Sugar Enterprise 7.6.0.0 Release Notes

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Overview

This document describes the functionality available in Sugar 7.6.0.0.

Sugar 7.6.0.0 is available for both on-demand (Sugar-hosted SaaS) and on-site deployments.

Feature Enhancements

Feature enhancements in release 7.6.0.0 include the following:

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- Calls and Meetings user interface : Calls and Meetings now use the improved Sidecar framework.
- Scheduling calls with zero duration : Calls can now be scheduled in Sugar with a zero duration.
- Sugar Process Author™ : Sugar Process Author allows administrators to easily create digital forms and map out fully automated business processes using an intuitive drag-and-drop interface.
- Optional Revenue Line Items module : Administrators may now choose to enable Opportunities with Revenue Line Items or use Opportunities only via Admin > Opportunities.
- Role-based record views : Administrators now have the ability to restrict a user's Record View layout (for Sidecar modules) by role via Admin > Studio.
- Role-based dropdown options: Administrators have the ability to control the dropdown options available to users when creating or editing a record in Sidecar modules via Admin > Dropdown Editor.
- Import of role-based customizations : Role-based record view and dropdown list customizations are now included in exported Studio customizations and can be mapped to the destination instance's roles during installation.
- Column resizing: Column sizes for list views and subpanels may now be set by administrators. End users may adjust the admin-specified column sizes on list views, subpanels, etc. by expanding and collapsing the list view columns. Sugar will render the user's preferred column size across sessions until the user removes or resets the relevant browser cookies.
- Arabic language support: Users may now choose Arabic as their preferred language in Sugar. The user interface will automatically adjust to right-to-left mode.

- Chart dashlet configuration options: The chart dashlet now has various configuration options (e.g. Chart type, Value placement, etc.) available to allow users to customize their chart dashlets based on their viewing preference.
- RSS Feed dashlet: RSS Feed dashlets are now available to display external RSS feeds on dashboards and intelligence panes.
- Project Tasks dashlet : The My Project Tasks dashlet is now available to add on dashboards and intelligence panes.
- Date field filters : Date fields (e.g. Date Created) can now be filtered based on Today, Yesterday, and Tomorrow values.
- Flex Relate field filters : Flex relate fields are now available when creating search filters in Sidecar modules.
- First Day of Week setting : The first day of week setting in user preferences is now respected by calendar pickers in Sidecar modules.
- Health check : All upgrades to 7.6 will have a health check performed to ensure that the Sugar instance is suitable for upgrade.
- Manufacturers module available in reports : The Manufacturers module is now available on the Reports module.
- Opportunity and revenue line item create : Instances with Revenue Line Items enabled can now create opportunities and revenue line items simultaneously.
- Additional schedulers added : The "Remove diagnostic tool files", "Remove temporary files", and "Remove temporary PDF files" schedulers are now available via Admin > Scheduler.
- Additional error-level logging added : Additional error-level logging added to debug performance issues related to session locking.
- Rebuild Sidecar Files repair : The Rebuild Sidecar Files repair option is now available via Admin > Repair.
- D&B pagination support: The D&B "Import and Enrich" and "Contact Information" dashlets now support pagination.
- IPO Date filter criteria added to D&B Build a List : The IPO Date field is now available as a filter criteria in the D&B IPO Data panel.
- Bulk import accounts for D&B Build A List: D&B Build A List for Accounts now allows multiple companies to be imported into Sugar at once.
- Ordering of user's name in Assigned to field : The Assigned to field in advanced search for Legacy modules now lists the user's name in order for non-English languages.
- IIS and MSSQL Support : Sugar 7.6 now supports IIS and MSSQL for new installations.

Fixed Issues

The following issues have been resolved in version 7.6.0.0:

- 64675 : When a scheduler job runs, the current date parameters are improperly calculated based on the server's time zone instead of the default time zone defined in Admin > System Settings.

