "Weekly", the "Repeat on Days of Week" field incorrectly defaults to the current day that the record is being created instead of populating based on the "Start Date".
- [76180](#) : Clicking the hyperlinked number (e.g. "6+") in a subpanel's record count may improperly cause the record count to disappear if the subpanel

is in a collapsed state.

- [73689](): The user-defined list view column widths may not be preserved if the browser window is resized or the list view's intelligence pane is opened/closed.

Known Issues

The following known issues are present in version 10.1.0 (Q3 2020). [Case portal users]() can use the following links for more details about each issue:

- [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.
- [85000]() : When upgrading a package using Module Loader, an additional progress bar may display as incomplete even though the package installation completed successfully.
- [84988]() : The Opportunity's Expected Close Date "Calculated Value" is able to be updated in Studio, overwriting what is calculating programmatically in the back end.
- [84987]() : User assigned to the Service Console and/or Renewals Console cannot configure the module tab drawer as expected to add or remove dashlets.
- [84942]() : In SugarBPM, Round Robin actions do not correctly calculate the required shift availability when assigning records by users' availability.
- [84926]() : In the Active Subscriptions Dashlet, the "Total" displays the Euro calculated revenue amount with the US dollar sign when a purchased line item is saved with Euros as the currency.
- [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.
- [84808]() : Sugar improperly allows custom fields to be created using the same name in different modules which causes errors when reindexing global search.
- [84677]() : In certain circumstances, the unsaved changes warning message may improperly display when users attempt to navigate away from the quote record.
- [84666]() : Upgrades may fail when a customization uses deprecated chart libraries.
- [84605](): Fillers added to Record View layouts in Studio are ignored and the

fields below them are shifted upward.

- [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). As a workaround, remove the filler next to the dependent dropdown field(s) in Admin > Studio.
- [84551](#): Legacy workflows created in Sugar Enterprise 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.
- [84233](#) : Trying to click the records (e.g. calls) in the Planned Activities dashlet may not work as expected and a Download icon may improperly appear instead.
- [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.
- [83994](#) : In certain circumstances, campaign emails sent by regular users may not send as expected and result in unexpected errors. As a workaround, send the campain as an Admin user or do not click the Delete Test Entries button when sending the campaign as a regular user.
- [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.
- [83847](#) : For instances that only have Sugar Sell and/or Sugar Serve license types, the "Workflow Management" (legacy workflow) link improperly appears on the Admin page.
- [83839](#) : Changing a user's license type from Sugar Enterprise to Sugar Sell and/or Sugar Serve may cause the user to be unable to log into Sugar.
- [83796](#) : SugarBPM processes always run after module-level logic hooks and it is not possible to configure them to run before logic hooks.
- [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.
- [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.
- [83433](#) : The total record count in the list view may not respect the user's

team membership and incorrectly display the total count of records in the module instead of the total count of records that the user can see.

- [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.
- [83301](#) : In certain circumstances, the tooltip (e.g. Create) may continue to persist improperly while navigating through Sugar. As a workaround, reloading the web browser will clear the tooltip from the screen.
- [83178](#) : When administrating Sugar Portal, enabling or disabling the "Enable search before opening a case" option does not update the user interface as expected. As a workaround, a Quick Repair and Rebuild must be run for the change to take effect.
- [83091](#) : Report chart drill-through may not work as expected and display incorrect data for users in different timezones.
- [82970](#) : Deactivating the default admin user (user id = '1') via the Cloud Settings console may not work as expected and the user's status incorrectly remains "Active" in Sugar.
- [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.
- [82899](#) : Peforming a recipient search using an email address does not return any records as expected for SugarBPM's Send Message events. As a workaround, manually enter in the full email address and press "Enter" or use the selection option to choose the recipient.
- [82843](#) : Revalidating the license in Sugar may not work as expected and result in an error for customers using a proxy server.
- [82840](#) : Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [82813](#), [81877](#): 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.
- [82810](#) : Fields based on non-existent or improperly defined custom field types may cause upgrades to fail.
- [82767](#): Creating fields in Studio may not work as expected and result in an error if "Tracker Actions" is enabled in Admin > Tracker. As a workaround, disable "Tracker Actions" in Admin > Tracker.
- [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.
- [82693](#) : When importing contacts mapped to new accounts, users may experience unexpected behavior if the system detects an error on the file. As a workaround, import the new accounts into Sugar first then import the

