Sugar Enterprise 7.6.2.1 Release Notes

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Overview

This document describes the functionality available in Sugar Enterprise 7.6.2.1.

Sugar 7.6.2.1 is available for both On-Demand (Sugar-hosted SaaS) and On-Site deployments.

Administrator and End User

Fixed Issues

The following issues have been resolved in version 7.6.2.1:

- 75591 : Certain dropdown options may not appear as expected for modified dropdown fields after upgrading to 7.6.2.0.

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 "7.6.2.1" 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 7.6.2.1:

- 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.
- 66022 : Viewing or replying to emails sent from Outlook on Windows

improperly display extra lines in Sugar.

- 66209 : Help text is not being displayed.
- 66520 : Notes may not be edited directly from the Contracts module's Notes subpanel.
- 66573 : More than one user attempting to merge records simultaneously results in errors.
- 66580,68435 : List view loads may experience performance issues as quantity of records loaded increases. Reducing the Listview items per page setting in Admin > System Settings may help resolve the issue.
- 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.
- 66842 : Relate fields cannot be sorted as expected in the list view.
- 66900, 67294 : Resetting the forecast time period does not set the current time period correctly and causes various issues in the application.
- 66910 : The notification for Cases module does not include the case number as expected when triggered via the workflow.
- 66995 : The Display server response times option is improperly available to select via Admin > System Settings.
- 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.
- 68112 : Matrix-type reports display incorrectly when exported to PDF.
- 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.
- 68737 : Custom relationship field labels that were modified, improperly revert to the original label after upgrading the instance.
- 68843 : The Product Catalog module cannot be filtered by the Type field in Sugar 7 as it is not available to add via Admin > Studio.
- 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.
- 69382 : Campaign tracker URLs may log campaign status entries with no recipient information when clicked from outside the campaign email.
- 69391 : Changes made to module names via Admin > Rename Modules are not reflected on list views columns for modules which relate to the affected module. The column names may be corrected individually by modifying each listview'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 again in the record view.
- 69801, 69918 : Changing the style attributes for table tags, image tags, etc. on email templates via HTML may result in parts of the code getting removed upon save.
- 69985: If a custom module has a relationship with an individual Activity-type module (e.g. Tasks), this related module may not be available to select when creating a workflow action to create a record in a module (Tasks) associated with the target module (e.g. custom module). As a workaround, create a one-to-many relationship between the custom module and the Activities module, and the appropriate Activity-type module (e.g. Tasks) will be available to select when creating the workflow action.
- 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).
- 70389 : Tabbing while inline editing the address block in the record view does not work as expected as it does not tab through all the fields (e.g. state, postal code, etc.) within the address block.
- 70542 : The "Show Completed Meetings, Calls, and Tasks" option is not available in Calendar > Settings, which can cause performance issues in the Calendar module for users who have a large number of activity records. Setting Admin > System Settings > vCal Updates Time Period to "-1" will relieve the performance delay, however this will prevent user availability information from appearing when scheduling a call or meeting.
- 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.
- 72000 : Changing the Admin user with user ID = 1 to a regular user may cause the system index to not index records properly in Sugar. To resolve the issue, change the Admin user (user ID = 1) back to a System Administrator User.
- 72022 : The Projects module is incorrectly available to select via Admin > Mobile.
- 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.
- 72264 : Clicking on the opportunity's name in the Quotes detail view after downloading the quote to PDF improperly redirects to the home page instead of the opportunity's record view. As a workaround, right-click on the opportunity name after downloading the quote to PDF and the opportunity's record view will open accordingly.
- 72286 : The Opportunity module's amount fields cannot accept negative values.
- 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.
- 72409 : When generating a report, labels may improperly overlap in the chart (e.g. Vertical Bar chart) causing the labels to be unreadable.
- 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, 74267 : 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.
- 72956,73729 : Populating a target list by selecting a report for a module (e.g. Accounts) may not add all records as expected if the report contains a large amount of data.
- 73025 : Changes made to audited custom relate fields do not display in the View Change Log as expected.
- 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 and does not display the updated name.
- 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.
- 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.
- 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 related module dropdown lists.
- 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 despite the user having 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.

