Sugar Sell 9.2.0 Release Notes

Sugar Sell 9.2.0 Release Notes

Overview

This document describes the changes and functionality available in Sugar Sell 9.2.0. Sugar 9.2.0 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 9.2](#) article.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in this release:

- **Business Centers** : Relationships to the Business Centers module have been added to Contacts, Leads, and Users, allowing business hour calculations to be leveraged in sales-focused SugarBPM processes (e.g. lead routing).
- **SugarBPM Stock Process Definitions** : Sugar Sell includes several [stock process definitions](#) which can be modified to suit your needs:
    - **Automatic Forecast Update** : These templates automatically update the related opportunity or revenue line items when a quote is closed.
    - **Lead Routing** : This template automatically routes leads to sales representatives in the appropriate territory and sends the new owner a task due in one business day and an email notification.
    - **Quote Discount Approval** : This template requests approval from the sales representative's supervisor when a quote is negotiated with a discount greater than 20%.
    - **Stagnant Opportunity Reminder** : These templates send an email reminder to sales representatives when their open opportunity is 15 days away from its expected close date and if the opportunity does not close on time.
- **SugarBPMand Emails** : Shared email accounts can now be used as the From address in emails sent using SugarBPM [Send Message](#) and End events.
- **Managing Employees** : SugarIdentity-enabled instances now support creating and editing non-user employee records.
- **Mass updating user license types** : Administrators now have the ability to view and mass update the License Type field on users in the Users list

view.

- **Sugar Portal enhancements** : The following improvements have been made to Sugar Portal which, in Sugar Sell, is limited to knowledge base article access:
  - **Contact creation via portal registration** : Portal registration submission now creates a new contact record in Sugar. The contact's Lead Source field is automatically set to "Support Portal User Registration".
  - **Portal configuration** : Administrators now have additional configuration settings such as company contact information and logo.
  - **Records displayed in portal by default** : Notes created in Sugar will automatically be visible in the portal as the Display in Portal checkbox is now enabled by default in the system.
  - **Portal User Company Name field** : The Portal User Company Name field has been added to the Contacts module and will display the name of the company the customer enters when signing up for the portal.
  - **Enhancements for Sugar Portal Users** : Sugar Portal users now can preview records, reset their passwords, and choose their own username and password during registration.

Fixed Issues

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

- 82929 : When instances are upgraded to 9.1.0 around the same time their Sugar license is renewed, certain modules/functionality, including the Admin page may unexpectedly become inaccessible to users.
- 82874, **82867** : Lead conversion may not work as expected in certain circumstances.
- 82848 : Employee records cannot be created for instances that use SugarIdentity.
- 82797 : Modifying the license type of system administrator users may prevent other users from accessing functionality their license types should allow.
- 82173 : User sessions that expire while accessing a Legacy module (e.g. studio) may cause the cross-site forgery error message to appear.
- 82039 : Global search may not work as expected when searching for text in the Description field that contains more than 32766 characters. To see the effects of this change, admins need to re-index their instance.
- 81693, 81003, **80736** : In certain circumstances, the Action element in a process definition may not preserve the configurations made in the Teams

field as expected.
- [81646](#) : Audit log entries generated from a SugarBPM process definition may display an incorrect source value.
- [81544](#) : When viewing additional details of an activity (e.g. meeting) via the calendar, the datetime format may not respect the system or user locale settings and incorrectly display the values using UTC.
- **[80829](#)** : Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [80717](#) : Calculated fields containing a count() function may return incorrect results when used in conjunction with the approval process in a process definition.
- [80676](#): The SugarBPM process definition may not trigger as expected when the condition for the Start event uses the "Changes from" operator.
- [79469](#), [79724](#) : When a web-to-lead form is created without including a redirect URL, the visitor may improperly get directed to an error page upon submitting the form.
- [77141](#) : A user assigned a role with access to the Forecasts module disabled may not be able to create opportunity records.
- [74097](#) : Changing the instance's opportunity model from "Opportunities and Revenue Line Items" to "Opportunities" may cause data to not display correctly when viewing the campaign's ROI.
- [66086](#) : Embedded images may not display properly in archived emails.

