
Sugar Serve 10.3.0 (Q1 2021) Release Notes

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Overview

This document describes the changes and functionality available in Sugar Serve 10.3.0 (Q1 2021). Sugar 10.3.0 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 10.3](#) article.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in Sugar Serve 10.3.0 (Q1 2021):

SugarLive and Portal Enhancements

- [Chat window in the portal](#): A chat window can now be enabled in the portal so that your customers can chat with a chatbot or your agents using Amazon Connect, which can route new chat sessions to SugarLive.
- [Customized chat theme](#): You can configure the colors, logo, and other elements of the chat window that your customers will see in the portal to match your organization's branding.
- [Portal cases and contacts opened in SugarLive](#):
 - When a customer uses Sugar Portal Chat to connect with an agent, the portal user's contact record is opened in SugarLive when the agent accepts the incoming chat.
 - When a customer connects with an agent in Sugar Portal Chat after using a chatbot to ask about a case, the case record is opened in SugarLive when the agent accepts the incoming chat.
- [Call and chat summary](#): A new panel has been added in SugarLive to let you take notes that are automatically saved during a call or chat with a customer.
- [Easier linking while on a call or chat](#): A new button on Record View dashlets in SugarLive lets you quickly relate a contact and case to the current call or message record; you can see these links in the new Summary panel while working in SugarLive.
- **Automatic call and message creation**: Call and message records are now created automatically in SugarLive and are populated with known details including the related contact and case.

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- **Case sources set automatically:**
 - If a case is created using a chatbot in the [portal chat](#), its Source field is set to "Chatbot".
 - If a case is created using the Quick Create menu while in [SugarLive](#), the Source field of the case is set to either "Phone" or "Chat", based on the type of SugarLive session.
 - [Automatically open the contact for incoming chats](#): Incoming chats from external sources (e.g. an external website) can be configured to provide the customer's name or email address so that SugarLive can search for a matching contact in Sugar and automatically open it.
 - [Click to dial phone numbers in SugarLive](#): If the new Click-to-Call feature is enabled and you are logged in to Amazon Connect, clicking a phone number field will dial the number in SugarLive.
 - [Call transcripts and recordings](#):
 - If you are using Contact Lens in Amazon Connect, the transcript of calls completed in SugarLive is saved in the new Transcript field, including a sentiment value (e.g. "Positive") for each entry.
 - If you are using AWS Lambda, a link to the recording of calls completed in SugarLive is saved in the new Recording field.
 - [Single sign-on](#): SugarLive now supports single sign-on (SSO) with Amazon Connect instances that use SAML 2.0-based authentication so that agents do not need separate Amazon Connect credentials to log in to SugarLive on an SSO-enabled Sugar instance.
 - **Templates and sample contact flow**: A sample contact flow is available for download from your SugarCRM.com account's [Downloads page](#) along with the Lambda functions, Lex bot, and CloudFormation template needed to set up and use certain Serve features, such as a chatbot in Sugar Portal Chat.

Purchase Enhancements

- [Purchase History dashlet](#): A new dashlet is available that shows all purchases made by the account you are viewing. The Purchase History dashlet can be added to consoles and to record view dashboards for any modules that have a relationship with accounts.
- [Rollup calculations for purchases](#): Three new calculated fields - Total Revenue, Total Quantity, and Purchased Line Item Count - are available for the Purchases module, providing a holistic view of an account's purchase history.
- [Time-aware purchased line item status](#): A new calculated field in the Purchased Line Items module indicates if the record (i.e. the customer's product or service) is a past, active, or future purchase.

SugarBPM Enhancements

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- [Combined Start events](#): Start events can now be applied to both new and updated records at once so that it is no longer necessary to create process definitions with multiple start events in most cases.
 - [Link to a process in an email](#): It is now possible to configure Activity elements to send an email to the selected process user with a link to the process awaiting their execution.

