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# **Sugar Professional 9.3.0 Release Notes**

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# Sugar Professional 9.3.0 Release Notes

## Overview

This document describes the changes and functionality available in Sugar Professional 9.3.0. Sugar 9.3.0 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 9.3](#) article.

## Administrator and End User

### Feature Enhancements

The following feature enhancements are included in this release:

- [Editing via subpanel preview](#) : Users now have the option to edit a record's fields when previewing the record from a related-records subpanel
- **Primary Contact field** : The Primary Contact field has been added to the Cases module.

### Fixed Issues

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

- [83643](#) : When using Sugar on Chrome or Firefox on a Windows computer, reports may fail to export.
- [83413](#) : In certain circumstances, users may not have access to all the modules as defined by their assigned roles and experience unexpected issues.
- [83218](#) : In certain circumstances, new users created in SugarIdentity via the Cloud Settings console may not sync to Sugar as expected.
- [82939](#) : A new entry gets improperly added to the `team_sets_modules` table each time a record is saved in Sugar, causing the table to grow large and possibly result in unexpected issues.
- [82839](#) : In certain circumstances, the modules to which you have access to in Sugar may not appear as expected.
- [82475](#) : When saving a new quote record assigned to another user, the Assigned To field may incorrectly revert back to the current user who

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created the record.

- [82044](#) : Saving an opportunity record will fail with an error if it contains negative values.
- [81993](#) : In certain circumstances, performing full-text search re-indexes may cause performance issues.
- [81908](#) : Multiple edits to a record may cause redundant elastic search reindexes resulting in performance degradation.
- [80966](#): Records with a custom calculated Datetime field may fail to save with an error if the calculation results in a null value.
- [80698](#) : Calculated fields containing the rollupSum() function may improperly update and display incorrect values each time additional records are loaded in the related module subpanel, and attempting to navigate away from the current record may result in unexpected behavior.
- [80430](#) : SugarCloud sessions may time out with a 500 error due to a database issue.

## Known Issues

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

- [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.
- [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.
- [83301](#) : In certain circumstances, the tooltip (e.g. Create) may continue to persist improperly while navigating through Sugar. As a workaround, reloading the web browser will clear the tooltip from the screen.
- [83277](#) : Sugar licenses that are not revalidated after a renewal or upgrade to version 9.1.0 may cause users and admins to not be able to access certain areas (modules, dashboards) of the Sugar application. As a workaround, re-validate the license via Admin > License Management, or if the problem continues to persist, trigger a save action in Admin > Display Modules and Subpanels.
- [82914](#) : Running reports in instances with a large number of team sets may fail to generate for non-admin users and result in performance issues.
- [82897](#) : The dashboard metadata from a previous version of Sugar may not be compatible after upgrading to version 9.1.0 causing a 500 error to occur in certain circumstances. As a workaround, please contact Sugar Support.
- [82840](#) : Date and datetime fields do not respect the user's preferred format

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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.
- [82693](#) : When importing contacts mapped to new accounts, users may experience unexpected behavior if the system detects an error on the file. As a workaround, import the new accounts into Sugar first then import the contacts.
- [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.
- [82495](#) : Adding quoted line items to a quote incorrectly sends an assignment notification to the current user who created and is assigned to the record.
- [82486](#) : Upgrades may fail when a custom field has conflicting field types defined.
- [82484](#) : Attempting to undo an import may not work as expected and fail for modules containing custom fields.
- [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.
- [82454](#) : Entering duplicate email addresses with different capitalizations (e.g. test@here.com, Test@here.com) into a record (e.g. Contacts) may result in adverse behaviors.
- [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.
- [82230](#) : Exporting a Summation report may fail with an error if the computed derivative (e.g. Count, SUM) is missing in the Choose Display Summaries step.

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- [82050](#) : Web logic hooks may not trigger as expected after save when new records are created.
  - [82038](#) : Clicking on a Home page tab (e.g. Sales) or attempting to sort by a field column on the Legacy dashboard may not work as expected and result in an error.
  - [81999](#): Users may be unexpectedly logged out when requests with out-of-date user\_hash data are sent to the server in close succession.
  - [81929](#) : Report chart drill-through may not work as expected and display an error message (No data available) for reports using the Product Catalog module.
  - [81877](#): Full-text search re-indexes performed from the command line may run out of memory when run on very large data sets.
  - [81722](#) : Sorting the fields by the column header (e.g. Name) in Admin > Studio or Module Builder may result in CSRF errors being written to the log file.
  - [81382](#) : Deleting a target list related to a large number of records may fail with an error.
  - [81339](#) : Generating a report (e.g. Summation with Details) grouped by "Fiscal Quarter" for a custom date field (e.g. Fiscal Quarter: Booking Date) may result in a database failure error.
  - [81335](#) : Importing records in Sugar may fail with a PHP error if the upload directory is not set to the default upload folder in config.php.
  - [81328](#) : Changes made to custom relate fields that are marked as "Audit" in Admin > Studio do not get recorded in the audit log as expected.
  - [81297](#) : If a web-to-lead form gets submitted using an existing email address in Sugar, the email address may not be marked as "Primary" for the generated lead record.
  - [81276](#) : When there are multiple group-by fields in a Summation With Details report, generating the report with a chart or trying to view a dashboard containing the saved report chart dashlet may result in performance issues.
  - [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

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instance.

- [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.
- [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.
- [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.