contacts.
- [82584](#) : Custom user fields and stock fields which do not appear in SugarIdentity cannot be imported in Sugar instances using SugarIdentity as the Import Users option is not available.
- [82559](#) : Certain customizations in Sugar may cause the upgrade to fail.
- [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.
- [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.
- [82377](#) : SugarBPM module field evaluations improperly allow the selection of the "changes", "changes to", and "changes from" operators when "All Related Records" is enabled. To avoid unexpected behavior, utilize the "is", "is not", or other non-change operators when evaluating all related records in process criteria.
- [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.
- [82254](#): Emails may fail to send as expected if it uses an email template containing an attachment that is already attached to an existing note record. As a workaround, add the code described in the defect's description or delete the existing email template and create a new one with a fresh upload of the file attachment.
- [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.
- [82038](#) : Clicking on a Home page tab (e.g. Sales) or attempting to sort by a field column on the Legacy dashboard may not work as expected and result in an error.

- [81999](#): Users may be unexpectedly logged out when requests with out-of-date user_hash data are sent to the server in close succession.
- [81929](#) : Report chart drill-through may not work as expected and display an error message (No data available) for reports using the Product Catalog module.
- [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.
- [81335](#) : Importing records in Sugar may fail with a PHP error if the upload directory is not set to the default upload folder in config.php.
- [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.
- [81152](#) : Event-based gateways improperly consider activity elements to be complete if the activity gets reassigned to another user via "Select New Process User".
- [81151](#) : Report chart drill-through may not work as expected when the report is filtered by a checkbox field.
- [81121](#) : In certain circumstances, the Gantt chart in the Projects module may display an incorrect year of "1907" for the date range if the date format in the user's profile or system locale settings is set to "MM/DD/YYYY". As a workaround, change the date format in the user's profile or system locale settings to "YYYY-MM-DD", "YYYY/MM/DD", or "YYYY.MM.DD".
- [81051](#): If a calculated Date field is set to null, the value is incorrectly displayed as an invalid date in reports.
- [80968](#): It may not be possible to disable SAML authentication via the user interface after certain actions have been performed on your Sugar instance.
- [80884](#): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message.
- [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.
- [80730](#) : Reports without charts are improperly available to select in the Saved Reports Chart dashlet.

- [80726](): Dropdown lists created in Module Builder incorrectly allow certain special characters in the item name; modules containing such a list cannot be deployed.
- [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.
- [80583]() : Attempting to erase fields (e.g. Description) marked as "Personal Information" from the Opportunities module do not work as expected and result in a 500 error.
- [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.
- [79752]() : When working with SugarBPM process business rules on Internet Explorer 11, you cannot delete columns from rules in the Rules Builder. As a workaround, please use another supported browser.
- [79715]() : The Follow button does not appear in the Contracts record view as expected.
- [79712]() : The "Sign" and "Get latest" links do not appear as expected in the Documents subpanel of the Contracts module.
- [79704]() : When logged into Sugar with certain languages (e.g. Russian), the list view's Record Actions menu may not appear as expected for some modules (e.g. Dashboards).
- [79698]() : When merging records, fields that are required under certain conditions are required even if the conditions have not been met.
- [79686]() : The List Order field in the Contract Types, Manufacturers, Tax Rates, and Shipping Providers modules does not control the order in which the options are listed in the corresponding fields (Type Name, Manufacturer Name, Shipping Provider, Tax Rate) for the Contracts, Quotes, and Product Catalog modules.
- [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.
- [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.
- [78719](#) : Users may encounter an unexpected behavior when accessing Sugar if the Date Modified field in the user account contains the same value as another user.
- [78709](#) : Users assigned a role with Delete, Edit, or Export permission set to "Owner" may improperly be restricted from downloading and emailing PDFs.
- [78667](#): Attempting to scroll in Sidecar modules (e.g. Meetings) may not work as expected when logged into Sugar on iPad.
- [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.
- [78580](#) : Saving a record without completing the Salutation field which is marked as required in Admin > Studio may result in unexpected behavior.
- [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.
- [78487](#) : When renaming modules via Admin > Rename Modules, only the most recent changes will remain and any previous updates to module names will be incorrectly removed after save.
- [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.
- [78315](#) : The same Process ID may be used for multiple processes if a process definition's Start condition is triggered by simultaneous events.
- [78128](#) : For dropdown list values, a value's Display Label will improperly revert to a blank value if its Item Name is 0 (zero).
- [77780](#) : Instances using MS SQL may see unexpected behavior due to a lack of ORDER BY clause in the list view query.
- [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.

