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# **Sugar Professional 8.1.0 Release Notes**

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# Sugar Professional 8.1.0 Release Notes

## Overview

This document describes the changes and functionality available in Sugar Professional 8.1.0. For more information on the changes in this release, please refer to the [What to Expect When Upgrading to 8.1](#) article.

Sugar 8.1.0 is only available for Sugar cloud (Sugar-hosted SaaS) deployments.

## Administrator and End User

### Feature Enhancements

The following feature enhancements are included in this release:

- **Reporting**
  - [Report Schedules module](#): Scheduled reports functionality has been migrated to the new Report Schedules module which makes it easier for a user to manage their emailed reports.
  - [Stock reports](#): Over 100 new stock reports are available in the Reports module.
- **Data Privacy**
  - [Email opt-in link](#): Users can generate a link to send to customers which, when clicked, will mark the opted-out email address as opted-in.
  - **Data erasure for activity streams**: Erasing personal information via the Data Privacy module now removes the erased values from activity stream posts.
- **Emoji support**: The Emails module can now display emojis used in message content, and users can use emojis in Sugar text fields.
- **Additional information at login**: Sugar's login screen now includes an image and the ability to display notifications from SugarCRM. Admins have the option to disable this via Admin > System Settings > Enable additional login screen content. Instances with customized login screens will have this option disabled automatically when upgraded to 8.1.

### Fixed Issues

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

- 
- [81035](#) : Modifying the subpanels appearing on the Data Privacy record view prevents users being able to mark records within those subpanels for erasure.
  - [81026](#) : Users may be unable to login to Sugar or may be unable to use global search due to an error caused by Elastic Search settings being absent from config\_override.php.
  - [81001](#) : In the REST API version 4.1, calling get\_entry\_list on the Contacts module fails to return valid account\_name and account\_id values.
  - [80915](#) : LDAP users may be unable to log into Sugar due to the presence of 'authenticationClass' => '' in config.php.
  - [80886](#) : LDAP users may be unable to log into Sugar when LDAP is configured to use anonymous binding.
  - [80866](#) : Reports may fail to return correct results when the Optional Related Modules option is used.
  - [80860](#) : Campaigns' email marketing records are not able to be edited.
  - [80851](#) : List views may fail to load when multiple custom relationships have been created between modules.
  - [80813](#) : The SOAP API and is not available for use, rendering applications which use SOAP unable to connect to Sugar.
  - [80808](#) : Records views may fail to load when the Actions menu has been customized using non-sequential button ordering.
  - [80671](#) : Prepared statements built using Doctrine's SQL builder class do not appear in slow query logging as expected.
  - [80605](#) : Integrations and customizations using the REST v4.1 API may no longer work as expected for instances running on PHP 7.1.
  - [80477](#) : While importing records, choosing "Salesforce" as the data source results in an error.
  - [80475](#) : When building a workflow alert template, users are not able to insert field variables based on related modules.
  - [80469](#) : The "Clean up unused combinations of teams" repair does not remove unused sets of teams from Sugar's database as expected.
  - [80422](#) : Report filters based on fiscal quarters do not respect the fiscal year start date configured via the Forecasts module.
  - [80163](#) : Modules using the legacy user interface experience degraded performance when Sugar's tracker tables grow very large.
  - [80094](#) : Legacy workflows which use a checkbox field in their trigger conditions may not function as expected.
  - [80083](#), [79956](#), [79251](#) : List view filters which are applied before the list view finishes loading may not be respected by the displayed results.
  - [79785](#) : While importing records, clicking "Undo Import" removes the imported records from Sugar but errantly allows the records to appear as results in global search.
  - [79643](#), [72456](#) : Inbound emails containing emojis may not get imported into Sugar as expected.
  - [79166](#) : Session locking may cause performance issues in Sugar.
  - [78555](#) : Reports which attempt to display the Knowledge Base module's

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Active Revision field result in an error.

- [78339](#) : Global search does not return results matching search strings which are portions of field values and greater than 16 characters long.
- [78278](#) : Reports which attempt to filter on multiselect fields created via Module Builder do not return results as expected.
- [77979](#) : Using the v4 SOAP API to retrieve lists of records may experience performance issues when tags are heavily used in the instance.
- [77330](#) : Report filters cannot be created based on the Product Catalog module's Product Category field.
- [77314](#) : List views sorted by custom fields may experience degraded performance for modules containing a large number of records.
- [76000](#), [75999](#) : Setting the Collation option to "utf8mb4\_general\_ci" via Admin > Locale may cause unexpected errors.
- [73282](#) : Forwarding an email from within Sugar does not include the body of the original email in the newly sent message.