Dashboard and User Interface Enhancements

- [Focus Drawers](#): A new icon will appear when hovering over links to Sugar records in the application. On click, a targeted Focus Drawer dashboard reveals a 360 view of the linked record through a set of dashlets that are configurable by admin users and the dashboard owner.
- [Dashboard floating actions button](#): The new floating actions button appears on dashboards throughout Sugar and replaces the dashboard actions menu for common tasks such as creating dashboards, duplicating dashboards, and adding dashlets.
- [Multiple note attachments](#): You can now attach multiple files to notes using the new Attachments field. The system-level "Is Attachment" field can be used to differentiate between directly-created notes and notes that are an attachment to another record (i.e. email, knowledge base article, or other note) in [SugarBPM](#) and the Reports module.
- **Viewing and refreshing reports from dashlets**: Previously available to only the owner of a dashboard, the "View Report" and refresh chart options are now available on the Saved Reports Chart dashlet for all users.
- **Editing records from report drill-through**: Users can now edit records via preview pane when drilling through report charts.
- [Improved console filtering](#): Administrators can now control the fields available as filters for the Cases tab list view in the Service Console by configuring the Search layout in Admin > Studio.
- [Filtering on inactive users](#): You can now locate records assigned to inactive users by filtering on user status.
- **Enhanced filtering for [Meetings](#) and [Calls](#)**: New list view filters show records where the current user is a guest.
- **Added value for call status**: A new value, "In Progress", is available for the Status field on the Calls module.
- **Preserving field height in edit mode**: Text boxes that are expanded in record view remain expanded after switching to edit view.
- **Copying field values without triggering edit mode**: Users can click and drag to highlight and copy text from field values in record view.
- **Resizing dashlets**: Dashlets can now be resized by dragging their sides, bottom, or corners.

Studio and Administration Enhancements

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- [Data Archiver admin utility](#): A new module lets administrators move non-essential records to a hidden archive table or hard-delete them from the database.
 - [Read-only field option](#): Admin users now have the ability to make a field read-only always or conditionally.
 - [More field types available for mass update](#): Admin users can now enable mass update for most field types in Sugar including checkbox, multiselect, and date field types, among others.
 - [New Sugar Logic function](#): A new function for calculated fields, `dayofmonth`, has been added to extract the number of the day of the month from a date or datetime field.
 - **Studio access to relationship-based relate fields**: Previously, relationship-based relate fields could not be edited in Studio. Now, they are in the module's Fields list in Studio, where you can adjust their field-level settings (e.g., enabling them for audit).
 - [Improved click-to-call](#): When the Click-to-Call option (formerly called SkypeOut Integration) is enabled, all phone number fields in Sidecar modules are displayed as clickable links so you can dial out using your computer's default telephony application.
 - **New schedulers**: Two new schedulers have been added. The [Run Active Data Archives/Deletions](#) job performs the archive or delete actions defined by the new Data Archiver module; the [Process Time-Aware Schedules](#) job automatically updates the statuses on purchased line item records.
 - **Package scan health check**: Package Scanner now runs a full health check against module loadable packages before installation.

Fixed Issues

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

- [86157](#): In certain circumstances, the Interactions dashlet may cause an Invalid Module error message to appear in Sugar.
- [85928](#): When creating an opportunity with revenue line items, selecting a product from the Product Catalog dashlet may cause the revenue line item's Assigned To field to incorrectly display the user ID.
- [85904](#): Drilling through report charts may not display the report chart as expected in the intelligence pane of the filtered list view drawer.
- [85822](#): The Projects record view may not display the related record subpanels as expected.
- [85784](#): In certain circumstances, inbound emails may fail to import to Sugar and generate an error.
- [85745](#): Saving an opportunity record containing revenue line items set as a "Service" may fail with an error if the current user's date format is set to

day/month/year.

