Sugar Professional 8.3.0 Release Notes

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Overview

This document describes the changes and functionality available in Sugar Professional 8.3.0. Sugar 8.3.0 is only available for SugarCloud (Sugar-hosted SaaS) deployments.

Administrator and End User

Feature Enhancements

The following feature enhancements are included in this release:

- **Product Catalog**
  - [Product Catalog Quick Picks dashlet](#) : The Product Catalog Quick Picks dashlet allows you to access products that you recently used or marked as favorites and add them as line items on quotes.
  - **Favoriting Product Catalog records** : Product catalog records can now be marked as favorites via the Product Catalog list view/record view, [Product Catalog Quick Picks dashlet](#). or [Product Catalog dashlet](#).
- [Quoted line item currency for quotes](#) : Users now have the ability to change the line item's currency when creating or editing quotes.
- **Reporting on Product Catalog** : The Product Catalog module is available to use in reports.
- [Exporting Reports](#) : Users can now export all report types.
- [Comment Log](#): The Comment Log field, a shared log of messages, comments, or other text, has been added to the Bugs and Cases modules and is available to be added by administrators to many other modules.

Fixed Issues

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

- **[81635](#)** : When creating a new password due to password expiration, an error message may not appear as expected if the password in the Confirm Password field does not match the new password.
- **[81619](#)** : The Tags field is incorrectly available to add to the Popup Search layout via Admin > Studio.

- 81589 : Accessing the Forecasts module or a forecast-type dashlet (e.g. In Forecast) may unnecessarily rebuild cache files resulting in 500 errors.
- 81567 : Using the REST v10 search API may cause performance issues.
- 81538 : Calculated fields in the Quotes module containing a rollup function (e.g. rollupSum) for product catalog fields may cause the quote's total to not update correctly when the line item's quantity is modified.
- **81445** : In certain circumstances, reassigning a record to another user may not work as expected and result in an error.
- 81422 : Whan quoted line items are added using the Product Catalog dashlet, the default value (e.g. Quoted) set for the Status field may not be respected and display no value in the field.
- 81287: When logged into Sugar with the Czech language, attempting to rename a field label in the List View layout via Admin > Studio may not work as expected.
- 81208, 72671: When logged into Sugar with certain languages (e.g German, French) and editing inline via the list view, the Cancel link and/or the Save button text may not display properly.
- 81146 : The Run Email Reminder Notifications scheduler may fail to send out email reminders for meetings and calls.
- 80844 : The Workflows list view displays no value for the Status field.
- 80064 : When a line item is created directly from a quote's worksheet, the quoted line item record's Assigned To field displays blank.
- 80036 : Creating new account records using the Outlook plug-in may not work as expected and result in an error for users assigned a role with field-level restrictions in the Accounts module.
- 79798 : When performing a search via global search, using shortcut operators such as ampersand (&), vertical bar (|), or hyphen (-) may not return results as expected.
- 79777 : The billing address and shipping address for quotes created via the "Quotes (Bill To)" or "Quotes (Ship To)" subpanel may appear incorrectly if the related record's (e.g. Accounts) billing and shipping address is different.
- **79458** : Subpanels for related legacy modules may not display for the Quotes record view as expected.
- 79328: Saving an opportunity record may fail and result in a 500 error if the value in the currency field (e.g. Likely) includes a trailing space.
- 79243 : Attachments on knowledge base records may not be visible on record view despite having been successfully uploaded.
- 79161 : Modifying a relationship between two records where one of the records is related to a large set of records may result in performance issues and 500 errors.
- 79127 : When creating a list view filter, selecting the My Favorites option may not filter the list view as expected to only display records that you have marked as favorites.
- 78736 : Out-of-the-box dashboards may incorrectly be recreated after deleting it from the home page or intelligence pane.

