
Sugar Ultimate 7.7.2.0 Release Notes

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Sugar Ultimate 7.7.2.0 Release Notes

Overview

This document describes the changes and functionality available in Sugar Ultimate 7.7.2.0.

Sugar 7.7.2.0 is available for both On-Demand (Sugar-hosted SaaS) and On-Site deployments.

Administrator and End User

Fixed Issues

The following issues have been resolved in version 7.7.2.0:

- [70586](#) : Stock fields (e.g. Type) may not be available to select when filtering the Contracts list view dashlet.
- [75853](#) : Dependent dropdown values with leading zeroes may not appear in the field as expected after selecting the value and saving the record.
- [75938](#): The values for MultiSelect type fields may not appear in report results as expected.
- [75956](#) : When a workflow triggers to create a call record for a lead, the lead record does not get associated to the call nor added as an invitee as expected.
- [76112](#) : Adding the Calls module to the Convert Lead layout may cause unexpected errors during lead conversion.
- [76125](#) : The Tags field values may not appear in correct alphabetical order in the module's list view (e.g. Accounts).
- [76240](#) : Required fields that are not completed when inline editing a module's layout (e.g. record view) may not get highlighted in red upon save to indicate that it needs to be completed still.
- [76290](#) : Upgrading legacy modules to the Sidecar user interface may fail for instances hosted by Sugar On-Demand.
- [76296](#) : Sugar is unable to work when using a MySQL database that requires a port number in the hostname.
- [76335](#) : The Quoted Line Items subpanel may not appear as expected when accessing opportunity records via SugarCRM Mobile.
- [76433](#) : Creating note records with attached files via the API results in an invalid Attachment field on the record in Sugar.
- [76459](#) : Removing a custom module from an instance may cause errors when viewing activity streams on related modules.
- [76467](#): Performing a Quick Repair and Rebuild for Sugar installations running

on Oracle may detect a difference between your database and metadata due to not recognizing the smallint data type.

- [76475](#) : If the List View layout for the Targets module was previously modified in Studio, the Targets list view may not display correctly after upgrading to 7.7.x.x.
- [76491](#) : Mass updating the Sync to Mail Client field from the Contacts list view may return not work as expected.
- [76505](#) : 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.
- [76525](#) : Attempting to export Rows and Columns-type reports may not work as expected when logged in with the German language.
- [76544](#) : When logged in with the German language, modifying the report's run-time filter and generating the report again may not apply the new filters as expected.
- [76616](#) : Generating reports with empty relate fields may not include the associated record in the report result as expected.
- [76630](#) : Creating a workflow action to create multiple records (e.g. Tasks) associated to the target module (e.g. Leads) may not trigger as expected.
- [76696](#) : Custom fields added to the Default column in Studio for the Knowledge Base module's List View and Popup ListView layouts may not display as expected after upgrading to 7.7.0.0 or 7.7.1.0.
- [76819](#) : Clicking the opt-out link in campaign emails may be slow to respond.
- [76839](#) : Relationships to custom modules do not function correctly after the custom module has been disabled and re-enabled via Module Loader.
- [76979](#) : The Email Address field is not available to select when checking for duplicates during the import process.
- [77144](#) : When the Marketo connector is installed on Sugar versions 7.7.1.0 and later, importing contact or lead records with email addresses in Sugar may not import the email address field as expected.
- [77222](#) : If the connection to Elasticsearch fails when performing a global search, it may result in a 503 error in Sugar and cause the search engine to become unavailable.

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 "7.7.2.0" in the Targeted In Release field. Look for the bugs marked "Fixed" in the Resolution field.

Known Issues

The following are known issues in version 7.7.2.0:

- [53969](#) : The Projects module does not have the option (star icon) to designate

records as favorites. As a workaround, the Favorites option can be enabled by changing favorites from "false" to "true" in the ./modules/Projects/vardefs.php file.