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- [79686](#) : The List Order field in the Contract Types, Manufacturers, Tax Rates, and Shipping Providers modules does not control the order in which the options are listed in the corresponding fields (Type Name, Manufacturer Name, Shipping Provider, Tax Rate) for the Contracts, Quotes, and Product Catalog modules.
  - [79640](#) : The Home (Sugar cube) icon shifts position in the navigation bar when "Allow users to select modules to appear in the navigation bar" is enabled.
  - [79510](#) : Email addresses are not shown on the import summary screen even though they were properly imported.
  - [79173](#) : When attempting to navigate away from the module or save the record, the Unsaved changes warning message may unexpectedly appear for modules containing custom dependent fields.
  - [79131](#) : When the "Listview items per page" setting in Admin > System Settings contains a large value (e.g. 50 or greater), it may cause an issue with rendering the "Download PDF" and "Email PDF" options in the record view's actions menu. Changing the "Listview items per page" setting to "20" may help resolve the issue.
  - [79108](#) : When editing a record via the list view preview on the intelligence pane, the Resolve Conflict drawer may appear unexpectedly upon save.
  - [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).
  - [77780](#) : Instances using MS SQL may see unexpected behavior due to a



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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

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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.

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- [68112](#) : Matrix-type reports display incorrectly when exported to PDF.

## Developer

The following changes in this release may affect developers:

- This Sugar release uses the v11\_7 REST API version. The following new REST APIs have been added in v11\_7:
  - `/<module>/:record/link/related_activities` : Will return related activity records for a specified record
- The Feedback link has been deprecated and removed from the footer of the Sugar UI.
- **Business hours between dates function** : For Business Centers (used in Sugar Sell and Sugar Serve), new internal functions have been added to calculate business hours elapsed between two dates and times. They both take in a start date and an end date parameter.
  - `getBusinessTimeBetween` : returns a decimal value representing the total time between the two given datetimes based on the business center's hours
  - `getHoursBetween` : returns an array with the results from both of these new functions
- **Sugar Sell**
  - **New fields** : Several new service-related fields have been added to the Accounts, Opportunities, Revenue Line Items, Quoted Line Items, and Product Catalog modules including Service (checkbox), Service Start/End Date, Service Duration, Renewable (checkbox), and Date of Next Renewal.
  - **Pipeline management** : The new fields in Sugar Sell are used to manage new features including calculated end dates, account renewal dates, and renewal pipeline automation. For more information on the new behavior, refer to the 9.3 release notes for Sugar Sell and the [Opportunities](#) documentation for Sugar Sell.
- **Sugar Serve**
  - **Time to Resolution** : Two new fields have been added to the Cases module for Sugar Serve: `hours_to_resolution` and `business_hours_to_resolution`.
    - Type decimal (30 min will be 0.5 hrs)
    - Visible but read-only by default on Record View
    - Available for list views but not shown by default
  - **Resolved Date automatic reset on case re-open** : In the Cases module, "Resolved Date" will automatically clear when the case status is changed from Closed, Rejected, or Duplicate to any other value.

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- There is a config setting `$clear_resolved_date` which can be overwritten in `config_override.php`.
  - By default, it is set to `TRUE`, meaning that the date will be cleared when the status changes from `Closed`, `Rejected`, or `Duplicate` to any other value.
  - If set to `FALSE`, then the date will not be cleared when the status is changed.
- **First Response SLA Met/Not Met calculation** : Sugar Serve will auto-calculate the "First Response SLA Met" field once the field "First Response Sent" has been set to `TRUE` using any method.
    - We have included a step in the stock 9.3 SugarBPM template [Case Follow-Up Date Management](#) where the "First Response Sent" field is set to `TRUE` when the case's status changes from `NEW` to anything. Customers can decide to change this and make it based on other events (e.g. email or note sent). Whatever method customers decide to use as their first-response event, they need to set the "First Response Sent" field to `TRUE`.
    - Once the "First Response Sent" field is set to `TRUE`, all the fields are then evaluated by the bean. The system compares the targeted follow-up date/time vs. the first-response date/time and sets the field "First Response SLA Met" accordingly ("`Yes`" = SLA met or "`No`" = SLA not met).
    - The "First Response SLA Met" field may also be automatically set to "`No`" via the stock 9.3 SugarBPM template [Case Follow-Up Date Management](#). There is a timer on the follow-up date as long as the case's Status = `New`. When the follow-up date/time passes, the field is set to `NO`.
  - **Changes for Gmail to allow users to enable less secure apps** : Note that when customers want to use Gmail or G Suite as Sugar's outbound email, they are blocked by default. Google requires users to either enable two-factor authentication and use an app-specific password or to enable less-secure apps. It appears that Gmail wants applications to implement their OAuth 2 authentication to use their SMTP without enabling less secure apps. On October 30, 2019, Google began removing the setting to "Enforce access to less secure apps for all users." See this article for details: <https://gsuiteupdates.googleblog.com/2019/07/limit-access-LSA.html>. While no changes to Sugar have been made for this issue, it is important for developers to be aware.

## Supported Platforms

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For information on supported platform components, see [Sugar 9.3.x Supported Platforms](#).

## Upgrade Paths

Package	From Version(s)	MySQL
New Installs		<input type="checkbox"/>
9.0.2-to-9.3.0	9.0.2	<input type="checkbox"/>
9.2.0-to-9.3.0	9.2.0	<input type="checkbox"/>

**Last Modified:** 2020-07-16 21:38:55