- 66022 : Viewing or replying to emails sent from Outlook on Windows improperly display extra lines in Sugar.
- 66436 : Negative values do not display as expected on report charts (e.g. Summation with Details-type report).
- 68913 : Setting the layout (e.g. Edit View) panel's display type to "Tab" for Calls and Meetings may cause unexpected behavior when performing a search in the Add Invitees panel.
- 69113: Non-admin users associated to multiple teams may see duplicate emails in the Emails module after archiving to Sugar.
- 69326 : Filtering on a MultiSelect field defined with more than one matching criteria for list view search may return incorrect results.
- 69726 : Custom Float field values do not display correctly if the "1000s separator" and "Decimal Symbol" preferences are changed in user preferences.
- 69956 : Creating a list of all Sugar users using the v10 REST API incorrectly returns only the last name instead of the full name for the Reports to field.
- 70163 : Cached metadata files introduce performance concerns due to large file size
- 70508: The logo uploaded via Admin > System Settings does not display properly in Sugar's footer.
- 70715 : The list view fails to render properly when the module (e.g. Calls) has a related contact with a custom name format.
- 70782 : Layout elements defined via the Extension architecture do not apply to stock layouts.
- 70842 : The PDF header image does not display as expected if the Header Title and Header Text fields are blank in the PDF template.
- 71067 : Emails with attachment fail to send and returns an error when configuring Sugar with a non-default upload directory.
- 71837 : Cached vardef files for the Tracker module are rebuilt unexpectedly.
- 71885 : Duplicating a record view containing a large number of fields may fail to save as expected.
- 72029 : The Full Text Search index does not process all records in the database leaving some records missing from the index.
- 72042 : The appropriate error message does not display when performing the health check for instances running an unsupported version (below 5.3) of PHP.
- 72080 : The calculated opportunity amounts (e.g. likely, best, etc.) incorrectly includes the related revenue line item's closed lost amounts.
- 72557 : Loading the next set of records in the module's related record subpanel (e.g. Revenue Line Items), then re-saving the record may cause duplicate records to improperly display in the subpanel.
- 72607 : Reports may return incorrect results when filtered on date fields using the "On" operator as it does not properly account for the user's timezone.

- 72613 : Selecting all records in the Revenue Line Items subpanel on the opportunity's record view improperly selects all revenue line items in the system instead of the related subpanel records.
- 72680 : When a user assigned with a large number of tasks attempts to create a call or meeting, the edit view may not load properly as the browser hangs.
- 72703: Dependent fields containing a Related () function on custom relationships may cause the record view to not load as expected.
- 72724 : Filtering the List View dashlet to return records with an empty value (e.g. Opportunity type) does not work as expected.
- 72802: Adding custom values to a dropdown list prevents its working properly in a dependent dropdown configuration.
- 72865 : The Parent Type field does not display the updated module name (e.g. Companies) in reports and continues to display the original value (e.g. Accounts) stored in the database.
- 72897 : Users assigned a role with access type set to "Admin" for a Sugar module will improperly have access to certain Process Author modules.
- 72948 : Emailing as PDF causes loss of relationship data in the record.
- 72954 : Modules with invalid vardefs causes failures when loading list views.
- 73022 : The default list view filter (My Tasks) persists in the Tasks module and is used as the default filter for subpanels in the record view.
- 73134 : When logged in with a certain language (e.g. French, Spanish, etc.), the related operator and conditions do not change as expected based on the selected field while defining the criteria for process definitions.
- 73375 : The Processes module's Select New Process User drawer displays incorrect dates and field labels.

For more information on a bug or to provide feedback, use the SugarCRM Bug Tracker located at http://www.sugarcrm.com/support/bugs.html. To view the complete list of bugs fixed in this specific release, run a search using "7.6.0.0" in the Targeted In Release field. Look for the bugs marked "Fixed" in the Resolution field.

