Sugar Sell 12.3 (Q1 2023) Release Notes

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Overview

This document describes the changes and functionality available in Sugar® Sell 12.3.0 (Q1 2023). Sugar Sell is available in three Editions: Sugar Sell Premier, Sugar Sell Advanced, and Sugar Sell Essentials and is only available for SugarCloud (Sugar-hosted SaaS) deployments.

For information about any changes to existing functionality in this release, you can also refer to the [What to Expect When Upgrading to 12.3](#) article.

Feature Enhancements

Features Common to All Sell Editions

The following features and enhancements are included in all editions of Sugar Sell 12.3.0 (Q1 2023):

User Interface

- **[User interface redesign](#)**: Easily navigate your way through Sugar with the thoughtfully redesigned navigation bar and header.
    - **Modern sidebar navigation**: The navigation bar, including the quick create menu and home button, has moved to the left side of the screen.
    - **Global Search more readily available**: Sugar's new header features the search bar front and center.
    - **Additional vertical screen space**: The options in Sugar's footer (e.g., Doc Merge) have been moved into the user menu and the bottom of the navigation bar to allow for more vertical screen space.
    - **Compact but flexible design**: The navigation bar is compact, displaying your top 4 modules, to enhance focus, reduce visual noise, and lighten your mental load. It can be expanded to locate additional modules and see more details when needed.
    - **Refreshed icon library**: Sugar's icon library is updated, and modules can now be represented by icons displayed in the navigation bar and throughout Sugar.
- [Tabbed browsing within focus drawers](#): All record links in focus drawers are opened in focus tabs within the drawer, allowing users to work seamlessly in one place.
    - **Record view added to focus drawers**: Record links in focus drawers now open a tab displaying the newly added focus record view, which provides full record navigation, including subpanels,

within your focus drawer.

- ○ **Record View dashlet titles can be clicked:** Record View dashlet titles have been made clickable links in focus drawers so more information is available to be viewed directly in focus tabs.
- [Consistent browser and user profile time zones](#): The user's time zone in Sugar will now be automatically updated to match the browser's time zone.
- **Clickable case number field**: The case number field can now be clicked from the Cases list view, List View dashlet, and subpanel to access the case record.
- **SugarOutfitters link added to Sugar**: A link to [SugarOutfitters](#), the SugarCRM marketplace with a vast selection of third-party solution add-ons, has been added to the [Help](#) pane and the [Administration](#) page.
- [Improved messaging for modified report](#): If a report that you have previously viewed is edited by another user, you will see a pop-up message indicating that the report has been edited the next time you open the report.

Sales-Focused Enhancements

- **More clickable links to open focus tabs in the** [Renewals Console](#): There are now many ways to view information within the console without navigating away or manually searching.
  - ○ **Column fields now clickable**: More fields in the console list view (e.g., Parent Opportunity) are clickable links that open a [focus tab](#).
  - ○ **Open all record links within the console**: Record links anywhere in the [Renewals Console](#) now open [focus tabs](#), allowing sales representatives to view a variety of information in one place without leaving the console.
- **Resizable columns for Renewals Console**: Users can now resize the column widths in the Renewals Console's list views per their viewing preference.
- **Lost field added to Opportunities layouts**: The Lost field, which represents the sum of Likely values of all related revenue line items in a sales stage of "Closed Lost", has been added to the Opportunities layouts by default.

Guided Selling Enhancements

- [**Sugar Automate built into Sugar**](#): Customers who use Sugar Automate will no longer need to maintain a module loadable package because the functionality has been built into Sugar's code base and can be enabled via license key in either SugarCloud Settings or User Management.
- **Refreshed colors and icons**: Colors and icons in Sugar Automate are updated, bringing a modern and consistent look and feel throughout Sugar.

Integration Enhancements

- [Open Dropbox files from Cloud Drive dashlet](): When the Cloud Drive dashlet is connected to Dropbox, you can now click a file name to open the document in Dropbox.

Administration Enhancements

- [**Customize module names and icons**](): Administrators can choose whether modules are represented by icons or abbreviations and can edit module colors, icons, or abbreviations to suit their business.
- **Allow multiple domains to be excluded from auto-reply emails**: Administrators can now enter multiple domains separated by commas in the "No Auto-Reply to this Domain" field of the Inbound Email module to exclude from receiving auto-reply emails.
- [Additional field columns added to the scheduler's job log](): The "Result" and "Messages" field columns have been added to the scheduler's Job Log subpanel to provide additional information related to the outcome (e.g., success) of the job and any informative messages.
- [Calculated dropdown fields](): Dropdown fields can now be designated as calculated fields in Admin > Studio.