- [61338](#) : When test entries are deleted from the campaign, the related campaign emails that are sent to targets may not be viewable and display an error (Error retrieving record. This record may be deleted or you may not be authorized to view it).
- [64880](#) : Certain fields (e.g. email address, phone, etc.) in the Users module may not be available to add as field variables in PDF templates.
- [65527](#) : The SugarCRM cube icon is used as the system-wide favicon even when "Display module icon as favicon" is enabled in Admin > System Settings.
- [65647](#) : Users will not see updates to their avatar images without first logging out and back into Sugar.
- [65674](#) : Selecting an item from the Recently Viewed list under the module tab does not correctly update the list to include the selected record.
- [66209](#) : Help text is not being displayed.
- [66520](#) : Notes may not be edited directly from the Contracts module's Notes subpanel.
- [66573](#) : More than one user attempting to merge records simultaneously results in errors.
- [66580](#) : List view loads may experience performance issues as quantity of records loaded increases.
- [66826](#) : Numerical fields such as Bug Number may not be used with type-ahead functionality to generate a list of potential matches when relating records.
- [66842](#) : Relate fields cannot be sorted as expected in the list view.
- [66900](#), [67294](#) : Resetting the forecast time period does not set the current time period correctly and causes various issues in the application.
- [66910](#) : The notification for Cases module does not include the case number as expected when triggered via the workflow.
- [66995](#) : The Display server response times option is improperly available to select via Admin > System Settings.
- [67445](#) : Multiple panels cannot be added as expected to the Record View layout in Studio.
- [67886](#) : During lead conversion, the newly created opportunity record does not get associated to the Revenue Line Item, causing the lead conversion to not complete successfully. As a workaround, create the opportunity record during lead conversion then manually associate the opportunity to the Revenue Line Item.
- [68095](#) : Text provided for Campaign Tracker URLs is unexpectedly shortened after the first 30 characters.
- [68112](#) : Matrix-type reports display incorrectly when exported to PDF.
- [68245](#) : Calendar dashlet may be missing from Legacy dashboard after upgrading to 7.2.0.
- [68426](#) : New panels added to the Record View layout in Studio do not display

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- the panel options (Display Type, Collapse?) until the layout is saved in Studio.
- [68440](#) : Quick creating (e.g. Leads, Contacts, etc.) via the Emails dashlet on the Legacy dashboard opens up the legacy create view instead of the sidebar record view.
 - [68461](#) : Searching by non-primary email addresses in the module's list view (e.g. Accounts) does not pull up results as expected.
 - [68464](#) : Changes made to record view layouts via studio are not reflected when quick creating records until after the full creation view is used.
 - [68975](#) : Changing the order of subpanels via Admin > Display Modules and Subpanels does not preserve the order upon save.
 - [68979](#) : Changing the currency of a quote multiple times may introduce rounding errors to the line item price fields.
 - [69382](#) : Campaign tracker URLs may log campaign status entries with no recipient information when clicked from outside the campaign email.
 - [69391](#) : Changes made to module names via Admin > Rename Modules are not reflected on list views columns for modules which relate to the affected module. The column names may be corrected individually by modifying each listview's column labels via Studio.
 - [69508](#) : Relating a new record via the Legacy module subpanel (e.g. Calls) in a module's record view (e.g. Leads) causes the Next and Previous buttons to no longer appear in the record view. Navigating back to the list view and selecting a record will correct the issue by restoring the buttons again in the record view.
 - [69801](#), [69918](#) : Changing the style attributes for table tags, image tags, etc. on email templates via HTML may result in parts of the code getting removed upon save.
 - [69985](#): If a custom module has a relationship with an individual Activity-type module (e.g. Tasks), this related module may not be available to select when creating a workflow action to create a record in a module (Tasks) associated with the target module (e.g. custom module). As a workaround, create a one-to-many relationship between the custom module and the Activities module, and the appropriate Activity-type module (e.g. Tasks) will be available to select when creating the workflow action
 - [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.
 - [70106](#) : The Skype icon does not appear next to the phone number as expected when the SkypeOut integration is enabled.
 - [70124](#) : Studio's formula builder displays several undesired functions (getListWhere, isForecastClosed, isForecastClosedWon, and isForecastClosedLost).
 - [70389](#) : Tabbing while inline editing the address block in the record view does not work as expected as it does not tab through all the fields (e.g. state, postal code, etc.) within the address block.
 - [70542](#) : The "Show Completed Meetings, Calls, and Tasks" option is not available in Calendar > Settings, which can cause performance issues in the