## 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:

- [81151](#) : Report chart drill-through may not work as expected when the report is filtered by a checkbox field.
- [80864](#) : The link to a lead's related opportunity is blank on the lead-conversion confirmation screen. As a workaround, open the preview panel for the opportunity's row to access a link to the opportunity.
- [80834](#) : Line charts may not render correctly when viewing report records in the Chrome browser.
- [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

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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.
- [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.
- [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.
- [79458](#) : Subpanels for related legacy modules may not display for the Quotes record view as expected.
- [79344](#) : The quoted line item total may not respect the user's preferred

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currency as expected.

- [79243](#) : Attachments on knowledge base records may not be visible on record view despite having been successfully uploaded.
- [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.
- [78850](#) : The Saved Reports Chart dashlet may not render the chart as expected for certain reports when the Bar chart value placement field is set to an option other than "None" or "Total". Selecting "None" or "Total" for the Bar chart value placement field will render the charts properly in the dashlet.
- [78736](#) : Out-of-the-box dashboards may incorrectly be recreated after deleting it from the home page or intelligence pane.
- [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.
- [78668](#) : In certain circumstances, the tooltip (e.g. Create) may continue to persist improperly while navigating through Sugar. Reloading the web browser will clear the tooltip from the screen.
- [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.
- [78570](#), [78509](#), [78507](#), [76151](#) : When accessing Sugar using Internet Explorer or Firefox, attempting to clear a saved filter from the list view or subpanel search may not work as expected. As a workaround, select the All "Module Name" option from the Filter options list to clear the applied filter.
- [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

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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.
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- [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.
- [74416](#): Creating a Summation-type report that is grouped and sorted by a certain field (e.g. Month: Expected Close Date, Quarter: Expected Close Date) in a related module (e.g. Opportunities) may cause the run-time filter to not work as expected.
- [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.

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- [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:

- A db logger channel has been added to allow for more fine-grained control over log messages related to the database. For example, the following config option will cause related debug messages to be written to the log file regardless of the global Sugar log setting:  
`$sugar_config['logger']['channels']['db']['level'] = 'debug';`
- The format for database-related log messages has changed.  
Previous format:  
Tue 03 Jul 2018 01:27:39 PM PDT [23772][1][INFO] Query: SELECT name

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FROM users  
WHERE id = 1

New format:

Tue 03 Jul 2018 01:27:39 PM PDT [23772][1][INFO] Query: SELECT  
name\n FROM users\n WHERE id = 1

For development purposes, the original multi-line message can be restored using sed 's/\n\n/g' sugarcrm.log

- The SugarCache implementation has been refactored to support [PSR-16](#) cache interface and encrypted storage for multi-tenant cache use. As part of these changes, cache backends that extend SugarCacheAbstract are deprecated and will be removed in a future Sugar release. Cache implementations from Sugarcrm\Sugarcrm\Cache\Backend namespace should be used instead. Usage of the characters reserved by PSR-16 in cache keys such as ()/@: are no longer supported. Currently, these characters are converted to - and warnings are logged in sugarcrm.log.
- The following Sugar Config parameters have been added for SugarCache:
  - cache.backend is a string that can be used to define which caching backend class that should be used.
  - cache.multi\_tenant is a boolean that can be used to enable multi-tenant cache behavior.
  - cache.encryption\_key can be used to define the encryption key for use in multi-tenant mode. This key will be generated automatically and doesn't need to be specified manually.
- When using Sugar with Elasticsearch 6.x, Sugar will create one search index per module.
- The following PHP libraries were updated or added in this Sugar release:
  - The Elastica library was upgraded from v5.3.0 to v6.0.1. Please refer to the Elastica [changelog](#) for more details if you have custom code that calls Elastica library directly.
  - AWS SDK for PHP (aws/aws-sdk-php) v3.55.3 was added in this Sugar release. For more information on this SDK, please visit the [Amazon website](#).
- Slow queries created using Doctrine QueryBuilder are now logged as FATAL errors when "Log slow queries" is enabled via Admin > System Settings. The associated boolean SugarConfig setting is dump\_slow\_queries.
- Monolog channels no longer support non-PSR logging levels like "fatal". For more information on PSR compliant logging levels, refer to the [PSR-3 Logger](#) page of Sugar's Developer Guide.
- An option has been added to module loadable package manifests that will allow Module Loader to ensure all traces of previously installed package versions (including packages that have been upgraded multiple times) are removed.

<?php

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```
$manifest = array(
    'id' => '<id>',
    ...
    'uninstall_before_upgrade' => true,
    ...
);
```

Custom pre- or post-install scripts that remove old versions of the package when upgrading may no longer be necessary when using the new `uninstall_before_upgrade` option.

- Sugar can now be configured to use Amazon Elasticsearch Service. This requires some different AWS specific configuration as seen in the example below.