Additional Capabilities in Sugar Sell Premier

In addition to the [shared Sell features]() listed above, customers upgrading to 12.3 Sell Premier will have this additional feature:

- [Forecast Tracker visualization](): You can now visually track how your forecasts, commitments, and sales won evolve over time in relation to your quota so that you can stay on track throughout the quarter. Note that this capability requires [implementation]() by a SugarCRM representative or partner.

Fixed Issues

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

- [91071](): The Export PDF option for reports is available to select for users who do not have permission to access the report.
- [91060](): Attempting to import contacts from Google may not work as expected due to field mapping issues.
- [91052](): When using Sugar version 12.0 and higher with PHP 8.0, a PHP fatal error may occur when a SugarBPM process is triggered.
- [90912](): In certain circumstances, the resolve conflict error may improperly

appear when editing account, contact, or lead records.

- [90869](#): In certain circumstances, reports with more than one filter group may fail to run and display a permission error.
- [90853](#): For Sugar instances using Sugar Maps, enabling the Distance field for search in Admin > Studio does not work as expected.
- [90851](#): Certain dashboards may break after upgrading to 12.2 depending on how they are stored in the database.
- [90816](#): After upgrade, attempting to access the Admin > System Settings page fails to load with an error when logged into Sugar with the English US or English UK language.
- [90727](#): Generating a summation-type report for a module with a large number of records may fail to render any data and result in an error.
- [90710](#): Legacy modules (e.g., Users, Campaigns, Schedulers) fail to load with an error when running Sugar using MySQL 8.0.31.
- [90697](#): The axis label on bar charts may be incorrect for Summation With Details reports containing more than one display summaries (e.g., AVG: likely, MIN: likely).
- [90657](#): Invalid MIME Type errors may get logged in Sugar when creating Summation-type reports.
- [90640](#): If an instance has a large number of purchases or purchased line items, deleting an account with relationships to one or both of those modules can have performance issues.
- [90602](#): When a report has multiple run-time filters for the same field (e.g., Accounts name), changing the filter value (e.g., ABC Company) in the report's Filters panel may not return the correct results.
- [90595](#): Changing the filter value for a run-time filter using the "Is Between" operator may not return the correct set of data in the results.
- [90572](#): Reports containing a "Is Between" run-time filter for a DateTime field may not properly respect the system date format setting and result in an error when running the filter.
- [90555](#), [90554](#): For instances using Cloud Drive, the Cloud Drive dashlet may not display folders in Microsoft OneDrive as expected.
- [90547](#): In certain circumstances, changing the list view filters may result in unexpected performance issues.
- [90538](#): When a field column is sorted on a generated report, it does not preserve the change as expected and the data is no longer sorted when acessing the report later.
- [90474](#): After upgrade, certain modules may be missing in Sugar due to some unexpected issues in the database.
- [90437](#): Chart sorting on the Report Dashlet does not work as expected for charts in reports with multiple group-by fields (e.g., matrix-type reports) or for charts sorted on a function value (e.g., SUM: Likely).
- [90433](#): When a user is assigned a role restricting their ability to edit a report, any layout changes they make to the report's results view does not get preserved and reverts back to the previous layout when they leave the report or refresh the browser.

- [90414](): The bar graph in reports incorrectly display a total percentage value of 100% instead of the actual total percentage.
- [90407](): The Accessed On field for reports does not update as expected to reflect the date that the report record was last accessed.
- [90366](): Long field values in reports do not wrap around or truncate in the field column, but instead overlaps to the next field on the right.
- [90360](): The link to the Sugar record (e.g., opportunity name) does not display as a hyperlink in reports if there is a custom date field preceding the record name field in the display columns.
- [90351](): Line charts in reports incorrectly display the date values (e.g., start date in months) in alphabetical order instead of in chronological order.
- [90349](): Funnel charts may appear very large in reports and dashlets and require scrolling to view the full chart.
- [90348](), **90345**: When using Sugar version 12.0 and higher with PHP 8.0, unexpected errors may occur when referencing specific records in the activity stream or opening a custom dropdown field in a module's record view.
- [90337](): When the display label (e.g., Test) on a dropdown list matches the name of a dropdown field (e.g., Test) added to the report filter, the corresponding dropdown option displays "Array" instead of the correct display label (e.g., Test).
- [90325](): Reports containing multiple run-time filters for the same field (e.g., Date Created) may not preserve the run-time filter value as expected when the browser is refreshed or the user navigates away from the page.
- [90257](): The Filters panel in reports does not properly respect the user's preferred date format and shows the date using the YYYY-MM-DD format.
- [90192](): The report's Advanced Filters drawer does not correctly display all the filters applied to the report.
- [89915](): Clicking the Dropbox file name in the Cloud Drive dashlet does not display the preview of the file and opens a blank page instead.
- [89660](): Using the Action Button to automatically create a call related to the current record may fail with an error when the calculated Start Date uses the now() function.
- [89483](): When a report is grouped by a multi-select field, drilling through the report chart results in a 500 error.
- **89457**: The search bar in SugarLive does not work in instances that include Hint (e.g., Sugar Premier instances).
- [88989](): Using a calculated field in a related or rollup function causes the calculation to be performed, and thus the record to be saved, even if no changes were made to the relevant field during the record save.
- [88706](): Archiving emails via the Sugar Email Archiving service improperly creates a new blank case for emails that include the case macro (e.g., [CASE:1234]) in the subject line.
- [88641](): Attempting to filter reports using the Service End Date field for the Revenue Line Items or Purchase Line Items modules does not work due to missing filter options.