Calendar module for users who have a large number of activity records. Setting Admin > System Settings > vCal Updates Time Period to "-1" will relieve the performance delay, however this will prevent user availability information from appearing when scheduling a call or meeting.

- [70553](#) : Disabling export via Admin > Locale does not remove the Export option as expected from the list view.
- [70601](#) : Custom HTML files including javascript may not render correctly after upgrade to 7.5.0.0.
- [70751](#) : Modules set as disabled in Sugar continue to improperly appear in the Sugar portal. Administrators can disable the modules via roles in Sugar portal, which should resolve the issue.
- [71446](#) : For opportunities and revenue line items, changes made to labels via Studio > {Module Name} > Labels do not affect list view labels. Make changes to labels via Studio > {Module Name} > Layouts > List View to modify list view layouts.
- [71733](#) : Printing archived emails via the browser's print option may not display correctly.
- [71807](#) : Studio layouts appear in reverse order when right-to-left themes are enabled.
- [72000](#) : Changing the Admin user with user ID = 1 to a regular user may cause the system index to not index records properly in Sugar. To resolve the issue, change the Admin user (user ID = 1) back to a System Administrator User.
- [72022](#) : The Projects module is incorrectly available to select via Admin > Mobile.
- [72098](#) : Clicking the "Restore Default" button in Admin > Studio automatically saves and displays the out-of-the-box default layout despite not saving the change in Studio.
- [72264](#) : Clicking on the opportunity's name in the Quotes detail view after downloading the quote to PDF improperly redirects to the home page instead of the opportunity's record view. As a workaround, right-click on the opportunity name after downloading the quote to PDF and the opportunity's record view will open accordingly.
- [72286](#) : The Opportunity module's amount fields cannot accept negative values.
- [72326](#) : Restricting dropdown options (e.g. moduleListSingular) via Admin > Dropdown Editor applies to Process Author modules which may result in unexpected behavior.
- [72409](#) : When generating a report, labels may improperly overlap in the chart (e.g. Vertical Bar chart) causing the labels to be unreadable.
- [72588](#) : Synchronizing the Google Calendar with the Sugar calendar may not sync the tasks as expected.
- [72882](#) : When accessing Sugar using Internet Explorer, the date picker does not display properly and disappears when using the scroll bar on the page. As a workaround, scrolling with your mouse or trackpad will display the calendar picker properly.