- [85709](#): Elasticsearch fails to index records when a scheduler (e.g. Prune Database on 1st of Month) fails with an error.
- [85705](#): Performing a global search may improperly create new dashboards assigned to the current user.
- [85613](#): Record view fillers to the left of fields may shrink on smaller browser windows causing the right-column field to improperly move to the left column of the record view layout.
- [85539](#): The body of articles shown in the search results of the Knowledge Base Search dashlet is not limited to 500 characters.
- [85475](#): Cases created via the portal may not be assigned to a user as expected when there is a process definition configured to use the round robin action for portal created cases.
- [85457](#): Clicking a link in the Knowledge Base article may not work as expected and cause the body of the article to appear dark.
- [85344](#): In certain circumstances, a process definition may generate a database query causing the process to fail.
- [85331](#): Performing certain administrative actions (e.g. performing Quick Repair and Rebuild) may result in a 502 error for SugarCloud instances.
- [85286](#): The Sugar licensing data is not validated properly prior to getting added to the database.
- [85234](#): The Prune Database on 1st of Month scheduler job may fail with an error when executed in Sugar 10.x.
- [85232](#): Sugar Enterprise instances may incorrectly contain features (e.g. Change Timers) that are specific to the Sugar Serve license type.
- [84677](#): In certain circumstances, the unsaved changes warning message may improperly display when users attempt to navigate away from the quote record.
- [83975](#): The Date Created and Date Modified fields in the Opportunities record view incorrectly display the values in three separate lines instead of a single line like the other Sidecar modules (e.g. Accounts, Contacts).
- [83969](#): Generating a report containing custom fields and grouped by "Fiscal Quarter" may result in a database failure error.
- [83301](#): In certain circumstances, the tooltip (e.g. Create) may continue to persist improperly while navigating through Sugar.
- [83099](#): Users accessing a record at the same time that the record's assigned teams is being changed may lose access to the record during the save event.
- [83091](#): Report chart drill-through may not work as expected and display incorrect data for users in different timezones.
- [82758](#): Emails sent from Sugar do not use the user's "reply-to" email address as expected and incorrectly defaults to a different address (e.g. primary email address).
- [82737](#): The Password field for Sugar's email settings is improperly limited to a length of 64 characters.
- [82637](#): Health check incorrectly flags versions 6.0.5 and higher of the

wMaps package as incompatible.

- [82636](#): Health check incorrectly flags versions 2.0.1 and higher of the BulkCrudApi package as incompatible.
- [81878](#): The options in the Currency field are not available to select when defining the Process Business Rule.
- [81272](#): Regular users cannot edit the Type Name field in the Contracts record view.
- [80158](#): Having a value of "0" in the Item Name or Display Label of a dropdown list (e.g. account_type_dom) may cause unexpected behaviors in Sugar.

Known Issues

The following known issues are present in version 10.3.0 (Q1 2021). [Case Portal users](#) can use the following links for more details about each issue:

- [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.
- [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.
- [85880](#): The default user email account in Emails > Email Settings cannot be configured to use the Google or Exchange Online mail account if the "Allow users to use this account for outgoing email" option is disabled for the system email settings. As a workaround, the user can create a new outgoing user email account and configure it using Google or Exchange Online.
- [85795](#): When editing the existing inbound email account, the User Name field does not display a value and appears blank in the layout. As a workaround, you can copy the user name value from the inbound email account's detail view and paste it in the edit view when configuring the inbound email account.
- [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.
- [85550](#): In certain circumstances, the funnel chart in reports may display incorrect values.