Known Issues

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

- [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.
- [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.
- [82897](#) : The dashboard metadata from a previous version of Sugar may not be compatible after upgrading to version 9.1.0 causing a 500 error to occur in certain circumstances. As a workaround, please contact Sugar Support.
- [82756](#) : Upgrades fail when a filter exists for a module that has been removed.
- [82589](#) : Setting the default date format in the admin's profile to "mm/dd/yyyy" may cause the time periods on the Forecasts Settings page to incorrectly display "Invalid date".

- [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.
- [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. Users can close the error message to proceed with the import.
- [82559](#) : Certain customizations in Sugar may cause the upgrade to fail.
- [82486](#) : Upgrades may fail when a custom field has conflicting field types defined.
- [82484](#) : Attempting to undo an import may not work as expected and fail for modules containing custom fields.
- [82475](#) : When saving a new quote record assigned to another user, the Assigned To field may incorrectly revert back to the current user who created the record.
- [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.
- [82455](#) : Quoted Line Items subpanels on record views of modules with no currency fields may not load as expected.
- [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.
- [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.
- [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.

- [81908](#) : Multiple edits to a record may cause redundant elastic search reindexes resulting in performance degradation.
- [81877](#): Full-text search re-indexes performed from the command line may run out of memory when run on very large data sets.
- [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.
- [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.
- [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.
- [81021](#) : Creating report schedules via duplication copies the related user recipient, preventing users from copying other users' report schedules for themselves.
- [80968](#): It may not be possible to disable SAML authentication via the user interface after certain actions have been performed on your Sugar instance.
- [80966](#): Records with a custom calculated Datetime field cannot be saved if the calculation results in a null value.
- [80936](#): When importing records makes changes to an existing record, the Date Modified field is not updated.

- [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.
- [80799](#): Upgrading to Sugar 8.0.x may fail if you set the acl_actions table to MyISAM. As a workaround, set the acl_actions table to InnoDB before upgrading.
- [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.
- [80708](#): If the cache or uploads folders are moved outside of the Sugar directory, users may experience unexpected behavior when accessing Sugar or when importing CSV files.
- [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.
- **[80430](#)** : On-Demand sessions may time out with a 500 error due to a database issue.
- [80376](#): Uninstalling custom modules from Sugar may not delete the associated workflows as expected. As a workaround, remove the affected workflow via the database.
- [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.
- **[79925](#)** : Email messages that have been archived to Sugar and contain embedded or inline images show empty containers instead of images in the email's record view and preview.
- **[79767](#)** : SugarBPM processes do not send email messages to contact recipients as expected. As a workaround, manually type the contact's email address in the Send Message event's recipient field and press "Enter".
- [79763](#) : The Account Name field does not get populated as expected for quoted line items related to a quote.
- [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"
```

- [74539](#) : Custom fields may not display as expected when previewing call and meeting records via the intelligence pane.
- [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
```

- [73689](#): When users adjust the list view or subpanel column widths, the user's preferred column size may not be preserved if the browser window is resized.
- [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.
- [67886](#) : During the lead conversion process, creating a new opportunity record does not automatically get associated with the revenue line item (if enabled) causing issues completing the lead conversion. As a workaround, create the opportunity record during lead conversion and then manually associate the opportunity to the revenue line item after.

Developer

The following changes in this release may affect developers:

- jQuery was upgraded to version 3.4.1 and jQuery Migrate was upgraded to version 3.1.0.
- The old portal FilterView and PortalListTop UI components were deprecated.
- By default, record, preview, and list views in portal will no longer show the user who created, modified, or is assigned to a record (the date created and date modified will still be shown, just not who did the

creating/modifying). Administrators can add these fields back via Admin > Sugar Portal > Layouts, but if they do so, the fields will not be hyperlinked.