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- [72887](#) : Customizing a role-list while creating a custom DropDown field in Studio causes the new field to not be saved. As a workaround, create and save the new field before making changes to any role-lists.
 - [72903](#) : The Save button on the Visual Design toolbar of a process definition does not consistently assume an inactive state to indicate that recent changes have been saved.
 - [72906](#) : Non-admin users who have developer-level role access to Sugar modules do not have access to the Process Author panel on the Administration screen. These users may navigate to Process Management via the Processes module tab menu.
 - [72955](#) : Module loader does not prevent packages containing invalid characters from being uploaded to Sugar which can issues when upgrading to version 7.x as invalid characters are not allowed.
 - [72956,73729](#) : Populating a target list by selecting a report for a module (e.g. Accounts) may not add all records as expected if the report contains a large amount of data.
 - [72962](#) : Dependent fields containing a related() function may cause the data to not display as expected in the module's list view.
 - [73009](#) : When the total file size in the ./upload/upgrades/module/ directory is large, it may cause performance issues in Admin > Module Loader.
 - [73025](#) : Changes made to audited custom relate fields do not display in the View Change Log as expected.
 - [73259](#) : Accepting or rejecting a recurring call or meeting accepts the first meeting or call in the series instead of the full recurring series.
 - [73301](#) : Attempting to edit Sugar Logic formulas with too many lines in the formula may cause an error ("Formula Builder: Error Loading Content") in Studio's formula builder. As a workaround, edit the formula to remove any line breaks.
 - [73372](#) : During process execution, the process user can edit the Assigned To field but it will not be saved. The process user should instead use the "Change Assigned To User" option in the target record's actions menu. This option must have been enabled by the administrator in the process definition's design.
 - [73379](#) : Process Author dashlets do not automatically refresh when toggling between tabs within the dashlet.
 - [73384](#) : Add Related Record actions cannot be used in process definitions when the target module is set to "Revenue Line Items".
 - [73391](#) : Process activities related to a lead or contact record cause the Suffix, First Name, and Last Name fields to display on separate rows on the form execution screen.
 - [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.
 - [73485](#) : Parent modules incorrectly appear in related module dropdown lists.
 - [73488](#) : Re-ordering list view columns does not work as expected for iPad and mobile devices.
 - [73490](#) : When a user's access to the Forecasts module is disabled, it

improperly causes the Forecast Pipeline Chart dashlet to be unavailable to add even though the user has access to the Opportunities and/or Revenue Line Items module.

- [73492](#) : Sorting the Forecasts module by Likely, Best, or Worst fields may not sort by the base currency amount as expected.
- [73674](#) : Creating and inserting a link in the body of the Knowledge Base article may not work as expected when accessing Sugar using Internet Explorer 11.
- [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.
- [73891](#) : Attempting to reorder subpanels in the module's record view may not work as expected when logged into Sugar using Chrome on Windows. As a workaround, disable the "Enable Touch Events" option for Chrome and users should be able to drag and drop subpanels accordingly.
- [73929](#) : Cases created from inbound emails may improperly display the case's description as HTML.
- [74118](#) : The My Items filter is incorrectly available for use in the Processes list view and dashlet.
- [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.
- [74431](#) : Downloading a quote to PDF may result in a TCPDF error if the PDF file includes a header image and spans multiple pages.
- [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"
- [74687](#) : Avatar field marked as required in Admin > Studio may cause Sidecar modules to not save as expected and result in an error.
- [74799](#) : Opportunities with the Forecast Bar Chart dashlet in the intelligence pane may fail to load with a 500 error if the expected close date is set outside of the time period defined in Admin > Forecasts. As a workaround, either remove the Forecast Bar Chart dashlet from all opportunity record views or reconfigure a wider range in time period via Admin > Forecasts. Please note that all existing Forecast data will be lost if the time period is changed.
- [74818](#) : List view column widths for custom modules may appear collapsed after upgrading from Sugar 7.5.x.x to 7.7.x.x. To resolve the issue, administrators can navigate to Admin > Studio to change the module's list view column width or users can manually resize the column widths via the module's list view.
- [74912](#) : In the Process Business Rules module, it is possible to create a business rule that exceeds the maximum SQL query length, resulting in a Javascript error and blank screen on save.
- [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.