- [88500](): Attempting to copy a customized role-based record view layout in Admin > Studio may not work as expected and result in an error.
- [88450](): Calculated date fields containing a maxRelatedDate() function may incorrectly show the current date even though the field should be blank.
- [88241](): When logged into Sugar using a non-English language, the meeting invitations sent to guests do not contain the meeting details and appear blank.
- [88188](): Drilling through report charts may not work as expected for Summation-type reports filtered or grouped a certain way.
- [88031](): When importing leads to Sugar, the View Import Results step of the import wizard does not display the list of lead records that were created even though the import is complete.
- [87854](): When performing an import using a CSV file with duplicate "sync_key" entries, the import result provides misleading information.
- [87018](): Hard deleting note records via the Data Archiver module does not delete the record's file attachments in the upload directory as expected.
- [86663](): Adding more than one Product Catalog dashlet on the dashboard may cause one of the dashlets to break and not work as expected.
- [79930](): The Forecast view breaks and does not load as expected when there are any users that have an @ symbol in their username.
- [78302](), [77738](): Merging records (e.g., Accounts) containing a large number of related records (e.g., Cases) may result in unexpected behaviors/errors.

Known Issues

The following known issues are present in version 12.3.0 (Q1 2023). [Case Portal users]() can use the following links for more details about each issue:

- **[91182]()**: In certain circumstances, email alerts for legacy workflows may have formatting issues and render the email content incorrectly.
- [90847](), [88858](): Unexpected email issues may occur in Sugar when using the Microsoft Exchange mail account as the authorized system email account.
- [90109](): Data tables in the reports viewer may take a long time to load or potentially fail to load for reports with large data sets.
- [90000](): Attempting to reduce the height of a resized dashlet may not work as expected and break the dashlet. As workaround, remove the affected dashlet and add it again to resize accordingly.
- [89878](): The Forecast Bar Chart dashlet in the Forecasts module does not display any data for individual sellers.
- [89873](): In certain circumstances, when defining the report filter and clicking the Select button to choose a particular record, the Search and Select pop-up window is blank and generates an error in Sugar.
- [89831](): Exported reports do not respect the locale settings in Sugar and incorrectly displays the date using the YYYY-MM-DD format.
- [89728](): In certain circumstances, opening the list view Mass Actions menu

does not display properly on the screen.

- [89564](): In certain circumstances, the time stamp in reports may be incorrect even though the user profile time zone matches the computer's time zone.
- [89542](): For instances wth a very large number of SugarBPM processes, trying to view the list of processes in the Process Management's list view may result in performance issues and fail to load.
- [89535](): In certain circumstances, the datetime values (e.g., Date Created, Date Modified) in reports may not match the actual datetime values in the Sugar record.
- [89525](): Selecting "All" from a record's related subpanel filter does not get preserved and reverts back to the last option chosen when logging out of Sugar.
- [89227](): When an instance is configured to use Opportunities with Revenue Line Items and a user is assigned a role restricting access to the Forecasts module, the user will be prevented from creating opportunities or converting leads in Sugar.
- [89084](): In certain circumstances, scheduled reports may unexpectedly become deactivated.
- [89078](): In certain circumstances, the navigation bar may not display correctly after upgrade. For information on the workaround, refer to the issue's description in the case portal.
- [88957](): In certain circumstances, performing a global search in Sugar may result in a 500 error.
- [88587](): The titles used for left-hand Calendar panels may not properly set users' expectations for the calendars that are available.
- [88436](): When a user does not have access to the calendar due to teams permissions, the calendar still appears as an option in the Calendar UI under "My Calendars".
- [88374](): Attempting to reorder the columns in the Worksheet Columns Preview list view in Admin > Quotes Configuration does not work as expected. As a workaround, remove all the fields from the Worksheet Columns section then add the fields again to the section.
- [88366](): When performing an advanced search in legacy modules (e.g., Users), the Status field may default to "NULL" causing search to not work as expected.
- [88261](): Attempting to download a PDF file may fail if the PDF template contains an image that is hosted on a site using "HTTPS" in the URL. As a workaround, use an image that does not contain "HTTPS" in the URL.
- [88230](): When a datetime field is near the bottom of the Show More tab in the module's record view, the datetime picker does not render properly on the screen.
- [88206](): In certain circumstances, installing packages in Module Loader may not work as expected and the package may get uninstalled with errors.
- [88098](): Sorting certain module list views (e.g., Contacts) by the Account Name column may not display the records in the correct alphabetical order