Known Issues

The following are known issues in version 7.6.0.0:

- 53969 : The Projects module does not have the option (star icon) to designate records as favorites. As a workaround, the Favorites option can be enabled by changing 'favorites' from "false" to "true" in the ./modules/Projects/vardefs.php file.
- 65527: The SugarCRM cube icon is used as the system-wide favicon even when "Display module icon as favicon" is enabled in Admin > System Settings.
- 65647 : Users will not see updates to their avatar images without first logging

out and back in to Sugar.
- 65674 : Selecting an item from the Recently Viewed list under the module tab does not correctly update the list to include the selected record.
- 66209 : Help text is not being displayed.
- 66520 : Notes may not be edited directly from the Contracts module's Notes subpanel.
- 66521 : Likely, Best, and Worst amounts have a value of zero rather than being automatically calculated when a revenue line item is created through a workflow.
- 66573 : More than one user attempting to merge records simultaneously results in errors.
- 66580 : List view loads may experience performance issues as quantity of records loaded increases.
- 66826 : Numerical fields such as Bug Number may not be used with type-ahead functionality to generate a list of potential matches when relating records.
- 67294 : Resetting the forecast time period does not set the current time period correctly and causes various issues in the application.
- 67445 : Multiple panels cannot be added as expected to the Record View layout in Studio.
- 67886 : During lead conversion, the newly created opportunity record does not get associated to the Revenue Line Item, causing the lead conversion to not complete successfully. As a workaround, create the opportunity record during lead conversion then manually associate the opportunity to the Revenue Line Item.
- 68095 : Text provided for Campaign Tracker URLs is unexpectedly shortened after the first 30 characters.
- 68245 : Calendar dashlet may be missing from Legacy dashboard after upgrading to 7.2.0.
- 68426 : New panels added to the Record View layout in Studio do not display the panel options (Display Type, Collapse?) until the layout is saved in Studio.
- 68440 : Quick creating (e.g. Leads, Contacts, etc.) via the Emails dashlet on the Legacy dashboard opens up the legacy create view instead of the sidecar record view.
- 68461 : Searching by non-primary email addresses in the module's list view (e.g. Accounts) does not pull up results as expected.
- 68464 : Changes made to record view layouts via studio are not reflected when quick creating records until after the full creation view is used.
- 68975 : Changing the order of subpanels via Admin > Display Modules and Subpanels does not preserve the order upon save.
- 68979 : Changing the currency of a quote multiple times may introduce rounding errors to the line item price fields.
- 69391 : Changes made to module names via Admin > Rename Modules are not reflected on list view columns for modules which relate to the affected module. The column names may be corrected individually by modifying each list view's column labels via Studio.

- 69508 : Relating a new record via the Legacy module subpanel (e.g. Calls) in a module's record view (e.g. Leads) causes the Next and Previous buttons to no longer appear in the record view. Navigating back to the list view and selecting a record will correct the issue by restoring the buttons to the record view.
- 70024 : Scheduled reports may have incorrect or missing charts in the emailed PDF. Select "Print as PDF" from the report's Actions menu to see the updated chart.
- 70106 : The Skype icon does not appear next to the phone number as expected when the SkypeOut integration is enabled.
- 70124 : Studio's formula builder displays several undesired functions (getListWhere, isForecastClosed, isForecastClosedWon, and isForecastClosedLost).
- 70553 : Disabling export via Admin > Locale does not remove the Export option as expected from the list view.
- 70601 : Custom HTML files including javascript may not render correctly after upgrade to 7.5.0.0.
- 70619 : The Cases module search does not support searching for a comma-separated list of case numbers. To specify a list of cases, create a filter using the "is any of" operator.
- 70748 : The target list's Total Entries field does not display the correct count based on the number of related target list records. Reloading the web browser will resolve the issue and display the correct count.
- 70751 : Modules set as disabled in Sugar continue to improperly appear in the Sugar portal. Administrators can disable the modules via roles in Sugar portal, which should resolve the issue.
- 71446 : For opportunities and revenue line items, changes made to labels via Studio > {Module Name} > Labels do not affect list view labels. Make changes to labels via Studio > {Module Name} > Layouts > List View to modify list view layouts.
- 71807 : Studio layouts appear in reverse order when right-to-left themes are enabled.
- 71808: Merging a record that contains the Global team results in the user being unable to select or deselect the Global team.
- 71809 : Search filters do not allow the selection of blank dropdown options.
- 71810 : Portal API Users incorrectly appear in active users lists for filters.
- 72098 : Clicking the "Restore Default" button in Admin > Studio automatically saves and displays the out-of-the-box default layout despite not saving the change in Studio.
- 72290 : Performing multiple edit and save actions on the Revenue Line Items subpanel for fields using Sugar Logic, may cause the Resolve Conflict drawer to open unexpectedly.
- 72326 : Restricting dropdown options (e.g. moduleListSingular) via Admin > Dropdown Editor applies to Process Author modules which may result in unexpected behavior.
- 72357 : Alert message displays when completing the installation of Sugar

using IE browser (9, 11). Clicking the Retry button in the dialog box will open Sugar accordingly.

