Sugar Professional 9.1.0 Release Notes

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Overview

This document describes the changes and functionality available in Sugar Professional 9.1.0. Sugar 9.1.0 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 9.1](#) article.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in this release:

- **Email Filters** : The Emails list view can now be filtered using the From, To, Cc, Bcc, and [Direction](#) fields.
- **[Shared filters for List View dashlets](#)** : Custom filters applied to List View dashlets are now shared with all members of the associated team(s) that have access to the shared dashboard.
- [Comment Log](#) : The Comment Log field has been enhanced with the following functionality:
    - URLs in Comment Log entries are now clickable and will open the link in a new tab.
    - Users can now insert a link to a Sugar record in the form of a clickable pill in Comment Log entries.
    - Users can now be tagged in Comment Log entries, which causes the tagged user to receive a notification in Sugar.
- [SugarCloud Insights](#) : The new SugarCloud Insights page allows administrators to easily monitor their instance's database and file system storage usage, license usage, as well as gain access to PHP error logs and access logs.
- [Activity Stream Purger scheduler](#) : The Activity Stream Purger scheduler has been added and can be enabled to prune activity stream records that are older than 6 months from the activities table.
- [User License Type](#) : A new field on user records, License Type, allows administrators to grant each user access to one or more products including SugarCRM's new offerings, Sugar Sell and Sugar Serve.
- **StartTLS for LDAP** : Sugar now supports StartTLS encryption for LDAP.

Fixed Issues

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

- [82682](#), [81111](#) : In certain circumstances, changing the email address on a user record may incorrectly update the email address for another user as well.
- [82494](#) : The project's Gantt chart may not display as expected if the related project tasks are assigned to an individual (e.g. Sugar user) via the Resource field.
- [82467](#) : Sugar instances may become inaccessible in certain circumstances due to a permission error.
- [82429](#) : Upgrading to Sugar 9.0.0 may revert the database field length for dropdown, radio, and image fields back to the default value which may result in an upgrade failure.
- **[82320](#)**, [72745](#): In certain circumstances, inbound emails may not import as expected and cause the Check Inbound Mailboxes scheduler to fail.
- [82301](#) : Testing the connection for Marketo connector may result in a PHP fatal error.
- [82280](#) : Delete action may cause database performance issues in certain situations.
- [82208](#) : Importing or uploading files may fail to work as expected.
- [81818](#) : If a user logs in to a Sugar instance configured with SAML via the standard login screen, an Invalid Credentials error may appear unexpectedly while utilizing Sugar.
- [81788](#) : Users may encounter unexpected behavior when uploading images in a record that contains more than one image-type field in the record view layout.
- [81733](#) : For certain report types, toggling the chart legend to remove a segment of the report chart may cause the report chart drill-through to not work as expected.
- [81648](#) : When a report is grouped by an aggregate date field (e.g. Month: Test Date), clicking the segment of the report chart where the field is empty may cause the report chart drill-through to not work as expected and display a 500 error.
- [81568](#) : Field validation is not triggered when a decimal value is improperly entered into an integer field.
- [81400](#), [79294](#) : When the "Round Numbers Over 100000" option is enabled in the report's chart options, the value that appears when hovering on a segment of the report chart may not display correctly.
- [81261](#) : Report chart drill-through may not work as expected if the report contains a date field formatted as "MM/DD/YYYY".
- [81184](#) : Attempting to view the audit log may result in a 500 error if the record was imported with the Date-type field formatted as "MM/DD/YYYY".

