
Sugar Professional 6.7.0 Release Notes

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Overview

This document describes the changes in Sugar Professional 6.7.0.

Sugar 6.7 is available for Sugar On-Demand (Sugar-hosted SaaS) deployments only.

New Features

New features, enhancements, and other changes in Sugar 6.7.0 are as follows:

Forecasting Enhancements

Sugar 6.7.0 features the first phase of the new Forecasting module which includes the following:

- Sales representative worksheet : This worksheet contains all Opportunities assigned to the user based on the time period and the Opportunity close date. As a Sales representative, you have the ability to:
 - Navigate between time periods to view previous and past opportunities
 - Choose to include or exclude each opportunity in the forecasting worksheet
 - Inline edit opportunity amounts and probabilities
 - Save drafts or commit numbers to your manager
 - View previous commits within the time period in the commit log
 - Filter information based on time period and forecast range
- Sales manager worksheet : This worksheet displays managers' direct reports' committed numbers and opportunities as well as the manager's opportunities. As a Sales manager, you have the ability to:
 - Work with your own opportunity records and committed numbers
 - Create adjusted numbers based on the committed numbers from direct reports
 - Drill down to all the worksheets and opportunities of the employees in your management chain
 - Navigate between time periods to view previous and past forecasts and opportunities
 - Assign quotas to your reportees for each time period
 - Save drafts or commit worksheet numbers to your manager
 - View recently updated records and monitor changes to numbers in the

commit log

- Intelligence pane : Located on the right side of the Forecasting pages, this pane displays additional information such as:
 - Projected table : Enables users to assess their numbers and pipeline in comparison to their quota and projected wins. This table is useful to play out what-if scenarios when assessing what is needed to achieve their quota.
 - Charts : Visual representation for one's personal opportunities or, in the case of a manager, one's team's committed numbers. The totals are compared to the quota in both the cases which enables users to assess their progress.
- Administration : Before the Forecasting module may be used, an administrator user makes several configurations via Admin > Forecast:
 - Time Periods : Quickly define forecasting time periods to match your organization's fiscal year and frequency of quota cycles. Control the number of past and future time periods users may access.
 - Ranges : Specify the opportunity probabilities which will cause opportunities to be initially included or excluded on forecasting worksheets.
 - Scenarios : Specify if you wish to have opportunity records' Best Case and/or Worst Case fields available on the forecast worksheets.

Please note that user roles are only able to allow or deny access to the entire Forecasts module. Module and field-level role restrictions for Opportunities, Products, Quotas, Worksheet and TimePeriod modules are not respected in the Forecasts module.

For more information, please refer to the [Forecasts](#) documentation in the Application Guide and the [Forecast Configuration](#) documentation in the Administration Guide.

Miscellaneous Changes

Additional changes in Sugar 6.7.0 include, but are not limited to, the following:

- New RacerX theme : The Classic theme has reached end of life. Instances with "Classic" as the default theme will automatically use the RacerX theme after upgrade.
- Improved import performance: Improved import functionality to speed up processing of data.

Known Issues

The following are known issues with Sugar 6.7:

- Instances utilizing the Pardot integration will need to upgrade to the latest Pardot release (version 35 or later), which is available [here](#).
- 59109 : Sales managers' "No Opportunities" checkbox available in User Profile > Advanced is not respected in the Forecasts module. Checking this box will not prevent the user from seeing a row and a worksheet for their own opportunities.
- 59213 : Renaming the Forecasts module in Admin > Rename Modules does not affect all instances of the word "Forecast".
- 61026 : Sorting by opportunity names starting with the same letter in an upper or lower case may result in a different order in the Forecasts module than in the Opportunities module.
- 61232 : After an opportunity is first loaded to the Forecasts module, any updates to the opportunity's probability will no affect its forecasting range. The opportunity will retain the original range designation throughout the sales cycle according to its original probability.
- 61233 : Exporting opportunity worksheets from the Forecasts module will export all of the current opportunities without respecting any filters being used.

Fixed Issues

Due to the high volume of bugs fixed in Release 6.7.0, only bugs with escalations and high priorities have been listed below:

- 32064 : Setting a relationship between ProductBundles and Quotes or Products and ProductBundles using an API results in a PHP error.
- 59604 : Full Text Search does not display search results when the input string contains the "@" character.
- 60328 : Older versions of the REST API unable to retrieve employee records.
- 60363 : Sugar logic dependent dropdown has the ability to incorrectly affect dropdown options for fields of other modules.
- 60704 : Newer versions of PHP may cause unexpected warnings.
- 61121 : Task's list view displays only the first two words of a related contact's name when the field is placed as the first column.
- 61650 : Report charts based on count do not display or sort correctly.

For more information on a bug or to provide feedback, please log into the [SugarCRM Bug Tracker](#).

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- To view the complete list of bugs fixed in this specific release, run a search using "6.7.0" in the Targeted Release field.
 - Look for the bugs marked "Fixed" in the Resolution field.
 - To report a new issue found in this release, use "6.7.0" in the Found in Release field.
 - Check the Bug Tracker for known issues prior to submitting bugs. You will be able to update existing bugs with additional information, as necessary.

Supported Platforms

For information on supported platform components, see [Sugar 6.7.x Supported Platforms](#).

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