as expected.

- 88055: Users may experience unexpected behaviors when using Sugar via the Firefox browser. As a workaround, access Sugar using Chrome or Microsoft Edge browsers.
- 87908: For instances that use SugarIdentity, the Reset Multi-Factor Auth option improperly appears during a user impersonation session.
- 87880: The default system currency incorrectly displays "US Dollars" as the currency name even though the system currency is changed to a non-USD currency (e.g., AU Dollars) in Admin > Locale.
- 87701: Naming a custom field "processed" causes web logic hooks to fail to fire because it conflicts with Sugar's internal logic hook handling. As a workaround, use a different, un-reserved string as the field name.
- 87602: In Sugar Enterprise, portal customization settings for the following features in Admin > Sugar Portal > Theme Portal are available but not applicable to the portal: the search bar, the banner, and the dashboard.
- **87601**: In Sugar Sell, portal customization settings for the following features in Admin > Sugar Portal > Theme Portal are available but not applicable to the portal: the search bar, the banner, the New Case button, and the dashboard.
- 86836: When making changes in the Configure Summary Panel drawer of the SugarLive configuration view, opening a module in the navigation bar does not warn you before discarding your changes.
- 86493: Modifying the Preview layout for the Notes module prior to upgrading may cause the Attachments field in the layout to not display multiple note attachments as expected. For information on the workaround, refer to the issue's description in the case portal.
- 86335: SugarLive does not become available when you populate the Contact Control Panel URL field unless a value is also entered in the Instance Name field. As a workaround, enter a dummy value in the Instance Name field.
- 86285: In certain circumstances, users may experience unexpected behaviors when attempting to expland a subpanel or edit an empty Subpanel layout in Admin > Studio. For information on the workaround, refer to the issue's description in the case portal.
- 86256: Portal users may be unable to drag and drop files as attachments for Notes in the Sugar Portal.
- 86255: When SugarLive is open, navigating to the Admin page in Sugar may not work as expected. As a workaround, navigate to a modules list view while SugarLive is open then open SugarLive again and navigate to the Admin page.
- 86010: Auditing relate fields connected to 1:1 relationships only audits changes on one side.
- 85962: Dashlets with filters on a shared dashboard may not be accessible to members of the associated team(s) as expected.
- 85589: Saving the SAML settings may fail with an error "Maximum Length should be positive value" when the maximum length is not set for Sugar

password requirements.

- [85533](#): If you have multiple tabs open when a call or chat ends in SugarLive, the Create drawer for the call or message record opens in every tab, resulting in duplicate records being created.
- [85435](#): The subpanel column widths may not behave as expected in certain circumstances to display all the columns without having to use the scrollbar.
- [85409](#): After refreshing the browser, the SugarLive icon in the footer indicates that the user is logged out of SugarLive when they are not.
- [85246](#): Errors may get logged in the system after upgrading or installing Sugar when certain license data is missing.
- [84987](#): User assigned to the Service Console and/or Renewals Console cannot configure the module tab drawer as expected to add or remove dashlets.
- [84909](#): Hyperlinks are not clickable in text area fields for Legacy modules (e.g., Documents). As a workaround, add"https://" in the URL (e.g., https://www.example.com) for Legacy modules and the hyperlink will then be clickable.
- [84884](#): For SugarIdentity-enabled instances, employee records that are tied to a user record in the Cloud Settings console cannot be duplicated in Sugar.
- [84684](#): In certain circumstances, saving the Preview View layout for modules (e.g., Accounts) via Admin > Studio may not work as expected and result in an error.
- [84426](#): The Meeting Type field in the Meetings module does not reflect new values added to the Meeting Type dropdown list in Admin > Dropdown Editor.
- [83997](#): Adding additional panels/tabs or removing the Show More panel in the Record View Layout in Studio may cause the record view layout to display incorrectly. As a workaround, restore the default layout in Admin > Studio.
- [83985](#): When the "Field Name Placement" user preference is set to "Beside Field Value", some labels will remain above the field value for the Calls and Meetings modules.
- [83880](#): Changes made to role-based view layouts are not applied to users assigned to the role. As a workaround, perform a Quick Repair and Rebuild for the change to take effect.
- [83796](#): SugarBPM processes always run after module-level logic hooks and it is not possible to configure them to run before logic hooks.
- [83715](#): User assigned to the Service Console and/or Renewals Console does not have access to configure the console settings.
- [83574](#): Editing contact records containing a duplicate portal name may result in a number of unexpected errors when saving the record.
- [83461](#): Sugar licenses that are not revalidated after purchasing additional seats or a renewal may result in unexpected behavior with list view filters. As a workaround, re-validate the license via Admin > License