- [74942](#) : Instances may experience intermittent errors involving the relationships cache file. As a workaround, remove /cache/Relationships/relationships.cache.php and run a relationship repair via Admin > Repair > Rebuild Relationships.
- [75258](#) : Mass updating or importing records (e.g. cases) that are related to records (e.g. accounts) with large datasets may result in PHP memory errors.
- [75302](#) : Activities (e.g. calls and meetings) created via the Calendar module tab's actions menu may not appear in the calendar grid as expected. Reloading the web browser will display the newly created activity (e.g. call) in the calendar grid.
- [75689](#) : Users assigned a role where access to the Contacts module is disabled may see the Import button improperly appear on the D&B: Contact Information dashlet which results in an error when clicked.
- [75834](#) : Users assigned a role with Read Only permissions for a field in a module may not be able to execute approval processes for records in that module due to an internal server error.
- [75916](#) : Customizing JS and other core files may cause customizations to not work as expected after upgrading to 7.7.x.
- [75931](#) : Process definitions cannot translate currency values entered as plain text via Constants > String, Number and Boolean in the formula-builder window. As a workaround, always add currency values to the formula window via Constants > Currency.
- [75937](#) : Users assigned a role where access to the Project Tasks module is disabled are improperly able to create project tasks via the Project Tasks subpanel.
- [75939](#) : Importing a large number of records (e.g. 8,000) in Sugar may fail to import as expected. As a workaround, break up the import file into smaller batches with less than 5,000 records.
- [75940](#) : Mass deleting more than 20 Account records with numerous related records may fail to delete as expected and result in an error.
- [75960](#) : Running JSMIn version 2.x (e.g. 2.0.1) in PHP may cause unexpected issues when utilizing Sugar. Reverting to JSMIn version 1.x (e.g. 1.1.0) should resolve the issue.
- [76007](#) : Inline editing the User field for records in the module's list view (e.g. Accounts) may display an error upon save for users assigned a role with View and Edit permissions set to "Owner". Reloading the web browser will resolve the issue and display the updated assigned user's name for the record in the list view.
- [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.
- [76025](#) : Related record subpanels may not display as collapsed by default on the process's form execution screen, as well as the Targets record view after

it has been converted.

- [76040](#) : Certain modules may be marked as customized in Admin > Studio > Export Customizations after installing or upgrading to 7.7.0.0.
- [76063](#) : Renaming custom modules via Admin > Rename Modules may not work as expected and display the module name incorrectly in certain areas of Sugar. As a workaround, change the module name in custom/Extension/application/Ext/Language/en_us.PKG.php, perform a "Quick Repair and Rebuild" via Admin > Repair, then change certain labels (e.g. LNK_NEW_RECORD) to reflect the correct module name via Admin > Studio.
- [76067](#) : Certain meters (e.g. Standard Contacts, Family Tree, Accounts) in the D&B: Usage Meter dashlet may not show the used credit levels in green.
- [76068](#) : The D&B: Usage Meter dashlet may not display correctly when the connector is enabled for the Standard license type.
- [76107](#) : Generating Calls, Meetings, or Tasks reports grouped by "Day" for Date or Datetime fields (e.g. Day: Start Date, Day: Date Created, etc.) may result in a database failure error for certain database stacks (e.g. DB2).
- [76113](#) : When accessing Sugar using Chrome or Firefox, clicking the "i" icon for Call, Meeting, or Task record cells on the calendar view may cause the calendar grid to appear blank and improperly display the more information pop-up window at the bottom of the screen.
- [76124](#) : Users assigned a role with View permission set to "None" for a module (e.g. Contacts) may be able to preview the module record via the Search and Add drawer for Sidecar modules.
- [76126](#) : When entering a dependency formula for a DropDown-type field, clicking the Cancel button on Studio's formula builder may not close the window as expected and result in an error.
- [76129](#) : When a module is renamed via Admin > Rename Modules, the Related to field in Sugar continues to display the previous module name instead of the new name.
- [76130](#) : Printing reports with charts (e.g. Summation-type reports) to PDF may not display correctly when logged in with languages using right-to-left script (e.g. Arabic, Hebrew).
- [76141](#) : When related record subpanels in Legacy module detail views (e.g. Contracts) are collapsed for newly created records, the double arrow icon may no longer appear for users to expand the subpanel. As a workaround, refresh the page and the double arrow icons will appear again.
- [76389](#) : Changing the Assigned To user from the Campaigns edit view may not update the field as expected. As a workaround, mass update the Assigned To field for the campaign record(s) from the Campaigns list view.
- [76518](#) : Selecting "Import from Build a List" from the Accounts, Contacts, or Leads module's actions menu may display an error (Field Render Failed Unable to render the dnb_bal_job_fn field. Please contact technical support) when logged into Sugar using Internet Explorer 11. The D&B Build a List page works properly after closing the error message.
- [76524](#) : Dependent fields may not appear in the layout (e.g. Record View) as expected if the parent field (e.g. parent dropdown) is not present.

