Sugar Ultimate 11.3.0 (Q1 2022) Release Notes

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Overview

This document describes the changes and functionality available in Sugar Ultimate 11.3.0 (Q1 2022). Sugar 11.3.0 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 11.3](#) article.

Feature Enhancements

The following feature enhancements are included in Sugar Ultimate 11.3.0 (Q1 2022):

UI/UX Enhancements

- **Updated user interface**: We have revamped Sugar for a more modern look and feel! The improvements include a sharper font and updates to UI elements in dashboards, dashlets, list views, record views, administration, and dark mode.
- [New chart graphics](#): Graphic charts for reports and dashlets are now rendered by a new library for data visualization. Enjoy a more robust color palette, faster loading speeds, slick animations, and two new dynamic chart types: Donut and Area Treemap.
- **Persistent list view column order and subpanel layout**: [Subpanel ordering](#) as well as [list view](#) and [Historical Summary](#) column arrangement and settings are now stored in the database for each user so that they persist even after your browser's cache is cleared or you log in from a different device.
- **"Loading" alert can be dismissed**: There is now an "X" you can click on "Loading…" pop-ups to remove persistent alert boxes.

Sales and Service-Focused Enhancements

- **Improved [Sugar Market](#) and Sugar Ultimate Integration**
  - [Timeline integration for Sugar Market](#): A unified view of Sugar Market and Sugar Ultimate touchpoints can now be seen in the Timeline dashlet on Account, Lead, and Contact record views. The lead and contact interactions captured through Sugar Market are

integrated into the Timeline via Sugar Market sync, providing CRM users visibility into the customers' entire journey and eliminating the manual work of piecing these activities together.
- **Smarter lead-conversion handling of Sugar Market activities**: Sugar customers who are integrated with Sugar Market can set the "Lead Conversion Option" to "Move" in Sugar's System Settings to move related Event, Landing Page, and Web Activity records to the converted contact record along with the lead's related CRM activity records.
- **Forecasting at the opportunity level**: A new field in the Opportunities module, "Forecast", lets you cascade the Forecast value to the eligible revenue line item fields while creating or editing an opportunity.
- **Total the value of likely revenue line items included in forecast**: A new field in the Opportunities module, "Forecasted Likely", totals the value of revenue line items' Likely fields that have been included in the forecast.
- Lead Conversion **improvements**
  - **Add limitless revenue line items**: You can now add as many revenue line items as you would like when creating an opportunity during lead conversion. Previously, you were limited to one.
  - **View and add product catalog records**: The Product Catalog and Product Catalog Quick Picks dashlets are now shown in the Convert Lead layout and can be used to add products to the Revenue Line Items subpanel.
  - **Cascade opportunity values during lead conversion**: The ability to cascade values from the opportunity to revenue line items is now available when creating an opportunity during lead conversion.
- **Escalation improvements**
  - **Importing escalations**: It is now possible to use the import wizard to import escalation records into Sugar.
  - Related account automatically added to escalations: When escalating an account, case, or opportunity, the record's related account (i.e., an account's Member Of field or a case or opportunity's Account Name field) is automatically added to the escalation.
- **Send scheduled reports as CSV**: As an alternative to PDF, you can now schedule a report to be sent as a CSV file - or as both a PDF and a CSV - by changing the File Type(s) field on the Report Schedules record view.
- Preview products from the Quick Picks dashlet: A preview icon has been added to the Product Catalog Quick Picks dashlet that allows users to easily view the product details prior to adding it as a line item.
- **Improved authoring for Knowledge Base articles**: Several layout changes to the Knowledge Base module's record view and Create drawer have been made to improve the authoring experience.
- Web-to-lead form Redirect URL options: You can now specify whether to use a GET or POST request for a web-to-lead form Redirect URL and whether to include the form's data in the redirect request.

- **Tasks added to Timeline dashlet**: Users can now view the record's related tasks, create new tasks, or filter to refine the related tasks in the Timeline dashlet.