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- [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.
 - [85458](#): The body of the email does not display as expected when accessing Sugar via Firefox 80. As a workaround, open the Developer Tools console and refresh the page to view the email body.
 - [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.
 - [85396](#): In certain circumstances, administrators are improperly allowed to edit read-only fields in the Users module for SugarIdentity-enabled instances resulting in unexpected behaviors and errors.
 - [85371](#): When team-based permissions are enabled for a module (e.g. Tasks) and the record's Teams field has the Additional Permissions option enabled, the audit log will not display the correct values for changes made to the Teams field.
 - [85368](#): In certain circumstances, users may run into unexpected errors when trying to access certain modules and/or notice modules missing from the navigation bar.
 - [85342](#): When the Assignment Notification Emails template is customized using new variables (e.g. \$account_name), the email notification does not pull in the relevant information as expected and display the variables in plain text instead.
 - [85323](#): The body of the Knowledge Base record may not display in full width as expected.
 - [85301](#): The 10.1 upgrade may create a _overridesubpanel file for custom module relationships to Opportunities, causing the record view to fail to load in the custom module. As a workaround, you can identify the _overridesubpanel file in the following file path of the affected module and delete it, then run a Quick Repair and Rebuild: custom/Extension/modules/<custom_module>/Ext/clients/base/layouts/subpanels/_overridesubpanel...
 - [85267](#): Upgrading to 10.1.0 may fail for instances that have upgrade_history packages installed in a directory other than upload/upgrades.
 - [85233](#): Updating the quoted line item's discount amount via the API does not trigger the related calculations in the quote's worksheet if the discount type is set to "\$".
 - [85215](#): Adding a custom MultiSelect field to the Users module's EditView layout may result in unexpected errors when editing and saving a user record.
 - [85047](#): Moving fields between the Columns and Available Fields sections of Console Settings may not work on Internet Explorer 11.
 - [85046](#): SugarBPM's Round Robin "Set 'Assigned To' by availability" option is not available in Internet Explorer 11.

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- [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.
 - [84896](#): In SugarBPM, if two or more Action elements, either in the same or separate process definitions, modify the same record, it may prevent subsequent processes from being triggered by those actions. As a workaround, for processes with a single Action element, set the Run Order field for each relevant process definition.
 - [84884](#): For SugarIdentity-enabled instances, employee records that are tied to a user record in the Cloud Settings console cannot be duplicated in Sugar.
 - [84808](#): Sugar improperly allows custom fields to be created using the same name in different modules which causes errors when reindexing global search.
 - [84692](#): Certain reports may not generate as expected if the last group-by field is a date (e.g. Opportunities > Week: Expected Close Date) and the report contains a chart (e.g. Horizontal Bar).
 - [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.
 - [84666](#): Upgrades may fail when a customization uses deprecated chart libraries.
 - [84582](#): In certain circumstances, a blank space may appear in place of any dependent dropdown field(s) that are hidden in the record view layout if there is a filler next to the field(s). As a workaround, remove the filler next to the dependent dropdown field(s) in Admin > Studio.
 - [84551](#): Legacy workflows created in Sugar Enterprise continue to remain active and trigger improperly after the customer migrates to Sugar Sell or Sugar Serve.
 - [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.
 - [84357](#): Adding custom Sales Stage dropdown values may cause the tile view's Opportunities by Sales Stage tab to display blank with the "No data available" message. As a workaround, navigate to Admin > Tile View Settings, remove and add back "Opportunities" in the Enabled Modules field, then configure the Opportunities module settings before clicking "Save".
 - [84233](#): Trying to click the records (e.g. calls) in the Planned Activities dashlet may not work as expected and a Download icon may improperly appear instead.
 - [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.

- [83994](#): In certain circumstances, campaign emails sent by regular users may not send as expected and result in unexpected errors. As a workaround, send the campaign as an Admin user or do not click the Delete Test Entries button when sending the campaign as a regular user.
- [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.
- [83847](#): For instances that only have Sugar Sell and/or Sugar Serve license types, the "Workflow Management" (legacy workflow) link improperly appears on the Admin page.
- [83796](#): SugarBPM processes always run after module-level logic hooks and it is not possible to configure them to run before logic hooks.
- [83716](#): Attempting to deploy a package via Module Builder or Module Loader may fail with an error.
- [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.
- [83510](#): In certain circumstances, PHP warning errors may occur for certain SugarCloud instances.
- [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.
- [83178](#): When administrating Sugar Portal, enabling or disabling the "Enable search before opening a case" option does not update the user interface as expected. As a workaround, a Quick Repair and Rebuild must be run for the change to take effect.
- [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.
- [82899](#): Performing a recipient search using an email address does not

return any records as expected for SugarBPM's Send Message events. As a workaround, manually enter in the full email address and press "Enter" or use the selection option to choose the recipient.