Management.

- [83425](): Custom Date fields in the PDF template may not respect the user's preferred date format.
- [83335](): Performance issues may occur for instances that have a number of related calculated fields, legacy workflows, and SugarBPM processes that trigger at the same time.
- [83328](): Generating reports may result in a database error for Sugar instances using MySQL 5.7 if the ONLY_FULL_GROUP_BY setting is enabled. As a workaround, disable sql_mode=only_full_group_by in the MySQL server configuration.
- [82840](): Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [82810](): Fields based on non-existent or improperly defined custom field types may cause upgrades to fail.
- [82756](): Upgrades fail when a filter exists for a module that has been removed.
- [82742](): The Forecast Bar Chart Dashlet may not load as expected in shared dashboards.
- [82486](): Upgrades may fail when a custom field has conflicting field types defined.
- [82468](): Custom decimal fields may prevent upgrades from completing and result in invalid alter queries being generated. As a workaround, use the queries described in the issue's description in the case portal to convert the decimal fields.
- [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.
- [82050](): Web logic hooks may not trigger as expected after save when new records are created.
- [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.
- [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.
- [80968](): Attempting to disable SAML authentication via Admin > Password Management may not work as expected in certain circumstances.
- [80865](): It is not possible to search by the Record Name column in Process Management.
- [80759](): In PDF templates that contain more than one href link, only the first link works.

- [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.
- [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.
- [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.
- [78709](): Users assigned a role with Delete, Edit, or Export permission set to "Owner" may improperly be restricted from downloading and emailing PDFs.
- [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.
- [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.
- [78315](): The same Process ID may be used for multiple processes if a process definition's Start condition is triggered by simultaneous events.
- [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.
- [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.
- [74628](): Certain workflows using a Relate-type field in the condition may fail to load as expected and result in errors after upgrade. As a workaround, run the following query in the instance's expressions table:

```
UPDATE expressions
SET    exp_type = "id"
WHERE  exp_type = "relate"
       AND lhs_field = "assigned_user_id"
```

- [74382](): The Case Summary dashlet may not work as expected and cause an internal server error if the account record has a large number of related cases.
- [74350](): An unexpected error may occur when saving a record if there is an issue with the user's default team in the database. As a workaround, run the following query in the instance's team sets table. The affected users will then need to edit their profile to configure their default teams again.

```
UPDATE team_sets
SET    deleted = 1
WHERE  id NOT IN ("select team_set_id from team_sets_teams where
 deleted = 0")
       AND deleted = 0
```

- [73566](): Calculated or dependent fields containing a related() function may not get calculated until after save for activity-type modules (e.g., Notes).
- [73468](): Time-elapse workflow may not trigger as expected when a date field

(e.g., Expected Close Date) in the condition is set to a date in the future.

- [72810](): Filtering the list view search using custom checkbox fields may not work as expected.
- [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.
- [71733](): Printing archived emails via the browser's print option may not display correctly.
- [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.
- [68112](): Matrix-type reports display incorrectly when exported to PDF.

Developer

Please refer to the [Developer Blog in the SugarClub community](https://) for a summary of the changes in version 12.3.0 (Q1 2023) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 12.3.x Supported Platforms](https://).

Upgrade Paths

Sugar Serve and Sugar Sell Upgrade Paths

The following upgrade paths apply to Sugar Serve and Sugar Sell Premier, Advanced, and Essentials:

Package	From Version(s)	MySQL
New Installs		☐
12.2.0-to-12.3.0	12.2.0	☐