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- [76574](#) : Disabling and enabling modules via Admin > Search then scheduling a system index prior to saving may cause a 500 error to occur when performing a global search.
 - [76647](#) : Configuring the email settings and sending a test email via Admin > Email Settings may not work as expected when logged into Sugar with Brazilian Portuguese language. As a workaround, log into Sugar with the English (US) language to configure and send test email.
 - [76695](#) : Reports created for the Knowledge Base module may not work as expected after upgrading to 7.7.1.0 if any invalid fields (e.g. Expiration Date) are detected in the report.
 - [76697](#) : Processes enter an infinite loop state when the Start event's criteria are accomplished within the process definition's cycle or when multiple process definitions accomplish each other's criteria.
 - [76698](#) : Previously existing reports may not display the Primary Team Name field values (e.g. East) as hyperlinks after upgrading to 7.7.1.0. Creating a new report including the Primary Team Name field will display the field values as hyperlinks as expected.
 - [76699](#) : When logged into Sugar using certain browsers (e.g. Internet Explorer 11), multiselect-type fields may not display properly when inline editing or mass updating the field via the module's list view.
 - [76728](#) : Inserting Tracker URLs may not insert the links correctly causing the link to not work in the email campaign. As a workaround, manually update the inserted link via the HTML editor or the Insert/Edit Link option to the correct one.
 - [76931](#) : Changing panel labels via the module's layout (e.g. Opportunities Record View) in Studio may not update as expected after upgrading to 7.7.1.0. As a workaround, edit the label via Admin > Studio > {Module Name} > Labels and the change will be preserved.
 - [77116](#) : Generating a report that includes the Relate-type field may not return results as expected if the field is empty. Populating the Relate-type field for records will display those records in the report results accordingly.
 - [77205](#) : Viewing a page (e.g. list view) in Sugar without performing any actions for a period of time (e.g. 3 minutes) may cause an error message (Request Timeout: The server is not responding. Check your internet connection.) to appear unexpectedly.
 - [77260](#) : Session locking may cause performance issues in Sugar.
 - [77302](#) : Upgrades may fail due to queries posted by the upgrade exceeding the max_allowed_packet database setting.
 - [77311](#) : Subpanels may not work as expected after upgrading to 7.7.1.1 if certain files exist in the instance.
 - [77340](#) : Removing the Expected Close Date column via Admin > Forecasts Settings may cause the forecast worksheet and the Forecast Bar Chart dashlet to display incorrectly.
 - [77360](#) : Creating emails or notes with attachments in certain Sidecar modules (e.g. Notes, Knowledge Base, and Cases) may fail with an error when logged into Sugar using Firefox version 49.0.1.

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- [77362](#) : When creating or editing an alert email template for workflows, certain related modules may not be available to select as expected in the Related Module dropdown field.

Developer

Development Changes

Changes in release 7.7.2.0 which may affect developers include the following:

- The News dashlet has been disabled in this release since it relied on the Google News Search API which has been [deprecated since 2011](#). Any code that relied on this News dashlet or the Google News Search API will need to be updated to use an [alternative news API](#).
- Some PreviewLayout metadata customizations that were non-functional in 7.7.0 have been corrected.
- Sidecar math functions will now return strings instead of numbers in order to improve the way Sidecar handles math and currency values. This will prevent floating point errors, specifically when dealing with currencies. The improved implementation relies on the big.js version 3.1.3 library that was introduced in this release.

Additional Product Information

Sugar 7.7.2.0 does not include support for the following pieces of functionality:

- Offline Client is not supported in Sugar 7.
- Sugar Mobile Plus is not supported in Sugar 7.

Supported Platforms

For information on supported platform components, see [Sugar 7.7.x Supported Platforms](#).

Last Modified: 02/14/2017 12:00pm