```
'full_text_engine' => array (
    'Elastic' =>
    array (
        'transport' => 'AwsAuthV4',
        'aws_access_key_id' => '<aws access token>',
        'aws_secret_access_key' => 'aws secret access key',
        'aws_region' => 'aws region',
        'host' => 'aws ES server host',
    ),
),
```

- Filter API performance has been significantly improved in this release by optimizing how the API queries the database. Instead of running a single complex SQL query, Filter API requests are now implemented using two simpler SQL queries. This change should significantly improve list view performance for modules with many records and complex team security rules.
- The following authentication-related files were removed:
  - `sugarcrm/modules/Users/authentication/EmailAuthenticate/EmailAuthenticate.php`
  - `sugarcrm/modules/Users/authentication/EmailAuthenticate/EmailAuthenticateUser.php`
  - `sugarcrm/modules/Users/authentication/LDAPAuthenticate/LDAPAuthenticate.php`
  - `sugarcrm/modules/Users/authentication/LDAPAuthenticate/LDAPAuthenticateUser.php`
  - `sugarcrm/modules/Users/authentication/LDAPAuthenticate/LDAPConfigs/default.php`
  - `sugarcrm/modules/Users/authentication/SAMLAuthenticate/SAMLAuthenticate.php`
  - `sugarcrm/modules/Users/authentication/SAMLAuthenticate/SAMLA`

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authenticateUser.php

- sugarcrm/modules/Users/authentication/SAMLAuthenticate/SAMLRquestRegistry.php
- sugarcrm/modules/Users/authentication/SAMLAuthenticate/index.php
- sugarcrm/modules/Users/authentication/SAMLAuthenticate/saml.php
- sugarcrm/modules/Users/authentication/SAMLAuthenticate/settings.php
- sugarcrm/modules/Users/authentication/SugarAuthenticate/SugarAuthenticate.php
- sugarcrm/modules/Users/authentication/SugarAuthenticate/SugarAuthenticateExternal.php
- sugarcrm/modules/Users/authentication/SugarAuthenticate/SugarAuthenticateExternal.php

The following authentication classes have been replaced:

- SAMLAuthenticate has been replaced by IdMSAMLAuthenticate.
- LDAPAuthenticate has been replaced by IdMLDAPAuthenticate.
- SugarAuthenticate has been replaced by IdMSugarAuthenticate.
- SugarAuthenticateExternal has been replaced by

ExternalAuthenticate. If you have customized authentication, please test to ensure it works correctly after upgrade.

- The [clipboard.js v2.0.0](#) library has been added to Sugar.
- In order to support importing and displaying emails that contain emoji, MySQL databases now use the utf8mb4 character set and the utf8mb4\_general\_ci collation. The character set and collation will be set automatically for new instances of Sugar and updated during the upgrade of existing instances of Sugar. Upgrading instances are not anticipated to experience issues, but upgrade testing is recommended.

Tables with very large row sizes (e.g. custom tables with a large number of custom fields) may be unable to be automatically upgraded. The upgrade script will notify you if a table would exceed the single-row size supported by MySQL (65,535 bytes) upon conversion to utf8mb4. In order to reduce the row size, we recommend the following:

- Remove fields that are not being used.
  - Reduce the lengths for char/varchar fields (e.g. size of longest existing value plus some padding).
  - Replace large varchar fields with text fields. Text fields are roughly 10 bytes, so significant size reduction exists when text fields can replace large varchar fields (e.g. VARCHAR(255)).
- The EmailMarketing::time\_start property has been removed in this release. The start time of an email campaign should be derived by parsing the EmailMarketing::date\_start attribute.
  - The function View.Views.Base.HistorySummaryHeaderView.\_getParentModelName is now deprecated.
  - The translatable template string TPL\_HISTORICAL\_SUMMARY stored in

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sugarcrm/include/language/en\_us.lang.php now uses unescaped values. Please ensure you are NOT using this template in combination with Handlebars.SafeString as this would make your code vulnerable to XSS attacks.

- The Sugar login page has been updated to display content from SugarCRM. The content will not display on any window smaller than 1024px (this includes most phones and tablets). We recommend testing that any customizations you have made to the Sugar login page continue to work on both large and small screens.

The following sidecar views have been added:

- MarketingExtrasView
- MarketingExtrasView has been added to LoginLayout

As part of the upgrade, the login page implementation of Forgot Password layout endpoint GET /login/content was added to REST API version 11.2.

- Admins can choose to disable the SugarCRM content from appearing on the login page via Admin > System Settings > Enable additional login screen content. The marketing\_extras\_enabled boolean SugarConfig setting has been added in this Sugar release. Setting this value to false will disable the custom content from SugarCRM on the login page.

## Supported Platforms

For information on supported platform components, see [Sugar 8.1.x Supported Platforms](#).

## Upgrade Paths

| Package          | From Version(s) | MySQL                    |
|------------------|-----------------|--------------------------|
| New Installs     |                 | <input type="checkbox"/> |
| 7.9.4.0-to-8.1.0 | 7.9.4.0         | <input type="checkbox"/> |
| 8.0.0-to-8.1.0   | 8.0.0           | <input type="checkbox"/> |

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