
Sugar Professional 6.7.2 Release Notes

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Overview

This document describes the changes in Sugar Professional 6.7.2.

- Fixed issues in versions 6.5.13 and 6.5.14 will be included in 6.7.2.
- Sugar 6.7.2 is available for Sugar On-Demand (Sugar-hosted SaaS) deployments only.
- For information on Sugar Plug-ins download and installation, please refer to .

Feature Enhancements

Enhancements to existing features for Release 6.7.2 are listed below:

- Contact emails rollup now optional : Administrators may now specify whether or not all emails related to contacts should appear in the history subpanels of the account records associated to the contacts. For more information, please refer to the [Developer Tools](#) documentation in the administration guide.
- Fiscal year and quarter in reports : Administrators may specify a fiscal year start date which will be used to enable fiscal year and quarter filters and groupings in reports. For more information, please refer to the [Reports](#) documentation in the application guide.
- Related function and calculated fields : The related function may now take a calculated field as a valid argument when creating Sugar Logic formulas.
- Currencies and exchange rates : Improved support for creating quote and opportunity records in currencies other than the system default currency. For more information, please refer to the [Currencies](#) documentation in the administration guide:
 - Current exchange rates for open business : Exchange rates are now stored on each record and kept current with updates made in Admin > Currencies.
 - Frozen exchange rates for historical accuracy : When an opportunity or quote record enters a closed status, the record's exchange rate is frozen to ensure historical accuracy.
 - Transactional and standardized amounts : Quotes and Opportunities list views now display both a transactional amount using each record's chosen currency as well as a standardized amount using the system's default currency. For more information, please refer to the [Quotes](#) and documentation in the application guide.

Known Issues

The following are known issues with Sugar 6.7.2:

- 59213 : Renaming the Forecasts module in Admin > Rename Modules does not affect all instances of the word "Forecast".
- 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.
- 61232 : After an opportunity is first loaded to the Forecasts module, any updates to the opportunity's probability will not affect its forecasting range. The opportunity will retain the original range designation throughout the sales cycle according to its original probability.
- 64613 : Reports filtering by date fields using the quarter, fiscal quarter, and fiscal year pre-defined filters adjust for timezone causing records falling near the beginning or end of the period to be incorrectly included or excluded.

Fixed Issues

The fixes for Release 6.7.2 are detailed below:

- 50283 : Custom module subpanels do not display the correct currency symbol when the user has chosen a non-system-default currency for the record.
- 52480 : Convert lead process does not respect unrequiring the Accounts module via Studio.
- 54688 : Attempting to view the Resource Report from a project's Gantt chart results in an error.
- 61502 : Custom date fields in the Projects module prevents a project from being saved as a template and vice versa.
- 61702 : Custom issue-type modules related to cases create new cases during import rather than linking to existing case records.
- 61824 : Adding a sort order to a summation report causes the displayed grouping values to be incorrect.
- 61842 : PDF templates are not displayed in alphabetical order when choosing for PDF generation.
- 62078 : Calculated fields using the Contracts module's contract_term field in the formula require the contract to be saved twice before calculating correctly.
- 62418 : Quote discount percentage is incorrect when user's currency does not match currency used for the quote's creation.

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- 62420 : PDF Manager does not allow custom 1:1 relationships to be added to PDF templates.
 - 62468 : Updating the filter option when editing a report does not preserve the new filter after clicking "Save and Run".
 - 62487 : Workflow plugins are not being loaded properly.
 - 62624 : Attempting to merge a record which has been deleted incorrectly saves resulting in unexpected behaviors in related records.
 - 62712 : Lists of Sugar users sorted by username rather than first name or last name enabling the list to appear out of order.
 - 62807 : Saved import mapping's teams selection is not respected.
 - 62833 : Viewing Sugar in one of several languages causes detail views to be blank.
 - 62875 : Workflows set to trigger on new and updated records do not fire on new records meeting the conditions.
 - 63038 : Using the SOAP API's `get_entry_list` function with a custom one-to-one relationship between Accounts and Contacts results in an error.
 - 63213 : Creating a related project field and adding it to a module's detail view causes an error when attempting to view the detail view.
 - 63359 : Instance upgrade may fail when custom packages are installed.
 - 63410 : Custom relationship from cases to contacts causes new case creation from contacts subpanel to fail on autopopulated contact name.
 - 63588 : Creating a custom calculated field based on the related note's description causes records to be duplicated when the related note is removed.
 - 63596 : Time elapse workflow with "Field does not change for a specified amount of time" condition does not trigger correctly.
 - 63632 : Attempting to connect to Twitter fails with a PHP error.
 - 63674 : Reports calculating averages only considers populated values rather than counting records where the field is not populated as zeros.
 - 63774 : Elasticsearch field mappings may be incorrect causing full text search to fail.
 - 63776 : Dependent dropdown options are not functioning correctly when quick creating from a subpanel.
 - 63818 : Updated currency conversion rates incorrectly applied to opportunity amount fields in reports.
 - 63826 : Adding a sort order to the Product Template's popup selection view causes selection to fail after upgrading.
 - 63833 : Dependent fields are not functioning correctly when quick creating from a subpanel on the Quick Create Menu (+) menu.
 - 63851 : When using a period as the thousands separator, custom integer field values are not preserved correctly after record edits.
 - 63866 : Dependent dropdowns or dependent fields cause detail views, subpanels, and quick creates to not display correctly or to produce an error message.
 - 63885 : Testing the SMTP settings in Admin > Email Settings may require the password to be entered each time without any notification.
 - 63965 : The Emails module's spellchecker incorrectly reports no misspelled

words.

- 63973 : Product Catalog list view and quote product selection displays incorrect price values when prices are created and displayed in a currency other than the instance's default currency.
- 64036 : Relationships from a module to itself will have related records switched to other side of relationship after an upgrade.
- 64159 : Full text search only indexes 15,000 records per module.
- 64178 : Forecasting module shows label names rather than label text when viewing in Spanish.
- 64212 : Workflows set to process actions before alerts fail to send alerts.
- 64258 : Custom one-to-many relationships from accounts to accounts are missing subpanels after upgrade.

For more information on a bug or to provide feedback, use the SugarCRM Bug Tracker located at <http://www.sugarcrm.com/support/bugs.html>. To view the complete list of bugs fixed in this specific release, run a search using "6.7.2" 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 "6.7.2" 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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