Studio and Administration Enhancements

- Re-designed Admin page: To match Sugar's updated look, the Admin page's user interface has been refreshed to give it a clean style, new icons, and easier navigation.
- **Admin page search**: A search bar has been added to the top of the Admin page so you can quickly find utilities (e.g., System Email Settings, Studio) by searching for keywords.
- Copy user preferences, dashboards, and filters to other users: Admins can save time setting up new users, teams, and roles by broadcasting the setup of an existing user.
- **Dropdown-conditional record view layouts**: Administrators can now define record view layouts that will change based on the value selected from a given dropdown field on the record.
- **Easier translation of field labels in Studio**: When setting localized-language labels in Studio, administrators will now be able to see the display label in their preferred language, too, to facilitate the translation process.
- **New Sugar Logic function**: forecastOnlySalesStages exclusively returns the values of included sales stages for the Forecast module from the Sales Stage dropdown list (sales_stage_dom).
- **Added CSP directives**: The Content Security Policy Settings page has been expanded to include additional basic (e.g., 'frame-ancestors') and advanced (e.g., 'frame-src', 'script-src') CSP directives.

Calendar Enhancements

- Calendar Scheduler dashlet: The new dashlet can be configured to display your preferred calendars on dashboards throughout Sugar.
- Define your "calendar day": You can set a start and end time for your default visible hours in the Define Calendar Day dialog box. The calendar day will be reflected in day, week, work week, and timeline views.
- Set first day of week for calendar: The First Day of Week setting in your user profile is now respected by Sidecar Calendar.
- Re-send invites on update from Calendar: When you edit a meeting or call event using drag-and-drop on the calendar, you can now choose "Save and Send Invites" in the pop-up message to send system-generated email updates to meeting or call invitees.
- My Calendars panel shows calendars for my teams: The My Calendars panel now only shows calendar records for the teams that you belong to.

- Show all calendars: Check the Select All checkbox in the "My Calendars" and "Users and Team Calendars" panels to show all of their calendar events overlaid.
- Smarter double-click events in Calendar: The user experience has been refined to better handle when a calendar's "Double-click event" option is set to redirect to a related module.
- Usability improvements for Date jumper: When the calendar is in week, work week, timeline, agenda, or scheduler view and you select a date from the Date jumper, the calendar will maintain the view type when displaying the new date.

Fixed Issues

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

- 88464: SugarLive does not match the incoming phone number to the related contact or account record as expected.
- 88427: After upgrade, editing any previously created note records containing attachments may improperly cause the record to not appear in the related module's (e.g., Contacts) Notes subpanel as expected.
- 88411: An assignment notification email is improperly sent when a user adds an attachment to a note record they are assigned to in Sugar.
- **88403**: Having more than 22 users or teams in Sugar may cause unexpected behavior when attempting to add a user or team calendar in the Calendar module.
- 88363: When logged into Sugar with certain languages (e.g., Spanish, French, German), some of the option labels may not display correctly in the Calendar module.
- 88344: Attempting to generate a report may fail and result in a 500 error when editing or copying existing reports.
- 88293: When viewing Sugar in dark mode, the Module dropdown field when editing a PDF template in Admin > PDF Manager appears grey and cannot be edited.
- 88280: Changes made to the bottom border color of the mega menu in Sugar may not display correctly after upgrading to Sugar 11.2.0.
- 88245: Creating a custom relationship to "Activities" in Admin > Studio may not work as expected and display an error.
- 88186: Copying an escalated record causes the Escalated badge to appear on the copy even though the record has no related escalations.
- 88113: Adding a new revenue line item from an existing purchased line item may incorrectly overwrite the renewal opportunity's revenue line item with the add-on price and quantity.