- 72767 : Parentheses are not available as mathematical operators for formulas when building process definitions.
- 72881 : Entering "0" in the Best and Worst fields for the revenue line item do not save the value as expected. As a workaround, enter "0.00" into these currency fields and the value will save properly.
- 72882 : When accessing Sugar using Internet Explorer, the date picker does not display properly and disappears when using the scroll bar on the page. As a workaround, scrolling with your mouse or trackpad will display the calendar picker properly.
- 72884 : When filtering on currency fields (e.g. Likely) for revenue line items and opportunities, performing a search does not return results as expected when based on the user's preferred currency.
- 72887 : Customizing a role-list while creating a custom DropDown field in Studio causes the new field to not be saved. As a workaround, create and save the new field before making changes to any role-lists.
- 72898 : Parent Type and Parent Name fields are displayed as available fields for process definition conditions even though conditions do not support relate fields. The inclusion of either of these fields in an evaluation will return zero results.
- 72900, 72901,72905 : Fields configured as read-only or required within a process definition may not be respected as such during process execution.
- 72903 : The Save button on the Visual Design toolbar of a process definition does not consistently assume an inactive state to indicate that recent changes have been saved.
- 72906 : Non-admin users who have developer-level role access to Sugar modules do not have access to the Process Author panel on the Administration screen. These users may navigate to Process Management via the Processes module tab menu.
- 73201 : For instances deployed on Oracle, creating a search filter for the Description field with condition set to "exactly matches", does not return results as expected for Sidecar modules.
- 73259 : Accepting or rejecting a recurring call or meeting accepts the first meeting or call in the series instead of the full recurring series.
- 73270 : Renamed modules retain their old labels within the Process Author suite of modules.
- 73372 : During process execution, the process user can edit the Assigned To field but it will not be saved. The process user should instead use the "Change Assigned To User" option in the target record's actions menu. This option must have been enabled by the administrator in the process definition's design.
- 73373 : "Copy", "Find Duplicates", and "Merge Duplicates" do not function properly for Process Definitions and Process Business Rules.
- 73374 : Process notes created during "Select New Process User" are not saved.

- 73376 : Process business rule conclusions are not processed successfully when return value type is a field value.
- 73378 : "[Object Object]" is displayed as an available field in the Process Business Rules Builder for the Accounts, Contacts, and Targets modules.
- 73379 : Process Author dashlets do not automatically refresh when toggling between tabs within the dashlet.
- 73380 : The Processes module tab incorrectly allows access to completed activity forms via the Recently Viewed and Favorites menus. The ability to re-execute these forms is restricted.
- 73381 : The check mark is not retained in the user interface when the Change Record Owner or Reassign Activity checkboxes are enabled on a process definition's form activity. Despite this, the functions will continue to work as expected.
- 73382 : The Processes list view does not display multiple activities with the same Process ID when parallel activities exist.
- 73383 : Approve/Reject form activities cannot be used in process definitions when the target module is set to "Knowledge Base".
- 73384 : Add Related Record actions cannot be used in process definitions when the target module is set to "Revenue Line Items".
- 73385 : If an active process definition's Name field is edited, the Process Management list view will not reflect this change for existing line items. Processes or process activities that are triggered after the edit occurs will reflect the new name.
- 73386 : Users with an inactive user status incorrectly appear in Assigned User dropdowns for Process Author modules.
- 73387 : The Accounts module's Employees field displays as "[object Object]" in the Process Business Rules available fields list. To use the Employees field in an Accounts-based business rule, select "[object Object]" from the dropdown list.
- 73388 : Filters are not respected in the My Processes list view, however the Process Management list view can be successfully filtered.
- 73390 : Legacy modules may exhibit behavioral limitations when targeted for a process form activity.
- 73391 : Process activities related to a lead or contact record cause the Suffix, First Name, and Last Name fields to display on separate rows on the form execution screen.
- 73394 : Using multiple Start Events in a process definition may not always behave as expected.
- 73395 : Calculated fields are unexpectedly displayed in field-selector dropdowns for Process Author modules. Process Author restricts the use of calculated fields for security purposes.
- 73410 : Exported process definitions will re-import in an "Enabled" or "Disabled" state instead of always defaulting to "Disabled".
- 73426 : Users with no access to the Opportunities and/or Revenue Line Items modules can improperly access the Forecasts module. As a workaround, administrators should disable the Forecasts module for roles where the