- [82843](#): Revalidating the license in Sugar may not work as expected and result in an error for customers using a proxy server.
- [82840](#): Date and datetime fields do not respect the user's preferred format when included on PDFs.
- [82813](#), [81877](#): Performing full-text search re-indexes from the command line or via Admin > Search may run out of memory when run on very large data sets.
- [82810](#): Fields based on non-existent or improperly defined custom field types may cause upgrades to fail.
- [82767](#): Creating fields in Studio may not work as expected and result in an error if "Tracker Actions" is enabled in Admin > Tracker. As a workaround, disable "Tracker Actions" in Admin > Tracker.
- [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.
- [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.
- [82559](#): Certain customizations in Sugar may cause the upgrade to fail.
- [82493](#): Users may be unable to send outbound emails if the "Allow users to use this account for outgoing email" option is disabled via Admin > System Email Settings.
- [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 defect's description on the bug portal to convert the decimal fields.
- [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.
- [82437](#): Drilling through report charts from the Saved Reports Chart dashlet may not work as expected and return incorrect results if the report has a run-time filter applied.
- [82384](#): Deleting note records created from email attachments may not work as expected and continue to persist in the upload directory.
- [82377](#): SugarBPM module field evaluations improperly allow the selection of the "changes", "changes to", and "changes from" operators when "All

Related Records" is enabled. To avoid unexpected behavior, utilize the "is", "is not", or other non-change operators when evaluating all related records in process criteria.

- [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.
- [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.
- [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.
- [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.
- [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.
- [81152](#): Event-based gateways improperly consider activity elements to be complete if the activity gets reassigned to another user via "Select New Process User".
- [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".

- [80968](#): It may not be possible to disable SAML authentication via the user interface after certain actions have been performed on your Sugar instance.
- [80884](#): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message.
- [80865](#): It is not possible to search by the Record Name column in Process Management.
- [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.
- [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.
- [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.
- [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.
- [79752](#): When working with SugarBPM process business rules on Internet Explorer 11, you cannot delete columns from rules in the Rules Builder. As a workaround, please use another supported browser.
- [79715](#): The Follow button does not appear in the Contracts record view as expected.
- [79712](#): The "Sign" and "Get latest" links do not appear as expected in the Documents subpanel of the Contracts module.
- [79704](#): When logged into Sugar with certain languages (e.g. Russian), the list view's Record Actions menu may not appear as expected for some modules (e.g. Dashboards).
- [79698](#): When merging records, fields that are required under certain conditions are required even if the conditions have not been met.
- [79686](#): The List Order field in the Contract Types, Manufacturers, Tax Rates, and Shipping Providers modules does not control the order in which the options are listed in the corresponding fields (Type Name, Manufacturer Name, Shipping Provider, Tax Rate) for the Contracts, Quotes, and Product Catalog modules.

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- [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.
 - [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.
 - [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.
 - [78582](#): Process definitions do not enforce the requirement that multiple paths must converge before an End event.
 - [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.
 - [78315](#): The same Process ID may be used for multiple processes if a

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- process definition's Start condition is triggered by simultaneous events.
- [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 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).
 - [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.
 - [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.
 - [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.
 - [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"
```

- [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.
- [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.

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- [68461](#): Searching by non-primary email addresses in the module's list view (e.g. Accounts) does not pull up results as expected.
 - [68112](#): Matrix-type reports display incorrectly when exported to PDF.

Developer

Please refer to the [Developer Blog in the SugarClub community](#) for a summary of the changes in version 10.3.0 (Q1 2021) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 10.3.x Supported Platforms](#).

Upgrade Paths

Sugar Serve and Sugar Sell Upgrade Paths

Package	From Version(s)	MySQL
New Installs		☐
10.2.0-to-10.3.0	10.2.0	☐

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