- [81014](#) : Attempting to drag and drop activities (e.g. calls, meetings, tasks) in the calendar may not work as expected if the calendar is set to the month view.
- [80785](#) : Global search results may not display as expected on Microsoft Edge and Internet Explorer browsers.
- [80543](#) : Calculated fields in the Quotes module containing a rollup function (e.g. rollupSum) do not get calculated until the quote record is saved.
- [80021](#) : Clicking the Cube icon to view recently viewed records may result in a 500 error for Sugar instances with a large number of custom modules.
- [79947](#) : Calculated fields may not populate when the record has multiple calculated fields using the related() function to the same module (e.g. related ($accounts, field1) and related($accounts, field2)).
- **[79861](#)**, **[70389](#)**,[65339](#) : Tabbing while inline editing the address block in the record view may not work as expected.
- [79154](#) : Logic hooks using namespaces may be improperly deleted during an upgrade.
- [78229](#) : Downloading the import file template may take longer than expected for module's containing a large number of records.
- [77280](#) : Duplicate email addresses with different capitalizations (e.g. test@test.com, Test@test.com) are improperly allowed to be added to records resulting in adverse behaviors.
- [74887](#) : When there are a large number of filters (greater than 20) created by the same user for a module (e.g. Accounts), the corresponding list view dashlet may not behave as expected.
- [69957](#) : Large number of activity stream records may cause performance issues.

Known Issues

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

- [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 fail when a custom field has conflicting field types defined.
- 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.
- 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.
- 82173 : User sessions that expire while accessing a Legacy module (e.g. studio) may cause the cross-site forgery error message to appear. As a workaround do the following: do not have multiple browser tabs open when accessing Legacy modules, raise the access_token_lifetime value to a higher value than 3600 seconds, and log out and log back in to reset the token lifetime before doing any work in Studio.
- 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.
- 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.
- 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.
- [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.
- **[80829](#)** : Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [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.
- **[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.
- [79763]() : The Account Name field does not get populated as expected for quoted line items related to a quote.
- [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.
- [79469]() : 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.

- [79173](#) : When attempting to navigate away from the module or save the record, the Unsaved changes warning message may unexpectedly appear for modules containing custom dependent fields.
- [79131](#) : When the "Listview items per page" setting in Admin > System Settings contains a large value (e.g. 50 or greater), it may cause an issue with rendering the "Download PDF" and "Email PDF" options in the record view's actions menu. Changing the "Listview items per page" setting to "20" may help resolve the issue.
- [79108](#) : When editing a record via the list view preview on the intelligence pane, the Resolve Conflict drawer may appear unexpectedly upon save.
- [78890](#) : Updating composer in instances with custom modules deployed from module builder may cause unexpected errors.
- [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.
- [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.
- [78128](#) : For dropdown list values, a value's Display Label will improperly revert to a blank value if its Item Name is 0 (zero).
- [77820](#) : The Visibility Editor window may not load as expected and display an error if there is a large number of dropdown dependencies defined in the visibility editor.
- [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).
- [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.
- [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.

Developer

The following changes in this release may affect developers:

- This release introduces a new access-control framework for Sugar that determines what features a user gets access to based on the user's license type. The files used with this framework (ex. access_control.json) comprise critical control software and should not be modified.
    - There is a new license_type field on user records that determines what product the user is using and, therefore, which features they are entitled to access.
    - Sugar users may be associated with one or more product licenses via the User Management screen or API.
- This release introduces a new VisualPipeline Sidecar module.
- Single-Spa v4.3.4 is added to Sugar Core in 9.1.0 (https://single-spa.js.org).
- Handlebars version 1.3.1-sugarcrm-temporary is updated to remedy the Prototype Pollution security vulnerability.
- HTML Purifier library is being upgraded to version 4.10
- Micro frontend view is added as a tab to the right-hand side panel.
- While back-end validation already existed for integer-type fields, there was no feedback in the user interface. Front-end validation has been added so the user will know when invalid data has been entered prior to saving the record.
- The hide_admin_backup configuration option is no longer relevant.
- Code related to out-of-date DB full-text search has been removed in this Sugar release. Sugar developers should leverage Elasticsearch-based global search APIs and functionality instead.
- SugarAutoLoader has been refactored to better integrate with Composer's autoloader. This reduces the size of the SugarAutoLoader class map. This will also allow Sugar application entry points to be bootstrapped in a more conventional way.
    - For example: require_once __DIR__ . '/../vendor/autoload.php';
- For on-site Sugar releases, the "Backups" option in the Sugar Administration panel has been removed. Please follow instructions from the [Cloning a Sugar Instance for Testing](#) article for steps to perform a full backup of Sugar filesystem and database.
- When importing audited date fields, Sugar will now store that data in a consistent format within the audit tables. Existing dates in the audit log would have used the format of the user that did the original import.
    - Existing date information when displayed in the audit log will use the format that was stored in the database and not necessarily match the current user's preferred date format.
    - Newly imported dates viewed in the audit log should display the current user's preferred date format.
- The following files have been added:

- sugarcrm/modules/Opportunities/upgrade/scripts/post/6_Opportunit yFixSalesStageFieldDefinition.php is added for upgrades to 9.1.0 to fix the sales_stage field. The upgrade script only runs for customers that are ENT flavor and use Opps + RLI. For versions prior to 9.1.0, the sales_stage field is hidden for instances that have Opps + RLI turned on. The script updates the field definition and makes the field a calculated field based on a new SugarExpression.
    - sugarcrm/modules/Opportunities/upgrade/scripts/post/7_Opportunit yUpdateSalesStageFieldData.php is an upgrade script that will update the sales_stage field based on the rules listed above. This script only runs for ENT customers that have Opps + RLI turned on
    - sugarcrm/modules/Opportunities/clients/base/api/OpportunitiesApi. php file was added along with the put endpoint. If an Opportunity has a change to sales_stage and/or date_closed on an update, then all RLIs are updated to the Opportunity's sales_stage and/or date_closed. This is only available for ENT customers that have Opps + RLI turned on.
    - sugarcrm/modules/VisualPipeline/upgrade/scripts/post/2_VisualPipe lineAddDefaultConfigs.php upgrade script adds the visual pipeline default configuration data. This script only runs for ENT customers and versions prior to 9.1.0.
    - sugarcrm/include/Expressions/Expression/String/OpportunitySalesS tageExpression.php A new sugar expression was added to calculate the rollup of RLIs for an opportunity based on the rules listed above.
- A new direction enum field has been added to the Emails module. This field is used to track the audience for the given email. For example, emails sent by your organization's employees to customers should be marked as Outbound while emails sent by customers to your organization's employees should be considered Inbound. Sugar will set this field automatically for an archived Email record depending on the related EmailParticipants.
- More robust error handling was added to the Inbound Email Scheduler so that problematic messages (e.g. long header) will not stop other processing.
- Sugar now supports the automatic purging of old Activity Stream records in the database. This is implemented via a new Sugar Activity Stream Purger job.
  Note: If you had previously installed the open-source SugarActivityStreamPurger module-loadable package, you will need to uninstall it prior to upgrading to 9.1.
- The following default SugarConfig options have been added that are used to configure the job's behavior. See the [Sugar Developer Guide](#) for more details on these settings.
    - $sugar_config['activitystreamcleaner']['keep_all_relationships_activi ties'] = false;
    - $sugar_config['activitystreamcleaner']['months_to_keep'] = 6;

- The following PHP classes have changed their inheritance hierarchy:
    - \Bug now extends \Issue instead of \SugarBean
    - \aCase now extends \Issue instead of \Basic
- It was previously Documented that all of the Activities REST APIs returned 401 Unauthorized when ActivityStreams was disabled. There has been a change such that the following three GET Requests will be returned with status: 200 OK and 0 records rather than a 401 Exception:
    - GET /<module>/Activities
    - GET /<module>/:record/link/activities
    - GET /<module>/:record/link/activities/filter
- New REST API endpoints have been added to help for REST API version 11.5 and removed from help for REST API version 11.4. These endpoints are:
    - GET /<module>/recent-product
    - GET /<module>/favorites

Supported Platforms

For information on supported platform components, see [Sugar 9.1.x Supported Platforms](#).

Upgrade Paths

Package	From Version(s)	MySQL
New Installs		☐
9.0.0-to-9.1.0	9.0.0	☐
9.0.1-to-9.1.0	9.0.1	☐

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