- [77302](#) : Upgrades may fail due to queries posted by the upgrade exceeding the max_allowed_packet database setting.
- [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.
- 72625, 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.
- 72581 : Attempting to merge records in modules containing required dependent fields may not work as expected.
- 71950 : Adding TinyMCE to a TextArea-type field (e.g. Description) may cause the field to not display properly in record view when accessing Sugar via certain browsers (e.g. Firefox).
- 71733 : Printing archived emails via the browser's print option may not display correctly.
- 70940 : Attempting to disable the SAML authentication via Admin > Password Management may not work as expected if the authenticationClass property in config.php has been set to SAMLAuthenticate.
- 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.
- 68461 : Searching by non-primary email addresses in the module's list view (e.g. Accounts) does not pull up results as expected.
- 68112 : Matrix-type reports display incorrectly when exported to PDF.

Developer

The following changes in this release may affect developers in version 10.1.0 (Q3 2020):

- **New REST API Endpoints** : The following new REST API Endpoints have been added:
    - PUT/POST - /rest/v11_9/ConsoleConfiguration/config
        - Allows users to customize the fields in multi-list view.
        - Added 2 new attributes. For an example of the 2 new attributes in the payload, please refer to the [Sugar 10.1 (Q3 2020) Customization Guide](#)
            - **Labels** : This attribute contains a list of modules. Each module contains a list of labels to be created in the SugarCRM system.
            - **Viewdefs** : This attribute contains a list of modules. Each module contains a multi-line-list view metadata. The metadata will be saved into the custom directory as a physical view metadata file. The file will then be used when the multi-line-list view is loaded.
    - GET - /rest/v11_9/ConsoleConfiguration/default-metadata
        - Retrieves multi-line-list metadata.
        - Required parameters:
            - modules: String. Comma separated module names. For example: Accounts,Opportunities.
            - type: String. The type of the desired metadata. The following types will be supported: 'filter', 'layout', 'menu' or 'view'.
            - name: String. The name of the metadata. For example, 'list', 'record', or 'multi-line-list'.
- **Module Loader functions enhancements** : The following enhancements have been made to Module Loader functions (UI and API):
    - All package checks have been moved into the upload step. This has INCREASED the upload step time by 59%
    - Staged packages list rendering is decreased by 47.9%!
    - Installed package list rendering is decreased by 22%
    - Install package time decreased by 10%
    - Uninstall package time decreased by 5%
    - API no longer ignores uninstallable flag
    - Uninstall API endpoint now respects remove_tables flag
    - **When a module is uninstalled, any legacy workflows it was based on will be deleted**
    - API error handling now returns a JSON object with error descriptions

```json
{
    "error": "upload_package_error",
    "error_message": "Invalid Package",
    "error_description": {
        "file": {
            "Files/test-pre-exec.zip": [
                "Invalid file extension "
            ]
        }
    }
}
```