- **88092**: If a note or case has more than five attachments, only the first five are displayed.
- **88086**: Sidecar calendar "Double-click event" options that are intended to redirect user to a related module do not redirect user to the related module.
- **88085**: Editing the Calendar Templates tab by clicking the pencil "edit" icon does not always retain changes after saving Sidecar calendar records.
- **88035**: Certain custom language files get altered during the upgrade causing display labels to appear incorrectly in Sugar.
- **87983**: The "Merge to Doc" and "Merge to PDF" actions for Doc Merge are not available from list view Record Actions menus as expected.
- **87972**: Attempting to integrate an external calendar app with the Sugar calendar using the iCal Subscription URL does not work as expected.
- **87967**: Attempting to expand panels when engaging in a SugarBPM approval process may not work as expected.
- **87960**: For instances that use SugarIdentity, having the Administration page open in Sugar when initiating the impersonation session in SugarCloud Settings may cause the impersonation to fail with an error.
- **87952**: The import file template for certain modules (e.g., Contacts, Cases, Opportunities, Revenue Line Items) incorrectly displays the Account Name column twice, requiring both fields to be mapped for import.
- **87949**: Creating contacts via vCard may not work as expected and fail with an error.
- **87899**: When Sugar is loaded via an iframe, accessing legacy modules may result in an error.
- **87802**: Enabling the Proxy settings without populating the required "Proxy Host" and "Port" fields incorrectly saves, causing loss of access to Sugar.
- **87442**: Calculated date fields may not work as expected between 23:45 and 00:00 when using UTC timezone.
- **87387**: In certain circumstances, updating the currency conversion rate may cause unexpected performance issues with schedulers.
- **87126**: When drilling through report charts, the filtered list view may display a different record count than what is shown on the chart depending on the user's timezone.
- **87101**: When a case's Resolved Date field gets cleared, the field gets auto-populated with an incorrect date value instead of remaining blank.
- **86696**: Selecting the Edit Report option in the Reports list view's Record Actions menu may fail to load the report as expected.
- **86677**: When installing packages via Module Loader, the text on the License screen may not be formatted correctly making it hard to read the license agreement.
- **86646**: Note attachments may not display in the Notes subpanel as expected for any notes created after upgrading to version 10.3 or higher.
- **86478**: The Data Archiver in Sugar cannot be used to properly delete pmse_bpm_flow records from the database.
- **86362**: Adding a custom read-only dependency to a module (e.g. Quotes)

may cause unexpected issues when attempting to preview a record in the module.

- [84295](): Regular users may not be able to filter the Emails list view using the Inbound Account field as expected.
- [83510](): In certain circumstances, PHP warning errors may occur for certain SugarCloud instances.
- **[83426]()**: Filtering reports using the Knowledge Base module's External Article field may not work as expected and result in unexpected issues.
- [81812](): Greater than and less than symbols do not display correctly in the description for cases created from inbound emails.
- [81703](): The Developer Mode option is available to enable in Admin > System Settings for SugarCloud instances.
- [80884](): Viewing a shared dashboard containing the Forecast Bar Chart dashlet may display a "Loading..." message that continues to persist.
- [78672](): Studio incorrectly allows a dropdown list to be created using the same name as an existing dropdown list, causing data issues for records using the original list.
- [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.

Known Issues

The following known issues are present in version 11.3.0 (Q1 2022). [Case Portal users]() can use the following links for more details about each issue:

- [89504](): Sugar dashlets do not display in Firefox or Safari browsers when using Discover 9.0 with Sugar 11.3 or lower due to changes in the Content Security Policy. To view the dashlets, you can:

    - Upgrade to Sugar 12.0 or higher,
    - Request that an admin add the following line to "Trusted Domains ('default-src')" in Admin > Content Security Policy Settings: wss://*.sugarapps.com wss://*.sugarapps.com.au wss://*.sugarapps.eu
- [88808](): The contact record's related tasks may not appear in the Contact Timeline dashlet as expected.
- [88723](): The Calendar Scheduler dashlet on a shared dashboard does not filter events based on the current user when a transferable filter (e.g., My Calls) is used. Displayed events reflect the user who added the dashlet to the shared dashboard.
- [88587](): The titles used for left-hand Calendar panels may not properly set users' expectations for the calendars that are available.

