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# **Sugar Professional 10.3.0 (Q1 2021) Release Notes**

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# Sugar Professional 10.3.0 (Q1 2021) Release Notes

## Overview

This document describes the changes and functionality available in Sugar Professional 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 Professional 10.3.0 (Q1 2021):

#### Sales-Focused Enhancement

- **Seamless integration with [Sugar Discover](#):** This release natively integrates Sugar Discover's revenue analytics dashlets, eliminating the need for Sugar Discover customers to install the dashlets via Module Loader.

#### Dashboard and User Interface Enhancements

- [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 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

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via preview pane when drilling through report charts.

- [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

- [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 scheduler**: The [Run Active Data Archives/Deletions](#) scheduler job performs the archive or delete actions defined by the new Data Archiver module.
- **Package scan health check**: Package Scanner now runs a full health check against module loadable packages before installation.

## Fixed Issues

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

- [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.
- [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.
- [85457](#): Clicking a link in the Knowledge Base article may not work as expected and cause the body of the article to appear dark.
- [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.
- [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.

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- [82636](#): Health check incorrectly flags versions 2.0.1 and higher of the BulkCrudApi package as incompatible.
  - [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:

- [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.
- [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.
- [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.
- [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

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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.
- [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.
- [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 Professional 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

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values added to the Meeting Type dropdown list in Admin > Dropdown Editor.

- [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.
- [83716](#): Attempting to deploy a package via Module Builder or Module Loader may fail with an error.
- [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.
- [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.
- [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.
- [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.



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- [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.
  - [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

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"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.
- [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.
- [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.
- [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.

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- [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.
  - [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

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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 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"
```

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- [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.
- [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.

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## 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 Ultimate, Sugar Enterprise, and Sugar Professional Upgrade Paths

Package	From Version(s)	MySQL
New Installs		☐
10.0.3-to-10.3.0	10.0.3	☐
10.2.0-to-10.3.0	10.2.0	☐

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