- **"Update Open Revenue Line Items" for opportunities** : When editing opportunities with revenue line items, the Expected Close Date, Sales Stage, and Service Start Date fields appear with an "Update Open Revenue Line Items" checkbox which is disabled by default. Each time you enter the fields in edit mode, the "Update Open Revenue Line Items" checkbox can be enabled to push the updated values to all open related revenue line items.
  Note: When an opportunity has no open revenue line items, the Sales Stage and Expected Close Date fields will not be editable.
- **Discounting revenue line items in percentage** : Revenue line items now support discounts in percentage (e.g. 20.00%).
    - The revenue line item's Discount field now match the look and feel of the quoted line item's Discount field on the quote worksheet.
- **Negative quantity amounts** : Support for negative "Quantity" values, which can be used for credits or price adjustments, has been added to the Revenue Line Items and Quoted Line Items modules.
- **Record View dashlet available for all supported modules** : The Record View dashlet can now be added and configured for all supported Sidecar modules (e.g. Calls, Meetings, Quotes), including custom modules.
    - The Record View Dashlet layout can be configured in Studio for all supported Sidecar modules, as well as custom modules.
    - The Record View Dashlet layout is inherited from the Record View layout by default.
- **Configuring the console's tabbed list views** : Administrators can now designate which fields to display as columns in the module tab's list view (e.g. Accounts tab's list view for Renewals Console) by dragging and dropping the desired fields from the Available Fields list to the Columns list in the Console Settings window. You can also change the left-to-right order of the field columns in the module tab's list view when configuring the module tab lists.
- **Validate user IP address setting disabled by default** : The "Validate user IP address" setting in Admin > System Settings is now disabled by default for new installs only. For existing customers, whatever setting is in place prior to upgrade will not be changed.
- **License-restricted fields for Studioconfiguration** : Fields that are restricted to specific license types (e.g. Sugar Sell, Sugar Serve) can only

be added to layouts in Studio by an Admin user with the appropriate license type. They can remove these fields if they are already on the layout, but cannot re-add them after saving and deploying the change.

- **Configurable system email templates** : All system email templates are now configurable via Emails > View Email Templates including: "Assignment Notification Emails", "Call Notifications Emails", "Meeting Notifications Emails", "Scheduled Report Emails", etc.
- **Email notifications for comment log mentions** : When a user is mentioned in a comment log entry, they will now receive an email notification if the Email on Mention option is enabled in their profile.
- **User-defined list view column widths preserved** : The user-defined list view column widths will be preserved when resizing the browser window or opening/closing the list view's intelligence pane.
- **Auto-focus cursor on first field in record view** : When creating or editing records in Sidecar modules, the cursor is now automatically focused on the first field (e.g. Subject) in the record view layout.
- **Clickable hyperlinks in text area fields** : In text area fields, URLs will be automatically hyperlinked upon save. This is using a simple regex for display only. No data is being manipulated in the DB.
- **Duplicating or deleting employee records** : For SugarIdentity-enabled instances, administrators can once again duplicate and delete non-user employee records.
- **Sugar Connect section removed from Admin page** : The "Sugar Connect" section has been removed from the Admin page to eliminate confusion with the "Sugar Connect" product. The links (e.g. License Management, Sugar Updates) in the Sugar Connect section have been moved to the bottom of the System section.
- **New data center location for Sugar Sell and Sugar Serve** : A data center will be added for the UK (London) region. It should be online mid-July 2020.
- **New data center location for Sugar Integrate** : A new data center has been added for the AU (Sydney) region. This is solely for Sugar Integrate.

Supported Platforms

For information on supported platform components, see [Sugar 10.1.x Supported Platforms](#).

Upgrade Paths

Sugar Serve and Sugar Sell Upgrade Paths

Package	From Version(s)	MySQL

New Installs			
10.0.0-to-10.1.0	10.0.0		

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