- [88565](): The Save and Cancel buttons are missing in the Project Tasks edit view.
- [88532](): When sending emails using an email template containing an attachment, the attachment does not get included in the email as expected.
- [88261](): Attempting to download a PDF file may fail if the PDF template contains an image that is hosted on a site using "HTTPS" in the URL. As a workaround, use an image that does not contain "HTTPS" in the URL.
- [88098](): Sorting certain module list views (e.g., Contacts) by the Account Name column may not display the records in the correct alphabetical order as expected.
- [88055](): Users may experience unexpected behaviors when using Sugar via the Firefox browser. As a workaround, access Sugar using Chrome or Microsoft Edge browsers.
- [87908](): For instances that use SugarIdentity, the Reset Multi-Factor Auth option improperly appears during a user impersonation session.
- [87896](): Sales type modules incorrectly have the base_rate field defined as a TextArea data type field instead of a Decimal field causing unexpected issues when generating reports in certain circumstances.
- [87880](): The default system currency incorrectly displays "US Dollars" as the currency name even though the system currency is changed to a non-USD currency (e.g., AU Dollars) in Admin > Locale.
- [87701](): Naming a custom field "processed" causes web logic hooks to fail to fire because it conflicts with Sugar's internal logic hook handling. As a workaround, use a different, un-reserved string as the field name.
- [87602](): In Sugar Enterprise, portal customization settings for the following features in Admin > Sugar Portal > Theme Portal are available but not applicable to the portal: the search bar, the banner, and the dashboard.
- **[87601]()**: In Sugar Sell, portal customization settings for the following features in Admin > Sugar Portal > Theme Portal are available but not applicable to the portal: the search bar, the banner, the New Case button, and the dashboard.
- [87477](): Removing the Discount Amount field then re-enabling the field in Admin > Quotes Configuration may cause the Discount Amount field to not display correctly when creating quoted line items on the quote worksheet. As a workaround, navigate to Admin > Quotes Configuration and click "Restore Defaults" under the Worksheet Columns section and be sure to have the Discount Amount field enabled.
- [87232](): In certain circumstances, duplicate email campaigns may be sent out multiple times from the system.
- [87100](): Creating an email template with an attachment does not save the attachment as expected.
- [87018](): Hard deleting note records via the Data Archiver module does not delete the record's file attachments in the upload directory as expected.
- [86849](): In certain circumstances, refreshing the browser may improperly change the order of dashlets on the dashboard.
- [86836](): When making changes in the Configure Summary Panel drawer of

the SugarLive configuration view, opening a module in the navigation bar does not warn you before discarding your changes.

- [86702](): Resetting a user's password may not work as expected and display an error for instances that have the System-Generated Passwords feature enabled in Admin > Password Management. As a workaround, disable the System-Generated Passwords feature and manually reset the user's password.
- [86493](): Modifying the Preview layout for the Notes module prior to upgrading to version 10.3 may cause the Attachments field in the layout to not display multiple note attachments as expected. For information on the workaround, refer to the defect's description on the bug portal.
- [86364](): In certain circumstances, the report chart in the Saved Reports Chart dashlet may not display using the same sort order as the original report.
- [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.
- [86333](): Disabling the "Allow users to use this account for outgoing email" option in Admin > System Email Settings may result in unexpected behavior in Email > Email Settings.
- [86285](): In certain circumstances, users may experience unexpected behaviors when attempting to expland a subpanel or edit an empty Subpanel layout in Admin > Studio. For information on the workaround, refer to the defect's description on the bug portal.
- [86256](): Portal users may be unable to drag and drop files as attachments for Notes in the Sugar Portal.
- [86255](): When SugarLive is open, navigating to the Admin page in Sugar may not work as expected. As a workaround, navigate to a modules list view while SugarLive is open then open SugarLive again and navigate to the Admin page.
- [86010](): Auditing relate fields connected to 1:1 relationships only audits changes on one side.
- [85962](): Dashlets with filters on a shared dashboard may not be accessible to members of the associated team(s) as expected.
- [85673](): Installng a custom module that was built and exported from Module Builder may fail to install with an error.
- [85589](): Saving the SAML settings may fail with an error "Maximum Length should be positive value" when the maximum length is not set for Sugar password requirements.
- [85533](): If you have multiple tabs open when a call or chat ends in SugarLive, the Create drawer for the call or message record opens in every tab, resulting in duplicate records being created.
- [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.
- [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.
- [85246](): Errors may get logged in the system after upgrading or installing Sugar when certain license data is missing.
- [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.
- [84987](): User assigned to the Service Console and/or Renewals Console cannot configure the module tab drawer as expected to add or remove dashlets.
- [84909](): Hyperlinks are not clickable in text area fields for Legacy modules (e.g. Documents). As a workaround, add"https://" in the URL (e.g. https://www.example.com) for Legacy modules and the hyperlink will then be clickable.
- [84884](): For SugarIdentity-enabled instances, employee records that are tied to a user record in the Cloud Settings console cannot be duplicated in Sugar.
- [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.
- [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.
- [83997](): Adding additional panels/tabs or removing the Show More panel in the Record View Layout in Studio may cause the record view layout to display incorrectly. As a workaround, restore the default layout in Admin > Studio.
- [83985](): When the "Field Name Placement" user preference is set to "Beside Field Value", some labels will remain above the field value for the Calls and

Meetings modules.