Known Issues

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

- [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.
- [81151](#) : Report chart drill-through may not work as expected when the report is filtered by a checkbox field.
- [81021](#) : Creating report schedules via duplication copies the related user recipient, preventing users from copying other users' report schedules for themselves.
- **[80829](#)** : Date and datetime fields do not respect the user's preferred format when included on PDFs.
- **[80785](#)** : Global search results may not display as expected on Microsoft Edge and Internet Explorer browsers. As a workaround, use Chrome or Firefox to access Sugar when possible.
- [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.
- **[80430](#)** : On-Demand sessions may time out with a 500 error due to a database issue.
- [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.
- [79947](#) : Calculated fields may not populate when the record has multiple calculated fields using the related() function to the same module (e.g. related ($accounts, field1) and related($accounts, field2)).
- **[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.
- [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.
- [79492](#) : Setting the log level to "Error" may result in multiple relationship errors being written to the log file.
- [79469](#) : When a web-to-lead form is created without including a redirect URL, the visitor may improperly get directed to an error page upon submitting the form.
- [79344](#) : The quoted line item total may not respect the user's preferred currency as expected.
- [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.
- [79166](#) : Session locking may cause performance issues in Sugar.
- [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.
- [78471](#) : Setting the default date format in the user's profile to "mm/dd/yyyy" may cause the time periods on the Forecasts Settings page to incorrectly display "Invalid date".
- [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.
- [78229](#) : Downloading the import file template may take longer than expected for module's containing a large number of records.
- [78128](#) : For dropdown list values, a value's Display Label will improperly revert to a blank value if its Item Name is 0 (zero).
- [78065](#) : Moving a stock field between the columns (e.g. Hidden, Available) for the List View and Subpanel layouts in Studio may result in unexpected behavior.
- [77820](#) : The Visibility Editor window may not load as expected and display an error if there is a large number of dropdown dependencies defined in the visibility editor.
- [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"
```

- [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 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.
- [70024](#) : Scheduled reports may have incorrect or missing charts in the emailed PDF. Select "Print as PDF" from the report's Actions menu to see the updated chart.
- [69957](#) : Large number of activity stream records may cause performance issues.
- [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.

Developer

The following changes in this release may affect developers:

- Sugar's out-of-the-box default dashboard metadata files have been removed. These files specified the default list view and record view dashboards used by Sugar's stock modules. This default information is now stored in the Dashboards module in the Sugar database. There should be

no impact on existing customizations unless they include one of the removed PHP files.
The following files have been removed:
- ./modules/<module>/clients/base/layouts/record-dashboard/record-dashboard.php
- ./modules/<module>/clients/base/layouts/list-dashboard/list-dashboard.php

- Custom Sugar dashboards should no longer be defined via metadata. Customizations should use the Default Dashboards feature instead of defining dashboard metadata. During the upgrade to Sugar 8.3, any pre-existing custom metadata dashboards will be migrated into a default dashboard record that is shared globally and assigned to Admin user. Module-loadable packages that install custom dashboards will need to be updated to remove the custom dashboard metadata since it will no longer be supported.
- The following Sidecar JS libraries have been upgraded.
  - jquery: v1.12.4 -> v3.3.1 ([changelog](#)) ([Upgrade Guide](#))
  - jquery-migrate: v1.4.1 -> v3.0.1 ([changelog](#))
  [jQuery Migrate](#) should help maintain compatibility for custom BWC code using older jQuery APIs. Custom code that uses deprecated jQuery APIs should be updated as soon as possible.
- The following BWC (SugarMVC) JavaScript libraries have been upgraded:
  - jquery: v1.12.4 -> v3.3.1 ([changelog](#)) ([Upgrade Guide](#))