- Moment.js was upgraded to 2.24.0. We do not expect any backward-compatibility concerns as a result of this upgrade.
- A new field called "Portal User Company Name" has been added to the Contacts module. It will appear on the record view if portal is enabled. The field's database name is portal_user_company_name. It is a text field.
- In portal, when creating a note or an attachment from the Cases record view, the modal dialog has been replaced with a drawer.
- Portal users are now able to use Preview to view records to which they have access. The fields available for preview display can be controlled with portal configuration.
- For new installs and upgrades "Display in portal" will be enabled by default for cases, notes, and bugs. Admins can disable the default setting in Studio field-level configuration.
- The portal's user interface has undergone several changes:
    - It is now possible to customize both the image that appears in the top left (where the Sugar logo used to be) and the one that appears on the login page. This configuration is available via Admin > Sugar Portal > Configure Portal. The config option for this value is logomarkURL.
    - Quick Create and Global Search were both removed from the portal header.
    - The portal footer was deleted entirely, including the Tour and Support links.
    - View.Views.Portal.FooterActionsView is deprecated as of 9.2 and may be removed in 10.2 and later.
- A new field called with the database name entry_source has been added to the Contacts module. Possible values for the new field are internal or external. New portal contacts are automatically set as external. The field is neither viewable nor editable by portal users.
- A new dropdown option has been added to the Source field used on Bugs and Cases: "Portal". This means that the record in question originated from the Sugar portal. When a case (but not a bug) is created from the portal, this source field is automatically set.
- Portal signups will no longer create lead records by default. They will create contact records.
- New portal contacts are required to provide a last name, a unique username, email address, and password. They may provide a first name and a "Company Name". Company Name is a new field that hints at which Account record the Contact should be related to, but it is just raw text and does not automatically create any relationships.
- It is possible for the Admin to configure which modules are shown in the megamenu for portal users. This can be done via Admin > Sugar Portal > Configure Portal. By default, this list contains the Cases and Knowledge Base modules, in that order. The Bugs module can also be added. Removing

a module from the megamenu does not make it inaccessible to portal users; they can still visit it if it is a portal-enabled module and they know the URL.

- It is now possible to customize metadata for portal by way of the custom directory. The method is exactly the same as for customizing the base app, but you will have to change "base" in file paths and viewdef definitions to "portal". If you create metadata for a non-portal module, you will be able to further customize it through Admin > Studio > Sugar Portal > Layouts.
- Previously, only the first 32,677 characters of large text fields were searchable. This limit has been removed. Note this change may not be noticeable until a full re-index is completed.
- Various aspects of the Bootstrap library have been updated in 9.2.0:
    - affix: 3.4.1
    - alert: 3.4.1
    - button: 3.4.1 (and also partially forked)
    - carousel: 3.4.1
    - collapse: FORKED, remains at 2.2.1
    - dropdown: FORKED, remains at 3.0.0
    - modal: 3.4.1
    - popover: 3.4.1
    - scrollspy: 3.4.1
    - tab: 3.4.1
    - tooltip: 3.4.1
    - transition: 3.4.1
- It is no longer possible to view Personally Identifiable Information (PII) from the portal's user profile screen. Viewing PII of a Contact (or Lead, or Account, etc.) in the main app remains possible and nothing has changed in this regard.
- Administrators can now choose to enable a case-deflection feature for portal. The new config setting is called caseDeflection and is enabled by default. Any change to this value will require a Quick Repair and Rebuild.
- View.Views.Base.AlertView#close has been deprecated in 9.2.0. Its functionality was subsumed by dispose().
- Administrators can specify one or more contact methods for customers trying and failing to reset their passwords to get in touch with a portal administrator. The options are a phone number, an email address, and an arbitrary URL. It is required to have at least one of these values set.
- The portal list view now has a filter. If a filter had already been added to the portal list view via customization, the view will now show both. Therefore, the custom filter would need to be removed.

Supported Platforms

For information on supported platform components, see [Sugar 9.2.x Supported Platforms](#).

Upgrade Paths

Package	From Version(s)	MySQL
New Installs		☐
9.0.2-to-9.2.0	9.0.2	☐
9.1.0-to-9.2.0	9.1.0	☐

Last Modified: 2020-07-16 21:36:44