- 83880: Changes made to role-based view layouts are not applied to users assigned to the role. As a workaround, perform a Quick Repair and Rebuild for the change to take effect.
- 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.
- 83461: Sugar licenses that are not revalidated after purchasing additional seats or a renewal may result in unexpected behavior with list view filters. As a workaround, re-validate the license via Admin > License Management.
- 83425: Custom Date fields in the PDF template may not respect the user's preferred date format.
- 83335: Performance issues may occur for instances that have a number of related calculated fields, legacy workflows, and SugarBPM processes that trigger at the same time.
- 83328: Generating reports may result in a database error for Sugar instances using MySQL 5.7 if the ONLY_FULL_GROUP_BY setting is enabled. As a workaround, disable sql_mode=only_full_group_by in the MySQL server configuration.
- 82840: Date and datetime fields do not respect the user's preferred format when included on PDFs.
- 82810: Fields based on non-existent or improperly defined custom field types may cause upgrades to fail.
- 82756: Upgrades fail when a filter exists for a module that has been removed.
- 82742: The Forecast Bar Chart Dashlet may not load as expected in shared dashboards.
- 82486: Upgrades may fail when a custom field has conflicting field types defined.
- 82468: Custom decimal fields may prevent upgrades from completing and result in invalid alter queries being generated. As a workaround, use the queries described in the defect's description on the bug portal to convert the decimal fields.
- 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.

- [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.
- [81722](): Sorting the fields by the column header (e.g. Name) in Admin > Studio or Module Builder may result in CSRF errors being written to the log file.
- [81382](): Deleting a target list related to a large number of records may fail with an error.
- [81339](): Generating a report (e.g. Summation with Details) grouped by "Fiscal Quarter" for a custom date field (e.g. Fiscal Quarter: Booking Date) may result in a database failure error.
- [81297](): If a web-to-lead form gets submitted using an existing email address in Sugar, the email address may not be marked as "Primary" for the generated lead record.
- [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.
- [80968](): Attempting to disable SAML authentication via Admin > Password Management may not work as expected in certain circumstances.
- [80865](): It is not possible to search by the Record Name column in Process Management.
- [80759](): In PDF templates that contain more than one href link, only the first link works.
- [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.
- [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.
- [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.
- [78709](#): Users assigned a role with Delete, Edit, or Export permission set to "Owner" may improperly be restricted from downloading and emailing PDFs.
- [78600](#): Special characters are improperly allowed to be entered in dropdown lists' item names.
- [78582](#): Process definitions do not enforce the requirement that multiple paths must converge before an End event.
- [78527](#): Inline editing a TextArea field via the subpanel may not work as expected. Reloading the web browser will resolve the issue and allow the user to inline edit the field properly.
- [78315](#): The same Process ID may be used for multiple processes if a process definition's Start condition is triggered by simultaneous events.
- [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.
- [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.
- [72581](): Attempting to merge records in modules containing required dependent fields may not work as expected.
- [71848](): When a large number (e.g. 60) of PDF templates are available in a module, users may not be able to scroll through the full list of templates via the "Download PDF" or "Email PDF" options in the record view. As a workaround, changing the screen resolution or reducing the number of templates may help resolve the issue.
- [71733](): Printing archived emails via the browser's print option may not display correctly.
- [68985](): Custom relationships created between a module and the Activities module via Admin > Studio cannot be deleted as expected.
- [68975](): Changing the order of subpanels via Admin > Display Modules and Subpanels does not preserve the order upon save.
- [68112](): Matrix-type reports display incorrectly when exported to PDF.

Developer

Please refer to the [Developer Blog in the SugarClub community]() for a summary of the changes in version 11.3.0 (Q1 2022) that may affect developers.

Supported Platforms

For information on supported platform components, see [Sugar 11.3.x Supported Platforms]().

Upgrade Paths

Sugar Ultimate, Sugar Enterprise, and Sugar Professional Upgrade Paths

Package	From Version(s)	MySQL
New Installs		☐
11.0.2-to-11.3.0	11.0.2	☐
11.2.0-to-11.3.0	11.2.0	☐

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