- 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.
- 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.
- 73787 : The Revenue Line Items module may not immediately appear in the navigation bar after enabling opportunities with revenue line items. Logging out and back into Sugar or reloading the page will resolve the issue and display the Revenue Line Items module.
- 73929 : Cases created from inbound emails may improperly display the case's description as HTML.
- 74007 : Disabling the Show Full Names option in user preferences is not respected and continues to display the user's full name instead of their username in Sugar.
- 74086 : Grouping a report (e.g. Summation-type report) by the "Month: Date Created" or "Month: Date Modified" field may display the months incorrectly in alphabetical order on the X-axis of a line chart.
- 74101 : When a new dashlet is added to the Opportunities module after removing an existing dashlet (e.g. Pipeline dashlet), the dashlet does not appear in the dashboard as expected after reloading the page.
- 74118 : The My Items filter is incorrectly available for use in the Processes list view and dashlet.
- 74163 : The process definition's designer canvas and Settings window improperly overlap after upgrade. Clearing the browser cache will help resolve the issue.
- 74205 : Having a leading or trailing space in an item name in the dropdown list may cause unexpected behavior when filtering the module search using the specific dropdown value.
- 74272 : The Email Address field does not appear in the list view of custom modules (e.g. Company-type) after upgrading from 6.x to 7.6.1.0. To resolve the issue, navigate to Admin > Studio and move the Any Email field from the Hidden column to the Default column in the custom module's List View layout.
- 74279 : Clicking "Cancel" while inline editing the Quantity field in the Revenue Line Items list view, incorrectly updates the values in the Likely, Best, and Worst fields. Reloading the page will restore the original values for the Likely, Best, and Worst fields on the list view.
- 74431 : Downloading a quote to PDF may result in a TCPDF error if the PDF file includes a header image and spans multiple pages.
- 74520, 74534, 74625, 75078 : When a process definition's Action or Activity references a datetime field, the related processes may cause unexpected errors.
- 74564 : Changing the Business Card panel's display type to "Tab" for the Knowledge Base module in the Sugar Portal may result in errors when trying to access the module in the portal.

- 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".
- 74674 : The layout for the Revenue Line Items create subpanel in the Opportunities module cannot be modified via Admin > Studio.
- 74871 : Active workflows involving the Opportunities module may be set to "Inactive" after upgrading to 7.6.1.0. As a workaround, manually reactivate the workflows in the database that were active prior to the upgrade.
- 74942 : Instances may experience intermittent errors involving the relationships cache file. As a workaround, remove /cache/Relationships/relationships.cache.php and run a relationship repair via Admin > Repair > Rebuild Relationships.
- 75557 : Attempting to create a new record (e.g. opportunities) via the Quick Create menu while in the create view of a Sidecar module (e.g. Leads), may cause the Create button in the current module (Leads) to not work as expected if you cancel out of the quick create view.
- 75559 : Attempting to reply to or forward a sent email via the Emails module may result in internal server error.
- 75561 : The Process business rule may not display in the designer as expected after the upgrade and improperly display a warning message if the condition includes any fields that are considered invalid for process business rule conclusions even though it is valid for conditions.
- 75562 : When a process creates a related contract record, Sugar also generates a document record that incorrectly contains no values.
- 75572 : Configuring the Quick Create menu via Admin > Configure Navigation Bar Quick Create may not work as expected. To resolve the issue, navigate to Admin > Repair and perform a Quick Repair and Rebuild then reload the page to view the changes made in the Quick Create menu.
- 75722 : Manually updating the public metadata javascript without clearing the entire metadata_cache table may cause the browser to reload indefinitely when accessing Sugar.
- 75580,75587 : Creating and running Matrix-type reports may not display the results correctly as expected.
- 75588 : Email addresses imported to Sugar are not marked as "Primary" by default on the record.
- 75866 : Instances used in multiple languages may experience corrupted language files after upgrade to 7.6.2.1. As a workaround, perform a "Quick Repair and Rebuild" from Admin > Repair then log into the instance using the language selected in Admin > Locale > Language immediately prior to upgrading the instance.
- 76231 : The Revenue Line Items module disabled via Admin > Configure Navigation Bar Quick Create may improperly display in the Quick Create menu after upgrading to 7.6.2.0. As a workaround, navigate to Admin > Configure Navigation Bar Quick Create to disable the Revenue Line Items

module again for the Quick Create menu.

Developer

Development Changes

Developer-level feature enhancements in release 7.6.2.1 include the following:

- Language file hierarchy : The order that language strings are loaded from the file system has changed. See the Sugar Developer Guide for more details on the updates language file hierarchy.

Additional Product Information

Sugar 7.6.2.1 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.

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