  [jQuery Migrate](#) v1.4.1 -> v3.0.1 ([changelog](#)) should help maintain compatibility for custom BWC code using older jQuery APIs. Custom code that uses deprecated jQuery APIs should be updated as soon as possible.
- As part of the jQuery upgrade, the following jQuery plug-ins needed to be updated to be compatible with v3.3.1.
  - include/javascript/jquery/markitup: v1.1 -> v1.1.15 ([changelog](#))
  - include/javascript/pmse/lib/jquery.layout-latest.js: v1.3.0 -> v1.6.3 ([changelog](#))
  - include/javascript/jquery/jquery.timepicker.js: 1.8.8 -> 1.11.14 ([changelog](#))
  - include/javascript/jquery/bootstrap/bootstrap.min.js (v2.0.0) is removed and replaced by include/javascript/twitterbootstrap/bootstrap.min.js (v2.2.1) ([changelog](#))
- Some code changes have been made to ensure future compatibility with PHP 7.3. As a result, the following PHP libraries were updated. If you have custom code that uses these libraries, you should verify that your customizations are still compatible.
  - doctrine/dbal: 2.7.1 → 2.8.0 ([changelog](#))
  - ramsey/uuid: 2.9.0 → 3.8.0 ([changelog](#))
  - symfony/{cache,console,framework-bundle,security-core,security-csrf,translation,validator}: 3.4.8 → 3.4.16 ([changelog](#))
  - tedivm/jshrink: 1.1.0 → 1.3.1 ([changelog](#))

- The following PHP library has been updated. If you have custom code that uses this library, you should verify that your customizations are still compatible.
    - onelogin/php-saml: v2.11 -> v3.0 ([changelog](#))
- The following JavaScript library was updated in this Sugar release. If you have custom code that uses this library, you should verify that your customizations are still compatible.
    - moment: v2.11.2 -> v2.22.2 ([changelog](#))
- As part of the changes to ensure future compatibility with PHP 7.3, some changes have been made to the following vendor libraries for PHP 7.2 and 7.3 compatibility without upgrading them. If you have custom code that uses these libraries, you should verify that your customizations are still compatible.
    - Smarty
    - XTemplate
    - HTMLPurifier
- This Sugar release introduces a SugarConfig setting to control if shortcut global search operators should be used. These operators are: '&' for AND, '|' for OR, and '-' for NOT. These shortcuts can interfere with attempts to search for text that includes these characters. For example, searching for "Alcatel-Lucent" will be interpreted as "Alcatel NOT Lucent" and would exclude an exact match from search results. If this is an issue, Sugar administrators can now use the following SugarConfig setting to disable shortcut operators: $sugar_config['gs_use_shortcut_operator'] = false;
- This Sugar release introduces the v11_4 REST API version. The following new REST APIs have been added in v11_4:
    - GET rest/<module>/<id>/link/<link_name>/leancount

Please refer to the REST API documentation in the Developer Guide for more details on these API endpoints.
- The following jQuery plugins are deprecated and will be removed in a future Sugar release. They are currently unused by core Sugar application. Please verify that JavaScript code customizations do not rely on these deprecated libraries.
    - include/javascript/jquery/jquery.dataTables.customSort.js
    - include/javascript/jquery/jquery.dataTables.min.js
    - include/javascript/jquery/jquery.droparea.js
    - include/javascript/jquery/jquery.elementReady.js
    - include/javascript/jquery/jquery.highLight.js
    - include/javascript/jquery/jquery.hotkeys.js
    - include/javascript/jquery/jquery.hoverIntent.js
    - include/javascript/jquery/jquery.hoverscroll.js
    - include/javascript/jquery/jquery.popoverext.js
    - include/javascript/jquery/jquery.watch.js
- The deprecated JIT chart library has been removed in this Sugar release. The JIT chart library was deprecated in Sugar 7.10 and has been replaced by [Sucrose charts](#). Please ensure you have removed any code that uses JIT

charts prior to upgrading.
The following directory has been removed in this Sugar release:
- ./sugarcrm/include/SugarCharts/Jit
- As part of new Comments Log field, Sugar now includes a CommentLog module that supports only the following REST API endpoint: GET /rest/CommentLog/<GUID>
POST, PUT, and DELETE are not supported.
- In Sugar user interface customizations, replace any usage of the LBL_REPORT_GRAND_TOTAL key with LBL_GRAND_TOTAL key instead. The LBL_REPORT_GRAND_TOTAL key will be removed in a future Sugar release.
- The following REST API endpoints were added in this Sugar release: GET /PdfManager/generate

Supported Platforms

For information on supported platform components, see Sugar 8.3.x Supported Platforms.

Upgrade Paths

Package	From Version(s)	MySQL
New Installs		☐
8.0.2-to-8.3.0	8.0.2	☐
8.2.0-to-8.3.0	8.2.0	☐
8.2.1-to-8.3.0	8.2.1	☐

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