Opportunities or Revenue Line Items module is disabled.

- 73466 : Clicking the Test Connector button to validate the connector settings (e.g. Twitter, D&B) may improperly confirm a successful connection.
- 73485 : Parent modules incorrectly appear in Process Author related-module dropdown lists.
- 73486 : Unclaimed quote records queued for self-service process activities do not display Quoted Line Items as expected. Clicking the Claim button will resolve the issue and display the Quoted Line Items.
- 73487 : Attempting to connect to the Google application via user preferences fails to connect successfully and results in an error.
- 73488 : Re-ordering list view columns does not work as expected for iPad and mobile devices.
- 73489 : The Email field does not display as expected in the pop-up search window for Legacy modules and may prevent filtering by this field.
- 73490 : When a user's access to the Forecasts module is disabled, it improperly disables the Forecast Pipeline Chart dashlet for users who have access to the Opportunities and/or Revenue Line Items modules.
- 73491 : Deleting a project via detail view after exporting to MS Project results in an error. As a workaround, delete the project from the list view.
- 73492 : Sorting the Forecasts module by Likely, Best, or Worst fields may not sort by the base currency amount as expected.
- 73499 : The End Date fields for calls and meetings are not available to select when defining elements (e.g. Action, Activity) in the process definition.
- 73500 : The Email Reminder Time fields for calls and meetings do not display a field value dropdown when configured within process definitions. To specify an Email Reminder Time value, enter the time interval in seconds (e.g. 5 minutes should be entered as 300).
- 73503 : The dropdown list of available fields may disappear while defining action elements in a process definition if a required field is clicked into but not completed. To resolve this issue, exit the configuration screen and define the action elements again.
- 73513 : Selecting a new, one-way process user for Approve/Reject forms improperly cause the form to change to a Route form for Legacy modules.
- 73514 : Editing an existing process definition via Visual Designer will not update the record's Date Modified field as expected.
- 73578 : Certain schedulers (e.g. Process Author Scheduled Job, etc.) may be missing in Admin > Scheduler after upgrading to 7.6.0.0. As a workaround, manually create the missing schedulers via Admin > Scheduler. Customers who have never customized or added new schedulers in their instance can navigate to Admin > Repair and perform "Rebuild Schedulers", which will restore the default out-of-the-box schedulers. Please note that this will remove any custom schedulers as well as changes to default schedulers.
- 73681 : Inbound emails may not render as expected and display HTML syntax in the view pane when viewing via the Emails module. As a workaround, enable "Import Emails Automatically" for the inbox account and then right-click on the email and select "View Relationships" to display the

properly formatted message.
- 73697 : Studio does not override custom dropdowns defined via Extension architecture as expected.
- 73785 : Workflows with an Active status are improperly set to "Inactive" after upgrading to 7.6.0.0.

Additional Product Information

Sugar 7.6.0.0 does not include support for the following pieces of functionality:

- Offline Client is not supported in Sugar 7.
- Use of fieldset-with-labels fields is deprecated in 7.5 and will be removed in 7.6.
- Sugar Mobile Plus is not supported in Sugar 7.

Supported Platforms

For information on supported platform components, see Sugar 7.6.x Supported Platforms.

Last Modified: 12/02/2016 07:19pm